# Swimtopia Administrator Training

## May 2019

# Agenda

- Intro / Purpose of Meeting
- Site should have at least 2 admin accounts
- SwimTopia Registration
- Setting Up SwimTopia Users and Roles
- Matching Team Manager Roster to Registered Users
- Website Setup
  - Setting up Parent Declare Attending vs. Leaving to Coach
  - Setting Up Meets and Event Page
  - Setting Up Parent Job Signup
  - Setting Up Other Menus (look at other teams to see what hey have done)
- Setup Timeline

# SwimTopia Registration Page

- The Registration Page needs to include
  - GDSA Liability Waiver with Yes, I Agree checkbox and Initials
  - Lindsay's Law Facts and Video with Yes, I Agree checkbox and Initials
  - Concussion Parent Fact Shee with Yes, I Agree checkbox and Initials
- Other optional team items
  - Volunteering Policy
  - Meet Availability Policy
  - Concession Donation Policy
- All Parents must register and include their children
- Member should Login in if they have existing account otherwise registration will create one for them
- Registration Page should be open by  05/27/19
- Registration Page should be closed by 06/15/19 11:59PM
- We Pay can be configured to pay team registration fees via credit card.  This is configured via Setting->WePay Configuration.   There is a 2.9% + $0.30 transaction fee which can be paid by Pool (**Seller**) or paid by person registering (**Buyer**) using the "**Fees paid by Option**".

# Setting Up SwimTopia Users

- Types of Users
  - Parent – General user can view website and declare if children are attending meets, see meet for their children
  - Athlete – Usually added via Parent user via registration page
  - Admin – Full permissions can view and/or change entire website and all meet entries / info.
  - Coaches – Assigned via Roles and have limited admin access
  - Computer Scorers  – Assigned via Roles and have limited admin access
  - GDSA Reps  – Assigned via Roles and have limited admin access

# Setting Up Coaches Roles

- Coaches Role
  - Initially this role has No administrative permissions; you will need to update this on your team site (one-time update)
  - To update
    - Manage Team->Roles>Click on Coaches->Scroll down and select Some Administrative permissions
    - Suggest the following
      - **Read** Access to **People**
      - **Manage** access to **Swim Meets**
      - All other Scope have None

# Setting Up Computer Scorers Roles

- Computer Scorers Role
  - Initially this role has No administrative permissions; you will need to update this on your team site (one-time update)
  - To update
    - Manage Team->Roles>Click on Computer Scorers>Scroll down and select Some Administrative permissions
    - Suggest the following
      - **Read** Access to **People, Schedule**
      - **Manage** access to **Swim Meets**
      - All other Scope have None

# Setting Up GDSA Reps Roles

- GDSA Reps Role
  - Initially this role has No administrative permissions; you will need to update this on your team site (one-time update)
  - To update
    - Manage Team->Roles>Click on GDSA Reps>Scroll down and select Some Administrative permissions
    - Suggest the following
      - **Read** Access to **Communication, People, Schedule, Swim Meets, Jobs, Website, Blog Posts, Registration Forms**
      - **Manage** access to **Registrations**
      - All other Scope have None

# Setting Up SwimTopia Users – Head Coach

- Head Swim Coach
  - If not registered as a Parent then manually add them
    - Manage Team->People->New Parent Button
    - Reset their Password: Manage Team->People->Click on their name->Press Password Reset Button.   This must be done so they can setup password to login to site
  - Add account permissions so they can access team meet info (two options)
    - Make them **Admin** User via Manage Team->People->Make Admin button
      - Note: This allows them full access to entire website
    - Assign them **Coaches** Role  (not needed if they are an admin user)
      - Manage Team->People->Roles->Assign Roles…button->Under Coaches press Add/Remove button->Type their last name to select them->Save

# Setting Up SwimTopia Users – Assistant Coaches

- Assistant Coaches
  - **Not all assistant coaches need access** to meet entry info, only add ones that will enter kids into meet or pull reports.
  - If not registered as a Parent or Athlete then manually add them
    - Manage Team->People->New Parent Button
    - Reset their Password: Manage Team->People->Click on their name->Press Password Reset Button.   This must be done so they can setup password to login to site
  - If registered as a Athlete then you need to edit them and add email address followed by Password Reset
    - Manage Team->People->Click on their name->Press Edit Button->Enter email address->Press Update
    - Reset their Password: Manage Team->People->Click on their name->Press Password Reset Button. This must be done so they can setup password to login to site
  - Assign them **Coaches** Role
    - Manage Team->People->Roles->Assign Roles…button->Under Coaches press Add/Remove button->Type their last name to select them->Save

