Genesis Sports Club Administration System USER MANUAL

1 CONTENTS

2.	Intr	oduction	3
	2.1.	Guiding Principles	3
	2.2.	Member Statuses	3
3.	Me	mber Functions	4
	3.1.	Registration	4
	3.2.	Login	5
	3.3.	Profile	5
	3.4.	Profile: Update Personal Details	6
	3.5.	Profile: Suspend Membership	6
	3.6.	Profile: Resign Membership	6
	3.7.	Profile: Confirm Membership for New Season	6
	3.8.	Profile: Renew Membership	6
4.	Adr	ninistrator Functions	7
	4.1.	User Types	7
	4.2.	Login	7
	4.3.	Members	8
	4.4.	Admin Checks	9
	4.5.	Configuration > Membership Options	9
	4.6.	Configuration > Payment Options	10
	4.7.	Configuration > Settings > Mail Templates	10
	4.8.	Configuration > Settings > Messages	12
	4.9.	Configuration > Settings > Seasons	12
	4.10.	Configuration > Settings > Mailing Lists	13
	4.11.	App Settings > General	13
	4.12.	App Settings > Users	14

2 INTRODUCTION

2.1. GUIDING PRINCIPLES

- Capture only the information that is needed. Several fields on the current form have never been used.
- Have a simpler login system. Many users forget their login details, most likely because they're used only once a year.
- Give the club's administrators more insight into the club's membership, particularly at the beginning of a new season.
- Give the club's administrators more control over the site. The current system relies heavily
 on the website developer/manager configuring the site for a new season and dealing with
 various issues members have with login, mailing list subscriptions, etc.
- Decouple the management system from the website. This will make it easier to manage both.
- Design the system to be more flexible to and easier to extend from a development perspective.

2.2. MEMBER STATUSES

A member can have one of the following statuses:

Active The person is an active member of the club.

Unconfirmed The person has not yet confirmed whether they are playing for the

club in the latest (current) season.

Resigned The person has resigned from the club.

Membership Temporarily

Suspended

The person has temporarily suspended their membership. This is intended to be used when a member will not be playing in the latest (current) season (e.g., due to injury or travel), but wants to remain a member and play in the next season (or possibly later in the current

season).

Debtor The member has been flagged as a debtor with outstanding money

owing to the club.

Inactive The member is no longer active for some unknown reason.

Each time a member's status is changed, a new status entry is made and their previous one becomes historical (in other words, a status entry is never directly modified).

3. MEMBER FUNCTIONS

3.1. REGISTRATION

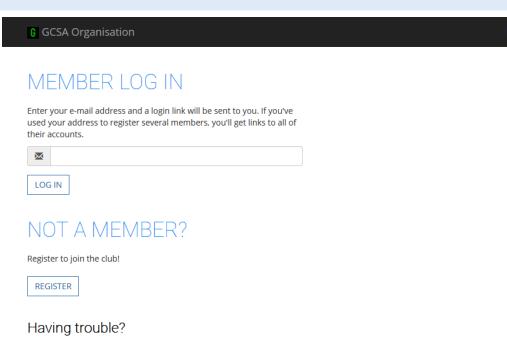
	Log In	Register
IB!		
1		
#		
	1	IB!

- To begin the registration process, the member has to enter their last name, first name and ID number. Using these, the system performs looks for existing profiles in two ways, one using the member's full name, the other using their ID number. If a profile is found in either check, the member is presumed to be registered and is notified of this (and cannot continue to register).
- If no profiles are found, the registration process can continue. It is completed once all mandatory fields are filled in.
- Once registration is completed, the member's profile is created and several things happen:
- The member is assigned a Member Status of Active.
 - 1. An Admin Check is created for the member. (See section 4.4.)
 - 2. The member is subscribed to the mailing list for their section (gender).
 - 3. If the member has included their parent's e-mail address and has specified that the parent wants to be subscribed to the mailing list, they are added to the same mailing list.
 - 4. The member is sent a mail confirming their registration.
 - 5. The administrators are sent a mail notifying them of the new registration.

Note:

- There is an option to close the site to new member registrations.
- Multiple members can be registered using the same e-mail address.

3.2. LOG IN

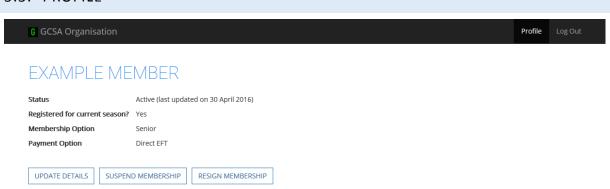


- To log into the site, the member must provide the e-mail address they registered with.
- The site then finds all members associated with the address and generates a unique login link for each one.
- An e-mail containing all of the links is sent to the address.

If you're having trouble with anything, please send us a mail.

