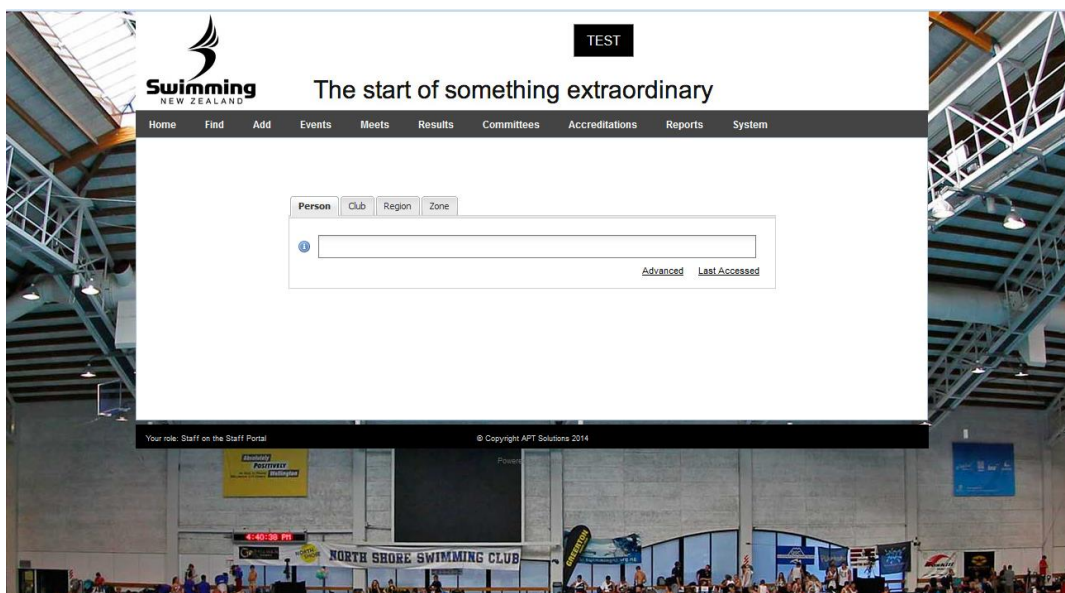


National Database (Stratum) Instructional Document for Regional and Club Administrators

Swimming New Zealand



Welcome to Stratum, the Swimming New Zealand National Database. Once logged into the system using your username and password you can then follow the steps below to update your records, membership details, meets, etc.

Have fun exploring and if you need some extra assistance feel free to contact info@swimmingnz.org.nz, where your details will be passed to the appropriate person and they will contact you back to help.

Please note that this document is a work in progress while new features are added over the next 18 months.

*Last updated 6 June 2014
Version 1.3*



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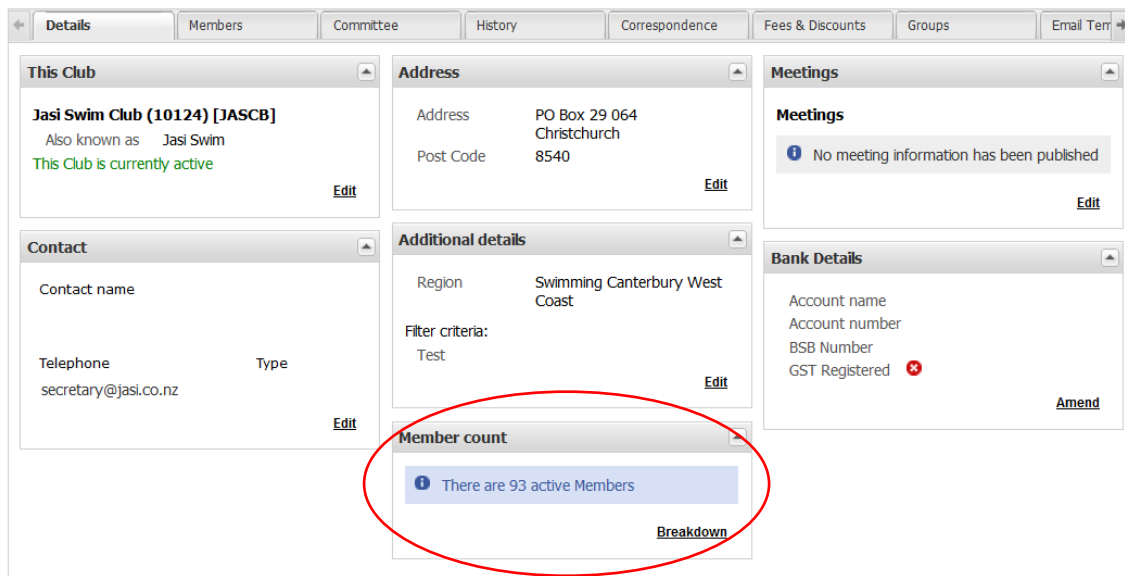
MEMBERSHIPS

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

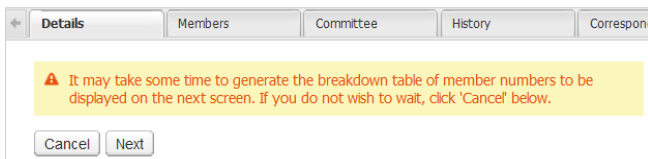
Click the Club tab and begin typing the name of your club. Select your club from the drop down list.



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



Click Next



You then get three tabs to take details from.

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?

