



National Database
Administrators Manual
Swimming New Zealand



JULY 2016

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How do I view a summary of my club's membership?

1

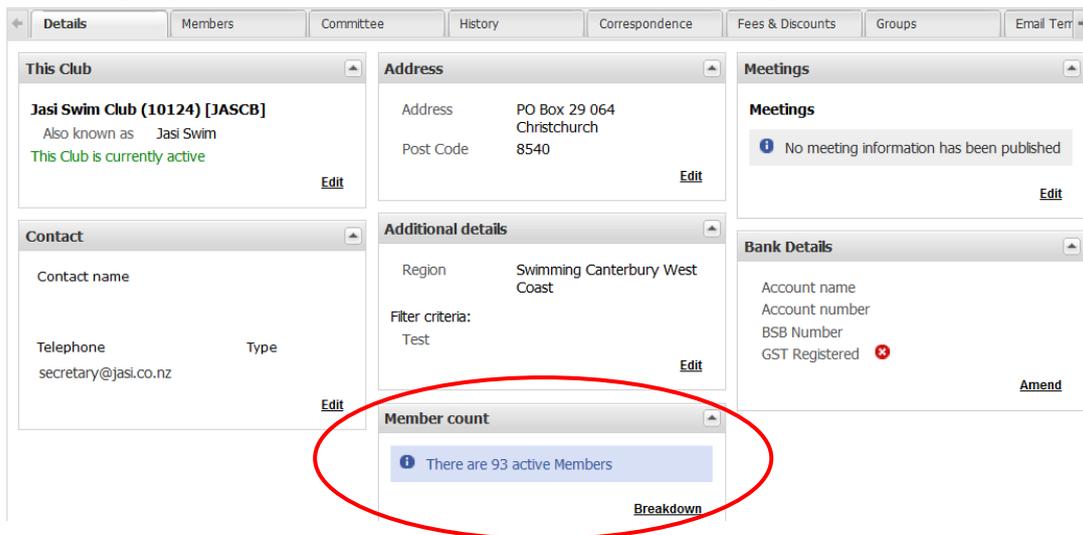
Click the Club tab and begin typing the name of your club. Select your club from the drop down list.



The screenshot shows a navigation bar with tabs: Person, Club, Region, and Zone. The 'Club' tab is highlighted with a red circle. Below the tabs is a search input field containing the text 'ok'. A dropdown menu is open, showing a search result: '[10204] Okato Swimming Taranaki | Star rating Club'. To the right of the dropdown are two links: 'Advanced' and 'Last Accessed'.

2

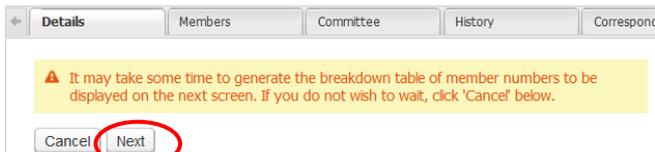
Click on Breakdown on the Member count section of the Details tab.



The screenshot shows the 'Details' tab for a club. The club name is 'Jasi Swim Club (10124) [JASCB]'. The 'Member count' section is highlighted with a red circle and contains the text 'There are 93 active Members'. Below this text is a 'Breakdown' link. Other sections include 'Address', 'Contact', 'Additional details', 'Meetings', and 'Bank Details'.

3

Click next



The screenshot shows a dialog box with a yellow warning message: 'It may take some time to generate the breakdown table of member numbers to be displayed on the next screen. If you do not wish to wait, click 'Cancel' below.' Below the message are two buttons: 'Cancel' and 'Next'. The 'Next' button is highlighted with a red circle.

4

You then get three tabs to take details from.

Gender | Membership Type | Payment method

Code	Description	Count
U	Unknown	50
F	Female	26
M	Male	17
	Total	93

Return

Gender | **Membership Type** | Payment method

Code	Description	Count
2	Competitive Swimmer	68
7	Administrator	13
5	Coach	6
6	Non-Voting Technical Official	4
1	Club Swimmer	2
	Total	93

Return

Gender | Membership Type | **Payment method**

Code	Description	Count
C	Cheque / Cash	93
	Total	93

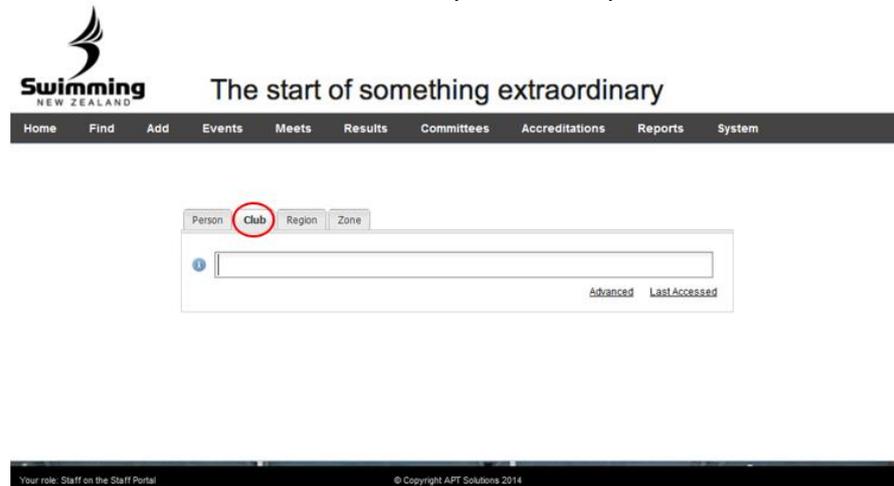
Return



How do I view a full listing of my club's members?

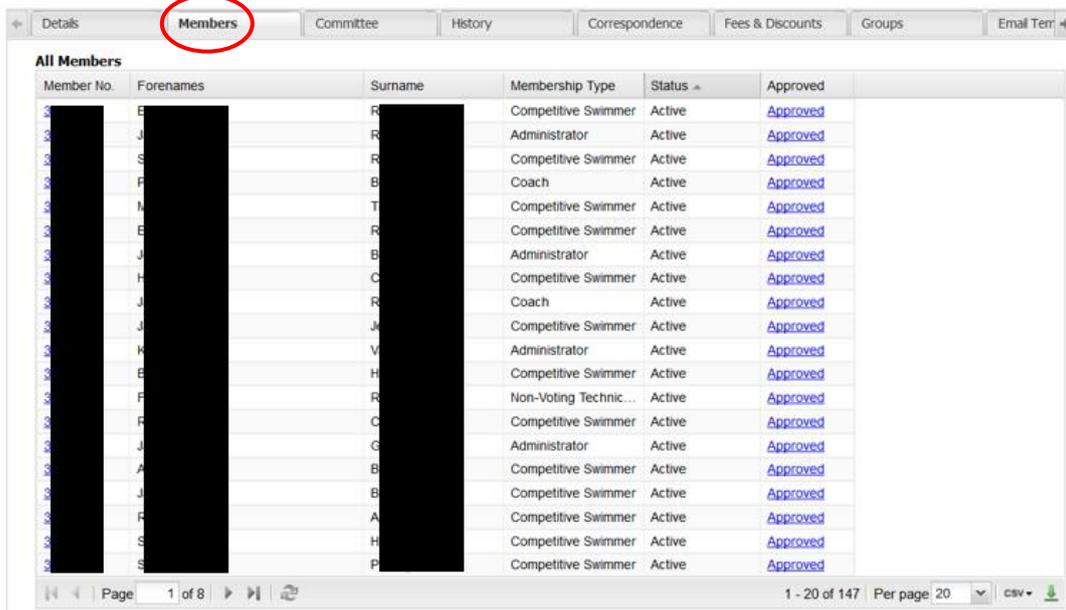
1

Click on the club tab and access your club's profile.



2

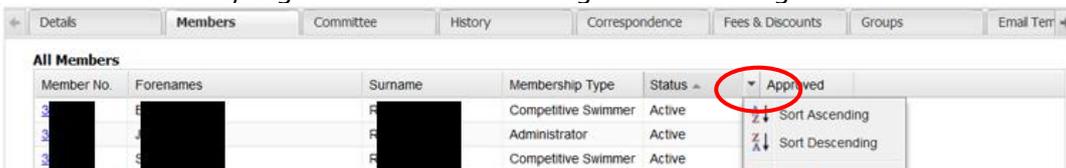
Select the members tab



The screenshot shows the 'All Members' table with the following columns: Member No., Forenames, Surname, Membership Type, Status, and Approved. The 'Members' tab is circled in red. The table contains 17 rows of member data. At the bottom, there is a pagination control showing 'Page 1 of 8' and '1 - 20 of 147'.

Member No.	Forenames	Surname	Membership Type	Status	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Administrator	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Coach	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Administrator	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Coach	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Administrator	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Non-Voting Technic...	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Administrator	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved

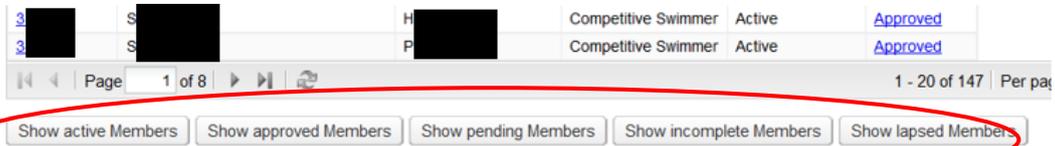
This screen lists all members in your club. The list can be sorted in various ways by moving your mouse over the column titles and selecting the sorting method available, e.g. Surnames ascending or descending.



The screenshot shows the 'All Members' table with the 'Approved' column header circled in red. A dropdown menu is open over the 'Approved' column, showing two sorting options: 'Sort Ascending' and 'Sort Descending'.

Member No.	Forenames	Surname	Membership Type	Status	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
3	[Redacted]	[Redacted]	Administrator	Active	Approved
3	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved

Using the buttons located on the bottom left-hand side of the list, you can choose to filter the member list to show Only Lapsed Members or All Members.



Also use the download button on the bottom right to export the list of members you are viewing to a csv file.



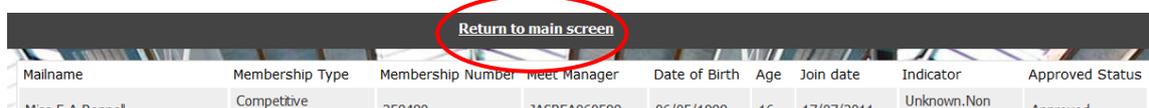
Selecting the highlighted Member Number will show the following member profile.

Mailname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
Miss E [redacted]	Competitive Swimmer	3 [redacted]	[redacted]	[redacted]	16	17/07/2011	Unknown.Non Paying	Approved

Personal	Profile	Events & Meets	Accreditation	Correspondence	History	Biometrics																	
<p>This person</p> <p>Miss E [redacted] ([redacted])</p> <p>Add to Basket Personal details</p> <p>Add to Card run</p>	<p>Web Access</p> <p>Web User Id [Not set]</p> <p>Password [Not set]</p> <p>Edit</p>	<p>Status</p> <p>✔ Record [redacted] is currently active</p> <p>Lapse</p>	<p>Approved Member Status</p> <p>Approved</p> <p>Edit</p>	<p>Subscriptions</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Competitive Swimmer</th> </tr> </thead> <tbody> <tr> <td>Pay Method</td> <td>Cheque / Cash</td> </tr> <tr> <td>Paid By</td> <td></td> </tr> <tr> <th>Description</th> <th>Value</th> </tr> <tr> <td>Club subscriptions</td> <td></td> </tr> <tr> <td>Region / State / National</td> <td>0.00</td> </tr> <tr> <td>Total</td> <td>0.00</td> </tr> </tbody> </table> <p>Subs due today 0.00</p> <p>Total due 0.00</p> <p>Discount 0.00</p> <p>Discounted Amount</p> <p>Manual pay Pay Now Transactions Edit</p>	Type	Competitive Swimmer	Pay Method	Cheque / Cash	Paid By		Description	Value	Club subscriptions		Region / State / National	0.00	Total	0.00	<p>Contacts</p> <p>Type Email addresses</p> <p>Personal [redacted]</p> <p>Log received email Send quick email</p> <p>Type [redacted]</p> <p>Telephone [redacted]</p> <p>Moblie [redacted]</p> <p>Log incoming call Log outgoing call</p> <p>Edit contact details</p>	<p>Club</p> <p>Jasi Swim Club</p> <p>PO Box 29 064</p> <p>Christchurch</p> <p>8540</p> <p>Select</p>	<p>Secondary Club</p> <p>Select</p>	<p>Region</p> <p>Swimming Canterbury West Coast (code: 3)</p> <p>(normally derived from Club)</p>	<p>Personal Address</p> <p>Address [redacted]</p> <p>Post Code [redacted]</p> <p>Edit</p>
Type	Competitive Swimmer																						
Pay Method	Cheque / Cash																						
Paid By																							
Description	Value																						
Club subscriptions																							
Region / State / National	0.00																						
Total	0.00																						

3

To return to the full list of members, select Return to main Screen at the top of the new page.



How can I export a full list of my members and their information?

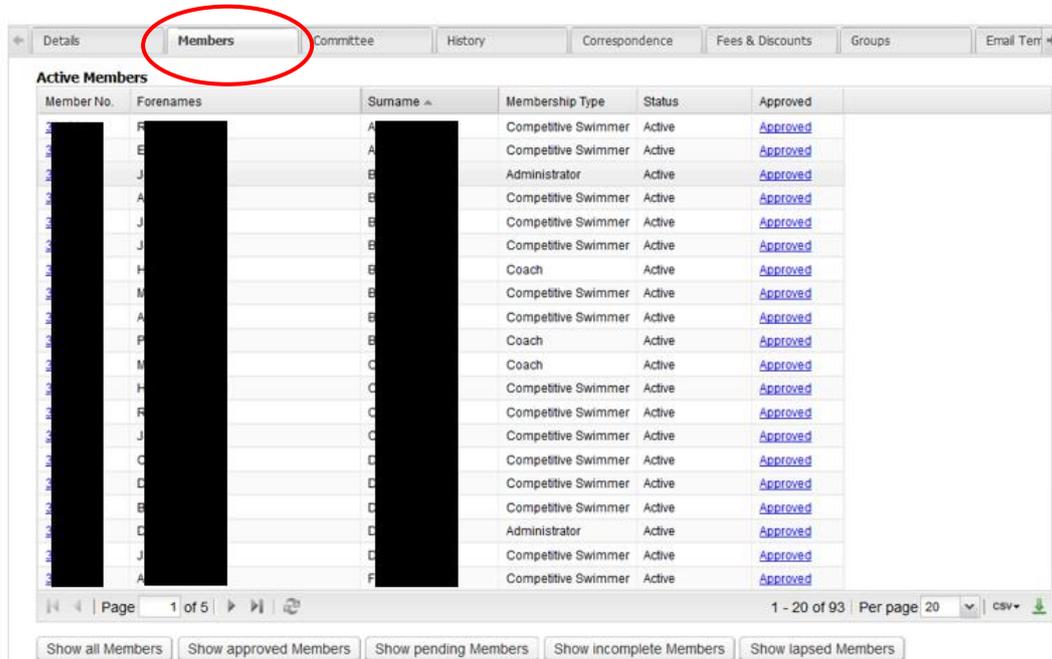
1

Click the Club tab and begin typing the name of your club. Select your club from the drop down list.



2

Click on the Members tab to display a list of your members. Only the Approved/Active (paid) members will be displayed by default.

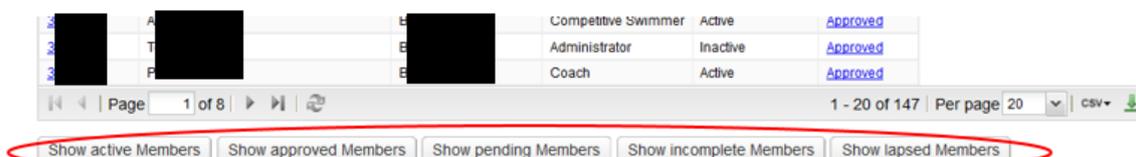


Member No.	Forenames	Surname	Membership Type	Status	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Administrator	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Coach	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Coach	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Coach	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Administrator	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved

3

You can export the following lists of members from buttons at the bottom of the page:

- Active Members
- Approved Members only
- Pending Members only
- Incomplete Members only
- Lapsed Members



Member No.	Forenames	Surname	Membership Type	Status	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Competitive Swimmer	Active	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Administrator	Inactive	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Coach	Active	Approved

4

To export the members listing, hover over the bottom right-hand side of the table, to display the download options as below.



Then select whether you would like to download the members listing as a CSV or XLS file. The download will begin shortly. You can open this spreadsheet in excel and view your members details.

The following fields will be automatically downloaded in the export:

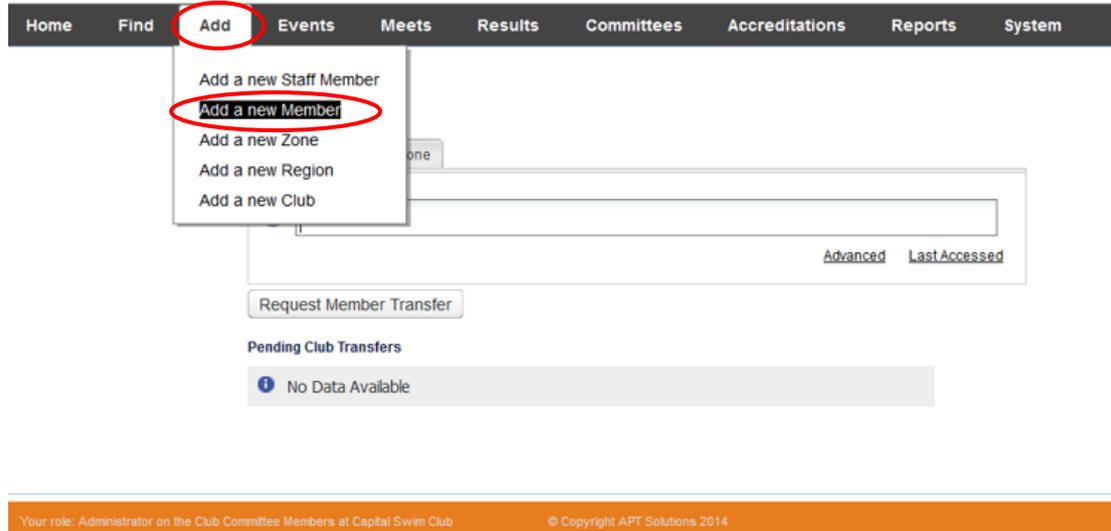
- Membership Number
- First Name
- Last Name
- Address
- Addr2
- Addr3
- Suburb
- City
- Postcode
- Email Address
- Telephone Number
- Mobile Number
- Emergency Contact Name
- Emergency Contact Number
- DOB
- Age
- Gender
- Indicator
- Status Approved
- National Member Type
- Zonal Member Type
- Regional Member Type
- Club Member Type
- Meet Manager ID
- Club
- Region



How do I create a new member?

1

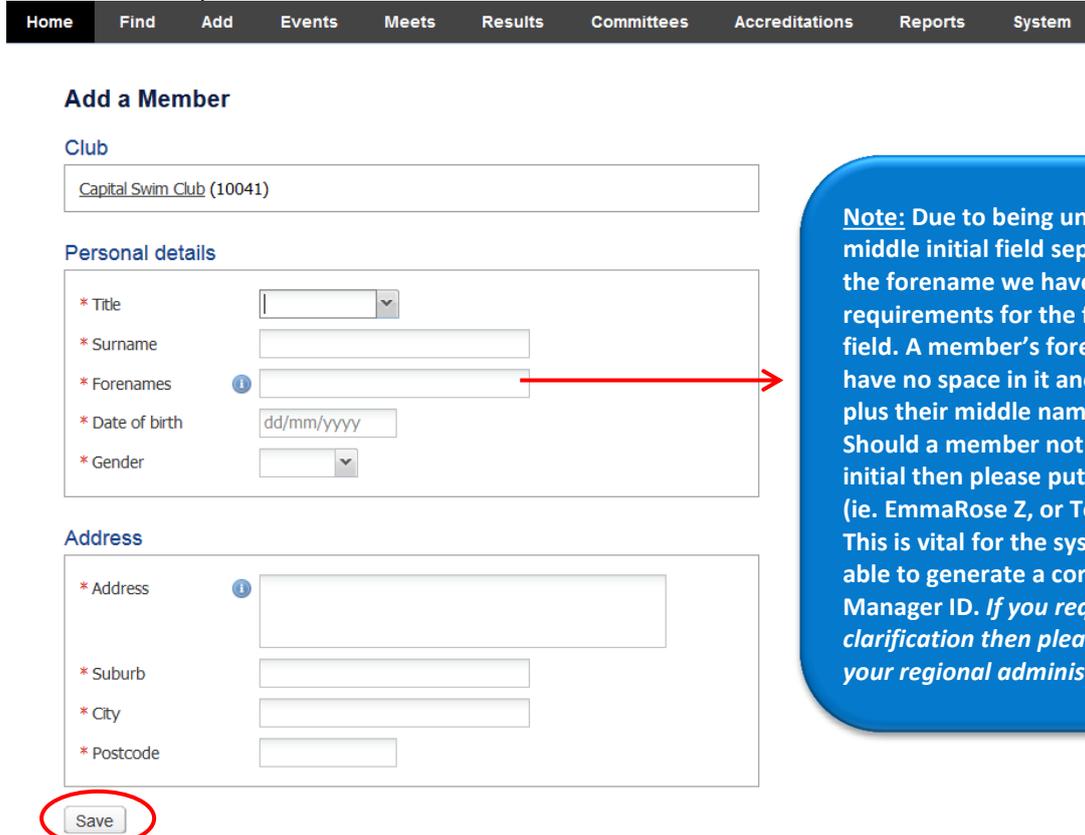
Select Add a new Member from the Add tab on the homepage, once you have logged in.



The screenshot shows the system homepage with a navigation menu at the top. The 'Add' tab is highlighted with a red circle. A dropdown menu is open under 'Add', and 'Add a new Member' is selected with a red circle. Other options in the menu include 'Add a new Staff Member', 'Add a new Zone', 'Add a new Region', and 'Add a new Club'. Below the menu, there are buttons for 'Request Member Transfer' and 'Pending Club Transfers' (No Data Available). At the bottom, there is a footer with the text: 'Your role: Administrator on the Club Committee Members at Capital Swim Club © Copyright APT Solutions 2014'.

2

Enter in all required fields and then select the Save button.



The screenshot shows the 'Add a Member' form. The 'Club' field is filled with 'Capital Swim Club (10041)'. The 'Personal details' section includes fields for Title, Surname, Forenames, Date of birth, and Gender. The 'Address' section includes fields for Address, Suburb, City, and Postcode. The 'Save' button at the bottom is circled in red. A red arrow points from the 'Forenames' field to the 'Note' box on the right.

