

## OES DATA SYSTEM INSTRUCTIONS TABLE OF CONTEXT



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# OES DATA SYSTEM INSTRUCTIONS INTRODUCTION



WELCOME TO THE OES DATA SYSTEM INSTRUCTIONS. WHEN YOU FIRST ENTER THE SYSTEM YOU WERE PROMPTED TO A LOGIN FORM. THIS IS FOR THE PROTECTION OF THE SYSTEM. THE SYSTEM HAS SENSITIVE DATA THAT HOLDS DATA INFORMATION OF YOUR MEMBERS, DUES, MINUTES, TREASURY AND OTHER IMPORTANT DATA THAT IS USEFUL TO YOUR RECORDS KEEPING.

AS YOU NOTICED, ONCE YOU LOGGED IN, THE OES SYSTEM FORM MENU OPENS. THIS IS THE OES SYSTEM MAIN MENU. HERE YOU WILL FIND 5 SQUARE MENUS WHICH ARE MEMBERS, MINUTES, ADMINISTRATOR, ADD DATE AND THE INSTRUCTIONS FILES. BEFORE BEGINNING ANY DATA ENTRY ACTIVITY, CLICK THE ADD DATE SQUARE. THE ADD DATE FORM WILL OPEN WHERE YOU WILL CLICK THE ADD BUTTON, CHOOSE THE DATE OF YOUR MEETING, THEN SAVE. ONCE YOU HIT SAVE, THE FORM WILL CLOSE AND BRING YOU BACK TO THE OES SYSTEM MAIN MENU. THE DATE WILL BE SAVED TO BE USED TO THE REST OF YOUR DATA.

THE DATE WILL BE USEFUL IN THE MEMBER ENTRY FORM FOR REPORT PRINTING. PLEASE SEE THE MEMBERS FORM INSTRUCTIONS FOR MORE INSTRUCTIONS.

YOU WILL BE PROVIDED WITH A PASSWORD TO LOGIN TO THE MAIN FORM AND TO LOGIN TO THE ADMINISTRATOR. THE ADMINISTRATOR FORM IS USED TO ADD, DELETE, AND CHANGE ADMINISTRATOR LOGIN FORM AND LOGIN TO THE MAIN OES SYSTEM MENU.

### NOTICE!

PERSONNEL THAT SHOULD HAVE ACCESS TO THIS SYSTEM, ARE WORTHY MATRON, (WORTHY PATRON OPTIONAL), AND THE SECRETARY. THIS FORM SHOULD BE USED BY THE SECRETARY.

TO LOG OFF FROM THE OES SYSTEM MAIN MENU, SIMPLY CLICK THE DOOR IMAGE LOCATED AT THE BOTTOM RIGHT OF THE FORM AND THE RED X LOCATED TOP RIGHT OF THE FORM. MAKE SURE THAT YOU HAVE SAVED ALL OF YOUR DATA BEFORE EXITING.

THE OES SYSTEM SOFTWARE WAS DELVELOP TO BE USER FRIENDLY. SHOULD YOU HAVE ANY QUESTIONS OR HAVE ANY SOFTWARE ERRORS, PLEASE CONTACT THE SOFTWARE DEVELOPER FOR ANY CONCERN OR QUESTIONS AT

lorallc@hotmail.com

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THIS IS THE MEMBERS FORM INSTRUCTIONS. YOU SHOULD ALREADY HAVE ADDED A DATE FOR YOUR DATA. THE DATE IS USED TO PRINT MEMBERS STATUS REPORT.

