Orienteering SA: Notes on Use of Eventor for Club & State Admins:

Prepared by Ken Thompson IT Manager Updated 13th September 2020
Please feel free to point out errors or suggest improvements to these notes.
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Cumulative Update Notes:
Sept 2020

- *Further changes in way casuals are now handled nationally and by each state. (p4 & 9)*
- *Respite days for payment no longer apply. When done through Eventor payment is required at time of applying for membership or entering an event (p8)*

Nov 2018 Changes in the way we handle Casual Registration. Adjustments to some links
July 2018 Links updated. General update of instructions. Amended notes re Casuals
March 2016

- *Changes in the way casual registrations are handled due to payment being linked to membership at future pre-payment events.*

Feb 2016
New scenario added: dealing with duplicate names in the system (p7)
Nov 2015

- *Individual membership will be able to be renewed by a simple process based on the user's previous renewal.   The user can optionally include other family club members in the renewal which leads to a single order to be paid via PayPal.*
- *An individual member will also be able to renew the membership of another club member without renewing their own membership at the same time. This will allow club members to assist those who are not confident to use the system.*
- *Family group membership renewal will also be able to be renewed as a batch. The user can optionally include additional family club members to the batch which leads to a single order to be paid via PayPal.*
- *Eventor club administrators will now be able to send out a batch of emails to all members who need to renew their membership. On receiving the individualised email, a user will be able to click on a renewal link that will take them to Eventor to login and complete the renewal. To do this go to Administration -> Club Members -> Membership types and click on Send renewal emails.*
- *The existing membership methods for adding membership will still be available and will still be needed for adding membership to new registrations.   So a new family group member will still need to register and add themselves to their family group membership*

General *notes:*

- *These notes are not intended to cover everything as in time the help screens and other resources in Eventor will do this. I have focused on the functions that have caused the greatest difficulty or are less obvious to access.*
- *As you will see from the online U Tube videos there is more than one way of carrying out some tasks. Below are the ways I have found quickest and easiest to follow. If you find a better way of doing some things or any errors please let me know so that I can continue to improve this document.*
- *All participants in events run by Orienteering SA and its affiliated clubs are required to either become members or register as casual orienteers before participating in any events. This*

can now be achieved by filling in all the details on the event registration form and entering CR in the club box.

SECTION 1 *The notes in this section are <u>suitable for distribution to members and potential members</u> to guide them in the use of the system. You will also find this helpful when assisting members of your club. A separate file of this section is available. This and other information about membership can be found in the membership section of our website:*
https://sa.orienteering.asn.au/about-orienteering/join-now
There are also now pictorial help sheets at this location for help with renewing membership

Club Membership using Eventor.   **PLEASE TAKE ONE**

Updated 13th Sept 2020 Ken Thompson IT Manager Orienteering SA itmanager@sa.orienteering.asn.au

Members from all metropolitan clubs (OH, YA, TT, TJ and WA) are able to register and pay online using either electronic funds transfer with polipayments (preferred as costs are less for Orienteering SA), paypal or their credit card. **Eventor Login**: https://eventor.orienteering.asn.au/Login

In the case of country clubs (SB, LI and TEO) you will have the option of paying by manual EFT, cheque or cash. Country clubs also have a paper membership form but are encouraged to register online as it will save their treasurer/secretary a lot of work having to enter your information into the system manually.

Scenario 1 Quick Guide: Renewing Individual and Family Membership in Eventor
Eventor uses your previous year's membership details to create your renewal form for the next year.

If you had family membership the previous year, Eventor will prompt you to renew your family membership and all members of the family can be renewed in a single payment.

If you had individual membership in the previous year you can renew your own membership and can optionally include family or other members of your club in a single payment.

- ➢ Go to the Australian Eventor Site: http://eventor.orienteering.asn.au
- ➢ Login and then select My pages > My memberships
- ➢ Click on the 'renew' link and check your membership and personal info is correct
- ➢ Select and add another person from your club if you want to include them in the renewal
- ➢ Select 'Next' on the bottom of the screen, then 'Save', then 'PayPal' or 'Poli'
- ➢ Complete the payment in PayPal or Poli and then check your receipt and memberships

If you want to renew the membership of another club member without renewing your own, in the 3rd step above click 'Manage memberships for another person' instead of the 'renew' link.