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

The screenshot shows the Swimming New Zealand website interface. At the top left is the logo for Swimming New Zealand with the tagline "The start of something extraordinary". Below the logo is a dark navigation bar with the following menu items: Home, Find, Add, Events, Meets, Results, Committees, Accreditations, Reports, and System. In the center of the page, there is a search filter interface with four tabs: "Person", "Club", "Region", and "Zone". The "Club" tab is highlighted with a red circle. Below the tabs is a search input field with a blue information icon on the left and "Advanced" and "Last Accessed" links on the right. At the bottom of the page, there is a footer with the text "Your role: Staff on the Staff Portal" and "© Copyright APT Solutions 2014".

Select the **Members** tab

Member No.	Forenames	Surname	Membership Type	Status	Approved
[REDACTED]	E	R	Competitive Swimmer	Active	Approved
[REDACTED]	J	R	Administrator	Active	Approved
[REDACTED]	S	R	Competitive Swimmer	Active	Approved
[REDACTED]	F	B	Coach	Active	Approved
[REDACTED]	M	T	Competitive Swimmer	Active	Approved
[REDACTED]	E	R	Competitive Swimmer	Active	Approved
[REDACTED]	J	B	Administrator	Active	Approved
[REDACTED]	H	C	Competitive Swimmer	Active	Approved
[REDACTED]	J	R	Coach	Active	Approved
[REDACTED]	J	J	Competitive Swimmer	Active	Approved
[REDACTED]	K	V	Administrator	Active	Approved
[REDACTED]	E	H	Competitive Swimmer	Active	Approved
[REDACTED]	F	R	Non-Voting Technic...	Active	Approved
[REDACTED]	P	C	Competitive Swimmer	Active	Approved
[REDACTED]	J	G	Administrator	Active	Approved
[REDACTED]	A	B	Competitive Swimmer	Active	Approved
[REDACTED]	J	B	Competitive Swimmer	Active	Approved
[REDACTED]	F	A	Competitive Swimmer	Active	Approved
[REDACTED]	S	H	Competitive Swimmer	Active	Approved
[REDACTED]	S	P	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.

Member No.	Forenames	Surname	Membership Type	Status	Approved
[REDACTED]	E	R	Competitive Swimmer	Active	Approved
[REDACTED]	J	R	Administrator	Active	Approved
[REDACTED]	S	R	Competitive Swimmer	Active	Approved
[REDACTED]	F	B	Coach	Active	Approved
[REDACTED]	M	T	Competitive Swimmer	Active	Approved

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

[REDACTED]	S	H	Competitive Swimmer	Active	Approved
[REDACTED]	S	P	Competitive Swimmer	Active	Approved

Page 1 of 8 | 1 - 20 of 147 | Per page 20

Show active Members Show approved Members Show pending Members Show incomplete Members Show lapsed Members

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

[REDACTED]	S	H	Competitive Swimmer	Active	Approved
[REDACTED]	S	P	Competitive Swimmer	Active	Approved

Page 1 of 8 | 1 - 20 of 147 | Per page 20 | csv [Download]

Show active Members Show approved Members Show pending Members Show incomplete Members Show lapsed Members

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

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: Personal [REDACTED]

Log [REDACTED] [Send quick email](#)

Type: Telephone [REDACTED]

Mobile [REDACTED]

[Log incoming call](#) [Log outgoing call](#)

[Edit contact details](#)

Club

[Jasi Swim Club](#)
PO Box 29 064
Christchurch
8540

[Select](#)

Secondary Club

[Select](#)

Region

[Swimming Canterbury West Coast \(code: 3\)](#)
(normally derived from Club)

Approved Member Status

Approved

[Edit](#)

Personal Address

Address [REDACTED]

Post Code [REDACTED]

[Edit](#)

Subscriptions

Type	Competitive Swimmer
Pay Method	Cheque / Cash
Paid By	
Description	Value
Club subscriptions	
Region / State / National	0.00
Total	0.00

Subs due today 0.00

Total due 0.00

Discount

Discounted Amount 0.00

[Manual pay](#) [Pay Now](#) [Transactions](#) [Edit](#)

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

[Return to main screen](#)

Mailname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
Miss E A Rennell	Competitive	358480	1A5RFA060598	06/05/1998	16	17/07/2011	Unknown, Non	Approved

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

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](#)

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]	Administrator	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved

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

[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Administrator	Inactive	Approved
[Redacted]	[Redacted]	[Redacted]	Coach	Active	Approved

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

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.

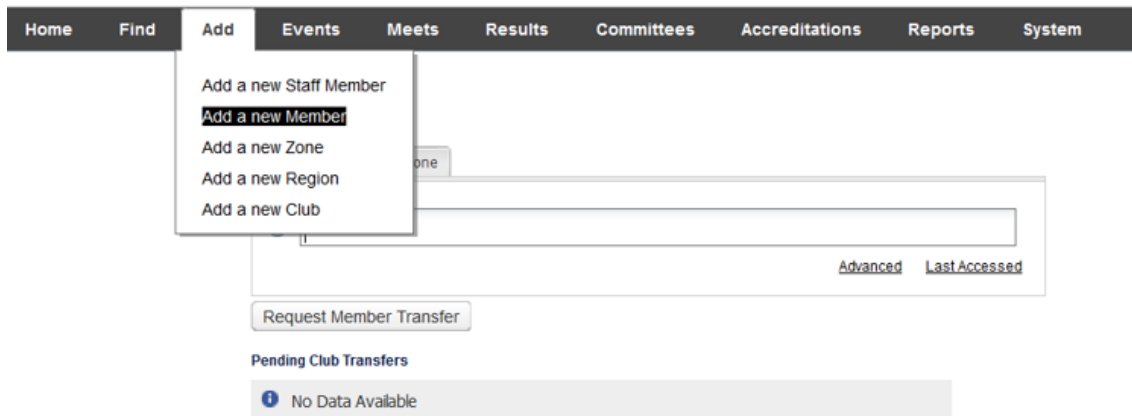


The following fields will be automatically downloaded in the export:

- 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?

