

# Genesis Sports Club Administration System

## USER MANUAL

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## 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:

<b>Active</b>	The person is an active member of the club.
<b>Unconfirmed</b>	The person has not yet confirmed whether they are playing for the club in the latest (current) season.
<b>Resigned</b>	The person has resigned from the club.
<b>Membership Temporarily Suspended</b>	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).
<b>Debtor</b>	The member has been flagged as a debtor with outstanding money owing to the club.
<b>Inactive</b>	The member is no longer active for some unknown reason.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



#### JOIN THE CLUB!

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
ID/Passport Number *	<input type="text"/>

BEGIN REGISTRATION

- 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

### MEMBER LOG IN

Enter your e-mail address and a login link will be sent to you. If you've used your address to register several members, you'll get links to all of their accounts.

LOG IN

### NOT A MEMBER?

Register to join the club!

REGISTER

### Having trouble?

If you're having trouble with anything, please [send us a mail](#).

- 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.
- 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

### EXAMPLE MEMBER

Status	Active (last updated on 30 April 2016)
Registered for current season?	Yes
Membership Option	Senior
Payment Option	Direct EFT

UPDATE DETAILS

SUSPEND MEMBERSHIP

RESIGN MEMBERSHIP

- 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.

PAGE	ACCESS		
	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

GCSA Organisation | Management Log In

## LOG IN

E-mail

Password

Want to reset your password? [Go here.](#)

- 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

GCSA Organisation | Management Home Members Admin Checks Configuration App Settings [GCSA Admin]

Home / Members

## MEMBERS

Showing 1-10 of 10 items.

#	Last Name	First Name	Status	Section	Registered On	
1	Connor	Toby	Membership Temporarily Suspended	Men	2016-04-30	
2	Dixon	Joanne	Membership Temporarily Suspended	Ladies	2016-04-30	
3	Gibson	Amber	Inactive	Ladies	2016-04-30	
4	Lambert	Mia	Unconfirmed	Ladies	2016-04-30	
5	Nicholson	Dylan	Active	Men	2016-04-30	
6	Nicholson	Sue	Active	Ladies	2016-04-30	
7	Parker	Abbey	Resigned	Ladies	2016-04-30	
8	Rees	Joel	Active	Men	2016-04-30	
9	Thomson	Henry	Debtor	Men	2016-04-30	
10	Turner	Ryan	Active	Men	2016-04-30	

Export full member list:

[SAHA MEMBER LIST](#)
[MEMBER CONTACT LIST](#)
[UMPIRE LIST](#)
[TREASURER'S LIST](#)

- 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

GCSA Organisation | Management Home Members Admin Checks Configuration App Settings [GCSA Admin]

Home / Pending Admin Checks

### PENDING ADMIN CHECKS

Showing 1-7 of 7 items.

#	Check Type	Member	Date Added	
1	Clearance Letter	Turner, Ryan	2016-04-30	
2	Clearance Letter	Gibson, Amber	2016-04-30	
3	Clearance Letter	Nicholson, Dylan	2016-04-30	
4	Clearance Letter	Nicholson, Sue	2016-04-30	
5	Clearance Letter	Rees, Joel	2016-04-30	
6	Clearance Letter	Lambert, Mia	2016-04-30	
7	Clearance Letter	Connor, Toby	2016-04-30	

[SEE COMPLETED 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

GCSA Organisation | Management Home Members Admin Checks Configuration App Settings [GCSA Admin]

Home / Membership Options

### MEMBERSHIP OPTIONS

Showing 1-3 of 3 items.

#	Name	Enabled?	
	<input type="text"/>	<input type="text"/>	
1	Scholar	Yes	
2	Senior	Yes	
3	Student	Yes	

[ADD NEW MEMBERSHIP OPTION](#)

- 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

GCSA Organisation | Management Home Members Admin Checks Configuration ▾ App Settings ▾ [GCSA Admin] ▾

Home / Payment Options

### PAYMENT OPTIONS

Showing 1-2 of 2 items.

