User Manual: **Club Management MashApp**

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Contents

1. Introduction

This user manual is designed to guide you through using the **Club Management** MashApp solution to manage the activities of a club. This MashApp was built using **Composer**, a MashApp tool from **Cordys Process Factory** (**CPF**).

Usually, when you do not have an automated system for managing club activities, the bottlenecks are many. For example, the long tedious procedures of club management are time-consuming and taxing, which makes it difficult to manage. Managing memberships, dues, groups, and organizing events are not easy. Moreover, the club activities might not be carried out efficiently.

To avoid such bottlenecks, we are providing the **Club Management** MashApp, which will help you:

- Reduce cycle time
- Add value and quality to your members
- Attain greater control over the club activities

To use the **Club Management** MashApp, you need to first set up organization data such as application users, roles, and groups and then set up MashApp **Master Data** such as organizations, club details, configure groups, and general activities.

After setting up the required data, you can use the MashApp to manage club management activities. You can register for membership, process the membership, maintain groups, and organize events. You can also monitor data through forms, charts, and reports.

2. Setting up Organizational Data

Now, you need to set up organization data such as application users, roles, and groups.

2.1 Creating Application Users

You need to create application users to enable users in your organization to access the **Club Management** MashApp. You also need to assign users the appropriate privileges to restrict their access within the MashApp. Do the following to set up application users.

1. Click **Setup** → **User Management**. The **User Management** page appears.
2. Click **Go to** for **Application Users**. The **Application Users** page appears, displaying a list of existing application users.
3. Create an application user. Do the following.

    a. Click **Add** and select **Add New User to the Application**.

    b. In the **User Id** field, type the unique id of the user in the form of a valid email address. For example, "lmiller@radiantpower.com". This email address is populated in the **Login Id** and **Email** fields respectively.

    The credentials required to access the **Club Management** MashApp will be sent to the user via email.

    > ***Note**: You cannot modify the **Login Id**.*

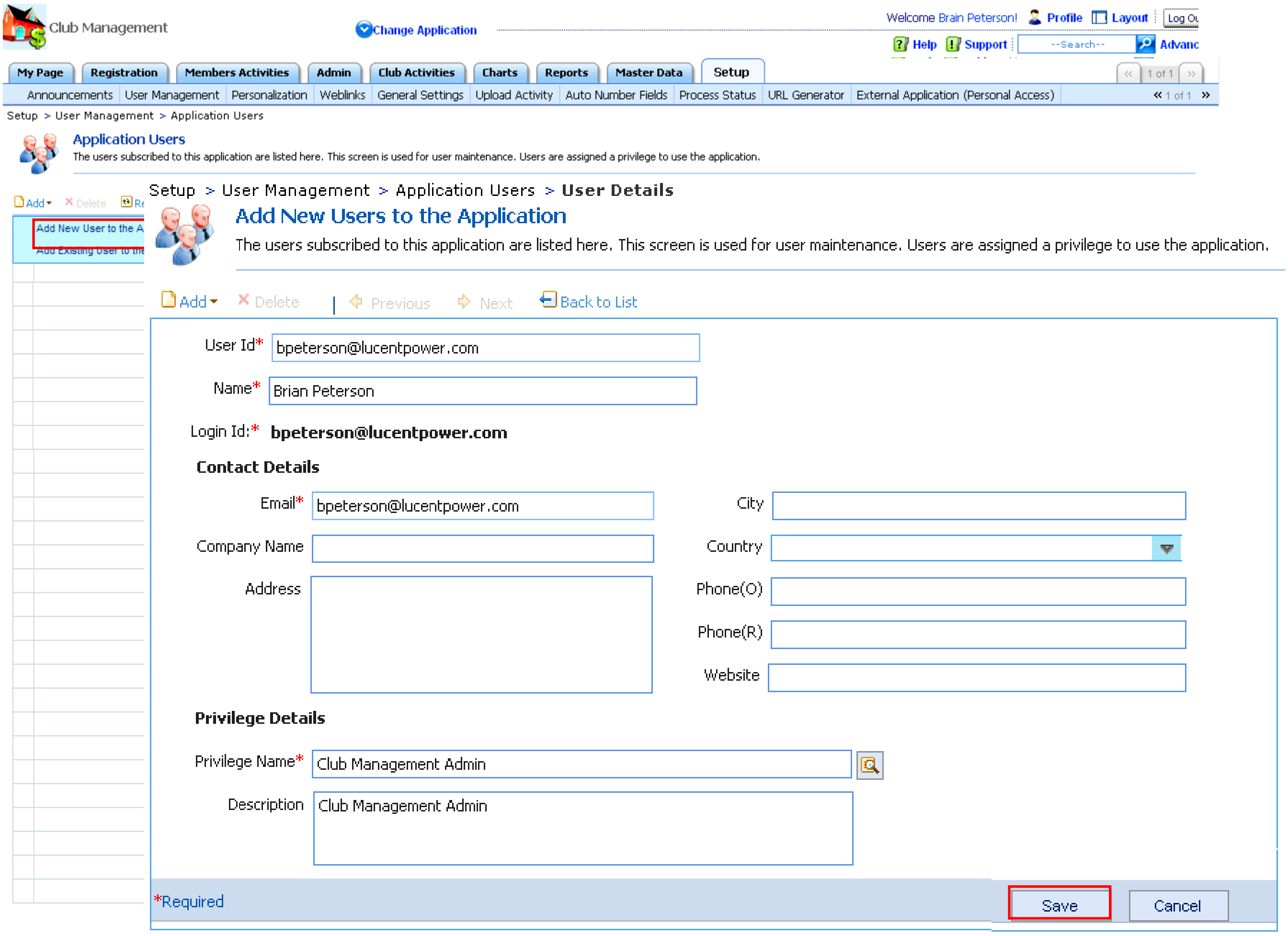
    a. Provide the required details of the application user such as **Name** and **Contact Details**.

    b. Assign a privilege to the user to access the **Club Management** MashApp. Click for **Privilege Name**. The **Application Privileges** dialog box appears.

    c. Select one of the following privileges to assign to the user according to their role in the organization:

    - **Club Management Admin**: This privilege enables users to maintain the **Master Data** that needs to be set up for the functioning of the MashApp. For example, Club Details, Configure Groups, and General Activities.
    - **Group Admin**: This privilege enables users to organize events for the members of their groups.
    - **Member**: This privilege enables users to take part in club activities.
    - **New Member**: This privilege enables the users to access a form to register themselves as members.

    Click **OK**. The privilege is assigned. The description of the privilege appears in the **Description** field.



d. Click **Save**.

An application user is created and the required privilege is assigned to the user. As soon as the user is added, he or she receives an email with the **Login Id** and **Password** required to log on to the **Club Management** MashApp.

