



# **OASYS III Users' Guide**

## **Version 1.6**





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# 1 Installation of OASYS III

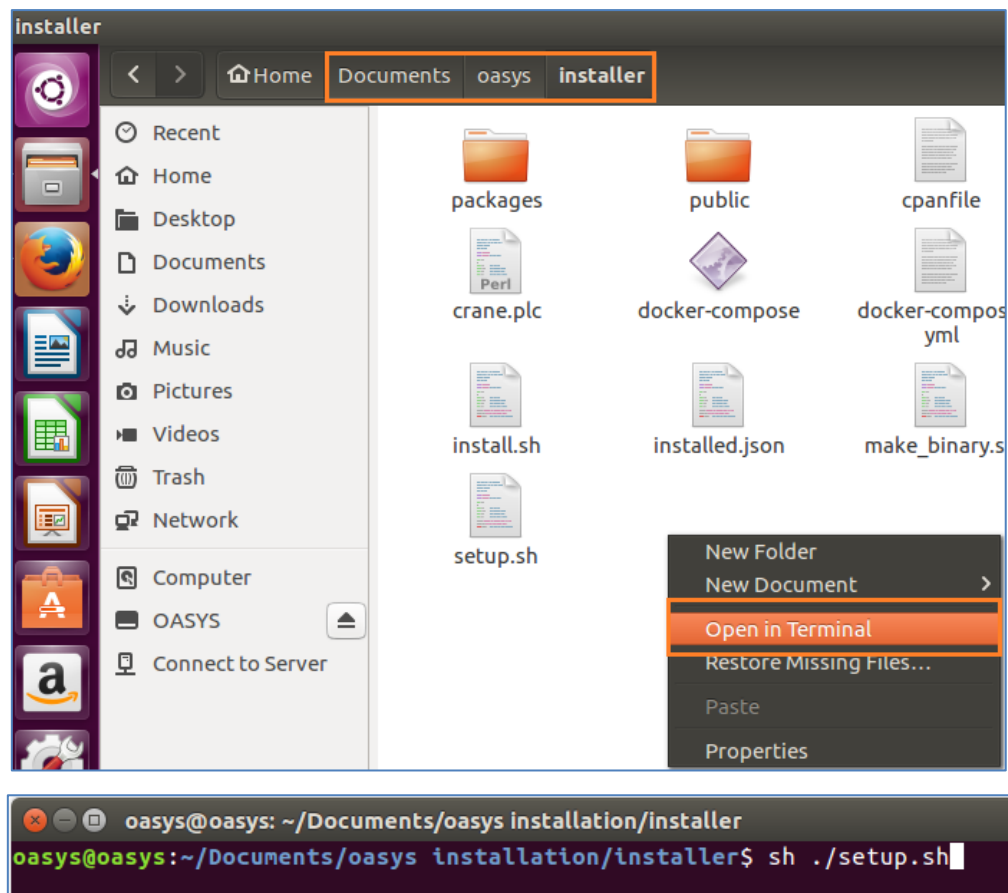
## 1.1 Installation OASYS III base version

To install OASYS III, it is required to set up an Ubuntu 16.04 LTS server. Please contact Jens Gassmann (please refer to [chapter 12](#) for contact information) in case you need technical support for the set up.

**Note:** the user has to be named “oasys” and the folder, where OASYS III is installed has to be named “oasys”.

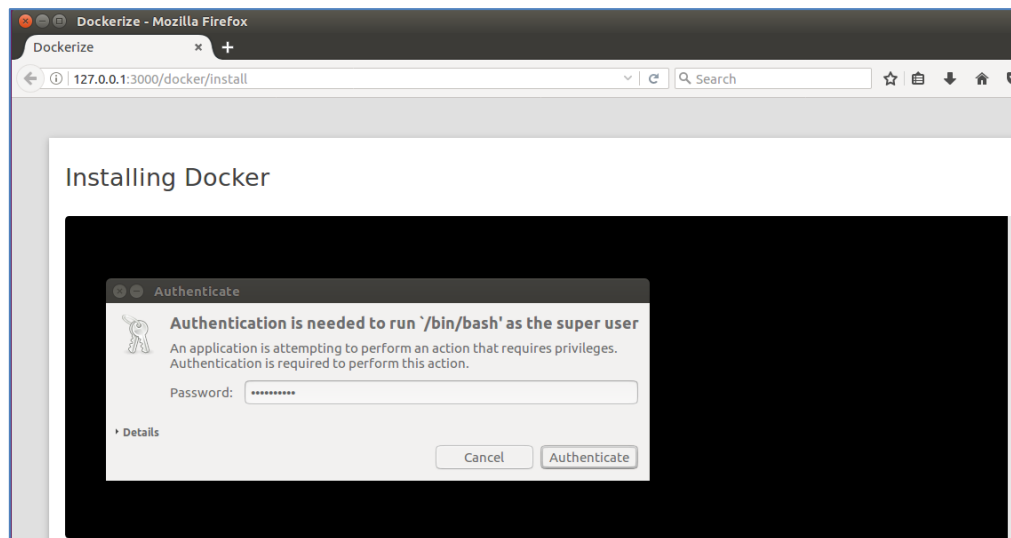
Once the server is prepared, you have to complete the following steps to install OASYS III:

1. Download the installation package to a USB stick (please contact the technical support for the latest version of the installation package).
2. Copy the package from the USB stick to the server
3. Unpack the installation package in the desired directory on the server
4. Open a terminal and enter the command `sh ./setup.sh` (right click in the folder where the installation package has been unpacked) → this step starts the browser with the OASYS III installer

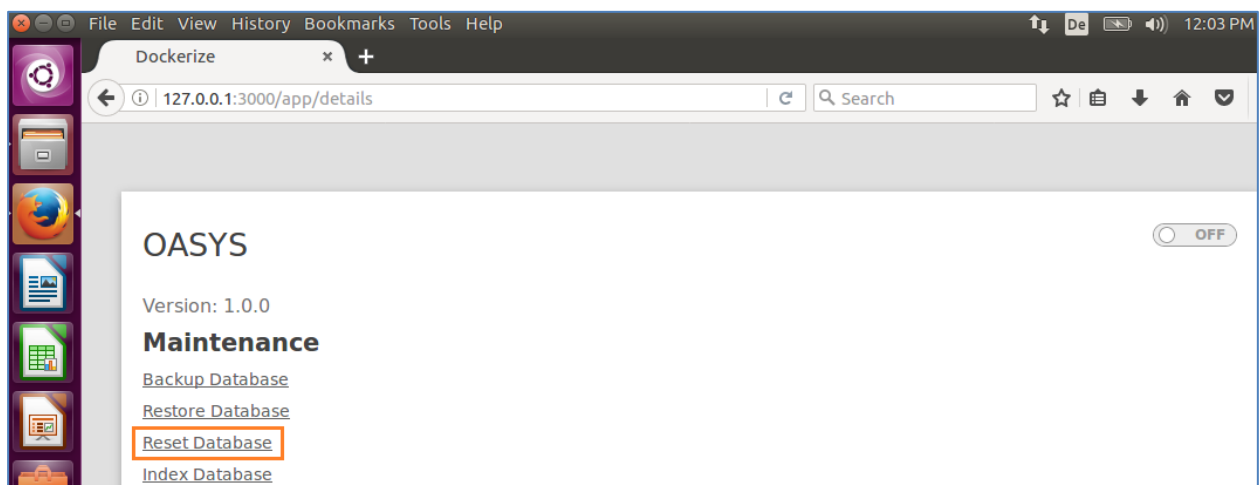




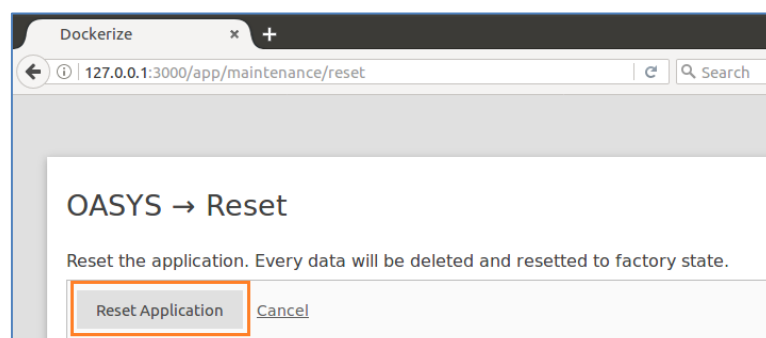
5. Enter the password to start the installer:



Follow the steps as indicated by the installer until the following windows opens:



Choose reset database and click on "Reset Application":



OASYS III can now be accessed with the IP-address of the Server with Port 62797  
<http://ip.of.the.server:62797>

Admin user credentials:

E-Mail: admin@oasys.network

Password: oasysadmin



## 1.2 Update to newest OASYS III version

To update the installation to the newest available version you have to complete the following steps:

1. Load the image from the sever:

open a terminal in the folder where oasys has been installed and enter the following commands:

```
docker-compose pull
```

**Note:** this step can take several hours depending on the available internet connection.

2. Restart OASYS: open a terminal in the oasys installation folder and enter the following command:

```
docker-compose up -d
```

Alternatively, you can download the newest image:

1. Load the newest image unto a USB-Stick (please contact the technical support for the latest version of the installation package)
2. Copy the installation package from the USB stick to the server
3. Unpack the installation package in the desired directory
4. Open a terminal in the folder where the image has been unpacked and enter the following command:

```
docker load --input installer/image.tar
```

5. Restart OASYS: open a terminal in the oasys installation folder and enter the following command:

```
docker-compose up -d
```



## 2 Logging into OASYS III

To log into OASYS III you need a user name and password:

Sign in

E-Mail

Password

Remember me ☐ Logout after a week of inactivity.

Login [forgotten Password](#)

Forgotten Password

Already registered User, can [reset their Password](#) via E-Mail.

If you forget the password, a new one can be generated by "reset their Password" or "forgotten Password".

### 2.1 Structure of the system

The OASYS system consists of two main parts:

On the left, you can access different sections of the main menu

The dashboard shows an overview of the unit structure and selected reports

OASYS III

1.6.4 / 20.09.2017

- Dashboard
- Members
- Units
- Statistics
- Finance
- Reports
- Support
- Clients
- FAVORITES
- Add Member
- Add Unit
- Add Event Stats
- Add Event Acts

Administrator, Admin Profile Jobs Translation Backup / Restore Logout Last Targets French English

Dashboard

Selection

- NAKI
  - District Church Barrus
    - Apostle District Rieber
    - Apostle District Stromer

Details [District Church Barrus](#)

Total Members	2.359
Total active Ministers	885
Total Apostle Districts	2
Total Districts	20
Total Congregations	208

Member and Minister Reports

- [Member Report \(active, sealings, death\)](#)
- [Minister Change Report](#)

Unit Reports

- [Congregation Profile](#)

Analysis / Control Reports regarding Attendance / Offering

- [Attendance Trend](#)

### 2.2 Languages in OASYS III

OASYS III provides English and French interfaces. You can easily switch to the desired language. The language can be selected in the upper right corner of the screen:

Administrator, Admin Jobs Profile Translation Backup / Restore Logout Last Targets

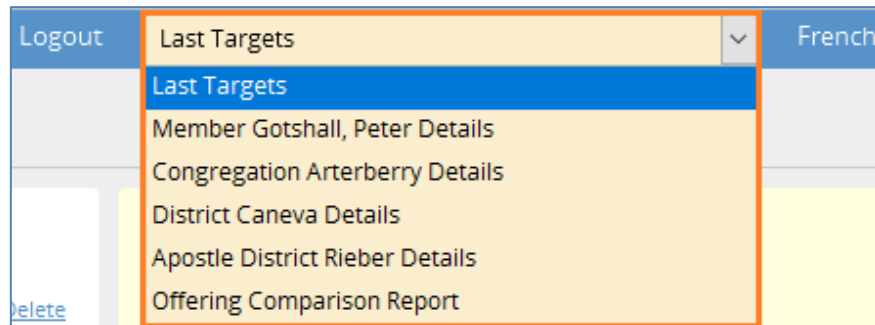
French
English





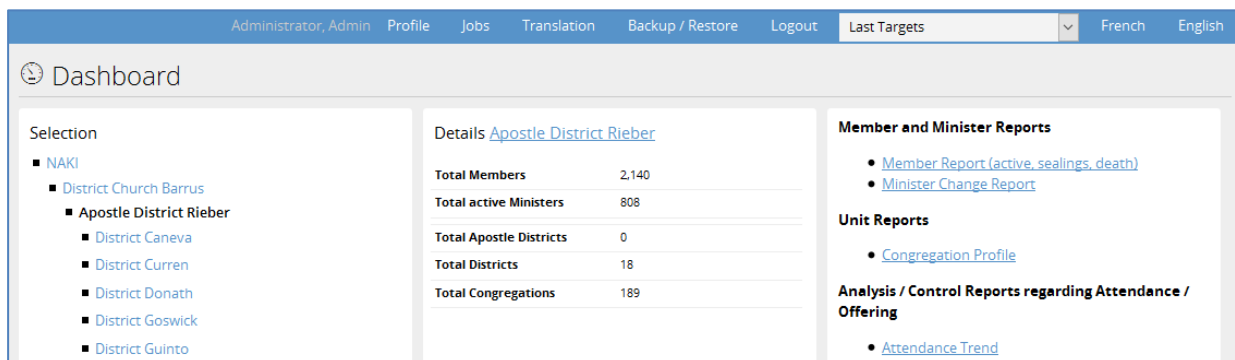
## 2.3 Last Targets

In the “Last Targets” section, the most recent actions can easily be recalled:



## 2.4 Dashboard

After you log into the system, the dashboard opens:



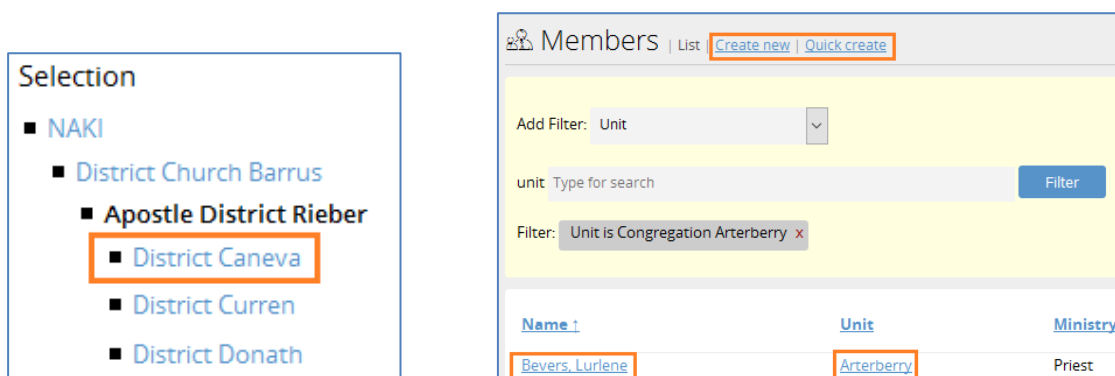
On the left, the structure of the Local Church is visible.  
With a mouse click, you can open each District and its sub units.

Once you have selected a district, you can find further details in the middle section.

On the right, the main reports of OASYS III are listed.  
For further information about reports, please refer to [chapter 11](#).

## 2.5 Links in the interface

In the whole interface of OASYS you will find links which facilitate an easy access to different items, for example units or members. Links are marked in a pale blue colour:





### 3 Getting OASYS III started

#### 3.1 Necessary data from the field to use OASYS

Every Local Church decides which data is entered and maintained in their OASYS III installation.

Nevertheless, for the yearly worldwide membership reporting to NACI, the following data has to be provided:

##### 1) Member data

<i>Members previous period (data from NACI database)</i>
+ Sealings (data input from Local Church) <ul style="list-style-type: none"> <li>Below 14 years</li> <li>Above 14 years</li> </ul>
- Deceased (calculated according to death rate (source World Bank), based on number of members previous period in NACI database)
+/- Manual corrections (data input from Local Church) → comment is mandatory
<i>Calculated number of members of reporting period (current period)</i>

2) **Minister data:** according to existing minister structure, including ministers which are on a leave of absence (LOA)

3) **Congregation and building data:**

Congregations
thereof in <ul style="list-style-type: none"> <li>a building owned by the church</li> <li>a rented place</li> <li>another gathering place</li> </ul>

4) **Attendance:** average attendance in the main weekly service without guests (members which are not sealed)

#### 3.2 Data import

Before importing any data into OASYS III, it is important that you check if the standard client settings and master data are set correctly for the client where the data will be imported.

There are two options for data import:

- ✓ Direct import from data of a former OASYS I database
- ✓ Import of data from excel sheets

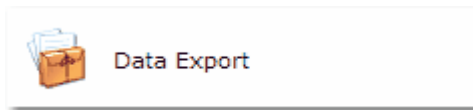
##### 3.2.1 Preparation for data import from OASYS I

In order to import data from OASYS I, you need a ZIP export file of the OASYS I database.

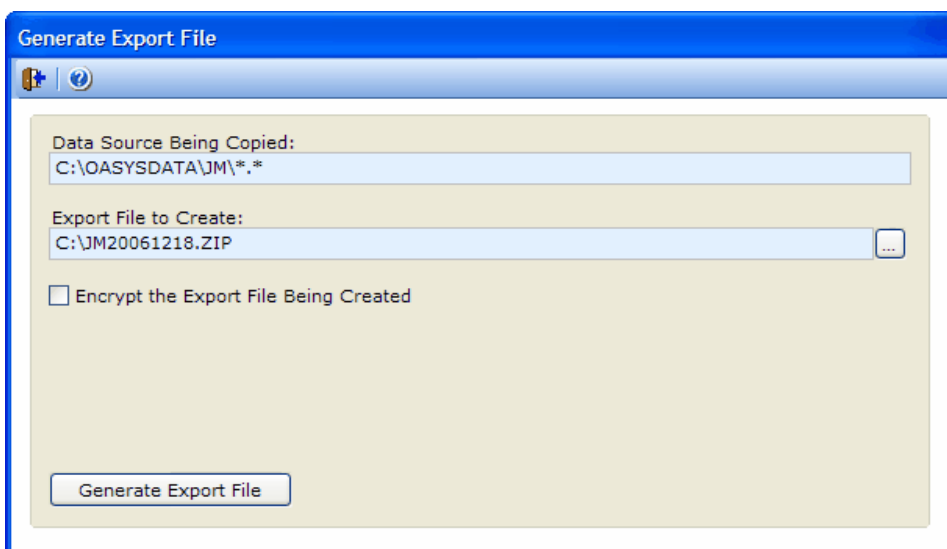
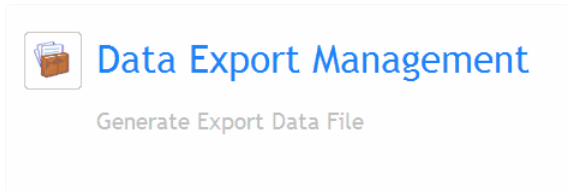


## Side note: how to export the database from OASYS I

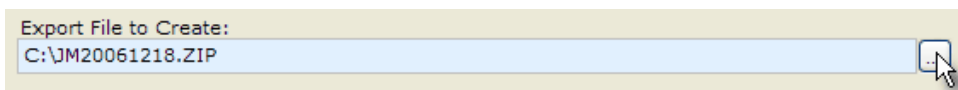
Click on the Data Export Module:



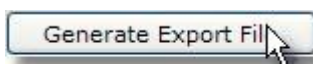
Click on the Generate Export Data File option:



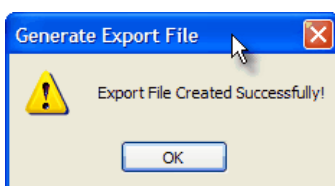
On the Export File to Create option, you may specify where to create the file.



Finally, click on the Generate Export File command button. This will create a compressed file containing the selected country's database.



As soon as the compressed data file is completed, you will receive a notification. Click on the OK command button to close the message and conclude the Export data option.





### 3.2.2 Preparation for data import from Excel sheets

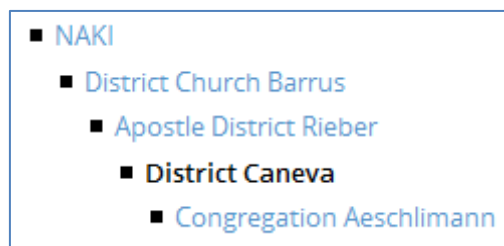
If you import data from Excel sheets, the units have to be imported as a first step. After that, the member data can be imported.

#### 3.2.2.1 Unit Data

The unit type is defined by the length of the ID number. The number itself is a tree, with which the parent units are identified. Therefore the ID numbers need to have the following format and must be unique:

Type	Number of characters	Example
Apostle District	2 characters	19
District	5 characters	19079
Congregation	7 characters	1907907

Units will be imported as subunits from NAKI (International Church), which is the root of the unit tree in every client:



**Note:** the first row in the Excel import file has to be empty!

If your unit tree has more unit types than specified in the example, as for example a Sub-District or region, please contact the technical support (refer to [chapter 12](#)) in order to define the correct format for the import file.

#### 3.2.2.2 Member Data

You can import member data after the units have been imported to the client.

We distinguish between mandatory and optional member information for the import.

##### Mandatory data:

- ✓ CONGCODE: Integer (refer to [chapter 3.2.2.1](#)) (Congregation ID)
- ✓ SURNAME: Chars
- ✓ FIRST\_NAME: Chars
- ✓ BORN\_ON: date with format dd.mm.yyyy or dd/mm/yyyy
- ✓ SEX: M or F
- ✓ ISO\_CODE 2: official ISO ALPHA2 Code (Exp. ZM for Zambia)
- ✓ M\_SHIPNO: Chars (Member ID)



Example:

CONGCODE	ISO_CODE	M_SHIPNO	SURNAME	FIRST_NAME	BORN_ON	SEX
1109701	ZM	078-02714	MUELLER	HEINZ	01.01.1964	M

**Optional data:**

- ✓ MIN\_CODE: the congregation stated in CONGCODE is set as working area
- ✓ CONTACTNO: Chars
- ✓ DIED\_AT: date dd.mm.yyyy or dd/mm/yyyy
- ✓ RESADDR: Chars
- ✓ SEALED\_ON: date dd.mm.yyyy or dd/mm/yyyy
- ✓ SEALED\_PLACE: Chars
- ✓ SEALED\_BY: Chars
- ✓ BAPT\_ON: date dd.mm.yyyy or dd/mm/yyyy
- ✓ BAPT\_PLACE: Chars
- ✓ BAPT\_BY: Chars

Matching table for MIN\_CODE:

ID	Ministry
1	District Apostle
2	District Apostle Helper
3	Apostle
4	Bishop
5	District Elder
6	District Evangelist
7	Shepherd
8	Evangelist
9	Priest
10	Deacon
11	Sub Deacon

Example:

MIN_CODE	CONTACTNO	DIED_AT	RESADDR	SEALED_ON	SEALED_BY
10	+1 234 56 7		DUISBURGER STRASSE 74	01.03.1999	HEINRICH MÜLLER

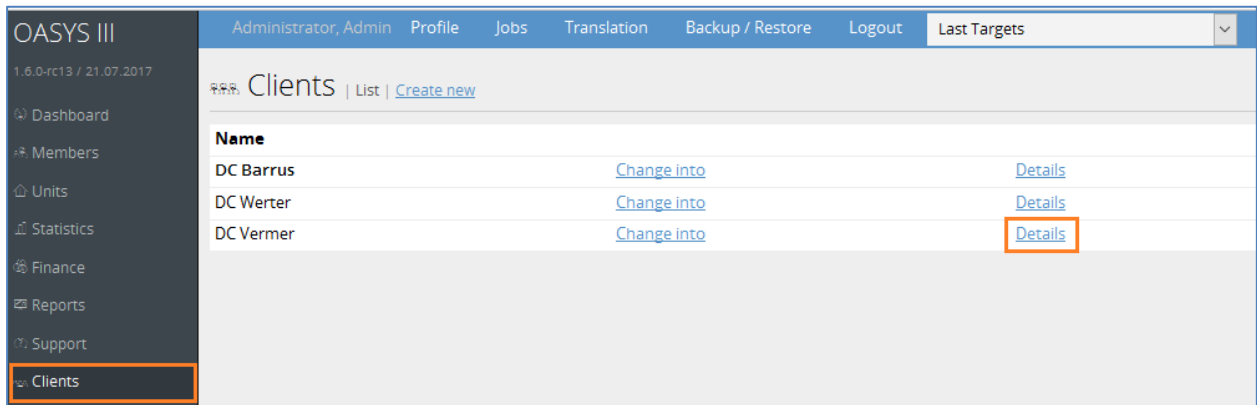
SEALED_PLACE	BAPT_ON	BAPT_BY	BAPT_PLACE
FIRST CHURCH OF RHINELAND	15.07.1999	HEINRICH MÜLLER	FIRST CHURCH OF RHINELAND



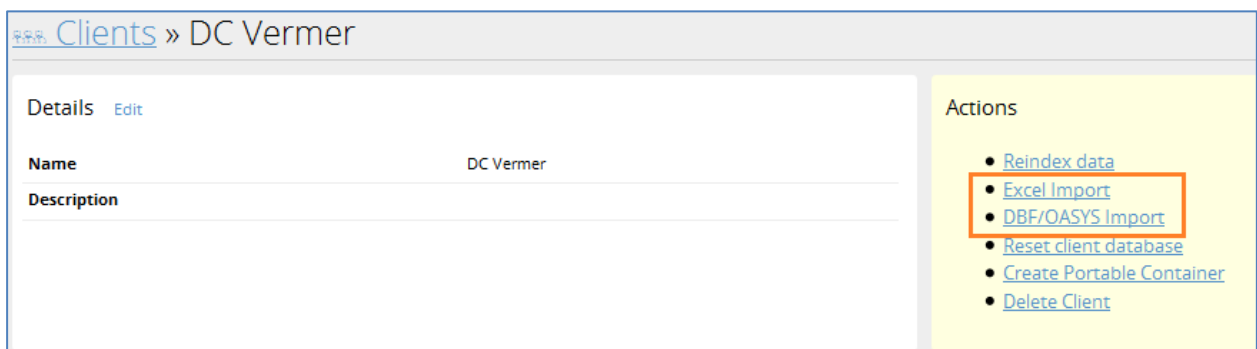
### 3.2.3 How to import data into OASYS III

Once the data to import is ready, you can import the data into OASYS III.

To do so open the client, for which the data is imported:

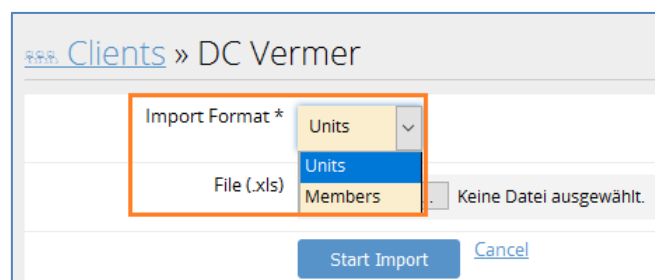


Choose the corresponding import type in the “Actions” section:

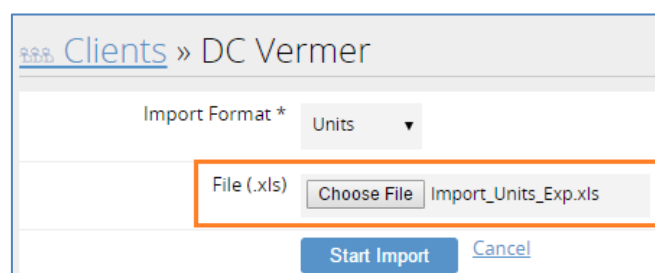


#### 3.2.3.1 Excel Import

To import data (unit or member data) from an Excel file, choose the correct import format for the Excel to upload:



Choose the Excel file to upload data and start the import by clicking on “Start Import”.



**Note:** before members can be imported, the units have to be imported in a first step.



The system now starts the import job:

Jobs					
ID	Job	Description	Create Time	State	Results
#1716	Unit Excel Import	Import given Unit Excel Sheet into Client DC Vermer	24.07.2017 06:36	done	<a href="#">Download</a>

Once the job is finished, the state will change to “done”.

To control, if the import has been successful, click on “Download”.

**If the import was successful:**

In case there has been a problem with the import, the system will indicate the invalid import items in red:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	CONGCODE	ISO_CODE	M_SHIPNO	SURNAME	FIRST_NAME	BORN_ON	SEX	MIN_CODE	BAPT_ON	BAPT_BY	BAPT_PLACE	SEALED_ON	SEALED_BY	SEALED_PLACE	CONTACTNO	DIED_AT	RESADDR
2	1105703	ZM	078-00011	DOE	SYLVIA	09/05/1987	F		19/06/1987	HEINRICH MÜLLER		12/10/1987	HEINRICH MÜLLER				TEPEWEG 3

**Note:** after the import has been completed, the data has to be indexed. Please refer to [chapter 4.7.1](#) for instructions.

### 3.2.3.2 DBF/OASYS I Import

Select this import option to import data from an existing OASYS I database.

DBF Import

File (.zip)  Werter.ZIP

Unit Type for Workareas

Unit Type for Sub Districts

Unit Type for Congregations

[Cancel](#)

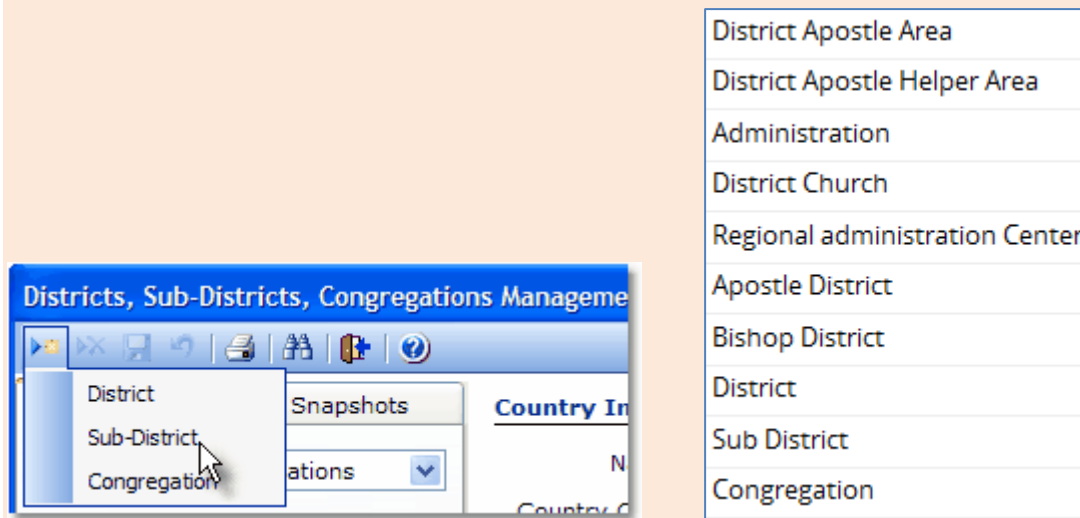
Select the corresponding .ZIP database for the import and indicate which unit type of the existing OASYS I database corresponds with the following unit types in OASYS III:

- ✓ Unit type for “Work Area” (Apostle District): in general “District”
- ✓ Unit type for sub district: in general “Sub District”
- ✓ Unit type for congregations: in general “Congregation”

Start the import by clicking on “Start Import”.



