### **COA Account updated Dec 2**



### **SECTION 7: ADMINISTRATOR ACCOUNTS**

#### 7.1 Creating Administrator Accounts

There is an admin login page for administrators. Registrants log in on a separate page.

Admin Login URL: <u>https://swimming.canada.sportsmanager.ie/maint.php</u>. Administrators log in using their Username <u>or</u> Email Address and Password.



#### **Admin Account Login**

There is no specific function within REMS to send a reset link for an administrator account. You can force a reset password by just using the Forgot Password function on the login screen. When you create a new admin account, this is an easy way to notify the new administrator that their account has been created and force them to create a new password for their account.

#### 7.1.1 Resetting Admin Account Password

Administrators can reset their own password using the Forgot Password function on the login screen. To reset the password, the administrator must enter the **Username** (not email address). If the account exists, a link will be sent to the email address associated with the Username.

ADMIN LOGIN	
Not an administrator? click here for member area	ADMINISTRATOR FORGOT PASSWORD
Username	Please enter your admin username below. If a valid username is found, a forgot password link will be sent to the email address associated with that username.
Password	Username
LOG IN	
LOG IN	e Submit



**Note**: there is currently no way to define a template for admin accounts in REMS. You will need to add each admin account and define the specific functions that the user can access individually. This feature will be available next season.

#### 7.1.2 Admin account requirements

To create an admin account, you need the following information:

- a. Parent –Club name for club administrator accounts
- b. Username see Admin account naming recommendations below
- c. Email address
- d. Password make up a password

#### 7.1.3 Admin account names (usernames)

Admin account names (username):

- a. Are not case sensitive
- b. NO spaces
- c. Must be unique
  - if someone is an admin for more than one club, they will need different usernames for each admin account but the email address can be the same
- d. Are used in the Forgot Password function for Admin accounts (not email address)

When creating accounts for other roles within the REMS, we *highly* recommend that clubs use the pattern below for their usernames: Enter this pattern in the field "Name" (no spaces permitted)

- Club Registrar: **REG\_fullname\_CLUBCODE**
- Club Administrator: *ADMIN\_fullname\_CLUBCODE* (same settings as Club registrar)
- Team Manager: **TM\_fullname\_CLUBCODE** (same settings as Meet Manager)
- Meet Manager: MM\_fullname\_CLUBCODE
- Club Official Administrator: COA\_fullname\_CLUBCODE
- Treasurer: TR\_fullname\_CLUBCODE

The above pattern is very important to ensure that the people in the specific admin roles receive the appropriate communications. If a person has multiple admin roles, please include those roles in the username (example -COA\_MM\_fullname\_CLUBCODE)



#### 7.1.4 Create Club Admin Account

To create Club admin accounts, the parent will be Club name for club administrator accounts (name at the top of the list when you click Add. You will receive a warning if the password is too weak.

#### Add/Edit Club Admin Account

System Configuration		Add admin	ub Administr	ators	
Create/Edit Club     Create/Edit Association     Create/Edit Venue	View Account	account	Add a Depart	Account actions	<del>4</del> 14
Login As User	Utername 4	Inul Address #	Search/filter options     Association Type #	Association Account	*
Cauguages	Swimming Club Admin	antascheffelwoo@gmail.com	Age Group Club	Swimming Province Swimming Club	≡ 12' ↔

Parent	Swimmina Province Swimmina Club 💌	
Name	Swimming Province	
Email Address	Swimming Province Swimming Club	
	Reset Email	
Password		
Confirm Pacouard		

Once you have created the account, you need to assign the menu items that the admin account has access to. By default, if you do not choose specific menu items, the admin will have access to everything available at the Club level. We recommend that you refer to the guides provided below to setup Club admin accounts and only turn on the options recommended.



Once you have created the admin account, turn on the specific menu. <u>Recommendations</u> for the menu items to enable is listed with each account type. If an admin holds more than one function, you can just turn on the options that the administrator needs for both roles rather than creating a second admin account. **If you select nothing in the Manage Menu list, the administrator will have access to all menu options**.

Manage Menus for Club Admin Account

System Configuration	View Account				+ 10
Create/Edit Club			+ Add	Manage	
Create/Edit Venue			Search/Eter options	Menus	
Manage User Accounts	Usemane 1	Inst Address 0	Association Type 2	Association Associat. 2	1
Login As Oser	newOUBaccourt	sportlowojbowiewning.ca	Age-Group Chile	Swimming Province Swimming-Club	
Languages	new/90sccourt	sportlomo@iswinsning.cs		Seimming Province	

### See next pages for the templates...

Do not leave the access selections blank as the default is to allow blanket permission to everything.

The settings selected for each role are important to follow to not cause errors with the registration process. Having access to everything will cause confusion with the multiple role access. The Club Registrar account settings has all the settings to do all the roles listed below.