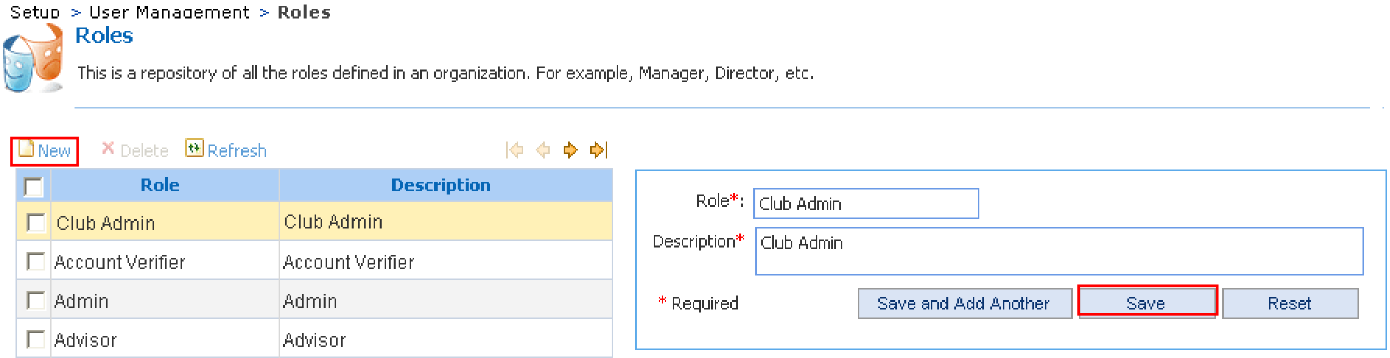
This application user is also an organization user. So, you can grant access to this user to other applications in the organization through the **Setup** tab for those applications using the **Add Existing User to the Application** option.

You have created an application user successfully.

2.2 Creating Roles

Roles define the responsibilities assigned to a user. You need to create **Club Admin** role. Do the following.

1. Click **Setup → User Management**. The **User Management** page appears.
2. Click **Go to** for **Roles**. The **Roles** page appears.
3. Create the **Club Admin** role. Do the following.
   a. Click **New**. In the **Role** field, type “Club Admin”.
   b. In the **Description** field, type “Club Admin”.



4. Click **Save**.

2.3 Creating Groups

Groups enable you to group users in your organization as well as assign responsibilities to users in the form of roles. You need to create a group called **Administration** and assign appropriate responsibilities to users in this group. Do the following.

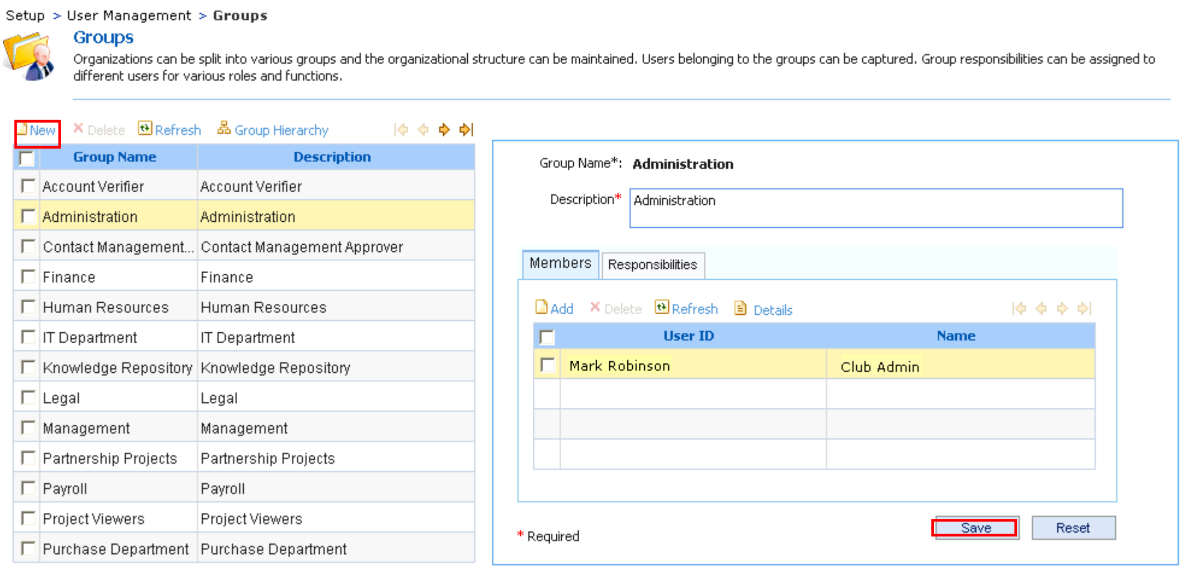
1. Click **Setup → User Management**. The **User Management** page appears.
2. Click **Go to** for **Groups**. The **Groups** page appears.
3. Create the **Administration** group. Do the following.
    a. Click **New**. In the **Group Name** field, type "Administrator".
    b. In the **Description** field, type "Administrator".
    c. Click the **Responsibilities** tab to assign responsibilities to users.
    d. Click **New** to assign the responsibility of an **Administration** to a user. The **New Responsibility** dialog box appears.

    Do the following.

    i) Click for **User**, select the user to whom you want to assign the **Club Admin** role, and click **OK**.

    ii) Click for **Role**, select the **Club Admin** role, and click **OK.**

    e. Click **OK**. The responsibility of an **Administration** is assigned to the user.



f. Click **Save**.

You have added a group successfully.

3. Setting up Master Data

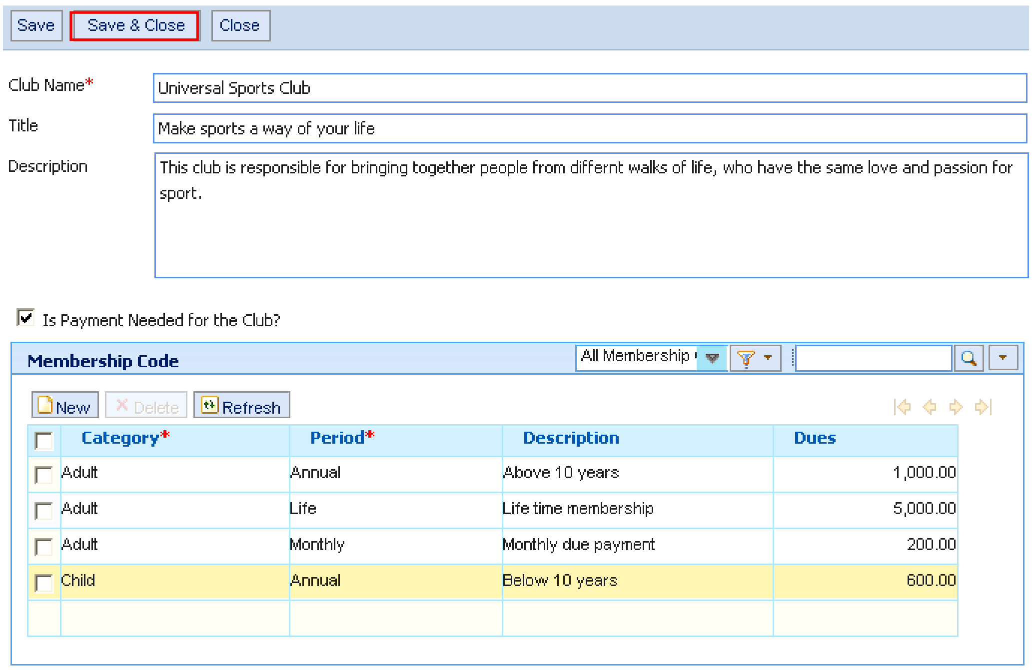
After setting up the required application users, you need to set up the **Master Data** that is required for the functioning of the **Club Management** MashApp.

