

Archery Australia

My Archery

User Guidelines

Version 1-7

Confidentiality / Privacy Agreement

Refer below to the sample of the Confidentiality / Privacy agreement that is used for any personnel who access the Membership Database.

It is recommended that all RGB's and Clubs who are accessing Members records have some form of agreement in use by their organisation.

You can modify this document to use by changing “*insert RGB or Club*” to suit your Organisation or structure.

Confidentiality / Privacy Agreement for the use of the Archery Australia Membership System.

I hereby acknowledge that I understand that my use of the Archery Australia Membership System is under the following conditions ;

- All information viewed or downloaded from the system shall be kept strictly confidential and will only be used to allow me to carryout the duties assigned to me by “*insert RGB or Club*”
- I shall keep my password secure and not allow anyone else to use it.
- If I believe that my password has or may have been compromised then I will notify “*insert RGB or Club*” immediately to have it reset.
- Any computer that I use to access the system shall have;
 - A password protected at the log on stage or start up.
 - Up to date antivirus software
 - Connection only to a secure Internet connection.
- Any printed material which contains sensitive information - names, addresses, contact details, etc - shall be shredded or otherwise securely destroyed prior to disposal when it is no longer required or upon my cessation in the role assigned by Archery Australia that required my access to it.
- Any files stored electronically containing the above sensitive information shall be deleted when either no longer required or upon my cessation in the role assigned by “*insert RGB or Club*” that required my access to it.

I understand and agree to these conditions,

Signed

Date...../...../.....

NAME:.....

NOTE: these notes were put together to assist the Membership Officers in the clubs or RGB's. For further information contact either AA or your State representative.

Application for Access to the AA Membership System

(SAMPLE ONLY: Refer to AA Website for current form.)

I hereby request login details to allow me to Log on and access the Archery Australia Membership System for my (Club / RGB), strike out whichever is not applicable.

Clubname:.....

RGB:.....

Name:..... Signature:.....

Title:..... Email.....

Phone:.....

Date:...../...../.....

We hereby authorise the above person to be given the logon details for our Club.

President of Club / RGB

Secretary of Club /RGB

Name:..... Name:.....

Signature:..... Signature:.....

Date:...../...../.....

Date:...../...../.....

Logging onto the system

I have found the best way to log onto the system is by bookmarking the main IMG Technology page at;

<http://www.imgstg.com/>

Then select “Clients” then click on “Clients Console Logon”.

This then opens a new tab with the client logon.

I have found this to be best as you will always be logging on via the current and correct web address and taken to a secure login page each time.

Alternatively you can log directly into;

<https://console.imgstg.com/>

Which is the direct link to the secure page.

HELP

Online Help is available at anytime by clicking on “clients” and then “clients helpdesq” or at the link <http://helpdesq.imgstg.com/home>

There is information about all parts of the system along with several user guides that explain in further detail how to use the system.

A direct link to the members help section regarding adding and making members financial is located at

<http://helpdesq.imgstg.com/forums/20158023-members-members-listing>

Setting up Users

Suggested setup for RGB or Club

Anyone needing to access the system in their role in the organisation will require their own User Profile.

This assists with the reporting and accountability side of the system and allows each individual to have the system tailored to their individual requirements.

Eg:

Membership Officer: needs to be able to input memberships and process their payment of a subscription.

Treasurer: needs to be able to set the organisation fee structure but not input members.

Secretary: needs to be able to view member contact details.

System Administrator: needs to be able to setup user profiles, assist other users with query and export template design and any day to day issues that may arise.

By setting up User Profiles based on Officer roles it allows for a smooth transition when the people in these roles changes. Simply changing the passwords but keeping the same user permissions.

NOTE: use caution when giving a user “Administration” rights. This should only be done on a limited basis as Administration Rights gives total control of the system structure and other user access levels.

NOTE 2: Changes to user profile permissions are not immediate, it can take up to 20 minutes for the new permissions to come into effect after they have been saved.

The Archery Australia Database Administrator is available to assist with the setup of User Profiles when requested.

Guideline re financial end dates.

(refer to AA Membership Terms and Conditions policy 1010)

If renewal of membership then set the financial end date to one year from the existing expiry date.

ie; member expiry 30/6/11. Member renews on 29/11/11 then new financial end date would be 30/6/12. (example based on financial year membership term)

If a new membership and has paid the full fee then,

if member joins 13/11/11 then set financial end date to 13/11/12. The date of payment to your Club + 12 months is the correct financial end date for all NEW members or members returning after more than a 12 month unfinancial state as mentioned below.

If a existing member renews after his membership had expired by more than 12 months then,

treat as a new member.

Ensure at the time of generating the subscription that the “financial end date” is going to be set by the user and then set the date to the one required.

Family Subscriptions

Select main family member.

Select his / her subscription type as the applicable family rate.

Make him / her a Primary Member.