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



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

Home Find Add Events Meets Results Committees Accreditations Reports System

Add a Member

Club
Capital Swim Club (10041)

Personal details

* Title

* Surname

* Forenames

* Date of birth

* Gender

Address

* Address

* Suburb

* City

* Postcode

Save

Your role: Administrator on the Club Committee Members at Capital Swim Club © Copyright APT Solutions 2014

Please 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.*

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

Your role: Administrator on the Club Committee Members at Capital Swim Club © Copyright APT Solutions 2014

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 Beckl 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

Your role: Administrator on the Club Committee Members at Capital Swim Club © Copyright APT Solutions 2014

From here you can go into Add Family Member or Make Payment but these are features still to be added. 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: Personal
Email addresses: [REDACTED]

[Log received email](#) [Send quick email](#)

Type: Telephone [REDACTED]
Mobile: [REDACTED]

[Log incoming call](#) [Log outgoing call](#)

[Edit contact details](#)

Club

[Jasi Swim Club](#)
PO Box 29 064
Christchurch
8540

[Select](#)

Secondary Club

[Select](#)

Approved Member Status

Approved

[Edit](#)

Subscriptions

Type: Competitive Swimmer
Pay Method: Cheque / Cash
Paid By:

Description	Value
Club subscriptions	
Region / State / National	0.00
Total	0.00

Subs due today: 0.00
Total due: 0.00
Discount: [REDACTED]
Discounted: 0.00

Personal Address

Address: [REDACTED]

Region

[Swimming Canterbury West Coast \(code: 3\)](#)
(normally derived from Club)

How do I request a member transfer to my club?

Select Request Members Transfer button.

**Please 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.*

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

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

Enter the members Member Number and Surname, click Next.

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	<input type="text"/>	!
* Surname	<input type="text"/>	!

Cancel Next

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

Member's Details

Member	3	
Name	M	
DOB	1	
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	<input type="text"/>	!
Status	Pending	

Back Save

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

New Subscription

Back Save

✓ The details have been updated

Return

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

Person Club Region Zone

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 link members together as families?

In the Person tab..



The start of something extraordinary

Home Find Add Events Meets Results Committees Accreditations Reports System

Person Club Region Zone

Advanced Last Accessed

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

Person Club Region Zone

erk

Mrs Becki Erkens [944856 - Administrator] | 10

Advanced Last Accessed

Click the member you wish to add to a family group to bring up their details. On the 'Profile' tab, you can view any existing relationships which exist in the system already.

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

Personal | **Profile** | Events & Meets | Accreditation | Correspondence | History | Biometrics

This person

Mrs Becki Erkens (944856)

[Your settings](#) [Personal details](#)

[Remove from Card run](#) [Add to Basket](#)

Group List

[Edit](#)

Interests

There are no Interests recorded

[Edit](#)

Mailing Preferences

Optional mail

External mail

Allow Phone?

Allow Email?

Allow SMS?

Email lists

There are no Email lists recorded

[Edit](#)

Relationships

- Relationships
- Staff (Club)

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

Personal | Profile | Events & Meets | Accreditation | Correspondence | History | Biometrics

This person

Mrs Becki Erkens (944856)

[Your settings](#) [Personal details](#)

[Remove from Card run](#) [Add to Basket](#)

Web Access

Web User Id **Becki**

Password *********

[Edit](#)

Club

[Staff](#)

[Select](#)

Secondary Club

[Select](#)

Region

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

Status

Record 944856 is currently active

[Lapse](#)

Approved Member Status

Approved

[Edit](#)

Subscriptions

Type	Staff
Pay Method	None Required
Paid By	
Description	Value
Club subscriptions	
Region / State / National	0.00
Total	0.00
Subs due today	0.00
Total due	0.00
Discount	
Discounted Amount	0.00

[Pay Now](#) [Transactions](#) [Edit](#)

[Manual pay](#)

Emergency contact

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

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.>

In the Person tab..