In order to import the data, the unit structure of the OASYS I database has to be adapted to the unit structure of OASYS III:



After a successful data import, the system automatically indexes the data to make the data usable for the reports (please refer to [chapter 4.7.1](#)).

Jobs					
ID	Job	Description	Create Time	State	Results
#1723	Reindexing Events	Indexing Events for Report Usage	24.07.2017 10:48	progress	
#1722	Reindexing Ministers	Index Ministers for Report Usage	24.07.2017 10:48	done	<a href="#">Download</a>
#1721	Reindexing Members	Index Members for Report Usage	24.07.2017 10:48	done	<a href="#">Download</a>
#1720	Reindexing Member Fulltext	Reindexing the Member Search Index	24.07.2017 10:48	done	<a href="#">Download</a>
#1719	DBF Database Import	Import a DBF Database into Client DC Werter	24.07.2017 10:48	done	<a href="#">Download</a>

### 3.3 Building up a new system without data import

In case there is no data available, the initial blank database looks as follows:

Dashboard

Selection

- NAKI
- Special Transfers

Details [International Church NAKI](#)

Total Members	0
Total active Ministers	0
Total Apostle Districts	0
Total Districts	0
Total Congregations	0

Member and Minister Reports

Unit Reports

- [Congregation Profile](#)

Analysis / Control Reports regarding Attendance / Offering

- [Attendance Trend](#)

In order to fill the empty database with data, we recommend the following steps to get started:

- 1) Configure the client settings and master data according to the needs (for instructions, please refer to [chapter 4](#))





- 2) Start creating the unit tree from top down: from District Apostle Area down to Congregation level (for instructions, please refer to [chapter 6](#))

**Recommendation:** in order to create the unit tree in an efficient way, we recommend creating a Unit Import Excel file as specified in [chapter 3.2.2.1](#)

- 3) Start to create the membership database by recording members (for instructions, please refer to [chapter 5](#))

**Recommendation:** in order to create members in an efficient way, we recommend to use the “Quick create” function (chapter 4.2.1) or creating a Member Import Excel file as specified in [chapter 3.2.2.2](#)



## 4 Client Management (System Configuration)

We recommend setting up a client per Local Church since configurations such as the local currency for offerings, date format, length of voucher numbers etc. are set at client level.

You can access the client management by clicking on “Clients” in the main menu:

OASYS III  
1.6.0-rc13 / 21.07.2017

Administrator, Admin Profile Jobs Translation Backup / Restore Logout Last Targets

Clients | List | [Create new](#)

Name		
DC Barrus	<a href="#">Change into</a>	<a href="#">Details</a>
DC Werter	<a href="#">Change into</a>	<a href="#">Details</a>
DC Vermier	<a href="#">Change into</a>	<a href="#">Details</a>

To switch between the different clients, click on “**Change into**”.

To edit the client settings, click on “**Details**”.

For every client, you can manage the following information/actions:

Clients » DC Barrus

Details [Edit](#)

Name DC Barrus

Description

Actions

- [Reindex data](#)
- [Excel Import](#)
- [DBF/OASYS Import](#)
- [Reset client database](#)
- [Create Portable Container](#)
- [Delete Client](#)

Masterdata

[Change and customize](#) the available options and types for this client

Commission management

[Manage](#) the permissions for the commissions

Report management

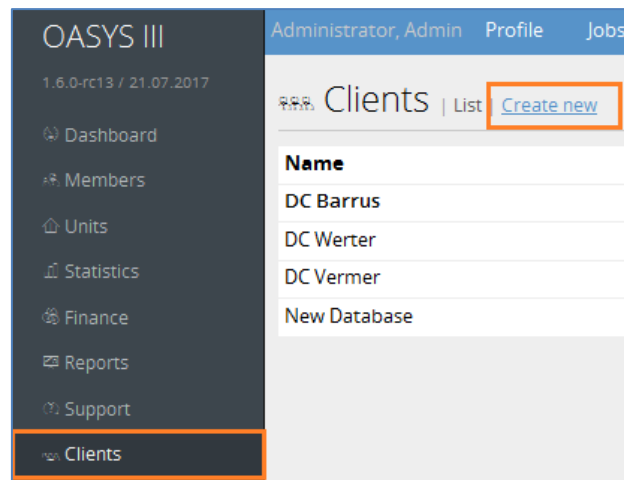
[Manage](#) the available reports this client

- ✓ Details (refer to [chapter 4.2](#))
- ✓ Master data settings (refer to [chapter 4.3](#)) → pay special attention to set the correct currency
- ✓ Commission (and assigned permissions) settings (refer to [chapter 4.5](#))
- ✓ Report Management settings (refer to [chapter 4.6](#))
- ✓ Actions regarding system administrative purposes (refer to [chapter 4.7](#))



## 4.1 Create a new client

To create a new client, open “Clients” and click on “Create new”:



The following window opens:

Create new Client

Name

Masterdata
DC Barrus

Enter the name of the new client and select the master data from an existing client for the new client.

For the new client, the following configuration will be set according to the chosen client:

- ✓ Client Settings (refer to [chapter 4.2](#))
- ✓ Master data settings (refer to [chapter 4.3](#)) → pay special attention to set the correct currency
- ✓ Commission (and assigned permissions) settings (refer to [chapter 4.5](#))
- ✓ Report Management settings (refer to [chapter 4.6](#))

Make sure to adjust these settings according to the needs of the new client.

This step is very important before you start filling the client database with data (via data import from an old system or manually).

Normally “Client” equals a “Local Church”, since a lot of “country based” data is configured at this level (as for example the local currency).



## 4.2 Client Setting Configuration

To adjust client settings, choose the corresponding client and click on “Edit”:

Details	<a href="#">Edit</a>
Name	DC Werter
Description	

### 4.2.1 Name and date / time format

It is possible to change the name of the client:

Edit Client	
Name	DC Vermier

Save the changes by clicking on “Update Client” at the end of the dialog:

<a href="#">Update Client</a>	<a href="#">Cancel</a>
-------------------------------	------------------------

Choose the date and time format according to the needs of the Local Church:

<p>Internationalisation</p> <p>Date Format</p> <p>YYYY-MM-DD</p> <p>YYYY-MM-DD</p> <p>YYYY/MM/DD</p> <p>DD.MM.YYYY</p> <p>DD/MM/YYYY</p> <p><a href="#">Cancel</a></p>	<p>Internationalisation</p> <p>Date Format</p> <p>YYYY-MM-DD</p> <p>Time Format</p> <p>HH:MM</p> <p>HH:MM</p> <p>HH:MM:SS</p> <p>HH:MM:SS AM/PM</p>
--	---

### 4.2.2 Settings for event data entry

<p>Visibility</p> <p><input type="checkbox"/> Capture total manually</p> <p><input checked="" type="checkbox"/> Capture Adults</p> <p><input checked="" type="checkbox"/> Capture Children</p> <p><input checked="" type="checkbox"/> Capture other total visitors manually</p> <p><input checked="" type="checkbox"/> Allow foreign currency for financial data</p> <p><input checked="" type="checkbox"/> Capture officiant Member for Divine Service</p> <p><input type="checkbox"/> Capture Event Acts for Divine Service</p> <p><input checked="" type="checkbox"/> Show event history in Event creation form</p> <p><input checked="" type="checkbox"/> Enable event Quick entry checkbox</p>	<p>Vouchers</p> <p><input checked="" type="checkbox"/> Create Events without voucher range for unit</p> <p><input checked="" type="checkbox"/> Capture Event Type</p> <p><input checked="" type="checkbox"/> Validate if event time matches</p> <p>Length of the fixed part of a voucher Number 3</p> <p>Total length of a voucher number 10</p> <p>Warn Level Offer Value 1000</p> <p>Warn Level Attendance Value 500</p> <p>Warn Level Guest Value 10 %</p>
---	---

Changes to these settings will affect the data entry form for event data (event statistics).

You have to adjust these settings to the needs of the Local Church and the data entry forms in use.



Example of a data entry voucher and the necessary adaption to the client setting:

<b>Altar Slip</b> No. <b>106-560820</b>		<input type="checkbox"/> Capture total manually
Congregation : ..... District : ..... Date : .....		<input checked="" type="checkbox"/> Capture Adults <input checked="" type="checkbox"/> Capture Children <input checked="" type="checkbox"/> Capture other total visitors manually
<b>Type of Service: (Please tick)</b> <input checked="" type="checkbox"/>		<input type="checkbox"/> Allow foreign currency for financial data
<input type="checkbox"/> Sunday <input type="checkbox"/> Mid-week <input type="checkbox"/> Wedding <input type="checkbox"/> Funeral <input type="checkbox"/> Other (specify) .....		<input checked="" type="checkbox"/> Capture officiant Member for Divine Service
<b>Offering:</b> <b>K</b>		<input type="checkbox"/> Capture Event Acts for Divine Service
OFFERING TOTAL IN WORDS: .....		<input checked="" type="checkbox"/> Show event history in Event creation form
ATTENDANCE: <input type="checkbox"/> ADULTS <input type="checkbox"/> CHILDREN <input type="checkbox"/> GUESTS <input type="checkbox"/> TOTAL		<input checked="" type="checkbox"/> Enable event Quick entry checkbox
OFFICIANT NRC No.: .....		<b>Vouchers</b> <input type="checkbox"/> Create Events without voucher range for unit
Name: ..... Signature: .....		<input checked="" type="checkbox"/> Capture Event Type <input checked="" type="checkbox"/> Validate if event time matches
		Length of the fixed part of a voucher Number 3
		Total length of a voucher number 10
		Warn Level Offer Value 1000
		Warn Level Attendance Value 500
		Warn Level Guest Value 10 %

With these settings, the data entry mask for events looks like this:

Add Event Statistics	
Congregation *	Type for search
Event Date *	2017 - 07 - 26
Event Type *	Please select
Offering *	USD
Total attendance *	0
Adults	0
Children	0
Guests	0
Officiant	Type for search
Voucher No. *	
<input checked="" type="checkbox"/> Add another event	
Save Event Statistics Cancel	



## Best-Practice:

- ✓ If you want to enter adults, children and guests, we recommend unticking “Capture total manually”, the calculated total can then be used as a control figure while entering data. In case only total attendance and guests are entered, “Capture total manually” must be ticked in order to be able to enter data;
- ✓ Capture other total visitors (Guests) should always be ticked, since this data is mandatory for the worldwide NAC membership reporting;
- ✓ If you want to enter foreign currency offerings, the box “Allow foreign currency for financial data” must be ticked in order to be able to enter data:

Foreign Offering 1.     
[Add a foreign currency offering](#)

- ✓ If you want to track the officiant of the events for reporting purposes, the box “Capture officiant member for Divine Service” must be ticked in order to be able to enter data;
- ✓ In case you prefer to enter acts during an event directly with the voucher data, the box “Capture event acts for Divine Service” must be ticked in order to be able to enter data (the data therefore must be indicated in the voucher in use):

Event Acts		Members	Officiant
<input type="checkbox"/> Marriage		Members	<input type="text" value="Type for search"/>
<input type="checkbox"/> Confirmation		Members	<input type="text" value="Type for search"/>
<input type="checkbox"/> Retired		Members	<input type="text" value="Type for search"/>
<input type="checkbox"/> Death		Members	<input type="text" value="Type for search"/>
<input type="checkbox"/> Ordination		Members	<input type="text" value="Type for search"/>
<input type="checkbox"/> Holy Baptism		Members	<input type="text" value="Type for search"/>
<input type="checkbox"/> Holy Sealing		Members	<input type="text" value="Type for search"/>

- ✓ We recommend to tick the box “Show event history in Event creation form”, this enables the data entry staff to correct or void the entered data quickly in case of an error:

Event History					
Date	Booking State	Total Attending	Guests Attending	Voucher Number	Offering
2017-07-24	open	12	1	000-032013	100.00 USD
					<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Void"/>

- ✓ For a speedy data entry, we recommend to tick the box “Enable event Quick entry checkbox”; this enables the data entry staff to enter vouchers for the same congregation continuously:

☒ Add another event

- ✓ By default, the system requires that a voucher range is set for every congregation (please refer to [chapter 6.3.10](#)). If you don't have any knowledge of this data in the administration office, the box “Create Events without voucher range for unit” has to be



ticked. In case the box is unticked and no voucher range has been defined for the congregation, it's not possible to enter event data:

Voucher No. *		<b>You need a voucher range to create an Event</b>
---------------	--	--

- ✓ If you want to track the event type of an event, the box "Capture Event type" has to be ticked. The available event type options can be configured in the master data (please refer to [chapter 4.3.1.3](#)).
- ✓ If you want to track the event type of an event but haven't specified any event times in the units (please refer to [chapter 6.3.4](#)) a warning pops up while entering event data and this error message has to be cleared by the data entry person:

Congregation *	Arterberry » Caneva » Rieber	<b>x</b>
Event Date *	19 . 09 . 2017	<b>No Event Time for this Date in Unit. Resend form to create Event for this date anyways</b>

To disable this warning, untick the box "Validate if event time matches"

- ✓ You have to define the voucher length (fixed part and total number of characters of the voucher number) according to the data entry voucher used in the Local Church.
- ✓ Warn levels: you have to adjust the warn levels according to the average offerings amount and average attendance of the Local Church. These warn levels help to avoid typing errors at the moment of data entry:

Offering *	1000	USD	<b>Value seems to be too high</b>
Total attendance *	1005		<b>Value seems to be too high</b>

The warn level for guests helps, for example, in cases where the guest and total attendance have been reversed:

Total attendance *	3	
Guests	25	<b>Value seems to be too high</b>



### 4.2.3 Membership data settings

Settings in “Membership” will have an effect on the analysis (reports), where we distinguish the members according to their age group:

Membership

Age children up to 15

Age youth up to 30

Age seniors from 61

Example “District List”:

District List							
District Caneva, 30.06.2017, 109 active Members in grouped Units							
Unit ↑	Congregations	Children	Youth	Adults	Seniors	Members	Ministers
Caneva	15	30	19	49	10	109	39
Total	15	30	19	0	10	109	39

Adjustment in “Settings” have an impact on the graphical user interface:

Settings

☒ Use free fields for blessing congregation and officiant

☐ Use civil status module

☐ Use 4 Addresslines instead of specific fields for Properties

☒ Use 4 Addresslines instead of specific fields for Households

☒ Use Deposit Unit Worksheet

☒ Use automatic Member ID Field generation

Start Number for automated member id generation 1

- ✓ **Use free fields for blessing congregation and officiant:** this box has an impact, if the congregation and officiant for a holy act (sealing, baptism, ...) can be entered in free form or has to be chosen from an existing data entry record in the database:

**Ticked:**

Date Baptism dd . mm . yyyy ☐ Minister abcd Congregation edfg

**Unticked:**

Date Sealing dd . mm . yyyy ☐ Minister ekl Congregation Type for search  
Ap. Ekstein, Kyra Rinne





- ✓ **Use civil status module:** if you untick the box, the civil status module in the member dashboard is turned off. To turn it on, tick the box:

Civil status <a href="#">Change</a>	
Civil status	Date
married	11.05.1990

- ✓ **Use 4 Address lines instead of specific fields for household:** this box determines, how the address of a household can be recorded in the data base.

***Ticked:***

Create new Household	
Head of Household	<input type="checkbox"/> Yes
Addressline 1	<input type="text"/>
Addressline 2	<input type="text"/>
Addressline 3	<input type="text"/>
Addressline 4	<input type="text"/>
Country *	Please select <input type="button" value="v"/>

***Unticked:***

Create new Household	
Head of Household	<input type="checkbox"/> Yes
Street, Housenumber *	<input type="text"/>
City *	<input type="text"/>
Zipcode *	<input type="text"/>
Country *	Please select <input type="button" value="v"/>

- ✓ **Use automatic Member ID field generation:** we recommend ticking this box, to ensure that the member ID's are unique numbers. You can decide with what number the automatic field ID generation should start. If the box is unticked, you have to enter a unique ID number when creating new members.



#### 4.2.4 Unit data settings

Settings

☒ Use free fields for blessing congregation and officiant  
☐ Use civil status module  
☐ Use 4 Addresslines instead of specific fields for Properties  
☒ Use 4 Addresslines instead of specific fields for Households  
☒ Use Deposit Unit Worksheet  
☒ Use automatic Member ID Field generation  
Start Number for automated member id generation 1

The only adjustment available for units is the decision regarding the address format of a property. According to the chosen option, the filters in the “Unit search” are different. The filter “City is” and “City is not” are only available if you use the specific address fields.

##### **Four Address lines:**

Create new Property

Property Type \*
Please select

Addressline 1

Addressline 2

Addressline 3

Addressline 4

Country \*
Please select

##### **Specific address fields:**

Create new Property

Property Type \*
Please select

Street, Hausenumber \*

City \*

Zipcode

Country \*
Please select



#### 4.2.5 Setting for Finance module (Reconciliation process)

Settings

☒ Use free fields for blessing congregation and officiant  
☐ Use civil status module  
☐ Use 4 Addresslines instead of specific fields for Properties  
☒ Use 4 Addresslines instead of specific fields for Households  
☒ Use Deposit Unit Worksheet  
☒ Use automatic Member ID Field generation  
Start Number for automated member id generation 1

You can decide whether you want to use the congregation worksheet (deposit unit worksheet) during the deposit entering process or not.

If you decide to use the congregation worksheet, the congregations of the district are displayed and you have to choose the vouchers for the reconciliation for each congregation.

Finance » New Batch | Deposit → Congregation Worksheet → Deductions → Save Deposit | Currency Conversion | Add Currency conversion

Congregation Worksheet

Congregation	Number of Vouchers	Attendees	Amount	
Aeschlimann (Congregation)	0	0	0.00 USD	<a href="#">Assign Vouchers</a>
Arterberry (Congregation)	0	0	0.00 USD	<a href="#">Assign Vouchers</a>
Bastille (Congregation)	0	0	0.00 USD	<a href="#">Assign Vouchers</a>
Bressman (Congregation)	0	0	0.00 USD	<a href="#">Assign Vouchers</a>
Budziszewski (Congregation)	0	0	0.00 USD	<a href="#">Assign Vouchers</a>

If you don't use the congregation worksheet, the vouchers are displayed and you can choose the vouchers without having to select a congregation first:

Finance » Batch #8 | Deposit → Vouchers → Deductions → Save Deposit | Currency Conversion | Add Currency conversion

Add Vouchers for Leitz in Deposit Batch #8

Voucher No.	Congregation	Date	Attendees	Amount	Select
000-000001	Itensis (Congregation)	2016-07-25	31	120.00 USD	<input type="checkbox"/>
000-000002	Itensis (Congregation)	2016-07-28	19	80.00 USD	<input type="checkbox"/>

#### 4.2.6 Performance settings for data entry speed

For the payment of data entry staff, it may be necessary to track the number of vouchers entered per user. You can define the performance settings for this purpose according to the circumstances of the Local Church.

The performance settings are used in the report "User Performance List", where the performance of every data entry user can be analysed (please refer to [chapter 11.3.3](#)):



Performance Settings	Very Excellent	800
	Very Good Performance	700
	Good Performance	600
	Fair Performance	500
	Needs Improvement Performance	400

## User Performance

District Church Barrus , 01.09.2016 - 30.09.2016

Member	Date	Vouchers	Performance
Gotshall, Ruth	01.09.2016	1,116	Excellent
	02.09.2016	994	Excellent
	05.09.2016	1,384	Excellent
	06.09.2016	1,573	Excellent



## 4.3 Master Data

To manage the master data, open the client details and click on “Change and customize”:

[Clients](#) » DC Werter

Details [Edit](#)

Name DC Werter

Description

Actions

- [Reindex data](#)
- [Excel Import](#)
- [DBF/OASYS Import](#)
- [Reset client database](#)
- [Create Portable Container](#)
- [Delete Client](#)

Masterdata

[Change and customize](#) the available options and types for this client

Commission management

[Manage](#) the permissions for the commissions

Report management

[Manage](#) the available reports this client

### 4.3.1 Event related master data

#### 4.3.1.1 Currency

The currency setting is very important. You define the primary currency in which offerings and deposit will be entered. It is important to set the currency before starting to import data into the client. For each client, only one primary currency is permitted.

[Clients](#) » [DC Werter](#) » [Masterdata](#) » Currency [Create new](#)

Name	Level	Short symbol	Long symbol	Primary	state	
US-Dollar	3		USD	Yes	active	<a href="#">Edit</a>
Euro	2		EUR		active	<a href="#">Edit</a>
Zambia Kwacha	1		ZMK		active	<a href="#">Edit</a>

To add an additional currency, click “**Create new**”.

To edit the primary currency, the sorting level and to set a currency inactive, click “**Edit**”.

Edit Row

Name

Level

Short symbol

Long symbol

state active

primary\_currency yes

[Save Record](#) [Cancel](#)

Edit Row US-Dollar

Level

Short symbol

Long symbol

state active

primary\_currency yes

[Save Record](#) [Cancel](#)



#### 4.3.1.2 Event Act Type

In this section, you can determine which (holy) acts are used in the client:

☰ Clients » DC Werter » Masterdata » EventActType [Create new](#)

Name	Description	Level	state	
Marriage		35	active	<a href="#">Edit</a>
Confirmation		30	active	<a href="#">Edit</a>
Retired		25	inactive	<a href="#">Edit</a>
Death		20	inactive	<a href="#">Edit</a>
Ordination		15	active	<a href="#">Edit</a>
Holy Baptism		10	active	<a href="#">Edit</a>
Holy Sealing		5	active	<a href="#">Edit</a>

To add an additional event act type, click “**Create new**”.

To edit event act types, the sorting level and to set an event act type inactive, click “**Edit**”.

This setting will determine the data entry form for event acts:

Add Event Acts

Congregation \*

Event \*  ▼

Event Acts		
Marriage	<input type="text" value="0"/>	Numbers
Confirmation	<input type="text" value="0"/>	Numbers
Ordination	<input type="text" value="0"/>	Numbers
Holy Baptism	<input type="text" value="0"/>	Numbers
Holy Sealing	<input type="text" value="0"/>	Numbers

[Save Holy Acts](#) [Cancel](#)



#### 4.3.1.4 Bank Account Type

In order to be able to register a deposit, you have to record a bank account at Local Church level. In this section, you determine which bank account types are available for that purpose:

<a href="#">Clients</a> » <a href="#">DC Werter</a> » <a href="#">Masterdata</a> » BankAccountType <a href="#">Create new</a>			
Name	Level	state	
savings		active	<a href="#">Edit</a>
trust		inactive	<a href="#">Edit</a>
offerings		active	<a href="#">Edit</a>
operations		active	<a href="#">Edit</a>

To add an additional bank account type, click “**Create new**”.

To edit bank account types, the sorting level and to set a bank account type inactive, click “**Edit**”.

This setting will determine which types of bank accounts can be recorded in the Bank Account section on Local Church level (please refer to [chapter 6.3.11](#)).

#### 4.3.1.5 Cost Type

Cost types are used in the deductions part of the reconciliation process (deductions). You determine in this section, which cost types will be used in the client.

<a href="#">Clients</a> » <a href="#">DC Werter</a> » <a href="#">Masterdata</a> » CostType <a href="#">Create new</a>				
Name	Description	Level	Cost Type	state
Offering			revenue	active
Thank-offering			revenue	active
Specific donations			revenue	active
Travel expenses			expense	active
Properties			expense	inactive
Public Relations			expense	inactive

To add a cost type, click “**Create new**”.

To edit cost types, the sorting level and to set a cost type inactive, click “**Edit**”.

You should set cost types according to the chart of accounts used in the Local Church.



## 4.3.2 Membership master data

### 4.3.2.1 Commission

In the commission area you manage commissions regarding church activities (such as congregation rector, district leader, ...) as well as commissions for OASYS III users (Data entry attendance/offering, Management membership data, System administrator, ...).

To every commission you can assign permissions to access OASYS II (for further information please refer to commission management in [chapter 4.4](#)).

<a href="#">Clients</a> » <a href="#">DC Werter</a> » <a href="#">Masterdata</a> » Commission <a href="#">Create new</a>			
Name	Description	Level	state
Chief Apostle Helper			inactive <a href="#">Edit</a>
Choir conductor			inactive <a href="#">Edit</a>
Community Elder			inactive <a href="#">Edit</a>
Confirmation teacher			inactive <a href="#">Edit</a>
Congregation membership administrator			inactive <a href="#">Edit</a>
Congregation Rector		1	active <a href="#">Edit</a>
Depositor			active <a href="#">Edit</a>

To add an additional commission, click **“Create new”**.

To edit commissions and set a commission inactive, click **“Edit”**.

**Note:** do not set the following commissions inactive, they are used in different reports:

- ✓ District Leader
- ✓ Sub district Leader
- ✓ Congregation Rector





#### 4.3.2.2 Contact Type

You can adjust the contact types according to the needs of the Local Church:

☰ Clients » DC Werter » Masterdata » ContactType | [Create new](#)

Name	Description	Level	state	
Private Phone			active	<a href="#">Edit</a>
Private Mobilephone			active	<a href="#">Edit</a>
Private Fax			active	<a href="#">Edit</a>
Business Phone			active	<a href="#">Edit</a>
Business Mobilephone			active	<a href="#">Edit</a>
Business Fax			active	<a href="#">Edit</a>
E-Mail			active	<a href="#">Edit</a>
Skype			active	<a href="#">Edit</a>

To add an additional contact type, click “**Create new**”.

To edit contact types and set them active/inactive, click “**Edit**”.

#### 4.3.2.3 Family State Type

You can adjust the family state type (marital status) according to the needs of the Local Church:

☰ Clients » DC Barrus » Masterdata » FamilyStateType | [Create new](#)

Name	Description	Level	state	
single			active	<a href="#">Edit</a>
married			active	<a href="#">Edit</a>
divorced			active	<a href="#">Edit</a>
undisclosed			active	<a href="#">Edit</a>
widowed			active	<a href="#">Edit</a>

To add an additional marital status, click “**Create new**”.

To edit marital status types and set them active/inactive, click “**Edit**”.

#### 4.3.2.4 Gender

In OASYS III we distinguish between “male” and “female”:

☰ Clients » DC Werter » Masterdata » Gender | [Create new](#)

Name	Level	state	
male		active	<a href="#">Edit</a>
female		active	<a href="#">Edit</a>

Gender master data should not be edited.



#### 4.3.2.5 Member Ministry Purpose

This section shows the available options to end a ministry:

<a href="#">Clients</a> » <a href="#">DC Werter</a> » <a href="#">Masterdata</a> » MemberMinistryPurpose   <a href="#">Create new</a>			
Name	Level	state	
Retired		active	<a href="#">Edit</a>
Removed		active	<a href="#">Edit</a>
Resigned		active	<a href="#">Edit</a>
Leave of absence		active	<a href="#">Edit</a>
Unkown		Inactive	<a href="#">Edit</a>

We do not recommend editing these options, since these are the official ways to end a ministry in the New Apostolic Church.

#### 4.3.2.6 Ministry Type

The “Ministry type” master data should not be edited. The ministry types correspond to the ministry levels as determined by the New Apostolic Church:

<a href="#">Clients</a> » <a href="#">DC Werter</a> » <a href="#">Masterdata</a> » MinistryType   <a href="#">Create new</a>			
Name	Description	Level	state
Chief Apostle		5	active
District Apostle		10	active
Apostle		15	active
Bishop		20	active
District Elder		25	active
District Evangelist		30	active
Shepherd		35	active
Evangelist		40	active
Priest		45	active
Deacon		50	active
Subdeacon		55	active

#### 4.3.2.7 Permission

The following permissions are in use in OASYS III:

Permission	Description
Activity Reporting (drill down)	Permission to use Activity Reporting (drill down)
Activity Reporting (without drill down)	Permission to use Activity Reporting (without drill down)
Administrative Member Functions	Permission to reactivate ended ministries
Administrative Voucher Functions	Permission unvoid an reopen vouchers
Attendance Trend Report	Permission to use the Attendance Trend Report
Book month	Permission to book a month; change the status of an event voucher from open to booked



Congregation Profile Report	Permission to use Congregation Profile Report
Create Statistic	Permission to enter data for events (event statistics) and event acts
Create voucher ranges	Permission to create a voucher range for a unit
Decease Members Full Report	Permission to use the Decease Members Full Report
Decease Members Grouped Report	Permission to use the Decease Members Grouped Report
Deposit Reconciliation Worksheet	Permission to use the Deposit Reconciliation Worksheet
District Leaders Report	Permission to use the District Leaders Report
District List Report	Permission to use the District List Report
Event Acts Full Report	Permission to use the Event Acts Full Report
Event Acts Simple Report	Permission to use the Event Acts Simple Report
Future Retirements Report	Permission to use the Future Retirements Report
Manage client Settings	Permission to manage the settings of a client (details, report management, commission management, master data) and reindex the data
Manage Finance	Permission to create/edit deposits and to manage the currency conversion
Manage Member	Permission to create, edit and delete a member
Manage system account	Permission to create, edit, assign permissions and delete a system account. The user creating the account can only assign the permissions, which he holds himself.
Manage Unit	Permission to create, edit and maintain the data of a unit and to use unit related actions as combine units, move units and move member.
Member Full Report	Permission to use the Member Full Report
Member PDF Export	Permission to use the Member PDF Export
Member Profile Report	Permission to use the Member Profile Report
Member Report (active, sealings, death)	Permission to use the Member Report (active, sealings, death)
Minister Change Report	Permission to use the Minister Change Report
Minister Distribution Report	Permission to use the Minister Distribution Report
Minister Full Report	Permission to use the Minister Full Report



Minister List Report	Permission to use the Minister List Report
Offering Comparison Report	Permission to use the Offering Comparison Report
Offering with Foreign Currency	Permission to use the Offering with Foreign Currency
Read Finance	Read permission for data in the finance module
Read Member	Read permission for member data
Read Statistics	Read permission for data in the statistics module
Read Unit	Read permission for unit data
Super Permission	Permission only for a system administrator! Permission to create, edit and delete data in the whole OASYS III installation; Backup/Restore; creation of portable container; data import; database reset; translation;
System Account List	Permission to use the System Account list
Unit Verification List	Permission to use the Unit Verification List
User Access History Report	Permission to use the User Access History Report
User Performance Report	Permission to use the User Performance Report
Voided Vouchers Report	Permission to use the Voided Vouchers Report
Voucher Control Log Report	Permission to use the Voucher Control Log Report
Voucher Drilldown by Number Report	Permission to use the Voucher Drilldown by Number Report
Voucher Drilldown by Officiant Report	Permission to use
Voucher Drilldown by Unit Report	Permission to use
Voucher Entry Verification Log	Permission to use the Voucher Entry Verification Log
Yearly Report	Permission to use the Yearly Report
Yearly Report Five Dates	Permission to use the Yearly Report Five Dates



### 4.3.3 Unit master data

#### 4.3.3.1 Unit Type

You can adjust the unit tree structure in OASYS II if needed:

Clients » DC Werter » Masterdata » UnitType <a href="#">Create new</a>			
Name	Description	Level	state
International Church		80	active
District Apostle Area		70	active
District Apostle Helper Area		67	active
Administration		65	active
District Church		50	active
Regional administration Center		45	inactive
Apostle District		40	active
Bishop District		30	active
District		20	active
Sub District		15	active
Congregation		10	active
Mission		5	active
Special		1	active

To add an additional unit type, click **“Create new”**.

