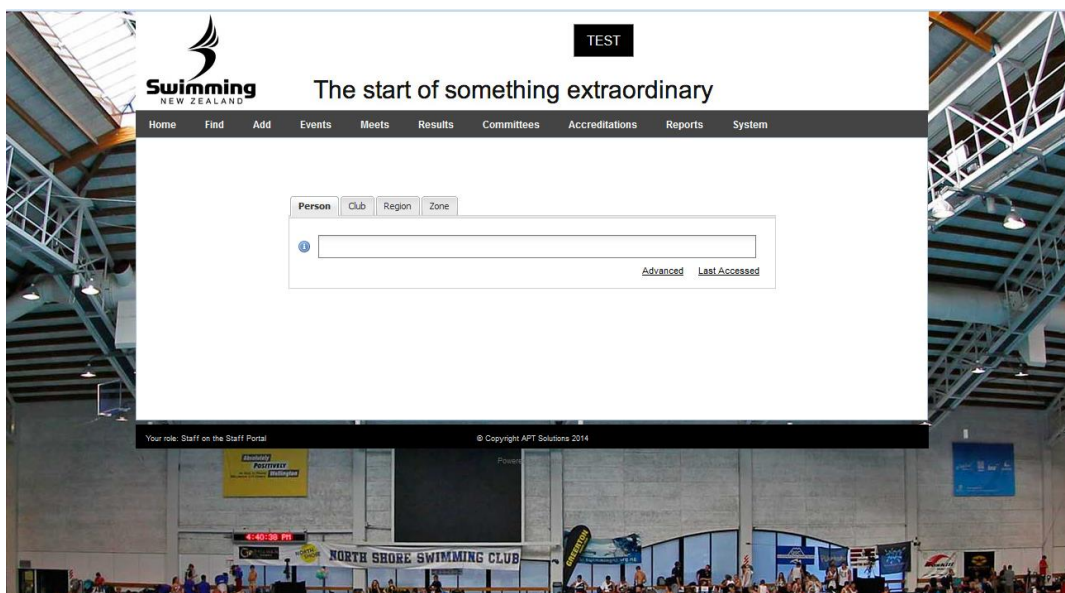# National Database (Stratum) Instructional Document for Regional and Club Administrators

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
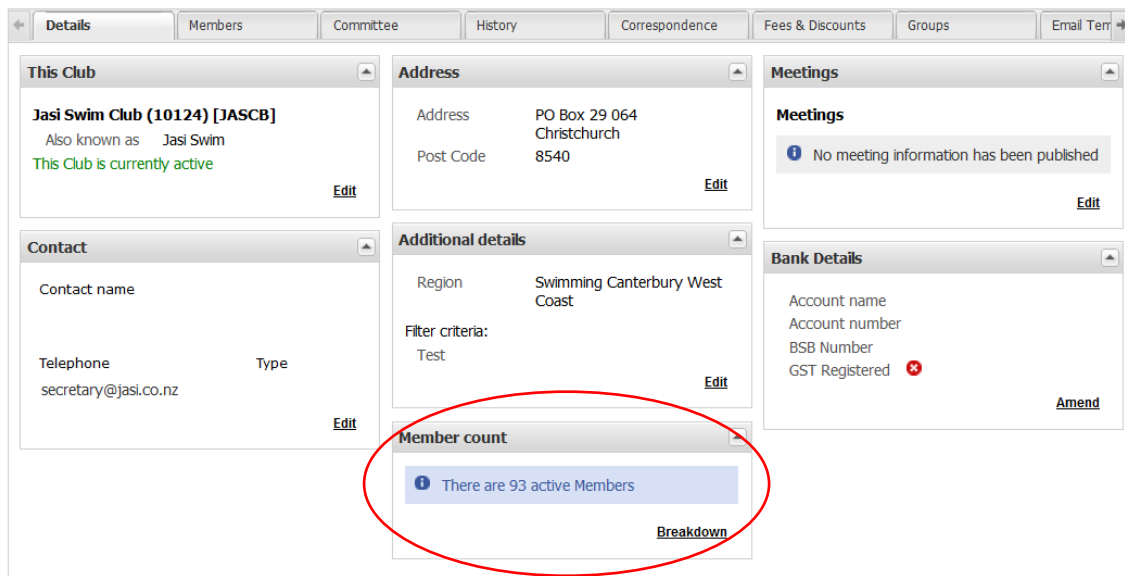*Version 1.3*

Table of Contents

MEMBERSHIPS

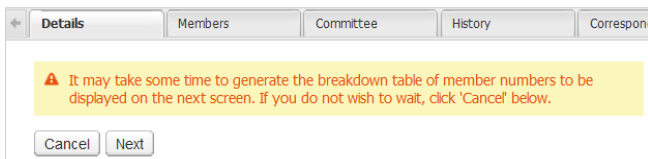## How do I view a summary of my club's memberships?