Pictorial Guides are available on the Orienteering SA Website (go to About Orienteering -> Join Now)for both individual and family group renewals if you require them.

Scenario Two: You have not previously registered in Eventor and wish to become a member

<u>You need to Register yourself, select a club and if you are a family to do the same for all family members</u>

- • Go to the Eventor Web site using the following link:
- • Choose "Create User Account" from the list of options.

- Choose "I am or want to be a member in a club affiliated to Orienteering Australia or one of its state associations"
- Follow the prompts for the rest of the process.
- After registering the first person you should see **The Registration is Complete** on the screen
- Select Apply for Membership
- Select Current Year -> Orienteering SA and then select the appropriate club or Casual Registrations if you do not wish to be a member. Follow the prompts.
- Family Membership is a valid option for an adult couple plus any children under the age of 20 living at the same address.
- If you are part of a family choose new family from the drop down menu under both Orienteering SA & Club of choice..
- Follow the remaining prompts
- Log off and follow the same process for each family member.
- When registering the last person in a family select "I am the last person in this family. Don't allow additional persons to be added." You can unselect this option if you need to at a later stage.

Scenario Three You have previously registered in Eventor but have not joined a club yet and wish to.

If you already registered with Eventor simply log on and go to My pages - > My memberships -> Click on Apply for Membership -> Select current year and follow the prompts. Refer to the notes above under Scenario Two if you are part of a family.

Scenario Four You have previously registered for Eventor and wish to take up family membership adding other family member(s) to this membership

Just follow these steps:

1. Log on to Eventor as yourself.
2. Click on Apply for Membership (top left of screen in green)
3. Follow the prompts and make sure you click on a family option in both Orienteering SA and your club of choice
4. In both cases also click on new family in the drop down menu
5. Follow prompts & click next -> Pay -> Logout

To add another person (Assuming they are not already registered. If they are they can log on & select family membership & add themselves to your family -> steps 5 onwards below)

1. Choose "Register Me" from the list of options.
2. Choose "I am or want to be a member in a club affiliated to Orienteering Australia or one of its state associations"
3. Follow the prompts. Because all previous member were uploaded into the system you may find that some fields will pre fill. Give them a separate username & password (the password can actually be the same if you wish but not the username)
4. After registering you should see **The Registration is Complete** on the screen
5. Stay logged on as this person. Click on Apply for membership
6. Follow the prompts and make sure you click on a family option in both Orienteering SA and your club of choice.
7. In the drop down menu select the name of the main contact person so that the extra person is linked in the family membership. Do this for both the Orienteering SA membership & your club of choice.
8. If this is the last family member you are entering there is an option to click a tick box to show this is the last to be entered. If you tick this your family will no longer appear in the drop down menu. (If there were more members to add you would have to log off & repeat steps 1-9)

9. Follow the remaining prompts. You will note that you are not asked for another payment as this has already occurred!

Scenario Five: I am the contact person for a school and want my school to join a club. Normally you just join or re-new in the normal way **using your name in the First Name Field and the schools' name in the Surname field**. Another option is to get the club secretary to do it for you. A hard copy form is also available on the Clubs & Membership page or Schools page on our website.

Scenario Six: I do not wish to me a member at present but would lke to registered in **Casuals SA (non member).** Casual Registration is a non-member option and best suits those wanting to try out orienteering or those who compete on an occasional basis. Entry fees, for almost all events, are higher for non members. This can now be done easily online. A separate document is available on the website to assist you with this. Go to About Orienteering -> Join Now

Getting Help:

Simply Click on Need help? At the bottom right of each screen or click on the link :

http://support.orienteering.asn.au/

Club Contacts:

For a list of current club contacts go to the bottom of the memberships page ie About Orienteering -> Join Now.