> ***Note**: You can set up **Master Data** only if you are assigned the **Club Management Admin** privilege.*

3.1 Club Details

You can add the details about the club. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Club Details**.
3. In the **Club Name** field, provide the name of the club.
4. In the **Title** field, provide a title for the club.
5. In the **Description** field, provide a short description about the club.
6. Select the check box for **Is Payment Needed for the Club?**, if required and do the following.
    a. In the **Membership Code** section, click **New** to add a new membership code.
    b. In the **Category** drop-down list, select one of the following.
        - **Adult**
        - **Child**
    c. In the **Period** field, provide the duration of membership for the category.
    d. In the **Description** field, provide the description of the category.
    e. In the **Dues** field, provide the membership dues for the category.



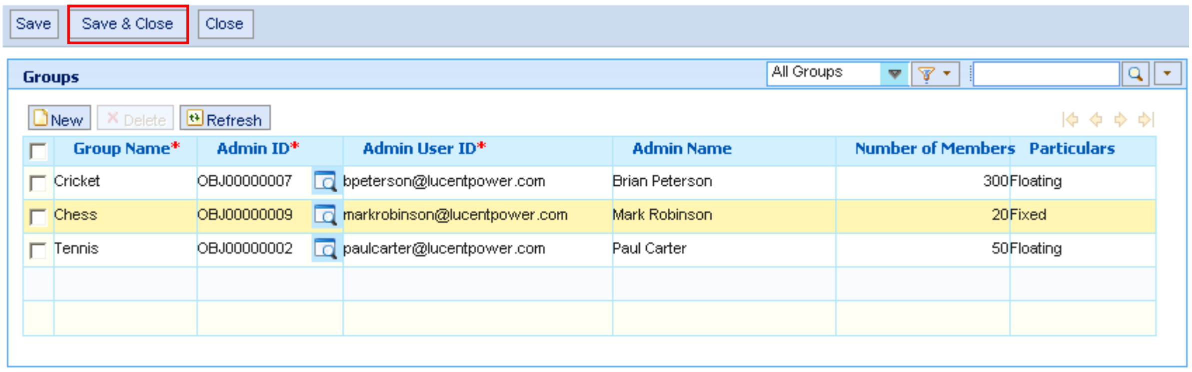
7. Click **Save & Close**.

You have added the club details successfully.

3.2 Configure Groups

You can configure groups for your club. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Configure Groups**. The **Groups** form appears.
3. Click **New** to add a group.
4. In the **Group Name** field, provide the name of the group you want to create.
5. Click for **Admin ID**, select a member as the group admin, and click **OK**.
6. In the **Admin User ID** field, provide the user ID of the group admin you have selected.
7. In the **Admin Name** field, provide the name of the group admin.
8. In the **Number of Members** field, provide the number of members you want to have in the group.
9. In the **Particulars** drop-down list, select one of the following:
    - **Fixed**: The number of members is predefined and fixed.
    - **Floating**: The number of members is not fixed.



Save | Save & Close | Close

Groups

All Groups

New | Delete | Refresh

Group Name*	Admin ID*	Admin User ID*	Admin Name	Number of Members	Particulars
Cricket	OBJ00000007	bpeterson@lucentpower.com	Brian Peterson	300	Floating
Chess	OBJ00000009	markrobinson@lucentpower.com	Mark Robinson	20	Fixed
Tennis	OBJ00000002	paulcarter@lucentpower.com	Paul Carter	50	Floating

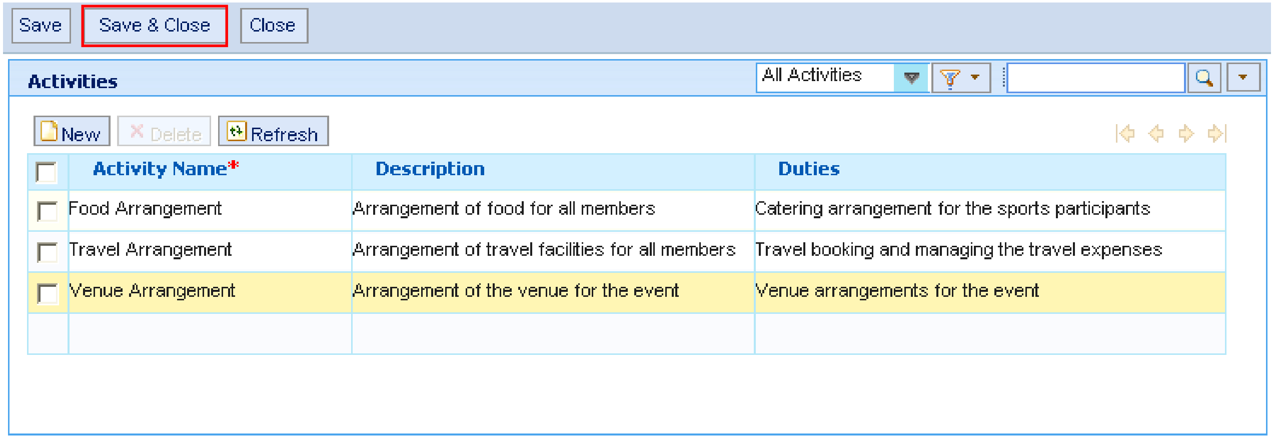
10. Click **Save & Close**.

You have configured a group successfully.

3.3 General Activities

You can add the general activities of your organization. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **General Activities**. The **Activities** form appears.
3. Click **New** to create a new activity.
4. In the **Activity Name** field, provide the name of the activity.
5. In the **Description** field, provide a brief description of the activity.
6. In the **Duties** field, provide the duties to be performed for the activity.



7. Click **Save & Close**.

You have added the general activities successfully.

4. Registering as a Member

Once you have set up the application users and **Master Data**, member registration can be done.

4.1 Requesting for a Membership

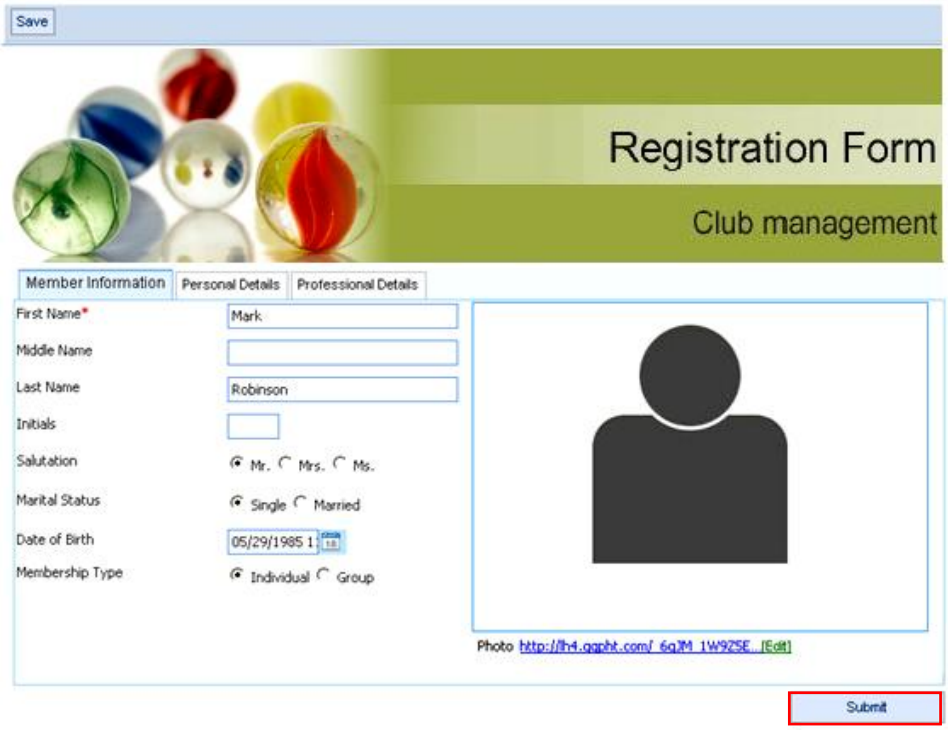
Once you have set up the application users and **Master Data**, the new users can register themselves using the quick registration form. Do the following.