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

Tabs: Gender | **Membership Type** | Payment method

Return

Code	Description	Count
C	Cheque / Cash	93
	Total	93

Tabs: Gender | Membership Type | **Payment method**

Return

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

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

Select the Members tab

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.

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.

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.

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?

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

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

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

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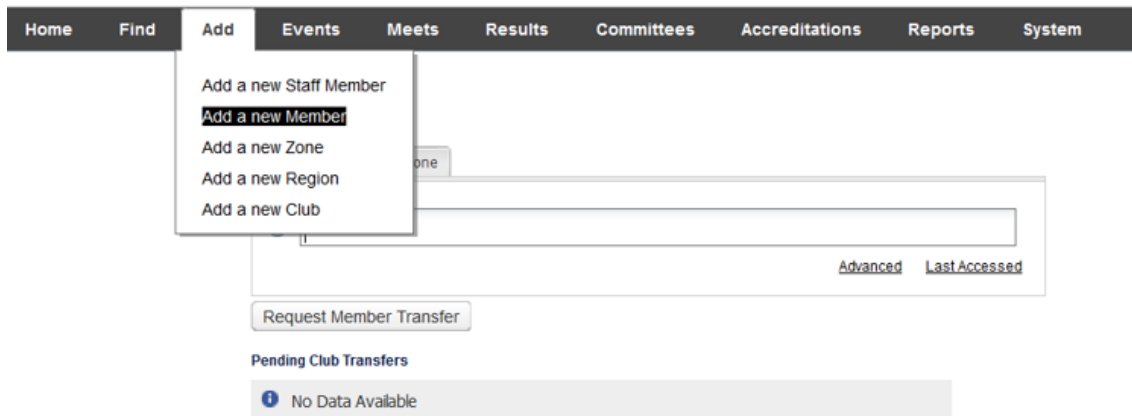
Enter in all required fields and then select the Next button.

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]

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 are features still to be added. Edit Member will take you into the new member's profile.

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.

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]

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

| Home | **Find** | Add | Events | Meets | Results | Committees | Accreditations | Reports | System |

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 | ⓘ | [   ] |
| Status | | Pending |

[Back] [Save]

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

[   ]

[Back] [Save]

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

How do I link members together as families?

In the Person tab..

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

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.

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

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.

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..

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

Click on the Profile tab.
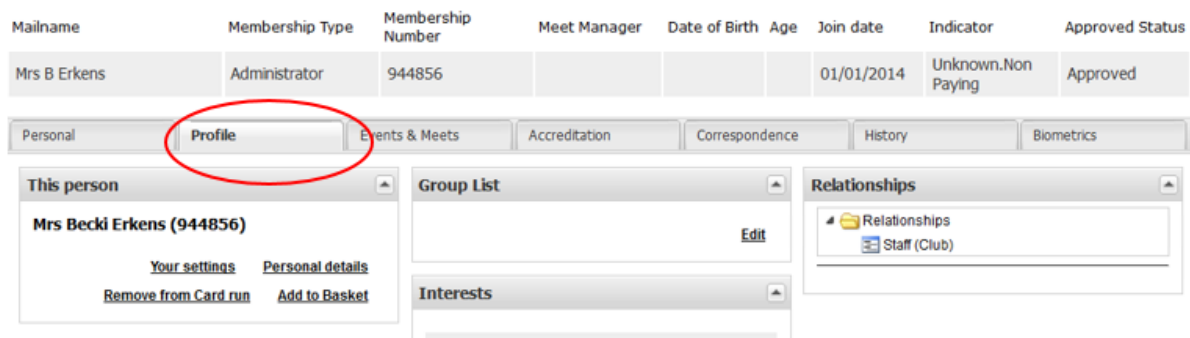
Click on the Edit button in the Group List section.
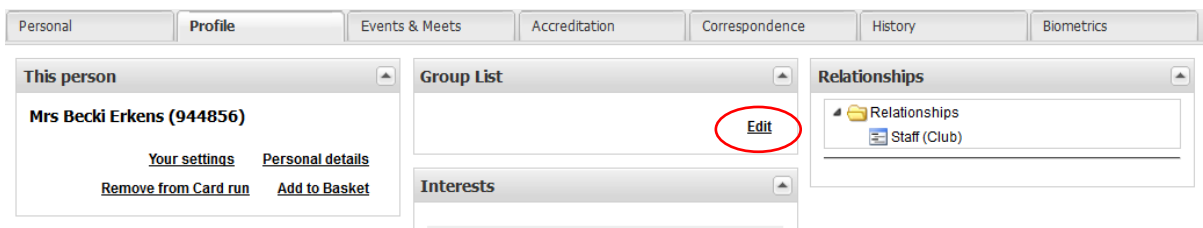
Tick the group you want to add the member into, then Save.

