

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

Prepared by Ken Thompson IT Manager Updated 8th April 2019

Please feel free to point out errors or suggest improvements to these notes.

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Cumulative Update Notes:

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 suitable for distribution to members and potential members 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 4th November 2018 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.

Casual Registrations (nonmembers) 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. Please do not use Eventor to take up this option. Simply filling in all your details on an event registration form & putting CR in the club box is all that is needed. The club or group organising the event will register you as a casual on Eventor.

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

You need to Register yourself, 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:
- 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.

Getting Help:

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

<http://support.orienteeing.asn.au/>

Club Eventor Contacts:

OH Craig Colwell 83398457 TT Fi Pahor 0439 88 9475
TJ Jan Hillyard 8381 4696 WA Frank Tomas 8278 6449
YA Ruth Nicolson 8339 5247 TEO Veronica Walters 0406 875428
LI David Winters 0474187131 SB Ruth Hancock 86491735

General Contact: Ken Thompson itmanager@sa.orienteeing.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 if requested 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.orienteeing.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 or registered as a casual orienteer in a country club 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

In terms of membership payments to orienteering SA & All Clubs the Payment Respite Days has been set to 14 days. Payment respite days = the number of days before Eventor will send the person a reminder about an outstanding payment. In theory if PayPal and/or POLi are implemented the payment is made immediately and the respite days are irrelevant. Where EFT is an option it is up to the treasurer/membership secretary/event coordinator to manually reconcile the payments received into the bank account and confirm their receipt in Eventor. As an example you have respite days set to 14 and the user selects the EFT payment option. Let's assume the payment never gets made. After 14 days the user will be sent an email reminding them to pay. The email contains a link to Eventor so they can find the EFT details to make payment again. After this they get a further 3 reminders at 4 day intervals (a further 12 days respite) after which the entry or membership is cancelled (removed from the system). If the payment is confirmed by an administrator at any time during this period the reminders stop and the person is formally entered.

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

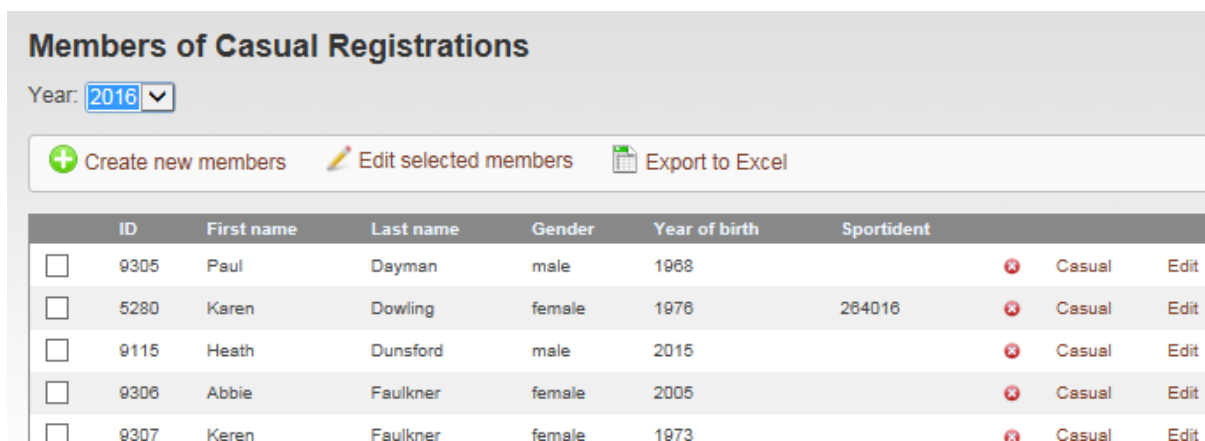
CASUAL REGISTRATIONS

- *Persons wishing to try orienteering or only participate on an occasional basis can register as a casual registration. They need to understand 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.*

Due to membership now being linked to event fees at pre paid events it has been necessary to change the way casuals are recorded on Eventor. Casuals should no longer do this themselves on Eventor. All enter on the day forms need to include the information needed to register them as casuals if they do not wish to be members. The minimum you need to register them is their name and date of birth. The email address should be added if known. This should be done by the club or organising group following each event. Other important details such as address and phone number can be added by clicking on edit

Log on to Eventor

- Select Casual Registrations from the drop down menu below your name at top left. If it does not appear let me know as it means you do not have access rights which I will fix.
- Click Administration -> Overview. Rather like with your club this shows you all the members of Casual Registrations. 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.



	ID	First name	Last name	Gender	Year of birth	Sportident			
<input type="checkbox"/>	9305	Paul	Dayman	male	1968		✘	Casual	Edit
<input type="checkbox"/>	5280	Karen	Dowling	female	1976	264016	✘	Casual	Edit
<input type="checkbox"/>	9115	Heath	Dunsford	male	2015		✘	Casual	Edit
<input type="checkbox"/>	9306	Abbie	Faulkner	female	2005		✘	Casual	Edit
<input type="checkbox"/>	9307	Keren	Faulkner	female	1973		✘	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

Create new members

ID	First name	Last name	Gender	Date of birth
	Usain	Bolt	male	21/08/1986
	Email		Sportident	Send password
	cartography@ihug.com.au			<input type="checkbox"/>

Delete

Add a new member

- 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.

Create new members: check for duplicates

There are persons in Eventor's database with similar details as the new members. For each of the new members, decide if their details should be merged with the original person.

New members	Merge with
Usain Bolt male, 21/08/1986	<input checked="" type="radio"/> Usain Bolt, 21/08/1986, Casual Registrations, Orienteering SA <input type="radio"/> None of the above persons

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

ID	First name	Last name	Gender	Year of birth	Sportident
<input type="checkbox"/> 9631	Usain	Bolt	male	1986	Casual Edit

- 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.

Situation Five: A casual has registered themselves and joined the casual registration membership. This must be changed to prevent casuals from getting a discount at pre payment events

ID	First name	Last name	Gender	Year of birth	Sportident
<input type="checkbox"/> 9631	Usain	Bolt	male	1986	Casual Registration Edit
<input type="checkbox"/> 9305	Paul	Dayman	male	1968	Casual Edit

You will see they have a green tick next to their name and the designation Casual Registration. To fix this do the following:

- Make (look in edit to do this or if processing a lot you could click on export to excel) a note of the persons full name and date of birth
- Click on Casual Registration next to their name
- Click Edit membership
- Click delete membership from both Casual registrations & Orienteering SA
- Click Save
- Click Back... You will see they have disappeared from the overview
- Click Create new members and add them again as shown above. They will appear as a duplicate as they are already in the system so you should only need to enter their Name, gender & date of birth

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)

RESOURCES

Getting Help: Simply Click on Need help? At the bottom right of each screen or click on the link : <http://support.orienteering.asn.au/>

A range of documents are available at this link

A Series of U Tube Videos have been prepared explaining some of the main functions in Eventor

https://www.youtube.com/watch?v=M2mVhAyL338&list=PLbHQ3F_T4jTdkjX4e8tbGxjhS6AUIKxRK&feature=mh_lolz).

- Registering in Eventor
- Editing your details
- Becoming a member
- Family membership in Eventor