Note: Due to being unable to have middle initial field separated from the forename we have some special requirements for the forename field. A member's forename MUST have no space in it and then a space plus their middle name initial letter. Should a member not have a middle initial then please put Z in its place. (ie. EmmaRose Z, or TeAroha C). This is vital for the system to be able to generate a correct Meet Manager ID. *If you require further clarification then please contact your regional administrator.*

3

Then complete at least one telephone and email field as well as the Membership Type, before clicking the Save button.

Home Find Add Events Meets Results Committees Accreditations Reports System

Add Contact Details

Contacts

At least one telephone and email has to be entered

Personal Email

Work Email

Work Telephone

Direct Telephone

Home Telephone

Mobile

Fax

Membership Type

* Type

Back Save

4

You can then see the members details and will be able to go in to view the members profile.

Home Find Add Events Meets Results Committees Accreditations Reports System

Member's Details

Member's Details

Membership Number 945038
 Membership Type Administrator
 Name Mrs B Erkens
 Type Administrator
 Web Login User ID
 Club [Capital Swim Club](#)
 Total Subscription 0.00

Breakdown of subscriptions

Details	Subscription	Discount
Mrs Becki Erkens (945038)	0.00	0.00

Family Members

Surname	First Name	Date of Birth	Membership Type
No Data Available			

Add Family Member Make Payment Edit Member

From here you can go into [Add Family Member](#) or [Make Payment](#) but these features are still to be added.

When you click on 'Add family member' you are also able to pull the address.

5

Add Family Member Make Payment **Edit Member**

Edit Member will take you into the new member's profile.

Mainname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
Miss E [REDACTED]	Competitive Swimmer	3 [REDACTED]	[REDACTED]	[REDACTED]	16	17/07/2011	Unknown.Non Paying	Approved

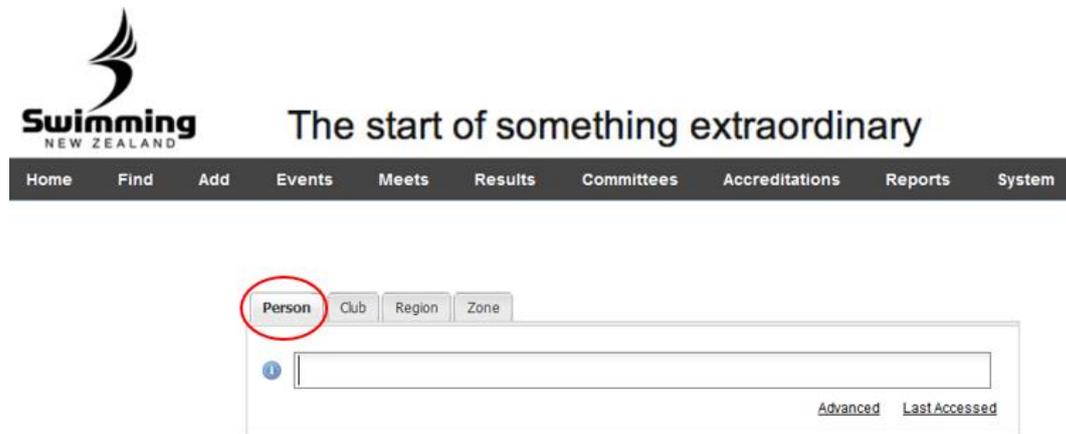
Personal	Profile	Events & Meets	Accreditation	Correspondence	History	Biometrics								
This person Miss E [REDACTED] ([REDACTED]) Add to Basket Personal details Add to Card run		Web Access Web User Id [Not set] Password [Not set] Edit		Status Record [REDACTED] is currently active Lapse										
Contacts Type Email addresses Personal [REDACTED] Log received email Send quick email Type [REDACTED] Telephone [REDACTED] Mobile [REDACTED] Log incoming call Log outgoing call Edit contact details		Club Jasi Swim Club PO Box 29 064 Christchurch 8540 Select		Approved Member Status Approved Edit										
Personal Address Address [REDACTED]		Secondary Club Select		Subscriptions Type Competitive Swimmer Pay Method Cheque / Cash Paid By <table border="1"> <thead> <tr> <th>Description</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Club subscriptions</td> <td></td> </tr> <tr> <td>Region / State / National</td> <td>0.00</td> </tr> <tr> <td>Total</td> <td>0.00</td> </tr> </tbody> </table> Subs due today 0.00 Total due 0.00 Discount Discounted 0.00			Description	Value	Club subscriptions		Region / State / National	0.00	Total	0.00
Description	Value													
Club subscriptions														
Region / State / National	0.00													
Total	0.00													
Region Swimming Canterbury West Coast (code: 3) (normally derived from Club)														



How do I link members together as families?

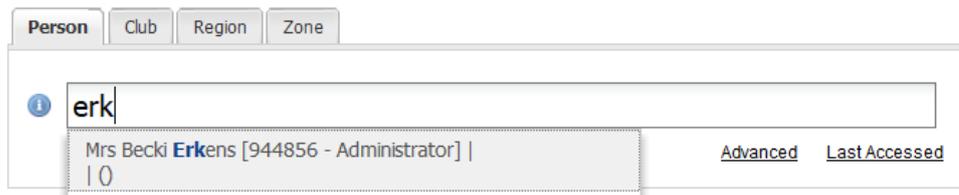
1

In the Person tab...



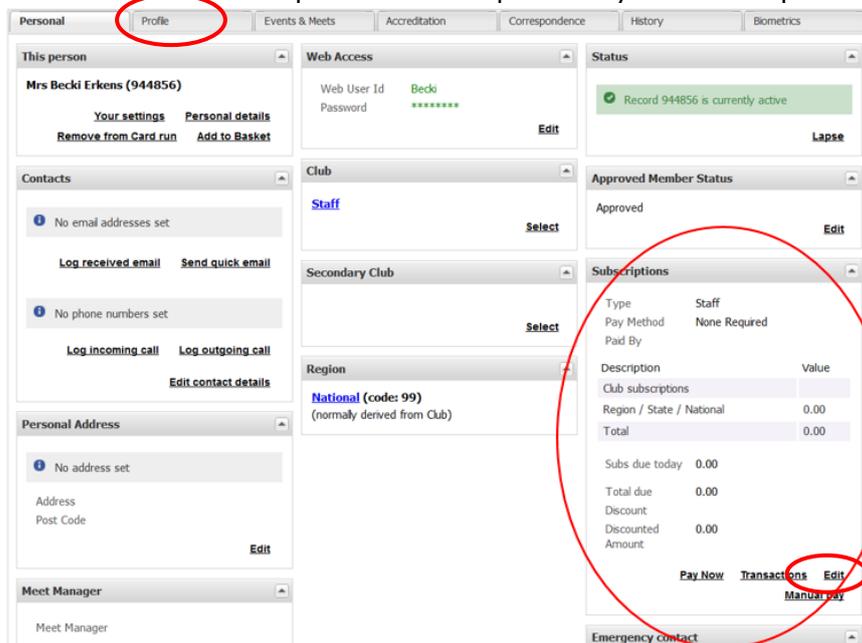
2

Type the members surname in the search bar, select the correct member name when the dropdown bar appears.



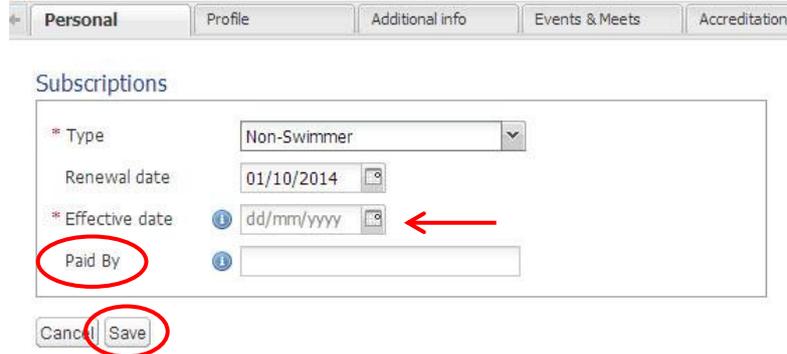
3

Clicking back to the 'Personal' tab will bring up the below screen. Click 'Edit' button under 'Subscriptions' to set up a family relationship.



4

Enter the name of the person you wish to set up the family relationship with in the 'Paid by' box. This will establish this person as the Primary in the family relationship. The member you are editing becomes the Secondary.



Personal Profile Additional info Events & Meets Accreditation

Subscriptions

* Type Non-Swimmer

Renewal date 01/10/2014

* Effective date dd/mm/yyyy

Paid By

Cancel Save

6

Repeat the process with any remaining family members.

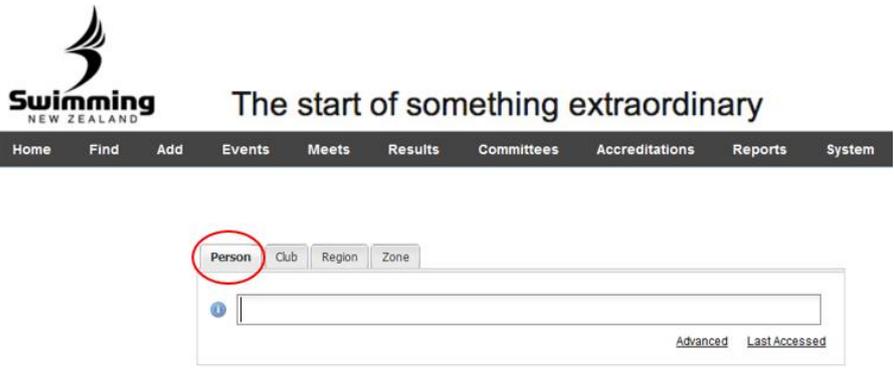


How do I add a single member to a group?

< The Groups functionality is still being developed >

1

In the Person tab..



The screenshot shows the website header with the Swimming New Zealand logo and the slogan 'The start of something extraordinary'. Below the header is a navigation menu with options: Home, Find, Add, Events, Meets, Results, Committees, Accreditations, Reports, System. A search bar is visible with the 'Person' tab highlighted in a red circle. Other tabs in the search bar include Club, Region, and Zone. The search bar contains an information icon and a text input field. Below the input field are links for 'Advanced' and 'Last Accessed'.

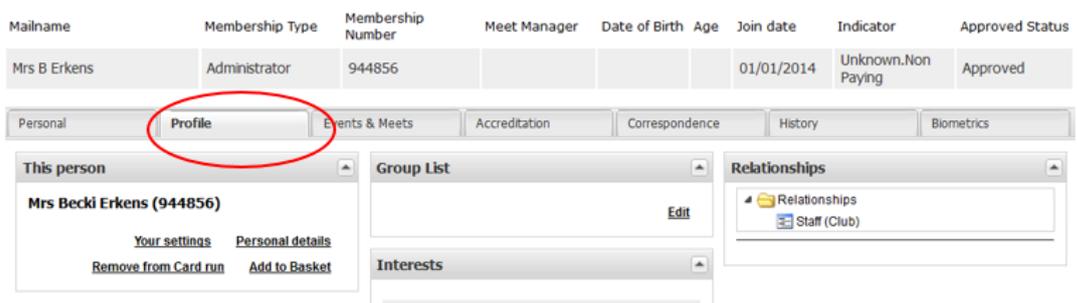
Type the members surname in the search bar, select the correct member name when the dropdown bar appears.



This screenshot shows the search bar with the text 'erk' entered. A dropdown menu has appeared below the search bar, displaying the search results: 'Mrs Becki Erkens [944856 - Administrator] | 10'. The 'Person' tab is still selected in the search bar. Links for 'Advanced' and 'Last Accessed' are visible to the right of the dropdown.

2

Click on the Profile tab.



The screenshot displays the member profile for Mrs B Erkens. At the top, there is a table with the following data:

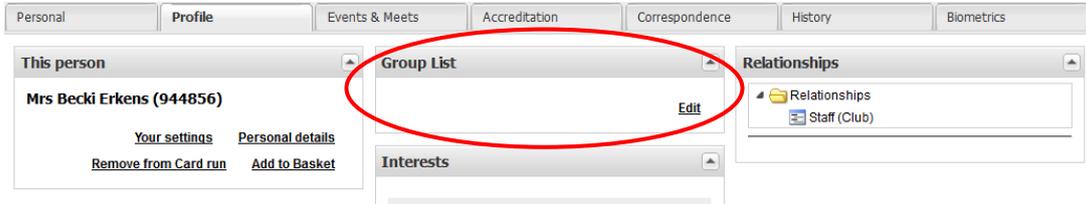
Mailname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
Mrs B Erkens	Administrator	944856				01/01/2014	Unknown.Non Paying	Approved

Below the table is a navigation menu with tabs: Personal, Profile (highlighted in a red circle), Events & Meets, Accreditation, Correspondence, History, and Biometrics. The main content area is divided into three sections: 'This person' (showing 'Mrs Becki Erkens (944856)' with links for 'Your settings', 'Personal details', 'Remove from Card run', and 'Add to Basket'), 'Group List' (with an 'Edit' button), and 'Relationships' (showing 'Staff (Club)'). There is also an 'Interests' section.



3

Click on the Edit button in the Group List section.



The screenshot shows a user profile page for Mrs Becki Erkens (944856). The page has a navigation bar with tabs: Personal, Profile, Events & Meets, Accreditation, Correspondence, History, and Biometrics. The main content area is divided into three sections: 'This person', 'Group List', and 'Relationships'. The 'Group List' section is highlighted with a red circle and contains an 'Edit' button. The 'Relationships' section shows a list of relationships, including 'Staff (Club)'. The 'This person' section includes links for 'Your settings', 'Personal details', 'Remove from Card run', and 'Add to Basket'.

Tick the group you want to add the member into, then Save.



How do I approve a membership account?

Going forward, members will have one of two membership statuses:

1. Approved
2. Pending (Not Approved)

Approving a member's account acts as accepting that persons membership into your club. This process should be completed alongside or after the person has made their membership payment. Members renewing with their same club will automatically be approved when they complete their online membership payment, whereas brand-new members will need to be automatically approved by the club Registrar in indicate their membership application has been accepted by the club.

1

Click the Club tab and begin typing the name of your club. Select your club from the drop down list.



The screenshot shows a search interface with tabs for 'Person', 'Club', 'Region', and 'Zone'. The 'Club' tab is selected and circled in red. Below the tabs is a search input field containing the text 'ok'. A dropdown menu is open below the input field, showing a search result: '[10204] Okato Swimming Taranaki | Star rating Club'. To the right of the dropdown are links for 'Advanced' and 'Last Accessed'.

2

Click on the Member tab to view a list of your members. Each member's approval status is located in the column on the far right-hand side of the listing.



The screenshot shows a web interface with several tabs: 'Details', 'Members', 'Committee', 'History', 'Correspondence', 'Fees & Discounts', 'Groups', and 'Email Terr'. The 'Members' tab is selected and circled in red. Below the tabs is a table titled 'All Members'.

Member No.	Forenames	Surname	Membership Type	Status	Approved
944881	Gdfsdfs	Zdfdf	Club Swimmer	Active	Pending
358480	Emily A	Rennell	Competitive Swimmer	Active	Approved
361232	Janice	Rennell	Administrator	Active	Approved
321395	Sinead	Rennell	Competitive Swimmer	Active	Approved

3

To change a member's status click on the link in the Approved column for the person you are updating.

Member No.	Forenames	Surname	Membership Type	Status	Approved
944881	Gdfsdfs	Zdfdf	Club Swimmer	Active	Pending
358480	Emily A	Rennell	Competitive Swimmer	Active	Approved
361232	Janice	Rennell	Administrator	Active	Approved
321395	Sinead	Rennell	Competitive Swimmer	Active	Approved

From the Approved Member Status screen, untick the Approval pending box and click save.

Approved Member Status

Pending Approval

Approval pending

Cancel Save

The member's status will now be updated in the members listing.



How do I create a new membership type?

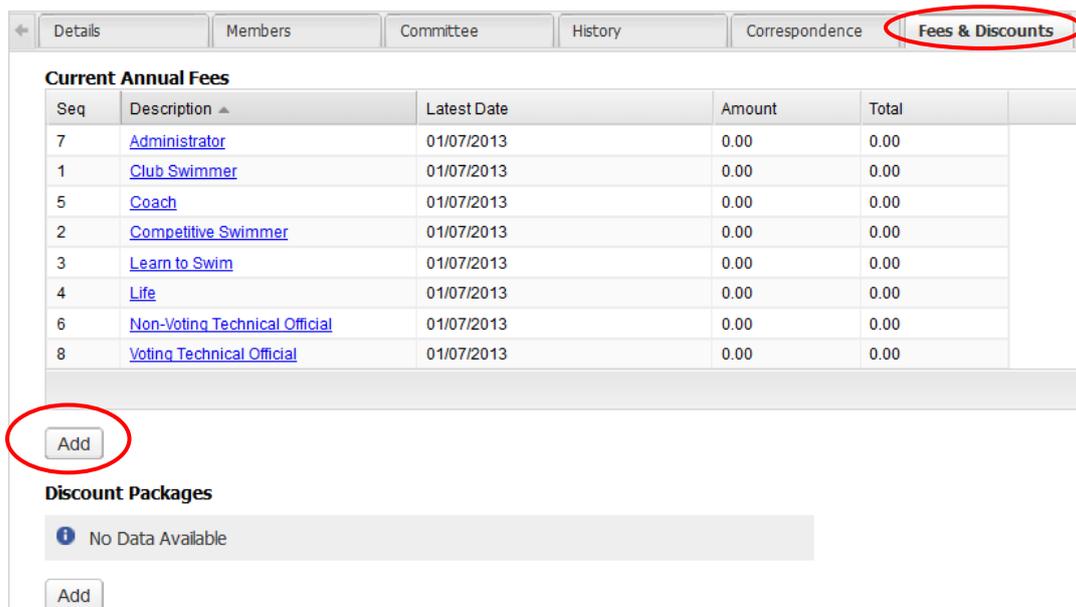
1

Click the Club tab and begin typing the name of your club. Select your club from the drop down list.



2

Select Fees & Discounts



Seq	Description	Latest Date	Amount	Total
7	Administrator	01/07/2013	0.00	0.00
1	Club Swimmer	01/07/2013	0.00	0.00
5	Coach	01/07/2013	0.00	0.00
2	Competitive Swimmer	01/07/2013	0.00	0.00
3	Learn to Swim	01/07/2013	0.00	0.00
4	Life	01/07/2013	0.00	0.00
6	Non-Voting Technical Official	01/07/2013	0.00	0.00
8	Voting Technical Official	01/07/2013	0.00	0.00

Click the Add button located underneath the Current Annual Fees table.

The following settings need to be selected:

- Give the membership a name in the Membership type field.
- Ensure the membership aligns with the correct Region Member type.

Only available once the CMS is in place:

- To make this membership available to new members online (through Join page) ensure Valid-new member is ticked.
- To make this membership available to renewing members online ensure Valid- reinstatement is ticked.

3

Enter your club fee *only* in the Annual sub box, and then Save.

Annual Fee

* Member type	<input type="text"/>	!
Description	<input type="text"/>	
Region Member type	<input type="text"/>	▼
Member type	<input type="text"/>	▼
Sub-total	0.00	
Valid - new members	<input type="checkbox"/>	
Valid - reinstatement	<input type="checkbox"/>	
Obsolete	<input type="checkbox"/>	
Period covered	to 30/12/1968	
Annual sub	<input type="text"/>	←
Total this level	0.00	

Parameters for junior fee type (optional)

Lower age limit	<input type="checkbox"/>	
Upper age limit	<input type="checkbox"/>	
Next Age Change to	<input type="text"/>	▼

Renew as a different type (optional)

Renew As	<input type="text"/>	▼
----------	----------------------	---

Cancel Save

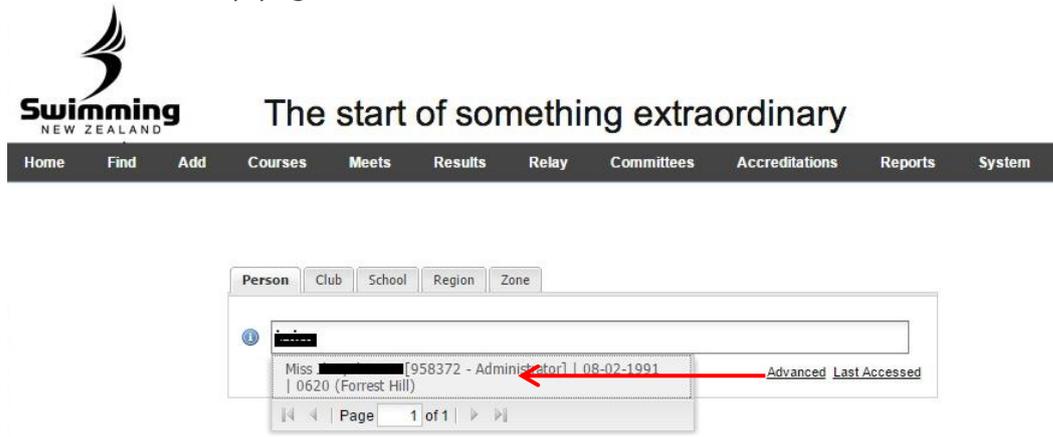


How do I lapse a member?

NOTE: If subscriptions are paid by another member this must be deleted before you are able to lapse them.

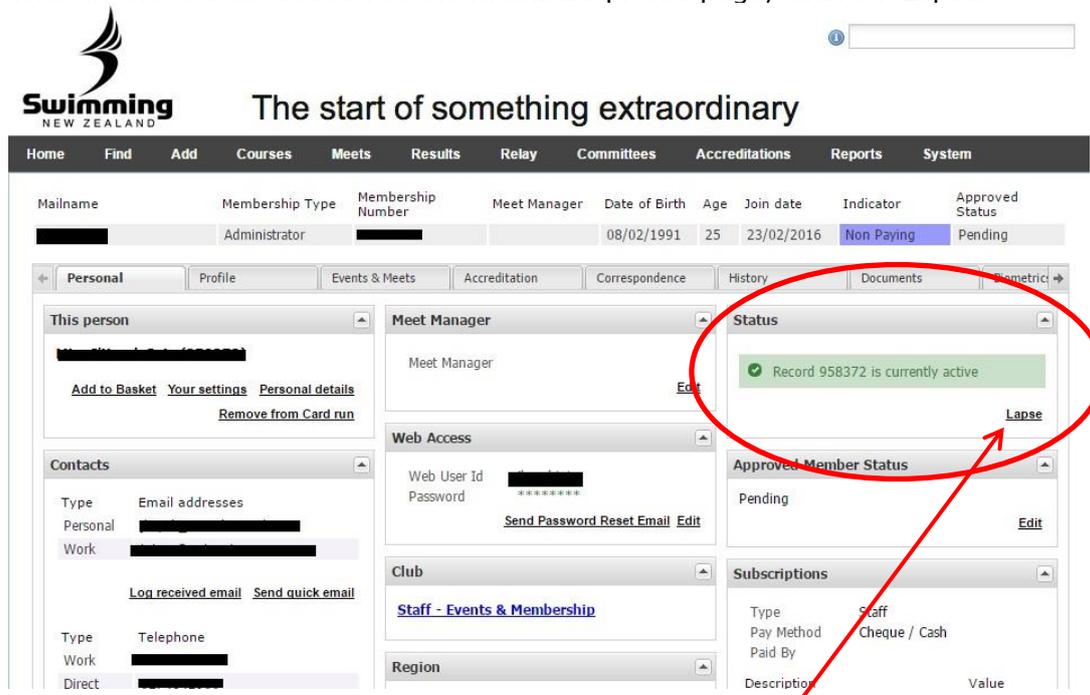
1

Under person, select the members name from the drop down menu on the Database start up page.