To edit unit types, the sorting level and to set a unit type inactive, click **“Edit”**.

#### 4.3.3.2 Property Type

According to the needs, you can manage the available property types in this section:

Clients » DC Werter » Masterdata » PropertyType <a href="#">Create new</a>			
Name	Description	Level	state
Other			active
Outside			inactive
Own Building			active
Own Land			active
Rented			active

To add an additional property type, click **“Create new”**.

To edit property types, the sorting level and to set a property type inactive, click **“Edit”**.

#### 4.3.3.3 Country

In this section, you manage the country list. Countries are used for addresses in households and properties:



[Clients](#) » [DC Werter](#) » [Masterdata](#) » Country [Create new](#)

Name	Level	state	
Afghanistan		active	<a href="#">Edit</a>
Aland Islands		active	<a href="#">Edit</a>
Albania		active	<a href="#">Edit</a>
Algeria		active	<a href="#">Edit</a>

To add an additional country, click **“Create new”**.

To edit countries, the sorting level and to set a country inactive, click **“Edit”**.

#### 4.3.4 Not in use at the moment (for future expansion of the system)

##### 4.3.4.1 Activity State Type

In this section, the available activity status types are listed:

[Clients](#) » [DC Werter](#) » [Masterdata](#) » ActivityStateType [Create new](#)

Name	Description	Level	state	
attending			active	<a href="#">Edit</a>
do not contact			active	<a href="#">Edit</a>
not attending			active	<a href="#">Edit</a>

##### 4.3.4.2 Language

In this master data section, all the languages are listed:

[Clients](#) » [DC Werter](#) » [Masterdata](#) » Language [Create new](#)

Name	Level	state	
German		active	<a href="#">Edit</a>
Ghanaian		active	<a href="#">Edit</a>
Serbo-Croatian		active	<a href="#">Edit</a>

##### 4.3.4.3 Membership State

In this section, the available membership status types are listed:

[Clients](#) » [DC Werter](#) » [Masterdata](#) » MembershipState [Create new](#)

Name	Description	Level	state	
member			active	<a href="#">Edit</a>
pending			active	<a href="#">Edit</a>
dead			active	<a href="#">Edit</a>
banned			active	<a href="#">Edit</a>
deceased			active	<a href="#">Edit</a>
left the church			active	<a href="#">Edit</a>



#### 4.3.4.4 Nationality

In this master data section, all nationalities are listed:

<a href="#">Clients</a> » <a href="#">DC Werter</a> » <a href="#">Masterdata</a> » Nationality   <a href="#">Create new</a>			
Name	Level	state	
Afghan		active	<a href="#">Edit</a>
Albanian		active	<a href="#">Edit</a>
Algerian		active	<a href="#">Edit</a>
Andorran		active	<a href="#">Edit</a>
Angolan		active	<a href="#">Edit</a>



## 4.4 Commission Management

In the commission management, you can assign a selection of permissions to a commission. This function can be understood as a role-based allocation of permissions.

Every Local Church can create the necessary commissions (please refer to [chapter 4.3.2.1](#)).

These commissions can be related to church activities or to the use of OASYS III.

In a first step, the Local Church has to determine which commissions are needed and in a next step decide which permissions will be assigned to each commission. It is not necessary to define permissions for every commission, only for the commission that will be used for OASYS III users.

If you assign a commission to a member recorded in OASYS III, this member doesn't have access to the system. First, you have to create a user account for this member to make the assignment of permissions in the commission effective.

To access the commission management, open the client details and click on "Manage":

[Clients](#) » DC Barrus

Details Edit

Name DC Barrus

Description

Masterdata

[Change and customize](#) the available options and types for this client

Commission management

[Manage](#) the permissions for the commissions

Report management

[Manage](#) the available reports this client

Actions

- [Reindex data](#)
- [Excel Import](#)
- [DBF/OASYS Import](#)
- [Reset client database](#)
- [Create Portable Container](#)
- [Delete Client](#)

Example:

Commission	Permissions	Manage
Congregation Rector	<a href="#">Member Full Report</a> <a href="#">Member Grouped Report</a> <a href="#">Member Profile Report</a> <a href="#">Minister Full Report</a> <a href="#">Minister Grouped Report</a> <a href="#">Attendance Trend Report</a> <a href="#">Offering Comparison Report</a> <a href="#">Congregation Profile Report</a> <a href="#">Future Retirements Report</a> <a href="#">Read Member</a> <a href="#">Read Unit</a> <a href="#">Read Statistics</a> <a href="#">Read Finance</a> <a href="#">Member PDF Export</a> <a href="#">Minister List Report</a>	<a href="#">Manage permissions</a>
Data Entry Offering/Attendance	<a href="#">Read Unit</a> <a href="#">Create Statistic</a>	<a href="#">Manage permissions</a>
Depositor	No permissions	<a href="#">Manage permissions</a>
District Leader	<a href="#">Member Full Report</a> <a href="#">Member Grouped Report</a> <a href="#">Member Profile Report</a> <a href="#">Read Member</a> <a href="#">Read Unit</a> <a href="#">Member PDF Export</a>	<a href="#">Manage permissions</a>
Landlord	No permissions	<a href="#">Manage permissions</a>
Lead Apostle	<a href="#">Member Full Report</a> <a href="#">Member Grouped Report</a> <a href="#">Member Profile Report</a> <a href="#">Minister Full Report</a> <a href="#">Minister Grouped Report</a> <a href="#">Minister Distribution Report</a> <a href="#">Activity Report</a> <a href="#">District List Report</a> <a href="#">Attendance Trend Report</a> <a href="#">Congregation Profile Report</a> <a href="#">Activity Reporting</a> <a href="#">Deposit Reconciliation Worksheet</a> <a href="#">Future Retirements Report</a> <a href="#">District Leaders Report</a> <a href="#">Event Acts Grouped Report</a> <a href="#">Event Acts Full Report</a> <a href="#">Read Member</a> <a href="#">Read Unit</a> <a href="#">Read Statistics</a> <a href="#">Read Finance</a> <a href="#">Member PDF Export</a> <a href="#">Minister List Report</a> <a href="#">Decease Members Full Report</a> <a href="#">Decease Members Grouped Report</a>	<a href="#">Manage permissions</a>





To assign or edit preassigned permissions, click on “Manage Permissions”:

Commission	Permissions	Manage
Congregation Rector	<a href="#">Member Full Report</a> <a href="#">Member Grouped Report</a> <a href="#">Member Profile Report</a> <a href="#">Minister Full Report</a> <a href="#">Minister Grouped Report</a> <a href="#">Attendance Trend Report</a> <a href="#">Offering Comparison Report</a> <a href="#">Congregation Profile Report</a> <a href="#">Future Retirements Report</a> <a href="#">Read Member</a> <a href="#">Read Unit</a> <a href="#">Read Statistics</a> <a href="#">Read Finance</a> <a href="#">Member PDF Export</a> <a href="#">Minister List Report</a>	<a href="#">Manage permissions</a>

In the following window, you select the permissions to be assigned to the commission:

[Clients](#) » [DC Barrus](#) » [Commissions](#) » Congregation Rector

Read Permissions	<input checked="" type="checkbox"/> Read Finance <input checked="" type="checkbox"/> Read Member <input checked="" type="checkbox"/> Read Statistics <input checked="" type="checkbox"/> Read Unit
Edit Permissions	<input type="checkbox"/> Book month <input type="checkbox"/> Create Statistic <input type="checkbox"/> Create voucher ranges <input type="checkbox"/> Manage Finance <input type="checkbox"/> Manage Member <input type="checkbox"/> Manage Unit
Report Permissions	<input type="checkbox"/> Activity Report <input type="checkbox"/> Activity Reporting <input checked="" type="checkbox"/> Attendance Trend Report <input checked="" type="checkbox"/> Congregation Profile Report

Only permissions that are “active” can be selected. Permissions which are set as “inactive” can’t be assigned. You can only assign permissions which you have as OASYS III user.

For a detailed description of the permissions, refer to [chapter 4.3.2.7](#).

Permissions which are assigned by a commission are marked as such in the user’s system account:

Read Permissions	<input checked="" type="checkbox"/> Read Finance Assigned by commission <input checked="" type="checkbox"/> Read Member Assigned by commission <input checked="" type="checkbox"/> Read Statistics Assigned by commission <input checked="" type="checkbox"/> Read Unit Assigned by commission
------------------	---

You can only edit these permissions in the commission management for every user to which this commission has been assigned to, but not in the system account of a specific user.



## 4.5 User Management

In OASYS III we offer two different ways to allocate permissions to users:

- individual allocation of permissions (per person)
- role-based allocation of permissions (via commissions)

We recommend, wherever possible, to use the role-based allocation of permissions to reduce the administrative burden in the user management and to have a clear assignment of permissions, which can be managed easily.

To manage a user (system account), open the member dashboard:

<b>Personal Details</b> <a href="#">Edit</a> <b>Name</b> Ekstein, Kyra <b>Birthday</b> 27.09.1956 <b>Gender</b> male <b>ID</b> 31905 <b>Unit</b> <a href="#">Rinne (Congregation)</a> <a href="#">Change</a>	<b>Contact Details</b> <a href="#">Add</a> Contact details for the member, exp. phone number, email or skype	<b>Member Actions</b> <ul style="list-style-type: none"> <li>• <a href="#">Delete Member</a></li> <li>• <a href="#">Change Unit</a></li> <li>• <a href="#">PDF Profil</a></li> <li>• <a href="#">History</a></li> </ul>
<b>Household</b> <a href="#">Create new</a> Create a new household or assign the member to an existing household	<b>Commissions</b> <a href="#">Add</a> <b>Lead Apostle</b> 09.06.2016 <a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a> <a href="#">Rieber</a>	<b>System Account</b> <a href="#">Edit</a>   <a href="#">Delete</a> E-Mail: apostle@oasys.network

### 4.5.1 Create a user (system account)

To grant a person access to the OASYS III, the person has to be recorded as member and afterwards a system account has to be added.

To add a new system account, open the member for which the account should be added and click on “Add”:

<b>Personal Details</b> <a href="#">Edit</a> <b>Name</b> Larue, Jed <b>Birthday</b> 05.08.1971 <b>Gender</b> male <b>Date of Death</b> 21.05.2007 <b>ID</b> 17790 <b>Unit</b> <a href="#">Aeschlimann</a> <a href="#">Change</a> <a href="#">(Congregation)</a>	<b>Contact Details</b> <a href="#">Add</a> Contact details for the member, exp. phone number, email or skype	<b>Member Actions</b> <ul style="list-style-type: none"> <li>• <a href="#">Delete Member</a></li> <li>• <a href="#">Change Unit</a></li> <li>• <a href="#">PDF Profil</a></li> <li>• <a href="#">History</a></li> </ul>															
<b>Household</b> <a href="#">Create new</a> Create a new household or assign the member to an existing household	<b>Commissions</b> <a href="#">Add</a> There are no commissions assigned for this member.	<b>System Account</b> <a href="#">Add</a> Add a system account for the member in order to grant the member access to the system as a user.															
<b>Civil status</b> <a href="#">Change</a> <b>Civil status</b> <b>Date</b> single 09.06.2016	<b>Ministries</b> <a href="#">Add</a> <table border="1"> <thead> <tr> <th>Ministry Type</th> <th>Unit</th> <th>Place of Act</th> <th>Start date</th> <th>End date</th> </tr> </thead> <tbody> <tr> <td>Deacon</td> <td></td> <td></td> <td>09.06.2016</td> <td><a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a></td> </tr> <tr> <td><a href="#">Add Working Area</a></td> <td><a href="#">Aeschlimann</a> <a href="#">(Congregation)</a></td> <td></td> <td>09.06.2016</td> <td><a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a></td> </tr> </tbody> </table>		Ministry Type	Unit	Place of Act	Start date	End date	Deacon			09.06.2016	<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>	<a href="#">Add Working Area</a>	<a href="#">Aeschlimann</a> <a href="#">(Congregation)</a>		09.06.2016	<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>
Ministry Type	Unit	Place of Act	Start date	End date													
Deacon			09.06.2016	<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>													
<a href="#">Add Working Area</a>	<a href="#">Aeschlimann</a> <a href="#">(Congregation)</a>		09.06.2016	<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>													



In the following dialog, enter the email and assign an initial password:

Create new System Account

E-Mail \*

Password \*

The user is asked to change the initial password when logging into the system the first time:

You should change your Password at the first Login

Profile | Details | Edit profile | Change Password

Change Password

Password

Change password

Every user can manage his login credentials in the “Profile” section (refer to [chapter 4.5.1.1](#)).

#### 4.5.1.1 User Profile

You can access your user profile at the top:

OASYS III

Ekstein, Kyra

Profile

Logout

The profile dashboard shows the email and the assigned permissions:

Profile | Details | Edit profile | Change Password

Details

E-Mail: apostle@oasys.network

Permissions

- Attendance Trend Report
- Congregation Profile Report
- Decease Members Full Report
- Decease Members Grouped Report
- Deposit Reconciliation Worksheet
- District Leaders Report
- District List Report

You can change the email and the language of your account:

Profile | Details | Edit profile | Change Password

E-Mail

apostle@oasys.network

Locale

English

Change profile



You can change the password whenever needed:

#### 4.5.2 Direct assignment of permissions

If only a few users have to be managed in the OASYS III installation, you can assign permissions directly in every user's system account.

Whenever possible, however, we recommend the assignment of permissions by roles (commission), especially if the user should access with restrictions regarding certain units.

To assign permissions directly to a user, open the member and click on "Edit" in the system account section:

Tick the permissions to assign to this specific user.

Only permissions that are "active" are available for selection. Permissions which are set as "inactive" in the client will not be displayed. You can only assign permissions which you have as OASYS III user.

For a detailed description of the permissions, refer to [chapter 4.3.2.7](#).

**Note:** permissions set as individual permissions will apply to the whole installation; if a restriction for a certain unit is needed, a commission has to be assigned with that unit as working area and the commission area mode must be activated (please refer to [chapter 4.5.4](#)).



### 4.5.3 Role based allocation of permissions via commissions

If a lot of users with different access levels and restrictions access the system, the role base allocation of permissions via commissions should be used.

Please refer to [chapter 4.4](#) for information regarding the commission management (allocation of permissions) and [chapter 4.3.2.1](#) to manage the available commissions.

To assign permissions to a user via a commission, open the member dashboard:

<b>Personal Details</b> <a href="#">Edit</a> <b>Name</b> Larue, Jed <b>Birthday</b> 05.08.1971 <b>Gender</b> male <b>Date of Death</b> 21.05.2007 <b>ID</b> 17790 <b>Unit</b> <a href="#">Aeschlimann</a> <a href="#">Change</a> <a href="#">(Congregation)</a>	<b>Contact Details</b> <a href="#">Add</a>  Contact details for the member, exp. phone number, email or skype	<b>Member Actions</b> <ul style="list-style-type: none"> <li>• <a href="#">Delete Member</a></li> <li>• <a href="#">Change Unit</a></li> <li>• <a href="#">PDF Profil</a></li> <li>• <a href="#">History</a></li> </ul>
<b>Household</b> <a href="#">Create new</a>  Create a new household or assign the member to an existing household	<b>Commissions</b> <a href="#">Add</a>  There are no commissions assigned for this member.	<b>System Account</b> <a href="#">Edit</a>   <a href="#">Delete</a>  E-Mail: user@oasys.network

Select the commission to assign and define the working area for that commission and set a start date:

**Create new Commission**

Commission Type \* Congregation Rector

Commission for Unit \* Aeschlimann (Congregation) » Caneva » Rieber

Start date \* 01 . 01 . 2016

Save Commission [Cancel](#)

In the system account of this user, the permissions will be set as defined in the commission management.

Example “Read Permissions” of a Congregation Rector:

Commission	Permissions
Congregation Rector	Member Full Report   Member Grouped Report   Member Profile Report   Minister Full Report   Minister Grouped Report
	Attendance Trend Report   Offering Comparison Report   Congregation Profile Report   Future Retirements Report   <b>Read Member</b>
	<b>Read Unit</b>   <b>Read Statistics</b>   <b>Read Finance</b>   Member PDF Export   Minister List Report

The permissions are now selected in the system account of the user:



Edit System Account

E-Mail \*
user@oasys.network

Password \*

Commission area mode
☐ Yes, restrict visible units and members to assigned working areas

Read Permissions

☒ Read Finance Assigned by commission
☒ Read Member Assigned by commission
☒ Read Statistics Assigned by commission
☒ Read Unit Assigned by commission

It is not possible to adjust the permissions in the individual system account of a user. If you have to adjust the permissions, you have to adjust these permissions in the commission management of the client.

**Note:** adjustment to the permissions of a commission will affect every user to which this commission has been assigned!

**Note:** permissions assigned to a user via commissions are valid for the whole system, if the commission area mode is not activated (please refer to [chapter 4.5.4](#)).

#### 4.5.4 Restriction of user access via working area of a commission

It is possible to restrict the access of a user to a specific unit(s). The restriction applies to individual assigned permissions in the system account as well as to permissions assigned via a commission.

To activate the “Commission area mode” and restrict the access to a specific unit, open the system account of the user:

Edit System Account

E-Mail \*
user@oasys.network

Password \*

Commission area mode
☒ Yes, restrict visible units and members to assigned working areas

Now the access of this user is restricted to the working area stated in the commission assignment.

Commission area mode	<input checked="" type="checkbox"/> Yes, restrict visible units and members to assigned working areas
Read Permissions	<input type="checkbox"/> Read Finance <input type="checkbox"/> Read Member <input type="checkbox"/> Read Statistics <input checked="" type="checkbox"/> Read Unit Assigned by commission
Edit Permissions	<input type="checkbox"/> Book month <input checked="" type="checkbox"/> Create Statistic Assigned by commission

Commissions [Add](#)

Data Entry 01.01.2016 [Edit](#) | [End](#) | [Delete](#)

Offering/Attendance

[Caneva](#)

<p>Selection</p> <ul style="list-style-type: none"> <li>NAKI           <ul style="list-style-type: none"> <li>District Church Barrus               <ul style="list-style-type: none"> <li>Apostle District Rieber                   <ul style="list-style-type: none"> <li><b>District Caneva</b> <ul style="list-style-type: none"> <li>Congregation Aeschlimann</li> <li>Congregation Arterberry</li> <li>Congregation Bastille</li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ul>	<p>Details <a href="#">District Caneva</a></p>		
	<table> <tr> <td><b>Total Members</b></td><td>109</td></tr> </table>	<b>Total Members</b>	109
<b>Total Members</b>	109		
	<table> <tr> <td><b>Total active Ministers</b></td><td>39</td></tr> </table>	<b>Total active Ministers</b>	39
<b>Total active Ministers</b>	39		
	<table> <tr> <td><b>Total Apostle Districts</b></td><td>0</td></tr> </table>	<b>Total Apostle Districts</b>	0
<b>Total Apostle Districts</b>	0		
	<table> <tr> <td><b>Total Districts</b></td><td>0</td></tr> </table>	<b>Total Districts</b>	0
<b>Total Districts</b>	0		
	<table> <tr> <td><b>Total Congregations</b></td><td>15</td></tr> </table>	<b>Total Congregations</b>	15
<b>Total Congregations</b>	15		

### Add Event Statistics

Congregation *	<input type="text" value="Type for search"/> <ul style="list-style-type: none"> <li>Aeschlimann » Caneva » Rieber</li> </ul>
Event Date *	Arterberry » Caneva » Rieber
Event Type *	Bastille » Caneva » Rieber
Offering *	Bressman » Caneva » Rieber Budziszewski » Caneva » Rieber Chatley » Caneva » Rieber
Total attendance *	Erker » Caneva » Rieber



## 4.6 Report Management

Depending on the individual settings for a client and the needs of the Local Church, not all reports available in OASYS III should be enabled for the user.

In the report management section, you can control which reports will be available to the user of your OASYS III installation.

In the report management, reports are enabled/disabled for a whole client. User access to reports is managed in the user management (please refer to [chapter 4.5](#)).

To access the report management, open the client dashboard:

The system administrator can now choose which reports should be available by ticking the boxes:

<input checked="" type="checkbox"/> Activity Reporting (drill down)	Permission to use Activity Reporting (drill down)
<input checked="" type="checkbox"/> Activity Reporting (without drill down)	Permission to use Activity Reporting (without drill down)
<input checked="" type="checkbox"/> Attendance Trend Report	Permission to use the Attendance Trend Report
<input checked="" type="checkbox"/> Congregation Profile Report	Permission to use Congregation Profile Report
<input checked="" type="checkbox"/> Decease Members Full Report	Permission to use the Decease Members Full Report
<input type="checkbox"/> Decease Members Grouped Report	Permission to use the Decease Members Grouped Report
<input checked="" type="checkbox"/> Deposit Reconciliation Worksheet	Permission to use the Deposit Reconciliation Worksheet
<input checked="" type="checkbox"/> District Leaders Report	Permission to use the District Leaders Report
<input checked="" type="checkbox"/> District List Report	Permission to use the District List Report
<input type="checkbox"/> Event Acts Full Report	Permission to use the Event Acts Full Report
<input checked="" type="checkbox"/> Event Acts Simple Report	Permission to use the Event Acts Simple Report
<input checked="" type="checkbox"/> Future Retirements Report	Permission to use the Future Retirements Report
<input type="checkbox"/> Member Full Report	Permission to use the Member Full Report
<input checked="" type="checkbox"/> Member PDF Export	Permission to use the Member PDF Export

Please refer to [chapter 11](#) for a short description of the OASYS III reports.





## 4.7 Actions

Client actions are reserved to the system administrator (a super permission is needed), with exception of the data indexation (which can also be accessed with a lower permission).

To access client actions, open the client dashboard:

**Clients » DC Barrus**

**Details** [Edit](#)

**Name** DC Barrus

**Description**

**Actions**

- [Reindex data](#)
- [Excel Import](#)
- [DBF/OASYS Import](#)
- [Reset client database](#)
- [Create Portable Container](#)
- [Delete Client](#)

**Masterdata**

[Change and customize](#) the available options and types for this client

**Commission management**

[Manage](#) the permissions for the commissions

**Report management**

[Manage](#) the available reports this client

### 4.7.1 Indexation of data

To enhance the performance of OASYS III reports, the system uses data indexation.

Normally, the system indexes the data automatically in a nightly job:

Administrator, Admin Profile Jobs Translation Backup / Restore Logout Last Targets French					
Clients   <a href="#">List</a>   <a href="#">Create new</a>					
Jobs					
ID	Job	Description	Create Time	State	Results
#1732	Member Full Export	Member Full Report PDF for Congregation Arterberry 26.07.2017 - 26.07.2017	2017-07-26 09:57	done	<a href="#">Download</a>
#1731	Reindexing Events	Indexing Events for Report Usage	2017-07-26 01:00	done	<a href="#">Download</a>
#1730	Reindexing Ministers	Index Ministers for Report Usage	2017-07-26 01:00	done	<a href="#">Download</a>
#1729	Reindexing Member Fulltext	Reindexing the Member Search Index	2017-07-26 01:00	done	<a href="#">Download</a>
#1728	Reindexing Members	Index Members for Report Usage	2017-07-26 01:00	done	<a href="#">Download</a>

In certain cases, it may be necessary to start the indexation job manually, as for example after the data import from excel sheets or if the server is turned off at night.

To index the data manually, click on "Reindex data":

**Start Indexing**

Index \* Member

[Start Indexing](#) [Cancel](#)

Choose one of the following options for the indexation:

- ✓ Member
- ✓ Minister
- ✓ Event
- ✓ Member (Full Text)



Click on “Start Indexing” to start the job.

In the job list, we can monitor the progress of the indexation:

Administrator, Admin Profile <b>Job running</b> Translation Backup / Restore Logout Last Targets					
Clients   <a href="#">List</a>   <a href="#">Create new</a>					
Jobs					
ID	Job	Description	Create Time	State	
#1734	Reindexing Events	Indexing Events for Report Usage	26.07.2017 13:28	progress	
#1733	Reindexing Member Fulltext	Reindexing the Member Search Index	26.07.2017 13:28	done	

**Note:** Depending on the volume of data in the system, an indexing job can take seconds up to several hours to be completed.

#### 4.7.2 Excel Import

To start an Excel import, click on “Excel Import” in “Actions”:

Select the correct import format for the Excel to upload, depending on whether you import unit or member data.

Choose the Excel file to upload data and start the import by clicking on “Start Import”.

**Note:** before members can be imported, you have to import units in a first step.

The system now starts the import job:

Jobs					
ID	Job	Description	Create Time	State	Results
#1716	Unit Excel Import	Import given Unit Excel Sheet into Client DC Vermer	24.07.2017 06:36	done	<a href="#">Download</a>

Once the job is finished, the state will change to “done”.

To control, if the import has been successful, click on “Download”.

**If the import was successful:**



In case there has been a problem with the import, the system will indicate the invalid import items in red:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	CONGCODE	ISO_CODE	M_SHIPNO	SURNAME	FIRST_NAME	BORN_ON	SEX	MIN_CODE	BAPT_ON	BAPT_BY	BAPT_PLACE	SEALED_ON	SEALED_BY	SEALED_PLACE	CONTACTNO	DIED_AT	RESADDR
2	1109703	ZM	078-00011	DOE	SYLVIA	09/05/1987	F		19/06/1987	HEINRICH MÜLLER		12/10/1987	HEINRICH MÜLLER				TEPEWEG 3

**Note:** after the import has been completed, the data has to be indexed. Please refer to [chapter 4.7.1](#) for instructions.

### 4.7.3 DBF/OASYS Import

To start an import from an existing OASYS I database, click on “DBF/OASYS Import” in “Actions”:

DBF Import

File (.zip)  Werter.ZIP

Unit Type for Workareas District

Unit Type for Sub Districts Sub District

Unit Type for Congregations Congregation

[Cancel](#)

Select the corresponding .ZIP<sup>1</sup> database for the import and indicate which unit type of the existing OASYS I database corresponds with the following unit types in OASYS III:

- ✓ Unit type for “Work Area” (Apostle District): in general “District”
- ✓ Unit type for sub district: in general “Sub District”
- ✓ Unit type for congregations: in general “Congregation”

Start the import by clicking on “Start Import”.

After a successful data import, the system automatically indexes the data to make the data usable for the reports (please refer to [chapter 4.7.1](#)).

ID	Job	Description	Create Time	State	Results
#1723	Reindexing Events	Indexing Events for Report Usage	24.07.2017 10:48	progress	
#1722	Reindexing Ministers	Index Ministers for Report Usage	24.07.2017 10:48	done	<a href="#">Download</a>
#1721	Reindexing Members	Index Members for Report Usage	24.07.2017 10:48	done	<a href="#">Download</a>
#1720	Reindexing Member Fulltext	Reindexing the Member Search Index	24.07.2017 10:48	done	<a href="#">Download</a>
#1719	DBF Database Import	Import a DBF Database into Client DC Werter	24.07.2017 10:48	done	<a href="#">Download</a>

<sup>1</sup> In case the ending of the file is .zip, please rename the file to .ZIP; the system is not able to import a file with a .zip ending.



#### 4.7.4 Reset client database

Resetting a client database will delete the database of the selected client.

**Attention:** please make sure, that you have selected the correct client in case that various clients exist in an OASYS III installation before you carry out the action!

To reset the database, click on “Reset client database”:

Reset database for client

Confirm ☒ Yes, drop client database

Drop client database
[Cancel](#)

Tick the box and click on “Drop client database”.

Client database dropped	
Clients   List   <a href="#">Create new</a>	
Name	
DC Barrus	
DC Werter	
DC Vermier	

The database is blank now and new data can be imported/created.

#### 4.7.5 Create Portable Container

Portable containers are used to provide an offline OASYS installation on a laptop.

**Note:** before creating a portable container, index the data to ensure that the reports use the last available data.

The portable container is always a snapshot of the database in the moment you create the container. In order to get the latest data for the offline installation, you have to create a new container.

**Attention:** The server only stores the latest version of the portable container. If a new container is created, the old version will be replaced by the newly created.

For further instructions regarding the installation of the portable solution, refer to additional “OASYS Portable” manual (please contact the technical support if you need the additional manual, you will find the contact details in [chapter 12](#)).

To create a new portable container, click on “Create Portable Container” in Actions:

Create OASYS portable container

Start the job, that pack the oasys portable container.

Create OASYS portable container
[Cancel](#)



Click on "Create OASYS portable container" to start the job.

After the job is completed, you have to download the container to install OASYS III offline on a laptop:

Jobs					
ID	Job	Description	Create Time	State	Results
#1735	Portable	Portable Container creation of this OASYS III Installation	26.07.2017 14:01	done	<a href="#">Download</a>

#### 4.7.6 Delete Client

The action "Delete Client" will delete a client completely, including the related data of this client.

**Attention:** please make sure, that you have selected the correct client in case that various clients exist in an OASYS III installation before you carry out the action.

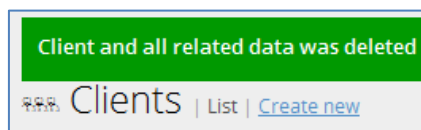
To delete a client, click on "Delete Client" in Actions:

Delete Client

Confirm
☒ Yes, delete the Client and all related Members and Units

Delete Client
[Cancel](#)

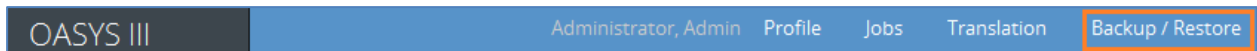
Tick the box and click on "Delete client".





## 4.8 Backup and Restore

To backup or restore a database, click on «Backup / Restore»:



Restore and Backup can be carried out directly on the server where OASYS III is installed or from every device, which is accessing the server via a browser (if the user has the necessary permissions to do so).

### 4.8.1 Backup

#### Create OASYS Backup

Start the job, that Backups the OASYS Database.

Create OASYS Backup
[Cancel](#)

Click on «Create OASYS Backup». The backup is restored on the server and can be downloaded to store it on an external device once the backup job is finished:

Jobs					
ID	Job	Description	Create Time	State	Results
#1736	Database Backup	Backup of the whole OASYS III Database as .sql.gz File	26.07.2017 14:26	done	<a href="#">Download</a>

**Note:** We recommend storing the backup on an external drive for data security reasons.

### 4.8.2 Restore

To restore a database, select the sql.gz file and click on “Restore OASYS Backup”:

#### Restore OASYS Backup

Start the job, that Restores a OASYS Database

Upload .sql.gz

Choose File
No file chosen

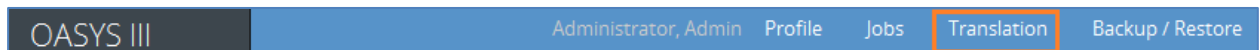
Restore OASYS Backup
[Cancel](#)



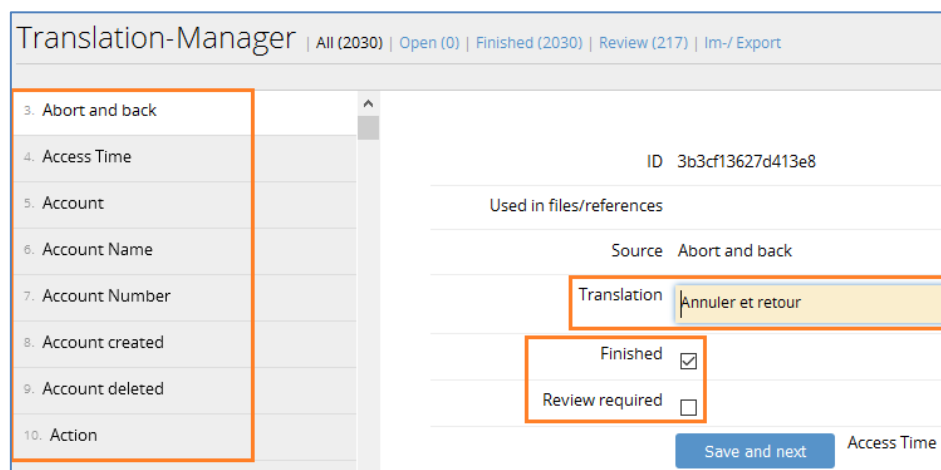
## 4.9 Translation

It is possible to adjust the French translation in the “Translation” section. This translation will only apply to OASYS III where the translation has been made. You can export translations to use them in other installations or import them from another OASYS III installation.

