



TUTORIAL (for use with DEMO version)

<http://bohemia.freehostia.com/smallGEMS/>

Login Username = **smallgems**

Password = **demo**

Note: Freehostia will log out access to the database if idle-time is 5 mins or more.

Do the following lesson steps in order. Do NOT experiment at this stage – you can play after the lesson, but please, ONLY with the **new member names** that you add. Other people are also using this SmallGEMS demo version to practise and learn.

PART 1 - MEMBERS

1. **READ** the first section of information under the blue-header MEMBERS. You will look at EVENTS a little later in Step 8.
2. **Click on ADD new member.** Complete info for 1 new person, make sure the status is FULL MEMBER. This will trigger the membership-fee-payment pop-up window.
3. **Add the payment date VERY CAREFULLY.** It is very easy to forget to add a date or enter the date incorrectly. USE **dd/mm/yy**
4. **Click** on UPGRADE to add the payment record to the database. IF successful choose **View Member List** – this will close the popup window and load the Member List in the main window.
*Sometimes you don't want to replace the content displaying the main window. In this case choose **Close This Window**. You can then perform the following useful step.*
5. **Right click on Members** link in the page banner, to open the list of members in a new tab/window.
Members are listed firstly grouped by their current status: *Full members, casuals, email-only*, then sorted alphabetically by first name. The date in **red** indicates an expired DUE date.
6. **Click on an expired member's name** and change his/her status to CASUAL. **Click on UPGRADE** to record the changes in the database. IF successful choose **View Member List**.
*The updated member list is displayed. **Look for** your changed member name now sorted further down the list with other casual members.*
7. Now **use the Member-List Search tool** (top of the page). Choose **Address** from the drop down list, and then type **tinseltown** into the empty field. Tick the little box next to **show Ex-members** and then click on **GO**. You should find at least 4 records.
8. Now perform a search for **Last Name** matching **S***. You should find at least 3 records.



PART 2 - EVENTS

There are 4 different types of event. The following steps explain how to create 3 of these event-types: **meetings** (record attendance, fees are optional), **income** (sale of merchandise/assets), and **expenses**. The 4th type are **membership payments**, which was covered in Part-1 of the tutorial, and can only be recorded when adding or updating a Member's record.

9. **Return** to the previous tab/window (Admin Homepage – Instructions)
10. **READ** the next section of information under the blue-header EVENTS.
11. **Click on Events** link in the page banner, to display the Event reports page.
12. Perform a search for **All Events** and type in a **start date** and an **end date** for the search. Then **click on GO**.

TIP: I suggest using the dates 1/1/70 to 1/1/08 – most systems will default to 01 January 1970 if a date is omitted or entered incorrectly when adding data to the database. I chose 08 as a year set in advance of tomorrow's date. In this way you will see all possible records in the database.

13. **Perform searches** for each of the different event-search types offered in the drop-down search list. **Compare the results** to get a good understanding of what each report shows.
14. You are now going to **create an event** – set today's **date** and choose **Expense** for the type of event. Follow the instructions on the Event form. Imagine you need to record a series of purchases associated with hosting a group meeting.
15. **Add and save** 2 or 3 expense items/records, do NOT lock the event. Verify the number of records saved and sub-total amount (showing in blue header) match your entries.
16. Open the **Events report page** (Events link in the navigation bar) and perform an **Expense Summary search** for today's date (or range of dates). Find your Expense Event and note that this entry has not been locked. Click on the **Update link**. If you want, add another expense item, save and then **lock the event**.
17. Now it's time to create a **Meeting** event. Set today's date, follow the instructions on the Event form. **Click on Create Event**.
18. You can adjust the fees for this meeting if you have additional expenses to cover. **Click on Set Meeting Fees**.



19. **Click on Display Meeting Attendance Checklist.** You will need to tick off the names of members who attend the meeting. Check and/or adjust the amount that they pay, particularly if they are intending to change their membership status – and the meeting fee is set differently.

IF a casual member decides to pay the Full-Membership fee you can click on their name to update their status and receive the special Member Payment. **DO NOT** record the Full-Membership fee on the Attendance Checklist.

DO NOT lock the meeting until the end of the meeting or after all late arrivals have been checked off.

20. The last event to create is **Other Income** – set today's **date** and follow the instructions on the Event form. Imagine you have some t-shirts, CDs or raffle tickets to sell at the meeting. You will need to record a series of individual sales that will be grouped under this event.
21. **Add and save** 2 or 3 sales items/records, do NOT lock the event **until** you have verified the number of records saved and sub-total amount (showing in blue header) match your entries.
22. Finally, check your entries using the **Events report page**.

That brings you to the end of this Tutorial. Continue practicing if you desire – at least until you feel confident enough to start adding entries to your own installation.

Should you run into difficulties (it's easy to get the dates mucked up or lock entries by mistake) don't panic. We will reset the database from time to time as needed. If you feel strongly that you would like the database reset for you to continue practicing OR should you find that something appears to be broken, please contact us via the SmallGEMS support forum.

<http://www.ozshop.net/ozforum>