Person Club Region Zone

Advanced Last Accessed

Your role: Staff on the Staff Portal © Copyright APT Solutions 2014

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

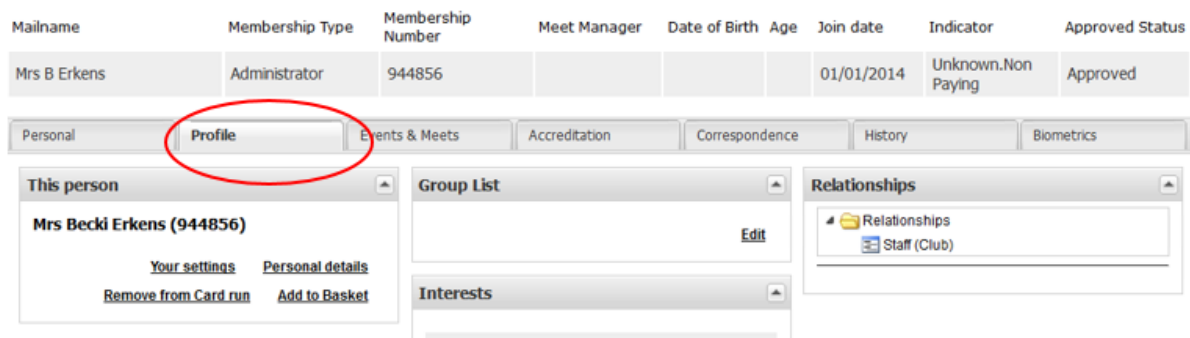
Person Club Region Zone

erk

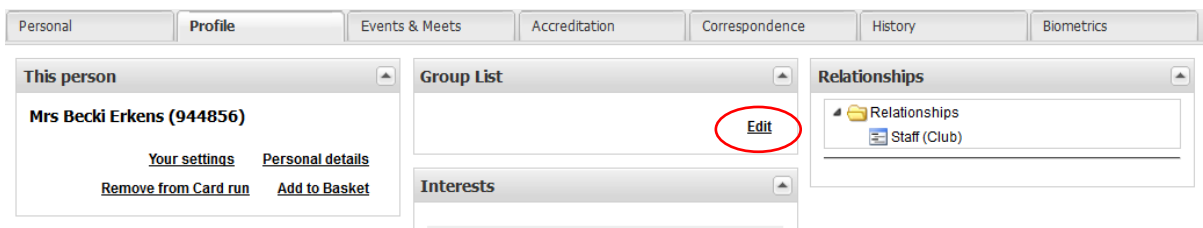
Mrs Becki Erkens [944856 - Administrator] | 10

Advanced Last Accessed

Click on the Profile tab.



Click on the Edit button in the Group List section.



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 person's 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 manually approved by the club Registrar to indicate their membership application has been accepted by the club.

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



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.

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

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?

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


Select Fees & Discounts.

←	Details	Members	Committee	History	Correspondence	Fees & Discounts
---	---------	---------	-----------	---------	----------------	-----------------------------

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

Discount Packages

 No Data Available

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 Member 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.

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

Renew as a different type (optional)

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

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.

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](#)

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

CSV

Add

Discount Packages

No Data Available

Add

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

Annual Fee

* Member type:

Description:

Region Member type:

Member type:

Sub-total: 0.00

Valid - new members:

Valid - reinstatement:

Obsolete:

Period covered: 01/07/2013 to 30/06/2014

Annual sub:

Total this level: 0.00

Parameters for junior fee type (optional)

Lower age limit:

Upper age limit:

Next Age Change to:

Renew as a different type (optional)

Renew As:

Cancel Save Recalculate

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.

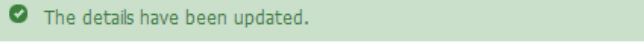
Annual Fee

* Member type:

Description:

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

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.

[Return](#)

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 do I approve a member transfer?

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.


Person Club Region Zone

[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](#) 

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

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](#)

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 Terr →

Pending Members

Member No.	Forenames	Surname ▲	Membership Type	Status	Approved
[REDACTED]	[REDACTED]	[REDACTED]	Club Swimmer	Active	<input checked="" type="checkbox"/> Pending

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

Approved Member Status

Pending Approval

Approval pending

Or click into the Member's profile (by clicking on the Member No.) and on the Personal tab, select Edit on the Approved Member Status section

The screenshot shows a member's profile page with several tabs: Personal, Profile, Events & Meets, Accreditation, Correspondence, History, and Biometrics. The 'Personal' tab is selected. The page is divided into several sections: 'This person' (Mr G [redacted]), 'Web Access' (Web User Id [Not set], Password [Not set]), 'Status' (Record [redacted] is currently active), 'Contacts' (Personal, Work), 'Club' (Jasi Swim Club, PO Box 29 064, Christchurch, 8540), 'Approved Member Status' (Pending), and 'Subscriptions'. The 'Approved Member Status' section is circled in red, and an 'Edit' button is visible next to it.

Untick the Approval pending box then click on Save.

Approved Member Status

Pending Approval

Approval pending

You will receive the following confirmation message.



MEETS

How do I set up a meet?

Click the Meets tab and select Create A New Meet

The screenshot shows the Swimming New Zealand website. The logo is "Swimming NEW ZEALAND" with the tagline "The start of somet". The navigation menu includes Home, Find, Add, Events, Meets, Results, and Co. The 'Meets' tab is selected, and a dropdown menu is open with the following options: Create a New Meet, Search for a Meet, List of Meets, List of Old Meets, and Manage Venues. Below the menu, there is a "Manage Venue" section with a "Select Venue" dropdown and a "Venue" input field.

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.

Create a new Meet

* Title	<input type="text" value="Test"/>
Copy from...	<input type="text"/>

Security

 Your current active role is National

Save

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).

Complete each of the fields on the Main Details screen.

Main details

* Title	<input type="text" value="Test"/>
---------	-----------------------------------

Dates

* Meet Date From	<input type="text" value="dd/mm/yyyy"/>
* Meet Date To	<input type="text" value="dd/mm/yyyy"/>
Entry Start Date	<input type="text" value="dd/mm/yyyy"/>
Entry Start Time	<input type="text" value="hh:mm:ss"/>
Entry End Date	<input type="text" value="dd/mm/yyyy"/>
Entry End Time	<input type="text" value="hh:mm:ss"/>
Time Zone	<input type="text"/>

Venue

Venue	<input type="text"/>
-------	----------------------

Meet Contact

Organiser	<input type="text"/>
Organiser's email	<input type="text"/>

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.

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'.

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

If you would like this meet to display in your website calendar, click Edit and change Show in Web Calendar to Yes, then Save.