To access the translation function, click on “Translation”:

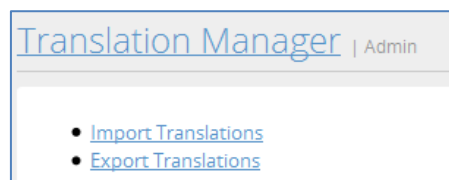


In the translation manager, select the expression, which should be translated:

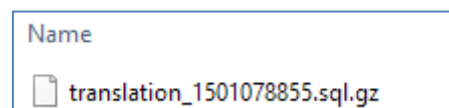


You can indicate, if the translation is finished or if a review of the translation is required.

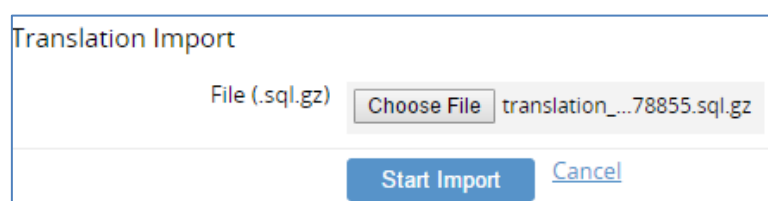
To export the translation, click on “Export”:



The translation is exported into a .sql.gz file:



To import a translation file, click on “Import” and select the corresponding sql.gz file and start the import:





## 5 Managing “Members”

To manage member details in OASYS, click on “Members” in the main menu. In this section, you can search for members and create new members:

### 5.1 Member search

To search for members, a filter has to be set. The following filters are available:

Name (full text search)	Name does not begin with
Member is user	Ministers and working area
Ministry is not	Unit
Unit is not	Member ID
Commission and working area	Age group
Age group is not	Show deceased members

It is possible to combine different filters, for example to search for a specific name (member) in a specific unit:

The filter “Name” offers a full text search. You can, for example, enter the family name of a member or only a part of the name. It is also possible to search for a member entering its family name and given name in order to limit the search result even more:





**Members** | List | [Create new](#) | [Quick create](#)

Add Filter: Name

Name begins with : Term ...  [Filter](#)

Filter: Name begins with sara bonjour x Total: 1 Members found

Name	Unit	Ministry	Date of Birth	Gender	Age	Sealing Date
<a href="#">Bonjour, Sarah</a>	<a href="#">Uresti</a>		02.10.1977	female	38	

You can sort the displayed search result by clicking on the headers of the different columns:

«« | « | 1 | 2 | » | »»

Name	Unit	Ministry	Date of Birth	Gender	Age	Sealing Date
<a href="#">Amorim, Enola</a>	<a href="#">Lamery</a>		05.04.2003	male	13	
<a href="#">Arcega, Guillermina</a>	<a href="#">Lamery</a>	Deacon	12.12.1976	male	39	
<a href="#">Baenziger, Sid</a>	<a href="#">Stoneburner</a>	Deacon	02.08.1999	male	17	
<a href="#">Beckor, Gertrud</a>	<a href="#">Bruker</a>		20.04.1998	female	18	
<a href="#">Biello, Marilyn</a>	<a href="#">Riekert</a>		12.10.1968	male	47	
<a href="#">Bissegger, Sherlyn</a>	<a href="#">Uresti</a>	Evangelist	24.10.1965	male	50	
<a href="#">Blinn, Young</a>	<a href="#">Lamery</a>	Deacon	27.07.1977	male	39	
<a href="#">Bolen, Rory</a>	<a href="#">Bruker</a>	Priest	24.06.1974	male	42	

In the above example, the column “Name” is sorted ascendingly.

## 5.2 Create a new member

To create a new member, open the unit to which the member should be added (congregation) or open the “Members” section in the main menu. Another option to access the “Create new member” function is to open “Add member” in the favorites section in the main menu.

Create a new member out of a unit:

Administrator, Admin | Jobs | Profile | Translation | Backup / Restore | Logout | Last Targets | French | English

**Bogden** Congregation

International Church NAKI » District Church Cropsey » Apostle District Marina » District Banwarth

Unit details [Edit](#)

**Name** Bogden (Congregation)

**ID** 1752

**Parent Unit** [Banwarth](#)

**Unit Actions**

- [Combine Units](#)
- [Move Unit](#)
- [Move Members](#)
- [Add Event Statistics](#)
- [Add Member](#)
- [Add Deposit](#)

Create a new member trough the main menu:

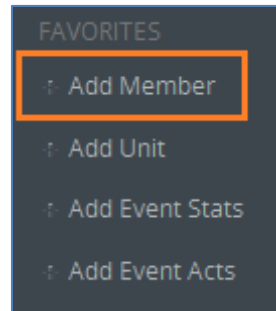
OASYS III  
1.2.2 / 30.08.2016

Administrator, Admin | Jobs | Profile | Translation

**Members** | List | [Create new](#) | [Quick create](#)

Add Filter: Name

Create a new member through “Add Member”: in the favourites section




The following Window will open:

Create new member			
Given name *	<input type="text"/>		
Family name *	<input type="text"/>		
Date of Birth *	dd . mm . yyyy	<input type="text"/>	<input type="checkbox"/> Date of birth confirmed
Unit *	Arterberry » Caneva » Rieber <span style="color: red;">x</span>		
Gender	<input checked="" type="radio"/> male <input type="radio"/> female		
Date Baptism	dd . mm . yyyy	Minister	Congregation
Date Sealing	dd . mm . yyyy	Minister	Congregation
Date Confirmation	dd . mm . yyyy	Minister	Congregation
ID	Automatic allocation		
Ministry	Optionally <input type="text"/>		
<input type="checkbox"/> Create another Member			
<input type="button" value="Save Member"/>		<a href="#">Cancel</a>	

The following data fields are mandatory:

- Given Name
- Family Name
- Date of Birth
- Unit / Congregation

- ✓ Write the **given name** and the **family name** in the appropriate fields.
- ✓ Enter the **date of birth** of the member. There is a built in Calendar in the field "Date of Birth" .

If the birth date is confirmed, check the box "Date of birth confirmed"

- ✓ Choose the **congregation** of the member. The field "Congregation" is a search box; just start typing to search for the congregation. In case you access the "Create member" function by a unit, this field is already prefilled, see the example above.

You can record the other fields as needed:



- ✓ Select the **gender of the member**.
- ✓ Enter the **date of baptism**, the minister who performed the act and the place where the act took place.  
Depending on the client settings, the fields “Minister” and “Congregation” are free from fields or search boxes where the user chooses the congregation and the minister from the recorded data. The same applies for date of sealing and confirmation.
- ✓ Depending on the configuration of the installation, the **member ID** is generated automatically by the system or has to be entered manually.
- ✓ If the member to be recorded has a **ministry**, this can already be entered in this mask:

Ministry	Priest	▼
Working area*	Type for search	
Start date*	dd . mm . yyyy	📅
Officiant	Type for search	
Congregation	Type for search	

To add a ministry:

- Choose the actual ministry of the member
  - Select the working area
  - Enter the start date of the ministry
  - Enter the officiant who ordained the member in the ministry
  - Enter the congregation where the ordination took place.
- ✓ **Create another member** checkbox: if you activate the check box “Create another Member”, the data entry screen is opened after saving the record by clicking on “Save member” and you can enter the next member.
  - ✓ **Save Member:** clicking the “Save Member” button ensures that the data is written into the database.

After saving a new member, the system opens the **member mask** where you can record additional information (refer to [chapter 5.3](#)):

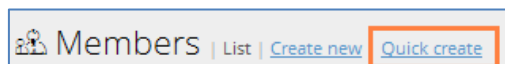


» Currin, Rick Priest

<b>Personal Details</b> <a href="#">Edit</a> <b>Name</b> Currin, Rick <b>Birthday</b> 08.08.1959 <b>Gender</b> male <b>ID</b> 17785 <b>Unit</b> <a href="#">Erker (Congregation)</a> <a href="#">Change</a>	<b>Contact Details</b> <a href="#">Add</a> <b>Business</b> +1 987 654 <a href="#">Edit</a>   <a href="#">Delete</a> <b>Mobilephone</b>	<b>Member Actions</b> <ul style="list-style-type: none"> <li><a href="#">Add Deposit</a></li> <li><a href="#">Delete Member</a></li> <li><a href="#">Change Unit</a></li> <li><a href="#">PDF Profil</a></li> <li><a href="#">History</a></li> </ul>																		
<b>Household</b> <a href="#">Create new</a> Create a new household or assign the member to an existing household	<b>Commissions</b> <a href="#">Add</a> <b>Depositor</b> 01.01.2015 <a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a> <a href="#">Caneva</a>		<b>System Account</b> <a href="#">Add</a> Add a system account for the member in order to grant the member access to the system as a user.																	
<b>Civil status</b> <a href="#">Change</a> <b>Civil status</b> <b>Date</b> married 09.06.2016	<b>Ministries</b> <a href="#">Add</a> <table border="1"> <thead> <tr> <th>Ministry Type</th> <th>Unit</th> <th>Place of Act</th> <th>Start date</th> <th>End date</th> <th></th> </tr> </thead> <tbody> <tr> <td>Priest</td> <td></td> <td></td> <td>09.06.2016</td> <td></td> <td><a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a></td> </tr> <tr> <td><a href="#">Add Working Area</a></td> <td><a href="#">Erker (Congregation)</a></td> <td></td> <td>09.06.2016</td> <td></td> <td><a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a></td> </tr> </tbody> </table>		Ministry Type	Unit	Place of Act	Start date	End date		Priest			09.06.2016		<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>	<a href="#">Add Working Area</a>	<a href="#">Erker (Congregation)</a>		09.06.2016		<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>
Ministry Type	Unit	Place of Act	Start date	End date																
Priest			09.06.2016		<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>															
<a href="#">Add Working Area</a>	<a href="#">Erker (Congregation)</a>		09.06.2016		<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>															

### 5.2.1 „Quick Create“ function

The “Quick Create” function allows to record one or various members with a limited data set. To access the function please select “Members” in the main menu:







The following window will open:

Members | [List](#) | [Create new](#) | [Quick create](#)

Create new member

Numeric Member IDs will be automatically generated

Given name *	Family name *	Gender *	Date of Birth * / confirmed?	Unit *
Joe	Family name	Please select ▼	dd - mm - yyyy  	Type for search
Given name	Family name	Please select ▼	dd - mm - yyyy  	Type for search

[Save Members](#) [Cancel](#)

You only have to record the following information:

- Given name / Family name
- Gender
- Date of Birth / Confirmed (Date of Birth)
- Unit/Congregation

## 5.3 Maintaining General member data

### 5.3.1 Personal details

In this section, you can record or update the **personal details** of a member. These include all the sacrament acts of a member and the dates of birth and death.



Personal Details <a href="#">Edit</a>	
<b>Name</b>	Currin, Rick
<b>Birthday</b>	08.08.1959
<b>Gender</b>	male
<b>ID</b>	17785
<b>Unit</b>	<a href="#">Erker (Congregation)</a> <a href="#">Change</a>

In order to update recorded data, click on **Edit**.

Here the congregation of the member can also be updated. (Click on **Change**)

### 5.3.2 Contact Details

In this section, you can capture or update the **contact details** of a member, for example phone numbers and E-Mail.

Contact Details <a href="#">Add</a>	
<b>Business</b>	+1 987 654
<b>Mobilephone</b>	<a href="#">Edit</a>   <a href="#">Delete</a>

In order to capture additional contact information, click on **“Add”**.

In order to update or delete recorded data, click **“Edit”** or **“Delete”**

### 5.3.3 Household

In this area, you can add a member to a household (family), this allows you to identify the members of a family easily:

Household <a href="#">Move to Household</a>   <a href="#">Move to new Household</a>   <a href="#">Leave Household</a>   <a href="#">Delete Household</a>	
<b>Address</b> <a href="#">Edit</a>	<b>Members</b>
Eagelson Avenue	<a href="#">Currin, Rick</a>
Canada	



### 5.3.3.1 Create a new household

Household **Create new** Assign to existing

To create a new household click on “**Create New**”.

The following page will open:

Create new Household

Head of Household
☐ Yes

Addressline 1

Addressline 2

Addressline 3

Addressline 4

Country \*  
Please select

Save Household

Cancel

To create a new household, you must tick the box “Head of Household”. If you don’t check this box, this household will not be eligible as household for other members.

Add the address for this household and click on “Save Household”.

After saving the household, you can add other members to this household.

Instead of using four address lines, it is also possible to register the address with traditional address data. You can adjust this setting in the client settings by the system administrator (refer to [chapter 4.2.3](#)):

Create new Household

Head of Household
☐ Yes

Street, Hausenumber \*

City \*

Zipcode \*

Country \*  
Please select

Save Household

Cancel



### 5.3.3.2 Assign/Move a member to an existing household


If you assign a member to an existing household for the first time, click on “Assign to existing”<sup>2</sup>:

Household [Create new](#) | [Assign to existing](#)

If you have already assigned the member to a household and want to change it, then choose the option “Move to household”:

Household [Move to Household](#) | [Move to new Household](#) |  
[Leave Household](#) | [Delete Household](#)

To move a member to an existing household (via “Assign to existing” or “Move to household”), you must select an existing household in the following window. To search for a household, you have to start typing the name of the head of household:

 » Currin, Stephanie

---

**Assign Household**

Assign Household by Head of Household Member Name

Household \*

[Pr. Currin, Rick](#) 1959-08-08 - Erker

[Assign Household](#) [Cancel](#)

Now the member is shown as member of the selected household:

Household [Move to Household](#) | [Move to new Household](#) |  
[Leave Household](#) | [Delete Household](#)

---

**Address** [Edit](#)

Eagelson Avenue

---

**Members**

[Currin, Rick](#)  
[Currin, Stephanie](#)

<sup>2</sup> The option “Assign to existing” is only available if there is already at least one household recorded in the OASYS III installation. If there is no household recorded, only the option “Create new” will be available.



### 5.3.3.3 Edit an existing household

Household <a href="#">Move to Household</a>   <a href="#">Move to new Household</a>	
<a href="#">Leave Household</a>   <a href="#">Delete Household</a>	
<b>Address</b> <a href="#">Edit</a>	<b>Members</b>
Eagleson Avenue	<a href="#">Hujer, Taren</a>

The following actions are available:

- ✓ Move to household (refer to [chapter 5.3.3.2](#))
- ✓ Move to new household: creates a new household for the member (refer to [chapter 5.3.3.1](#)), this action will delete the existing household.
- ✓ Leave household: the member will no longer be assigned to the household
- ✓ Delete household: the household will be deleted from the database





### 5.3.4 Commissions

In this area, you can assign a commission to a member:

Commissions		
Depositor	01.01.2015	<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>
<a href="#">Caneva</a>		

To add a commission click to the link “**Add**”.

To modify existing commissions, use “**Edit**”, “**End**” or “**Delete**”

Examples for commissions are congregation rector, district leader, depositor etc. as well as administrative functions for the OASYS installation, for example date entry.

For every client you can manage the available commissions (refer to [chapter 4.3.2.1](#)). For each commission, you can assign permissions to access the system (refer [to chapter 4.5.3](#)).

To add a commission, you have to enter the following data:

Create new Commission

Commission Type \* Please select

Commission for Unit \* Type for search

Start date \* 17 . 07 . 2017

Save Commission [Cancel](#)

In the field “Commission Type”, select the commission which should be assigned to the member.

Then you enter the unit (congregation, district ...) for which the commission will be active and a start date.

The unit, which you have assigned as commission unit, can also be used to restrict the access for users in the OASYS installation. Please refer to [chapter 4.5.4](#) for restricted user access through commission units.



### 5.3.5 Civil status

In this section, you can enter the civil status of a member:

Civil status <a href="#">Change</a>	
Civil status	Date
married	09.06.2016

The following options are eligible:

- ✓ Single
- ✓ Married
- ✓ Divorced
- ✓ Undisclosed
- ✓ Widowed

You have to enter an event date to change a civil status, unless the selected status is “single”.

You can also configure the available options to fit the needs of the local installation (refer to [chapter 4.3.2.3](#)).

It is also possible to deactivate the whole section of civil status if needed (refer to [chapter 4.2.3](#)).

### 5.3.6 System account (User account)

In this area, you can add and maintain the system account (user account):

System Account <a href="#">Edit</a>   <a href="#">Delete</a>
E-Mail: test@oasys.network

If a member should be a user of OASYS III, you have to open a system account. Only a system administrator can open a system account, therefore please refer to [chapter 4.5.1](#).



## 5.4 Ministry and working area

In this section, you enter and maintain the ministry and working area of a member:

Ministries <a href="#">Add</a>				
Ministry Type	Unit	Place of Act	Start date	End date
Priest			09.06.2016	<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>
<a href="#">Add Working Area</a>	<a href="#">Erker (Congregation)</a>		09.06.2016	<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>

Both sections, “Ministry” and “Working Area” can be maintained separately.

### 5.4.1 Add a ministry

To add a ministry for the member, click “**Add**”.

The following window will open:

### Create new Ministry

New ordination
☒ Create new Ordination and end all other Ministries for this Member

Ministry Type \*

Please select

Start date \*

17 . 07 . 2017

Working Area \*

Type for search

Officiant

Type for search

Place of Act

Type for search

Save Ministry

[Cancel](#)

It is important to set the flag “Create new Ordination and end all other Ministries for the member”. If you don’t set the flag, the former ministry will not be ended and the member has two active ministries.

The following data is mandatory:

- Type of ministry
- Start date (date of ordination)
- Working Area.

The other fields are optional.

Close the action by clicking on the “Save Ministry” button.



## 5.4.2 Maintenance of an existing ministry

To maintain an existing ministry, the following options are available:

Ministries <a href="#">Add</a>					
Ministry Type	Unit	Place of Act	Start date	End date	
Priest			09.06.2016		<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>
<a href="#">Add Working Area</a>	<a href="#">Erker (Congregation)</a>		09.06.2016		<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>

### 5.4.2.1 Edit a ministry

Edit ministry

Remove end date ☐ Yes, remove end date

Officiant

Place of Act

[Update Ministry](#) [Cancel](#)

The flag “Yes, remove end date” is used in case the ministry has been ended by mistake. If this flag is set and the ministry updated, the end date of the ministry is removed and the ministry is set as active (as well as the end date of the working area of this ministry).

### 5.4.2.2 End a ministry

End Ministry

Ministry Deacon

Working Area Arterberry

End date \* 22 . 06 . 2017

Purpose for Ministry End Please Select

[End Ministry](#) [Cancel](#)

To end a ministry, you have to enter an end date and choose a purpose:

- ✓ Retired
- ✓ Resigned
- ✓ Removed
- ✓ Leave of absence

According to the needs of the local installation, further options can be added by a system administrator (refer to [chapter 4.3.2.5](#)).



### 5.4.2.3 Delete a ministry

Delete Ministry

Ministry Type Priest

Working Areas Bogden

Delete Ministry Cancel

If needed, you can delete a ministry. For the ministry history, however, it is recommended to end a ministry instead of deleting it.

### 5.4.3 Add and maintain working areas

To add or maintain the working area, the following options are available:

Ministries <a href="#">Add</a>				
Ministry Type	Unit	Place of Act	Start date	End date
Priest			09.06.2016	<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>
<a href="#">Add Working Area</a>	<a href="#">Erker (Congregation)</a>		09.06.2016	<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>

#### 5.4.3.1 Add an additional working area

A minister can be active in more than one units. Therefore, it is possible to add various working areas.

To add an additional working area, click on “**Add Working Area**”:

Add Working Area

Working Area \*

Start date \* 22 . 06 . 2017

Officiant

Save Working Area Cancel

You have to enter the following mandatory data:

- ✓ a working area (congregation, district, apostle area,...)
- ✓ and a start date

In addition, you can enter the officiant who assigned the minister to the working area.

Close the action by clicking on the “Save Working Area” button.



### 5.4.3.2 Edit a working area

You can edit the following data in the dialog:

Edit Working Area	
Start date *	09 . 06 . 2016
Working Area *	Arterberry (Congregation) » Caneva » Rieber <span style="color: red;">X</span>
Remove end date	<input type="checkbox"/> Yes, remove end date
Officiant	Type for search
<div>Update Working Area</div> <div>Cancel</div>	

If the history of working areas of a minister should be available in the future, it is recommended to add a new area instead of editing the existing working area. To avoid that the ministry is ended while editing the working areas, the user has to add a new working area first (refer to [chapter 5.4.3.1](#)) and end the former one (refer to [chapter 5.4.3.3](#)) afterwards.

### 5.4.3.3 End a working area

To end a working area, enter an end date:

End Working Area	
Name	Deacon
End date	22 . 06 . 2017
<div>End Working Area</div> <div>Cancel</div>	

If the last working area of a minister is ended, the ministry will be ended as well. Every ministry must have at least one active working area.

### 5.4.3.4 Delete a working area

Delete Ministry	
This deletes a working area. If the last working area got deleted, the whole ministry disappears.	
Name	Arterberry
Ministry	Deacon
Working area	Congregation Arterberry
<div>Delete Ministry</div> <div>Cancel</div>	

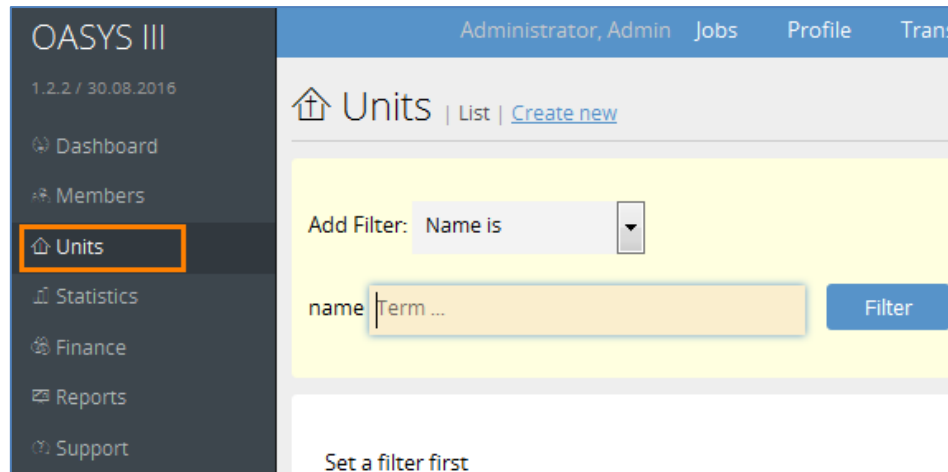
If needed, you can delete a working area. For the working area history, however, it is recommended to end a working area instead of deleting it.

If the last working area of a minister is ended, the ministry will be deleted as well.

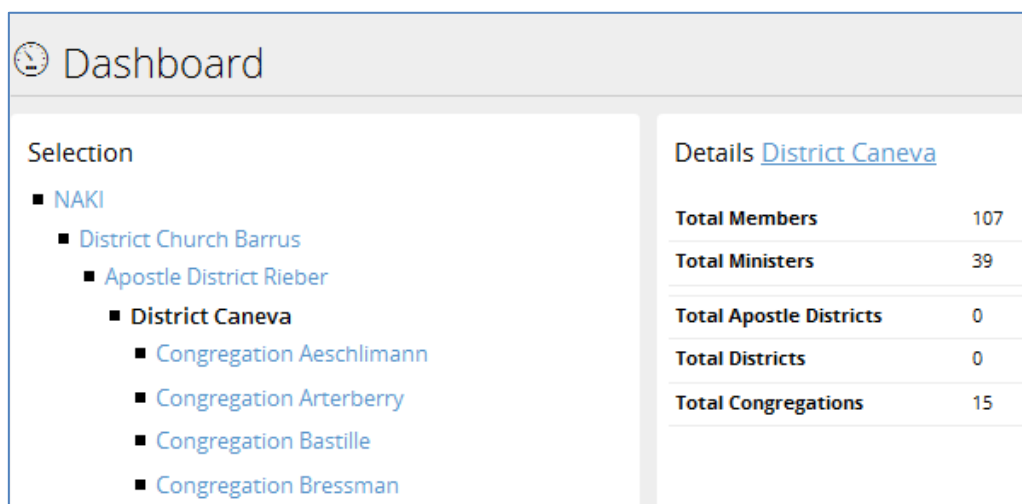


## 6 Managing Units

To access units in OASYS, click “Units” on the main menu. In this section, you can search for units and create new units:



You can also access Units via the dashboard:



### 6.1 Unit search

To search for units, you have to set a filter. The following filters are available:

Parent Unit is	Parent Unit is not
Name is (full text search)	Name is not
City is <sup>3</sup>	City is not <sup>3</sup>
Property type is	Property type is not
Unit type is	Unit type is not
Show closed units	

<sup>3</sup> This filter is only available if the setting for properties is not set to “Use 4 address lines instead of specific fields for Properties” (refer to [chapter 4.2.4](#)).



To search for a specific unit (congregation, district, ...) type the name or part of the name in the field “**name**” and click “**Filter**”:

Units | List | [Create new](#)

Add Filter: Name is ▼

name Ba  Filter

It is possible to combine several filters to limit the search result, for example to show all church owned buildings in a specific district:

Units | List | [Create new](#)

Add Filter: Property type is ▼

property type Own Building ▼ Filter

Filter: Parent Unit is District Caneva x Property Type is Own Building x

<a href="#">Name ↑</a>	<a href="#">Type</a>	<a href="#">Parent</a>
<a href="#">Arterberry</a>	Congregation	<a href="#">Caneva (District)</a>

You can sort search results by clicking on the column headers:

Filter: Name begins with ba x

<a href="#">Name ↑</a>	<a href="#">Type</a>	<a href="#">Parent</a>
<a href="#">Barbadillo</a>	Congregation	<a href="#">Schaer (District)</a>
<a href="#">Barns</a>	Congregation	<a href="#">Schroeder (District)</a>
<a href="#">Barrus</a>	District Church	<a href="#">NAKI (International Church)</a>
<a href="#">Bastille</a>	Congregation	<a href="#">Caneva (District)</a>

In the above example, the search result is sorted ascendingly according to the column “Name”.

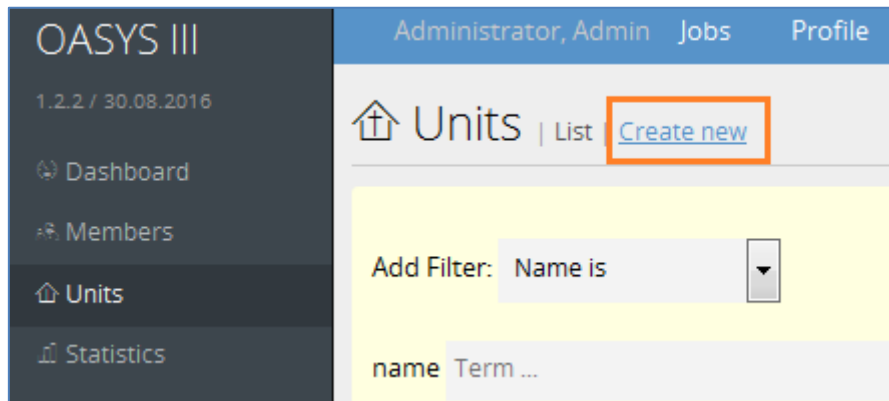




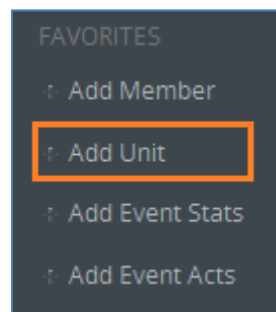
## 6.2 Create a new unit

To access the “Create new” function the user has two possibilities:

Through the “Unit” section in the main menu:



Or through “Add unit” in the favorites in the main menu:



The following window will open:

Create new unit

Name \*

Unit Type \*

Please select

Opening date

11 . 07 . 2017

ID

665955

Parent Unit \*

Type for search

Add Commissions

☐ Yes

Address book

☐ Yes, show in Address book

Save Unit

[Cancel](#)



- ✓ Add the “**Name**” of the unit
- ✓ Select the “**Unit Type**”
- ✓ Enter the correct “**Opening date**” (the date is prefilled with the current date at the moment the unit is recorded) or leave it unchanged
- ✓ **ID** is predefined by the system but can be adapted manually if needed
- ✓ Select a “**Parent Unit**”

After these steps, you can save the new unit.

In case the OASYS III installation is connected to the internet, it is possible to show the congregation in the official NAC address book. In this case, in the property section of the unit longitude and latitude have to be added, (refer to [chapter 6.3.8](#)). If the unit should be shown, the flag “**Show in address book**” has to be set.

In case you need to add a **commission** (exp. rector, district leader, depositor ...), check the checkbox “Yes”. To do so, the member to which the commission should be assigned to has to be registered in the system. The following window will open:

Add Commissions ☒ Yes

---

Commission

Rector

▼

Hujer, Taren Bogden | Private Mobilephone: +1 234 567 89

X

Choose the “Commission” type and select the member to which the commission should be assigned. It is possible to add various commissions in this dialogue.

For commissions also refer to [chapter 5.3.4](#).

### 6.2.1 Special Unit “Transfers”

In every new OASYS III database, you can find a special unit “Transfers”:

Selection	Details <a href="#">Special Transfers</a>										
<ul style="list-style-type: none"> <li>■ <b>NAKI</b> <ul style="list-style-type: none"> <li>■ <b>Special Transfers</b></li> </ul> </li> </ul>	<table> <tr><td>Total Members</td><td>0</td></tr> <tr><td>Total active Ministers</td><td>0</td></tr> <tr><td>Total Apostle Districts</td><td>0</td></tr> <tr><td>Total Districts</td><td>0</td></tr> <tr><td>Total Congregations</td><td>0</td></tr> </table>	Total Members	0	Total active Ministers	0	Total Apostle Districts	0	Total Districts	0	Total Congregations	0
Total Members	0										
Total active Ministers	0										
Total Apostle Districts	0										
Total Districts	0										
Total Congregations	0										

You can use this special unit for member transfers outside the client. If for example a member transfers to another District Apostle Area, you can transfer the member to the congregation “Transfer” in order to keep the membership database up to date and send the member profile to the new area.



In case the units have been imported and there is a need for a “Transfer Congregation”, you can create a new unit with the following settings:

Create new unit

Name \* Transfers

Unit Type \* Special

Opening date 01 . 01 . 2017

ID 665962

Parent Unit \* NAKI (International Church)

Add Commissions ☐ Yes

Address book ☐ Yes, show in Address book

Save Unit Cancel

As “Unit Type” please choose “Special” and for the “Parent Unit” NAKI because this unit should not be part of the Local Church or District Apostle Area in order to exclude these transferred members in reports and analysis.