1. Click the **Registration** tab. The **Registration Form** appears.
2. On the **Member Information** tab, do the following.
   a. Provide details, such as **First Name**, **Middle Name**, **Last Name**, etc.
   b. Select one of the following options for **Salutation**:
      - **Mr.**
      - **Mrs.**
      - **Ms.**
   c. Select one of the following options for **Marital Status**:
      - **Single**
      - **Married**
   d. Click for **Date of Birth**; select your date of birth.
   e. Click for **Membership Due Payment Type**, select a membership code, and click **OK**.
   f. In the **Photo** field, provide the URL to upload your photo.
3. On the **Personal Details** tab, do the following.
   a. In the **Address** field, provide your residence address.
   b. Provide other details such as **City**, **Email**, **Mobile**, etc.
4. On the **Professional Details** tab, do the following:
   a. In the **Company** field, provide the name of the company.

b. In the **Activity Description** field, provide a description about the activities of your business.

c. Provide other details, such as **Category**, **Number of Employees**, **Email**, etc.

5. Click **Save**.
6. On the **Member Information** tab, select one of the following for **Membership Type**:
   - **Individual**: Select this option if you want an individual membership.
   - **Group**: Select this option if you want a group membership. The **Referred Members** tab appears. Do the following.
     a. In the **Number of Adults** field, specify the number of adults in the group membership.
     b. In the **Number of Kids** field, specify the number of kids in the group membership.
     c. In the **Referred Members** section, do the following.
        i) Click **New** to add the members in the group membership.
        ii) In the **Related Member** field, provide the name of the related member.
        iii) In the **Member Type** drop-down list, select one of the following:
           - **Adult**
           - **Child**
        iv) In the **Relation** field, provide the relationship with the referred member.
        v) In the **Age** field, provide the age of the referred member.
        vi) In the **Gender** drop-down list, select the gender of the referred member.



7. Click **Save**.
8. Then, click **Submit**.

You have requested for a membership successfully.

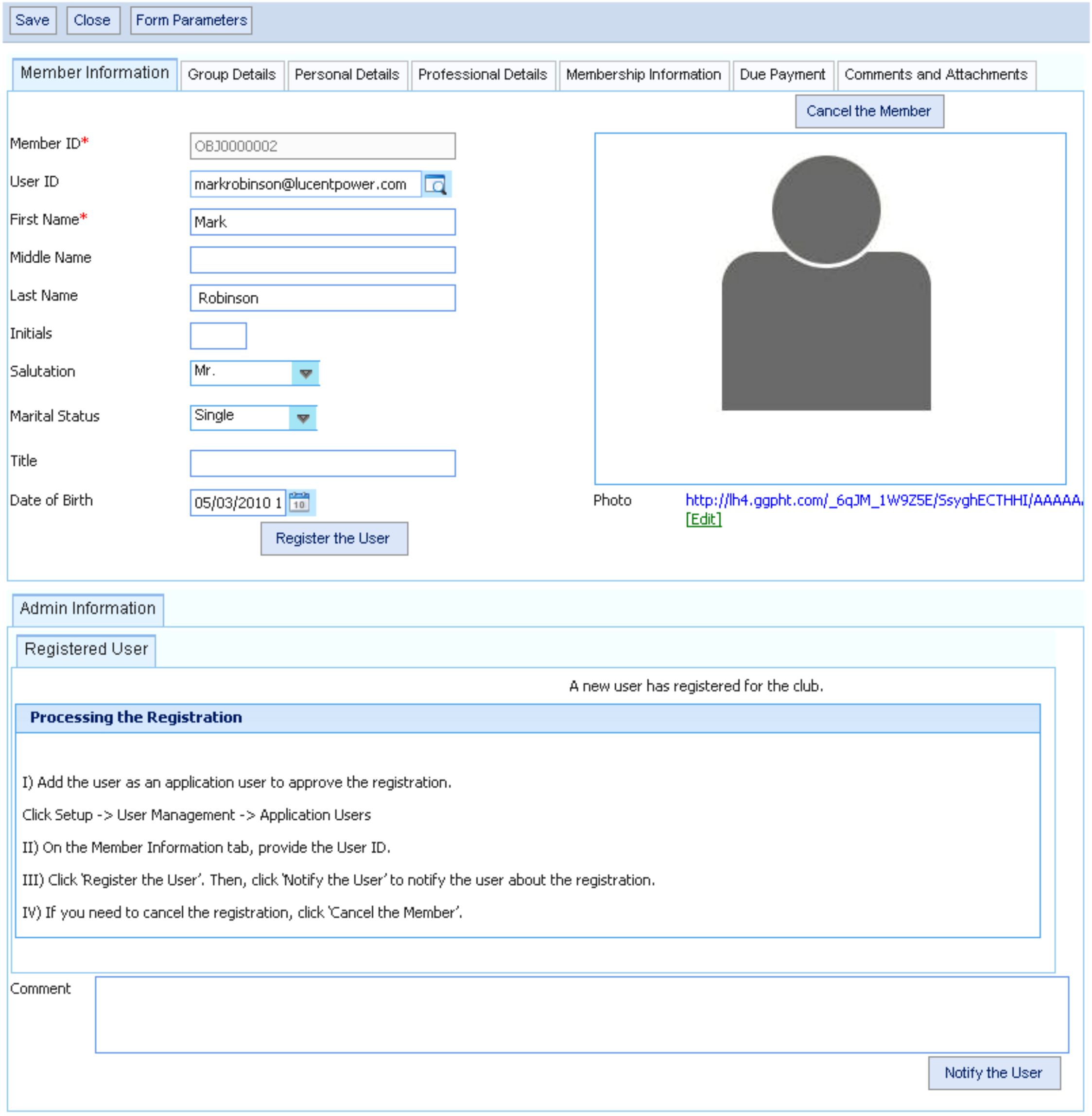
The Club Management Admin receives a notification that a new registration has been made.

4.2 Processing the Registration

The Club Management Admin receives a notification stating that a new registration was made. The Club Management Admin can do the following to process the registration.

> ***Note**: If the Club Management Admin approves the registration, the privilege of the New User must be changed from **New User** to **Member**.*

1. Click the **Admin** tab.
2. Click **View** for **Club Members**. The **Club Members** form appears.
3. Double-click the record with status as **Waiting for Registration**.
4. Click for **User ID**, select the user, and click **OK**.
5. Review the details and click **Register the User**.
6. Change the **New User** privilege of the new user to **Member** privilege through **Setup** → **User Management** → **Application Users**.
7. On the **Group Details** tab, do the following.
   a. Click **New** to add the new member to a group.
   b. Click for **Group Name**, select a group, and click **OK**.