#	Name ↕	Enabled? ↕	
	<input type="text"/>	<input type="checkbox"/>	
1	3 Month Payment Plan	Yes	<a href="#">✎</a> <a href="#">✕</a>
2	Direct EFT	Yes	<a href="#">✎</a> <a href="#">✕</a>

[ADD NEW PAYMENT OPTION](#)

- 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

GCSA Organisation | Management Home Members Admin Checks Configuration ▾ App Settings ▾ [GCSA Admin] ▾

Home / Settings: Mail Templates

### SETTINGS: MAIL TEMPLATES

Showing 1-9 of 9 items.

#	Sent To ↕	Section ↕	Name	Content	
	<input type="text"/>	<input type="text"/>	<input type="text"/>		
1	Member	Login	Member Login Mail	Good day, You requested login links for the site. We...	<a href="#">✎</a>
2	Member	Profile Update	Resignation Confirmation Mail	Dear {{member_full_name}}, This e-mail serves to confirm that you have...	<a href="#">✎</a>
3	Member	Profile Update	Suspension Confirmation Mail	Dear {{member_full_name}}, This e-mail serves to confirm that you have...	<a href="#">✎</a>
4	Member	Registration	Registration Confirmation Mail	Hi {{member_full_name}}, Thank you for registering. Your membership details are:...	<a href="#">✎</a>
5	Member	Season Start	Season Start Active Members Mail	Hi! Welcome to the {{current_season}} hockey season! Please confirm your...	<a href="#">✎</a>
6	Member	Season Start	Season Start Suspended Members Mail	Hi! The {{current_season}} hockey season has started. If you would...	<a href="#">✎</a>
7	Admin	Profile Update	Resignation Admin Notification Mail	Dear admin, This mail is to notify you that the...	<a href="#">✎</a>
8	Admin	Profile Update	Suspension Admin Notification Mail	Dear admin, This mail is to notify you that the...	<a href="#">✎</a>
9	Admin	Registration	Registration Admin Notification Mail	Dear admin, This mail is to notify you that the...	<a href="#">✎</a>

- 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.

The screenshot displays the 'REGISTRATION ADMIN NOTIFICATION MAIL TEMPLATE' configuration page. It features a navigation bar at the top with 'GCSA Organisation | Management' and various menu items. Below the navigation, a breadcrumb trail shows 'Home / Settings: Mail Templates / Registration Admin Notification Mail Template'. The main content area is titled 'REGISTRATION ADMIN NOTIFICATION MAIL TEMPLATE' and contains several form sections: 'Subject' (with the value 'Registration Notification'), 'Reply To' (with the value 'noreply@example.com'), and 'Send To List' (with values 'secretary@example.com' and 'treasurer@example.com'). A dropdown menu is open over the 'Send To List' field, listing various member attributes such as 'First Name', 'Last Name', 'Full Name', 'ID/Passport Number', 'Cellphone Number', 'E-mail', 'Membership Option', 'Payment Option', 'Section (Gender)', and 'Status Change Reason'. Below the 'Send To List' field, a note states 'The maximum number of recipients you can specify is 10.' The main editor area contains a rich text editor with a toolbar and a preview of the email template content, including tags like `{{member_full_name}}`, `{{member_email}}`, `{{member_cellphone}}`, `{{member_gender}}`, `{{member_membership_option}}`, and `{{member_payment_option}}`. At the bottom of the editor, there are 'SAVE' and 'CANCEL' buttons.

*A mail template example showing the tag function.*

## 4.8. CONFIGURATION > SETTINGS > MESSAGES

GCSA Organisation | Management Home Members Admin Checks Configuration App Settings [GCSA Admin]

Home / Settings: Messages

### SETTINGS: MESSAGES

Showing 1-12 of 12 items.