Link to the other family members and “**click on the link chain**” to establish the link.
(not the link button at top of screen)

Once all family members have been added then, **(NOTE: if you are a RGB then log in as the Club before generating the family Subscription.)**

Generate a subscription for the main member, “**select (tick) the other family members to included**” them in the payment.

(NOTE: you may need to scroll down the screen to be able to see the boxes to tick to include the other family members at this time)

Post the subscription.

Pay the subscription.

This makes sure that the one payment also updates the other family members to the financial status and the correct end date for their memberships.

FAMILY MEMBERSHIP (extract from AA policy 1010 “11/11/11)

AAI offer discounted membership fee for families. Conditions of this Family Membership shall be

- 1) All ‘families’ must fall under one of the legally accepted forms of a family.
- 2) There will be 2 levels of Family membership
 - a. Family 1 – Two Adults and One Minor
 - b. Family 2 – One Adult and two minors
 - c. Each additional minor will pay an Additional Family Member fee.

How Do I align family members with different Financial End dates so that they can get a family membership subscription ?

It is quite often the case that members of a family may join at differing dates when they are first starting up in the sport.

Eg: Son Billy joins on 1st of February and Father Fred joins on 1st of June in the same year.

To allow us to set them up for a family membership subscription requires them to have the financial end dates for all members of the family realigned prior to the Primary Members renewal being done.

How is this done ?

When the son “Billy” comes up for renewal we fill out a blank subscription for him and calculate the pro rata payment to let him renew up until the 1st of June which aligns him with his father “Fred”.

THIS IS THE ONLY TIME A PRO RATA PAYMENT MAY BE MADE IN THE SYSTEM. It results in a cash / cheque payable invoice, NOT credit card payable.

***IF A CREDIT CARD PAYABLE SUBSCRIPTION IS REQUIRED CONSULT WITH THE AA SYSTEMS ADMINISTRATOR databaseadmin@archery.org.au

Then when Fred comes up for renewal we just do a normal family membership and include Billy in the payment as per normal.

How do I work out how much they need to pay ?

(This subscription allows a way to pay a one off prorata amount to align members of a family who joined at differing dates.

This allows them to then be later linked as a family to ensure they get the family rate when the primary member renews.

When a family member comes up for renewal before the others, then divide the applicable fees for NATIONAL, STATE and CLUB by 12 and then times it by the number of months you will be pro rata paying to bring his membership end date up to the same as the primary family member. Enter the amounts in the sections and fill in the Total Amount.

If unsure consult AA or your RGB Membership Officer.)

Steps involved in creating the subscription and realigning the member.

1. Search for the record of the Primary Family member and write down his / her expiry dates.
2. Now search for the first family member that is coming up for renewal prior to the primary member.
3. Generate a “ **Blank Subscription (For use to realign family memberships ONLY).**” subscription for this person.
4. Calculate the applicable pro rata payment (refer to notes above) for AA / State / Club and put these figures in the payment boxes.
5. **IMPORTANT:** total the amounts up and put the total in the “Total Amount”
6. Tick the “Yes - Financial Enddate” button and set the date to the same as the Primary Member.
7. Generate the Subscription.
8. Post the subscription.
9. Pay the subscription.
10. This has aligned the persons end date to the same as the Primary Member.
11. (Ensure that the person is linked to the Primary Member so that they will be included in his / her renewal when this comes up.
12. Notify by email AA and your State / RGB membership officer that this has been done to let them know to expect the subscription that will be coming through with non standard payment amounts.

Editing existing member records.

NOTE: as these records are used by several different parties then great care must be used when modifying or changing a record in anyway as it can influence the other parties who use the system. (Member, Club, State, Archery Australia.)

When an existing member record is edited then all required fields (ones with a red dot) will need to be correct at the time of saving. If you do not fill out all required fields then you will not be able to save the record.

You will need to exit the record, redo the needed changes and save it.

All members must have an email address included in the record. If they have not supplied one at the time of editing the record then I recommend using a Club email (check with the club first but something like treasurer@myacheryclub.com (sample only) or other relevant email address. The member can change to their own email address later if desired.

The gender and title of the member will need to be selected also if it is the first time a record has been edited since initial data was placed on the system.

Member Transfers

If a Member wishes to transfer their principle membership from one club to another (their principle club is the one through which they are registered with AA and their RGB) then the Club they are applying to transfer to should follow the steps below.

1. Perform a network wide search to confirm which club they are currently affiliated through.
2. Click on the green transfer arrow against the persons name.
3. Write a brief description of the request for transfer.

The club which the member is currently affiliated with can then decide to release the member from their end if they are agreeable to do so. (this is usually where a club ensures that the member is not owing any monies to them before allowing the transfer to take place)

Should any problems be experienced when processing a transfer then consult with either the RGB Admin Officer, AA Systems Administrator or the Archery Australia office for assistance.