IN THIS FORM YOU HAVE ADD, SAVE, AND DELETE BUTTONS. TO ADD A MEMBER FIRST CLICK ADD. YOU WILL NOTICE AN -1 IN THE MEMBER ID BOX AND IT WILL ALSO PROMPT A MESSAGE WITH THE ADD A MEMBER. CLICK OK. ONCE YOU ADD THE MEMBER CLICK SAVE, THIS WILL SAVE THE MEMBER TO YOUR DATA. PLEASE DO NOTICE THAT THE -1 IN THE MEMBER ID WILL STILL BE THERE. MAKE SURE THAT EITHER CLOSE THE FORM AND REPOPEN OR CLICK ADD MEMBERS DUES SO THAT IT WILL REFRESH THAT DATA. ONCE DOING SO, NOTICE THAT THE -1 AT THE MEMBER ID WILL BE CHANGED TO 1. PLEASE ADD A NEW MEMBER ONE AT A TIME. YOU CAN DELETE MEMBERS BY CLICKING DELETE. ONCE DELETE, THE DATA WILL BE SAVED AND UPDATED.

IF YOU WANT TO ADD NEW DUES FOR YOUR MEMBERS JUST CLICK ADD MEMBERS DUES. IT WILL OPEN A NEW FORM TO ADD NEW DUES. TO ADD NEW DUES FOR YOUR MEMBER, PLEASE FIRST BROWSE FOR THAT MEMBER IN THE SEARCH MEMBER, ONCE YOU LOCATE THE MEMBER, CLICK ADD MAKE SURE THAT YOU ENTER ALL CORRESPONDANT DATES AND ENTRY TO THE FORM. AFTER ADDING THE DUES, CLICK SAVE. THIS WILL REDIRECT YOU TO THE MEMBER FORM. DO THIS TO EACH MEMBERS TO ADD DUES.

### NOTICE!

YOU CAN NOT DELETE DUES FROM THE DUES FORM. YOU CAN EDIT AND DELETE FROM THE MEMBERS FORM.

IN THE MEMBERS FORM ENTRY, YOU WILL NOTICE THE MEMBERS DUES TABLE. THERE YOU WILL EDIT AND SAVE DUES. IF YOU WOULD LIKE TO CHANGE DATA FROM THE MEMBERS DUES TABLE, JUST CLICK ON WHAT YOU WOULD LIKE TO CHANGE AND CLICK THE SAVE DUES AFTER EDIT BUTTON. THIS WILL SAVE THE CHANGES.

### NOTICE!

BY CLICKING THE DELETE DUES BUTTON, THE DUES FOR THAT MEMBER WILL BE ERASED.

YOU CAN PRINT MEMBERS REPORT. THIS REPORT WILL SHOW YOU, A COUNT OF ALL MEMBERS THAT ARE ON YOUR CHAPTER. THIS WILL NOT SHOW A STATUS. IF YOU WOULD LIKE A REPORT OF YOUR MEMBERS STATUS, YOU CAN PRINT THE MEMBERS STATUS REPORT. THE REPORT IS PRINTED BY DATE OF THE MEETING. ONCE YOU CLICK THE MEMBERS STATUS REPORT BUTTON, A FORM WILL OPEN. CLICK THE DROP DOWN BUTTON AND LOOK FOR THE DATE TO SHOW AND PRINT. YOU CAN ALSO SAVE THIS INTO PDF FILE FORMAT.

THIS IS THE MINUTES INSTRCTIONS FORM. YOU SHOULD ALREADY HAVE A DATE SAVE IN THE DATA FOR YOU TO USE. THE MINUTES FORM IS USED TO RECORD THE MINUTES. WHAT'S INCLUDED IN THIS FORM ARE THE TEXT BOXES FOR YOU TO TYPE YOUR MINUTES.

### NOTICE!

ON TOP MIDDLE OF THE FORM YOU HAVE SEARCH BY MEETING DATE BOX. THAT'S THE DATE OF YOUR MEETING. PLEASE MAKE SURE THAT YOU HAVE OR LOOK FOR THE DATE CORRESPONDENT TO YOUR MEETING DATE THEN BEGIN BY CLICKIN THE ADD BUTTON.