#	Section	Name	Content	
	<input type="text"/>	<input type="text"/>		
1	Member Profile	Profile Debtor Status	You have been flagged as a debtor who owes fees...	
2	Member Profile	Profile Inactive Status	You have been marked as inactive. If you would like...	
3	Member Profile	Profile Renew Action Notice	Please check and update your details.	
4	Member Profile	Profile Resigned Status	Your have resigned from the club. If you would like...	
5	Member Profile	Profile Resign Action Notice	If you care to, please share your reason for resigning...	
6	Member Profile	Profile Suspended Status	Your membership has been temporarily suspended. If you would like...	
7	Member Profile	Profile Suspend Action Notice	If you care to, please share your reason for suspending...	
8	Member Profile	Profile Unconfirmed Status	You have not confirmed you membership for this season. Please...	
9	Registration	Registration Closed	Registration is closed at the moment.	
10	Registration	Registration Complete	Your registration is complete. A confirmation mail has been sent...	
11	Registration	Registration Declaration	I agree to...	
12	Registration	Registration Profile Exists	You appear to already be registered. If you believe this...	

- 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

GCSA Organisation | Management Home Members Admin Checks Configuration App Settings [GCSA Admin]

Home / Seasons

### SEASONS

Showing 1-1 of 1 item.

#	Season Name	Date Started	
	<input type="text"/>	<input type="text"/>	
1	2016	2016-03-10 10:00:00	

[START A NEW SEASON](#)

- 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

GCSA Organisation | Management Home Members Admin Checks Configuration App Settings [GCSA Admin]

Home / Settings: Mailing Lists

### SETTINGS: MAILING LISTS

Showing 1-2 of 2 items.

#	Name	Section	Active?	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	
1	Men	Men	Yes	<a href="#">✎</a>
2	Ladies	Ladies	Yes	<a href="#">✎</a>

- 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

GCSA Organisation | Management Home Members Admin Checks Configuration App Settings [GCSA Admin]

Home / Settings

### SETTINGS

Showing 1-10 of 10 items.

#	Section	Name	Value	Description	
1	General	Organisation	GCSA Organisation	The name of the organisation running the site.	<a href="#">✎</a>
2	General	Support Mail Address	support@example.com	The e-mail address for support with the application.	<a href="#">✎</a>
3	Login	Login Expiry Time	72	The number of hours before a login link expires.	<a href="#">✎</a>
4	Login	Season Start Confirm Expiry Time	30	The number of days before the season start confirmation and login links expire.	<a href="#">✎</a>
5	Mail	Mail Subject Prefix	GCSA:	The subject line prefix for all mails sent by the system, the aim of which is to identify the mails.	<a href="#">✎</a>
6	Mail	Max Email Recipients	10	The maximum number of addresses a mail can be sent to.	<a href="#">✎</a>
7	Mail	Send Admin Notifications	Yes	Send admin notification mails (e.g., when users register or resign).	<a href="#">✎</a>
8	Mail	Send Admin Notification Digest	No	Send admin notifications as a digest. If set to "no", each notification will be sent as an individual mail.	<a href="#">✎</a>
9	Mail	System Mail Sender	noreply@example.com	The default address that the system sends mails from.	<a href="#">✎</a>
10	Registration	Registration Open	Yes	Allow or disallow new members to register.	<a href="#">✎</a>

- 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

GCSA Organisation | Management
Home Members Admin Checks Configuration ▾ App Settings ▾ [GCSA Admin] ▾

[Home](#) / [Users](#)

### USERS

Showing 1-2 of 2 items.

#	Full Name	E-mail	User Role	Enabled?	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
1	John Smith	<a href="mailto:john.smith@example.com">john.smith@example.com</a>	Administrator	Yes	<a href="#">✎</a>
2	Mary Jones	<a href="mailto:mary.jones@example.com">mary.jones@example.com</a>	User	Yes	<a href="#">✎</a>

ADD NEW USER

- 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.