General Contact: Ken Thompson itmanager@sa.orienteering.asn.au

SECTION 2 *The notes in this section are not intended for general distribution. They will be useful for admins (usually club secretary, treasurer, president and membership officer if you have one. If you wish to add someone to the admin or event management list you can do this yourself by going to Club -> Roles. Please let me know of any additions or subtractions so I can add or remove them from the mailing list) Country clubs, because they have continued to opt for manual EFT (or cash/cheque payments) will need to carry out these functions manually. In the case of Adelaide metro clubs most processes using paypal or polipayments are automatic. As payments go directly to Orienteering SA this part is managed mainly by the treasurer, treasurer@sa.orienteering.asn.au Country clubs have the option of changing to paypal and or polipayments at any stage.*

As someone with **admin & event management rights for Eventor** you can do a number of things which normal members cannot do including:

- Edit your club details
- Upload club logo
- Access club database: When you go to members & select current year you will only see current year. You can also select previous years if you wish to compare. If you select all you will see everyone listed.
- Export your club as a spreadsheet to use as you wish for emailing etc.
- Do a virtual login as a member of your club to assist in fixing problems or assisting someone.
- Edit details for each of your members
- Manage payments and make adjustments.
- Set up & manage pre entry events for your club
- Add or remove admins or event planners/organisers for your club.
- Manage and setup events.

MEMBERSHIP

Note:

- *While these notes are particularly relevant to country clubs who manage the process themselves metro Adelaide clubs will find it useful in assisting their members or correcting errors.*
- *Country Clubs should be aiming to get their members to be responsible for their own membership as far as possible to minimize the workload of the person managing the process.*

Once someone has paid for club membership you need to mark this down in Eventor. The steps in this are listed below.

Situation One: The member has already registered on Eventor themselves.

If they have applied for membership and paid your club follow the steps below

1. Click on your Club
2. Click on members

3. It should default to the current year so you can see who has registered this year. If not select current year from the drop down menu rather than ALL
4. A red cross next to a name indicates they have registered as a member of your club but not paid
5. Click on the membership type right next to the red cross eg Senior Concession)
6. Click on edit order
7. Click on register payment and record the payment date & amount. There is also a place to record any comments if necessary. eg you may want to record whether it was EFT cash or cheque.
8. Click save
9. If part of a family that is already linked you should only need to record payment for the main contact person.

Situation Two: If you have received a **paper membership form for a previous member** they should already be in the system so you can record their current membership as follows:

1. Click on Club
2. Click on members
3. Select year of previous membership from the drop down menu below your club name.
4. Find the name you need (main contact if family membership)
5. Click on the membership type they had in eg Senior Individual Local (To right of green tick)
6. Click on Add Membership
7. Year current year should appear. If not select from drop down menu
8. Click next
9. Select the membership type and click save
10. Click on edit order to record payment as above

If they are part of a family you will need to do this for each person

- Family Membership is a valid option for an adult couple plus any children under the age of 20 living at the same address.
- If you are part of a family choose new family from the drop down menu under both Orienteering SA & Club of choice..
- Follow the remaining prompts
- Log off and follow the same process for each family member.
- When registering the last person in a family select "I am the last person in this family. Don't allow additional persons to be added." You can unselect this option if you need to at a later stage.

Situation Three If you receive a **paper form membership for a new member**

You need to Register each person, select a club and if you are a family to do the same for all family members

- Go to the Eventor Web site using the following link: http://eventor.orienteering.asn.au/Events

- Choose "**Create Account**" from the list of options.
- Choose "I am or want to be a member in a club affiliated to Orienteering Australia or one of its state associations"
- Follow the prompts for the rest of the process.
- After registering the first person you should see **The Registration is Complete** on the screen
- Select Apply for Membership
- Select current year -> Orienteering SA and then select the appropriate club. Follow the prompts.
- Family Membership is a valid option for an adult couple plus any children under the age of 20 living at the same address.
- If you are part of a family choose new family from the drop down menu under both Orienteering SA & Club of choice..
- Follow the remaining prompts
- Log off and follow the same process for each family member.
- When registering the last person in a family select "I am the last person in this family. Don't allow additional persons to be added." You can unselect this option if you need to at a later stage.
- Make sure you inform a new family about their login & password

Situation Four: A person or family has previously registered themselves in Eventor but has not joined a club. The problem is that when someone has registered but not joined a club or registered as a casual they remain invisible to us. To fix this do the following:

- Log on as normal
- Go to Club Members -> Overview
- Click Create new members
- Click Add new member so that you do more than one at once if it is a family
- Enter their details but do not click Send password. Only put in an email for additional people if they have a different one
- Click next

It should then pick up that one or both are already there. Select the merge option which should work. You can then go back into your members overview list and add a correct membership category. You can then record any payment details in the normal way if they have paid.