### 6.3 Maintaining unit data

According to the unit type of the selected unit, the information shown in the unit dashboard varies. In the unit dashboard, you can maintain and edit the information regarding a unit.

As an example the dashboard of a congregation:

» Arterberry Congregation

International Church NAKI » District Church Barrus » Apostle District Rieber » District Caneva

Unit details Edit

Name Arterberry (Congregation)  
ID 1232  
Parent Unit Caneva

Unit Actions

- Combine Units
- Move Unit
- Move Members
- Add Event Statistics
- Add Member
- Add Deposit

Members

- 16 Members
- 6 active Ministers in this working area

Subunits

Shows subunits belonging to the displayed unit

Event Times Add

Manage Event Times for this Unit

Report

- Member Report (full)
- Ministry Report (full)

Commissions Add

Congregation Rector Gotshall, Peter Edit | End | Delete  
Private Mobilephone: +1 234 5678  
E-Mail: gotshall@yahoo.com  
Data Entry Gotshall, Ruth Edit | End | Delete  
Offering/Attendance  
No Contact Details added yet

Ministers Assign

Evangelist	01.06.2016	Gotshall, Peter
Priest	09.06.2016	Beyers, Lurlene
Priest	09.06.2016	Wisbey, Jacquette
Deacon	09.06.2016	Grenway, Raymundo
Deacon	09.06.2016	Steenhard, Reinhold
Deacon	01.01.2017	User Test

Property Add

Own Building Edit | Delete

History Details

Action	Action Date	Action Account
Created Voucher Range	13.10.2016 09:39	admin@naasys.network (Administrator, Admin)
Edited Event Time	13.10.2016 09:06	admin@naasys.network (Administrator, Admin)

Voucher Range Create

From	To	Full		
106-5608201	106-5608300	no	Edit	Delete
000-5708680	000-5708700	no	Edit	Delete



### 6.3.1 Unit details

In this section, you can record and update the unit details:

» Arterberry Congregation

International Church NAKI » District Church Barrus » Apostle District Rieber » District Caneva

Unit details [Edit](#)

Name	Arterberry (Congregation)
Opening date	01.06.2002
ID	1232
Parent Unit	<a href="#">Caneva</a>

By a click on the parent unit link(s) you can switch to the District or a higher unit level.

In order to update the recorded unit details, click **“Edit”**.

You can edit the following information:

- Name
- Opening Date
- ID
- Unit Type
- Date closed
- Address book flag

#### 6.3.1.1 Closing a unit

To close a unit, click “Edit” in the Unit details and enter a closing date for the unit:

Edit unit

Name \* Demars

Unit Type \* Congregation

Opening date \* 01 . 01 . 2015

Date closed dd . mm . yyyy

ID 2868

Address book ☐ Yes, show in Address book

[Update Unit](#) [Cancel](#)

To complete the action, click “Update Unit”.

**Note:** It is not possible to close a unit when active commissions for this unit exist.

A special case is the closing of a congregation. It is not possible to close a congregation if there are still members registered:



Edit unit

Name \*

Demars

Unit Type \*

Congregation

Opening date \*

01 . 01 . 2015

Date closed

01 . 01 . 2017

Unit can not be closed if it holds members

To move the members, choose the “Move Members” action in the “Unit Actions section” (please [refer to chapter 6.4.3](#)).

### 6.3.2 Members

Members

- [16 Members](#)
- [6 active Ministers in this working area](#)

This section shows the number of members and active ministers of a given unit. Clicking on the links, displays a list with all members (or active ministers).

### 6.3.3 Subunits

Subunits	
<a href="#">Aeschlimann</a>	Congregation
<a href="#">Arterberry</a>	Congregation
<a href="#">Bastille</a>	Congregation
<a href="#">Bressman</a>	Congregation

This section of the dashboard shows the subunits of a specific unit. The above example shows the subunits (congregations) of a district.

Clicking the blue link of a subunit opens the dashboard of the selected unit.

### 6.3.4 Event Times

Event Times <a href="#">Add</a>			
Divine Service Sunday	21.02.2016 - 10:00:00	repeat	<a href="#">Edit</a>   <a href="#">Delete</a>
Divine Service Weekday	01.01.2016 - 20:00:00	repeat	<a href="#">Edit</a>   <a href="#">Delete</a>

In this section, you can add or edit the event times of a specific unit.

In order to capture additional event times, click on “**Add**”.

In order to update or delete recorded event times, click “**Edit**” or “**Delete**”



Event times play a special role in the recording of attendance and offerings. If you track the event type for offering/attendance, the event times are used as a control for the data entry. If for example a weekday (Thursday instead of Wednesday) is chosen while entering data for a congregation for which there is no event time registered in the system, the system will issue a warning as soon as the user tries to save the record:

Congregation * Bastille » Caneva » Rieber		X
Event Date *	10 . 03 . 2016	No Event Time for this Date in Unit. Resend form to create Event for this date anyways
Event Type *	Divine Service Weekday	

If needed, you can disable this warning. Please refer to [chapter 4.2.2](#) for the configuration .

### 6.3.5 Reports

**Report**

- [Member Report \(full\)](#)
- [Ministry Report \(full\)](#)
- [Attendance Trend](#)
- [Congregation Profile](#)
- [District Leaders](#)
- [Member Report \(active, sealings, death\)](#)
- [Minister Change Report](#)
- [Activity Report](#)
- [All Reports](#)

In this section, you can open the reports of the displayed unit. The report selection in this section varies according to the unit type of the displayed unit. The above example shows the reports of a district.

Clicking on a report (with exception of “All Reports”) prefills the report with the unit from which you have opened the report:

**Minister Change Report** | [Excel Export](#) | [PDF Export](#)

---

Unit: Caneva (District) » Rieber » Barrus

X Group by District

Time Range From: 01 . 01 . 2015 To: 31 . 12 . 2015 [Show](#)

For more information regarding reports, refer to [chapter 11](#).



### 6.3.6 Commissions

This section of the dashboard shows the commissions assigned for a specific unit:

Commissions <a href="#">Add</a>	
<b>Congregation Rector</b> <a href="#">Gotshall, Peter</a>	<a href="#">Edit</a>   <a href="#">End</a>   <a href="#">Delete</a>
Private Mobilephone:	+1 234 5678
E-Mail:	gotshall@yahoo.com

In order to capture additional commissions, click on **“Add”**.

In order to update, end or delete recorded commissions, click **“Edit”** **“End”** or **“Delete”**

Clicking on the link of the member opens the member dashboard, where you can add or update contact information ([refer to chapter 5.3.2](#)). You can also edit the commission of a member directly in the member section ([refer to chapter 5.3.4](#)).

To add a new commission for the displayed unit, click “Add”. The following window will open:

Create new Commission

Commission Type *	Please select	▼
Member for Commission *	Type for search	
Start date *	17 . 07 . 2017	📅
<a href="#">Save Commission</a>		<a href="#">Cancel</a>

You have to enter the type of the commission, the member to which the commission should be assigned and a start date for the commission.

This action creates a new entry in the commission section of the congregation as well as in the commission section of the selected member.



### 6.3.7 Minister

This section shows the Minister of the displayed unit (Ministers that have the displayed unit registered as their working area):

<b>Ministers</b> <a href="#">Assign</a>		
<b>Priest</b>	09.06.2016	<a href="#">Gajica, Salena</a>
<b>Priest</b>	05.12.2014	<a href="#">Hawkinson, Maris</a>
<b>Priest</b>	09.06.2016	<a href="#">Ostroff, Jewel</a>
<b>Deacon</b>	09.06.2016	<a href="#">Haliburton, Fernando</a>

In order to add an additional minister to the displayed unit, click **“Add”**.

**Assign Minister to Unit**

Minister \*

[Cancel](#)

Assigning a minister to the unit will create an additional working area in the ministry section of the selected minister.

### 6.3.8 Property

In this section, you can record or maintain the property information of a congregation:

**Property** [Add](#)

Own Building [Edit](#) | [Delete](#)

In order to capture a property, click on **“Add”**.

In order to update, end or delete a recorded property, click **“Edit”** **“End”** or **“Delete”**

The property section contains the following information:

- ✓ Property type
- ✓ Address (4 lined or traditional data)
- ✓ Country
- ✓ Start date
- ✓ Latitude and Longitude (for the international address book)

To create a new property, click on **“Add”**. The following page will open:





Create new Property

Property Type \* Please select ▼

Addressline 1

Addressline 2

Addressline 3

Addressline 4

Country \* Please select ▼

Start date \* 17 . 07 . 2017 📅

End date dd . mm . yyyy 📅

Latitude

Longitude

Primary? ☒ Yes

Save Property [Cancel](#)

Instead of using four address lines, it is also possible to register the address with traditional address data:

Create new Property

Property Type \* Please select ▼

Street, Housenumber \*

City \*

Zipcode

Country \* Please select ▼

Start date \* 17 . 07 . 2017 📅

End date dd . mm . yyyy 📅

Latitude

Longitude

Primary? ☒ Yes

Save Property [Cancel](#)

You can adjust this setting in the client settings (refer to [chapter 4.2.4](#)). It is also possible to add further property types if needed (refer to [chapter 4.3.3.2](#)).



### 6.3.9 History

This section shows the last five editing actions of a unit:

History <a href="#">Details</a>		
Action	Action Date	Action Account
Edited a Unit	11.07.2017 14:12	admin@oasys.network (Administrator, Admin)
Created Voucher Range	13.10.2016 09:39	admin@oasys.network (Administrator, Admin)

Click on details will display the full editing history of the displayed unit.

The information contains the type of action, the date and the user, which has performed the action.

### 6.3.10 Voucher Range

In this section, you specify the range of the vouchers used in a congregation or district if this information is available.

Voucher Range <a href="#">Create</a>		
From	To	Full
106-5608201	106-5608300	no
		<a href="#">Edit</a> <a href="#">Delete</a>

In order to be able to register a voucher range, you have to specify the length of the voucher number in the client settings (refer to [chapter 4.2.2](#)).

To enter a voucher range, click “create”:

Create new Voucher Range

From \* 100-0000001

To \* 100-0000200

Save Voucher Range [Cancel](#)

Voucher ranges are used to control if a congregation has sent all the vouchers from the booklet to the administration office.

The default setting in a client makes it mandatory to enter a voucher range for every congregation in order to enable the data entry for offerings/attendance. It is not possible to enter



offerings/attendance vouchers in a congregation, until you have specified a voucher range for the congregation:

Add Event Statistics

Congregation *	Wunderly » Caneva » Rieber	x
Event Date *	17 . 07 . 2017	
Event Type *	Divine Service Weekday	
Offering *	20 USD	
Total attendance *	5	
Adults	5	
Children	0	
Guests	0	
Officiant	Type for search	
Voucher No. *		You need a voucher range to create an Event

When all voucher numbers have been used as specified in the voucher range, the system indicates that the voucher range has been used and it is not possible to enter offerings/attendance data until a new voucher range has been entered.

Voucher Range			Create
From	To	Full	
100-0000001	100-0000003	yes	<a href="#">Edit</a> <a href="#">Delete</a>

This mandatory setting can nevertheless be set aside by the system administrator in cases where the information which voucher booklet has been distributed to which congregation is not available (refer to [chapter 4.2.2](#)).

### 6.3.11 Bank Account (only on Local Church level)

On Local Church level, it is possible to record bank accounts:

Bank Account			Create
Type	Account Number	State	
offerings	12345678	open	<a href="#">Edit</a>

Bank accounts are needed to register deposits for the voucher – deposit reconciliation (refer to [chapter 9.1](#)).



To add a new account, click “Create”:

Create new Bank Account

Bank Account type \*
Please select

Account Name \*

Account Number \*

Bank Number \*

State
open

Notes

Opening date \*
17 . 07 . 2017

Date closed
dd . mm . yyyy

Save Bank Account
Cancel

If needed, you can add additional bank account types (refer to [chapter 4.3.1.4](#)).



## 6.4 Unit Actions

You can access unit actions in the unit dashboard:

### Unit Actions

- [Combine Units](#)
- [Move Unit](#)
- [Move Members](#)
- [Add Event Statistics](#)
- [Add Member](#)

### 6.4.1 Combine Units

In case of a merger of two or more units, you can do this via the action “Combine Units”. It is only possible to merge units of the same unit type, exp. Congregations.

As a first step, you have to select the units to merge:

### Combine Units

You can only combine Units with the same type.

Unit to Merge	Frasso (Congregation) » Polissant » Rieber	X
Unit to Merge	Fouyer (Congregation) » Landress » Rieber	X
Unit to Merge	<input type="text" value="Type for search"/>	
Unit to Merge	<input type="text" value="Type for search"/>	
Unit to Merge	<input type="text" value="Type for search"/>	

Combine Units
[Cancel](#)

In the next step, you have to determine which unit master data and property should be used and if the ministries and commissions should be transferred to the merged unit:

### Reassign ( Fouyer, Frasso )

Unit Masterdata from	Fouyer <span style="float: right;">▼</span>
Primary property	(3c64ee1c766d3217) <span style="float: right;">▼</span>
Ministries	Move to combined Unit <span style="float: right;">▼</span>
Commissions	Move to combined Unit <span style="float: right;">▼</span>

Reassign Unit
[Back](#) | [Cancel](#)



In the next step, you have to confirm the merger:

Confirm combine Units		
Unit Masterdata	<b>Name</b>	Fouyer
	<b>Date Opened</b>	
	<b>Date Closed</b>	
	<b>ID</b>	2236
	<b>Unit Type</b>	Congregation
	<b>Parent Unit</b>	Landress
Unit Details	<b>Primary Property</b>	(3c64ee1c766d3217)
	<b>Ministries</b>	Move to combined Unit
	<b>Commissions</b>	Move to combined Unit
After submitting the units will be combined		<a href="#">Back</a>   <a href="#">Cancel</a>

In case a new unit is created out of the merger, you have to select “Create new master data” in the second step and enter the following information:

Confirm combine Units		
Name	<input type="text"/>	
Unit Type	Please select <input type="button" value="v"/>	
Opening date	23 . 09 . 2017 <input type="button" value="calendar"/>	
Date closed	dd . mm . yyyy <input type="button" value="calendar"/>	
ID	665963	
Parent Unit	<input type="text" value="Type for search"/>	
Unit Details	<b>Primary Property</b>	(3c64ee1c766d3217)
	<b>Ministries</b>	Move to combined Unit
	<b>Commissions</b>	Move to combined Unit
After submitting the units will be combined		<a href="#">Back</a>   <a href="#">Cancel</a>

This action results in the creation of a new unit in the selected parent unit.

**Attention:** using the “Combine Unit” action will eliminate the whole event history of the units that will be merged! The result of the “Combine Unit” action is always the creation of a new unit without any history!



### 6.4.2 Move Unit

With the action “Move Unit”, you can assign the displayed unit to another parent unit.

To do so, select the unit that has to be assigned to another parent unit and click “Move Unit” in the unit actions. The following window opens:

Move Unit

New Parent Unit

Move Unit
[Cancel](#)

Select the new parent unit. Clicking on “Move Unit” will save the action and the unit is assigned to the chosen parent unit.

### 6.4.3 Move Members

This action allows moving all members of the displayed congregation to another congregation.

You can use this action to move all the members of a congregation that is to be closed.

To do so, open the unit from which the members should be moved and click on “Move Members” action item. The following window opens:

Move Members to another Unit

New Unit

Move Members to Unit
[Cancel](#)

Choose the new unit where the members should be moved. Complete the action by clicking on “Move Members to Unit”.



#### 6.4.4 Add Event Statistics

This action opens the data entry dialog for offerings and statistics of the displayed unit:

Add Event Statistics

Congregation \* Arterberry » Caneva » Rieber

Event Date \* 19 . 07 . 2017

Event Type \* Divine Service Sunday

Offering \* USD

Total attendance \* 0

Adults 0

Children 0

Guests 0

Officiant Type for search

Voucher No. \* 106-5608201

Foreign Offering [Add a foreign currency offering](#)

☒ Add another event

Save Event Statistics Cancel

Please refer to [chapter 7.1](#) for detailed information on recording of event data.

#### 6.4.5 Add Member

This action opens the dialog to create a new member for the displayed congregation:

Create new member

Given name \*

Family name \*

Date of Birth \* dd . mm . yyyy ☐ Date of birth confirmed

Unit \* Arterberry » Caneva » Rieber

Gender ☒ male ☐ female

Date Baptism dd . mm . yyyy Minister Congregation

Date Sealing dd . mm . yyyy Minister Congregation

Date Confirmation dd . mm . yyyy Minister Congregation

ID Automatic allocation

Ministry Optionally

☐ Create another Member

Save Member Cancel

Please refer [to chapter 5.2](#) for detailed information on creating a new member.





#### 6.4.6 Add deposit (only on District Level)

This action opens the dialog to add a new deposit for the displayed unit:

Edit Deposit

Depositor \*
Type for search

District \*
Caneva (District) » Rieber » Barrus
X

Deposit Date \*
25 . 07 . 2017

Bank Account \*
Please select

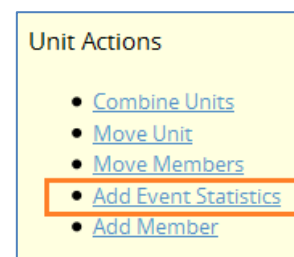
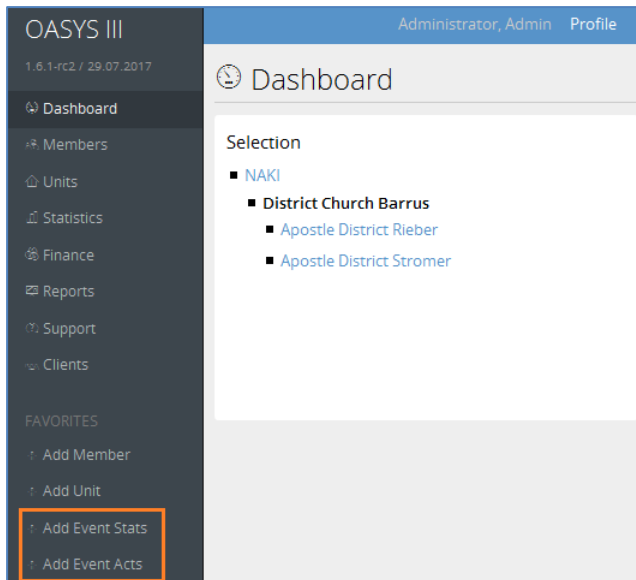
Save Deposit
Cancel

Please refer to [chapter 9.1](#) for detailed information on deposits.

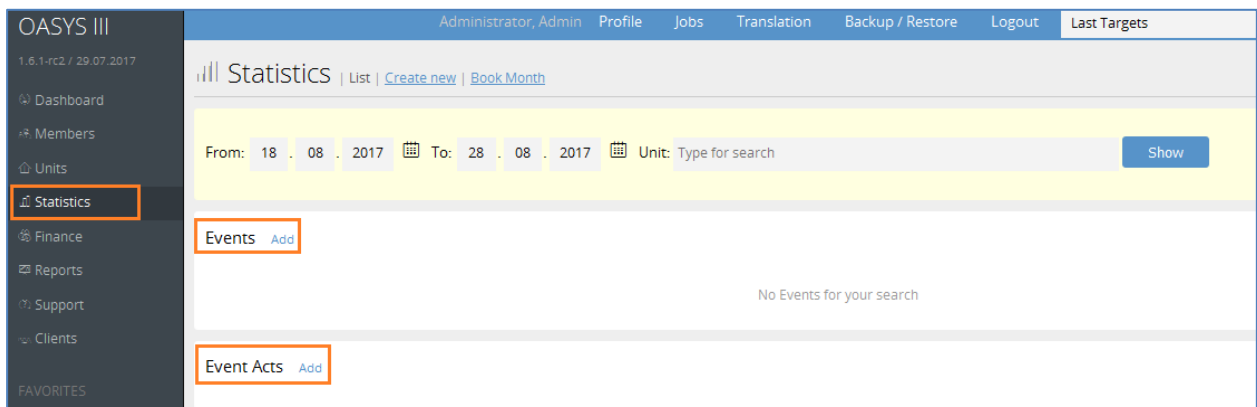


## 7 Recording Event Data

To record event data, click on «Add Event Stats» or «Add Event Acts» in the favorites section of the main menu or in «Unit Actions» in the congregation where the data is entered:



Another option to open the data entry dialog is the «Statistics» module in the main menu:





## 7.1 Add Event Statistics

To enter data for a certain event, click on “Add Event Statistics”. Depending on the client settings (refer to [chapter 4.3.1](#)), you can enter the acts directly in this section or you enter them in a separate dialog (refer to [chapter 7.2](#)).

### 7.1.1 Data entry

Depending on the settings of the OASYS Installation (refer to [chapter 4](#)), you can record the following data:

Add Event Statistics	
Congregation *	<input type="text" value="Type for search"/>
Event Date *	<input type="text" value="20"/> . <input type="text" value="07"/> . <input type="text" value="2017"/>
Event Type *	<input type="text" value="Please select"/>
Offering *	<input type="text"/> USD
Total attendance *	<input type="text" value="0"/>
Adults	<input type="text" value="0"/>
Children	<input type="text" value="0"/>
Guests	<input type="text" value="0"/>
Officiant	<input type="text" value="Type for search"/>
Voucher No. *	<input type="text"/>
Foreign Offering	<a href="#">Add a foreign currency offering</a>
<input checked="" type="checkbox"/> Add another event	
<input type="button" value="Save Event Statistics"/> <a href="#">Cancel</a>	

- ✓ Congregation: the congregation in which the service or activity was held
- ✓ Event Date: the date the service or activity was held
- ✓ Event Type: the type of service/activity (exp. Weekday Devine Service)
- ✓ Offering: the total amount of offering counted in local currency
- ✓ Total Attendance: the total number of persons present for service or for this event (can also be calculated by the system)
- ✓ Adults: the total number of adults present for the service or event
- ✓ Children: the total number of children present for the service or event
- ✓ Guests: the number of persons that are "guests" (those that have not been sealed)



- ✓ Officiant: the minister that conducted the service as specified on the voucher form (the officiant can be searched by the minister's ID or the name)
- ✓ Voucher No: the sequential number pre-printed on the voucher form
- ✓ Foreign offering: for offerings in other currency than the local currency

Once you have entered all the necessary information on the data entry form, click on "Save Event Statistics" to save the current voucher, clear the form and begin entering a new voucher. You may continue to enter vouchers while they are for the same congregation. If you have vouchers for another congregation, make sure to select the correct congregation for the data entry.

Once a voucher has been saved, it is listed in the grid below the entry form.

Note: It is easier to enter the vouchers if they are pre-sorted in numerical order prior to entering them into the system.

For a speedy data entry, it is recommended to work with the keyboard instead of the mouse.

The following control functions have been implemented to help avoid wrong data entry:

- ✓ Event Time Data Entry (warning if event time doesn't correspond to the recorded event time in a congregation)
- ✓ Offering (warn level)
- ✓ Total Attendance (warn level)
- ✓ Guests (warn level)
- ✓ Officiant (officiants which are not active are marked in red)
- ✓ Voucher No. (avoid double entry of the same voucher number; check if voucher number fits the defined voucher range of a congregation)

#### 7.1.1.1 Voided vouchers

In order to control whether all vouchers of a congregation have been sent to the office, it is mandatory for the congregation to send all vouchers, also the ones with typing errors. These vouchers are entered by the data entry staff but have to be voided after entering. Voiding a voucher implicates, that the data of the voided voucher is not taken into account for reporting.

You can void vouchers directly after saving in:

Event History					
Date	Booking State	Total Attending	Guests Attending	Voucher Number	Offering
26.03.2017	open	114	2	000-8737215	158.00 USD
					<input type="button" value="Delete"/> <input type="button" value="Edit"/> <input type="button" value="Void"/>

Another option to void a voucher is to search for it in the "Statistics" module in the main menu:



Statistics   List   <a href="#">Create new</a>   <a href="#">Book Month</a>				
From: 01 . 03 . 2017 To: 31 . 03 . 2017 Unit: Arterberry (Congregation) » Caneva » Rieber <span>X</span> <a href="#">Show</a>				
Events <a href="#">Add</a>				
Date	Unit	Event Type	Voucher No.	Officiant
26.03.2017	<a href="#">Arterberry</a>	Divine Service Sunday	000-8737215	<a href="#">Ekstein, Kyra, (Apostle)</a> <a href="#">Details</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Void</a>
22.03.2017	<a href="#">Arterberry</a>	Divine Service Weekday	000-8737214	<a href="#">Ekstein, Kyra, (Apostle)</a> Foreign Currency <a href="#">Details</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Void</a>

Voided vouchers appear as crossed in the system:

Statistics   List   <a href="#">Create new</a>   <a href="#">Book Month</a>				
From: 01 . 03 . 2017 To: 31 . 03 . 2017 Unit: Arterberry (Congregation) » Caneva » Rieber <span>X</span> <a href="#">Show</a>				
Events <a href="#">Add</a>				
Date	Unit	Event Type	Voucher No.	Officiant
26.03.2017	<a href="#">Arterberry</a>	Divine Service Sunday	000-8737215	<a href="#">Ekstein, Kyra, (Apostle)</a>

## 7.2 Add Event Acts

You can enter Event Acts separately in “Add Event Acts” or directly in “Add Event Stats”, depending on the client settings (refer to [chapter 4.3.1](#)).

To add event acts separately, click on “Add Event Acts” in the favorites section of the main menu:

Add Event Acts

Congregation \* Arterberry (Congregation) » Caneva » Rieber X

Event \* 2017-03-22 (Divine Service Weekday), Ekstein, Kyra, (Apostle) ▼

Event Acts

Confirmation		Numbers
Retired		Numbers
Ordination	2	Numbers
Holy Baptism		Numbers
Holy Sealing	3	Numbers
Holy Sealing <14	12	Numbers

[Save Holy Acts](#)
[Cancel](#)

In the master data, you can decide which event acts should be entered (refer to [chapter 4.3.1.2](#)).



To enter an event act, select the congregation and the event in which the act took place and enter the necessary data.

In the example above, holy sealing (3 adults, 12 children) and ordination took place.

To correct or delete entered data, open “Statistics Module” in the main menu:

Statistics

[List](#)
[Create new](#)
[Book Month](#)

From:

01

.

03

.

2017

To:

28

.

08

.

2017

Unit: Arterberry (Congregation) » Caneva » Rieber

X

Show

Events

Add

Date	Unit	Event Type	Voucher No.	Officiant	
26.03.2017	<a href="#">Arterberry</a>	Divine Service Sunday	000-8737215	<a href="#">Ekstein, Kyra, (Apostle)</a>	<a href="#">Unvoid</a>
22.03.2017	<a href="#">Arterberry</a>	Divine Service Weekday	000-8737214	<a href="#">Ekstein, Kyra, (Apostle)</a>	Foreign Currency <a href="#">Details</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Void</a>

Event Acts

Add

22.03.2017	Divine Service Weekday ( <a href="#">Edit</a>   <a href="#">Delete</a> )	Holy Sealing <14	12
		Holy Sealing	3
		Ordination	2

**Attention:** it is only possible to record event acts up to 12 months in the past from the actual date!



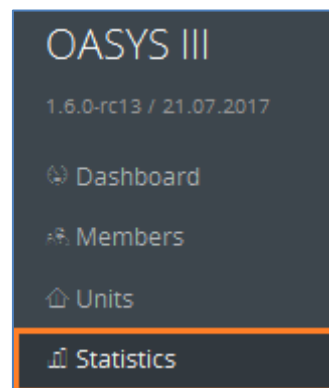
## 8 Statistics Module

### 8.1 Event Overview

In the statistics module, you can list all event vouchers recorded for a specific unit and time range as well as registered event acts.

A special case is the deduction section, this section only shows records, if a District is set as Unit.

To access the statistics overview, click on “Statistics” in the main menu:



**Statistics** | List | [Create new](#) | [Book Month](#)

From: 01 . 01 . 2016 To: 04 . 01 . 2016 Unit: Caneva (District) » Rieber » Barrus x [Show](#)

**Events** [Add](#)

Date	Unit	Event Type	Voucher No.	Officiant	
03.01.2016	<a href="#">Arterberry</a>	Divine Service Sunday	000-5708695	<a href="#">Treichler, Delilah, (Priest)</a>	<a href="#">Details</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Void</a>
03.01.2016	<a href="#">Budziszewski</a>	Divine Service Sunday	000-8738613		<a href="#">Details</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Void</a>
03.01.2016	<a href="#">Grindeland</a>	Divine Service Sunday	000-8737404		<a href="#">Details</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Void</a>
03.01.2016	<a href="#">Aeschlimann</a>	Divine Service Sunday	000-8737509	<a href="#">Alsing, Lacie, (District Elder)</a>	<a href="#">Details</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Void</a>
03.01.2016	<a href="#">Greenwell</a>	Divine Service Sunday	000-8738904	<a href="#">Grissett, Branden, (Priest)</a>	<a href="#">Details</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Void</a>
03.01.2016	<a href="#">Wunderly</a>	Divine Service Sunday	000-5707684	<a href="#">Ekstein, Kyra, (Apostle)</a>	<a href="#">Details</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Void</a>
03.01.2016	<a href="#">Bastille</a>	Divine Service Sunday	000-5708278		<a href="#">Details</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Void</a>

**Event Acts** [Add](#)

Date	Unit	Event Type	Sum	
03.01.2016	Divine Service Sunday	Holy Sealing	2	<a href="#">Edit</a>   <a href="#">Delete</a>
		Ordination	1	

**Deductions**

Date	Unit	Deduction Type	Receipt Number	Sum	
02.01.2016	<a href="#">Arterberry</a>	expense Electricity	1	75.00 USD	<a href="#">Edit</a>   <a href="#">Delete</a>

In this overview, you can edit, delete and void vouchers as well as edit event acts. It is also possible to edit deductions, if you have selected a District.

It is also possible to add new vouchers or event acts directly in this overview. Clicking on “Add” opens the data entry dialog for event statistics or event acts.



## 8.2 Book Month

Once all the data for a month has been entered for all units and the vouchers have been reconciled (refer to [chapter 9.1](#)), a month can be booked.