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.

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

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

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	

Add

Discount Packages

ℹ No Data Available

Add

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		ⓘ
Description		
Region Member type	▼	
Member type	▼	
Sub-total	0.00	
Valid - new members	☐	
Valid - reinstatement	☐	
Obsolete	☐	
Period covered	to 30/12/1968	
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

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] **Ok**ato
Swimming Taranaki | Star rating
Club   Advanced   Last Accessed

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

	Details	Members	Committee	History	Correspondence	Fees & Discounts	Groups	Email Tem

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	Club Swimmer
Description	
Region Member type	Club Swimmer
Member type	Club Swimmer
Sub-total	0.00
Valid - new members	☑
Valid - reinstatement	☐
Obsolete	☐
Period covered	01/07/2013 to 30/06/2014
Annual sub	0
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.
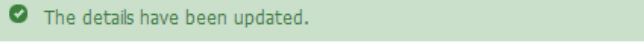

Annual Fee

* Member type	Club Swimmer
Description	

20

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.

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.

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

Approved Member Status

Pending Approval

Approval pending ☐

Cancel | Save

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

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

This person

Mr G███████ (██████)

Add to Basket Personal details
Remove from Card run

Web Access

Web User Id   [Not set]
Password   [Not set]

Edit

Status

✓ Record ████ is currently active

Lapse

Contacts

Type	Email addresses
Personal	██████████
Work	██████████

Club

Jasi Swim Club
PO Box 29 064
Christchurch
8540

Select

Approved Member Status

Pending

Edit

Subscriptions

Untick the Approval pending box then click on Save.

Approved Member Status

Pending Approval

Approval pending ☐

Cancel | Save

You will receive the following confirmation message.

✓ The details have been updated.

MEETS

How do I set up a meet?

Click the Meets tab and select Create A New Meet

Swimming NEW ZEALAND   The start of somet

| Home | Find | Add | Events | Meets | Results | Co |

Manage Venue

Select Venue

Venue ℹ

Create a New Meet
Search for a Meet
List of Meets
List of Old Meets
Manage Venues

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 | Test |
| Copy from... ⓘ | |

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 | Test |

Dates

* Meet Date From	dd/mm/yyyy
* Meet Date To	dd/mm/yyyy
Entry Start Date	dd/mm/yyyy
Entry Start Time	hh:mm:ss
Entry End Date	dd/mm/yyyy
Entry End Time	hh:mm:ss
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.