• The login links are valid for a certain number of hours; once they have expired, the member must request new links. The time for which they last can be set (the default is 72 hours).

3.3. PROFILE



- When the member logs in, they are presented with a basic profile page. What they can do from here depends on their Member Status.
- If they are Active, they can update their personal details, or suspend or resign their membership.
- If they have a status of *Unconfirmed*, they can confirm their membership for the new season, or suspend or resign it.
- If they have Resigned, they can renew their membership.

- If they have Suspended their membership, they can renew it.
- If they are marked as Inactive, they can renew, suspend or resign their membership.
- If they have been flagged as a Debtor, they cannot do anything.

3.4. PROFILE: UPDATE PERSONAL DETAILS

- If the member's e-mail address is changed, their old address will be removed from the mailing list and their new one will be added. The same happens to their parent's address if it is changed.
- If the parent's option to be subscribed to the mailing list is changed, they will be subscribed or unsubscribed as needed.
- The member cannot change their membership or payment options during the season. If these need to be changed, an administrator must do so.

3.5. PROFILE: SUSPEND MEMBERSHIP

- When suspending their membership, the member can provide a reason for doing so (this is not mandatory though).
- Their status is changed to *Suspended* and they are sent a confirmation mail.
- The administrators are sent a notification mail.
- The member and their parent are not removed from the mailing list.

3.6. PROFILE: RESIGN MEMBERSHIP

- When resigning their membership, the member can provide a reason for doing so (this is not mandatory though).
- Their status is changed to *Resigned*.
- The member is sent a confirmation mail.
- The administrators are sent a notification mail.
- The member and their parent are removed from the mailing list.

3.7. PROFILE: CONFIRM MEMBERSHIP FOR NEW SEASON

- The member is presented with their personal and membership details and can change them.
- Once the member confirms their membership, they are marked as Active.

3.8. PROFILE: RENEW MEMBERSHIP

- The member is presented with their personal and membership details and can change them.
- The member is marked as *Active*.
- The member is subscribed to the mailing list.
- If the option to subscribe the member's parent to the mailing list was checked, they are subscribed.
- The administrators are sent a notification mail.

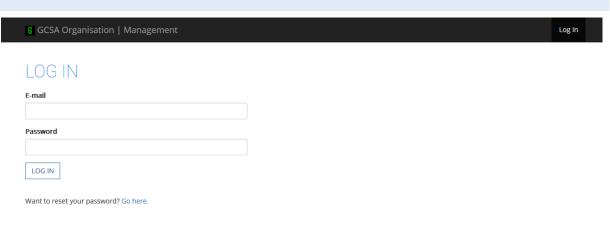
4 ADMINISTRATOR FUNCTIONS

4.1. USER TYPES

The website developer/manager is a Super Administrator. There should be at least one (but ideally no more than one) other Super Administrator from the club's committee and they can create other users as is required.

	ACCESS		
PAGE	User	Administrator	Super Administrator
Members	•	•	•
Admin Checks	•	•	•
Configuration		•	•
Membership Options		•	•
Payment Options		•	•
Settings			
Mail Templates		•	•
Messages		•	•
Seasons		•	•
Mailing Lists			•
App Settings			
General			•
Users			•

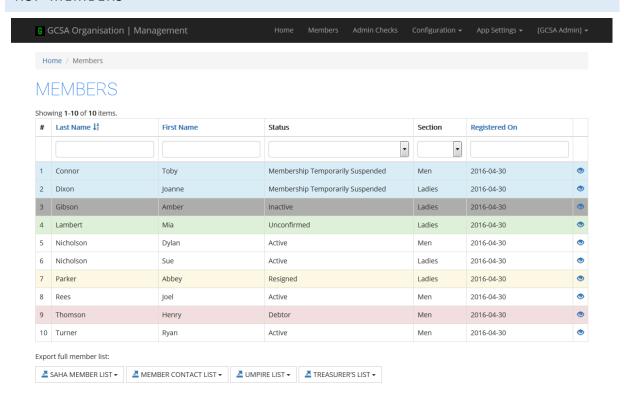
4.2. LOG IN



Admin users log in using a standard e-mail and password form.

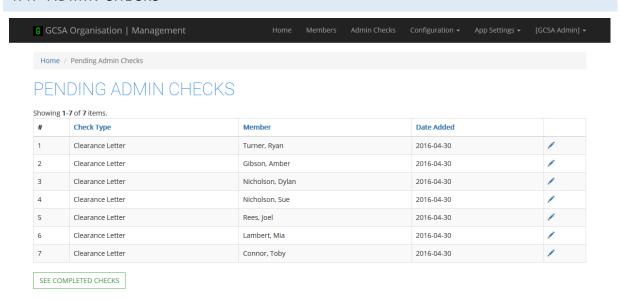
If a user has forgotten their password, they can request a password reset link, which will be mailed to them. Using this link they can log in and change their password. The link expires once they have changed their password or after 24 hours have passed.