This action changes the status of the vouchers from “open” to “booked”. Once you have booked a month, you can’t edit the data anymore:

Statistics | List | [Create new](#) | [Book Month](#)

From: 01 . 01 . 2014 To: 31 . 01 . 2015 Unit: Trelew (District) » Stromer » Barrus X [Show](#)

Events [Add](#)

Date	Unit	Event Type	Voucher No.	Officiant	
01.01.2015	<a href="#">Trelew</a>	Divine Service Weekday	000-0000003	<a href="#">Shepperd, Clarence, (Priest)</a>	<a href="#">Details</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Void</a>
25.12.2014	<a href="#">Trelew</a>	Divine Service Sunday	000-0000002	<a href="#">Wolma, Jay, (Priest)</a>	
21.12.2014	<a href="#">Trelew</a>	Divine Service Sunday	000-0000001	<a href="#">Benton, German, (Priest)</a>	

Event History

Date	Booking State	Total Attending	Guests Attending	Voucher Number	Offering	
01.01.2015	open	24	0	000-0000003	325.00 USD	<a href="#">Delete</a>   <a href="#">Edit</a>   <a href="#">Void</a>
25.12.2014	booked	48	2	000-0000002	432.00 USD	
21.12.2014	booked	35	1	000-0000001	500.00 USD	

To book a month, click on “Book Month” and select the month to book:

Statistics | List | [Create new](#) | [Book Month](#)

Book Month

Month to Book: December 2014 ▼

[Book Month](#) [Cancel](#)

**Attention:** this action will book the month for all units of the client!

The system displays all vouchers that will be booked and asks you to confirm the operation:

Confirm book Month 2014-12

«« | « | 1 | 2 | 3 | 4 | » | »»

Events

Event Type	Unit	Date
Divine Service Sunday	<a href="#">Tofolla (Congregation)</a>	07.12.2014
Divine Service Weekday	<a href="#">Tofolla (Congregation)</a>	10.12.2014
Divine Service Sunday	<a href="#">Tofolla (Congregation)</a>	14.12.2014
Divine Service Sunday	<a href="#">Tofolla (Congregation)</a>	28.12.2014
Divine Service Weekday	<a href="#">Tofolla (Congregation)</a>	31.12.2014
Divine Service Weekday	<a href="#">Citino (Congregation)</a>	03.12.2014

«« | « | 1 | 2 | 3 | 4 | » | »»

[Confirm book Month](#) [Cancel](#)





## 9 Finance Module

### 9.1 Reconcile vouchers with a bank deposit

Before a Deposit can be reconciled against vouchers, there must exist at least one Depositor at District Level and a bank account at Local Church level. You may create as many depositors (please refer to [chapter 5.3.6](#) for instructions) and as many bank accounts as required (please refer to [chapter 5.3.11](#) for instructions).

Click on “Finance” in the main menu to access the finance module:

Batch ID	Depositor	Unit	Deposit Date	Deposit Total	Netto Amount	Settled		
1	<a href="#">Pr. Currin, Rick</a>	<a href="#">Caneva (District)</a>	03.03.2016	5,000.00 USD	5,499.00 USD	Yes	<a href="#">Edit</a>	<a href="#">Delete</a>
3	<a href="#">Pr. Currin, Rick</a>	<a href="#">Caneva (District)</a>	20.01.2017	600.00 USD	600.00 USD	Yes	<a href="#">Edit</a>	<a href="#">Delete</a>
5	<a href="#">Pr. Currin, Rick</a>	<a href="#">Caneva (District)</a>	11.07.2017	4,000.00 USD	4,000.00 USD	Yes	<a href="#">Edit</a>	<a href="#">Delete</a>
6	<a href="#">Pr. Currin, Rick</a>	<a href="#">Caneva (District)</a>	02.02.2016	19,095.00 USD	19,095.00 USD	Yes	<a href="#">Edit</a>	<a href="#">Delete</a>
7	<a href="#">Pr. Currin, Rick</a>	<a href="#">Arterberry (Congregation)</a>	02.01.2016	7,500.00 USD	7,500.00 USD	Yes	<a href="#">Edit</a>	<a href="#">Delete</a>

The finance section lists all Deposits. You can decide if you want to display the settled or unsettled deposits:

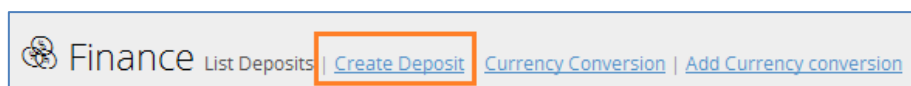
Batch ID	Depositor	Unit	Deposit Date	Deposit Total	Netto Amount	Settled		
9	<a href="#">Pr. Currin, Rick</a>	<a href="#">Caneva (District)</a>	03.03.2016	5,000.00 USD	5,499.00 USD	No	<a href="#">Edit</a>	<a href="#">Delete</a>
4	<a href="#">Pr. Currin, Rick</a>	<a href="#">Caneva (District)</a>	07.03.2016	2,000.00 USD	1,900.00 USD	No	<a href="#">Edit</a>	<a href="#">Delete</a>

You can edit or delete the deposits in this section.

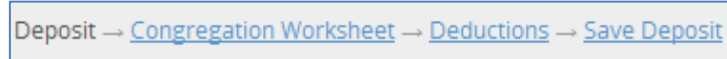
Depending on the client setting, the congregation worksheet is used in the reconciliation process or not (refer to [chapter 4.2.5](#)).

#### 9.1.1 Create deposit with congregation worksheet

Click on the “Create Deposit” command button to begin the Reconciliation Process:



The process diagram with the congregation worksheet looks as follows:





Select a depositor, a district, the deposit date and a bank account and save the deposit to move on in the process:

Edit Deposit

Depositor \* Pr. Currin, Rick Erker

District \* Caneva (District) » Rieber » Barrus

Deposit Date \* 12 . 01 . 2015

Bank Account \* Offerings USD (123456)

Save Deposit Cancel

Please indicate the number of vouchers and attendees (to which the deposit belongs) and the deposited amount:

Congregation Worksheet			
Congregation	Vouchers	Attendees	Amount
Aeschlimann (Congregation)	3	43	8650.00 USD <a href="#">Assign Vouchers</a>
Arterberry (Congregation)	0	0	0.00 USD <a href="#">Assign Vouchers</a>
Bastille (Congregation)	0	0	0.00 USD <a href="#">Assign Vouchers</a>

Select the respective voucher by clicking on “Assign Vouchers” and save the selection:

Add Vouchers for Aeschlimann in Deposit Batch #					
Voucher No.	Congregation	Date	Attendees	Amount	Select
000-5703310	Aeschlimann (Congregation)	04.01.2015	8	2,700.00 USD	<input checked="" type="checkbox"/>
000-5703311	Aeschlimann (Congregation)	07.01.2015	4	1,650.00 USD	<input checked="" type="checkbox"/>
000-5703312	Aeschlimann (Congregation)	11.01.2015	31	4,500.00 USD	<input checked="" type="checkbox"/>
000-5703313	Aeschlimann (Congregation)	18.01.2015	28	5,390.00 USD	<input type="checkbox"/>
000-5703314	Aeschlimann (Congregation)	18.01.2015	52	1,395.00 USD	<input type="checkbox"/>
Summary			43	8850.00 USD	3
<a href="#">Back</a>					<a href="#">Save Vouchers</a>

If the deposited amount equals the total offering amount, the status changes to “Matching”. In this case click on “Save” to save this deposit.

Congregation Worksheet				
Congregation	Vouchers	Attendees	Amount	Status
Aeschlimann (Congregation)	3	43	8850.00 USD <a href="#">Assign Vouchers</a>	Matching
<a href="#">Back</a>				<a href="#">Save</a> <a href="#">Save &amp; Continue</a>

The command button “Save & Continue” will open the deductions section.

The **Deductions Section** allows you to enter any receipts received along with the Vouchers. Such Entries are "Deducted" from the Total Offerings to obtain the "Net Difference" or, Deposit Amount. In this case, the amount deposited and the total offering show a difference, which is indicated in the status:



Congregation Worksheet

Congregation	Vouchers	Attendees	Amount	Status
Aeschlimann (Congregation)	3	43	8650.00 USD <a href="#">Assign Vouchers</a>	Amount
Arterberry (Congregation)	0	0	0.00 USD <a href="#">Assign Vouchers</a>	
Bastille (Congregation)	0	0	0.00 USD <a href="#">Assign Vouchers</a>	
Bressman (Congregation)	0	0	0.00 USD <a href="#">Assign Vouchers</a>	
Summary	3	43	8650.00 USD	

Back Save Save & Continue

Click "Save & Continue" to add deductions:

Add Deductions to Deposit

Type	Account	Amount	Receipt Number	
receipt	5525 Water	50.00 USD	12/2016	<a href="#">Delete</a>
receipt	5520 Electricity	150 USD	12/2016	<a href="#">Add Deductions</a>

Back Continue

Choose the type of deduction, the account, enter the amount and a receipt number, then click on "Add Deductions". When you have entered all deductions concerning this deposit, click on "Continue" to advance to the deposit summary:

Create new Deposit

Total Offerings Collected	8,850.00 USD
LESS: Deductions	200.00 USD
Net Balance to Deposit	8,650.00 USD
Actual Deposited Amount	8,650.00 USD
Difference	0.00 USD

Back Save Deposit Cancel

The final step in the Vouchers Reconciliation process is the **Deposit Summary** section. This Summary represents the following:

1. Total Offerings Collected - the sum of the offering vouchers
2. LESS: Deductions - the sum of the receipts entered in the Deductions Section
3. Net Balance to Deposit - Total Offerings minus the Deductions equals what should have been the Bank Deposit
4. Actual Deposited Amount - this is the amount shown on the Deposit Ticket; entered on the first step of this form
5. Difference - the difference between the Net Balance to Deposit and the Actual Deposited Amount.

**Note:** Any differences cause the Deposit not to balance correctly and such discrepancies must be resolved before a deposit is completely reconciled.

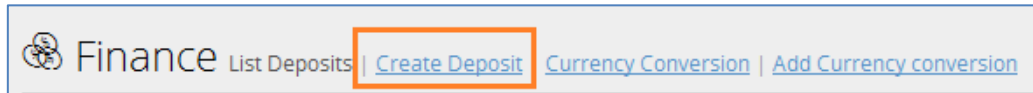


Now save the deposit by clicking on “Save deposit”:

Batch ID	Depositor	Unit	Deposit Date	Deposit Total	Netto Amount	Settled		
10	<a href="#">Pr. Currin Rick</a>	<a href="#">Caneva (District)</a>	13.01.2015	8,650.00 USD	8,650.00 USD	Yes	<a href="#">Edit</a>	<a href="#">Delete</a>

### 9.1.2 Create a deposit without congregation worksheet

Click on the “Create Deposit” command button to begin the Reconciliation Process:



The process diagram with the congregation worksheet looks as follows:

Deposit → [Vouchers](#) → [Deductions](#) → [Save Deposit](#)

Select a depositor, a district, the deposit date, the amount deposited, a bank account, the number of vouchers and attendees that correspond to that specific deposit and click on “Save Deposit” to move on in the process:

Edit Deposit

Depositor \*
De. MEIER, MIKE
Itensis

District \*
Leitz (District) » Vermer » NAKI

Deposit Date \*
2016 - 08 - 01

Deposit Amount \*
100.00
USD

Bank Account \*
Offerings (1478652)

Number of Vouchers \*
1

Total Attendees \*
31

Save Deposit
Cancel

Now select the voucher that applies to the deposit and click on “Save Vouchers” to proceed to the deductions section:

Add Vouchers for Leitz in Deposit Batch #					
Voucher No.	Congregation	Date	Attendees	Amount	Select
000-000001	Itensis (Congregation)	2016-07-25	31	120.00 USD	<input checked="" type="checkbox"/>
000-000002	Itensis (Congregation)	2016-07-28	19	80.00 USD	<input type="checkbox"/>
Summary				120.00 USD	1
<div> Back Save Vouchers </div>					



The **Deductions Section** allows you to enter any receipts received along with the Vouchers. Such Entries are "Deducted" from the Total Offerings to obtain the "Net Difference" or, Deposit Amount:

Add Deductions to Deposit

Type	Account	Amount	Receipt Number	
receipt	5530 Telephone & Communication	5.00 USD	07/2016	<a href="#">Delete</a>
receipt	5401 Youth activities	15 USD	07/2016	<a href="#">Add Deductions</a>

[Back](#) [Continue](#)

Choose the type of deduction, the account, enter the amount and a receipt number, then click on "Add Deductions". When you have entered all deductions concerning this deposit, click on "Continue" to advance to the deposit summary:

Create new Deposit

Total Offerings Collected	120.00 USD
LESS: Deductions	20.00 USD
Net Balance to Deposit	100.00 USD
Actual Deposited Amount	100.00 USD
Difference	0.00 USD

[Back](#) [Save Deposit](#) [Cancel](#)

The final step in the Vouchers Reconciliation process is the **Deposit Summary** section. This Summary represents the following:

1. Total Offerings Collected - the sum of the offering vouchers
2. LESS: Deductions - the sum of the receipts entered in the Deductions Section
3. Net Balance to Deposit - Total Offerings minus the Deductions equals what should have been the Bank Deposit
4. Actual Deposited Amount - this is the amount shown on the Deposit Ticket; entered on the first step of this form
5. Difference - the difference between the Net Balance to Deposit and the Actual Deposited Amount.

**Note:** Any differences cause the Deposit not to balance correctly and such discrepancies must be resolved before a deposit is completely reconciled.

Now save the deposit by clicking on "Save deposit":

Batch ID	Depositor	Unit	Deposit Date	Deposit Total	Netto Amount	Settled	
11	<a href="#">De. MEIER, MIKE</a>	<a href="#">Leitz (District)</a>	2016-08-01	100.00 USD	100.00 USD	<span>Yes</span>	<a href="#">Edit</a> <a href="#">Delete</a>



## 9.2 Currency conversion

In case offerings in foreign currency are recorded in the system, you can add exchange rates for the used currencies. It is mandatory to add a currency conversion if you use the report “Offering with foreign currency” (refer to [chapter 11.5.5](#)).

To open the currency conversion, click on “Finance” in the main menu:

OASYS III  
1.6.1-rc2 / 29.07.2017

Administrator, Admin Profile Jobs Translation Backup / Restore

Finance List Deposits Create Deposit Currency Conversion Add Currency conversion

Depositor All Settled Yes No Show

Batch ID	Depositor	Unit	Deposit Date	Deposit Total
10	Pr. Currin, Rick	Caneva (District)	13.01.2015	48,640.00 USD
17	Pr. Currin, Rick	Caneva (District)	28.07.2017	2,500.00 USD

To add a new conversion, click on “Add Currency conversion”:

Create Currency Conversions

Currency	US-Dollar (USD)	US-Dollar (USD)	x
Foreign Currency	Euro (EUR)	Euro (EUR)	x
Conversion Date	31 . 03 . 2016		
Conversion Rate	0.9		
Save Currency Conversion		Cancel	

Choose the foreign currency for which you want to enter a conversion, enter the date of the conversion and the exchange rate and save it by clicking on “Save Currency Conversion”.

To display the entered conversions, click on “Currency Conversion” and choose a time range and currency (or leave it blank to display all conversions):

Finance List Deposits Create Deposit Currency Conversion Add Currency conversion

Date From 01 . 01 . 2016 Date To 31 . 12 . 2016

Currency From US-Dollar (USD) US-Dollar (USD) x Currency To Type for search Show

Currency	Foreign Currency	Conversion Date	Conversion Rate	
USD	EUR	31.12.2016	0.903000	Edit   Delete
USD	CHF	31.03.2016	1.050000	Edit   Delete
USD	EUR	31.03.2016	0.900000	Edit   Delete
USD	EUR	30.03.2016	1.111000	Edit   Delete
USD	EUR	29.02.2016	1.120000	Edit   Delete
USD	CHF	29.02.2016	1.010000	Edit   Delete
USD	EUR	31.01.2016	1.100000	Edit   Delete
USD	CHF	31.01.2016	1.020000	Edit   Delete



## 10 Support Module

In the support module, you can contact the OASYS III developer to report bugs, errors or suggest new features for the system. The system also creates an exception ticket, if an unexpected problem occurs.

To access the support module, click on “Support”:

Ticket ID	Title	Status
<a href="#">6952</a>	<a href="#">Unknown exception OASYS</a>	new
<a href="#">7007</a>	<a href="#">Unknown exception OASYS</a>	new

In “Tracker” you can switch between the different ticket types:

Ticket ID	Title	Status
<a href="#">6982</a>	<a href="#">Import Attendance figures</a>	new
<a href="#">6983</a>	<a href="#">External access to local installation</a>	new

“Status” indicates the actual status of the ticket.

To contact the support, click on “Report” and submit the form by clicking on “Report”:

Report

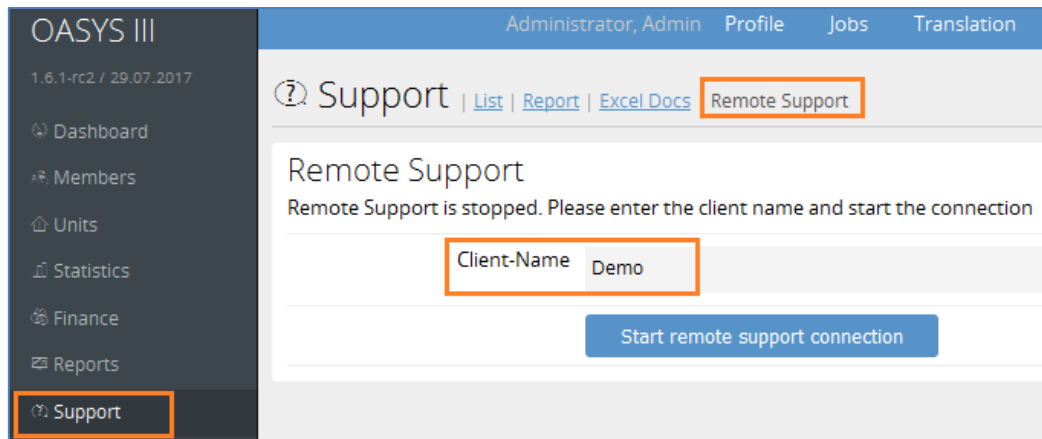
Subject

Description



## 10.1 Remote Support

To facilitate the access to a local installation for maintenance and support purposes of the OASYS III support team, you can establish a VPN connection (Virtual Private Network) if an appropriate Internet connection is available. To establish the remote support, click on “Remote Support” in the “Support” section in the main menu:

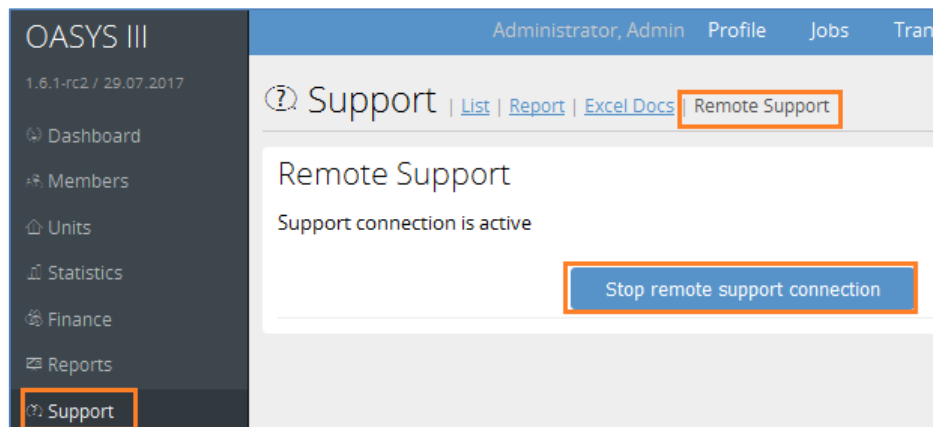


Please enter client name (the name is needed to identify the installation) and start the remote support connection.

If the connection was successful, the following message appears:

**Connection started**

In case the remote support has to be stopped, click on “Stop remote support connection”:



For security reasons, only the OASYS III support team has access to the connected local OASYS III installations.





## 11 Reports

### 11.1 General aspects regarding reports

In the report section, we distinguish between “live” reports and indexed reports.

“Live reports” show data directly in the moment they are entered.

Example of a live report:

Voucher Drilldown by Unit | [Excel Export](#) | [PDF Export](#)

Unit Limited to apostel districts and lower

Arterberry (Congregation) > Caneva > Rieber x ☐ include Voided

Time Range  
From: 01 . 01 . 2017 To: 28 . 08 . 2017

[Show](#) Live Report

“Indexed reports” show the data up to the last indexation of data. Data which is entered after the indexation will not be shown until the next data indexation (please refer to [chapter 4.7.1](#) for further information). The indexation normally takes place in a nightly, automated job if the server is running at night. In case the server is not running at night, you have to start the indexation manually.

Example of a report with indexed data:

Activity Reporting By District | [Excel Export](#) | [PDF Export](#)

Time Range From: 19 . 07 . 2017 To: 26 . 07 . 2017 Unit Type: Apostle District Sub Unit Type: District [Show](#)

Last Indexed 2017-07-26

You can determine which reports will be available in the client (please refer to [chapter 4.6](#)). The access to reports can be limited through the assignment of permissions and/or commissions to the OASYS III users (please refer to [chapter 4.5](#)).

To run a report in, in general you have to select one or several of the following parameters:

- Unit
- Time Range
- Group by

Unit: Rieber (Apostle District) > Barrus > NAKI x

Time Range From: 01 . 01 . 2017 To: 31 . 01 . 2017

Last Indexed

Group by: Apostle District Please select  
Apostle District  
 Bishop District  
 District  
 Sub District  
 Congregation



The group by function in the report enables you to show the data according to the chosen unit level. The available options in the “Group by” list vary according to the unit level specified in “Unit”.

Example for a report with an Apostle District as unit, grouped by “Apostle District”:

Minister Change Report												
Apostle District Rieber, 01.01.2017 - 31.01.2017												
Unit ↑	Active	Ord.	Death	Retired	Ap	Bi	DE	DEv	Sh	Ev	Pr	Dc
Rieber	769	1	0	0	1	1	11	16	30	44	339	327
Total	769	1	0	0	1	1	11	16	30	44	339	327

Example for a report with an Apostle District as unit, grouped by “District”:

Minister Change Report												
Apostle District Rieber, 01.01.2017 - 31.01.2017												
Unit ↑	Active	Ord.	Death	Retired	Bi	DE	DEv	Sh	Ev	Pr	Dc	
Caneva	42	1	0	0	0	1	0	3	3	21	14	
Curren	45	0	0	0	0	0	1	0	3	24	17	
Donath	48	0	0	0	0	1	3	2	4	18	20	
Goswick	34	0	0	0	1	1	1	2	0	13	16	
Guinto	39	0	0	0	0	0	0	1	5	17	16	
Jeska	33	0	0	0	0	0	1	1	0	16	15	
Kroll	20	0	0	0	0	1	0	0	3	9	7	
Lacross	34	0	0	0	0	0	1	1	3	17	12	
Landress	58	0	0	0	0	2	2	2	5	24	23	
Lurey	60	0	0	0	0	0	1	0	2	33	24	
Petrizzo	47	0	0	0	0	0	0	3	4	16	24	
Poissant	99	0	0	0	0	0	1	4	2	43	49	
Schaer	39	0	0	0	0	0	0	1	1	18	19	
Schroeder	34	0	0	0	0	0	2	2	3	14	13	
Slaff	44	0	0	0	0	1	2	4	1	17	19	
Stakem	57	0	0	0	0	4	1	3	1	25	23	
Stram	35	0	0	0	0	0	0	1	4	14	16	
Total	768	1	0	0	1	11	16	30	44	339	327	

For certain reports, additional specific parameters are used.

You can export every report to PDF and Excel for further analysis or distribution:





## 11.2 Member and Minister Reports

### 11.2.1 Member Profile

#### 11.2.1.1 Member Profile Report (all members of a unit)

This report creates the member profile for all members of the selected unit. If you want to create the member profile of a specific member, use the Member PDF export instead (please refer to [chapter 11.2.7.2](#)).

The member profile contains personal data as well as data regarding ministry and assigned commissions.

Member Profiles
[Excel Export](#)
[PDF Export](#)

Unit: Alosta (Congregation) » Slaff » Rieber
X

Show

Live Report

« | « | 1 | 2 | 3 | 4 | 5 | » | »

### Member Profile

Congregation Alosta, 28.08.2017

Buntrock, Kirk

Member Details

<b>Apostle District</b>	Rieber
<b>District</b>	Slaff
<b>Congregation</b>	Alosta
<b>Member ID</b>	13643
<b>Given Name</b>	Kirk
<b>Family Name</b>	Buntrock
<b>Birthday</b>	17.05.1971
<b>Gender</b>	male
<b>Baptism</b>	
<b>Holy Sealing</b>	
<b>Confirmation</b>	
<b>Civil status</b>	married

Member Ministries

Unit	Ministry Type	Start date	End date
Congregation Alosta	Shepherd	19.11.2014	

Member Commissions

No Commissions for Unit



### 11.2.1.2 Member PDF Export (for a specific member)

To open the PDF profile of a specific member, open the member dashboard and click on “PDF Profile” in the “Actions section:

» Buntrock, Kirk Shepherd

<b>Personal Details</b> <a href="#">Edit</a> <table> <tr><td><b>Name</b></td><td>Buntrock, Kirk</td></tr> <tr><td><b>Birthday</b></td><td>17.05.1971</td></tr> <tr><td><b>Gender</b></td><td>male</td></tr> <tr><td><b>ID</b></td><td>13643</td></tr> <tr><td><b>Unit</b></td><td><a href="#">Alosta (Congregation)</a> <a href="#">Change</a></td></tr> </table>	<b>Name</b>	Buntrock, Kirk	<b>Birthday</b>	17.05.1971	<b>Gender</b>	male	<b>ID</b>	13643	<b>Unit</b>	<a href="#">Alosta (Congregation)</a> <a href="#">Change</a>	<b>Contact Details</b> <a href="#">Add</a> <p>Contact details for the member, exp. phone number, email or skype</p>	<b>Member Actions</b> <ul style="list-style-type: none"> <li><a href="#">Delete Member</a></li> <li><a href="#">Change Unit</a></li> <li><a href="#">PDF Profile</a></li> <li><a href="#">History</a></li> </ul>
<b>Name</b>	Buntrock, Kirk											
<b>Birthday</b>	17.05.1971											
<b>Gender</b>	male											
<b>ID</b>	13643											
<b>Unit</b>	<a href="#">Alosta (Congregation)</a> <a href="#">Change</a>											

The member profile report is directly created as PDF:

OASYS III 1.6.1-rc2
Member Profiles
2017-08-28 - 14:03:49

## Member Profile

Buntrock, Kirk

Member Details

Congregation	Alosta
Member ID	13643
Given Name	Kirk
Family Name	Buntrock
Birthday	17.05.1971
Gender	male
Baptism	
Holy Sealing	
Confirmation	
Civil status	married

Member Ministries

Unit	Ministry Type	Start date	End date
Congregation Alosta	Shepherd	19.11.2014	

Member Commissions

No Commissions for Unit



### 11.2.2 Member Report (full)

The member report full lists all members of the selected unit indicating the following information:

- Name
- Sealing date
- Baptism date
- Gender
- Date of birth
- Ministry
- Member ID

Member Report (full) | [Excel Export](#) | [PDF Export](#)

Unit Limited to apostel districts and lower  
**Bressman (Congregation)** » Caneva » Rieber X

Group by Congregation v

Show Live Report

### Member Report (full)

Congregation Bressman, 30.08.2017

**Congregation Bressman**

<a href="#">Name ↑</a>	<a href="#">Sealing</a>	<a href="#">Gender</a>	<a href="#">Birthday</a>	<a href="#">Age</a>	<a href="#">Ministry</a>	<a href="#">Member ID</a>
Baldwin, Faye	1960-09-25	M	1960-08-30	57	Sh	17709
Chisholm, Carolee	1996-06-12	M	1954-05-06	63	Dc	63339
Schehr, Sherman	2008-07-05	M	1972-08-16	45	Dc	17710
<b>3 Members</b>	<b>3 sealed</b>				<b>3 Ministers</b>	

### 11.2.3 Member Report (active, sealings, death)

This report shows the number of members, holy sealing and deceased members for the selected unit and time range:

Member Report (active, sealings, death) | [Excel Export](#) | [PDF Export](#)

Unit: **Caneva (District)** » Rieber » Barrus X Group by District v

Time Range  
From: 01 . 07 . 2003 v To: 31 . 03 . 2017 v Show

Last Indexed 2017-08-30

### Member Report (active, sealings, death)

District Caneva, 01.07.2003 - 31.03.2017, 107 active Members

<a href="#">Unit ↑</a>	<a href="#">Members</a>	<a href="#">Sealings</a>	<a href="#">Death</a>
Caneva	107	4	4



### 11.2.4 District Leaders

The district leaders report provides a list per district/sub district with the responsible leader. It is mandatory to assign the commission "District Leader" to the responsible minister in order to show the information in the report.

District Leaders   <a href="#">Excel Export</a>   <a href="#">PDF Export</a>				
Unit: Rieber (Apostle District) » Barrus » NAKI				
<div> <span>✕</span> Leaders by District Show </div>				
Live Report				
<h3>Leaders Report</h3> <p>Apostle District Rieber, 28.08.2017, by District</p>				
<a href="#">District ↑</a>	<a href="#">District Leader</a>	<a href="#">Congregations</a>	<a href="#">Ministers</a>	<a href="#">Members</a>
Caneva	Alsina Lacie (D)	15	39	109
Curren	Um Theo (D)	15	45	219
Donath	Moyet Lissette (D)	10	48	115
Goswick	Woodhead Rolland (D)	5	34	58
Guinto		4	39	90
Jeska		6	33	125



### 11.2.5 Minister Report (full)

The minister report full provides a list of all active ministers of the selected unit, indicating the following data:

- Working area
- Age
- Name
- Ministry
- Date of birth
- Member ID

Minister Report (full) <a href="#">Excel Export</a> <a href="#">PDF Export</a>				
Unit: Aeschlimann (Congregation) » Caneva » Rieber				
Control Break by Congregation <input type="button" value="Show"/>				
Live Report				
Minister Report (full)				
Congregation Aeschlimann, 29.08.2017, 4 Ministries				
Congregation Aeschlimann				
Name ↑	Birthday	Age	Ministry	Member ID
Alvarado, Isa	07.12.1962	54	Sh	13428
Odmark, Carlota	04.08.1969	48	Dc	17778
Tollin, Lynne	11.05.1954	63	Dc	63338
Walkington, Kayce	09.09.1968	49	Pr	17789

The report shows the data recorded in the database at the time of running the report (live data).

In the excel report, the report indicates the working area for each minister (marked in blue) and the parent unit of the working area (where applicable):

Minister Report (full)							
District Church Barrus, 20.09.2017							
Name	Birthday	Age	Ministry	Member ID	Apostle District	District	Congregation
Ekstein, Kyra	1956-09-27	61	Ap	31905	Rieber		
Worlow, Walter	1972-07-12	45	Ev	17777	Rieber	Caneva	
Yenor, Carmina	1976-10-07	40	Pr	19232	Rieber	Lurey	Touchette
Zant, Graig	1962-10-07	54	Dc	12953	Rieber	Landress	Schoenhard



### 11.2.6 Minister Change Report

The minister change report provides information about changes among the ministers for the specified period and the selected unit.