AS YOU CAN SEE THE FORM, YOU HAVE ADD MINUTES, SAVE MINUTES, DELETE MINUTES, SPELL CHECK, DELETE MINUTES, MAIN MENU, PRINT MINUTES AND TREASURE/OFFICER, VISITOR MENUS.
BEFORE STARTING YOUR MINUTES, MAKE SURE THAT YOU CLICK THE ADD BUTTON THEN START TO TYPE YOUR MINUTES.

### NOTICE!

THE PRAYER LED BY BOX IS WHERE YOU TYPE IN THE PERSON WHO LED THE PRAYER. IT IS AN OPTION TO PLACE THE PERSON. BUT, IF YOU SHOOSE TO NOT TYPE A PERSON, PLEASE DO NOT LEAVE IT BLANK. SIMPLY TYPE N/A.

AFTER TYPING AND COMPLETING YOUR MINUTES MAKES SURE THAT YOU SAVE YOUR MINUTES BY CLICKING THE SAVE MINUTES BUTTON. IF YOU NEED TO CORRECT YOUR SPELLING, JUST CLICK THE SPELL CHECK BUTTON. IF YOU WOULD LIKE TO DELELTE YOUR MINUTES, YOU CAN CLICK DELETE BUTTON. IF YOU FIND ANY SPELLING ERRORS, MAKE SURE THAT AFTER YOU MAKE THE CORRECTIONS YOU CLICK THE SAVE BUTTON TO SAVE THE CORRECTIONS SPELLING.

AS YOU NOTICE, THERE IS A BUTTON CALLED THE TREASURE/OFFICE/VISITOR MENUS. BESIDES THE OES SYSTEM MAIN MENU LOGIN FORM, THE MINUTES FORM WORKS AS A SECOND MAIN FORM. THE TREASURE/OFFICE/VISITIOR MENU BUTTON, GIVES YOU ACCESS TO THE REST OF THE FORM SUCH AS THE TREASURE, OFFICERS, AND VISITORS FORM. ONCE CLICKED THE MINUTES FORM WILL CLOSE AND OPEN A MENU FORM SO THAT YOU CAN CHOOSE WHAT TO DO NEXT.

THE PRINT MINUTES FORM IS USED TO PRINT YOUR MINUTES REPORT. YOU WILL HAVE TO CHOOSE THE DATE OF YOUR MEETING TO DISPLAY THE OFFICERS TABLE LOCATED IN THE MIDDLE OF THE PRINT REPORT.

#### NOTICE!

THE MINUTES FORM IS THE ONLY FORM WHERE YOU CAN DELETE THE DATE OF YOUR MEETING. REMEMBER, BEFORE DELETING THE DATE OF THE MEETING YOU NEED TO DELETE ALL RELATED DATA ASSOCIATED TO THE DATE OF THE MEETING. THIS IS VERY IMPORTANT. THE MAIN MENU BUTTON GETS YOU BACK TO THE OES SYSTEM MAIN MENU LOGGIN FORM.



## OES DATA SYSTEM INSTRUCTIONS TREASURER INSTRCTIONS FORM



THIS IS THE TREASURER INSTRUCTIONS FORM. THIS IS WHERE THE SECRETARY WILL ENTER THE TREASURE REPORT FOR THE MONTH OF THE MEETING. THIS IS WHERE THE SECRETARY WILL ENTER THE MEMBER'S NAME AND THE DUES AND OR WHAT OTHER TYPE OF CONSTRIBUTIONS THE MEMBER PAID. THIS FORM HAS BUTTONS MENU WHICH ARE ADD TREASURE, EDIT AND SAVE, DELETE TREASURE, PRINT TREASURE REPORT, FORMS MENU AND MINUTES. AS YOU ALSO NOTICE AT THE BOTTOM RIGHT CORNER YOU WILL SEE A TOTAL PAID WHICH IS THE TOTAL FOR THAT MEETING MONTH.