Member Groups

Member Groups are a way of setting up individual members into pre defined groups for reporting or exporting / emailing.

Eg; Executive Officers, Coaches, Club Contacts, Key Holders, Newsletter mailing list, etc.

This is a very useful feature and one that is quite easily setup.

Click “Members”

Click “Member Groups”

Click “Add”

Type in the name of the Group.

Type in a brief description of the Group.

Leave the other selections on “No”

Click “Save”

Click “Listing” to see the new group you have created.

To add members to the group;

Click on the “attach members icon” at the far right hand side of the group name.
(this will take you to the member listing search page)

Click on the first initial of the member surname.

Click on the “change group status” symbol (looks like a chain link with an + symbol on it).

Do this for all the remaining members you wish to add to the group.

To view the members in a group.

Go to “Member Groups”

Click on the “View Attached Members” icon at the rh side of the group name.

To remove a member from a group.

Go to the “Member Groups”

Click on the “View Attached Members” icon at the rh side of the group name.

Click on the “Detach Members” icon (looks like a broken chain link) at the rh side of the persons name.

Viewing Member Records

NOTE: after performing a search and finding the information that you need, you will need to press the “clear search” button or you will not be able to see all records.

Click on “Members”

Click on “Members Listing”

Click on the binoculars symbol.

Searching by financial status.

Click on “Active” button.

Click on “Financial” button.

Searching for an individual Member.

Type the Surname of the Archer you wish to search for in the “member search” box and press the “search” button.

Searching for Members of a Group.

Click on “Members”

Click on “Member Groups”

Click on the “members symbol” next to the group name you wish to search in.

Searching for a Subscription Type.

Click on “Subscriptions”

Click on “Subscription – Types”

Click on the “members symbol” next to the subscription type that you wish to search in.

Backing up / exporting data

It is important to periodically backup all Membership details and information. (This will be done by IMG but it would be good practice for each Organisation to keep a backup of its own data.)

The easiest way to do this is to export the information into an Excel spreadsheet on the Administrator (or Membership Officer) computer.

NOTE: this also allows for the records to be looked up, searched, sorted as required whilst offline from the internet.

You can export all or part of the members records and also limit which members information is exported.

To Export:

Click “Members”

Click “Export”

Click “All Members”

Select the **export template** you wish to use. Default = all fields in the database.

Select the **member status**. (should be active normally)

Select the **financial status**, (financial or unfinancial members)

Click “next”.

Click “export”

A file will then be downloaded to your computer as an Excel format spreadsheet.

NOTE: pay attention to the date format DD/MM/YY is what we normally use but this may be different depending on the software you use and its settings.

Using Filters

In certain areas of the system you will see what appears to be yellow “funnels”, these indicate that a filter can be set for reporting in this area.

Filters can be applied to only show or export information that lies within a certain range of parameters. Eg; to show financial transactions within a particular date range.

Remember to clear the filter by pressing the filter symbol with the red X in it to allow you to view all records again afterwards.

Using Queries

Queries can be designed to run similar to filters in that they are used to collect a set of members whose records comply with the criteria written into the query.

Help with the use of Queries can be found at the Online Help area under the “How do I use the query builder” heading. Here is a direct link to the information.

<http://helpdesq.imgstg.com/entries/20143542-how-do-i-use-the-query-builder>

If further help is required with the design of queries then you can contact your State Representative or the AA Systems Administrator.

To Export a member query

Click “Members”

Click “Export”

select **Member Query** that you want to use.

Select **Export Template** that you want to use.

Click “Export format” (excel or CSV)

Click “Next”

Click “Export”

Export Templates

Export templates are created and used to allow the user to export only the relevant fields that they want and not every field within the system (backups are all fields in the system).

Uses for this may be, a Member List (showing only name, membership number), Mailing List (showing all members and their addresses), Recorders List (showing all members names and dates of birth), etc.

Online Help can be found at the following address in regards to creating export templates.

<http://helpdesq.imgstg.com/entries/20143552-how-do-i-create-an-export-template>

Custom Fields

This is a very useful feature of the system and allows each Club / RGB / AA to setup a number of unique fields within the database for their own individual use. They can be made visible only at each level of the structure, ie Club only can see or they may want to share a particular custom field with their RGB or AA if desired.

This gives each Organisation the ability to replace the numerous lists that they may have been keeping with one centrally located system.

In this way any information that you would normally store for each member can be easily set up.

To set up a custom Field.

Click on the “Administration” menu.

Click on “Custom Fields”.

Click on “Edit”.

Click on the tab for the desired field type eg; Text Box, Date, Yes / No, Number and List Box.

Enter the relevant question or information title.

Click on the settings you wish to use for the custom field. Refer to the IMG “Get to know Clubs online” document for assistance on which settings to use.

Further assistance is available from the AA System Administrator for this function.

NOTE: changes to custom fields within a system may not take immediate effect.