8. On the **Due Payment** tab, do the following.
    a. In the **Total Payable Amount** field, provide the total amount to be paid by the member.
    b. In the **Current Pay Amount** field, provide the amount the member is paying currently.
    c. Click for **Dues Paid**, select the date of payment.
    d. In the **Membership Expires** field, provide the date of expiry of the membership.
    e. Click **Add the Due**.
9. On the **Comments and Attachments** tab, you can add comments, if required. Do the following.
    a. Click **Add Comment**. Do the following.
        i) Provide a **Comment Title** and provide text for the comment. You can also click **Add Attachment** to add attachments to the comment, if required.
        ii) Click **Save**.
    b. Click **Add Attachment**. Do the following.
        i) Click **Add Attachments**.
        ii) Provide the **File Path**.

iii) Provide a **Comment Title** and provide text for the description.

iv) Click **Save**.

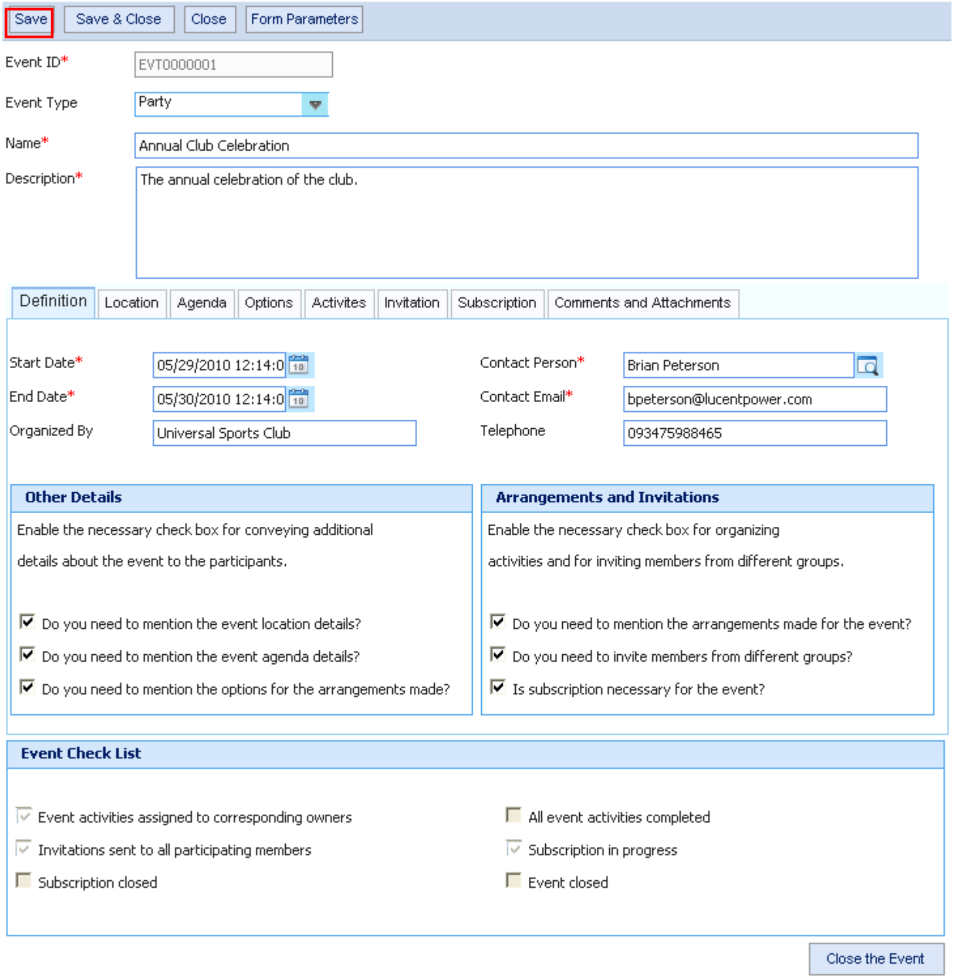
10. Click **Save & Close**.

5. Organizing a Group Event

> ***Note**: Only the **Group Admin** can organize a group event.*

The Group Admin can organize an event. Do the following.

1. Click the **Member Activities** tab.
2. Click **View** for **My Group Events**. The **My Group Events** form appears.
3. Click **New** to create a group event.
4. In the **Event Type** drop-down list, select one of the following:
    - **Meeting**
    - **Seminar**
    - **Conference**
    - **Course**
    - **Exhibition**
    - **Concert**
    - **Reunion**
    - **Party**
    - **Other**
5. In the **Name** field, provide the name of the event.
6. In the **Description** field, provide a short description about the event.
7. On the **Definition tab**, do the following.
    a. Click for **Start Date**, select the date on which the event begins.
    b. Click for **Contact Person**, select a contact person for the event, and click **OK**.
    c. Click for **End Date**, select the date on which the event ends.
    d. Provide details such as **Contact Email**, **Telephone**, and **Organized By**.



e. Click **Save**.

f. In the **Other Details** section, select the check box for **Do you need to mention the event location details?**, and the **Location** tab appears. On the **Location** tab, do the following.

   i) In the **Address** field, provide the address of the location where the event is scheduled to take place.

   ii) Provide other details such as **State**, **City**, **Country**, and **ZIP Code**.

g. Click **Definition** tab → **Other Details** section, select the check box for **Do you need to mention the event agenda details?**, and the **Agenda** tab appears. On the **Agenda** tab, do the following.

   i) Click **New** to add an agenda.

   ii) In the **Scheduled Event** field, provide the event which is scheduled to take place.

   iii) Click  for **Date**, select the date on which the event is scheduled.

   iv) In the **Time** field, provide the time at which the event is scheduled.

   v) In the **Note** field, provide a note, if any.

h. Click **Definition** tab → **Other Details** section, select the check box for **Do you need to mention the options for the arrangements made?**, and the **Options** tab appears. On the **Options** tab, do the following.

   i) Click **New** to add an option.

   ii) In the **Option** field, provide an option.

i. Click **Definition** tab → **Arrangements and Invitation** section, select the check box for **Do you need to mention the arrangements made for the event?**, and the **Activities** tab appears. On the **Activities** tab, do the following.

   i) Click **New** to add an activity and assign it to a member. The **Activities for the Event** form appears.

   ii) Click for **Activity Name**, select an activity, and click **OK**.

   iii) In the **Description** field, provide a description.

   iv) In the **Note** field, provide a note, if any.

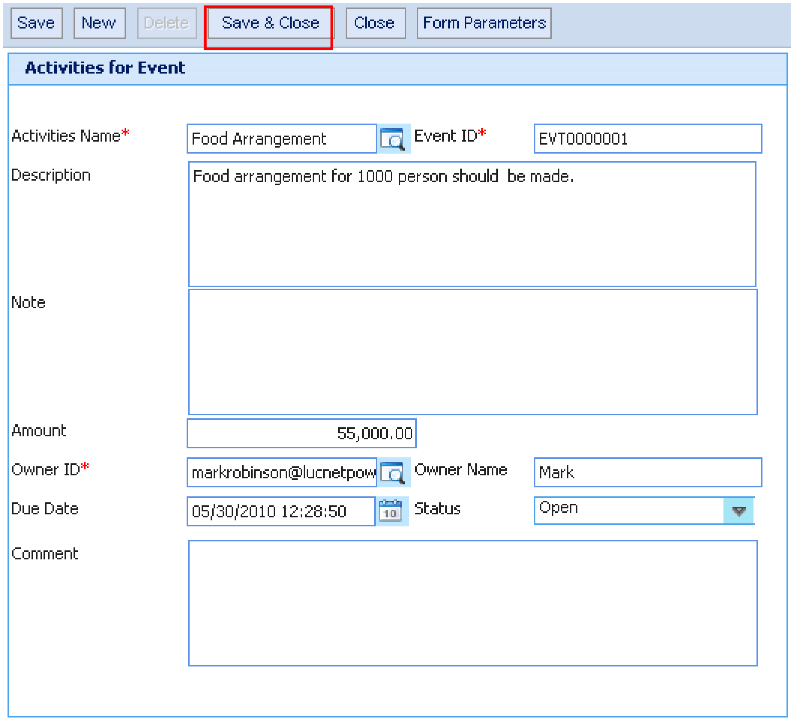
   v) In the **Amount** field, provide the amount required to carry out the activity.

   vi) Click for **Owner ID**, select a member to whom you want to assign the activity.

   vii) In the **Owner Name** field, provide the name of the member.

   viii) Click for **Due Date**, select the date before which the activity needs to be carried out.

   ix) In the **Status** drop-down list, the default value is **Open**.



   x) Click **Save & Close**.