4.3. MEMBERS



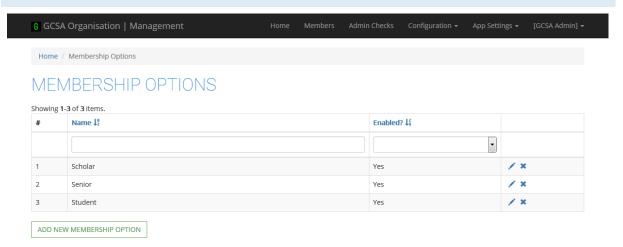
- The user is presented with a list of the members and their current statuses, which can be filtered and ordered by various columns. The members are highlighted according to their status
- There are also buttons to download the following Excel exports: SAHA Member List, Member Contact List, Umpire List, and the Treasurer's List.
- The user can click to view a member's profile. On the profile page presented, they can also
 edit the member's details, change their status, and subscribe and unsubscribe the member
 and their parent from the mailing list.

4.4. ADMIN CHECKS



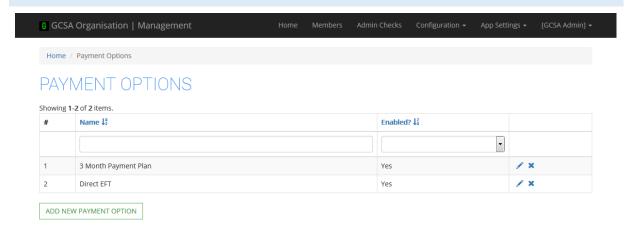
- The page presents a list of open (not yet completed) admin checks. These can be updated and marked as completed.
- There is a button to take the user to a page that lists the completed admin checks.

4.5. CONFIGURATION > MEMBERSHIP OPTIONS



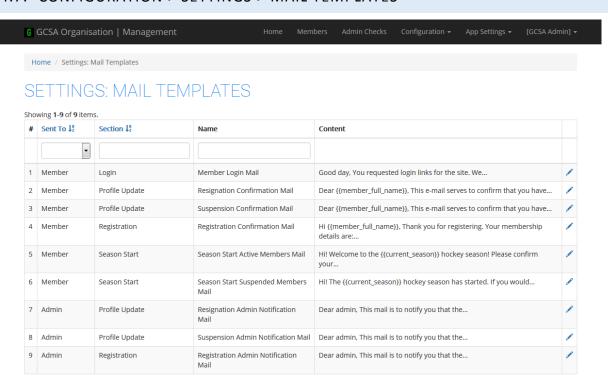
- The page lists the existing membership options.
- New options can be added.
- Existing options can be renamed and disabled (or re-enabled).

4.6. CONFIGURATION > PAYMENT OPTIONS



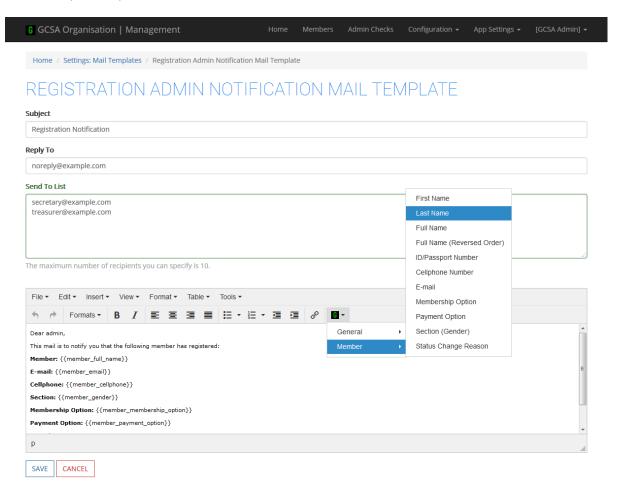
- The page lists the existing payment options.
- New options can be added.
- Existing options can be renamed and disabled (or re-enabled).

4.7. CONFIGURATION > SETTINGS > MAIL TEMPLATES



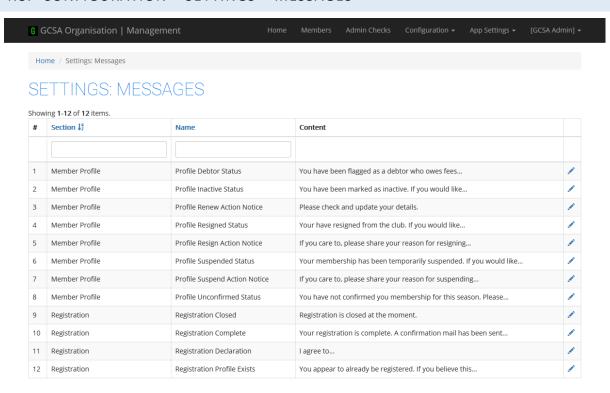
- The page lists the available templates for mail sent to members and admins.
- The subject, reply-to address and contents of each template can be edited. In the case of admin mails, the addresses that must receive the mails can also be changed.
- Special tags can be added to the content body. Which tags are available depends on the template being edited. These tags represent different information fields and are replaced with the relevant information when the mail is sent out.