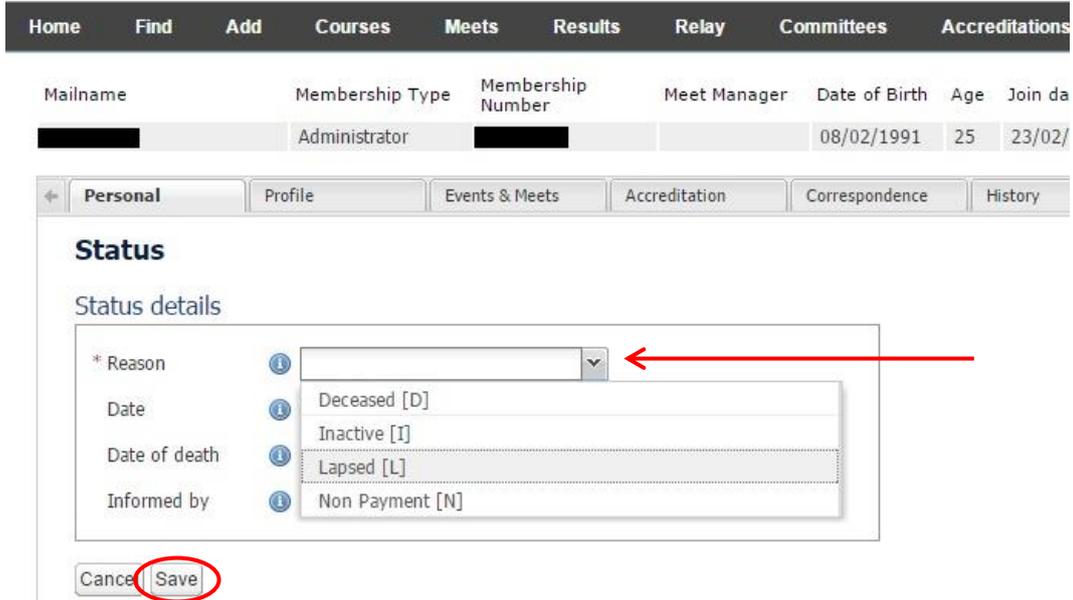
2

Then in the 'status' section of the members profile page, click on 'Lapse.'




3

Then in the 'Reason' drop down menu, click 'Lapse', then 'save'.



Home Find Add Courses Meets Results Relay Committees Accreditations

Mailname: [REDACTED] Membership Type: Administrator Membership Number: [REDACTED] Meet Manager: [REDACTED] Date of Birth: 08/02/1991 Age: 25 Join da: 23/02/

Personal Profile Events & Meets Accreditation Correspondence History

Status

Status details

* Reason: [REDACTED] (dropdown menu open showing: Deceased [D], Inactive [I], Lapsed [L], Non Payment [N])

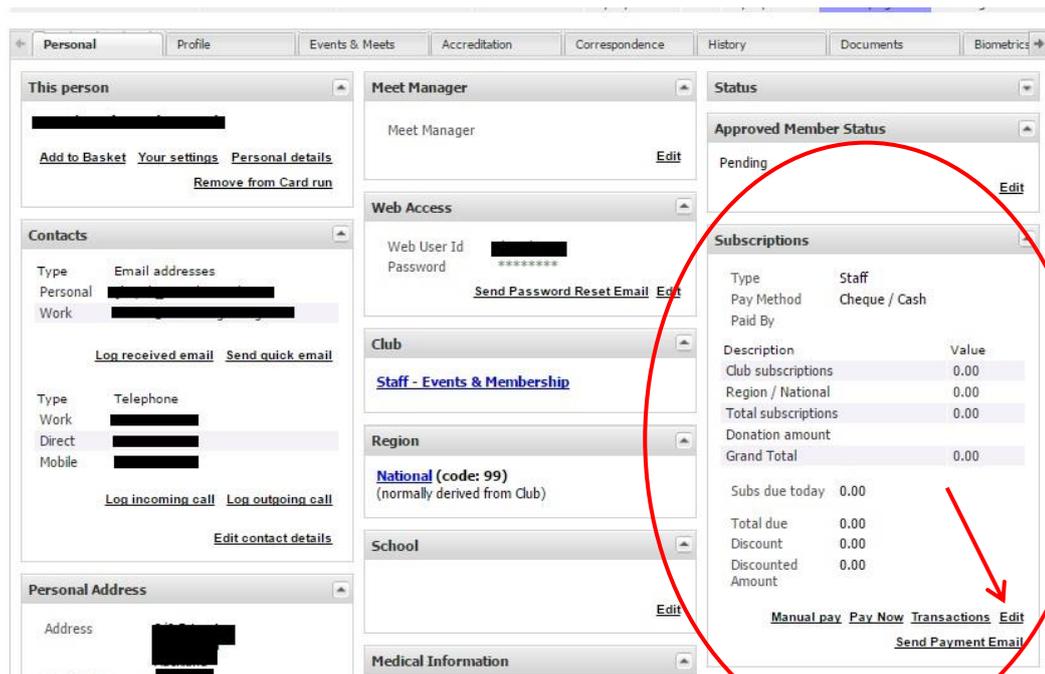
Date: [REDACTED]
Date of death: [REDACTED]
Informed by: [REDACTED]

Cancel Save

However, if the member's subscriptions are paid by someone else then complete the following steps...

4

Go back to the members profile and under 'Subscriptions', click 'Edit'.



Personal Profile Events & Meets Accreditation Correspondence History Documents Biometric

This person
[REDACTED]
[Add to Basket](#) [Your settings](#) [Personal details](#)
[Remove from Card run](#)

Contacts

Type: Personal, Work
Email addresses: [REDACTED]
[Log received email](#) [Send quick email](#)

Type: Work, Direct, Mobile
Telephone: [REDACTED]
[Log incoming call](#) [Log outgoing call](#)
[Edit contact details](#)

Personal Address
Address: [REDACTED]

Meet Manager
Meet Manager: [REDACTED] [Edit](#)

Web Access
Web User Id: [REDACTED]
Password: [REDACTED]
[Send Password Reset Email](#) [Edit](#)

Club
[Staff - Events & Membership](#)

Region
National (code: 99)
(normally derived from Club)

School
[Edit](#)

Medical Information
[Edit](#)

Status
Approved Member Status
Pending [Edit](#)

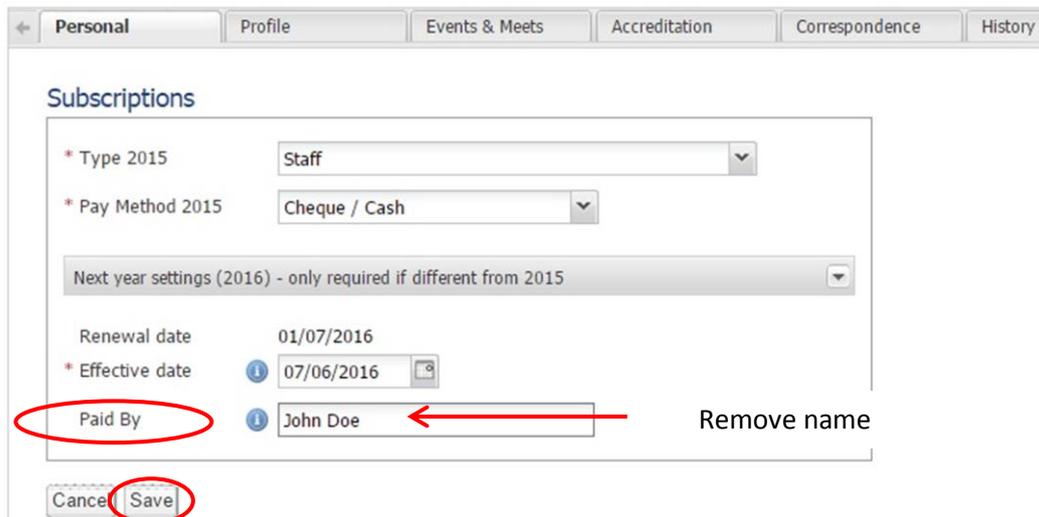
Subscriptions

Type	Staff	Pay Method	Cheque / Cash	Paid By
Description				Value
Club subscriptions				0.00
Region / National				0.00
Total subscriptions				0.00
Donation amount				
Grand Total				0.00
Subs due today	0.00			
Total due	0.00			
Discount	0.00			
Discounted Amount	0.00			

[Manual pay](#) [Pay Now](#) [Transactions](#) [Edit](#)
[Send Payment Email](#)

5

In here you will then remove the persons name in the 'paid by' section and then click 'save'.



Personal Profile Events & Meets Accreditation Correspondence History

Subscriptions

* Type 2015

* Pay Method 2015

Next year settings (2016) - only required if different from 2015

Renewal date 01/07/2016

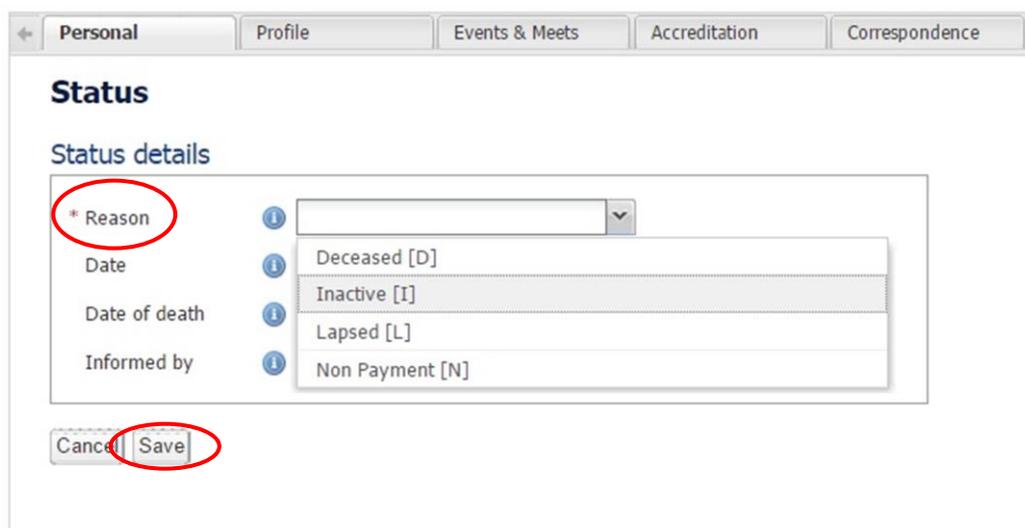
* Effective date

Paid By [Remove name](#)

6

Once the above steps are complete, then the member can be lapsed by going back to the 'status' section in the members profile page and clicking 'Lapse'.

You will then be taken to the below screen once again, where you can then lapse the member by selecting the reason from the drop down menu and then clicking save.



Personal Profile Events & Meets Accreditation Correspondence

Status

Status details

* Reason

Date

Date of death

Informed by

To reinstate the member, go to the members profile, and under the status box click 'reinstate' then hit save.

How do I edit the descriptions of my membership types so they are club-specific?

Adding a Description to your club's membership types will help users to select the appropriate membership type when joining or renewing with your club through a Club, Regional, Zonal or National website.

1

Click the Club tab and begin typing the name of your club. Select your club from the drop down list.



Person **Club** Region Zone

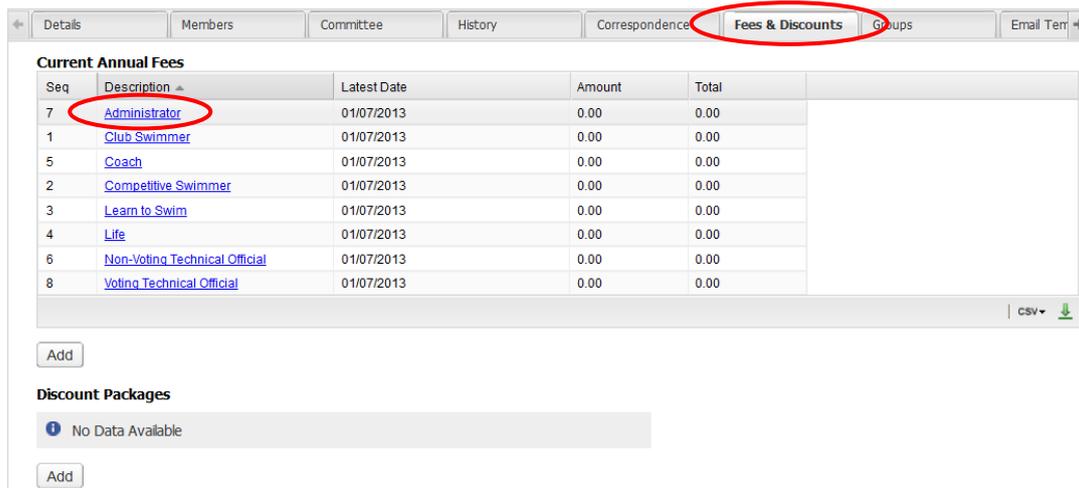
ok

[10204] Okato
Swimming Taranaki | Star rating
Club

Advanced Last Accessed

2

Open the **Fees & Discounts** tab - here you will see a list of Current Annual Fees.



Seq	Description	Latest Date	Amount	Total
7	Administrator	01/07/2013	0.00	0.00
1	Club Swimmer	01/07/2013	0.00	0.00
5	Coach	01/07/2013	0.00	0.00
2	Competitive Swimmer	01/07/2013	0.00	0.00
3	Learn to Swim	01/07/2013	0.00	0.00
4	Life	01/07/2013	0.00	0.00
6	Non-Voting Technical Official	01/07/2013	0.00	0.00
8	Voting Technical Official	01/07/2013	0.00	0.00

Details Members Committee History Correspondence **Fees & Discounts** Groups Email Terr

Add

Discount Packages

No Data Available

Add

Click the title of the membership type under the Description column that you wish to edit.



3

To add a description to the membership type begin typing in the Description field. The text entered in this box will display to users when they join/renew online.

Annual Fee

* Member type	<input type="text" value="Club Swimmer"/>
Description	<input type="text"/>
Region Member type	<input type="text" value="Club Swimmer"/>
Member type	<input type="text" value="Club Swimmer"/>
Sub-total	0.00
Valid - new members	<input checked="" type="checkbox"/>
Valid - reinstatement	<input type="checkbox"/>
Obsolete	<input type="checkbox"/>
Period covered	01/07/2013 to 30/06/2014
Annual sub	<input type="text" value="0"/>
Total this level	0.00

Parameters for junior fee type (optional)

Lower age limit	<input type="checkbox"/>
Upper age limit	<input type="checkbox"/>
Next Age Change to	<input type="text"/>

Renew as a different type (optional)

Renew As	<input type="text"/>
----------	----------------------

Once you have finished editing select the 'Save' button at the bottom of the page.

4

You will see a message to advise the details have been updated once the save was successful. You can then Return to the previous page and complete the process for all other necessary membership types.

The details have been updated.

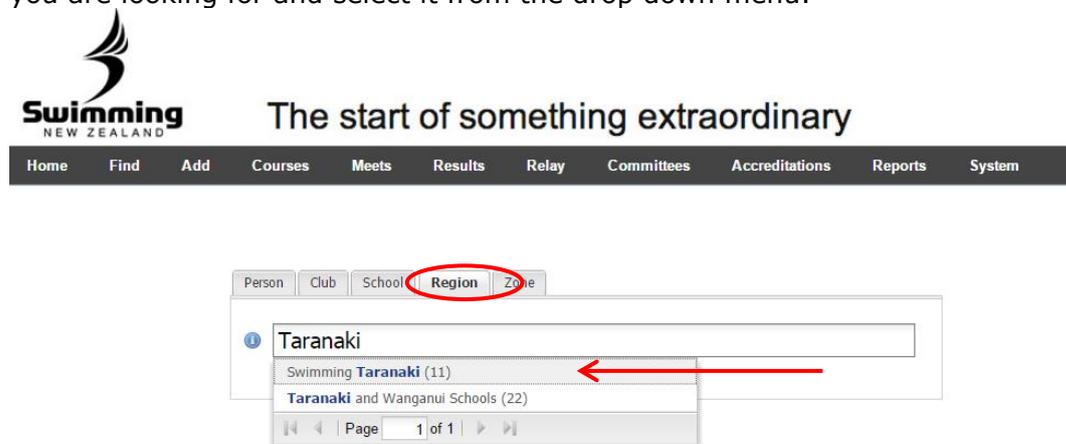
Members will now be able to view a description of what each membership entitles them to do by hovering on the Info icon associated with each membership. **This is in the website component only.**

How does a Regional Administrator download a Membership List?

To get a list of members attached to a specific club and also linked to a region, do the following steps.

1

Once logged into the database, select 'Region' and type in the name of the region you are looking for and select it from the drop down menu.

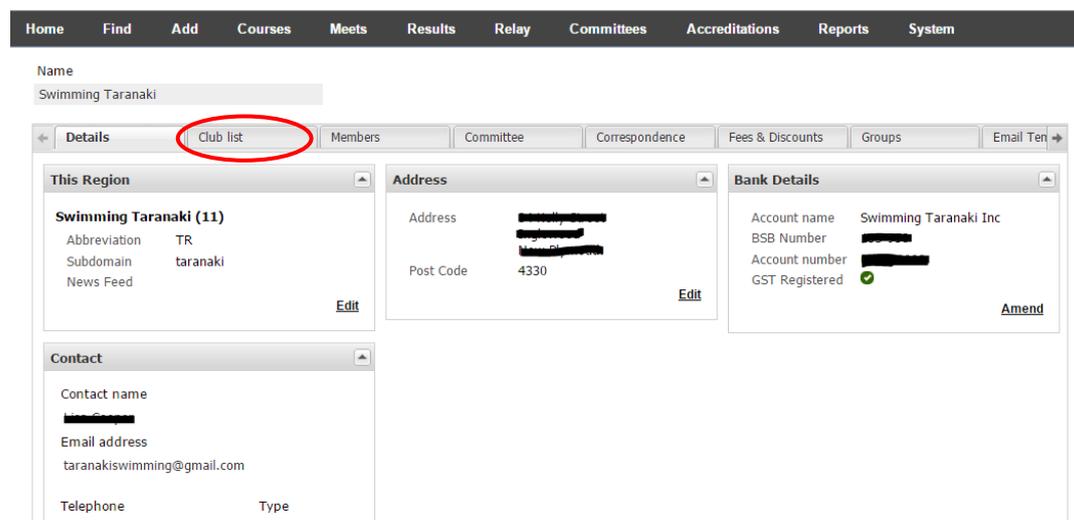


The screenshot shows the website header with the Swimming New Zealand logo and the slogan "The start of something extraordinary". Below the header is a navigation menu with items: Home, Find, Add, Courses, Meets, Results, Relay, Committees, Accreditations, Reports, System. A secondary menu below that includes tabs for Person, Club, School, Region, and Zone. The 'Region' tab is circled in red. A search box contains the text "Taranaki", and a dropdown menu is open showing "Swimming Taranaki (11)" and "Taranaki and Wanganui Schools (22)". A red arrow points to the "Swimming Taranaki (11)" option. The page number "Page 1 of 1" is visible at the bottom of the dropdown.

If you want an entire membership list for your region click on the members tab shown below next to the "Club List" tab and follow steps 4-6. If you are wanting member lists from a specific club follow the steps below.

2

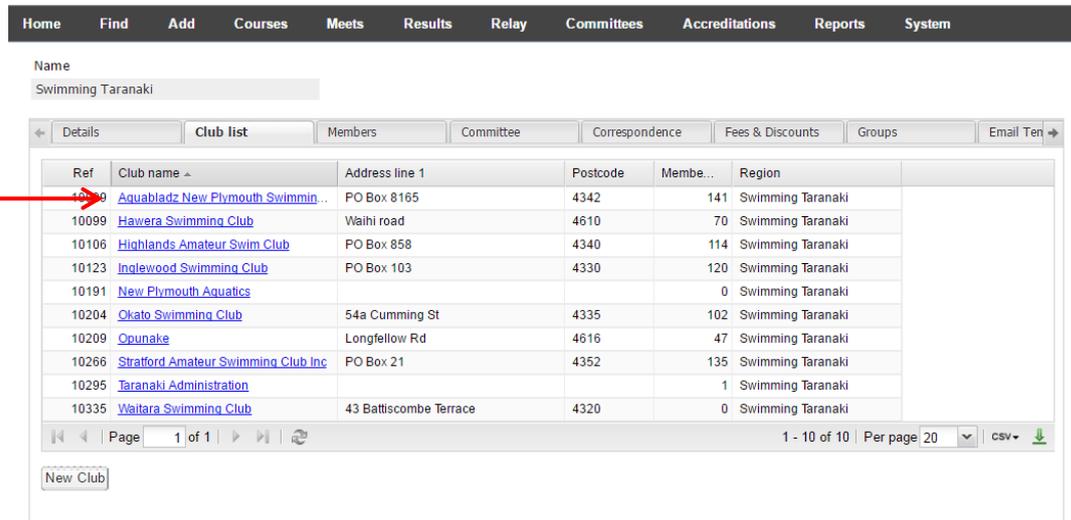
You will then be led to the below screen where you will need to select the 'Club list' tab.



The screenshot shows the website header and navigation menu. Below the navigation menu, the "Name" field contains "Swimming Taranaki". A secondary menu below that includes tabs for Details, Club list, Members, Committee, Correspondence, Fees & Discounts, Groups, and Email Ter. The "Club list" tab is circled in red. The main content area is divided into three sections: "This Region" (Swimming Taranaki (11) with details like Abbreviation TR, Subdomain taranaki, and News Feed), "Address" (Address, Post Code 4330), and "Bank Details" (Account name Swimming Taranaki Inc, BSB Number, Account number, GST Registered). There are "Edit" and "Amend" buttons in the Address and Bank Details sections. A "Contact" section is also visible at the bottom left.