# Setting Up SwimTopia Users – Computer Scorers

- Computer Scorers
  - If not registered as a Parent or Athlete then manually add them
    - Manage Team->People->New Parent Button
    - Reset their Password: Manage Team->People->Click on their name->Press Password Reset Button.   This must be done so they can setup password to login to site
  - If registered as a Athlete then you need to edit them and add email address followed by Password Reset
    - Manage Team->People->Click on their name->Press Edit Button->Enter email address->Press Update
    - Reset their Password: Manage Team->People->Click on their name->Press Password Reset Button. This must be done so they can setup password to login to site
  - Assign them **Computer Scorers** Role
    - Manage Team->People->Roles->Assign Roles…button->Under Computer Scorers- press Add/Remove button->Type their last name to select them->Save

# Setting Up SwimTopia Users – GDSA Reps

- GDSA Reps
  - If not registered as a Parent then manually add them
    - Manage Team->People->New Parent Button
    - Reset their Password: Manage Team->People->Click on their name->Press Password Reset Button.   This must be done so they can setup password to login to site
  - Add account permissions so they can access team meet info (two options)
    - Make them **Admin** User via Manage Team->People->Make Admin button
      - Note: This allows them full access to entire website
    - Assign them **GDSA Reps** Role
      - Manage Team->People->Roles->Assign Roles…button->Under GDSA Reps- press Add/Remove button->Type their last name to select them->Save

# Importing Roster & Time from Hy-Tek Team Manager

**STEP 1:  Export Team Roster & Time History from Hy-Tek Team Manager**
- From the **File menu**, go to **Export > Generic MS Access**
- Be sure to select the option to export **athlete information, individual and relay results** and **click OK** to save the file. The file name should end in ".mdb".
- The resulting file will begin with "GenericData" and end with ".mdb".  E.g., "GenericDataMosasaurs.mdb". If the name doesn't resemble that, double check the steps above to make sure you are performing an export.

**STEP 2:  Upload the File to SwimTopia**
- Go to **Manage Team > Settings > Uploaded Files**
- Click **Add File** and choose the export file you just created on your local hard drive
- Click **Save**
- Send an email to **help@swimtopia.com** to notify us that there is a file waiting that needs importing (we are *not* automatically notified when you upload files to this area and these files are *not*automatically imported)
- Turnaround time for uploading new team history files is usually 24 hours.

- **If you have any problems uploading your file to this area of the site, email help@swimtopia.com for other options.**
- For additional help Search Swimtopia help center for "Importing Time Roster and History"  or use following link:
- https://help.swimtopia.com/hc/en-us/articles/200783358-Importing-Team-Roster-and-Time-History

# Removing Duplicate non-Matching entries from Registration and Imported Roster

- Imported Athletes may not match registered users. (e.g. Joseph vs. Joe). Use following to merge duplicate entries

- Manage Team->Settings->Data Maintenance Tools->De-duplicate Athletes button.

- Left side show registration name, right side shows imported Hi-Tek name.

- You can flip the merge by selecting the name entry you want to use.

- Press Merge button to compete merge.

NOTE: Continue to check back on this as athletes are registered for the season.

# Website Setup
## Setting up Parent Declare Attending vs. Leaving to Coach

- Default settings for meet are set via Team Meet Entry Preferences; for example:
  - Schedule->Click on the meet->Team Preferences
  - Assume "undeclared" athletes **will not** be participating in the meet
    - Coaches can always override athlete declaration
  - Allow parents/athletes to include additional notes to coach
  - Prompt for job sign-ups during meet declaration

─Participation Assumption─

Assume "undeclared" athletes | will not ▾ | be participating in the meet ❓

─Signup Options─

Ask whether athletes will be | available for/not available for ▾ | the meet ❓

☐ Allow parents/athletes to select/suggest individual events ❓

☐ Allow parents/athletes to indicate their availability for relays ❓

☑ Allow parents/athletes to include additional notes to the coach ❓

☑ Prompt for job sign-ups during meet declaration ❓

# Website Setup
## Setting up Parent Declare Attending vs. Leaving to Coach

- If allowing parents to declare participation in meets you must setup each swim meet with Open / Close dates.  This also applies to job signup for meets.

- Schedule->Click on the meet->Status Tab->

- Under Signup Status
  - Enter Open date/time
  - Close date/time
  - Check Automatically Open / Automatically Close
- Scroll down for Job signup status entries

| Status | Meet Setup | Entries | Resu |
|---|---|---|---|

**Signup Status**

🏊 **Meet entry online signup status**

◉ pending
◯ open
◯ closed

**Entries open at**

| 05/27/2019 📅 | 8:00 AM 🕐 |
|---|---|

☑ Automatically open

**Entries due by**

| 05/03/2019 📅 | 12:00 PM 🕐 |
|---|---|

☑ Automatically close

# Website Setup

- Setting Up Meets and Event Page
- Setting Up Parent Job Signup
- Setting Up Other Menus (look at other teams to see what hey have done)
- Other

# Website Setup Timeline

- Team page should be setup by  05/15/19
- Registration Page should be open by 05/27/19
- Registration Page should be **closed** by **06/15/19 11:59PM**