   You have assigned an activity to a member successfully. A task is sent to the Owner.

j. Click **Definition** tab → **Arrangements and Invitation** section, select the check box for **Do you need to invite members from different groups?**, and the **Invitation** tab appears. On the **Invitation** tab, do the following.

   i) Click **New** to invite a group.

   ii) Click for **Group Name**, select a group you want to invite, and click **OK**.

   iii) Select the check box for **Does the invitee need to pay for the event?**, if the entry to the event is paid. In the **Price for Adult** and **Price for Child** fields, provide the entry fee for an adult and a child respectively.

   iv) Click **Invite Members**.

   You have invited the members of the selected group successfully.

k. Click **Definition** tab → **Arrangements and Invitation** section, select the check box for **Is subscription necessary for the event?**, and the **Subscription** tab appears. On the **Subscription** tab, do the following.

> ***Note***: *Select the check box for **Is subscription necessary for the event?** if you want to track the status of subscription or you want to invite a particular member.*

i) Click **New** to invite a member.

ii) Click for **Member Name**, select a member, and click **OK**.

iii) On the **Event Details** tab, click **Invite Member**.

iv) Click **Save**.

v) Then, click **Close**.

8. On the **Comments and Attachments** tab, do the following.

a. Click **Add Comment**.

i) Provide a **Comment Title** and provide the text for the comment. You can also click **Add Attachment** to add attachments to the comment, if required.

ii) Click **Save**.

b. Click **Add Attachment**. Do the following.

i) Click **Add Attachments**.

ii) Provide the **File Path**.

iii) Provide a **Comment Title** and provide the text for the description.

iv) Click **Save**.

9. Click **Save & Close**.

You have organized an event successfully.

You can also make use of the **Event Check List** to keep track of the progress and when the event is complete, click **Close the Event** to close the event.

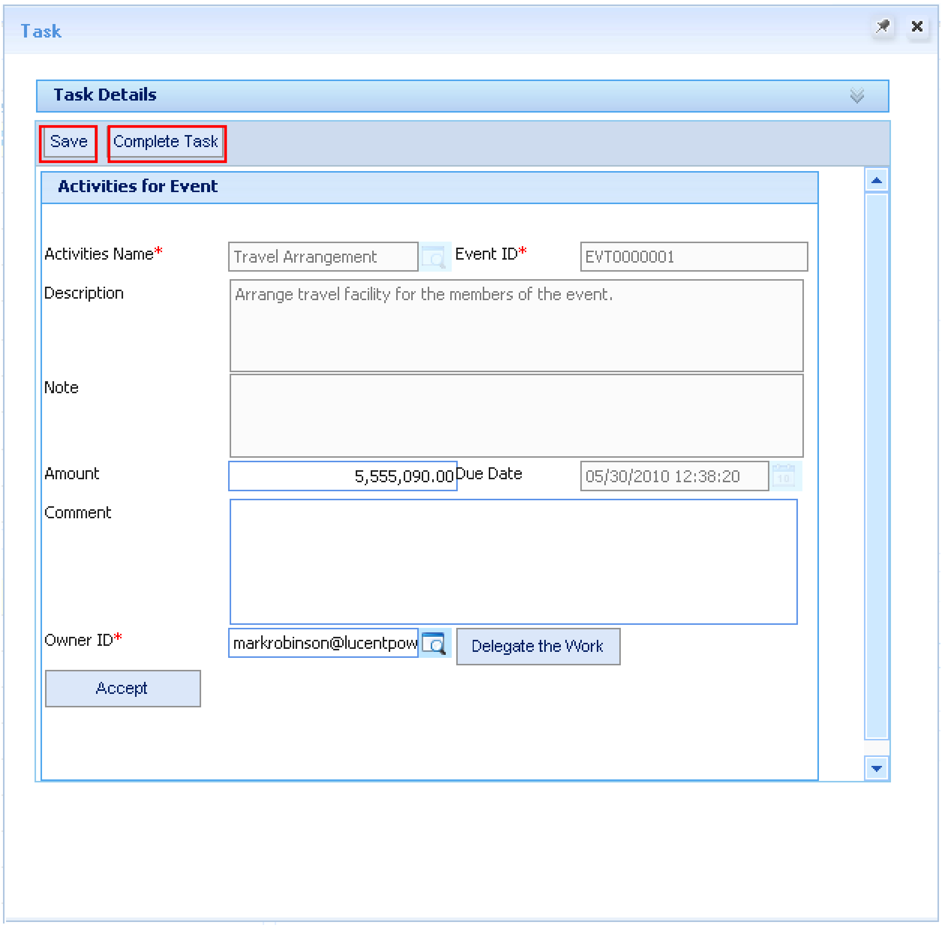
6. Accepting or Delegating an Activity

You can accept or delegate a work which is assigned to you. Do the following.

The member, who is assigned the work, receives a task to accept or delegate the work, which is available through **My Page** → **My Tasks**. He or she also receives an email with the task details.

Do the following to review the activity details and accept or delegate the activity.

1. Double-click the task. The task opens, displaying the details of the activity.
2. Review the details in the **Activities for Event** section and do one of the following:
   - **Accept**: Click **Accept** to accept the activity.
   - **Delegate**: Click for **Owner ID**, select a member to whom you want to assign the activity, and click **OK**. Then, click **Delegate the Work**.



3. Click **Save**.
4. Then, click **Complete Task**.

You have accepted or delegate an activity successfully.