3

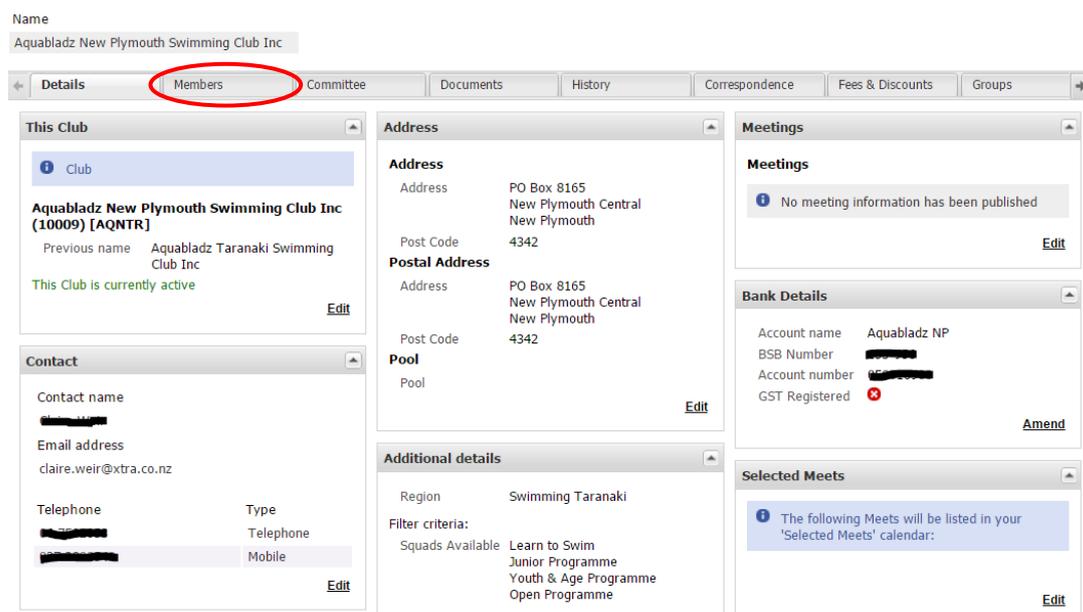
The 'club list' tab will then bring you to the below screen. From here you will to select your club by clicking on its name.



Ref	Club name	Address line 1	Postcode	Membe...	Region
10009	Aquabladz New Plymouth Swimm...	PO Box 8165	4342	141	Swimming Taranaki
10099	Hawera Swimming Club	Waihi road	4610	70	Swimming Taranaki
10106	Highlands Amateur Swim Club	PO Box 858	4340	114	Swimming Taranaki
10123	Inglewood Swimming Club	PO Box 103	4330	120	Swimming Taranaki
10191	New Plymouth Aquatics			0	Swimming Taranaki
10204	Okato Swimming Club	54a Cumming St	4335	102	Swimming Taranaki
10209	Opunake	Longfellow Rd	4616	47	Swimming Taranaki
10266	Stratford Amateur Swimming Club Inc	PO Box 21	4352	135	Swimming Taranaki
10295	Taranaki Administration			1	Swimming Taranaki
10335	Waitara Swimming Club	43 Battiscombe Terrace	4320	0	Swimming Taranaki

4

You will then be led to this page, where you will then need to click on the 'Members' tab.



Name: Aquabladz New Plymouth Swimming Club Inc

Members

This Club

Aquabladz New Plymouth Swimming Club Inc (10009) [AQNTR]

Previous name: Aquabladz Taranaki Swimming Club Inc

This Club is currently active

Contact

Contact name: [REDACTED]

Email address: claire.weir@xtra.co.nz

Telephone: [REDACTED] Type: Telephone

[REDACTED] Type: Mobile

Address

Address: PO Box 8165, New Plymouth Central, New Plymouth

Post Code: 4342

Postal Address

Address: PO Box 8165, New Plymouth Central, New Plymouth

Post Code: 4342

Pool

Pool: [REDACTED]

Additional details

Region: Swimming Taranaki

Filter criteria:

- Squads Available: Learn to Swim, Junior Programme, Youth & Age Programme, Open Programme

Meetings

No meeting information has been published

Bank Details

Account name: Aquabladz NP

BSB Number: [REDACTED]

Account number: [REDACTED]

GST Registered: [REDACTED]

Selected Meets

The following Meets will be listed in your 'Selected Meets' calendar:

5

You will then be given a full list of members. You can alter which members you want to see and download by clicking on the following buttons at the bottom of the page.

- Show all members
- Show approved members
- Show pending members
- Show incomplete members
- Show lapsed members

Member No.	Forenames	Surname	Membership Type	Financial	Status	Approved	Paid by
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Non-Voting Technical Official	Non Paying	Active	Approved	
			Non-Voting Technical Official	Non Paying	Active	Approved	
			Club Swimmer	Non Paying	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Club Swimmer	Non Paying	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Competitive Swimmer	Financial	Active	Approved	
			Non-Voting Technical Official	Non Paying	Active	Approved	

Page 1 of 8 | 1 - 20 of 141 | Per page 20 | csv

[Show all Members](#)
[Show approved Members](#)
[Show pending Members](#)
[Show incomplete Members](#)
[Show lapsed Members](#)

6

To export the members list, hover over the bottom right-hand side of the table, to display the download options as below.



Then select whether you would like to download the members listing as a CSV or XLS file. The download will begin shortly. You can open this spreadsheet in excel and view your members details.

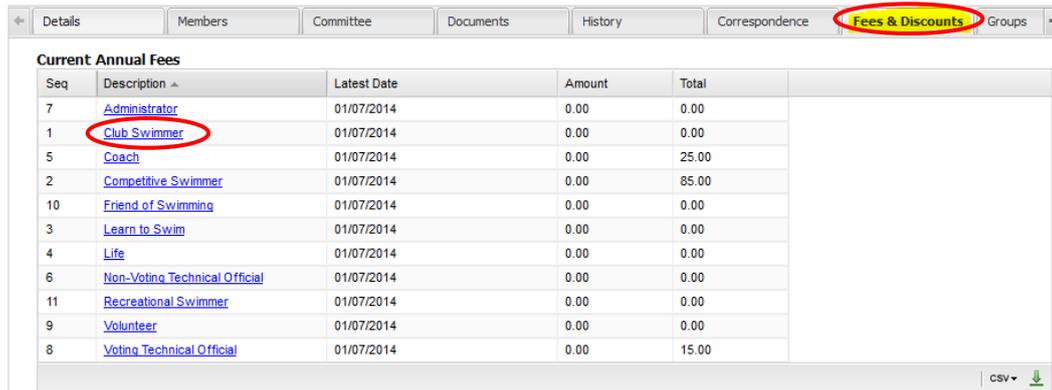


Membership Renewal Process for Clubs.

Set your club membership fees: Before you start the renewal process you must set the membership fees for your different membership type. See the Setting Club Membership Fees in the FINANCE Section

Click on the Fees & Discounts tab in your clubs profile on the database.

1



Seq	Description ^	Latest Date	Amount	Total
7	Administrator	01/07/2014	0.00	0.00
1	Club Swimmer	01/07/2014	0.00	0.00
5	Coach	01/07/2014	0.00	25.00
2	Competitive Swimmer	01/07/2014	0.00	85.00
10	Friend of Swimming	01/07/2014	0.00	0.00
3	Learn to Swim	01/07/2014	0.00	0.00
4	Life	01/07/2014	0.00	0.00
6	Non-Voting Technical Official	01/07/2014	0.00	0.00
11	Recreational Swimmer	01/07/2014	0.00	0.00
9	Volunteer	01/07/2014	0.00	0.00
8	Voting Technical Official	01/07/2014	0.00	15.00

Then click on any of the membership types that you need to add a membership fee against and edit the following:

Annual Fee

* Member type

Description

Region Member type

Valid for joiners

Valid - reinstatement

Obsolete

Annual Subs

Payable After	Club Fees	Other subs	Total
<input type="text" value="01/07/2014"/>	<input type="text" value="65"/>	90.50	155.50
<input type="text" value="dd/mm/yyyy"/>	<input type="text"/>		

1. Click the box for joiner and reinstatement if applicable.
2. Ensure that the payable after date is 01/07/ of the new membership year.
3. Enter in your club fees for that membership type.
4. Click on the recalculate button.
5. Click save at the bottom of the page.

Note: if you have a pro rate payment where it changes throughout the membership year this can be added in this section. Add the start date for the new price to start and create as many of these as you have changes in charges.

2

If a members membership type is changing in the following year you can pre-set what it will change to during the current financial year, to do this you will need to click into the edit button in the subscriptions box on their profile.

Subscriptions	
Type	Competitive Swimmer
Pay Method	Cheque / Cash
Paid By	
Description	Value
Club subscriptions	2.50
Region / National	96.00
Total subscriptions	98.50
Donation amount	
Grand Total	98.50
Subs due today 0.00	
Total due	0.00
Discount	0.00
Discounted Amount	0.00
Manual pay Pay Now Transactions Edit Send Payment Email	

The subscriptions screen will now show up where you can edit a member's membership type. Underneath the type for the current year there is a box "Next Year's Settings (year) – only required if different from previous year). Click into this drop down to reveal an option to select the new membership type for the follow year.

Subscriptions

* Type 2015 Club Swimmer

Pay Method 2015 Cheque / Cash

Next year settings (2016) - only required if different from 2015

⚠ You should only make selections in these fields if they are DIFFERENT from the current year (2015) fields above. The default is to leave them blank, and the system will automatically set the values on renewal to be the same.

Type 2016 Competitive Swimmer

Pay Method 2016 Card Payment

Renewal date 01/07/2016

* Effective date ⓘ 09/06/2016 ⓘ

Paid By ⓘ

Cancel Save



Renew your membership: Once you are happy that all of your membership types are complete and accurate it is time to renew your membership but only do this after the 1st of July

Move to the bottom of the page and click on the "Renewals" button.

3

Current Annual Fees

Seq	Description ^	Latest Date	Amount	Total
7	Administrator	01/07/2014	0.00	0.00
1	Club Swimmer	01/07/2014	0.00	0.00
5	Coach	01/07/2014	0.00	25.00
2	Competitive Swimmer	01/07/2014	0.00	90.50
10	Friend of Swimming	01/07/2014	0.00	0.00
3	Learn to Swim	01/07/2014	0.00	0.00
4	Life	01/07/2014	0.00	0.00
6	Non-Voting Technical Official	01/07/2014	0.00	0.00
11	Recreational Swimmer	01/07/2014	0.00	0.00
9	Volunteer	01/07/2014	0.00	0.00
8	Voting Technical Official	01/07/2014	0.00	15.00

Add

Discount Packages

No Data Available

Add

Obsolete Annual Fees

No Data Available

Calculate Subscriptions

Renewals

Recalculate

Start and End Dates

First Renewal 01/07/2014

Last Renewal 30/06/2015

Cancel

Calculate

Once clicking this you will be asked to confirm the period in which you are renewing for. This will automatically be set to the current membership year. If this is correct click on calculate.

Last Run Details

Started on

Please confirm calculation

Back

Calculate

Click to confirm that you want to renew.

The database will then tell you the number of subscriptions that have been calculated.

Now that all your members have had their financial status changed to “Un-Financial” you can renew their membership in two ways. You can either manually renew their membership, see steps below or the member can do it online themselves. If your club has opted to do membership renewals via the SNZ Online registration system you will be able to send out an email to all club members providing them with a token to complete their online registration. To do this please refer to “Sending a Membership Renewal Email” under the MEMBERSHIP Section.

Update your members Financial Status: You can now access each members profile and update their financial status through the members tab in your clubs profile. For all members that are not renewing their membership please lapse their profile, to do this please refer to “how do I lapse a member” under the membership section.

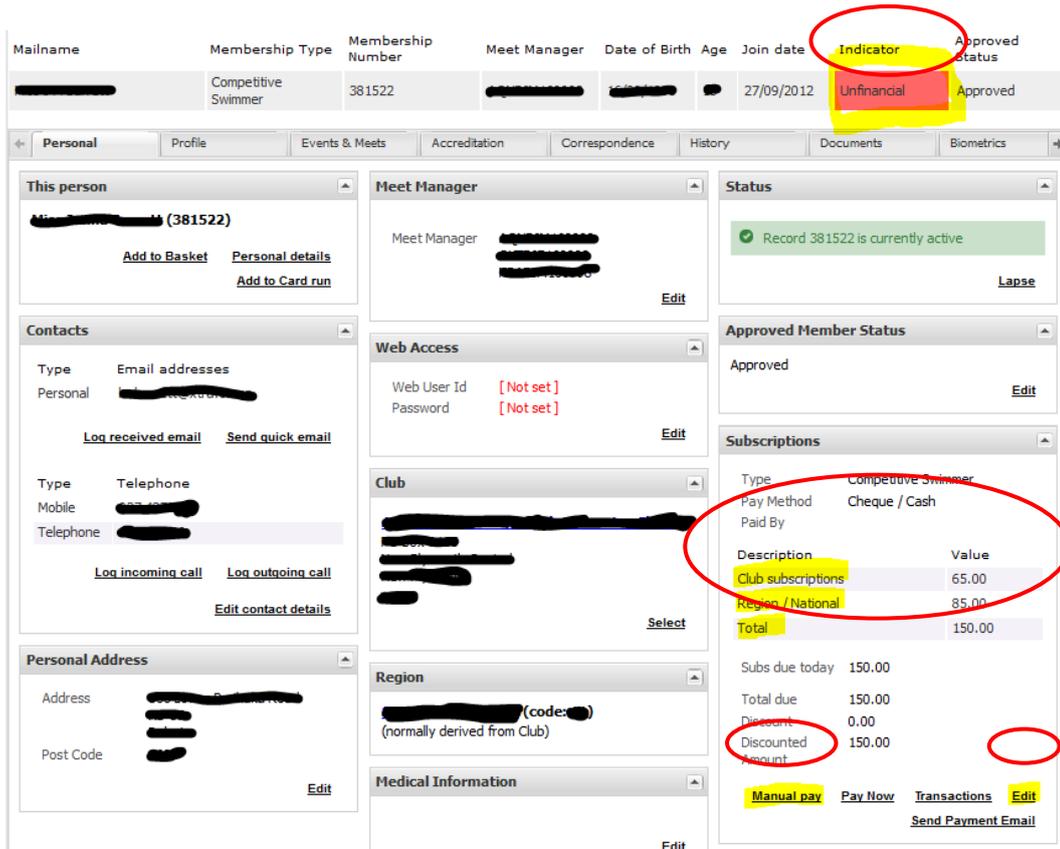
4

In the image below you can see that each member Financial status is now un-financial for all paying membership types.

Member No.	Forenames	Surname	Membership Type	Financial	Status	Approved	Paid by
348151			Competitive Swimmer	Unfinancial	Active	Approved	Self
311161			Competitive Swimmer	Unfinancial	Active	Approved	Self
304101			Administrator	Non Paying	Active	Approved	Self
390140			Competitive Swimmer	Unfinancial	Active	Approved	Self
375985			Competitive Swimmer	Unfinancial	Active	Approved	Self
375986			Competitive Swimmer	Unfinancial	Active	Approved	Self
390129			Competitive Swimmer	Unfinancial	Active	Approved	Self
392067			Competitive Swimmer	Unfinancial	Active	Approved	Self
361682			Competitive Swimmer	Unfinancial	Active	Approved	Self
390143			Competitive Swimmer	Unfinancial	Active	Approved	Self
375987			Competitive Swimmer	Unfinancial	Active	Approved	Self
361687			Competitive Swimmer	Unfinancial	Active	Approved	Self
347838			Competitive Swimmer	Unfinancial	Active	Approved	Self
314149			Competitive Swimmer	Unfinancial	Active	Approved	Self
390146			Competitive Swimmer	Unfinancial	Active	Approved	Self
375990			Competitive Swimmer	Unfinancial	Active	Approved	Self
390148			Competitive Swimmer	Unfinancial	Active	Approved	Self
314152			Competitive Swimmer	Unfinancial	Active	Approved	Self
390150			Competitive Swimmer	Unfinancial	Active	Approved	Self
390151			Competitive Swimmer	Unfinancial	Active	Approved	Self



You can now go into the members profile page by clicking on their membership number next to their name in the membership list. This will show you the members profile as you can see below.



Mailname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
[Redacted]	Competitive Swimmer	381522	[Redacted]	[Redacted]	[Redacted]	27/09/2012	Unfinancial	Approved

Description	Value
Club subscriptions	65.00
Region / National	85.00
Total	150.00

Subs due today	150.00
Total due	150.00
Discount	0.00
Discounted amount	150.00

Things to note in the below image is that the members profile is displaying that they are unfinancial on the status bar, it displayed the different components of the membership fee based on what you have entered for your club and what has come through from the regional and national fees and you have the ability to pay the membership fees to make the member financial.

You can process a manual payment by clicking on the manual pay button.



You will then see this screen:

Subs details

Total subscription amount due: 150.00

*** Payment method** Cheque
 Cash
 Manual C.Card

*** Receipt date**

*** Amount paid now**

Ensure that you select the payment method, the date of receipt and if only a part payment indicate the amount that has been paid.

Note that the member will not become financial until the full amount is paid.

Once you have done this click next.

You will then see the below screen:

Payment confirmation

Please check these details carefully, and use the 'Back' button if you need to change them. A total of 150.00 will be applied to the member's record when you click 'Confirm payment'.

Total owing	This payment	Payment method
150.00	150.00	Cheque

***** Please confirm that the member is paying the full amount owing

By clicking the check box and pressing the record payment button you are confirming that payment has been received and if the full payment has been made the members profile will then be financial.



Opting out of Online Registrations

In the database under each club's profile there is a tick box that allows the club to opt out of online registration if they wish for their members to complete their membership manually. To opt out please follow these steps.

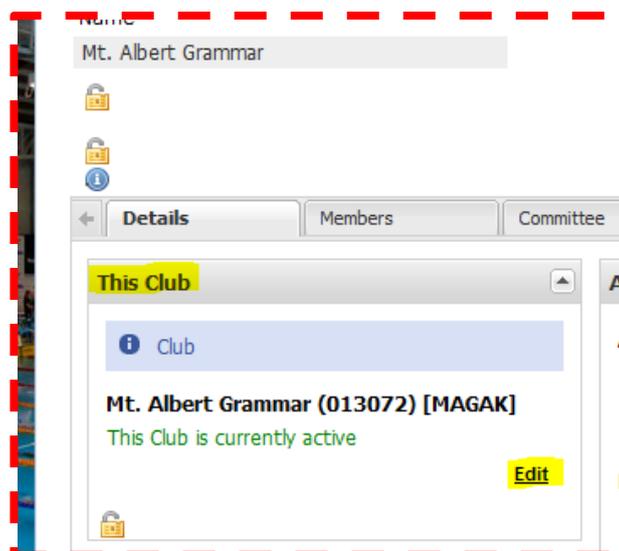
1

Click into the club's profile on the database.



2

Once in the club profile you will see a "This Club" box, click "Edit"



2

The Following page will appear, untick the “Allow Member Join” box and click “Save”

Main Details

Club name

Name	<input type="text" value="Mt. Albert Grammar"/>
Abbreviation	<input type="text" value="MAGAK"/>
Subdomain	<input type="text"/>
* Type	<input type="text" value="Club"/>
Allow Member Join	<input checked="" type="checkbox"/>

You may enter additional alternative names - click here

Additional details

Region	Swimming Auckland
Date Opened	<input type="text" value="18/03/2015"/>
Date Closed	<input type="text" value="dd/mm/yyyy"/>

Cancel Save

Pre-setting a Membership Type for the next Membership Year

1

In the Subscriptions box of the members profile select 'Edit'



Subscriptions

Type Competitive Swimmer
 Pay Method Cheque / Cash
 Paid By

Description	Value
Club subscriptions	59.50
Region / National	105.50
Total subscriptions	165.00
Donation amount	
Grand Total	165.00

Subs due today 0.00
 Total due 0.00
 Discount 0.00
 Discounted Amount

[Manual pay](#) [Pay Now](#) [Transactions](#) [Edit](#)
[Send Payment Email](#)

2

Select the grey drop down box for next year's settings



Subscriptions

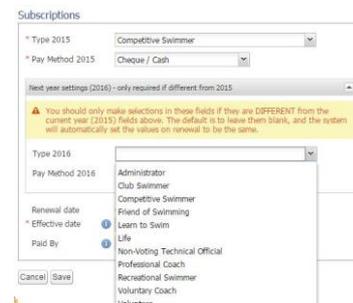
Type 2015 Competitive Swimmer
 Pay Method 2015 Cheque / Cash

Next year settings (2016) - only required if different from 2015

Renewal date 01/07/2016
 Effective date 27/06/2016
 Paid By

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

Select the new years Type your member intends to have (**you do not need to select a pay method*)



Subscriptions

Type 2015 Competitive Swimmer
 Pay Method 2015 Cheque / Cash

Next year settings (2016) - only required if different from 2015

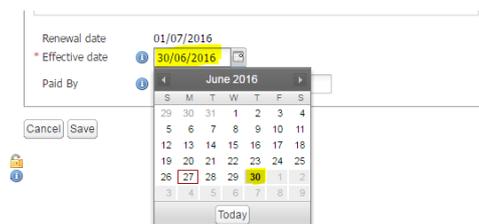
You should only make selections in these fields if they are DIFFERENT from the current year (2015) fields above. The default is to leave them blank, and the system will automatically set the values on renewal to be the same.

Type 2016
 Administrator
 Club Swimmer
 Competitive Swimmer
 Friend of Swimming
 Learn to Swim
 Life
 Non-Voting Technical Official
 Professional Coach
 Recreational Swimmer
 Voluntary Coach

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

3

Ensure that you select the effective date as of 30/06 of the current year.



Renewal date 01/07/2016
 Effective date 30/06/2016
 Paid By

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

June 2016

S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

[Today](#)

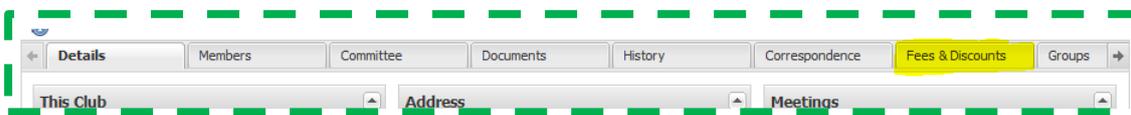
Once you have selected the correct date save this setting and the membership type will automatically update on 01/07/2016.