AS YOU CAN SEE, AT THE TOP OF THE FORM YOU WILL SEE YOUR SEARCH DATE OF MEETING BOX. BEFORE YOU START, MAKE SURE THAT YOU SEARCH FOR THE DESIRE DATE OF THE MEETING. IF YOU SEE NO DATE AT THE BOX, YOU DID NOT ADD AND SAVE A DATE OF THE BEFORE BEGGNING TO WORK. ONCE YOU LOCATE THE DATE, CLICK THE ADD TREASURE BUTTON. ONCE CLICKED, IT WILL CLOSE THE TREASURE FORM AND OPEN THE ADD TREASURE FORM. IN THIS FORM IS WHERE YOU ADD AND SAVE YOUR TREASURE. THE ONLY OPTIONS THAT YOU SEE IN THE ADD TREASURE FORM ARE ADD, SAVE, AND THE TREASURE FORM. TO START ADDING, CLICK ADD, THEN START TO FILL THE FORM.

#### NOTICE!

IF YOU HAVE A HUSBAND AND WIFE AS MEMBERS OF THE CHAPTER, YOU CAN ADD HUSBAND OR WIFE IN THE SISTER OR BROTHER BOX AND OR THE HUSBAND OR WIFE IN THE OTHER CONSTRIBUTOR. ALSO, IN THE CONSTRIBUTION DESCRIPTION YOU CAN CHOOSE THE DESIRE DESCRIPTION AND THEN BY PRESSING THE SPACE BAR YOU CAN TYPE ADDITIONAL DESCRIPTION IF YOU HAVE A MEMBER PAYING DUES AND OR OTHER PAYMENTS TO THE CHAPTER. I.G. IF YOU HAVE A MEMBER THAT PAID DUES AND GIVING DONATIONS, YOU CAN CHOOSE DUES AND THEN MANUALLY TYPE DONATION IN THE SAME BOX. YOU CAN ALSO DO IT IF YOU HAVE HUSBAND AND WIFE AS MEMBERS, I.G. HUSBAND PLACED IN THE SISTER OR BROTHER BOX. AND WIFE PLACED IN THE OTHER CONSTRIBUTOR BOX, SO, LET'S SAY THAT HUSBAND PAYED DUES AND WIFE DONATED MONEY, YOU CAN CHOOSE DUES THEN TYPE DONATION IN THE CONSTRIBUTION BOX. THE QUANTITY TYPE SHOULD BE AS FOLLOWED, IF YOU HAVE A MEMBER PAYING JUST DUES, THEN TYPE 1 AND IF THE MEMBER PAYED DUES AND OTHER CONSTRIBUTIONS, THEN TYPE 2 AND SO ON.

MAKE SURE THAT THE DATE TO TREASURE MATCHES THE DATE OF THE MEETING. THIS IS WHERE THE SECRETARY GIVE THE TREASURER ALL MONEYS PAID TO THE CHAPTER. YOU WILL NOT BE DELETING AND EDITING ANY TREASURE INFORMATION FROM THE ADD TREASURE FORM. EDITING, SAVING AND DELETING WILL BE DONE AT THE MAIN TREASURE FORM. ALSO MAKE SURE THAT YOU ONLY ENTER ONE TREASURE INFORMATION AT TIME. ONCE YOU CLICK THE SAVE BUTTON, THE ADD TREASURE FORM WILL CLOSE AND REOPEN THE MAIN TREASURE FORM. IF YOU WANT TO ADD MORE TREASURE INFORMATION, REPEAT THE SAME PROSCESS, MAKE SURE YOU RMEMBER TO CHOOSE THE DATE OF THE MEETING.

TO EDIT, SAVE, AND DELETE TREASURE INFORMATION, FIRST CHOOSE WICH TREASURE INFORMATION YOU WANT TO EDIT IN THE TREASURE TABLE, THEN AFTER MAKING THE NECESSARY CORRECTIONS, CLICK THE EDIT AND SAVE BUTTON. THAT WILL SAVE YOUR EDITED CORRECTIONS. THE TREASURE NAVIGATION IS FOR YOU TO NAVIGATE THROUGHT THE TREASURE TABLE.