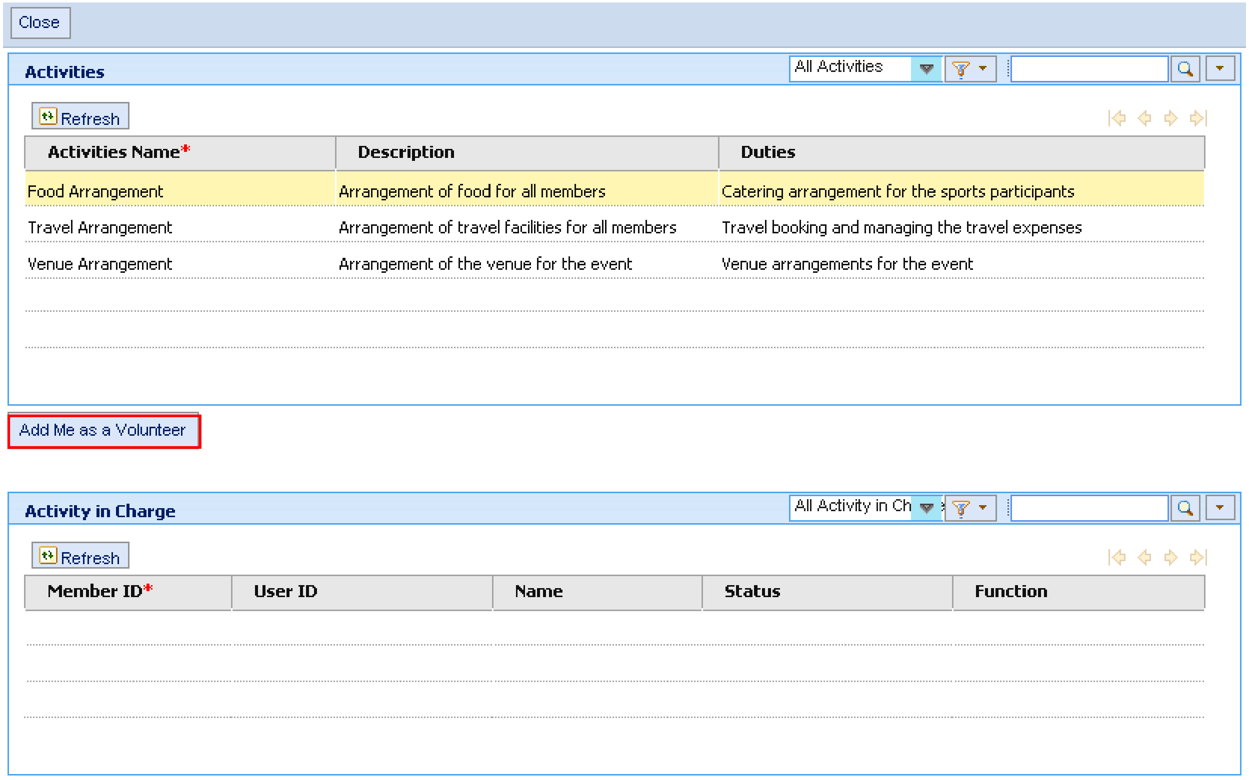
7. Adding as a Volunteer

You can add yourself as a volunteer for an activity and once it is approved by the Group Admin, the member can be a volunteer for the activity.

7.1 Requesting to be a Volunteer

You can request to be a volunteer for an activity. Do the following.

1. Click **Club Activities** tab.
2. Click **View** for **Add as Volunteer**.
3. In the **Activities** section, select the activity for which you want to be a volunteer.



4. Click **Add Me as a Volunteer**.
5. Click **Close**.

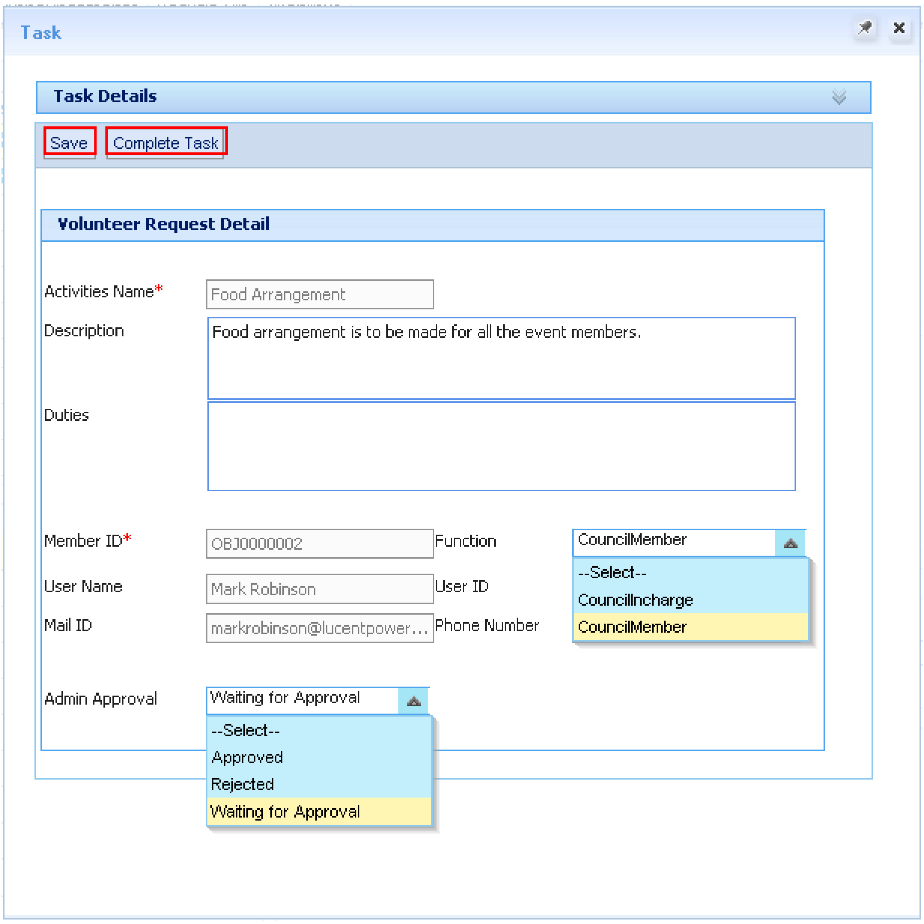
You have submitted a request to be a volunteer successfully.

7.2 Processing the Request to be a Volunteer

Once the request to be a volunteer is submitted by a member, the Club Admin, receives a task to approve the volunteer request. The task is available through **My Page → My Tasks**. He or she also receives an email with the task details.

Do the following to review the request and approve the task.

1. Double-click the task. The task opens, displaying the details of the request.
2. Review the details and in the **Volunteer Request Detail** section, select one of the following options from the **Admin Approval** drop-down list:
   - **Approved**: If approved, the member becomes a volunteer for the activity.
   - **Rejected**: If rejected, a notification is sent to the member who submitted the request to be a volunteer.
3. In the **Function** drop-down list, select one of the following:
   - **CouncilMember**
   - **CouncilIncharge**



4. Click **Save** and then, click **Complete Task**.

You have completed the task of processing the request successfully.

8. Reporting and Monitoring

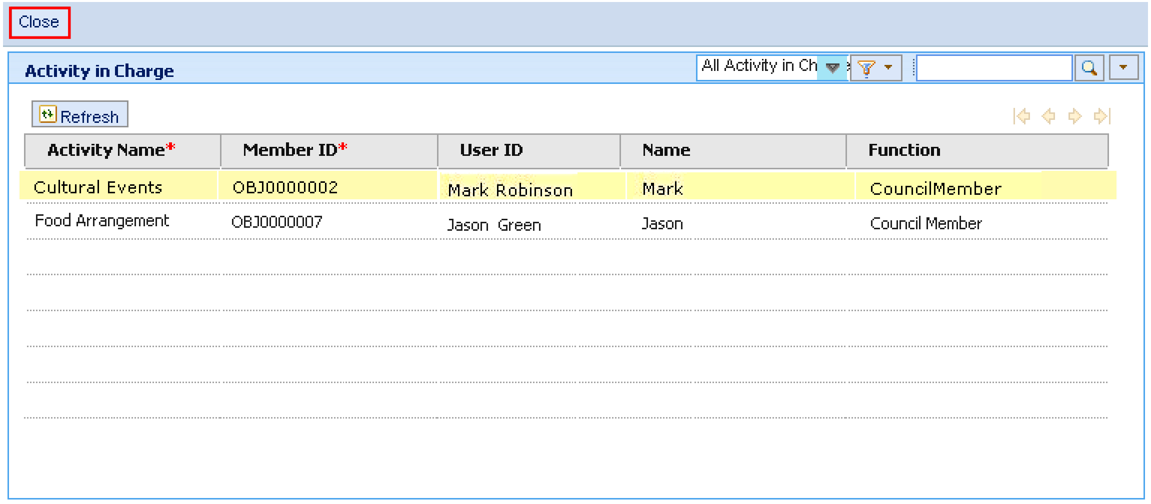
The **Club Management** MashApp enables you to monitor club management data through various forms, charts, and reports.