Sending a Membership Renewal Email

On the 1st of July all members in the database will have their financial status changed to "Un-Financial" as we enter a new membership year. If your club has opted to do membership renewals via the SNZ online registration system you will be able to send out an email to all club members providing them with a token to complete their online registration. To do this follow these steps.

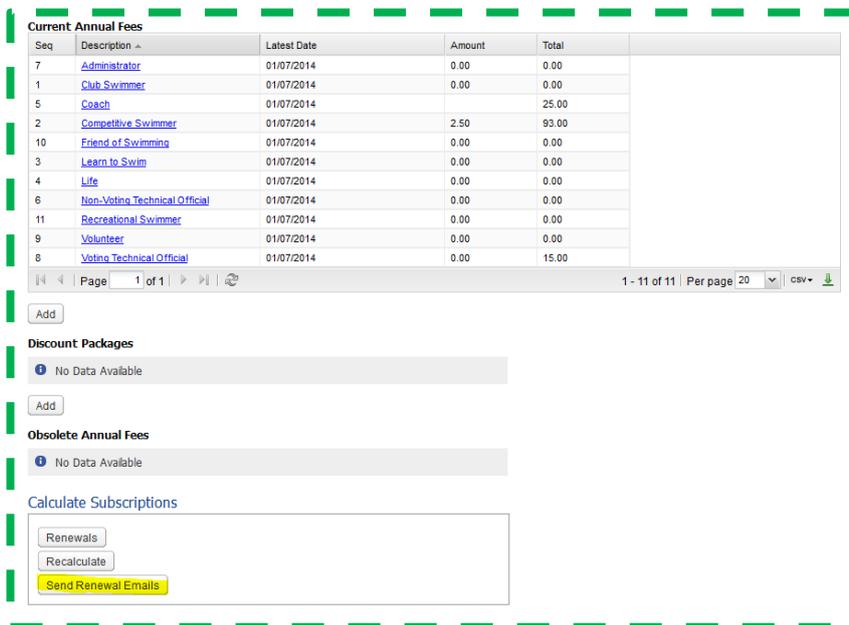
1

Enter your clubs profile page in the SNZ Database. You will see a "Fees and Discounts" tab along the top. Click into this tab.



2

There will be a send "Send Renewal Emails" button at the bottom of this page, click this and then follow the prompts to sending out a renewal email.



The screenshot shows a table titled "Current Annual Fees" with the following data:

Seq	Description ^	Latest Date	Amount	Total
7	Administrator	01/07/2014	0.00	0.00
1	Club Swimmer	01/07/2014	0.00	0.00
5	Coach	01/07/2014		25.00
2	Competitive Swimmer	01/07/2014	2.50	93.00
10	Friend of Swimming	01/07/2014	0.00	0.00
3	Learn to Swim	01/07/2014	0.00	0.00
4	Life	01/07/2014	0.00	0.00
6	Non-Voting Technical Official	01/07/2014	0.00	0.00
11	Recreational Swimmer	01/07/2014	0.00	0.00
9	Volunteer	01/07/2014	0.00	0.00
8	Voting Technical Official	01/07/2014	0.00	15.00

Below the table, there are sections for "Discount Packages" (No Data Available), "Obsolete Annual Fees" (No Data Available), and "Calculate Subscriptions" with buttons for "Renewals", "Recalculate", and "Send Renewal Emails" (highlighted in yellow).

The email will only be sent to members who have an email address against their profile in the database and members that are "Active" and have a fee due. If a member who is lapsed wants to re-join the club, the club will need to re-instate them as "Active" in the database before they can receive a renewal email.

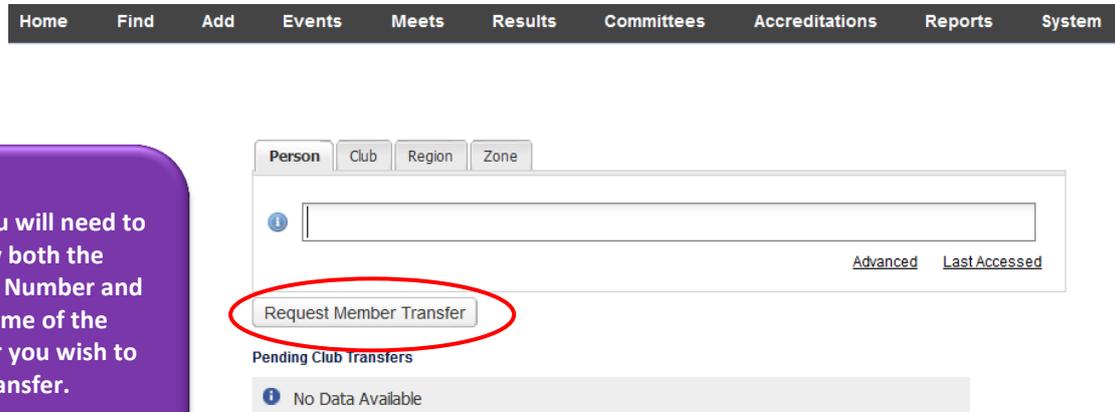
How do I request a transfer to my club?

1

First, you must be logged in under a Regional or Club Administrator role to be able to complete this action.

2

Select the Members Transfer button.



Home Find Add Events Meets Results Committees Accreditations Reports System

Person Club Region Zone

[Advanced](#) [Last Accessed](#)

Request Member Transfer

Pending Club Transfers

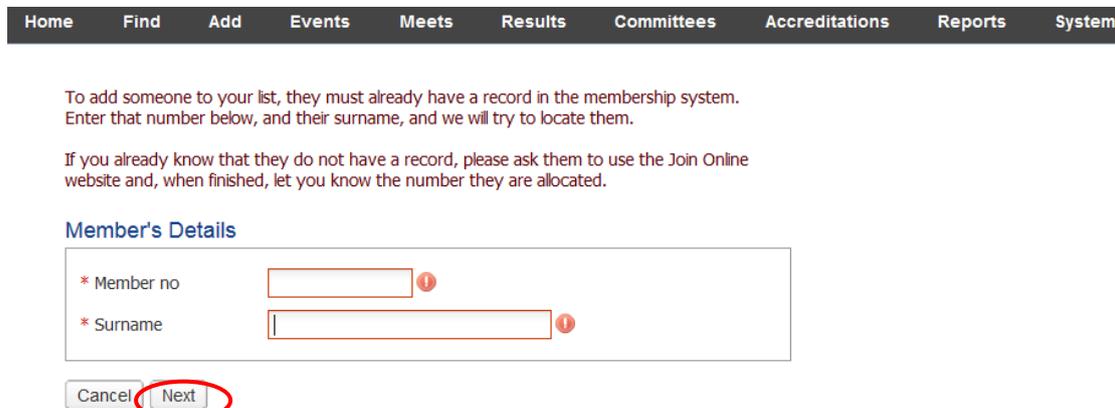
No Data Available

Note: You will need to know both the Member Number and Surname of the member you wish to transfer.

If the member does not know their Member Number, they will need to contact their Regional Administrator.

3

Enter the members Member Number and Surname, click Next.



Home Find Add Events Meets Results Committees Accreditations Reports System

To add someone to your list, they must already have a record in the membership system. Enter that number below, and their surname, and we will try to locate them.

If you already know that they do not have a record, please ask them to use the Join Online website and, when finished, let you know the number they are allocated.

Member's Details

* Member no

* Surname

Cancel **Next**

4

The Member's Details will appear, keep the Status as Approve Request, then Save.

If the member does not exist a warning message will appear.

Home Find Add Events Meets Results Committees Accreditations Reports System

Member's Details

Member	3
Name	M [REDACTED]
DOB	1 [REDACTED]
Requested by	944856 Mrs B Erkens
Date	28/05/2014
Time	15:57:49

Current Club

Club	Wharenui Swim Club
Status	Approved

New Club

* Club	[REDACTED]
Status	Pending

Back Save

Any member that is linked to another member will not be able to transfer until they are unlinked from their family member.

5

Select the Subscription Type you wish the member to have when transferred, then Save.

Home Find Add Events Meets Results Committees Accreditations Reports System

New Subscription

[REDACTED]

Back Save

Home Find Add Events Meets Results Committees Accreditations Reports System

✓ The details have been updated

Return

6

The pending transfer will now sit on the main login screen.

Person Club Region Zone

[REDACTED]

Advanced Last Accessed

Request Member Transfer

Pending Club Transfers

Name	From	Status	To	Status
Miss M [REDACTED]	Wharenui Swim Club	Approved	Selwyn Swim Club	Pending

CSV

How do I approve a member transfer?

If a member has requested a transfer to your club you will receive an email saying "You have a pending transfer".

1

Person Club School Region Zone

Advanced Last Accessed

Request Member Transfer

Pending Club Transfers

Name	From (Club / Region)	Status	To (Club / Region)	Status
[Redacted]	Waterhole Swimming / Swimming Auckland	C: Approved R: Approved	Kings Swim Club / Swimming Auckland	C: Approved R: Pending
[Redacted]	Waterhole Swimming / Swimming Auckland	C: Pending R: Pending	Mt Eden Swimming / Swimming Auckland	C: Approved R: Pending

Page 1 of 1 1 - 2 of 2 Per page 10 csv

Any pending transfers will appear underneath the search functionality.

Or you can find it in the clubs Members tab and by clicking on the **Show pending Members** button.

Details Members Committee History Correspondence Fees & Discounts Groups Email Term

Active Members

Member No.	Forenames	Surname	Membership Type	Status	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Administrator	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved

Page 1 of 5 1 - 20 of 93 Per page 20 csv

Show all Members Show approved Members **Show pending Members** Show incomplete Members Show lapsed Members

2

Select the Approved status in the Pending Club Transfers section and untick the box then Save.

Details Members Committee History Correspondence Fees & Discounts Groups Email Term

Pending Members

Member No.	Forenames	Surname	Membership Type	Status	Approved
944881	Gdfsdfs	Zdfdf	Club Swimmer	Active	<input checked="" type="checkbox"/> Pending

csv

Show all Members Show active Members Show approved Members Show incomplete Members Show lapsed Members

Approved Member Status

Pending Approval

Approval pending

Cancel Save



3

Or click into the Member's profile (by clicking on the Member No.)...

Member No.	Forenames	Surname ▲	Membership Type	Status	Approved
944881	Gdfsdfs	Zdff	Club Swimmer	Active	Pending

[Show all Members](#)
[Show active Members](#)
[Show approved Members](#)
[Show incomplete Members](#)
[Show lapsed Members](#)

On the Personal tab, select Edit on the Approved Member Status section.

Personal	Profile	Events & Meets	Accreditation	Correspondence	History	Biometrics						
<p>This person</p> <p>Mr Gdfsdfs Zdff (944881)</p> <p>Add to Basket Personal details</p> <p>Remove from Card run</p>	<p>Web Access</p> <p>Web User Id [Not set]</p> <p>Password [Not set]</p> <p>Edit</p>	<p>Status</p> <p>Record 944881 is currently active</p> <p>Lapse</p>	<p>Contacts</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Email addresses</th> </tr> </thead> <tbody> <tr> <td>Personal</td> <td>test1@test.com</td> </tr> <tr> <td>Work</td> <td>test1@test.com.au</td> </tr> </tbody> </table>	Type	Email addresses	Personal	test1@test.com	Work	test1@test.com.au	<p>Club</p> <p>Jasi Swim Club</p> <p>PO Box 29 064 Christchurch 8540</p> <p>Select</p>	<p>Approved Member Status</p> <p>Pending Edit</p>	<p>Subscriptions</p>
Type	Email addresses											
Personal	test1@test.com											
Work	test1@test.com.au											

Untick the Approval pending box then click on Save.

Approved Member Status

Pending Approval

Approval pending

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

4

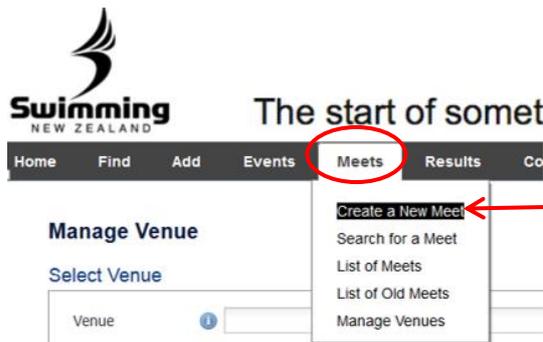
You will receive the following confirmation message.

✓ The details have been updated.

How do I set up a meet?

1

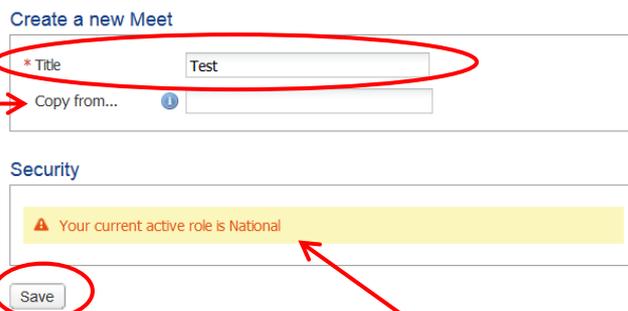
Click the Meets tab and select Create A New Meet



2

The Create A New Meet page will display. Type the title of your meet and select Save.

If you have existing meets in the system, and the meet you are creating has the exact same Meet Manager set up, you can copy a previous meet by typing the name of the meet in the Copy from... text box.



The screenshot shows the 'Create a new Meet' form. The 'Title' field is circled in red and contains the text 'Test'. Below it is the 'Copy from...' field. The 'Security' section is highlighted in yellow and contains the message 'Your current active role is National'. A red arrow points to the 'Save' button at the bottom left of the form.

The security box will display which role you are currently logged in as, in order to ensure you are creating a meet in your correct portal (for administrators who have hold both regional and club committee roles).

3

Complete each of the fields on the Main Details screen.

Main details

* Title

Dates

* Meet Date From

* Meet Date To

Entry Start Date

Entry Start Time

Entry End Date

Entry End Time

Time Zone

Venue

Venue

Meet Contact

Organiser

Organiser's email

Save

Main Details screen fields explained:

- Title: Auto-populated from text entered into Create A New Meet screen
- Meet Date From: First day of the meet
- Meet Date To: Last day of the meet
- Entry Start Date: Date that online entries will automatically open
- Entry Start Time: Exact time that online entries will automatically open
- Entry End Date: Date that online entries will become unavailable
- Entry End Time: Exact time that online entries will become unavailable
- Venue: Venue must be selected from a list of pre-set up venues.
- Organiser: Event Organisers Name
- Organiser's email: Event Organisers email

Once all fields have been completed, select Save.



4

You will receive the following confirmation screen upon completion. If you are accepting online entries for this meet, select the View button.

Meet created...

The Meet 'Test' (code = 000247) has been created...

You may now continue to view this new Meet and add or edit various details by clicking the button below.

If you choose not to do so now, you can find the Meet later from the 'Search...' option on the Meets menu, then click 'Manage'.

[View Event](#)

5

You will be taken to the below screen.

Meet	From	To	Venue
Test	22/05/2014	22/05/2014	

[Details](#) [Settings](#) [Meet Manager](#) [Competitors](#) [Fees](#) [Web display](#) [Competitive Events](#) [Notes](#) [Open To](#) [T and C's](#)

Main details

Event Code	000247
Title	Test
Course	

Venue

Specific venue

Dates

From Date	22/05/2014
To Date	22/05/2014
Entry Start Date	
Entry Start Time	
Entry End Date	
Entry End Time	
Time Zone	
Show in web calendar	Yes
Allow web booking	

Contact

Organiser	Becki
Organiser's email	tech@swimmingnz.org.nz

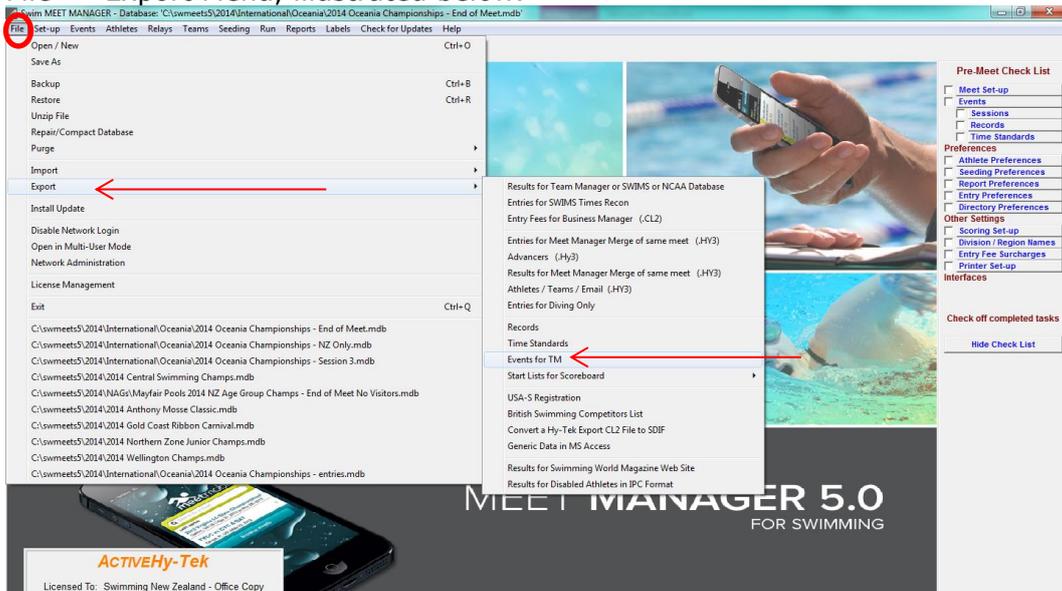
[Cancel](#) [Edit](#)

Click edit and complete all available sections.

5

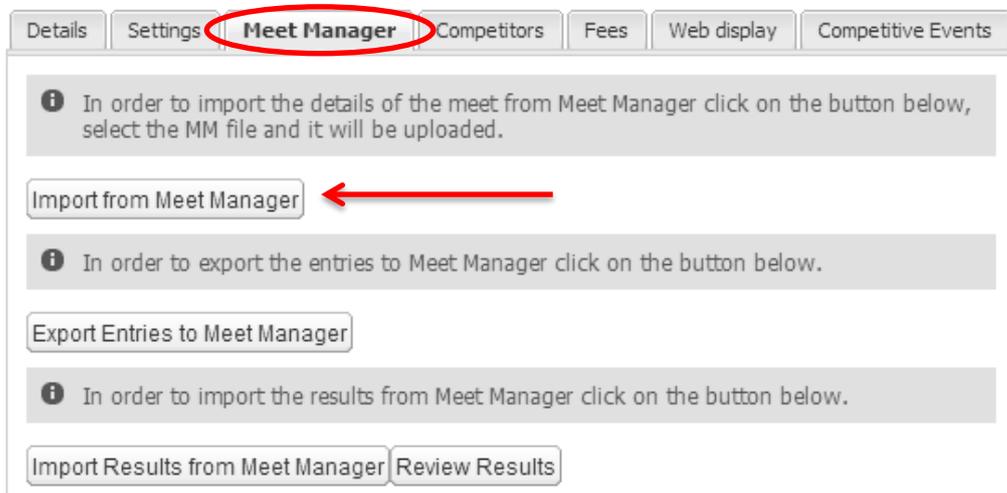
Once you have finished editing the details section of the meet you will now need to upload your events file from Meet Manager. The follow steps will help you to export the files from meet manager and to upload them to the database.

In Meet Manager, export your events using 'Events for TM' process under the File -> Export Menu, illustrated below.



6

Click the meet manager tab in the meet and the select 'Import from Meet Manager button'.



7

You can import the Meet Manger Events file (.zip) using two different methods:

- a) Select the Add File button and then locate the file on your computer.
- b) Locate the Meet Evens Zip file on your computer and drag it into the Drag Files Here box.

Here box.

Upload Swimming Event

Select Meet File
Add file to the upload queue and click the start button.

Filename
Drag files here. ←

+ Add File
 Start Upload

Meet File Name :
 Meet Name :
 Meet Start Date :
 Meet Facility :
 Meet Course :
 Meet Event Count :

* Please ensure this is the correct file

8

You will receive confirmation that the upload was successful. The confirmation screen also shows you the details of the meet that you have just uploaded. After reviewing these details, ensuring all are correct, tick the 'Please ensure this is the correct file' box and select submit.

Upload Swimming Event

+ Upload of "Meet Events-2012 McDonald-s Qld Swimming Championships-15Dec2012-001.zip" successful +

Filename	Status	Size
Meet Events-2012 McDonald-s Qld Swimming Championships-15Dec2012-001.zip	100%	5 KB +

+ Add File
 Start Upload
100% 5 KB

Meet File Name : Meet Events-2012 McDonald-s Qld Swimming Championships-15Dec2012-001.zip
 Meet Name : 2012 McDonald's Qld Swimming Championships
 Meet Start Date : 15/12/2012
 Meet Facility : Brisbane Aquatic Centre
 Meet Course : Long Course
 Meet Event Count : 194

* Please ensure this is the correct file ←

Select the Competitive Events tab to review the Meet Events you have just uploaded. By clicking on the gender of the event you can make changes to the event including changing the title, the date, the qualifying times and the entry fee.

Number	Gender	Age From	Age To	Stroke	Distance	Relay	Type
1	Men	0	109	Butterfly	50 metre		
2	Women	0	109	Butterfly	50 metre		
3	Men	9	99	Backstroke	50 metre		
4	Women	9	99	Backstroke	50 metre		
5	Boys	11	11	Freestyle	50 metre		
6	Girls	11	11	Freestyle	50 metre		
7	Boys	12	12	Backstroke	50 metre		
8	Girls	12	12	Backstroke	50 metre		
9	Boys	13	13	Butterfly	50 metre		
10	Girls	13	13	Butterfly	50 metre		
11	Boys	16	16	Freestyle	50 metre		
12	Girls	16	16	Freestyle	50 metre		
13	Boys	17	18	Backstroke	50 metre		
14	Girls	17	18	Backstroke	50 metre		
15	Men	9	99	Freestyle	50 metre		
16	Women	9	99	Freestyle	50 metre		
17	Boys	11	11	Backstroke	50 metre		
18	Girls	11	11	Backstroke	50 metre		
19	Boys	12	12	Freestyle	50 metre		
20	Girls	12	12	Freestyle	50 metre		

Individual Event

Main details

Sub-event code: 1-1A
 * Title: Men, 13 Year Olds, 200 FREE

Timings

Date: 03/10/2016

Criteria

Gender: Men
 Stroke: Freestyle
 Distance: 200 metre
 Type: Standard
 Qualifying time: Faster than / Slower than
 Short: 2:15.10
 Long: 2:15.10
 Minimum age: 13
 Maximum age: 13
 Relay?:
 Relay Legs:

Miscellaneous

Allow web booking:

Fee

Fee: 22.5



Now that you have imported the meets events you will need to check that the qualifications parameters are correct, to do this you will need to click into the "Settings" tab.

