



Membership and Tournament System

Society Kick-off Handbook

www.swgsa.co.za

Introduction

It is the responsibility of the Society Management to ensure that their members sign up to this system. This handbook is there as a guide to the management team to observe best practice.

Super User

The very first task of the management team is to identify a person who will be the Super User during the process. This person will need training which will be by means of Skype so that screens can be shared, and costs can be kept down.

Knowledge of computers is essential, and the use of web sites, spread sheets and emails will be the means of maintaining control of the process.

Role players

There are a few role players within the society, the first of which is the Member. Each member will have a role to play, that of being a member and being responsible for her own personal details. The others are Captain, Secretary, Treasurer and Sales. This guide will concentrate on the roles of Member and Secretary, in conjunction with the Super User, with a view to achieving what is spelt out in the introduction.

Phase 1

Members need to be divided into a few categories.

- Those that have access to a computer, an email address, and have browsed the Internet on occasions. Let's call this Class A members.
- Those that have an email address, but have not done much Internet work, and who will struggle to maintain their own details via a web system. Class B members.
- Those that are computer literate, have an email, but no longer play golf. Class C members.
- Those that will never use a computer, but who rely on other means to book a slot in a senior's competition. Class D members.
- Those who don't do computers, and no longer play golf. Class E members.

Phase 2

An email needs to go out to all Class A and B members. This email will introduce the member to the sign up process, and have an embedded link for the member to get into the system and start the process. Attached to the email will be the Member Signup Handbook which guides her through the process.

Be warned that no matter how much you cajole the member, she will not read the handbook. You really have to beg them to follow the process and not to think they are done, when they are only half way!

Half of the members will ignore the email, and maybe come back to it later. A second, third and fourth attempt are needed, and then the phone helps too.

Keep going, and the lists do decrease. Treat every success as an achievement!

Phase 3

Monitor the progress of the Class A & B members by using the Vet member applications function. As members sign up, their names will appear on this list.

If a name appears on the list that you do not recognize, simply delete it. The system can be hacked as the sign up process is started in an unsecured environment. All the hacker needs to do is 'steal' an identity from the handicaps system which is also unsecured (no password protection). This is why we have a vetting process!

Those that have completed the process completely, will have their name displayed as SURNAME, Name. These can then be vetted (edit), meaning their membership category and date of acceptance into the society can be captured.

Those that only have their SURNAME displayed fall into two categories. Both have only gone halfway through the process and, either not bothered to read the handbook, had problems putting in their data, or not received the confirmation email.

Those that received the email, and clicked on the Confirmation link, will have a tick in the Email confirmed column. Those that did not confirm, or didn't receive the email, will not have a tick.

If there is a tick, the member can be vetted, and the secretary can enter their details in Manage society members. They will have problems logging in at a later date, but can at least get past that hurdle with the Forgot my password function.

If there is not a tick, the member may not be vetted, but must be hounded to complete the process by clicking the Confirmation link in the email originally sent. If they can't find, or didn't receive the email, simply delete their entry and invite them to start from scratch.

Different browsers use different methods of entering dates. Date of birth is a member entered field. Date of acceptance into seniors is a secretary entered field. Dates are stored as yyyy-mm-dd. Some browsers accept 21 January 1955, others 1955/01/21. Most members get it right if they read the handbook.

Use Vet member applications to enter Acceptance Date and to capture membership category. Other attributes like Honorary and Veteran status are entered here. Once a member is vetted, she is visible to other members on the system. If a member is not recognised as a member of your society, she can be deleted. This is the only time a member record can be deleted!

Phase 4

Class C members are quite tricky as an initial requirement is a SA Player ID. She doesn't have one! Neither will the SA Player ID ever be used again, as she won't enter any competitions. This member needs to be created under Manage society members, Create new member. Enter as much information as possible, including email address and membership details. Once the member is created, select the Edit function next to her name on the Society Member List, and then select Upgrade to self-managed member. An email will be sent to the member to select user name and password, and to confirm email address.

Phase 5

By now you will have realised that Class B members are a bit of a problem. They are moaning and groaning that the process is too complicated for them, they don't have grandchildren to help them, and frankly they are becoming a pain.

So, you change tack with these members and spoon feed them. You do exactly the same as phase 4, except you have to look up her SA Player Id in the HNA Handicaps app or www.handicaps.co.za, and enter in addition to following the rest of the functionality for phase 4.

Phase 6

Class D and E members are the easiest. Under Manage society members, there is a Create new member function. Enter Class D members with their SA Player ID, and Class E without. If you want to spoil those members, you can always find SA Player ID by searching for it in the HNA Handicaps app or www.handicaps.co.za! You probably have most of their contact information in a spread sheet somewhere too.

Please note that Create new member function should only be used for members that do not use the Internet.

Phase 7

Keep going until your lists are all ticked off. Then we can start getting full use from the system for what it was designed for.

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