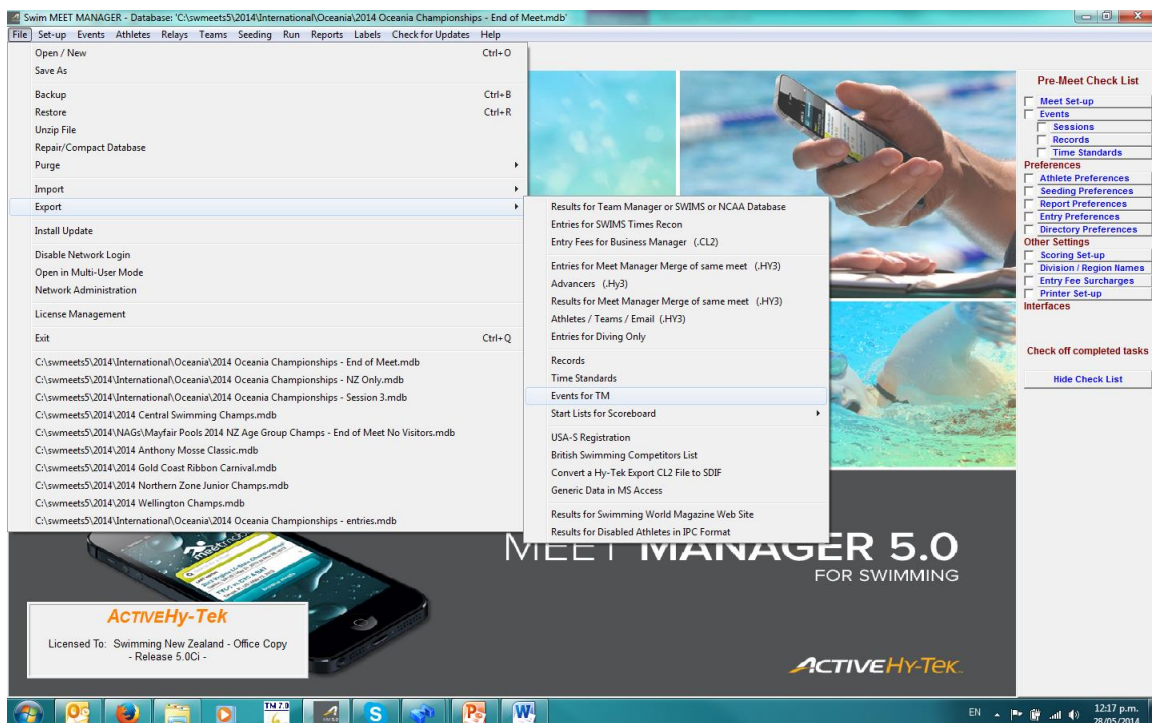
Dates

* From Date	<input type="text" value="22/05/2014"/>
* To Date	<input type="text" value="22/05/2014"/>
Entry Start Date	<input type="text" value="dd/mm/yyyy"/>
Entry Start Time	<input type="text" value="hh:mm:ss"/>
Entry End Date	<input type="text" value="dd/mm/yyyy"/>
Entry End Time	<input type="text" value="hh:mm:ss"/>
Time Zone	<input type="text"/>
Show in web calendar	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow web booking	<input type="radio"/> Yes <input type="radio"/> No

From here you can follow the instructions on how to set up a meet to accept Online Entries (**only available once the CMS is in place**).

How do I export events from Meet Manager to upload into the database?

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



Create your basic meet, as outlined in [How do I set up a meet in ClubLANE?](#). Once your meet is created, click the Meet Manager tab then select the 'Import from Meet Manager button'.

The screenshot shows a web interface with several tabs: Details, Settings, **Meet Manager**, Competitors, Fees, Web display, and Competitive Events. Below the tabs, there are three informational messages, each followed by a button:

- Message 1: "In order to import the details of the meet from Meet Manager click on the button below, select the MM file and it will be uploaded." followed by the "Import from Meet Manager" button.
- Message 2: "In order to export the entries to Meet Manager click on the button below." followed by the "Export Entries to Meet Manager" button.
- Message 3: "In order to import the results from Meet Manager click on the button below." followed by the "Import Results from Meet Manager" and "Review Results" buttons.

You can import the Meet Manager 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 Events Zip file on your computer and drag it into the Drag Files Here box

Upload Swimming Event

The screenshot shows the "Upload Swimming Event" interface. It features a "Select Meet File" section with the instruction "Add file to the upload queue and click the start button." Below this is a large "Drag files here." area. At the bottom of the file selection area are two buttons: "Add File" and "Start Upload".

Below the file selection area, there are several form fields:

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

A checkbox is present with the text: ***** Please ensure this is the correct file

At the bottom, there are two buttons: "Back" and "Submit".

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 they are all 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

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.

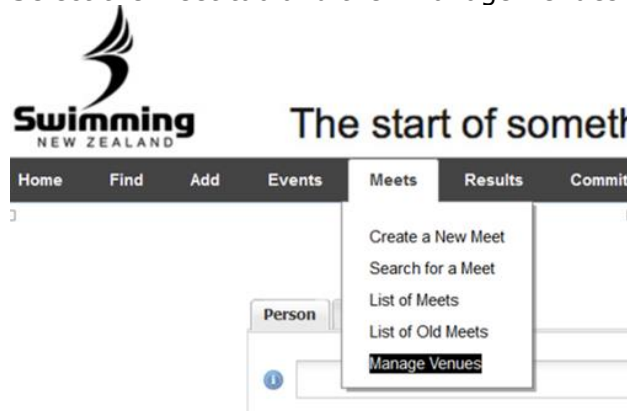
Number	Gender	Age From	Age To	Stroke	Distance	Relay	Type
1	Men	0	109	Butterfly	50 metre		
2	Women	0	109	Butterfly	50 metre		
3	Men	9	99	Backstroke	50 metre		
4	Women	9	99	Backstroke	50 metre		
5	Boys	11	11	Freestyle	50 metre		
6	Girls	11	11	Freestyle	50 metre		
7	Boys	12	12	Backstroke	50 metre		
8	Girls	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		

Page of 5

VENUES

How do I create a new venue?