About Logon Names & Passwords

Eventor suggests using your email address as a login. This is fine for an individual membership but difficult for a family. You may find it simpler to make in kthompson or kent and perhaps the same password for all family members. If a person forgets their password you can logon as them and reset it. Just go to Club -> Virtual Login.

Eventor also suggest using your Facebook or Google Social Network Account account. The jury is still out about how secure your details would be so I would recommend that you don't do this.

Managing Finances

Go to Club -> Finances

This allows you to do any of the following & more:

1. Obtain a payment summary for a particular period.
2. Search using a range of criteria

To edit click on the reference number.

General Payment Settings

Respite days for payment no longer apply. Payment is required at the time of applying for membership or when entering an event. In theory if PayPal and/or POLi are implemented the payment is made immediately.

Adjusting Membership Types

The main thing about changing any family membership status (it is the same for a single person except not so many steps) is first getting the main member right including their payment. Until the payment is recorded nothing will work.

- Log on
- Change to the club concerned.
- Club - > Members
- Click on membership type for person (not edit as edit is for changing personal details)
- Edit membership
- Click correct membership under club. . If family click new family
- Click the corresponding option under Orienteering SA including new family option
- Save
- Edit order
- Register Payment: put in payment date total amount and comment eg Changed from senior concession to family concession & add your initial
- Save
- Members -> current year or all if they do not appear (may have to register if they do not exist at all)
- Membership - click on this
- Add membership
- Current Year
- Next
- Click appropriate membership type and find family from above
- Click full time student
- Click last person if they are
- Do same thing under Orienteering SA
- Save
- Repeat with any remaining family members

CASUAL REGISTATIONS

- *Persons wishing to try orienteering or only participate on an occasional basis can become a member of Casuals SA.(short form CAS S). Starting this year (2020) this operates in all states. People need to understand however that they will be paying a higher entry fee at most events. Naturally the objective is to get these folk to join a club as soon as possible. Once registered they can do this at any time. The casuals club must not have any memberships types recorded to ensure they are listed as casuals not members. This also ensures they do not get member rates when entering an event. For the same reason they must not be made a casual member of your own club as this will add them as a member of Orienteering SA.*

It is now very straightforward for people to do this themselves online. A separate document is available on the website to assist them with this. Go to About Orienteering -> Join Now. This is now the preferred way of doing things as it ensures that all details are added. https://sa.orienteering.asn.au/images/gfolder/clubs/Registering-as-a-Casual-Orienteer.pdf

If you wish to **add people to Casuals SA** yourself, you must have admin access to Casuals SA. All club exec should already have this and they can add others.

The minimum you need to register them is their name and year of birth. The email address should be added if known. Other important details such as address and phone number can be added by clicking on edit

Log on to Eventor

- Select Casuals SA from the drop down menu below your name at top right. If it does not appear let me know as it means you do not have access rights. Get one of your club admins to add you or contact me. .
- Click Administration -> Overview. Rather like with your club this shows you all the members of Casuals SA. This is how they should now look when you put them in. Having the red cross next to their Casual designation ensures they don't get any member discount at an event.

Members of Casuals SA

Year: 2020

Create new members   Edit selected members   Export to Excel

	ID	First name	Last name	Gender	Year of birth	Sportident			
☐	15462	Beau		male	2016		✪	Casual	Edit
☐	15457			male	1983		✪	Casual	Edit
☐	15461			male	2014		✪	Casual	Edit
☐	15460			female	1983		✪	Casual	Edit
☐	15463			male	2019		✪	Casual	Edit

- Click Create new members and fill in all fields including Sportident if applicable.. Click Send password so that they get a password. This will only work if they have an email address. If you wish to give them one yourself select Virtual Login from the Club Members menu and go to My Pages -> Edit Profile -> Login

- Click Edit on overview list to add their other details such as address and contact phone number.
- If you wish to process more casuals at the same time just click Add a new member as many times as you wish. Then click Next. If the person is already in the system the following screen appears and you can merge as shown.

- Make sure the details are correct then Click Save.
- They should now appear on the overview list as below

- If you then click Edit you can add or edit other details such as their address and contact numbers. If they were already in the system you may not need to do anything.

EVENT MANAGEMENT

A separate document covering Event Management is available which has been adapted for Orienteering SA. To get a copy go to website and look in
About Us -> Event Management. (Item 15)