### NOTICE!

BY CLICKING DELETE, YOU WILL BE DELETING THE SPECIFIC TREASURE INFORMATION IN THE ROW OF THE TREAUSRE TABLE. BY CLICKING THE DELETE BUTTON, IT WILL ONLY DELETE ONE TREASURE INFORMATION AT A TIME.

THE FORMS MENU BUTTON IS THE SAME AS THE OTHER FORMS WHERE IT HAS THE SAME BUTTON. THIS BUTTON IS TO GET YOU BACK TO THE MENU FORMS WHERE YOU CHOOSE WHICH ACTIVITY YOU WOULD LIKE TO DO NEXT. THE MINUTES BUTTON, WILL GET YOU BACK THE MINUTES FORM.



## OES DATA SYSTEM INSTRUCTIONS OFFICER INSTRUCTIONS FORM



THIS IS THE OFFICER INSTRCTIONS FORM. LIKE ANY OTHER FORM, YOU SEE YOUR BASIC MENUS FOR YOU TO WORK WITH. THE ADD ROLL CALL BUTTON WILL CLOSE THE OFFICERS ROLL CALL FORM AND OPEN THE ADD OFFICERS ROLL CALL FORM. AGAIN, THE ADD ROLL CALL OFFICERS FORM IS JUST TO ADD ROLL CALL OF OFFICERS. MAKE SURE THAT IN THE ADD ROLL CALL OFFICERS YOU CHOOSE THE DATE OF THE MEETING. THE ADD ROLL CALL OF OFFICERS FORM IS SIMPLE TO USE. ONCE YOU CLICK THE ADD BUTTON YOU WILL ADD AN OFFICER AND AS LONG AS YOU ARE IN THE SAME DATE OF MEETING YOU CAN KEEP ADDING AN OFFICER BY CLICKING ADD BUTTON THEN CLICK SAVE ONCE FINISH. ONCE YOU CLICK THE SAVE BUTTON IT WILL CLOSE THE ADD ROLL CALL OF OFFICERS AND REOPEN THE OFFICERS ROLL CALL FORM.

REMEMBER, IF YOU WOULD LIKE TO EDIT AND SAVE OFFICERS FOR CORRECTIONS, YOU DO THIS IN THE OFFICERS ROLL CALL FORM. JUST GO TO THE OFFICER ROLL CALL TABLE AND CLICK IN THE OFFICER YOU WOULD LIKE TO EDIT AND THEN CLICK THE EDIT SAVE BUTTON TO SAVE THE CORRECTIONS.

### NOTICE!

UNLIKE THE REST OF THE FORM, THIS FORM DOESN'T HAVE THE PRINT REPORT. YOUR OFFICERS ROLL CALL, ONCE SAVED, THEY ARE ADDED TO YOUR MINUTES REPORT. JUST MAKE SURE THAT WHEN YOU PRINT THE MINUTES REPORT YOU CHOOSE THE DATE OF THE MEETING IN THE PRINTING FORM TO SHOW THE OFFICERS.

JUST LIKE ANYOTHER FORM, YOU HAVE YOUR FORM MENU THAT WILL GET YOU BACK TO THE FORMS MENU SO THAT YOU CAN CHOOSE WHAT ACTIVITY TO DO NEXT. YOU ALSO HAVE THE MINUTES FORM TO GET YOU BACK TO THE MINUTES FORMS.

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THIS IS THE VISITOR INSTRCUTIONS FORM. THE VISITOR FORM IS SIMPLE TO USE AND FOLLOW. IT IS AN OPTION FOR THIS FORM TO BE USED SINCE IS ONLY TO KEEP TRACK OF THE VISITORS.