It lists:

- Number of active ministers
- Number of ordained ministers
- Number of deceased ministers
- Number of retired ministers
- Number of ministers per ministry

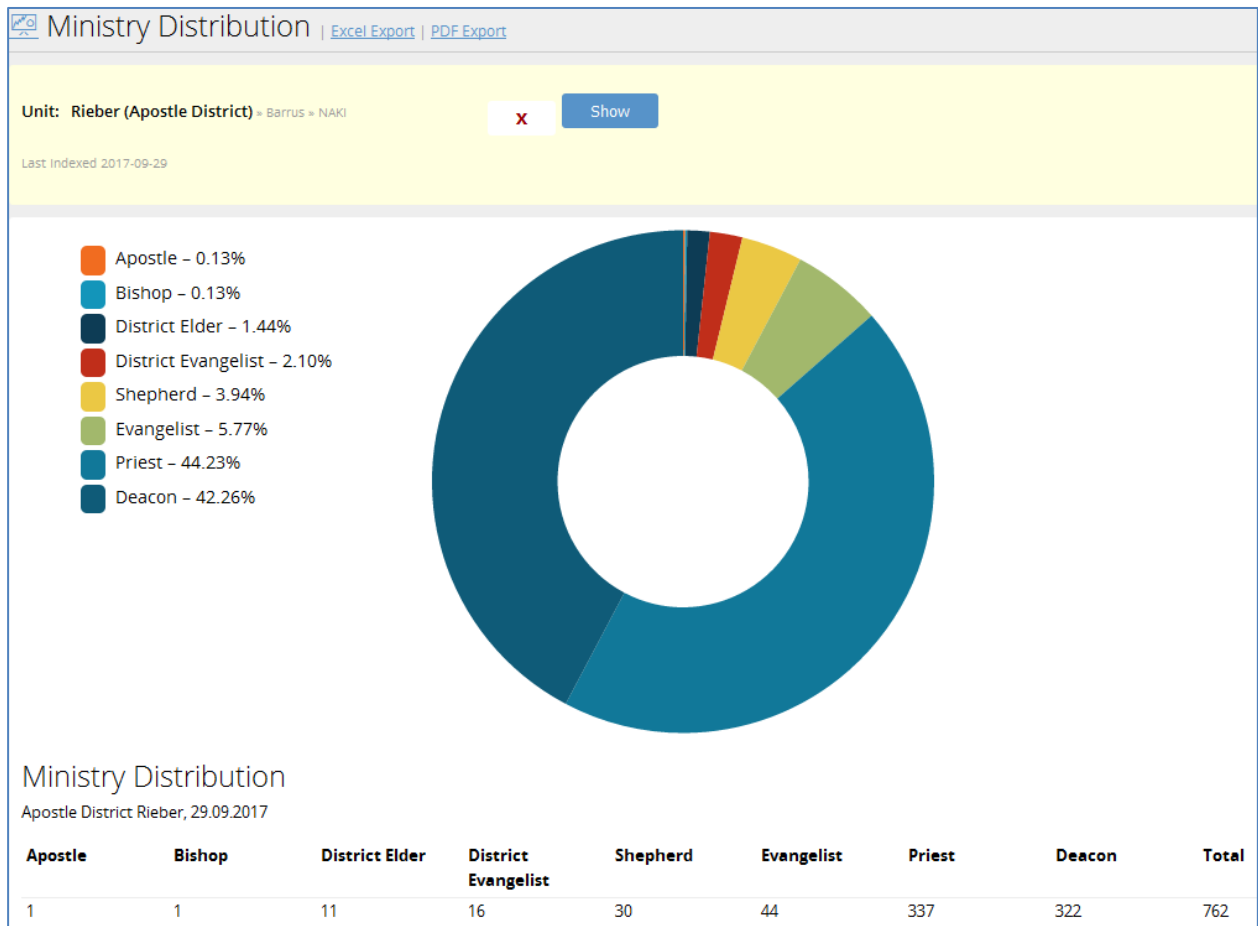
Minister Change Report   <a href="#">Excel Export</a>   <a href="#">PDF Export</a>									
Unit: Caneva (District) » Rieber » Barrus									
Group by: Congregation									
Time Range From: 01 . 01 . 2017 To: 30 . 06 . 2017 Show									
Last Indexed									
Minister Change Report									
District Caneva, 01.01.2017 - 30.06.2017									
Unit	Active	Ord.	Death	Retired	DE	Sh	Ev	Pr	Dc
Aeschlimann	4	1	0	0	0	1	0	1	2
Arterberry	6	1	0	1	0	0	1	2	3
Bastille	4	0	0	0	0	0	0	3	1
Bressman	3	0	0	0	0	1	0	0	2
Budziszewski	1	0	0	0	0	0	0	1	0
Erker	1	0	0	0	0	0	0	1	0
Greenwell	5	0	0	0	0	0	0	4	1
Grindeland	4	0	0	0	0	0	1	2	1
Konruff	4	0	0	0	0	1	0	2	1
Seelye	1	0	0	0	0	0	0	0	1
Victorine	3	0	0	0	1	0	0	1	1
Vlchek	2	0	0	0	0	0	0	1	1
Wellnitz	0	0	0	1	0	0	0	0	0
Wunderly	1	0	0	0	0	0	0	1	0
Total	39	2	0	2	1	3	2	19	14





### 11.2.7 Minister Distribution Report

The minister distribution provides a graphic to visualize the distribution according to the ministry for the selected unit (working area). The report also contains a table with the number of active ministers per ministry in the selected unit.



The report reflects the data recorded in the database at the time of running the report (live report).



### 11.2.8 Minister List Report

The minister list provides information about changes in the ministerial status of the ministers for the selected unit and period:

- Ordained
- Retired
- Removed
- Resigned
- Leave of absence

The example shows the ordained priests in the selected period for the unit “Barrus”:

Reports <a href="#">Excel Export</a> <a href="#">PDF Export</a>															
Unit: Barrus (District Church) » NAKI				<input checked="" type="checkbox"/>	From: 01 . 07 . 2016	📅	To: 31 . 12 . 2016	📅	Ministerial Status						
Ministry type: Priest				Show		Ordination									
Live Report															
Minister List															
District Church Barrus, 01.07.2016 - 31.12.2016, 3 Ministries															
Unit	Sub Unit	Congregation	Name	Ministry	Birthday	State Date	State	State	ID						
Rieber	Lurey	Touchette	Lapidus, Eldridge	Priest	1979-03-03	2016-07-08	ordination	Ekstein, Kyra	47825						
Rieber	Schaer	Ramgel	Wearly, Lan	Priest	1975-07-19	2016-08-13	ordination	Ekstein, Kyra	12984						
Rieber	Caneva	Wellnitz	Worlow, Walter	Priest	1972-07-12	2016-10-01	ordination		17777						

The report provides the following information:

- Working area (including parent units)
- Name
- Ministry
- Birthdate
- Event date
- Officiant
- Member ID



### 11.2.9 Future Retirements

This report provides information to the church management regarding the ministers to be retired in the future.

The report lists all active ministers, which will turn 65 years in the selected time range.

The example report shows all ministers to be retired in the year 2018 in the selected district:

Future Retirements | [Excel Export](#) | [PDF Export](#)

Unit: **Curren (District)** » Rieber » Barrus Control Break by: District

Date From: 01 . 01 . 2018 Date To: 31 . 12 . 2018 Show

Live Report

---

Future Retirements  
District Curren, 01.01.2018 - 31.12.2018

District Curren

**Congregation Angier**

Name	Ministry	Birthday	Age	Sealing	Member ID
Um, Theo	District Evangelist	1953-12-23	63		12423
Winney, Brandie	Deacon	1953-06-11	64		12479

You can also use this report to verify that all ministers older than 65 have been retired or the information on the retirement has been entered correctly by stretching the “Date from” to a date far in the past:

Future Retirements | [Excel Export](#) | [PDF Export](#)

Unit: **Curren (District)** » Rieber » Barrus Control Break by: District

Date From: 01 . 01 . 1920 Date To: 31 . 12 . 2018 Show

Live Report

---

Future Retirements  
District Curren, 01.01.1920 - 31.12.2018

District Curren

**Congregation Angier**

Name	Ministry	Birthday	Age	Sealing	Member ID
Um, Theo	District Evangelist	1953-12-23	63		12423
Winney, Brandie	Deacon	1953-06-11	64		12479

**Congregation Corban**

Name	Ministry	Birthday	Age	Sealing	Member ID
Kafton, Val	Deacon	1945-01-17	72		12516

**Congregation Rapa**

Name	Ministry	Birthday	Age	Sealing	Member ID
Matro, Sherrell	Deacon	1949-07-02	68		12506

The example shows two ministers, which already have passed 65 years, but are still listed as active ministers. These ministers might still be active or their retirement hasn't been entered in the system.



### 11.2.10 Deceased Members Full

This report provides a detailed list of all the deceased members for the selected unit and period:

Deceased Members Report (full) | [Excel Export](#) | [PDF Export](#)

Unit Limited to apostel districts and lower  
**Rieber (Apostle District)** » Barrus » NAKI

x Time Range From: 01 . 01 . 2016 To: 31 . 12 . 2016 Show

Live Report

### Deceased Members Report (full)

Apostle District Rieber, 31.12.2016

**Congregation Angier**

<a href="#">Name ↑</a>	<a href="#">Ministry</a>	<a href="#">Age</a>	<a href="#">Birthday</a>	<a href="#">Date decease</a>	<a href="#">Member ID</a>
Morrón, Lida		87	10.04.1929	16.04.2016	49305

**Congregation Ector**

<a href="#">Name ↑</a>	<a href="#">Ministry</a>	<a href="#">Age</a>	<a href="#">Birthday</a>	<a href="#">Date decease</a>	<a href="#">Member ID</a>
Paden, Romelia	Dc	91	15.06.1925	05.09.2016	12350

### 11.2.11 Deceased Members Grouped

This report shows the number of deceased member for the selected period and unit:

Deceased Members Grouped | [Excel Export](#) | [PDF Export](#)

Unit: **Rieber (Apostle District)** » Barrus » NAKI

x Group by District

Time Range  
From: 01 . 01 . 2016 To: 31 . 12 . 2016 Show

Last Indexed 2017-09-19

### Deceased Members Grouped

Apostle District Rieber, 01.01.2016 - 31.12.2016, 2 deceased Members

Apostle District Rieber

<a href="#">Unit ↑</a>	<a href="#">Deceased</a>
Curren	1
Poissant	1
Total	2



## 11.3 User Reports

### 11.3.1 User List

The report provides a list of all OASYS III users' currently registered (whole OASYS III installation):

User List	
<a href="#">Excel Export</a>   <a href="#">PDF Export</a>	
<a href="#">Show</a>	
Live Report	
User List	
Member	E-Mail
<a href="#">Administrator, Admin</a>	admin@oasys.network
<a href="#">Gotshall, Peter</a>	test@oasys.network

### 11.3.2 User Access History

The report provides a log of the access times and actions performed by the selected user account in the specified period:

[Excel Export](#)

[PDF Export](#)

Account:

Time Range From:

01

.

06

.

2017

To:

30

.

06

.

2017

Show

Live Report

««

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«

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1

|

2

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3

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4

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7

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»»

User Access History

Member	Access Time	Action
admin@oasys.network	26.06.2017 14:09	<a href="#">Edited a Unit</a>
admin@oasys.network	26.06.2017 14:09	<a href="#">Visited Unit Details</a>
admin@oasys.network	26.06.2017 14:09	<a href="#">Visited edit Unit Form</a>
admin@oasys.network	26.06.2017 14:09	<a href="#">Visited edit Unit Form</a>
admin@oasys.network	26.06.2017 14:09	<a href="#">Visited Unit Details</a>
admin@oasys.network	26.06.2017 14:08	<a href="#">Updated Member Informations</a>
admin@oasys.network	26.06.2017 14:08	<a href="#">Visited Member Details</a>
admin@oasys.network	26.06.2017 14:08	<a href="#">Opened edit Member Form</a>
admin@oasys.network	26.06.2017 14:08	<a href="#">Visited Member Details</a>
admin@oasys.network	26.06.2017 14:08	<a href="#">Viewed Member List</a>



### 11.3.3 User Performance List

The performance list report shows the number of vouchers entered per day per user for the selected unit in the indicated period. The performance labels are set by the system administrator in the client settings (please refer to [chapter 4.2.6](#)).

User Performance <a href="#">Excel Export</a> <a href="#">PDF Export</a>			
Unit: Barrus (District Church) » NAKI			
Time Range From: 01 . 07 . 2017 To: 31 . 07 . 2017 <a href="#">Show</a>			
Last Indexed 2017-08-17			
User Performance			
District Church Barrus, 01.07.2017 - 31.07.2017			
Member	Date	Vouchers	Performance
Gotshall, Peter	03.07.2017	1,335	Excellent
	10.07.2017	1,023	Excellent
	11.07.2017	1,452	Excellent
	12.07.2017	1,083	Excellent
	13.07.2017	858	Excellent
	14.07.2017	1,016	Excellent
	17.07.2017	1,604	Excellent
	18.07.2017	1,048	Excellent
	19.07.2017	800	Excellent
	20.07.2017	1,217	Excellent
	21.07.2017	415	Needs Improvement
	24.07.2017	318	No Performance
	26.07.2017	556	Fair
	27.07.2017	218	No Performance
	28.07.2017	963	Excellent
	31.07.2017	1,574	Excellent
	Total	15,480	



## 11.4 Unit Reports

### 11.4.1 Congregation Profile

The congregation profile provides a summary of the recorded data of a congregation:

- General information
- Property information
- Event time information
- Commissions
- Voucher Ranges

Congregation Profiles | [Excel Export](#) | [PDF Export](#)

Unit: Arterberry (Congregation) » Caneva » Rieber
✕
Show

Live Report

### Congregation Profile

Congregation Arterberry, 29.08.2017

Congregation Arterberry

#### Unit Details

<b>Unit ID</b>	1232
<b>Unit Name</b>	Congregation Arterberry
<b>Opening date</b>	01.06.2002
<b>Date closed</b>	

#### Property Details

<b>Property Type</b>	Own Building
<b>Address</b>	Churchstreet 1 Arterberry  United States

#### Event Time Details

<b>Divine Service Sunday</b>	Sunday	09:00
<b>Divine Service Weekday</b>	Wednesday	18:00

#### Voucher Ranges

Range From	Range To	Full
106-5608201	106-5608300	no

#### Commissions

Commission	Name	Contact Type	Contact Details
Congregation Rector	Gotshall, Charmaine	Private Mobilephone	+1 234 5678
		E-Mail	gotshall@yahoo.com
Data Entry	Bergeman, Rudolf		
Offering/Attendance			

If you run the report on a higher unit level than a congregation, the report provides the profile for every congregation in the selected unit:



### 11.4.2 District List

The district list provides the following information for the selected unit:

- Number of congregations (in case a congregation is chosen or “group by” is set on congregation level, the number is always 1)
- Break down of the number of members in age groups:  
children, youth, adults, seniors  
(the system administrator can set the age groups in the client settings, please refer to [chapter 4.2.3](#))
- Number of members
- Number of active ministers

District List   <a href="#">Excel Export</a>   <a href="#">PDF Export</a>							
Unit: Stromer (Apostle District) » Barrus » NAKI							
Last Indexed 2017-08-29							
District List							
Apostle District Stromer, 31.07.2017, 374 active Members in grouped Units							
Unit ↑	Congregations	Children	Youth	Adults	Seniors	Members	Ministers
Secunda	12	54	35	55	2	146	38
Tannahill	7	58	29	53	13	153	42
Vire	11	12	12	42	8	75	43
Total	30	124	76	0	23	374	123

### 11.4.3 Unit Verification List

The unit verification list provides a list to compare sub districts and higher unit levels regarding:

- Number of congregations
- Number of members
- Number of ministers
- Minister / Member ratio

Unit Verification List   <a href="#">Excel Export</a>   <a href="#">PDF Export</a>				
Unit: Stromer (Apostle District) » Barrus » NAKI				
Live Report				
Unit Verification List				
Apostle District Stromer, 29.08.2017				
Unit ↑	Congregations	Ministers	Members	AVG
District Secunda	12	38	146	0
District Tannahill	7	42	153	0
District Vire	11	43	75	0
Total	30	123	374	0





## 11.5 Analysis / Control Reports regarding Attendance / Offering

### 11.5.1 Activity Reporting (drill down)

#### 11.5.1.1 Activity Reporting by District

The Activity Reporting by District report allows you to drill down in the displayed data unto the entered event voucher per unit.

The report displays data for the whole client. The Unit Type and Sub Unit type selection determines how you can drill down in the data.

If you choose for example Unit Type = Apostle District and as Sub Unit Type = Congregation, the drilldown will skip the unit levels in between.

To drill down, you have to click on a unit (blue link) until it reaches the desired level. The export of the report reflects exactly the unfolded structure of the drilldown.

The report provides the following data per unit in the selected period:

- Attendance  
(total attendance including guests)
- Guests
- Offering
- Number of entered vouchers
- Drilldown to the actual vouchers

Activity Reporting By District   <a href="#">Excel Export</a>   <a href="#">PDF Export</a>					
Time Range From: 01 . 01 . 2016 To: 31 . 01 . 2016 Unit Type Apostle District Sub Unit Type District Show Last Indexed 2017-08-29					
Activity Reporting 01.01.2016 - 31.01.2016, by District					
Description	Attendance	Guests	Offering	Vouchers	
<a href="#">Rieber</a>	38,829	1,882	5,381,044.00 USD	1,253	<a href="#">Drilldown</a>
- <a href="#">Caneva</a>	2,468	155	154,890.00 USD	92	<a href="#">Drilldown</a>
-- Aeschlimann	381	28	22,095.00 USD	8	<a href="#">Drilldown</a>
-- Arterberry	133	16	6,245.00 USD	7	<a href="#">Drilldown</a>
-- Bastille	87	10	4,620.00 USD	8	<a href="#">Drilldown</a>
-- Bressman	115	3	7,380.00 USD	5	<a href="#">Drilldown</a>
-- Budziszewski	112	2	7,070.00 USD	8	<a href="#">Drilldown</a>
-- Chatley	67	2	2,930.00 USD	7	<a href="#">Drilldown</a>
-- Erker	270	4	31,345.00 USD	6	<a href="#">Drilldown</a>
-- Greenwell	78	6	2,135.00 USD	7	<a href="#">Drilldown</a>
-- Grindeland	92	17	5,870.00 USD	6	<a href="#">Drilldown</a>
-- Konruff	411	55	29,300.00 USD	7	<a href="#">Drilldown</a>
-- Seelye	339	3	7,270.00 USD	7	<a href="#">Drilldown</a>
-- Vichek	96	1	3,470.00 USD	5	<a href="#">Drilldown</a>
-- Wellnitz	53	2	7,340.00 USD	3	<a href="#">Drilldown</a>
-- Wunderly	234	6	17,820.00 USD	8	<a href="#">Drilldown</a>
- <a href="#">Curren</a>	2,068	102	196,480.00 USD	96	<a href="#">Drilldown</a>
- <a href="#">Donath</a>	3,524	60	458,520.00 USD	84	<a href="#">Drilldown</a>
- <a href="#">Goswick</a>	3,154	22	667,790.00 USD	43	<a href="#">Drilldown</a>

A click on “Drilldown” will open the “Voucher Drilldown by Unit” report of the selected unit (please refer to [chapter 11.5.8.1](#)) and you can further drill down to the entered voucher details.



### 11.5.1.2 Activity Reporting by Ministry

The Activity Reporting by Ministry report allows you to drill down in the displayed data unto the entered event voucher per minister. The report displays data for the whole client.

To drill down, you have to click on a minister level (blue link) until you reach the desired minister. The export of the report reflects exactly the unfolded structure of the drilldown.

The report provides the following data per minister in the selected period:

- Attendance (total attendance including guests)
- Guests
- Offering
- Number of entered vouchers
- Drilldown to the actual vouchers

Activity Reporting   <a href="#">Excel Export</a>   <a href="#">PDF Export</a>					
Time Range From: 01 . 01 . 2016 To: 31 . 01 . 2017 <a href="#">Show</a>					
Last Indexed 2017-08-29					
Activity Reporting					
01.01.2016 - 31.01.2017, by Ministry					
Description	Ministry	Attendance	Guests	Offering	Vouchers
<a href="#">Chief Apostle</a>		0	0	0.00 USD	0
<a href="#">District Apostle</a>		0	0	0.00 USD	0
<a href="#">Apostle</a>		7,184	104	1,128,665.00 USD	32
<a href="#">Bishop</a>		0	0	0.00 USD	0
<a href="#">District Elder</a>		3,516	245	628,565.00 USD	58
- <a href="#">Alsina, Lacie</a>	District Elder	821	39	64,490.00 USD	12
-- Aeschlimann		240	17	11,610.00 USD	3
-- Erker		284	5	30,340.00 USD	6
-- Konruff		200	15	17,340.00 USD	1
-- Seelye		69	1	1,600.00 USD	1
-- Wunderly		28	1	3,600.00 USD	1
- <a href="#">Lemings, Levi</a>	District Elder	654	7	174,670.00 USD	11
- <a href="#">McGavock, Harrison</a>	District Elder	1,370	179	216,390.00 USD	20
- <a href="#">Montell, Yael</a>	District Elder	75	5	34,650.00 USD	2
- <a href="#">Polster, Deana</a>	District Elder	596	15	138,365.00 USD	13
<a href="#">District Evangelist</a>		5,241	288	904,655.00 USD	106

A click on “Drilldown” will open the “Voucher Drilldown by Officiant” report of the selected minister (please refer to [chapter 11.5.8.2](#)) and you can further drill down to the entered voucher details.



### 11.5.2 Activity Report (attendance, guests, offerings, vouchers)

The Activity Report provides the following data for the selected unit and period:

- Unit
- Attendance (total attendance including guests)
- Guests
- Offering
- Number of entered vouchers
- Total row for the selected unit

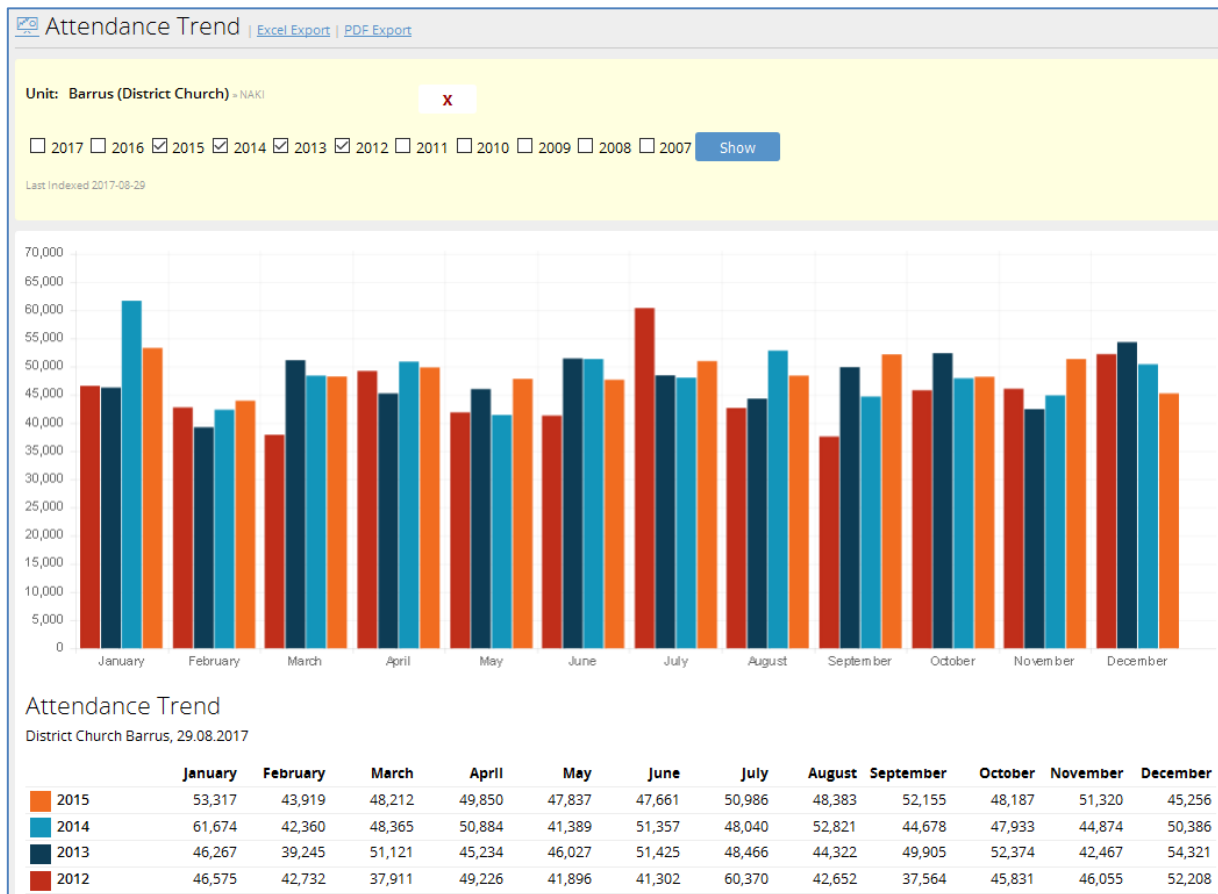
Activity Report (attendance, guests, offerings, vouchers)   <a href="#">Excel Export</a>   <a href="#">PDF Export</a>				
Unit: <b>Vire (District)</b> - Stomer - Barrus <span style="float: right;">X Group by Congregation</span>				
Time Range From: 01 . 01 . 2016 To: 31 . 01 . 2016 <span>Show</span>				
Last Indexed 2017-08-29				
Activity Report (attendance, guests, offerings, vouchers)				
District Vire, 01.01.2016 - 31.01.2016, 632,790.00 USD total Offerings				
Unit ↑	Attendance	Guests	Offerings	Vouchers
Conces	249	6	35,380.00 USD	8
Guerette	711	5	89,605.00 USD	8
Klocek	262	1	62,290.00 USD	8
Kyzar	574	0	80,570.00 USD	8
Raymos	1,292	33	157,845.00 USD	10
Taker	178	0	52,940.00 USD	8
Wickson	342	3	120,280.00 USD	11
Zanders	514	10	33,880.00 USD	8
Subtotal	4,122	58	632,790.00 USD	69
Total	4,122	58	632,790.00 USD	69



### 11.5.3 Attendance Trend Report

The attendance trend report provides a graphic that allows to compare the development of attendance per month over the selected years.

The report also contains a table with the total attendance figures per month and year.



Eye-catching outliers in this graphic, comparing a month over the years, may be an indicator for a wrong data entry.

**Example January 2014:** to detect if there is a data entry error, you can use the Activity Reporting by Unit to verify if there has been a wrong data entry:

Activity Reporting By District | [Excel Export](#) | [PDF Export](#)

Time Range From: 01.01.2014 To: 31.01.2014 Unit Type: District Sub Unit Type: Congregation [Show](#)

Last Indexed 2017-08-31

Activity Reporting  
01.01.2014 - 31.01.2014, by District

Description	Attendance	Guests	Offering	Vouchers	
<a href="#">Caneva</a>	3,068	144	316,070.00 USD	99	<a href="#">Drilldown</a>
<a href="#">Curren</a>	15,875	122	267,520.00 USD	126	<a href="#">Drilldown</a>
- <a href="#">Angier</a>	165	15	27,570.00 USD	10	<a href="#">Drilldown</a>
- <a href="#">Blackford</a>	242	12	25,705.00 USD	9	<a href="#">Drilldown</a>
- <a href="#">Brownie</a>	14,017	7	9,400.00 USD	10	<a href="#">Drilldown</a>
- <a href="#">Conchas</a>	175	21	33,610.00 USD	10	<a href="#">Drilldown</a>
- <a href="#">Corban</a>	133	0	24,040.00 USD	9	<a href="#">Drilldown</a>
- <a href="#">Geeding</a>	68	6	4,705.00 USD	8	<a href="#">Drilldown</a>
- <a href="#">Haggstrom</a>	369	11	50,990.00 USD	10	<a href="#">Drilldown</a>



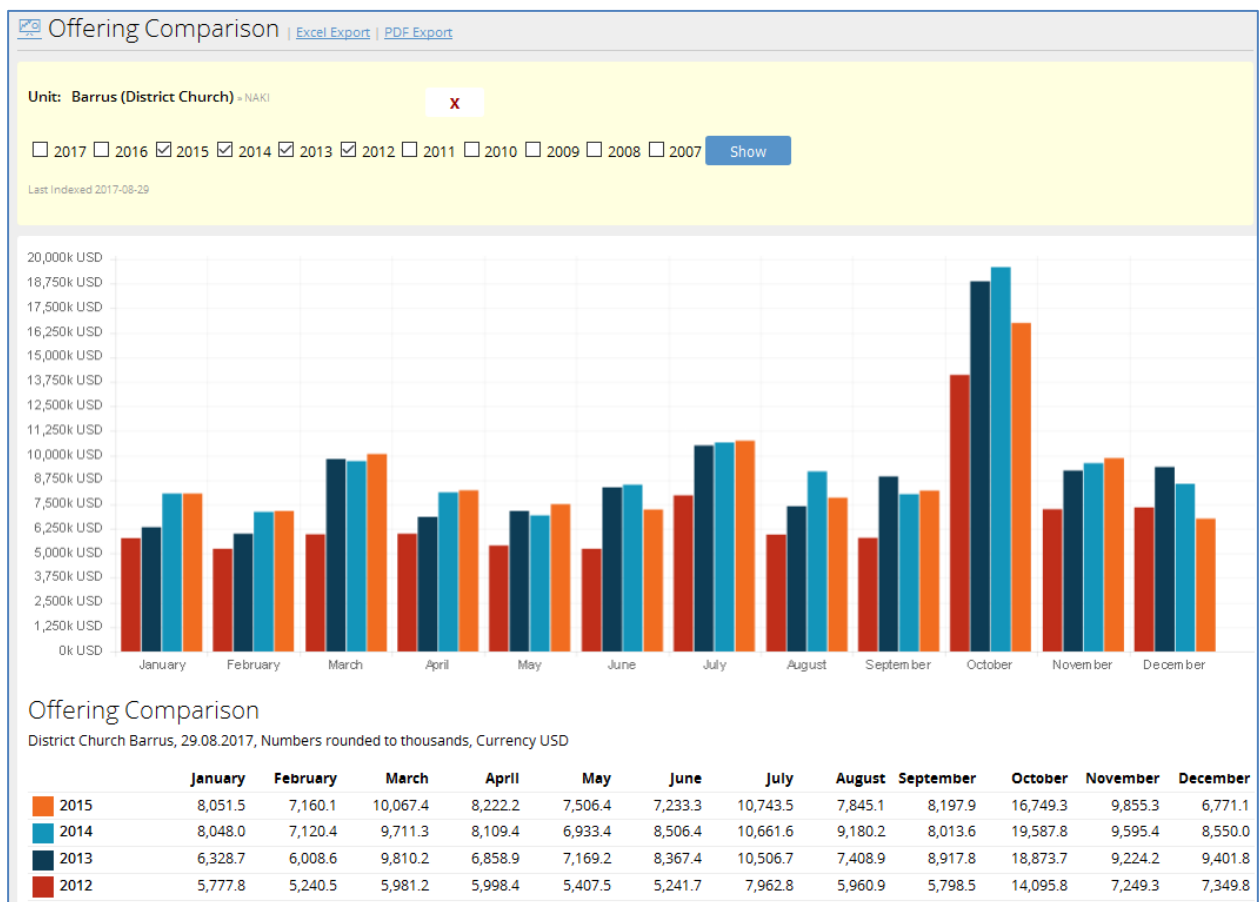
Clicking on “Drilldown” allows identifying the voucher with the wrong entry:

Parent Unit	Congregation	Date	Acc. I	Gsts.	Offering	OPM	Officiant	Foreign Currency	Control No.	Reconciled?
Curren	Brownie	15.01.2014	13,830	0	1,500.00 USD	0.11	Lijewski, Gearldine		000-5279305	no
Curren	Brownie	01.01.2014	36	4	1,950.00 USD	54.17	Lijewski, Gearldine		000-5309999	no
Curren	Brownie	26.01.2014	31	0	180.00 USD	5.81	Lijewski, Gearldine		000-5279307	no
Curren	Brownie	05.01.2014	27	2	1,100.00 USD	40.74	Lijewski, Gearldine		000-5310000	no
Curren	Brownie	29.01.2014	27	0	490.00 USD	18.15	Lijewski, Gearldine		000-5279308	no
Curren	Brownie	15.01.2014	20	1	660.00 USD	33.00	Lijewski, Gearldine		000-5279304	no
Curren	Brownie	22.01.2014	18	0	350.00 USD	19.44	Lijewski, Gearldine		000-5279306	no
Curren	Brownie	08.01.2014	12	0	850.00 USD	70.83	Lijewski, Gearldine		000-5279302	no
Curren	Brownie	12.01.2014	11	0	1,870.00 USD	170.00	Lijewski, Gearldine		000-5279303	no
Curren	Brownie	05.01.2014	5	0	450.00 USD	90.00			000-5279301	no
10 Vouchers			14,017	7	9,400.00 USD	0.67				

### 11.5.4 Offering Comparison Report

The offering comparison report provides a graphic that allows comparing the development of the offering per month over the selected years.