8.1 Forms

On the **Club Activities** tab, you can view forms to display data on the club management data.

For example, you can view the **All Volunteer List** form to view the list of all volunteers. Do the following.

1. Click the **Club Activities** tab.
2. Click **View** for **All Volunteer List.** The **Activity in Charge** form appears, displaying the volunteers in charge of each activity.



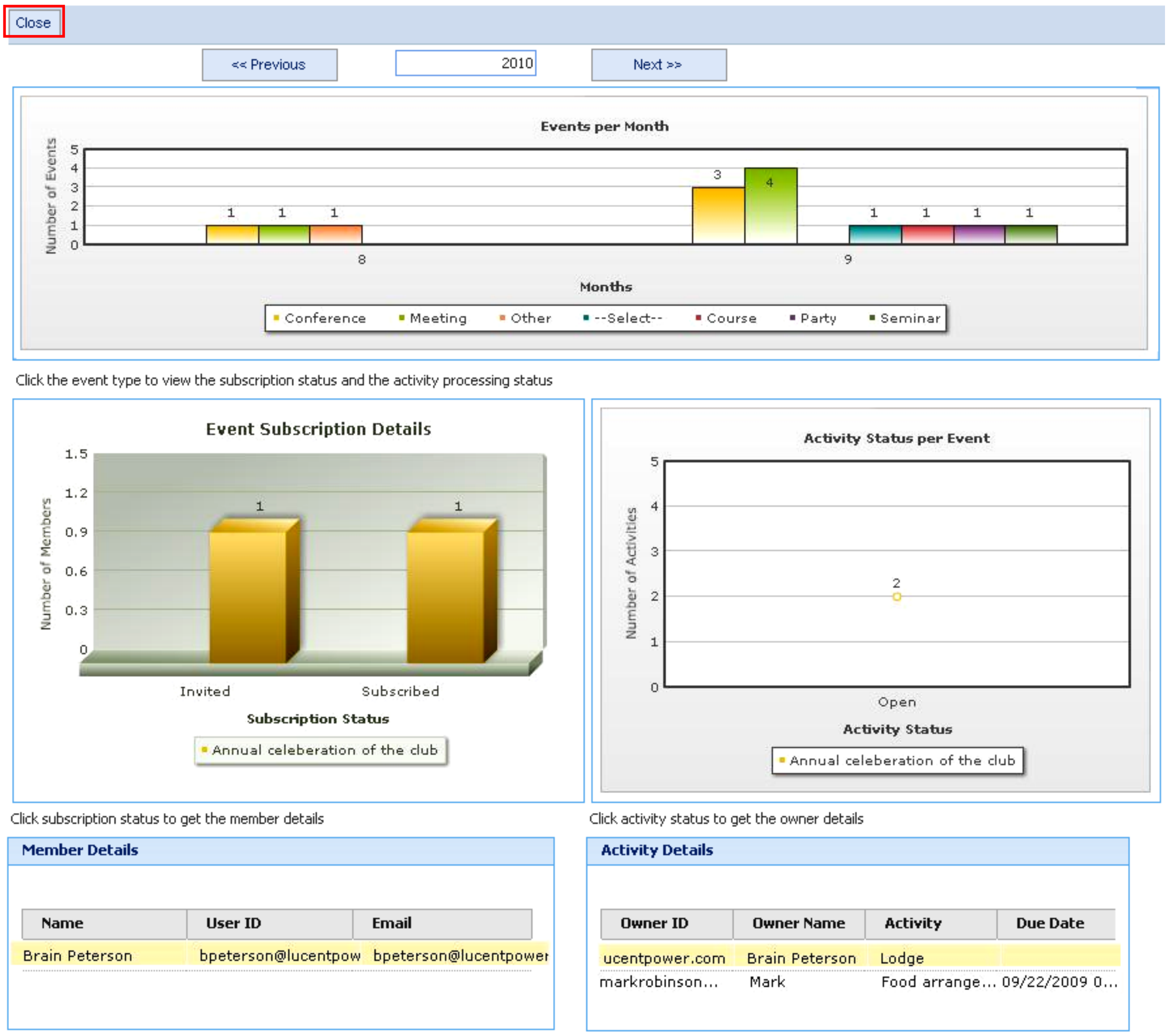
3. Click **Close**.

You can also view the **My Group Details** form on the **Members** tab.

8.2 Charts

On the **Charts** tab, you can view charts that display club management data. For example, you can view the **My Organized Events** chart to view the organized event details of the logged in user. Do the following.

1. Click the **Charts** tab.
2. Click **View** for **My Organized Events**. The Events per Month chart appears, displaying the events per month for the logged in user. You can modify the **Year** to view the status for another year.
3. Click any event type to view the subscription activity processing status.



4. Click **Close**.

You can also view the **My Events Details** charts on the **Charts** tab.

8.3 Reports

On the **Reports** tab, you can run various reports on club management data. For example, you can run the **Members of Club Management** report to view all the members in the club. Do the following:

1. Click the **Reports** tab.
2. Click **Run** for **Members of Club Management**. The **Report Wizard** appears.
3. Click **Run Report**.
4. Then, click **Download Report**. The report appears, displaying all the members of the club.

Members in the club

09/09/2009

User ID	Name	City	Telephone	Mobile	Email	Status
brianpeterson@lucentpower.com	Brian	New york	392874982	98327498	brianpeterson@lucentpower.co	Registered
edwardcollins@lucentpower.com	Edward	New york	74365989	83264923	edward@lucentpower.com	Registered
paulcarter@lucentpower.com	Paul	LA	783468273	39594289	paulcarter@lucentpower.com	Registered
ruthturner@lucentpower.com	Ruth	LA	4326434987	374692374	ruthturner@lucentpower.com	Registered
helenparker@lucentpower.com	Helen	LA	5645656456	785293802	helenparker@lucentpower.com	AskedforRegistration
lindamiller@lucentpower.com	Linda	Texas	4564564564	209349009	lindamiller@lucentpower.com	Initiated
markrobinson@lucentpower.com	Mark	Texas	56456456456	398740382	markrobinson@lucentpower.co	WaitingforRegistration
jonwhite@lucentpiwer.com	Jon	Texas	5646464646	3982749093	jonwhite@lucentpiwer.com	Registered
brain@lucentpower.com	Brain	Dallas	4568788322	234723040	brain@lucentpower.com	Registered
markwalker@lucentpower.com	Mark	Dallas	346545345	347938274	markwalker@lucentpower.com	WaitingforRegistration

Number of Records 10

You can also view the following reports on the **Reports** tab:

- **All Event Details**
- **Event Activity Status**

9. Conclusion

In this user manual, you learnt how to set up organization data and **Master Data** for the successful functioning of the MashApp. You learnt how to register and process for membership, organize group activities and subscribe for them. You even got a glimpse of how to monitor data through various forms, charts, and reports that are readily available to you.

10. Contact Us

To report issues or send feedback, contact us at: customercare@theprocessfactory.com