- For example: if the tag { {member_full_name} } is in the template body it will be replaced with the member's full name (First_Name Last_Name) when the mail is sent to them.
- The templates for management system users are not available for editing. Specifically, these are the mails sent when a new user is added, a user's details are updated, and when a user requests a password reset.



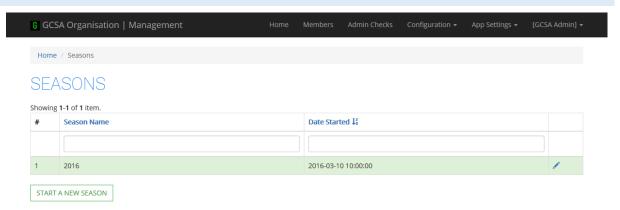
A mail template example showing the tag function.

4.8. CONFIGURATION > SETTINGS > MESSAGES



- Messages that are shown to members throughout the site are listed on this page.
- The contents of each message can be edited. General tags (for the current season, current year and the organisation's name) are available to be used.

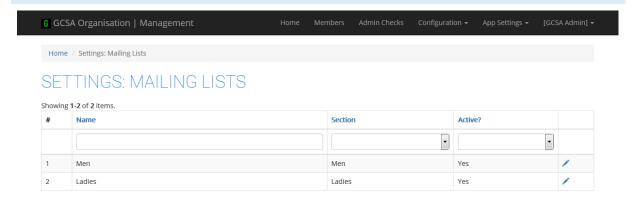
4.9. CONFIGURATION > SETTINGS > SEASONS



- The seasons are listed on this page, with the current one highlighted in green.
- The name of each season can be edited, but nothing else.
- A new season can be started with the option of sending each member a mail asking them to confirm that they are playing or to login and suspend or resign their membership.
 - Only members with Active and Suspended statuses will receive mails.
- When a new season is started, member statuses are changed as follows:

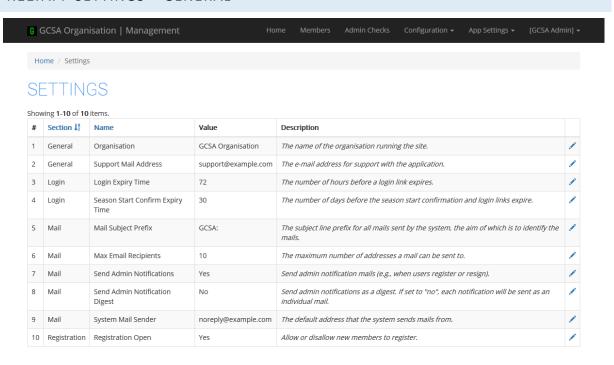
- Unconfirmed becomes Inactive: if a member has a status of Unconfirmed at the start
 of a new season it means they have had it for the entire previous season and it is
 probably safe to assume that they are not active.
- Active becomes Unconfirmed: active members need to confirm that they are playing in the new season.

4.10. CONFIGURATION > SETTINGS > MAILING LISTS



- The available mailing lists are listed. Each list is for a particular gender (section) and members are subscribe according to their gender.
- The lists can be enabled and disabled, and their connection settings (which are technical in nature) can be adjusted.

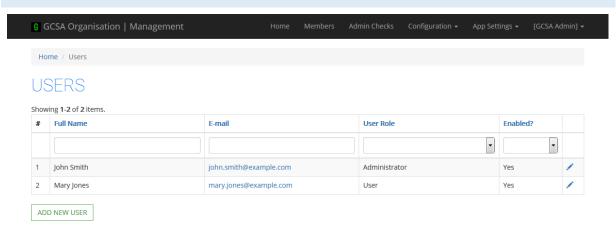
4.11.APP SETTINGS > GENERAL



- These are various settings for the management system. They will probably be configured once by the website developer/manager.
- Notable options:

- Organisation: the organisation's name.
- Mail Subject Prefix: the prefix for the subject each mail sent by the system. This should be short and identify the organisation.
- Send Admin Notifications: whether or not the admins should receive mails (as specified in previous sections of this document).
- Registration Open: whether or not the website will allow new member registrations.

4.12.APP SETTINGS > USERS



- The users of the management system are listed here.
- When a new user is added, their login details are mailed to them.
- A user's details can be changed. There is an option to notify them of the change (via a mail),
 which is useful if their password has had to be changed. Users can also be disabled.
- The mail templates for these two above mails are not available for editing.