Meet	From	To
2016 NZ Short Course Championships	02/10/2016	06/10/

You will now see a page that looks like the one below that will click on edit down the bottom of the page.

Competition Parameters

School event
 Meet status
 Auto approved No
 Result status Not Approved
 Timing type

Qualifications Parameters

Qualifications Since 01/07/2015
 Qualifications Cut off 20/09/2016
 Age up date 02/10/2016
 Qualification type Short Course - Allow LC Converted, Entry unconverted
 Exclude Splits
 Timing allowed All
 Meet status allowed All
 Result status allowed All

Member Transfer

Transfer Window

Maximum Events

Limit per Entry 0

Volunteers / Technical Officials

Invite volunteer
 TO Nominee info Applications close 5pm Monday 16th May 2016.
 If you have any questions please contact
 events@swimmingnz.org.nz

Position	Qty	Accreditation Required	Level
Referee National	100	Yes	National
Starter National	100	Yes	National
Inspector of Turns Regional	100	Yes	Region
Timekeeper Regional	100	No	
Inspector of Turns National	100	Yes	National

Competition Parameters: In this box you will need to mark if the meet is a school meet such as "Tasman Secondary School Championships" this will ensure that when swimmers enter their secondary club or school will be used as their team.

You will also notice that the "Auto Approved" and "Result Status" sections cannot be changed, these can only be changed by Swimming New Zealand once the Meet Approval Process has been followed.

Qualification Parameters: This section outlines what times a swimmer can use as qualifying times to enter the meet. Qualifications Since and Qualifications Cut off is the period where times achieved in this period can be used as qualifying. Qualification type determines what types of times can be used, this is an important part in setting up the meet. For descriptions on each of the options have a look at the Qualifying Rules Guide under the MEETS section.

Volunteers/Technical Officials: This section when set up correctly will allow technical officials to apply for positions to officiate at meets. To set this up please refer to "How to set up technical official applications" in the MEETS section.

There are also a number of other useful tabs within the meet set up including Web Display, Open To, T and C's, Documents.

Web Display: This tab allows you to add text to the pop-up window that appears when people click onto the meet in a website calendar. This is where meet flyers, contact information should be recorded so swimmers have access to this information before entering.

Open To: This tab allows you to restrict who can enter the meet, you can restrict it by Zone, Region or Club. For example if it was a club championship and you only wanted swimmers from your club entering then you would enter your clubs name into the "Open to Club" section which will restrict entry to only your club members.

T and C's: This tab allows you to add Terms and Conditions to the meet that swimmers have to accept to enter. Click the edit button and add your terms and conditions. Once you have saved this a prompt will appear before swimmers can choose their events asking them to accept the terms and conditions of the meet by clicking on a tick box.



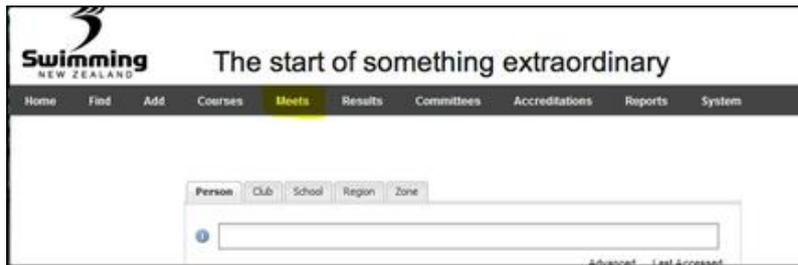
Documents: The documents tab is a place where you can store any documents relevant to the meet. This section is only available to be seen by administrators who log into the database, this section cannot be seen by swimmers using their MyPage to enter a meet.



Entering swimmers into a Meets as a Club Administrator

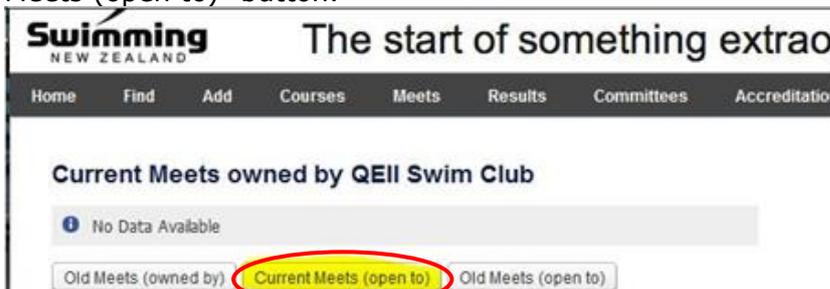
1

After Logging into the database, hover over the "Meets" tab, this should bring up a number of different options including "List of Meets", click into this.



2

Once in here you will have the option to see your current meets, your old meets and also meets that are owned by other clubs, regions and SNZ if they have been set to being open to your club. For entry into a national meet click on the "Current Meets (open to)" button.



3

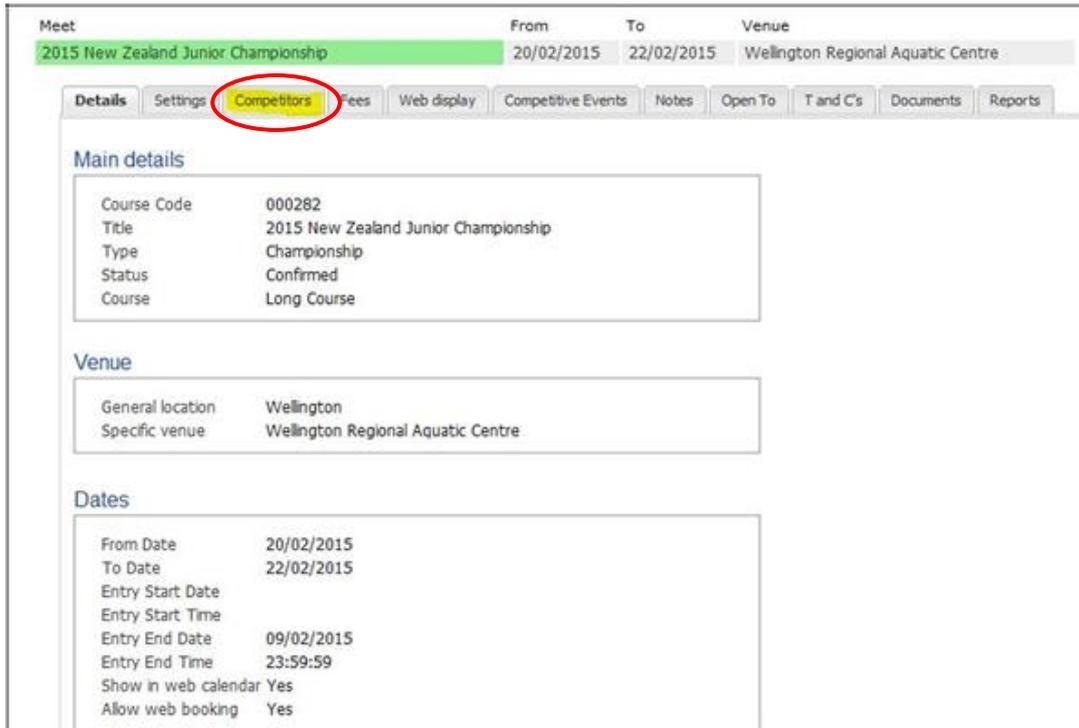
This will then bring up a list of meets that you can enter swimmers into from your club, select the meet you want by clicking on its name

Meet Title - click to view	Start date	Days	Venue	Owned by	Show?	Book?
2015 Victorian Open Championships	16/01/2015	3	Melbourne Sports and Aquatic Centre	Open/National	Y	N
2015 NSW 10 Years & Under - 17 Years State Age Cham ..	16/01/2015	1	Sydney Olympic Park Aquatic Centre	Open/National	Y	N
Swimming Wellington 2015 LC Summer Champs	16/01/2015	4	Wellington Regional Aquatic Centre	Swimming Wellington	Y	N
2015 NSW 13-18 Years State Age Championships	19/01/2015	6	Sydney Olympic Park Aquatic Centre	Open/National	Y	N
Swim BOP Lons Course Champs	24/01/2015	1	Rotorua Aquatic Centre	Swimming Bay of Plenty	Y	N
Swim Rotorua Lons Course	24/01/2015	1	Rotorua Aquatic Centre	Swim Rotorua	Y	N
SNM Age Groups 2015 - Lons Distance Events	31/01/2015	1	Stadium 2000 Blenheim	Swimming Nelson Marlbor...	Y	Y
Signature 2 Upper Hutt Meet 2015	31/01/2015	1	Wellington Regional Aquatic Centre	Swimming Wellington	Y	Y
BSC Summer Meet	31/01/2015	1	Stadium 2000	Blenheim Swimming Club	Y	N
SNM Age Group Championships 2015	07/02/2015	1	Nayland Pool	Swimming Nelson Marlbor...	Y	Y
Bream Bay Northcoast Carnival	07/02/2015	1		Bream Bay Swim Club	Y	Y
2015 Zonal Championships	08/02/2015	1	Westwave Aquatic Centre	Open/National	Y	N
Swim BOP Raina Stars	08/02/2015	1		Swimming Bay of Plenty	Y	N
Dive Right In	15/02/2015	1	Stadium 2000	Blenheim Swimming Club	Y	N
2015 New Zealand Junior Championships	20/02/2015	3	Wellington Regional Aquatic Centre	Open/National	Y	Y
2015 NSW State Open Championships	27/02/2015	3	Sydney Olympic Park Aquatic Centre	Open/National	Y	Y
SW Qualifier Meet	07/03/2015	1	Wellington Regional Aquatic Centre	Swimming Wellington	Y	N
Swim BOP Blyths	08/03/2015	1	Rotorua Aquatic Centre	Swimming Bay of Plenty	Y	N
BSC Autumn Meet	14/03/2015	1	Stadium 2000	Blenheim Swimming Club	Y	N
Metro League 1 2015	15/03/2015	1		Swimming Wellington	Y	N



4

Once you have clicked on the meet it will take you to the meet page with various pieces of information about the meet. All information will be locked to administrators other than the owner of the meet. To enter swimmers into the meet click on the "Competitors" tab.



The screenshot shows a web interface for a meet. At the top, there is a header with the following information:

Meet	From	To	Venue
2015 New Zealand Junior Championship	20/02/2015	22/02/2015	Wellington Regional Aquatic Centre

Below the header is a navigation bar with several tabs: Details, Settings, **Competitors** (highlighted with a red circle), Fees, Web display, Competitive Events, Notes, Open To, T and C's, Documents, and Reports.

The main content area is divided into three sections:

- Main details:**

Course Code	000282
Title	2015 New Zealand Junior Championship
Type	Championship
Status	Confirmed
Course	Long Course
- Venue:**

General location	Wellington
Specific venue	Wellington Regional Aquatic Centre
- Dates:**

From Date	20/02/2015
To Date	22/02/2015
Entry Start Date	
Entry Start Time	
Entry End Date	09/02/2015
Entry End Time	23:59:59
Show in web calendar	Yes
Allow web booking	Yes

5

Once you have clicked on the competitors tab the following page will appear asking you to enter an individual or enter a relay. This page will also display what swimmers are entered into the meet from your club. Click on the "Enter Individual" button.



The screenshot shows the same web interface as above, but with the "Competitors" tab selected. The main content area displays the following information:

There are no Competitors to display

Enter Individual (highlighted with a red circle)

Cancellations

There are no cancellations to display

Enter Relay

6

Once you have clicked on "Enter Individual" a box will appear asking you to enter the swimmers name, once you have done this click the "Book" button

Meet	From	To	Venue
2015 New Zealand Junior Championship	20/02/2015	22/02/2015	Wellington Regional Aquatic Centre

Select Swimmer to enter

* Member

7

Events you qualify for				
Event Number	Event	Your best time	Qualifying Time	Type
72-72	Boys, 11 Year Olds, 100 Breaststroke	1:33.42 (C)	Below 1:36.50 (S)	Standard
6-6	Boys, 11 Year Olds, 50 Breaststroke	43.38 (C)	Below 44.65 (S)	Standard

Events you do not qualify for				
Event Number	Event	Your best time	Qualifying time	Type
2-2	Boys, 12 & Under, 400 Freestyle		Below 5:25.00 (L)	Standard
12-12	Boys, 11 Year Olds, 200 Backstroke		Below 3:00.29 (L)	Standard
18-18	Boys, 11 Year Olds, 100 Butterfly		Below 1:28.10 (L)	Standard
24-24	Boys, 12 & Under, 400 IM		Below 6:11.20 (L)	Standard
28-28	Boys, 11 Year Olds, 50 Freestyle		Below 32.73 (L)	Standard
34-34	Boys, 11 Year Olds, 200 Breaststroke	3:32.14	Below 3:28.50 (L)	Standard
40-40	Boys, 11 Year Olds, 50 Backstroke		Below 39.60 (L)	Standard
46-46	Boys, 11 Year Olds, 200 Freestyle		Below 2:39.11 (L)	Standard
52-52	Boys, 11 Year Olds, 50 Butterfly		Below 39.10 (L)	Standard
58-58	Boys, 11 Year Olds, 100 Backstroke		Below 1:24.25 (L)	Standard
66-66	Boys, 11 Year Olds, 200 IM		Below 3:02.70 (L)	Standard
78-78	Boys, 11 Year Olds, 100 Freestyle		Below 1:12.71 (L)	Standard
82-82	Boys, 12 & Under, 200 Butterfly		Below 3:07.20 (L)	Standard

This will then bring up a page of events that the swimmer has and has not qualified for. To enter them into an event they qualify for click on the drop down next to that event and click yes. Please note that the number next to the "Yes" is the price of entry into that meet. Once you have selected all the events that you want to enter the swimmer in click proceed down the bottom of the page



8

A "Booking Details" page will then appear. This shows a summary of what events the swimmer has been entered in and the total cost to pay. You have two options in terms of paying, that is either pay now or pay later. If you choose pay now you will have to pay by credit card if you choose pay later we will send an invoice out to your club. To choose either of these options click on the drop down.

Once your option has been chosen click the proceed to payment button.

Booking details

⚠ Please check these details carefully, and use the 'Back' button if you need to change them. The total fee due is 36.05 - please select your preferred option below and click 'Continue'.

Pay Now (card payment on the next page) ▼

Event	Fee
72 Boys, 11 Year Olds, 100 Breaststroke	17.50
6 Boys, 11 Year Olds, 50 Breaststroke	17.50

Mail name
[REDACTED]

i The information below shows how the total fee of 36.05 is calculated.

Meet fee	0.00
Events fee(s)	35.00
Surcharge	1.05
Total to pay	36.05

Back
Proceed to Payment

9

i Please enter your credit or debit card details to complete the payment. The name and address given must match those on the card statement.

Card details

⚠ Amount to pay: 36.05

* Card name

* Card number

* Card type

Issue

Valid from

* Expiry date

* Security code

* Address

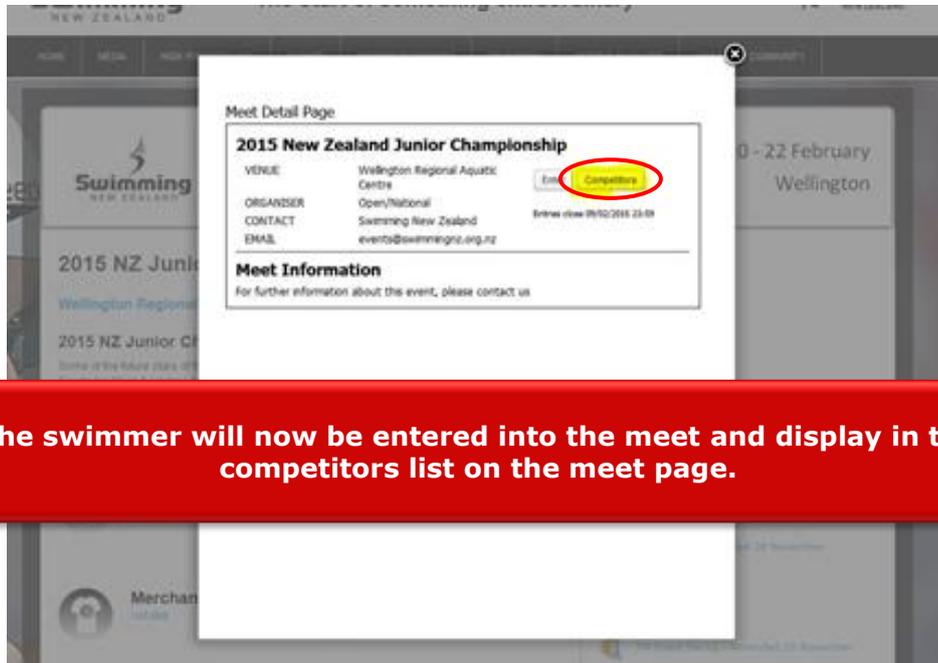
Suburb

* City

* Postcode

Back
Continue

Once you have clicked proceed to payment, if you are paying now by credit card the following page will appear where you can enter your credit card details. Once you have done this and clicked continue and the payment has been accepted the swimmer will be successfully entered in the meet.



The swimmer will now be entered into the meet and display in the competitors list on the meet page.

10

You can cancel a swimmers entry to a meet to do this you will see a “cancel” button next to the swimmers name in the competitors list on the database. Clicking on this button will take you to a screen asking for the reason the entries are being cancelled. Once you have selected the reason, click “save”, finalising the cancellation process.

All Competitors

Member	Mail name	Club	Amend	Cancel	Balance	Paid	Volunteer
947469	Mr G W Adam	North Canterbury Swim Club Inc	Amend	Cancel	105.00	Pay 0.00	
947925	Miss T L McKelvie	Greendale Swim Club	Amend	Cancel	70.00	Pay 0.00	
315053	Miss T K Clement	North Shore Swimming Club	Amend	Cancel	17.50	Pay 0.00	
384993	Miss A B Noble	Karori Pirates Swimming Club	Amend	Cancel	87.50	Pay 0.00	
351384	Mr J R Reynolds	Fairfield Swimming Club	Amend	Cancel	70.00	Pay 0.00	
384389	Mr T S Solouots	Howick Pakuranga	Amend	Cancel	140.00	Pay 0.00	
319156	Miss M E Fisher MNZM	Tawa Swimming Club	Amend	Cancel	87.50	Pay 0.00	
374893	Miss Y C Ruth	OEH Swim Club	Amend	Cancel	122.50	Pay 0.00	
314020	Miss Y Z Lee	North Shore Swimming Club	Amend	Cancel	247.50	Pay 0.00	
314212	Miss R A Dubber	North Shore Swimming Club	Amend	Cancel	52.50	Pay 0.00	

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Cancel Delegate Booking

Event: 2016 NZ Short Course Championships
 Member: 314020
 Mail Name: Miss Y Z Lee
 Status: Standard
 Type: Standard

* Cancel code:

Cancel Save

Cancelled
 Web sale
 Entered in Error
 Transferred

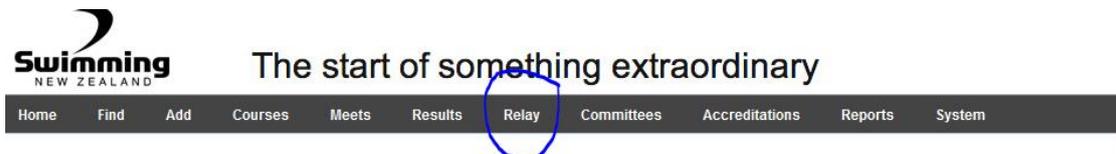
Entering Relays

1

When entering relays you will need to be logged in as the club/regional administrator of the team you are doing entries for. A regional administrator can't do relay entries for a club team and vice versa.

2

Along the top menu of the database there is a "Relay" tab, hover over this and click on "Manage"



3

Select the meet you want to enter a relay team in by clicking the "Meet Code".

Meets with Relays

Meet Code	Meet Title - click to view	Start date	Owned by	Venue
000388	2015 Swim Rotorua SC Meet	02/08/2015	Swim Rotorua	Rotorua Aquatic Centre
000748	2015 New Zealand Short Course Championships	11/08/2015	Open/National	AUT Millenium Institute of Sport and ...
000749	2015 NZ Secondary School Swimming Championships	11/09/2015	Open/National	Waterworld Te Rapa
000755	2015 Commonwealth Youth Games	07/09/2015	Open/National	Tuanaimato Sports Complex
000912	Swim Timaru Winter Meet	01/08/2015	Swimming Canterbury We...	
000918	HBPB Winter Championships	28/08/2015	Swimming Hawkes Bay Po...	
000950	2015 NZCT AIMS GAMES	07/09/2015	Open/National	Baywave TECT Aquatic Centre
000964	2015 Southland Winter Meet #2	25/07/2015	Swimming Southland	Splash Palace
000991	2015 Western Australia State Open & Age Championships	10/09/2015	Open/National	HBF Stadium
001079	2015 Club Ribbon Night Term 3	24/08/2015	Neptune ASC	

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4

Select the event you want to enter by clicking on the "Event Number" and then clicking "Add Team"

Meet: (000748) 2015 New Zealand Short Course Championships

Relay Events for this Meet

Event	Description	Age From	Age To	Gender
8-8	Women, 16 & Over, 4X400 Freestyle Relay	16	109	Women
9-9	Men, 16 & Over, 4X400 Freestyle Relay	16	109	Men
10-10	Women, 15 & Under, 4X400 Freestyle Relay	0	15	Women
11-11	Men, 15 & Under, 4X400 Freestyle Relay	0	15	Men
26-26	Women, 16 & Over, 4X800 Freestyle Relay	16	109	Women
27-27	Men, 16 & Over, 4X800 Freestyle Relay	16	109	Men
28-28	Women, 15 & Under, 4X800 Freestyle Relay	0	15	Women
29-29	Men, 15 & Under, 4X800 Freestyle Relay	0	15	Men
43-43	Women, 16 & Over, 4X400 M Relay	16	109	Women
44-44	Men, 16 & Over, 4X400 M Relay	16	109	Men

Page 1 of 2 | 1 - 10 of 10 | Per page 10 | csv

Relay Teams for Event

Meet (000748) 2015 New Zealand Short Course Championships
Event (8-8) Women, 16 & Over, 4X400 Freestyle Relay

Teams will be created at Region level, for Swimming Waikato

No Data Available

Return Add Team



5

After clicking Add Team, the following page will appear. It will show you swimmers that can be selected for the relay team. You can then sort this by the fastest swimmer by clicking on the "Best Time" Heading. Enter the swimmers into the team by typing their names into the "Competitors" box. Once you have added all the swimmers you want click on "Check Competitors" and this will calculate the seed time. If you are happy with this click "Save Team".