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

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

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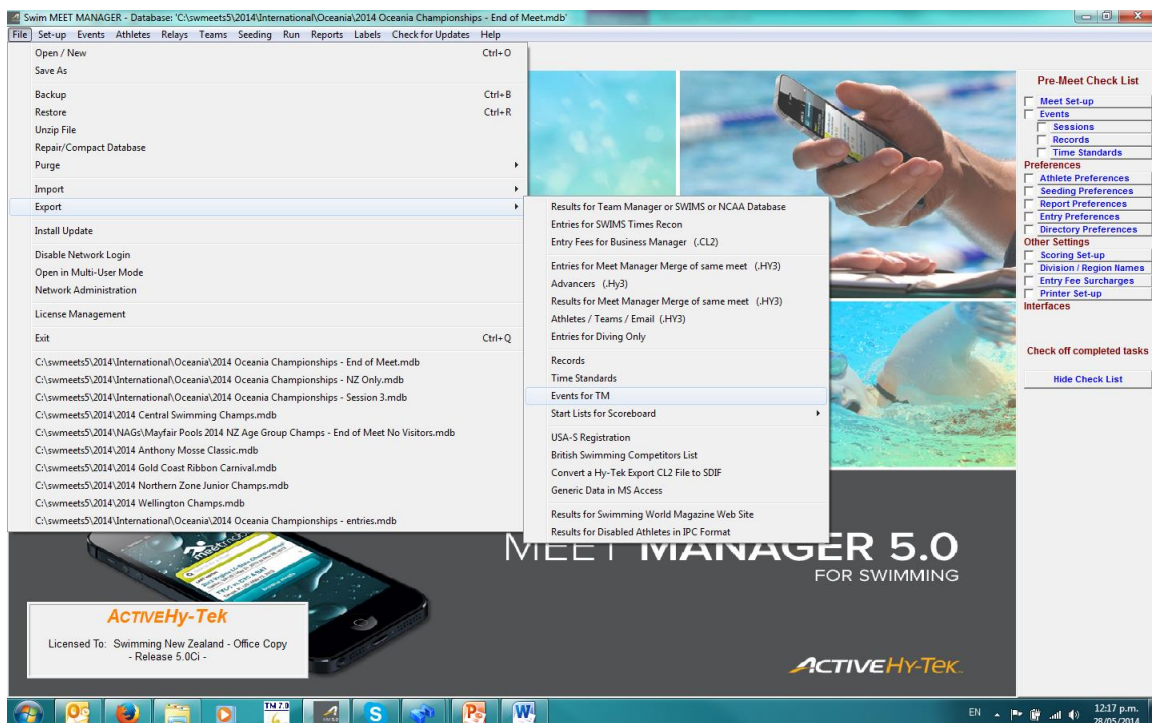

From here you can follow the instructions on how to set up a meet to accept Online Entries **(only available once the CMS is in place).**

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 <u>How do I set up a meet in ClubLANE?</u>. Once your meet is created, click the Meet Manager tab then select the 'Import from Meet Manager button'.

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

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 ✓

⊕ 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

Back Submit

Select the Competitive Events tab to review the Meet Events you have just uploaded.

| Details | Settings | Meet Manager | Competitors | Fees | Web display | **Competitive Events** | Notes | Ope |

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 1 of 5 | ▶ ▶▶ | ⟳ |

VENUES

How do I create a new venue?

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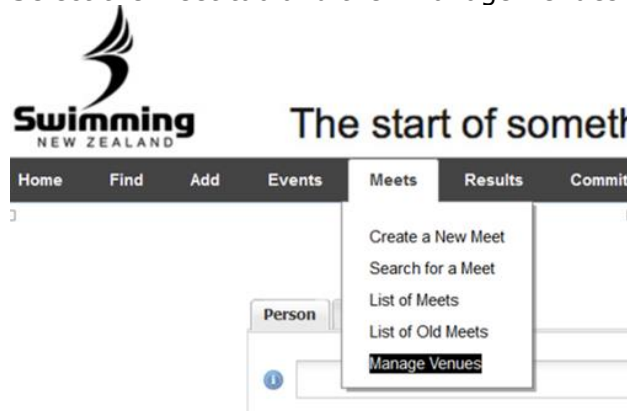
Select the New Venue button.

Complete all text fields in Venue details and select Save.

You will receive the following confirmation screen upon completion.

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.

<u>Selecting your active role</u>

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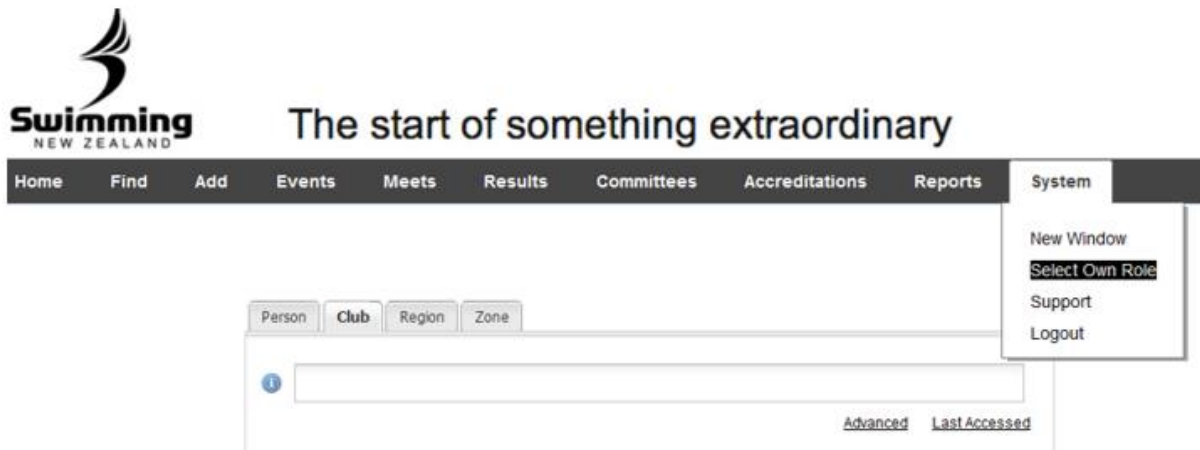
Committee members will need to select which role they wish to act as before being taken to that particular console.