JUST LIKE ANY OTHER FORM, THIS FORM HAS THE ADD VISITORS, EDIT AND SAVE, DELETE VISITOR, PRINT VISITOR REPORT, FORMS MENU, AND MINUTES BUTTONS. TO ADD VISITORS JUST CLICK THE ADD VISITORS BUTTON. ONCE CLICKED THE VISITORS FORM WILL CLOSE AND OPEN THE ADD VISITORS FORM. BEFROE ADDING VISITORS, MAKE SURE THAT YOU SEARCH THE DATE OF MEETING FOR THAT SPECIFIC DATE OF MEETING.

AS LONG AS YOU IN THE DATE OF THE MEETING, YOU CAN CLICK THE ADD BUTTON TO ADD A VISITORS ONCE THE FIRST VISITORS IS ENTERED, YOU CAN KEEP ADDING MORE BY CLICKING ADD. ONCE YOU FINISH ADDING VISITORS, YOU CAN CLICK SAVE. BY CLICKING THE SAVE BUTTON, YOUR VISITORS WILL BE SAVED, THE ADD VISITORS FORM WILL CLOSE, AND REOPEN THE VISITORS FORM.

### NOTICE!

YOU CAN NOT DELETE VISITORS FORM THE ADD VISITORS FORM. EDIT, SAVING, AND DELETING VISITORS ARE DONE IN THE VISITORS FORM.

WHEN YOU HAVE VISITORS SAVED, THEY WILL APPEAR IN THE VISITORS TABLE IN THE VISITOR FORM. YOU CAN CHOOSE A VISITOR IN THE TABLE ROWS TO EDIT, SAVE, AND DELETE. IF YOU HAVE TO MAKE CORRECTIONS SIMPLY CHOOSE A VISITOR, DOULBE CLICK, MAKE CORRECTIONS THEN CLICK THE EDIT AND SAVE BUTTON. BY CLICKING THE SAVE AND EDIT BUTTON WILL SAVE YOUR CORRECTIONS. IF YOU WOULD LIKE TO DELETE A VISITOR, SIMPLY CLICK THE DELETE BUTTON. YOU CAN ONLY DELETE ONE VISITOR AT TIME.

THE PRINT VISITOR REPORT ALLOWS YOU TO PRINT THE VISITOR REPORT FOR YOUR RECORDS. THE FORMS MENU WILL GET YOU BACK TO THE MENU SO THAT YOU CAN CHOOSE WHICH ACTIVITY WOULD YOU LIKE TO DO NEXT. THE MINUTES BUTTON WILL GET YOU BACK TO THE MINUTES.

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# OES DATA SYSTEM INSTRUCTIONS MISCELLANEOUS



### KEY CHORT CUTS

- 1. TO COPY CLICK CTR + C
- 2. TO PASTE CLICK CTR +V
- 3. TO CUT CLICK CTR+X
- 4. CLICK ATL+M FOR MEMBER FORM
- 5. CLICK ALT+N FOR MINUTES FORM
- 6. CLICK ALT+D FOR ADMINISTRATOR
- 7. CLICK ALT+A FOR ADD DATE
- 8. CLICK ALT+O FOR OES DATA INSTRUCTIONS
- 9. TO MOVE FROM ONE TEXT BOX TO THE OTHER CLICK THE TAB BUTTON
- 10. TO EDIT DATA IN ANY TABLE DATA, DOUBLE CLICK THE DATA YOU WOULD LIKE TO CHANGE THEN CLICK SAVE BUTTON
- 11. REMEMBER TO SAVE YOUR WORK BEFORE LOGGIN OUT
- 12. BEFORE BEGGINING TO DO AN ACTIVITY, ADD A DATE IN THE MAIN MENU FORM
- 13. TO ADD USER NAME AND PASSWORD OR DELETE FOR AN ADMINISTRATOR, GO TO THE ADMINISTRATOR MENU.

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