# REMS CLUB ADMIN ACCOUNT MENU SETUP

2024-2025 Season

### **REMS Club Registrar Menu Organization**

★ HOME ? HELP ▲ MY ACCOUNT ▲ PRIVACY POLICY	SWITCH TO FRENCH (CANADA)(CANADIAN FRENCH	
Club Information	Communications	Registration
Edit Club Information	<ul> <li>Notifications</li> </ul>	<ul> <li>View Registrants</li> <li>Payments Received</li> <li>Register Members</li> <li>Registration</li> <li>Approve Members</li> <li>Transfers and Affiliation</li> <li>Member Accounts</li> <li>Invoicing and Fees</li> </ul>
🗱 Membership Setup	Compliance and Certification	Events
• Generate Registration Link	<ul> <li>Credentials</li> <li>Member Credentials</li> <li>Coach Compliance and Official's Certification</li> </ul>	<ul> <li>Orders</li> <li>Events Purchased</li> <li>Attended</li> <li>Purchase Events</li> </ul>
Meet Management	Settings	

Manage My Meets

Meet Entry

# **REMS Club Registrar Menu Options**

### Options for registraraccount

Membership	Edit Club Profile	Membership Setup
<ul> <li>Invoicing &amp; Fees (Club)</li> </ul>	Edit Club Info	Payment Methods
View Registrants	Role Profiles	Membership Types
Payments Recieved		Begin selling
Invoice Details		Custom Fields
Approve Members		
Content Pages		
Member Transfers		
Start Transfer (Request)		
Registration Invoicing		
Member Transfers Approve/Reject		
Request Dual		
Start Make Payment		
Group Registration		
Group Registration Payment		
Update Member Account		
Member Approval		
Items not On home page	Events	System Configuration
Club Profile Types	V Event Orders	Child User Menu Options
Sub Merchant On Boarding	Purchase Events	Associations
Club Profiles	V Event Purchases	MFA Management
Member Signed Acceptances		Club Administrators

Member Credentials

# **REMS Club Registrar Menu Options**



#### Meet Management



# **REMS COA Menu Options - updated - Dec 2**





- Membership Setup
- Email Notifications
- Generate Registration Link

A Reports

System Reports

#### Compliance and Certification

- Oredentials
- Member Credentials
- Ocoach Compliance and Official's Certification

### User Menu Options



# **REMS COA Menu Options - updated Dec 2**



### **REMS Meet Manager Menu Organization**



Meet Management

Manage My Meets

Meet Entry

# **REMS Meet Manager Menu Options**

Event Purchases

#### Options for meetmanageraccount

Membership	Edit Club Profile	Membership Setup
Invoicing & Fees (Club)	Edit Club Info	Payment Methods
View Registrants	Role Profiles	Membership Types
Payments Recieved		Begin selling
Invoice Details		Custom Fields
Approve Members		
Content Pages		
Member Transfers		
Start Transfer (Request)		
Registration Invoicing		
Member Transfers Approve/Reject		
Request Dual		
Start Make Payment		
Group Registration		
Group Registration Payment		
Update Member Account		
Member Approval		
Items not On home page	Events	System Configuration
Club Profile Types	✓ Event Orders	Child User Menu Options
Sub Merchant On Boarding	Purchase Events	Associations

MFA Management

Club Administrators

Club Profiles

Member Signed Acceptances

Member Credentials

### **REMS Meet Manager Menu Options**

Notifications	User Account	User Account
Notifications	Main User	Sub User
Member Communications		
Accreditation	Email Configuration	Members/Teamsheets
Certifications	emailConfiguration	TeamSheetPanels
View Member Qualifications	notificationsHistory	
Coach Compliance and Official's Certification		
Sanctioning	Electronic Game Management	Member Attendance
Event Surveys	Team Sheets Rosters	Member Attendance
Surveys	Support Staff types	Roster Attendance Details
		Event Attandance Cheets
Sanctioning Credentials	Team Roles	Event Attendance Sneets



### **REMS Treasurer Menu Organization**



# **REMS Treasurer Menu Options**

#### Options for treasureradmin

Member Credentials

Membership	Edit Club Profile	Membership Setup
Invoicing & Fees (Club)	Edit Club Info	Payment Methods
View Registrants	Role Profiles	Membership Types
Payments Recieved		Begin selling
Invoice Details		Custom Fields
Approve Members		
Content Pages		
Member Transfers		
Start Transfer (Request)		
Registration Invoicing		
Member Transfers Approve/Reject		
Request Dual		
Start Make Payment		
Group Registration		
Group Registration Payment		
Update Member Account		
Member Approval		
Items not On home page	Events	System Configuration
Club Profile Types	Vent Orders	Child User Menu Options
Sub Merchant On Boarding	Purchase Events	Associations
Club Profiles	Event Purchases	MFA Management
Member Signed Acceptances		Club Administrators

# **REMS Treasurer Menu Options**

Notifications	User Account	User Account
Notifications	Main User	Sub User
Member Communications		
Accreditation	Email Configuration	Members/Teamsheets
Certifications	emailConfiguration	TeamSheetPanels
View Member Qualifications	notificationsHistory	
Coach Compliance and Official's Certification		
Sanctioning	Electronic Game Management	Member Attendance
Event Surveys	Team Sheets Rosters	Member Attendance
Surveys	Support Staff types	Roster Attendance Details
Sanctioning Credentials	Team Roles	Event Attendance Sheets

#### Meet Management