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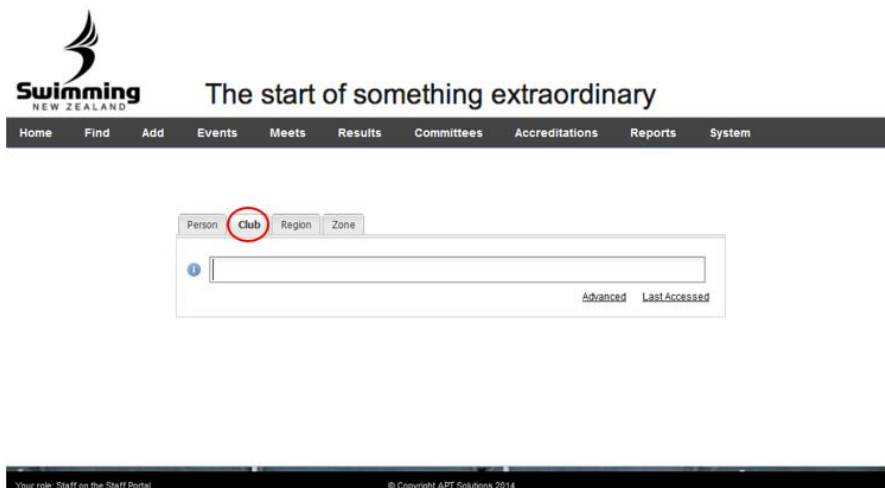
Select the Committee tab. This screen will allow you to view and edit the details currently recorded in the system.

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 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

Once you find the member their details will appear.

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

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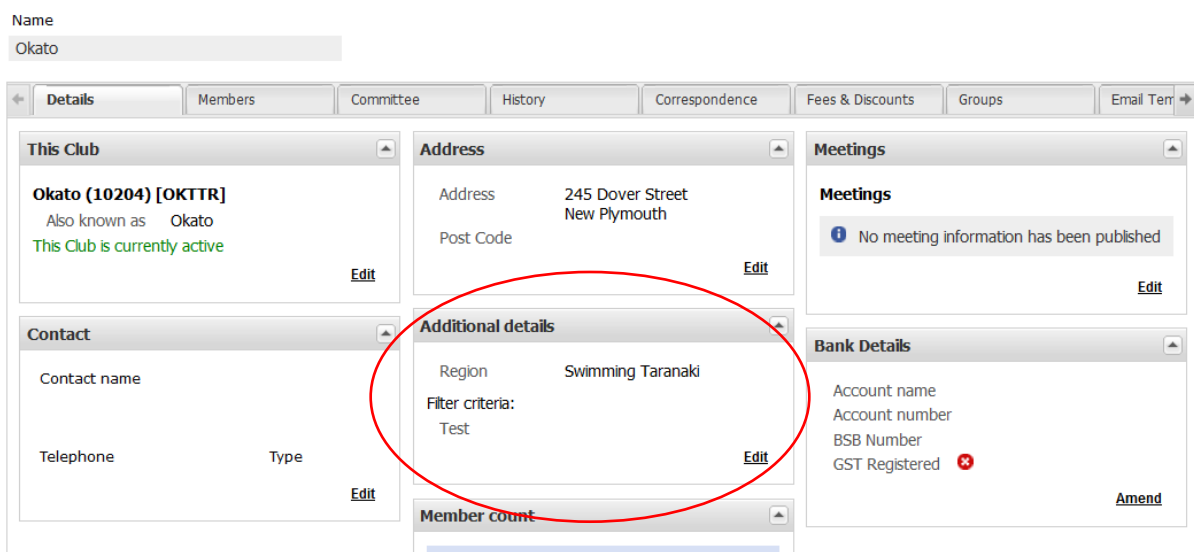
How do I check if I am aligned to the correct region?