Select the Meet tab and then Manage Venues on the top tabbing row.



Select the New Venue button.

Manage Venue

Select Venue

Venue

Complete all text fields in Venue details and select Save.

Venue Details

Name

Name

* Address

* Suburb

* City

* Postcode

Contact Details

Telephone
Fax
Email
WWW URL

Other Details

Use again
Contact Name

Security

⚠ Your current active role is National

You will receive the following confirmation screen upon completion.

The screenshot shows the Swimming New Zealand website interface. At the top left is the logo for Swimming New Zealand. To its right is a navigation menu with items: Home, Find, Add, Events, Meets, Results, Committees, Accreditations, Reports, and System. A dark navigation bar contains the text 'The start of something extraordinary'. In the top right corner, there is a 'TEST' button and a search input field. Below the navigation bar, a green message box states 'A new Venue has been created...'. Underneath, a 'Venue detail' section displays the following information:

Venue name	Test
Address	3 test grove upper hutt wellington
Postcode	5028
Ref	000087

Below the table is a 'Manage Venue' button. At the bottom of the page, a footer contains the text 'Your role: Staff on the Staff Portal' and '© Copyright APT Solutions 2014'.

GENERAL ADMINISTRATION

What do the committee roles mean?

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.

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:

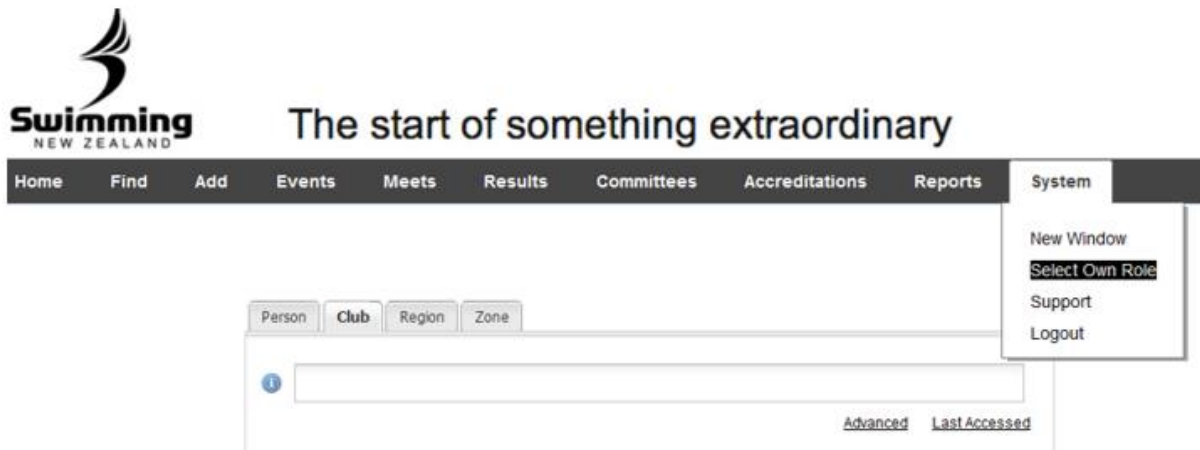
The screenshot shows a 'Select a Role' dialog box with the following options:

- Treasurer on the Club Committee Members at [redacted]
- Region Administrator on the Region Committee Members at [redacted]
- Don't ask me this again

At the bottom of the dialog box is a 'Continue' button.

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

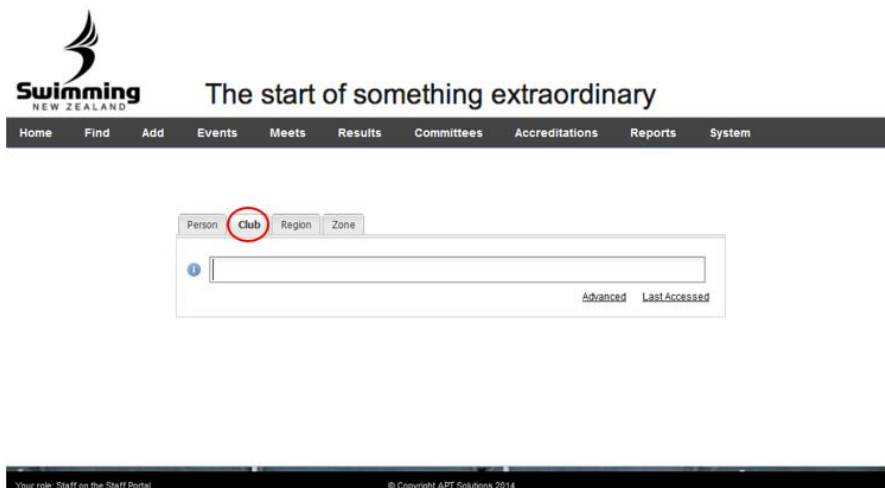
Once logged in you can change your active role by selecting the System tab from the menu items and then Select Current Role. You will be presented with the same Select a Role screen as when you log in, where you can select which role you now wish to assume.



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

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.

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



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

The screenshot shows a web interface with a navigation bar at the top containing tabs for 'Details', 'Members', 'Committee', 'History', and 'Correspondence'. The 'Committee' tab is selected. Below the navigation bar is the heading 'Activity List'. Underneath, there are several sections, each representing a committee role: 'Administrator', 'Club Contact', 'Secretary', 'Treasurer', 'Registrar', and 'Race Secretary'. Each section contains an 'Edit' button and a message box with an information icon and the text 'Role there is no current postholder'.