The report also contains a table with the offering figures per month and year for the selected unit. The report only shows the offering in the local currency, offering in foreign currency is not included.





### 11.5.5 Offering with Foreign Currency

The offerings with foreign currency provide the offering amounts in local currency as well as in foreign currency. The foreign currencies are converted to the local currency according to the conversion rates recorded in the system.

You can display the report with the offering in all foreign currencies or you can select a specific foreign currency.

Offerings with foreign Currencies | [Excel Export](#) | [PDF Export](#)

Unit: **Barrus (District Church)** » NAKI ✕ Group by: **Apostle District** ▼

Time Range From: 01 . 02 . 2016 📅 To: 29 . 02 . 2016 📅

Foreign Currency: **All** ▼

**Show** Last Indexed 2017-08-29

**Offerings with foreign Currencies**  
District Church Barrus, 01.02.2016 - 29.02.2016, All Currencies

Unit	USD	CHF	» USD	EUR	» USD	Total
Rieber	5,284,641.5	80	80.8	100	112	5,284,834.3
Stromer	709,175	0	0	0	0	709,175
<b>Total</b>	<b>5,993,816.5</b>	<b>80</b>	<b>80.8</b>	<b>100</b>	<b>112</b>	<b>5,994,009.3</b>

The report converts the offering according to the recorded conversion rate at the date specified in the report. If no conversion rate is recorded, the foreign currency is not converted to the local currency and the “Total” column will only reflect the offering amount in local currency without the foreign currency. Please refer to [chapter 9.2](#) for further information regarding currency conversion.

In the above example, the report shows figures from February 2016 and the amounts are converted at the recorded end of the month rate per 2016/02/29:

**Finance** | [List Deposits](#) | [Create Deposit](#) | [Currency Conversion](#) | [Add Currency conversion](#)

Date From: 01 . 01 . 2016 📅 Date To: 31 . 03 . 2016 📅

Currency From: **US-Dollar (USD)** US-Dollar (USD) ✕ Currency To: **Type for search**

**Show**

Currency	Foreign Currency	Conversion Date	Conversion Rate	
USD	CHF	31.03.2016	1.050000	<a href="#">Edit</a>   <a href="#">Delete</a>
USD	EUR	31.03.2016	0.900000	<a href="#">Edit</a>   <a href="#">Delete</a>
USD	EUR	30.03.2016	1.111000	<a href="#">Edit</a>   <a href="#">Delete</a>
USD	EUR	29.02.2016	1.120000	<a href="#">Edit</a>   <a href="#">Delete</a>
USD	CHF	29.02.2016	1.010000	<a href="#">Edit</a>   <a href="#">Delete</a>
USD	EUR	31.01.2016	1.100000	<a href="#">Edit</a>   <a href="#">Delete</a>
USD	CHF	31.01.2016	1.020000	<a href="#">Edit</a>   <a href="#">Delete</a>

**Note:** if various conversion rates have been registered for the selected period, the system converts the foreign currency at the average conversion rate for the selected period.



### 11.5.6 Voided Vouchers Report

In this report, you can display the voided vouchers for the selected unit and time period:

**Voided Vouchers**
[Excel Export](#) | [PDF Export](#)

**Unit** Limited to apostel districts and lower

**Arterberry (Congregation)** » Caneva » Rieber ✖

**Time Range**

From: 01 . 01 . 2016 To: 30 . 06 . 2016

[Show](#) Live Report

### Voided Vouchers

Congregation Arterberry, 01.01.2016 - 30.06.2016

<u>Vou. Date</u>	<u>Voucher No.</u>	<u>Congregation</u>	<u>Offering</u>	<u>Att.</u>	<u>Gsts.</u>	<u>Officiant</u>	<u>#ID</u>
21.02.2016	000-8737208	Arterberry	350.00 USD	19	3	Gotshall, Peter	Open
21.02.2016	000-8737208	Arterberry	350.00 USD	19	3	Gotshall, Peter	Open



### 11.5.7 Voucher Control Log Report

In case voucher ranges have been defined per congregation, this report provides information on missing voucher numbers, complete ranges or if no vouchers for the specified range have been entered in the selected period.

**Note:** the report is only usable for analysis in clients where voucher ranges are registered per congregation. If no ranges are defined, you should deactivate the report for the user in the report management.

**Missing vouchers:** shows the voucher numbers which the congregation has not submitted

Voucher Control Log

[Excel Export](#)
[PDF Export](#)

Unit: **Caneva (District)** » Rieber » Barrus X

☒ Missing Numbers
 ☐ No range defined
 ☒ Complete ranges
 ☐ No Vouchers in Period

Time Range From: 01 . 01 . 2015 📅 To: 31 . 12 . 2015 📅 Show

Live Report

Voucher Control Log  
District Caneva, 01.01.2015 - 31.12.2015

Unit <span style="font-size: 0.8em;">↑</span>	Range	State	Missing Numbers
Arterberry	000-5708601 - 000-5708700	Missing Numbers	000-5708689
			000-5708682
			000-5708674 - 000-5708675
			000-5708664
			000-5708651 - 000-5708658
			000-5708638
			000-5708630 - 000-5708633
			000-5708624
			000-5708607 - 000-5708608

**Complete ranges:** shows the congregations which have completed the registered voucher booklet and may need a new one

Voucher Control Log

[Excel Export](#)
[PDF Export](#)

Unit: **Caneva (District)** » Rieber » Barrus X

☐ Missing Numbers
 ☐ No range defined
 ☒ Complete ranges
 ☐ No Vouchers in Period

Time Range From: 01 . 01 . 2015 📅 To: 31 . 12 . 2015 📅 Show

Live Report

Voucher Control Log  
District Caneva, 01.01.2015 - 31.12.2015

Unit <span style="font-size: 0.8em;">↑</span>	Range	State	Missing Numbers
Greenwell	000-8738900 - 000-8739000	Complete	





**No range defined:** shows all congregations where no voucher range has been defined yet

**Voucher Control Log**
[Excel Export](#)
[PDF Export](#)

Unit: **Caneva (District)** » Rieber » Barrus

X

☐ Missing Numbers
☒ No range defined
☐ Complete ranges
☐ No Vouchers in Period

Time Range From: 01 . 01 . 2015
To: 31 . 12 . 2015

Show

Live Report

**Voucher Control Log**  
District Caneva, 01.01.2015 - 31.12.2015

<a href="#">Unit ↑</a>	Range	State	<a href="#">Missing Numbers</a>
Bastille	No range defined		
Bressman	No range defined		
Budziszewski	No range defined		

**No vouchers in Period:** shows the congregations which have not sent in vouchers of the specified voucher range

**Voucher Control Log**
[Excel Export](#)
[PDF Export](#)

Unit: **Caneva (District)** » Rieber » Barrus

X

☐ Missing Numbers
☐ No range defined
☐ Complete ranges
☒ No Vouchers in Period

Time Range From: 01 . 01 . 2017
To: 31 . 03 . 2017

Show

Live Report

**Voucher Control Log**  
District Caneva, 01.01.2017 - 31.03.2017

<a href="#">Unit ↑</a>	Range	State	<a href="#">Missing Numbers</a>
Aeschlimann		No Vouchers found	



## 11.5.8 Voucher Drilldown Reports

### 11.5.8.1 Voucher Drilldown by Unit Report

This report displays all entered vouchers for the selected unit and period and allows you to drilldown unto the entered voucher details. You can only run the report up to the level of Apostle District.

You can decide if the voided vouchers should be included in the report. Voided vouchers appear crossed.

The report shows the following information:

- Unit and its parent unit
- Event date
- Number of total attendance (including guests)
- Number of guests
- Offering amount in local currency
- Offering per Attendee (OPA)
- Officiant
- A flag if a foreign currency has been entered
- Voucher control number
- Reconciliation information

Voucher Drilldown by Unit   <a href="#">Excel Export</a>   <a href="#">PDF Export</a>										
Unit Limited to apostel districts and lower Arterberry (Congregation) » Caneva » Rieber <span style="color: red;">x</span> <input checked="" type="checkbox"/> Include Voided										
Time Range From: 01 . 02 . 2016 To: 29 . 02 . 2016										
<a href="#">Show</a> Live Report										
Voucher Drilldown by Unit Congregation Arterberry, 01.02.2016 - 29.02.2016										
Parent Unit	Congregation	Date	Att.	Gsts.	Offering	OPM	Officiant	Foreign Currency	Control No.	Reconciled?
Caneva	Arterberry	03.02.2016	12	1	180.00 USD	15.00	Treichler, Delliha	yes	000-8737203	no
Caneva	Arterberry	07.02.2016	27	9	1,870.00 USD	69.26	Beyers, Lurlene		000-8737204	no
Caneva	Arterberry	10.02.2016	11	0	270.00 USD	24.55	Alsina, Lacie		000-8737205	no
Caneva	Arterberry	15.02.2016	23	4	2,040.00 USD	88.70	Wisebey, Jacquetta		000-8737206	no
Caneva	Arterberry	18.02.2016	16	1	600.00 USD	37.50	Gotshall, Peter		000-8737207	no
Caneva	Arterberry	21.02.2016	49	3	350.00 USD	18.42			000-8737208	no
5 Vouchers			89	15	4,960.00 USD	55.73				

**Note:** voided vouchers are not included in the total row. Voided vouchers can be included to verify that all vouchers have been sent in and no number has been skipped.



### 11.5.8.2 Voucher Drilldown by Officiant Report

This report displays all entered vouchers for the selected minister and period and allows you to drilldown unto the entered voucher details. You can decide if the voided vouchers should be included in the report. Voided vouchers appear crossed.

The report shows the following information:

- Unit and its parent unit
- Event date
- Number of total attendance (including guests)
- Number of guests
- Offering amount in local currency
- Offering per Attendee (OPA)
- Officiant
- A flag if a foreign currency has been entered
- Voucher control number
- Reconciliation information

Voucher Drilldown by Officiant <a href="#">Excel Export</a> <a href="#">PDF Export</a>									
Officiant: <b>Ev. Gotshall, Peter</b> <small>Arterberry</small> <span style="float: right;">X <input checked="" type="checkbox"/> Include Voided</span> Time Range From: 01 . 02 . 2016 <span style="font-size: small;">📅</span> To: 29 . 02 . 2016 <span style="font-size: small;">📅</span> <span>Show</span> <span style="font-size: x-small;">Live Report</span>									
Voucher Drilldown by Officiant Gotshall, Peter, 01.02.2016 - 29.02.2016									
Parent Unit	Congregation	Date	Att.	Gsts.	Offering	OPM	Officiant	Foreign Currency	Control No. Reconciled?
Caneva	Arterberry	18.02.2016	16	1	600.00 USD	37.50	Gotshall, Peter		<a href="#">000-8737207</a> no
Caneva	Arterberry	21.02.2016	19	3	350.00 USD	18.42	Gotshall, Peter		<a href="#">000-8737208</a> no
Caneva	Arterberry	21.02.2016	19	3	355.00 USD	18.68	Gotshall, Peter		<a href="#">000-8737216</a> no
Caneva	Bressman	14.02.2016	29	2	840.00 USD	28.97	Gotshall, Peter		<a href="#">000-8732405</a> no
3 Vouchers			64	6	1,795.00 USD	28.05			

**Note:** voided vouchers are not included in the total row. Voided vouchers can be included to verify that all vouchers have been sent in and no number has been skipped.



### 11.5.8.3 Voucher Drilldown by Number Report

This report displays all entered vouchers for the selected number range and period and allows you to drilldown unto the entered voucher details. The voucher number range is limited to 1000 numbers.

You can decide if the voided vouchers should be included in the report. Voided vouchers appear crossed.

The report shows the following information:

- Voucher control number
- Event date
- Number of total attendance (including guests)
- Number of guests
- Offering amount in local currency
- Offering per Attendee (OPA)
- Officiant
- A flag if a foreign currency has been entered
- Reconciliation information
- Voucher control number

Voucher by Number

Excel Export

PDF Export

Voucher Number From: 000-8739001

To: 000-8739030

☒ Include Voided

Show

Live Report

Voucher by Number

000-8739001 - 000-8739030

Control No.	Date	Att.	Gsts.	Offering	OPM	Officiant	Foreign Currency	Reconciled?	Parent Unit	Congregation 1
<a href="#">000-8739001</a>	09.12.2015	19	0	1,260.00 USD	66.32			no	Goswick	Gallogly
<a href="#">000-8739002</a>	13.12.2015	33	1	3,410.00 USD	103.33			no	Goswick	Gallogly
<a href="#">000-8739003</a>	16.12.2015	23	0	7,350.00 USD	319.57			no	Goswick	Gallogly
<a href="#">000-8739004</a>	20.12.2015	28	0	5,460.00 USD	195.00			no	Goswick	Gallogly
<a href="#">000-8739005</a>	27.12.2015	39	1	7,140.00 USD	183.08			no	Goswick	Gallogly
<a href="#">000-8739006</a>	31.12.2015	29	1	6,630.00 USD	228.62			no	Goswick	Gallogly
<a href="#">000-8739007</a>	03.01.2016	34	2	7,290.00 USD	214.41	Byous, Erin		no	Goswick	Gallogly
<a href="#">000-8739008</a>	06.01.2016	24	0	1,760.00 USD	73.33			no	Goswick	Gallogly
<a href="#">000-8739009</a>	10.01.2016	15	0	3,510.00 USD	234.00			no	Goswick	Gallogly
<a href="#">000-8739010</a>	13.01.2016	26	1	2,200.00 USD	84.62			no	Goswick	Gallogly
<a href="#">000-8739011</a>	20.01.2016	17	1	2,200.00 USD	129.41			no	Goswick	Gallogly
<a href="#">000-8739012</a>	24.01.2016	21	1	5,400.00 USD	257.14	Byous, Erin		no	Goswick	Gallogly
<a href="#">000-8739013</a>	27.01.2016	15	1	650.00 USD	43.33			no	Goswick	Gallogly
<a href="#">000-8739014</a>	31.01.2016	25	1	6,000.00 USD	240.00			no	Goswick	Gallogly
<a href="#">000-8739015</a>	03.02.2016	19	1	6,290.00 USD	331.05			no	Goswick	Gallogly
<a href="#">000-8739016</a>	07.02.2016	28	2	2,900.00 USD	103.57	Byous, Erin		no	Goswick	Gallogly
<a href="#">000-8739017</a>	14.02.2016	31	1	4,860.00 USD	156.77	Musson, Anibal		no	Goswick	Gallogly
<a href="#">000-8739018</a>	17.02.2016	20	1	3,380.00 USD	169.00			no	Goswick	Gallogly
<a href="#">000-8739019</a>	24.02.2016	20	0	500.00 USD	25.00			no	Goswick	Gallogly
19 Vouchers		466	15	78,190.00 USD	167.79					

**Note:** voided vouchers are not included in the total row. Voided vouchers can be included to verify that all vouchers have been sent in and no number has been skipped.



### 11.5.9 Voucher Entry Verification Log

This report allows you to control the data entry on congregational level.

The report displays the number of entered vouchers per month in the selected period (maximum range is a year), indicating the last data entry date.

This allows you to identify congregations which haven't sent in all vouchers or have a complete month missing (missing period).

You can only run the report up to the level of Apostle District.

Voucher Entry Verification Log | [Excel Export](#) | [PDF Export](#)

Unit: Limited to apostle districts and lower  
Rieber (Apostle District) » Barrus » NAKI

Time Range  
From: 01.01.2015 To: 31.12.2015

☒ Only congregations with missing periods ☐ Open congregations only [Show](#)

Last indexed 2017-08-29

Voucher Entry Verification Log  
Apostle District Rieber, 01.01.2015 - 31.12.2015, only Congregations with missing Periods

District Caneva

Congregation	Year	January	February	March	April	May	June	July	August	September	October	November	December
Arterberry	2015	7 16.03.2015	7 06.04.2015	8 20.05.2015	5 18.09.2015	4 23.07.2015	6 17.09.2015	6 09.09.2015	None	5 24.11.2015	9 24.12.2015	6 19.01.2016	7 05.02.2016
Bastille	2015	8 16.03.2015	5 06.04.2015	5 20.05.2015	7 18.09.2015	None	None	6 09.09.2015	7 16.10.2015	6 24.12.2015	7 24.12.2015	7 19.01.2016	9 05.02.2016
Budziszewski	2015	6 16.03.2015	7 06.04.2015	None	6 18.09.2015	7 23.07.2015	6 17.09.2015	7 16.10.2015	8 16.10.2015	7 24.11.2015	7 24.12.2015	8 19.01.2016	None
Chatley	2015	7 07.04.2015	3 06.04.2015	None	5 18.09.2015	4 23.07.2015	None	6 09.09.2015	6 16.10.2015	7 24.11.2015	6 24.12.2015	7 19.01.2016	6 05.02.2016
Greenwell	2015	6 07.04.2015	5 06.04.2015	None	5 18.09.2015	4 23.07.2015	None	7 09.09.2015	5 16.10.2015	6 24.11.2015	5 24.12.2015	7 19.01.2016	8 05.02.2016
Grindeland	2015	5 16.03.2015	8 06.04.2015	5 20.05.2015	6 18.09.2015	None	3 17.09.2015	2 09.09.2015	2 16.10.2015	2 24.11.2015	4 24.12.2015	3 19.01.2016	4 05.02.2016
Seelye	2015	None	9 20.05.2015	9 20.05.2015	10 18.09.2015	11 23.07.2015	9 17.09.2015	11 24.11.2015	7 16.10.2015	12 24.11.2015	7 24.12.2015	9 19.01.2016	8 05.02.2016
Victorine	2015	5 16.03.2015	8 06.04.2015	5 20.05.2015	8 18.09.2015	None	7 17.09.2015	5 09.09.2015	None	None	None	8 19.01.2016	9 05.02.2016

If you only want to show the congregations with missing periods, we recommend to limit the report to "Open congregations only", since a closed congregation will have missing periods from the closing date onwards.

**Note:** the date specified in the report indicates the date of the last voucher data entry per unit/month



## 11.5.10 Yearly Report

You can use this report to verify, how many congregations are active in each month in the selected year. The report has been designed by the District Church DRC West.

The report displays the following information:

- **N. S/U:** Number of sub units (this number changes according to the “Sub Unit Type” selected in the report parameter)
- **N.T.C.1:** number of congregations according to the Apostle (has to be filled in in the Excel Export)
- **N.T.C.2:** number of congregations registered in OASYS
- **For each month:** number of congregations which have sent in at least one voucher in this month
- **N.T.C.A:** number of active congregations in the selected year
- **N.C.I:** number of inactive congregations in the selected year
- **Ø C.A.:** average of active congregations in the selected year
- **Ø C.I.:** average of inactive congregations in the selected year
- **Responsible:** responsible district leader (district leader commission has to be assigned)

[Excel Export](#)

[PDF Export](#)

Unit: **Barrus (District Church)** » NAKI

X

Group by

Apostle District

▼

Sub Unit Type

District

▼

Year

2015

▼

Show

Last Indexed 2017-08-29

Legend

No.	Number in Report	
N. S/U	Number of Sub Units	
N.T.C.1 (Apostle)	Number of Apostles Congregations (filled in by Apostle manually)	
N.T.C.2 (OASYS)	Number of Congregations in OASYS active at the beginning of the Report Period	
N.T.C.A.	Number of active congregations in reported Time Range	
N.C.I.	Number of inactive congregations in reported Time Range	Number of Congregations - Number of active Congregations
Ø C.A.	Average of active congregations in reported Time Range	Number of active Congregations divided by 12
% C.A.	Percent of active congregations in reported Time Range	Number of yearly reporting Congregations / Number of congregations / 100

Yearly Report

District Church Barrus, 2015

No.	Apostle District	N. S/U	N.T.C.1 (Apostle)	N.T.C.2 (OASYS)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	N.T.C.A.	N.C.I.	Ø C.A.	% C.A.	Responsible
1	Rieber	17		188	165	164	159	169	166	167	170	133	170	171	171	164	177	11	164.08	94.15%	
2	Stromer	4		37	28	28	29	27	28	28	29	28	28	28	28	27	31	6	28.00	83.78%	



### 11.5.11 Yearly Report Five Dates

The report contains the same information as the “Yearly Report” (please refer to [chapter 11.5.10](#)), but instead of comparing the months of the selected year, you can compare up to five different dates.

For example, thanks giving services over the last 5 years or departed services during a year.

Reports
Excel Export
PDF Export

Unit: Rieber (Apostle District) - Barrus - NAKI
Group by: District
Sub Unit Type: District

Date 1: 01 . 03 . 2015
Date 2: 05 . 07 . 2015
Date 3: 01 . 11 . 2015
Date 4: dd . mm . yyyy
Date 5: dd . mm . yyyy
Show

Last Indexed: 2017-08-29

Legend

No.	Number in Report
N. S/U	Number of Sub Units
N.T.C.1 (Apostle)	Number of Apostles Congregations (filled in by Apostle manually)
N.T.C.2 (OASYS)	Number of Congregations in OASYS active at the beginning of the Report Period
N.T.C.A.	Number of active congregations in reported Time Range
N.C.I.	Number of inactive congregations in reported Time Range
Ø C.A.	Average of active congregations in reported Time Range
% C.A.	Percent of active congregations in reported Time Range

Yearly Report

Apostle District Rieber, 2015-03-01, 2015-07-05, 2015-11-01

No.	District	N. S/U	N.T.C.2	2015-03-01	2015-07-05	2015-11-01	N.T.C.A.	N.C.I.	Ø C.A.	% C.A.	Responsible
1	Caneva	1	16	10	14	14	15	1	3.17	93.75%	Ev. Worlow, Walter
2	Curren	1	16	13	15	14	15	1	3.50	93.75%	
3	Donath	1	10	10	10	10	10	0	2.50	100.00%	
4	Goswick	1	5	5	5	5	5	0	1.25	100.00%	
5	Guinto	1	4	3	4	4	4	0	0.92	100.00%	
6	Jeska	1	7	6	6	5	6	1	1.42	85.71%	



## 11.6 Reports regarding events

### 11.6.1 Event Acts Full

This report provides a list of the members, which have received a holy act (sealing, baptism, confirmation)

The report shows the following information:

- Event type
- Event date
- Name
- Birthdate
- Gender
- Member ID

Event Acts Full

Excel Export

PDF Export

Unit: Rieber (Apostle District) » Barrus » NAKI

X

Blessing Type

Holy Sealing

Time Range

From: 01 . 01 . 2016  To: 31 . 12 . 2016 

Show

Live Report

Event Acts Full

Apostle District Rieber, 01.01.2016 - 31.12.2016, Sealings

District Caneva

Congregation Greenwell

Event Type	Event Date	Name ↑	Birthday	Gender	Member ID
Holy Sealing	06.07.2016	Acosto, Althea	03.11.2008	female	77127
Holy Sealing	06.07.2016	Dague, Taneka	25.04.2007	male	77126
Holy Sealing	19.05.2016	Grissett, Branden	02.03.1969	male	17765
Holy Sealing	02.03.2016	Mondale, Shanelle	20.11.1970	male	17762

### 11.6.2 Event Acts Short

This report provides a list of the number of members, which have received a holy act (sealing, baptism, confirmation) in the selected unit and period.

Event Acts Short

[Excel Export](#) | [PDF Export](#)

Unit: Rieber (Apostle District) » Barrus » NAKI

x

Group By: District

Blessing Type: Holy Sealing

Time Range

From: 01 . 01 . 2016  To: 31 . 12 . 2016 

Show

Last Indexed 2017-08-29

Apostle District Rieber

Event Acts Short

Apostle District Rieber, 01.01.2016 - 31.12.2016, Sealings

[Unit](#) ↑

Sealed

Caneva

4





## 11.7 Forms

### 11.7.1 Deposit Reconciliation Worksheet

This report provides a form, which has to be filled in manually. It is used in the internal office process in the District Church DRC West.

Deposit Reconciliation Worksheet | [PDF Export](#)

Unit: **Stram (District)** » Rieber » Barrus

X
Show

Live Report

DC Barrus

District / Subdistrict: Stram
Period: \_\_\_\_\_

Congregation	Voucher Count	Total Attendance	Total Offerings
1. Debellis			
2. Depa			
3. Engnath			
4. Marando			
5. Pitner			
6. Rado			
7. Renell			
<b>Totals</b>			

Bank Name:

Account No.:

Total Deposited:

Date Deposited:

Depositor's signature: \_\_\_\_\_



## 12 Support

Contact persons for OASYS III support are Jens Gassmann (developer) and Carmen Loppacher (NACI).

For a fast handling of your support request, please use the following email:

✉ **support@oasys.network**

If needed, you can contact Jens Gassmann or NACI directly:

Jens Gassmann:  +49 (0) 2271/ 462009  
 jens.gassmann

Carmen Loppacher:  +41 43 299 41 00  
 carmenswitzerland

Jens Gassmann is mainly responsible for:

- Updates of server software
- Updates of application software
- Correction of errors in the application software (errors are managed via NACI)
- Support for installation and operation of the local server installation
- Support for OASYS I imports and excel imports
- Technical user support via Email and chat and if needed via remote desktop tool (TeamViewer) (content related support lays in the responsibility of NACI)
- Further development of the application software as defined by NACI

Carmen Loppacher is mainly responsible for:

- User support in English and French
- Error management: verification of errors detected by users: verifying that the error is reproducible in the affected installation and in other installations and if it's still persistent in the latest version of the application software; management of errors in the ticketing system
- Change request management: ensure that change requests from user side are necessary and don't have any negative impact on running installations
- Definition of further development of the application with the developer and local users
- Testing of error corrections and new features/reports (ensure a stable system before the running installations are updated to the newest version)
- Support of local teams for implementation of the application OASYS III (process definitions, correct configuration of the installation)
- User formation according to the needs (system administration, data entry, analysis and verification of data, ...)
- Release planning in coordination with Jens Gassmann



## 13 Appendix

### 13.1 Examples of data Entry Forms

#### Example Offering & Attendance Voucher Local Church DRC West:

<h2 style="margin: 0;">New Apostolic Church</h2> <h3 style="margin: 0;">Attendance &amp; Offering Voucher</h3>	
<b>Date:</b> (DD—MM—YYYY) <input style="width: 90%;" type="text"/>	<b>Congregation:</b> <input style="width: 90%;" type="text"/>
	<b>District:</b> <input style="width: 90%;" type="text"/>
<b>Offering Total:</b> <input style="width: 80%;" type="text"/>	
<b>OFFERING TOTAL IN WORDS</b> _____ _____ _____	
<b>ATTENDANCE</b> _____	
<b>Total Attendance:</b> <input style="width: 80%;" type="text"/>	<b>Guests:</b> <input style="width: 80%;" type="text"/>
<b>Officiant ID:</b> <input style="width: 80%;" type="text"/>	_____ Signature
<b>WITNESSES</b> _____	
I have counted the offering & attendance and certify that this report is correct and honest.	
<b>Witness ID:</b> <input style="width: 80%;" type="text"/>	_____ Signature
<b>Witness ID:</b> <input style="width: 80%;" type="text"/>	_____ Signature
<b>Witness ID:</b> <input style="width: 80%;" type="text"/>	_____ Signature
<b>Control No: 999-1234567</b>	



**Example Offering & Attendance Voucher Local Church Zambia:**

<h2 style="margin: 0;">New Apostolic Church</h2> <p style="margin: 0; font-size: small;">(Zambia, Malawi &amp; Zimbabwe)                  Plot 8145/8146 Kasiba Road, Maluba, P.O. Box 31761, Lusaka                  Tel: +260 211 252139 / 252785, Fax: +260 211 252145 / +260 977 790858                  E-mail: info@naczam.org.zm</p>					
<div style="background-color: #333; color: white; padding: 2px 10px; border-radius: 5px; display: inline-block;"><b>Divine Service Slip</b></div>					
<h3 style="margin: 0;">001-149 0211948</h3>					
Congregation : .....					
Elder District : .....					
Date : .....					
<b>Type of Service:</b> (Please tick) <input checked="" type="checkbox"/>					
<input type="checkbox"/> <small>Sunday</small>	<input type="checkbox"/> <small>Mid-week</small>				
<input type="checkbox"/> <small>Wedding</small>	<input type="checkbox"/> <small>Funeral</small>				
<input type="checkbox"/> <small>Other (specify) .....</small>					
<b>Offering:</b>	<div style="border: 1px solid black; padding: 5px; display: inline-block; font-size: 24px; font-weight: bold;">K</div> <div style="border: 1px solid black; width: 40px; height: 30px; display: inline-block; margin-left: 10px;"></div>				
OFFERING TOTAL IN WORDS: ..... ..... .....					
<b>ATTENDANCE:</b>					
<div style="border: 1px solid black; width: 40px; height: 25px; display: inline-block;"></div> <small>ADULTS</small>	<div style="border: 1px solid black; width: 40px; height: 25px; display: inline-block;"></div> <small>CHILDREN</small>				
<div style="border: 1px solid black; width: 40px; height: 25px; display: inline-block;"></div> <small>GUESTS</small>	<div style="border: 1px solid black; width: 40px; height: 25px; display: inline-block;"></div> <small>TOTAL</small>				
<b>OFFICIANT NRC No.:</b> <div style="border: 1px solid black; width: 150px; height: 25px; display: inline-block; margin-left: 10px;"></div>					
<b>Name:</b> .....	<b>Signature:</b> .....				
<table style="width: 100%;"> <tr> <td style="width: 50%;"> <b>Prepared by:</b> .....  <div style="text-align: center; font-size: small;">(Name)</div> </td> <td style="width: 50%;"> <b>Signature</b> .....                 </td> </tr> <tr> <td> <b>Witnessed by:</b> .....  <div style="text-align: center; font-size: small;">(Name)</div> </td> <td> <b>Signature</b> .....                 </td> </tr> </table>		<b>Prepared by:</b> ..... <div style="text-align: center; font-size: small;">(Name)</div>	<b>Signature</b> .....	<b>Witnessed by:</b> ..... <div style="text-align: center; font-size: small;">(Name)</div>	<b>Signature</b> .....
<b>Prepared by:</b> ..... <div style="text-align: center; font-size: small;">(Name)</div>	<b>Signature</b> .....				
<b>Witnessed by:</b> ..... <div style="text-align: center; font-size: small;">(Name)</div>	<b>Signature</b> .....				



### 13.2 Example of a data flow chart for offering and attendance