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.
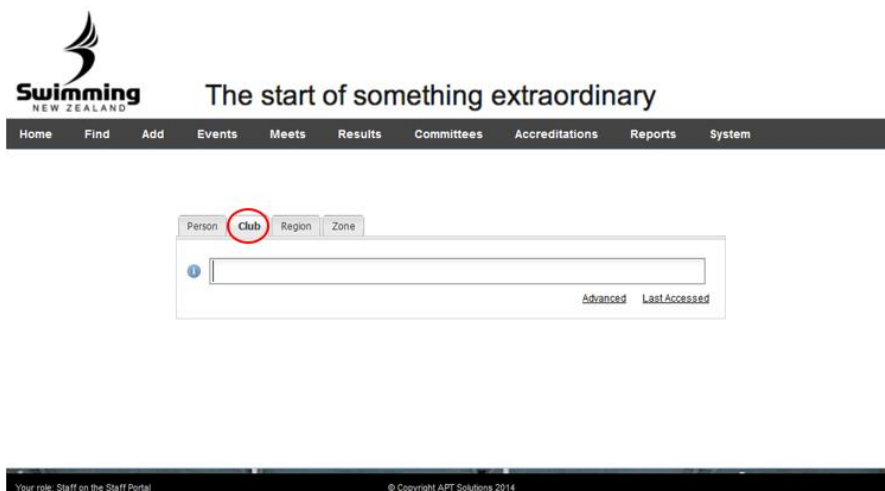
On the Details tab you can view the current banking details recorded for your club in the right-hand column. If the Bank Details fields are blank no details have been added. To edit these details, or to set up details for the first time, click 'Amend'.
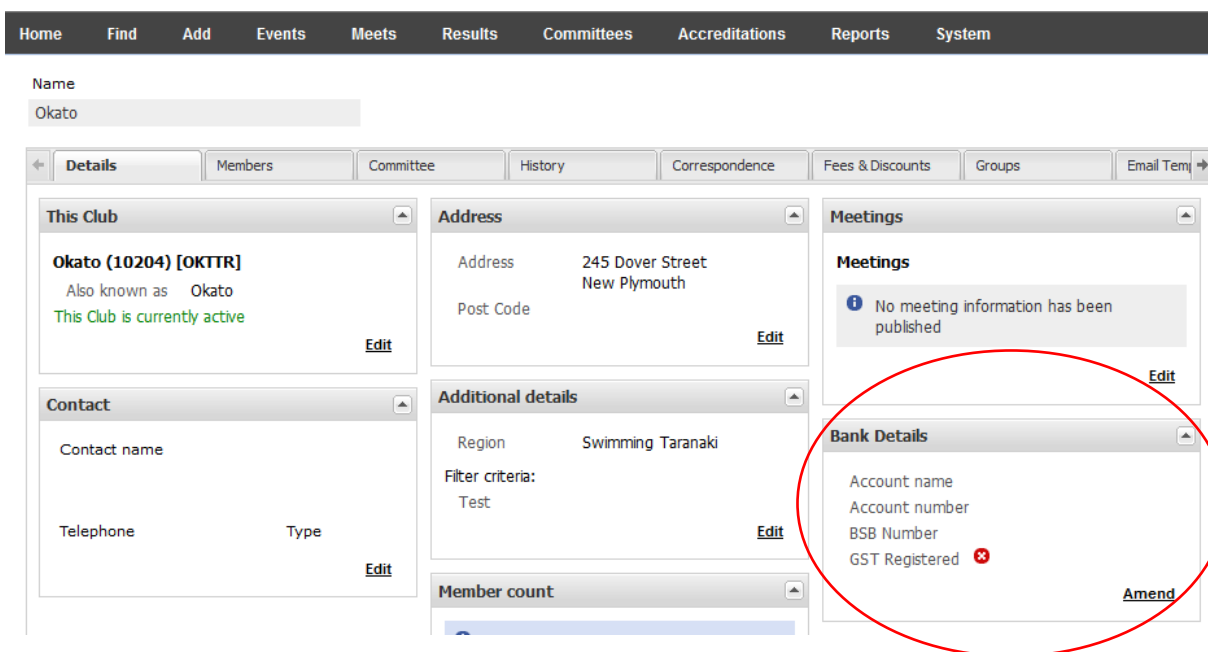
The next screen will allow you to fill out or amend the details as recorded, as well as advising if your club is GST registered.

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.

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

Select Amend under the Bank Details section.

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

Your clubs bank details will now show on the Details.

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.