The Relay Team is at Region level

Leg	Stroke	Competitors	Best time	Type
1	Freestyle	<input type="text" value="Lochlainn McGall"/>	4:28.16	(S)
2	Freestyle	<input type="text" value="Thomas Griffin"/>	4:37.85	(S)
3	Freestyle	<input type="text" value="Michiel Cumming"/>	4:46.74	(S)
4	Freestyle	<input type="text" value="Tiaan Van Rooyen"/>	4:50.64	(S)

Valid relay

Seed time

Seed course

i The list(s) below are Competitors who are eligible for this Event. Note that additional eligible Competitors may become visible when eligibility analysis is updated.

Freestyle

Number	Name	Meet	Title	Date	Best Time	Course
351904	Lochlainn McGall	000960	Swimming BOP SC Championships 2015	19/07/2015	4:28.16	S
375316	Thomas Griffin	000960	Swimming BOP SC Championships 2015	19/07/2015	4:37.85	S
327561	Michiel Cumming	000873	Xcelerate Your Points 2015 Taupo	07/06/2015	4:46.74	S
375316	Thomas Griffin	000282	2015 New Zealand Junior Championship	20/02/2015	4:47.37	L
360339	Tiaan Van Rooyen	000531	Te Awamutu Classic 2014	01/11/2014	4:50.64	S
351909	Ryan Stokes	000960	Swimming BOP SC Championships 2015	19/07/2015	4:53.10	S

Page 1 of 2 | 1 - 6 of 10 | Per page 6

6

Home Find Add Courses Meets Results

The details have been updated.

Once the details have been updates select 'Return'



7

Then, select 'Add Team' to book any additional teams in that event.

Relay Teams for Event

Meet (001103) 2016 NZ Open Championships
Event (15-15) Men, 4x100 Medley Relay

i Teams will be created at Region level, for Swimming Auckland

Team Name	Valid	Booked
Swimming Auckland - A	Y	Y
Swimming Auckland - B	Y	N

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Return **Add Team**

8

Once you have added your teams please ensure that you **BOOK** the team to confirm their entry.

Meet: (001098) APT Test Meet - TO Nominations

Relay Events for this Meet

Event	Description	Age From	Age To	Gender	Legs
11-11	Men, 4x800 Freestyle Relay	0	109	Men	4
22-22	Women, 4x100 Freestyle Relay	0	109	Women	4
32-32	Men, 4x100 Freestyle Relay	0	109	Men	4
33-33	Women, 4x800 Freestyle Relay	0	109	Women	4
41-41	Men, 4x400 IM Relay	0	109	Men	4
42-42	Women, 4x400 IM Relay	0	109	Women	4

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Relay Teams for this Meet

Event Code	Event Title	Event Sub	Description	Team Name	Valid	Booked
001098	APT Test Meet - TO Nominations	32-32	Men, 4x100 Freestyle Relay	Swimming Auckland - A	Y	N

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Cancel **Book**

Follow the prompts until your booking is confirmed and the following confirmation appears.

Booking confirmation

You have successfully amended the Entry for Region 1 for 'APT Test Meet - TO Nominations'



Qualifying Rules for SNZ Database

This is a quick guide to the qualification rules for clubs or regions when setting up a meet.

LONG COURSE RULES

1

Long Course (Long Course time only)

Long course best time used for qualification and entry. Short course times not considered.

2

Long Course (Allow SC Converted)

The database will compare a swimmers best long course and converted short course time. It will then select the faster of the two times and the swimmer will be entered with that time.

3

Long Course (Allow SC Unconverted)

The database will compare both long course and short course best times and select the fastest. If the short course best time is fastest that will be used for entry unconverted with the seed course short course.

4

Long Course (Allow SC Converted) *entry is unconverted

If the swimmer has a long course best time that meets the qualifying time they will be entered using their long course best time. If their long course time does not meet qualifying times but a converted short course time meets the qualifying time that will be used and the swimmer will be seeded with an unconverted short course time.

*This is the qualification rule to use if you are using the LSY qualification priority in Meet Manager.

SHORT COURSE RULES

1

Short Course (Short Course time only)

Short course best time used for qualification and entry. Long course times not considered.

2

Short Course (Allow LC Converted)

The database will compare a swimmers best long course and short course time. It will then select the faster of the two times and the swimmer will be entered with that time.

3

Short Course (Allow LC Unconverted)

The database will compare both short course and long course best times and select the fastest. If the long course best time is fastest that will be used for entry unconverted with the seed course long course.

4

Short Course (Allow LC Converted) *entry will be unconverted LC if it's the fastest)

If the swimmer has a short course best time that meets the qualifying time they will be entered using their short course best time. If their short course time does not meet the qualifying times but a converted long course time meets the qualifying time that will be used and the swimmer will be seeded with an unconverted long course time.

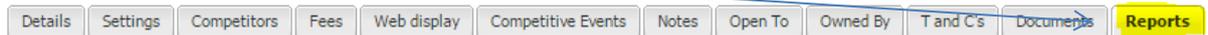
*This is the qualification rule to use if you are using the SLY qualification priority in Meet Manager.

Meet Eligibility Reports

Making a member analysis request to produce a meet eligibility report. This will allow you to see the swimmers from your club and what races they are eligible for prior to a meet.

1

In the database you will need to select the meet you would like the eligibility report for and go into the **Reports** section.



2

In the report section select **Member Analysis Request**.
On the next page select **Make Request**.
Once the request has been submitted you can **Review Request**.
This section will indicate when the report is complete.

Click to request analysis for eligibility report:

Member Analysis Request

Request member analysis

Calculating analysis for Region Level - Swimming Otago
Please note Analysis Requests are queued and may take some time to complete.

Are you sure you want to post the request?

Return to Meet **Make Request**

✔ Your Analysis Request has been submitted.

⚠ Please note that requests are queued and may take some time to process. Click below to review the status of your request or return to the Meet.

Return to Meet **Review Request**

Request member analysis

Calculating analysis for Region Level - Swimming Otago
Please note Analysis Requests are queued and may take some time to complete.

Requested by (955100) Miss K E Gibson
Requested on 23/09/2015
Requested at 16:46:13
Completed on
Completed At

Are you sure you want to re-post the request?

Return to Meet **Make Request**

Meet Eligibility Report - Open

Meet Eligibility Report by Age

3

Select the eligibility report you need (open or by age). This report will identify which races your swimmers qualify for in the selected meet.

4

The report will show: Swimmer's name, age and Meet Manager ID. It will then show the event number, distance and stroke, the qualifying time and the swimmers time.

Mr C J Moran NEPMCJ111100 (14) Qualifying Times	#1A 200 IM 2:46.00 2:37.38 S	#15A 200 Fly 2:51.78 2:35.78 S	#24A 400 IM 5:55.60 5:39.75 S	#29A 100 Fly 1:17.64 1:09.01 S	#33A 50 Free 29.80 29.47 S	#49 100 IM 1:16.72 1:13.28 S	#59 50 Fly 34.67 31.25 S						
Mr A D Trembath NEPTAD301196 (18) Qualifying Times	#1B 200 IM 2:40.00 2:05.60 L	#3B 400 Free 4:48.90 4:15.48 L	#5B 100 Back 1:12.86 53.93 S	#9 50 Breast 36.97 30.67 L	#17B 100 Free 1:02.80 54.14 S	#24B 400 IM 5:44.10 4:22.32 S	#29B 100 Fly 1:13.99 55.00 S	#33B 50 Free 28.60 25.63 S	#41 50 Back 32.35 24.90 S	#54B 200 Back 2:35.76 1:57.72 S	#58B 200 Free 2:17.50 1:52.00 S	#61 50 Fly 32.65 25.73 S	
Mr E L Alloo KIWAEL020702 (13) Qualifying Times	#7 50 Breast 38.94 38.51 L												

*Note: The database runs an analysis of members on a ten minute cycle to avoid overloading the system if there is a large demand.



How do I update my committee details to give them access?

BEFORE YOU START...

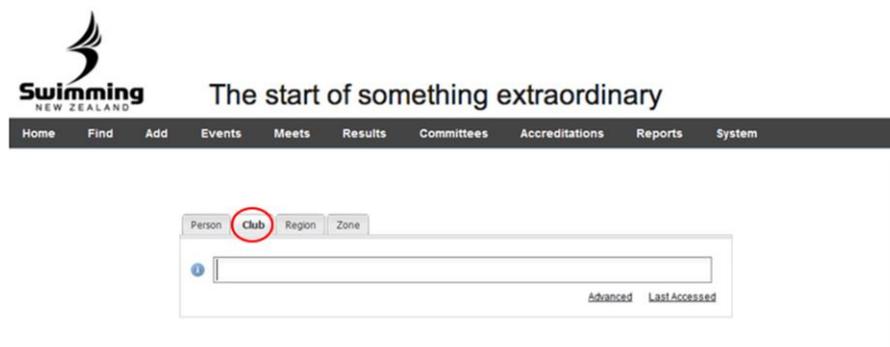
Assigning members to committee roles not only helps Swimming New Zealand and Swimming Regions to ensure that we have the correct committee contact details for your club, but it will also provide each committee member with access to the database.

Committee members will be required to use their own individual membership username and password to access the database. The intention of this is to provide users of the system a single sign-on to access all elements of the MMS/CMS. For this reason, all committee members **MUST** be registered members of a club in order to be aligned to a committee role in the database.

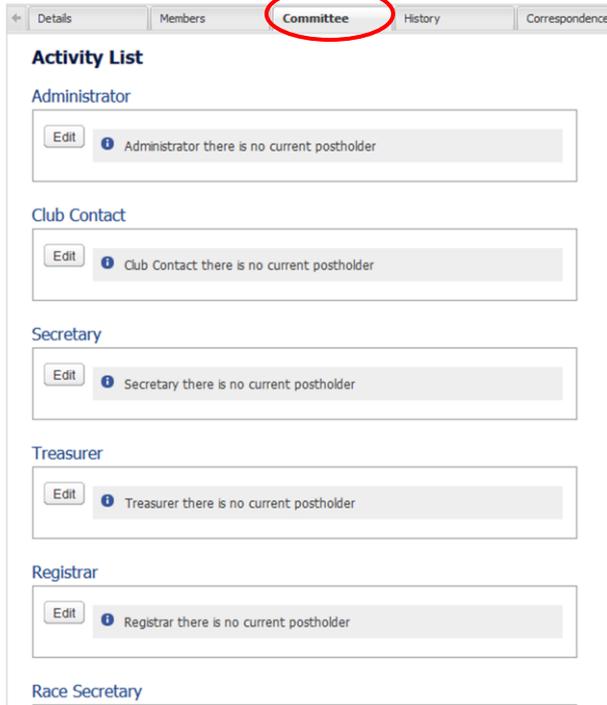
It is important that committee details are entered correctly as the database will only be available using an individual committee member's unique log in.

1

Once logged into the system using your username and password, click the club tab and access your club's profile.



2



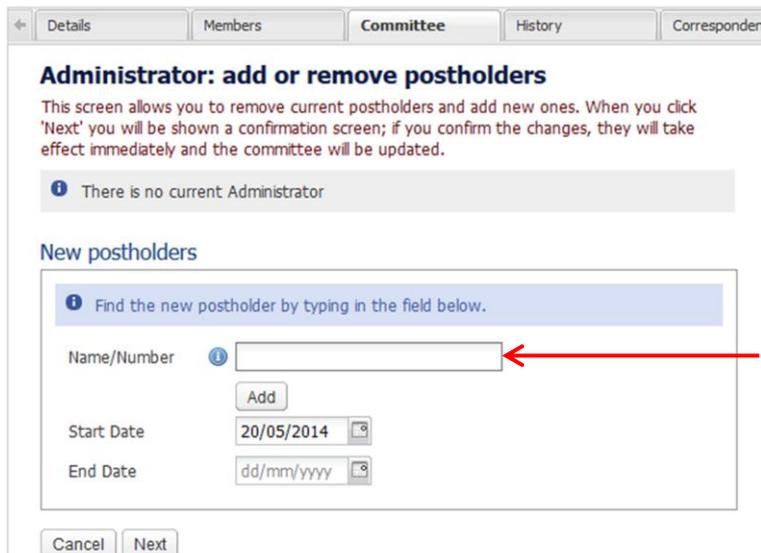
The screenshot shows a web interface with a navigation bar at the top containing tabs: Details, Members, Committee (highlighted with a red circle), History, and Correspondence. Below the navigation bar, the page is titled "Activity List". Under this title, there are several sections, each with an "Edit" button and a message: "Administrator there is no current postholder", "Club Contact there is no current postholder", "Secretary there is no current postholder", "Treasurer there is no current postholder", and "Registrar there is no current postholder". At the bottom, there is a link for "Race Secretary".

Select the Committee tab. This screen will allow you to view and edit the details currently recorded in the system.

Select the Edit button and then... see next step

3

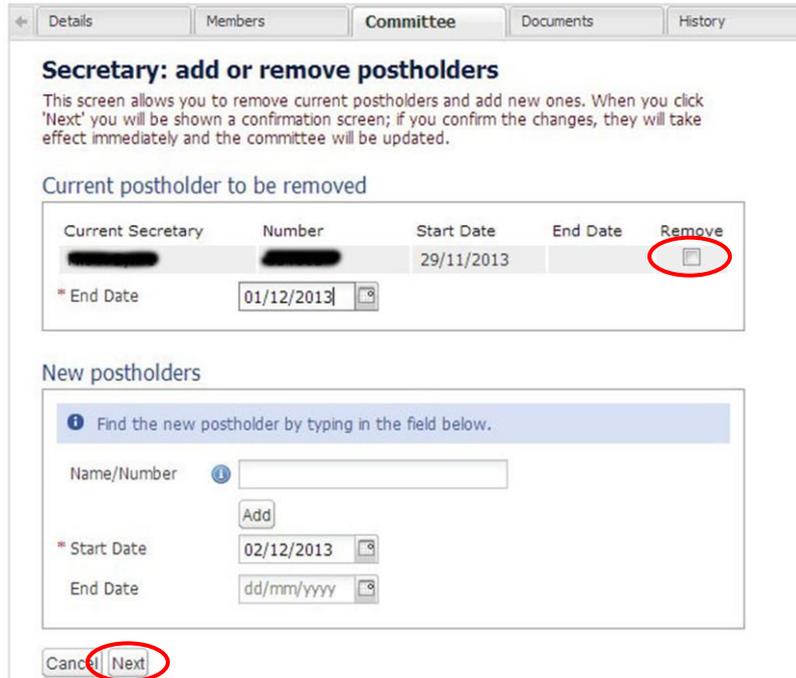
Begin typing the committee member's surname and click the person's name that holds that position. Note: committee members must be members of your club to be aligned with a committee position.



The screenshot shows a web interface with a navigation bar at the top containing tabs: Details, Members, Committee (highlighted with a red circle), History, and Correspondence. Below the navigation bar, the page is titled "Administrator: add or remove postholders". Under this title, there is a message: "This screen allows you to remove current postholders and add new ones. When you click 'Next' you will be shown a confirmation screen; if you confirm the changes, they will take effect immediately and the committee will be updated." Below this message, there is a message: "There is no current Administrator". Underneath, there is a section titled "New postholders" with a message: "Find the new postholder by typing in the field below." Below this message, there is a form with a "Name/Number" field (with a red arrow pointing to it), an "Add" button, a "Start Date" field (with the value "20/05/2014"), and an "End Date" field (with the value "dd/mm/yyyy"). At the bottom, there are "Cancel" and "Next" buttons.

4

The selected member information will be populated in the field. If there is an existing postholder already aligned to the committee position who no longer needs to be aligned to this position, select Remove by ticking the box, then select Next.



← Details Members **Committee** Documents History

Secretary: add or remove postholders

This screen allows you to remove current postholders and add new ones. When you click 'Next' you will be shown a confirmation screen; if you confirm the changes, they will take effect immediately and the committee will be updated.

Current postholder to be removed

Current Secretary	Number	Start Date	End Date	Remove
██████████	██████████	29/11/2013		<input checked="" type="checkbox"/>

* End Date

New postholders

Find the new postholder by typing in the field below.

Name/Number

Add

* Start Date

End Date

Cancel **Next**

5

You will receive the following confirmation screen upon completion.



← Details Members **Committee** Documents History

Secretary: updated

✓ The changes you made to the Secretary position have been successfully completed.

Return

Select Return and repeat this process to edit other committee members as required

Having different committee roles gives you access to different things.
If you have multiple committee roles do the following...

1

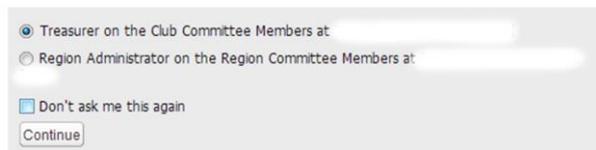
Selecting your active role

An individual with multiple roles will need to select the role they are assuming upon logging into the database.

For Example:

John Smith is a Treasurer at Example Club, John is also the President at Example Region. Upon logging into the database John will be greeted with the following message:

Select a Role

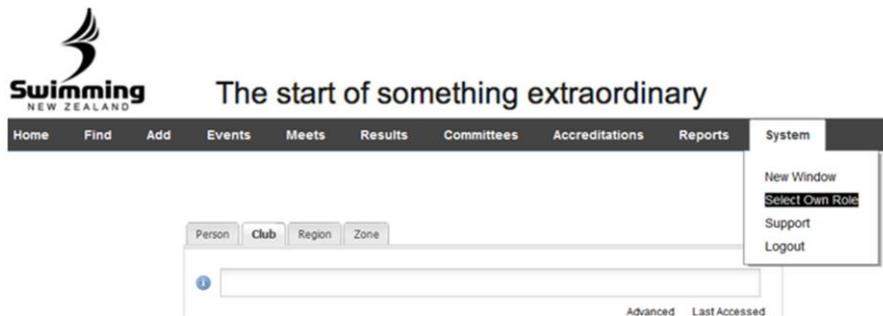


The screenshot shows a dialog box titled "Select a Role". It contains two radio button options: "Treasurer on the Club Committee Members at" (which is selected) and "Region Administrator on the Region Committee Members at". Below these options is a checkbox labeled "Don't ask me this again" and a "Continue" button.

Committee members will need to select which role they wish to act as before being taken to that particular console.

2

Once logged in you can change your active role by selecting the System tab from the menu items and then Select Current Role. You will be presented with the same Select a Role screen as when you log in, where you can select which role you now wish to assume.



Sending Password Reset Emails

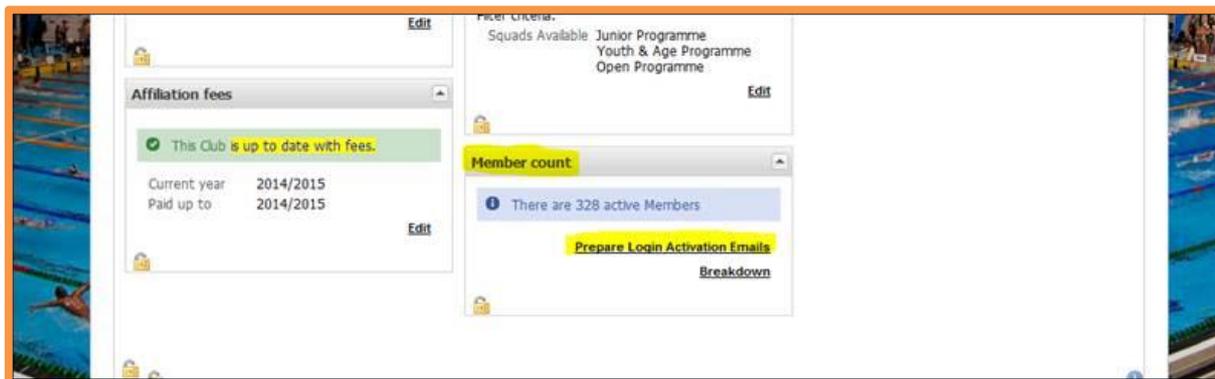
Sending a bulk email to members that haven't previously been sent a reset email.

1 Club Administrator or Regional Administrators need to go into the club page on the database.

2 Down the bottom of the page you will see a box that says "Member Count" there is a button in this box that says "Prepare Login Activation Emails" click this button and follow the prompts to send out password reset emails.

Clicking this button will bring up a list of members who have not been sent a password reset email yet.

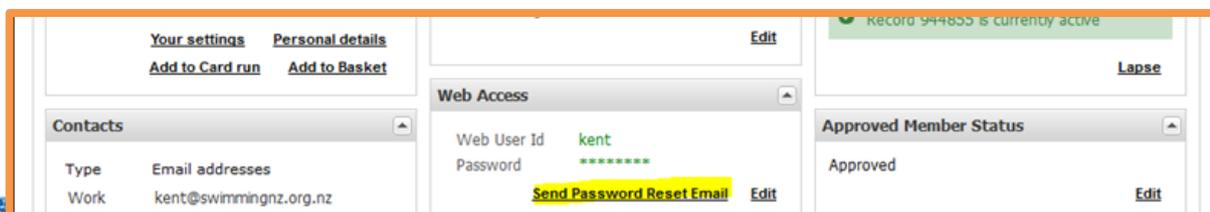
Please note that all members need to have an email address against their profile in the database to receive a password reset



Members that have previously been sent a reset email.

1 Club or Regional Administrators will need to go into the individuals profile in the database.

2 There is a "Web Access" box in the middle of the page. This box has a "Password Reset Email" button, click this to send the password reset email.



How do I edit members' usernames and passwords?

1

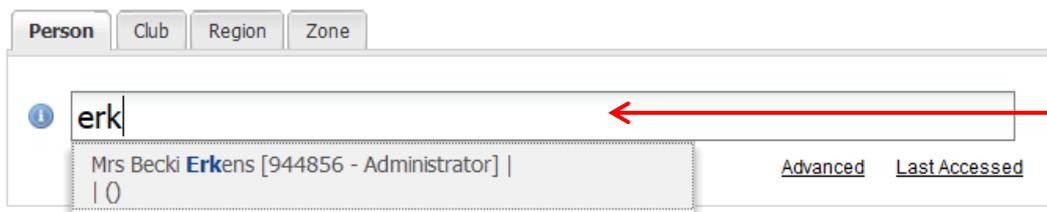
From the homepage ensure the Person tab is selected.



Here you can search for the member whose details need editing.