Select the Edit button and then 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 for 'Details', 'Members', 'Committee', 'History', and 'Correspondence'. The 'Committee' tab is selected. Below the navigation bar is the heading 'Administrator: add or remove postholders'. Underneath, there is a paragraph of text: '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 text is a message box with an information icon and the text 'There is no current Administrator'. Underneath is the heading 'New postholders'. Below this heading is a form with a message box containing the text 'Find the new postholder by typing in the field below.' The form has three fields: 'Name/Number' with an 'Add' button below it, 'Start Date' with a date picker showing '20/05/2014', and 'End Date' with a date picker showing 'dd/mm/yyyy'. At the bottom of the form are 'Cancel' and 'Next' buttons.

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.

You will receive the following confirmation screen upon completion.

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

How do I edit members' usernames and passwords?

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

Person Club Region Zone

erk

Mrs Becki Erkens [944856 - Administrator] | 10

Advanced Last Accessed

Once you find the member their details will appear.

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

Personal Profile Events & Meets Accreditation Correspondence History Biometrics

This person

Mrs Becki Erkens (944856)

Your settings Personal details

Remove from Card run Add to Basket

Contacts

No email addresses set

Log received email Send quick email

No phone numbers set

Web Access

Web User Id Becki

Password *****

Edit

Status

Record 944856 is currently active

Lapse

Club

Staff

Select

Secondary Club

Approved Member Status

Approved

Edit

Subscriptions

Type Staff

Pav Method None Required

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)

If you wish to retain the current Username shown below, copy it into the 'Confirm Username' field. To set a new Username, enter that in both fields.

Username

Confirm Username

To set a new Password, enter it in both fields (leave blank to retain the user's current password)

Password

Confirm Password

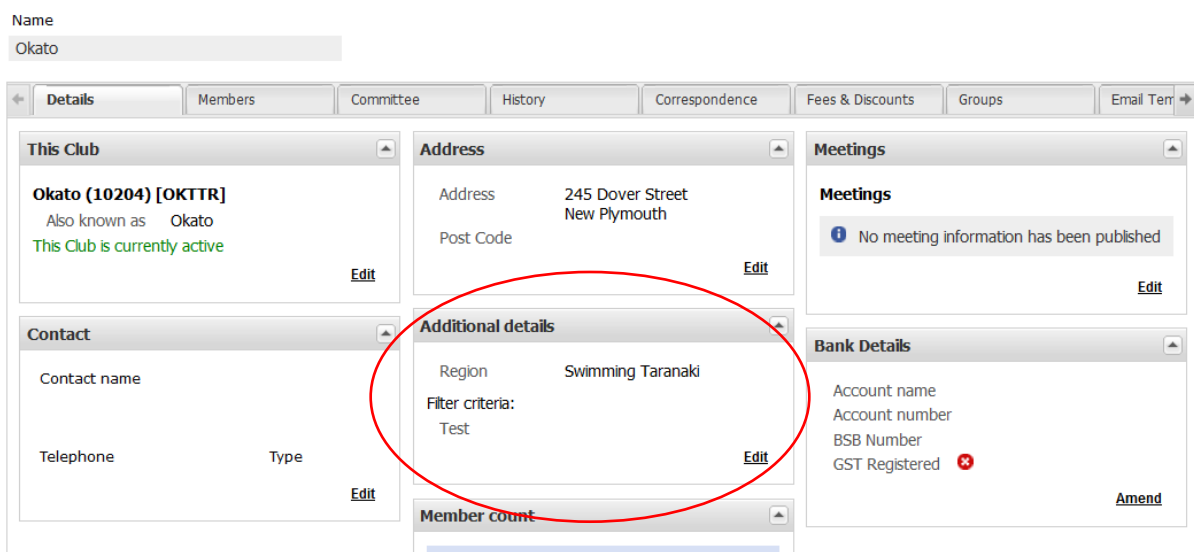
Cancel Set Web access details

How do I check if I am aligned to the correct region?

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



On the **Details** tab you can view which region/area you are currently aligned to by looking in the **Additional details** box found in the centre of the screen under the Address section.



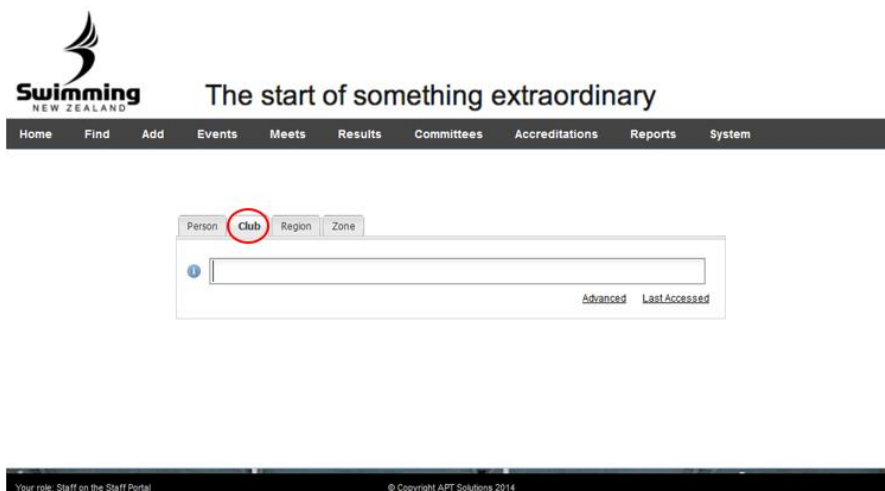
If you are not in the correct Region, please contact your Regional Administrator for this to be updated.

FINANCE

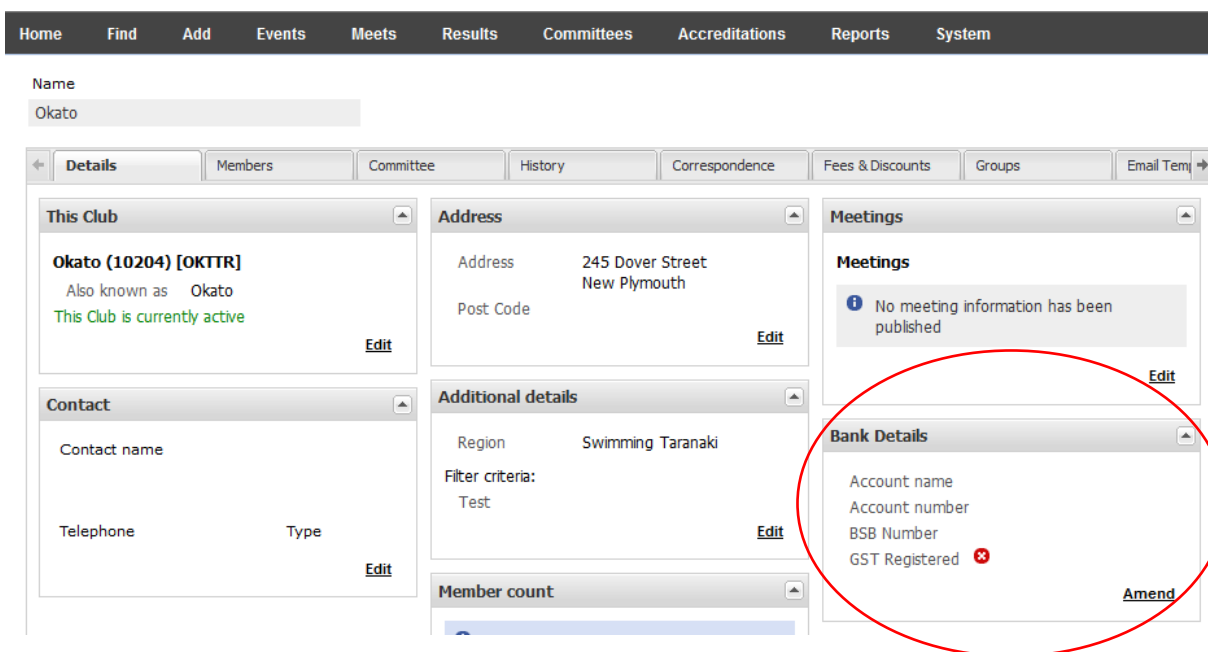
How do I set up my banking details and GST preference?

It is important that clubs enter their club's bank details, in order for all fees from online memberships 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.

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



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'.



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.

The screenshot shows a web application interface. At the top is a dark navigation bar with links: Home, Find, Add, Events, Meets, Results, and Committee. Below this is a search bar with the text 'Name' and 'Okato'. A secondary navigation bar contains tabs: Details (selected), Members, Committee, and History. The main content area is titled 'Current Banking Details' and lists: Account name, Account number, BSB Number, and GST Registered (with a red 'x' icon). Below this is the 'New Banking Details' section with four fields: '* Account Name' (with a red border and warning icon), '* Account Number', '* BSB Number', and '* GST Registered' (with a dropdown arrow). At the bottom are 'Cancel' and 'Save' buttons.

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

How do I approve my club banking details and GST preference?

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.

If you are seeing the below 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

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

Select Amend under the Bank Details section.

Home Find Add Events Meets Results Committees Accreditations Reports System

Name
Okato

Details Members Committee History Correspondence Fees & Discounts Groups Email Temp

This Club
Okato (10204) [OKTTR]
Also known as Okato
This Club is currently active
[Edit](#)

Address
Address 245 Dover Street
New Plymouth
Post Code
[Edit](#)

Meetings
Meetings
No meeting information has been published
[Edit](#)

Contact
Contact name
Telephone Type
[Edit](#)

Additional details
Region Swimming Taranaki
Filter criteria:
Test
[Edit](#)

Member count

Bank Details
Account name
Account number
BSB Number
GST Registered **⊗**
[Amend](#)

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

GST Registered
Requested By
Requested on 28/11/2013

Cancel **Approve** Reject

Your clubs bank details will now show on the Details.



The image shows a screenshot of a web form titled "Bank Details". The form contains four input fields: "Account name", "Account number", "BSB Number", and "GST Registered". Each field is followed by a series of small, light-colored rectangular boxes, likely representing a character limit or a visual indicator of the input length. At the bottom right of the form, there is a button labeled "Amend".

How can I offer family memberships?

In order for your members to be able to pay for multiple members in one single transaction (i.e. a family membership), the following **MUST** be set up:

1. All members of a family are linked together
2. Create club-specific single membership types (if applicable)
3. Setup Club membership fees into the database

The database will pick up on what each linked family member's member type is when processing the transaction. The total transaction charge for linked members will be the total sum of applicable membership fees (Swimming New Zealand, Swimming Region and your club fees).

An added benefit to linking members within their family is that clubs now have the ability to offer discounts on their club fee for families, through the form of Discount Packages. These packages will automatically display a discounted amount that a family of a specific combination will pay when their family's *primary member* logs in to renew.