You can search a few different ways;

- Members name
- Member number
- Or use the Advanced tab to search more specific attributes

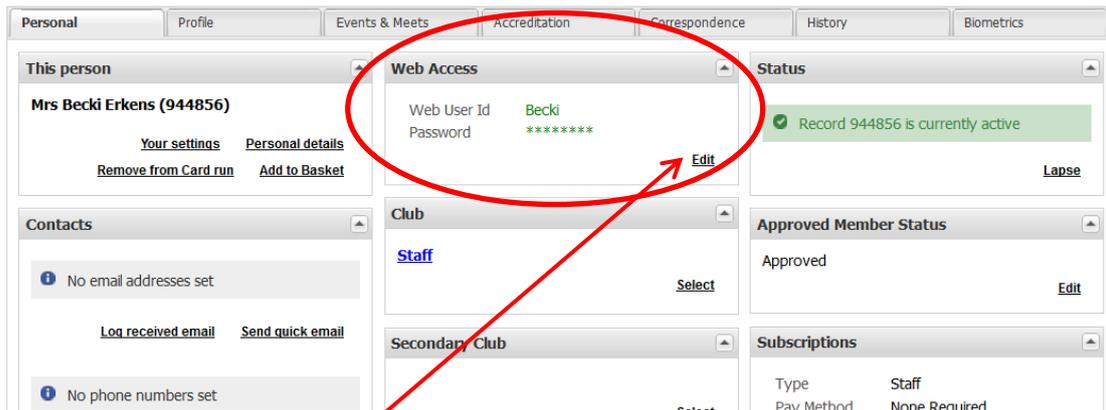


Once you find the member their details will appear.



2

Under the **Personal** tab you will see the Web Access box, click the **Edit** button



The screenshot shows a user profile for Mrs Becki Erkens (944856). The 'Web Access' section is highlighted with a red circle. It contains the following information:

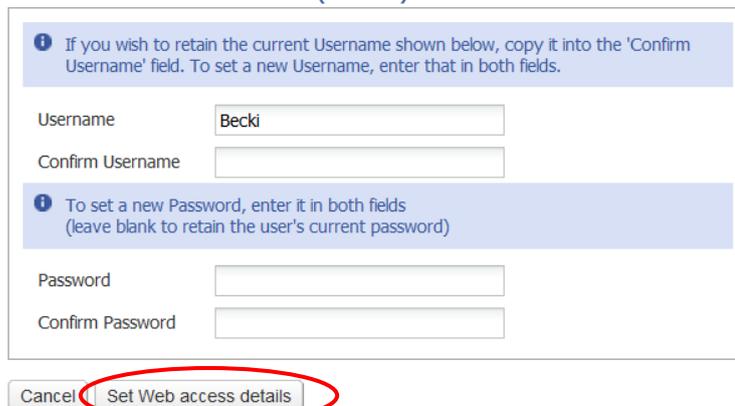
Field	Value
Web User Id	Becki
Password	*****

Below the Web Access section, there is an **Edit** button. A red arrow points from the **Edit** button to the **Web Access** section.

3

In the window that appears you can now edit the member's Username and/or Password by typing in the relevant fields and clicking 'Set Web access details' to save changes.

Web access: Mrs Becki Erkens (944856)



The screenshot shows the 'Web access details' form for Mrs Becki Erkens (944856). It contains the following fields:

- Username:** Becki
- Confirm Username:** (empty)
- Password:** (empty)
- Confirm Password:** (empty)

At the bottom of the form, there are two buttons: **Cancel** and **Set Web access details**. The **Set Web access details** button is circled in red.

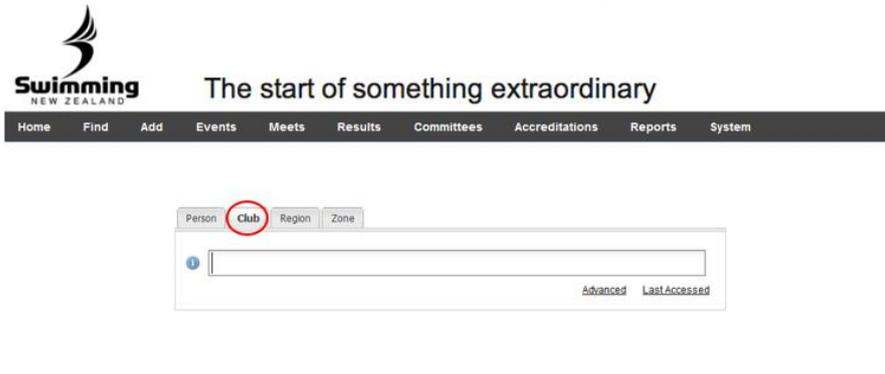
How do I set up my bank details and GST preference?

It is important that clubs enter their club's bank details, in order for all fees from online memberships and event entries to be directly deposited into the club's bank account.

Entering the club details is a two-part process, where one committee member must enter the bank details, and another must verify and accept these details as correct.

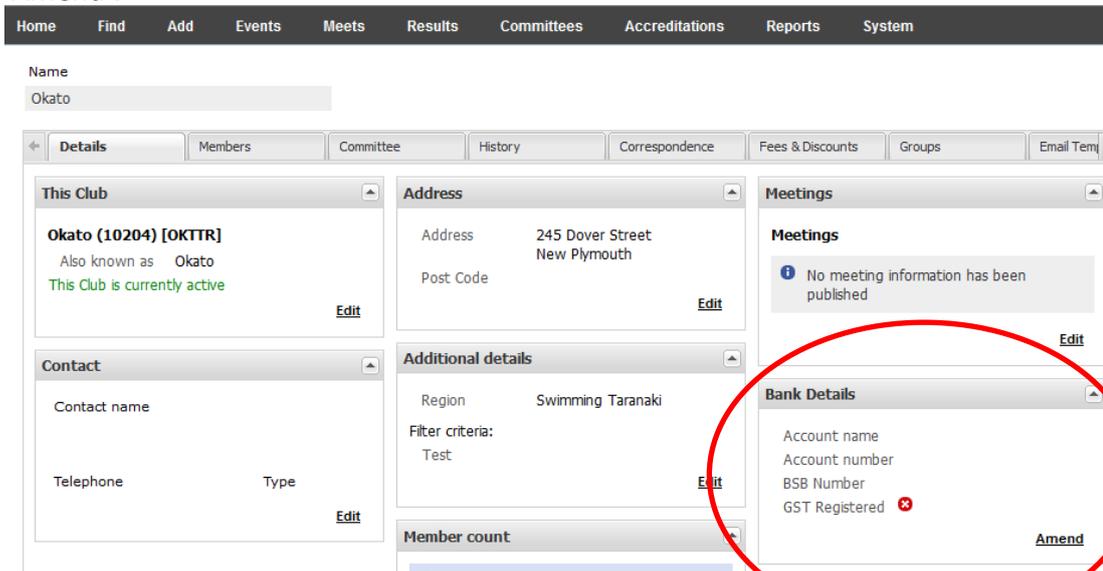
1

Click on the club tab and access your club's profile.



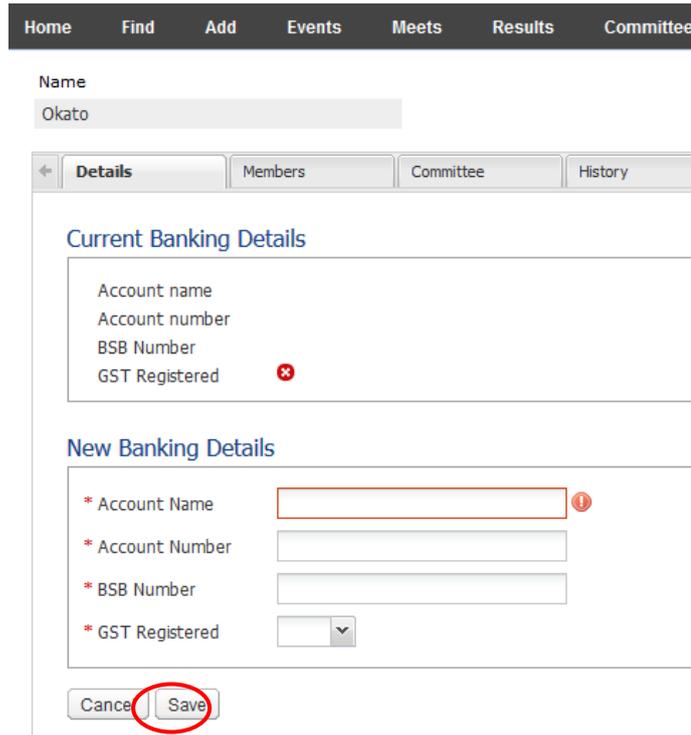
2

On the Details tab you can view the current banking details recorded for your club in the right-hand column. If the Bank Details fields are blank no details have been added. To edit these details, or to set up details for the first time, click 'Amend'.



3

The next screen will allow you to fill out or amend the details as recorded, as well as advising if your club is GST registered.



Home Find Add Events Meets Results Committee

Name
Okato

← Details Members Committee History

Current Banking Details

Account name
Account number
BSB Number
GST Registered ✘

New Banking Details

* Account Name !
* Account Number
* BSB Number
* GST Registered

Cancel Save

Note: BSB Number= Bank (2 digits) then branch (4 digits).

Click 'Save' once completed and the system will take you back to your club's profile page.

4

When modifying the original bank details supplied, a second committee member will be required to verify and approve these bank account details.

To verify the account details, the second committee member must log in with their individual log in details, following the same above steps and select Approve on the Bank Details screen if correct. If these details are incorrect the committee member must click the Reject button and follow the above steps to complete the correct details.

It is important that your club banking details and GST Preference is set up correctly in order for funds from any online transactions are correctly distributed to your club.

This is a two-part process:

1. Club banking details and GST Preference must be set up first.
2. A second committee member must log in (using their individual log in) and verify that the banking details and GST preference are correct.

1

If you are seeing this image, follow these steps to verify and approve the banking details for your club. 

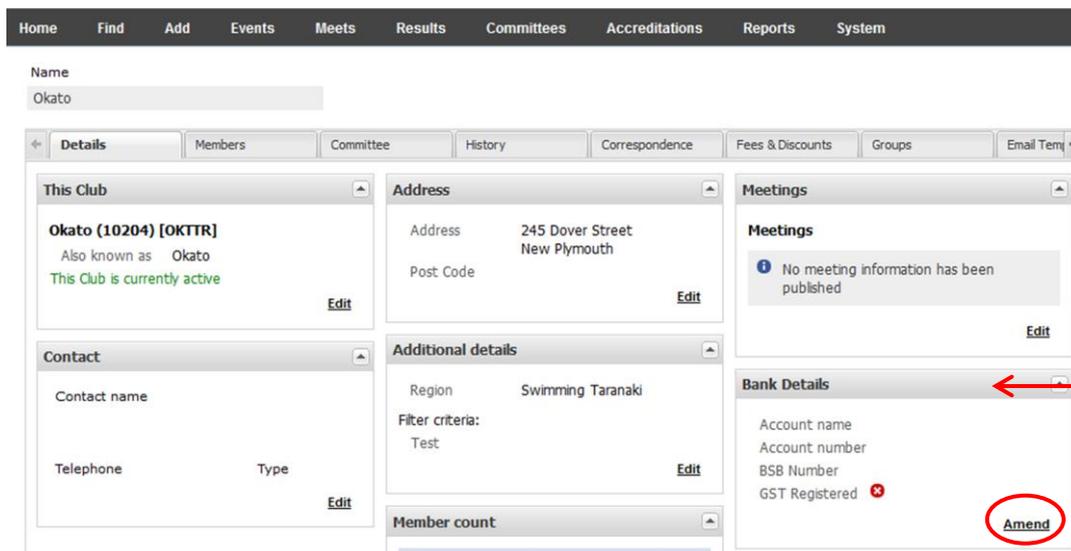
Bank Details

⚠ **Unapproved Bank details**

Account name
Account number
BSB Number
GST Registered

3

Select Amend under the Bank Details section.



The screenshot shows a web application interface for club management. At the top is a navigation menu with items: Home, Find, Add, Events, Meets, Results, Committees, Accreditations, Reports, System. Below the menu is a search bar with 'Okato' entered. A secondary menu includes: Details, Members, Committee, History, Correspondence, Fees & Discounts, Groups, Email Temp. The main content area is divided into several sections: 'This Club' (Okato (10204) [OKTR], Also known as Okato, This Club is currently active, Edit), 'Address' (245 Dover Street, New Plymouth, Post Code, Edit), 'Meetings' (No meeting information has been published, Edit), 'Contact' (Contact name, Telephone, Type, Edit), 'Additional details' (Region: Swimming Taranaki, Filter criteria: Test, Edit), and 'Member count'. The 'Bank Details' section at the bottom right shows 'Account name', 'Account number', 'BSB Number', and 'GST Registered' with a red 'x' icon next to it. An 'Amend' button is circled in red, and a red arrow points to the 'Bank Details' section header.

4

Review the bank details and ensure they are correct, then Approve.

GST Registered	
Requested By	[Redacted]
Requested on	28/11/2013

5

Bank Details

Account name	[Redacted]
Account number	[Redacted]
BSB Number	[Redacted]
GST Registered	[Redacted]

[Amend](#)

Your clubs bank details will now show on the Details



Setting Club Membership Fees.

Before you start the renewal process you must set the membership fees for your different membership types.

- 1 Click on the Fees & Discounts tab in your clubs profile on the database.
- 2 Click on any membership type that you need to add fees against and edit the following.
- 3 Click the box for a joiner and reinstatement.
- 4 Ensure that the payable after date is 01/07 in the current year.
- 5 Enter your club fees for that membership type.
- 6 Click on the recalculate button

Annual Fee

* Member type

Description

Region Member type

Valid for joiners

Valid - reinstatement

Obsolete

Annual Subs

Payable After	Club Fees	Other subs	Total
<input type="text" value="01/07/2015"/>	<input type="text" value="125"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="dd/mm/yyyy"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- 7 Click "save" at the bottom of the page.

Note that if you have a pro rata payment where it changes throughout the membership year this can be added in this section. Add a start date for the new price to start and create as many of these as you have changes in charges.



Discount Packages

NOTE: The discounting mechanism is a club facility.

It is designed for clubs to be able to provide groups with discounted subscriptions based on the number of people and their membership type. The discount applies to the club element of the subscription only. Hence is a structure such as this:

National	10
Regional/State	20
Group/Region	30
Club	40

A 10% discount would be \$4.00 being only the club element that is discounted.

Equally the \$4.00 will be deducted from the amount for the club.

1

NOTE: The discount can be set to be a percentage or an amount. The percentage will always be that percentage of the club element, if the percentage is ignored and the amount is entered the discount will be the lower of the amount stated and the amount for the club. So the three members with the structure above would gain a \$75 discount if that was entered on the discount structure but would only get \$120 discount if an amount above \$120 was entered since this is more than the amount being paid to the club.

Setup

The starting screen allows you to define the package that the family or group must match to get the discount.

Discount Package

* Name

Discount Package

Member Type	Number	
Recreational Swimmer	4	Delete
Competitive Swimmer	1	Delete
<input type="text"/>	<input type="text"/>	

Add

Cancel Delete Next

NOTE: The name can be anything, it has no relevance to the package hence this one is called 4 swimmers but actually is 4 recreational swimmers and a competitive swimmer. That is user choice as to what it is called.



The second screen defines the discount to apply, There are two options as to how this is done:

Specify Percentage: In this mechanism you know the percentage that you want to apply, you enter that percentage into the field and click on Recalculate. The system will work out the amount to apply and will display it in the Discount field.

Discount

Percentage (optional)	<input type="text" value="10"/>
<input type="button" value="Recalculate"/>	
Standard Fee	447.00
Discount	<input type="text" value="13.2"/>
Total	433.80

Specify Amount: If the aim is to discount by a specified amount then leave the percentage box blank, go to the Discount field and enter the amount.

Discount

Percentage (optional)	<input type="text"/>
<input type="button" value="Recalculate"/>	
Standard Fee	447.00
Discount	<input type="text" value="20"/>
Total	427.00

NOTE: There is no check on the amount of discount entered at this time. If the amount entered as the discount is more than the amount being charged by the club then this will be allowed here but will be limited when the payment is made.



Pro Rata Membership Fees

This is only relevant for club membership fees, not regional or national fees.

1

There is also now the ability to set up pro rata fee payments for clubs membership fees. See below:

Annual Fee

* Member type

Description

Region Member type

Valid for joiners

Valid - reinstatement

Obsolete

Annual Subs

Payable After	Club Fees	Other subs	Total	
<input type="text" value="01/07/2014"/>	<input type="text" value="80"/>	90.50	170.50	<input type="button" value="Delete"/>
<input type="text" value="01/01/2015"/>	<input type="text" value="60"/>	90.50	150.50	<input type="button" value="Delete"/>
<input type="text" value="01/04/2015"/>	<input type="text" value="40"/>	90.50	130.50	<input type="button" value="Delete"/>
<input type="text" value="dd/mm/yyyy"/>	<input type="text"/>			

Parameters for junior fee type (optional)

Lower age limit

Upper age limit

Next Age Change to

Renew as a different type (optional)

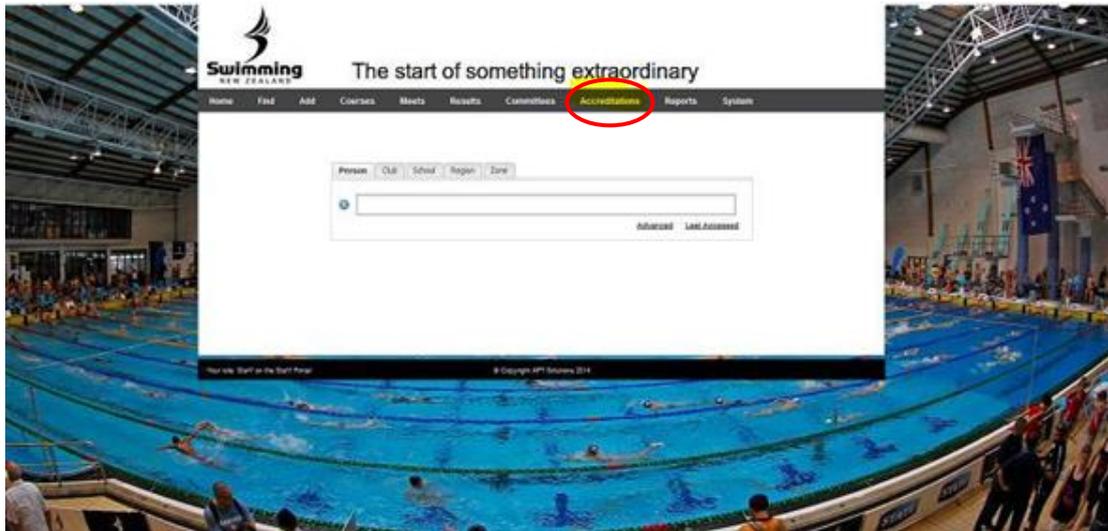
Renew As

A club can set different fees based on the date that the renewal takes place. They will set up the full fee from 1/07/ of the membership year, but then they are also able to set up other fees rates that will be charged if membership starts at a later date in the membership year. Given the example above if a swimmer was to join on 2nd January 2015 it would only charge them \$150.50 rather than \$170.50.

Adding an Accreditation

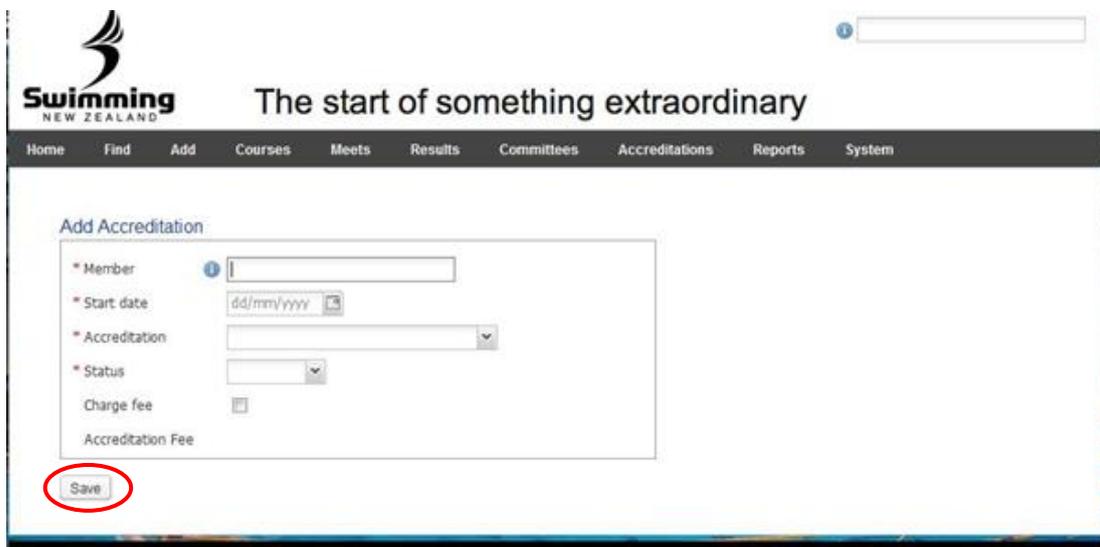
1

Hover over Accreditations and click on the add accreditations button



2

The following screen will show up. Fill in the areas. All regional accreditations can be found in the Accreditation drop down. Once done click save and the accreditation will be recorded against their profile.



A screenshot of the 'Add Accreditation' form on the Swimming New Zealand website. The form is titled 'Add Accreditation' and contains the following fields: 'Member' (text input), 'Start date' (date picker), 'Accreditation' (dropdown menu), 'Status' (dropdown menu), 'Charge fee' (checkbox), and 'Accreditation Fee' (text input). A 'Save' button is circled in red at the bottom left of the form. The background shows the website header and a search bar.

3

To view the accreditation in the members profile simply click on the accreditations tab along the top of their profile



Regional Administrators should only add regional accreditations to official's profiles. National Accreditations are only to be added by Swimming New Zealand.



Nominating Officials/Volunteers

This is a new addition to the setup of a meet. This will enable you give members information about the volunteers and technical officials you require to run your event.

1

Volunteers / Technical Officials

Invite volunteer Tick to invite entrants to offer a volunteer

TO Nominee info i

Position	Qty	Accreditation Required	Level	
Starter National	<input type="text"/>	<input checked="" type="checkbox"/>	Region	Delete
Inspector of Turns National	<input type="text"/>	<input checked="" type="checkbox"/>	Club	Delete
Judge of Stroke National	<input type="text"/>	<input checked="" type="checkbox"/>	Region	Delete
Timekeeper Regional	<input type="text"/>	<input type="checkbox"/>	State	Delete
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	National	Delete
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	Delete

Add

Save

By selecting this box, the members who enter via their MyPage will be invited to volunteer to assist with the meet.

Advise nominees of any additional information they may need before they select a position.

Use this checkbox to select whether technical officials will need accreditation for the position they select.

Select which level of accreditation you require your technical official to have.

Select the various positions of technical officials you require for your meet.

Insert the number of technical officials you require for each position.