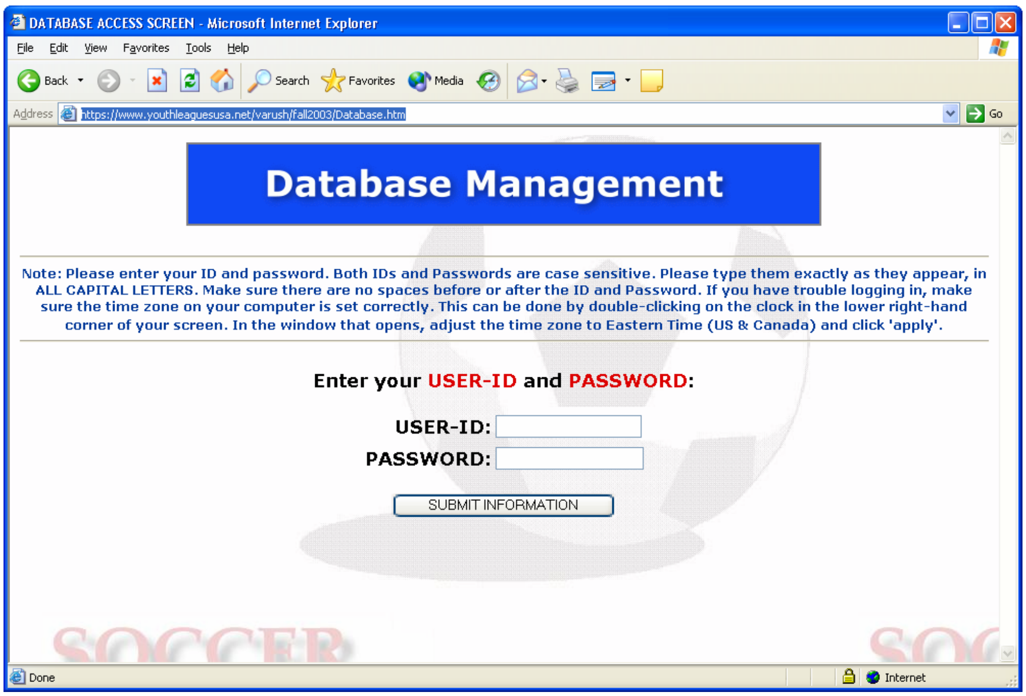
SRI Registration System User's Guide



Prepared by Youth Leagues USA

800-966-8605 X105
customersupport@youthleaguesusa.com

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1.0 Accessing the Database

Step 1
Use the following URL to access your database:

https://www.youthleaguesusa.com/sri/2004/3digitclub#/season/Database.htm

Use the login ID and password, given to you by a club official or by Youth Leagues USA staff, to access the database. The ID and password is case sensitive and must be entered in all CAPS. You will be welcomed to the system by name. If this name or title is incorrect please notify your club official immediately.

Step 2
On the initial main menu screen you will view a drop down menu of all functions accessible by you. Take time to review all functions. Each option you select will lead you to a new screen where you can view data, see a report of information or print information. On the bottom of most screens you will have navigation buttons that allow you to see more information, select and view information, delete information or return to the main. On the top left corner of most screens you will see boxes that allow you to sort and filter the information or report you are viewing. By sorting and filtering you are able to reduce the amount of information being viewed to only the information you want to work with vs. having to work with the entire database at one time. The buttons you see may vary based on your particular access rights and the function you are using.

Trouble Shooting
If you have trouble accessing the database in the login/password stage, make sure the password and ID is in the correct case. Both are case sensitive.

If you receive an error message indicating that your session has timed out, check to ensure that your Internet browser enables cookies. This can be found under Tools, Options in Internet Explorer. In Netscape Navigator this can found under Edit, Preferences, Advanced Settings. See the Youth Leagues USA privacy policy (www.youthleaguesusa.com/Privacy.htm) for an explanation of how we use cookies.

If you have any additional access problems, please call Youth Leagues USA Customer Support at 1-800-966-8605 x105.

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2.0 Main Menu Options – Descriptions

2.1 System Administration

This function is given only to the master user to manage who has access to the system and what information each person is able to use. The master user may also delete individuals or change an individuals ID and password. This is also the function used to add an e-mail address for each user of the system. When a person logs into the database with their ID and password and they choose to send a mass email, the “From” and “Reply-to” email address comes from the access record associated with that ID and password.

System access rights for any database access positions can only be set up by Youth Leagues USA ‘s Customer Support staff. Access levels to work with information in a database may be set at 3 different levels:

1) **Summary Level** – A person can only see a summary listing of the information.
2) **Detail Level** – A person has the ability to open up a record from the summary view and see the detailed information in that record.
3) **Modify Capability Level** – A person can modify the information of an opened (detail) record, save changes or delete the record.

The types of databases are players, team officials, board members, general volunteers and referees. All reports in the system (like the Donation report or Financial report) are either set as available or not available for each access position.

The system access rights that have been pre-setup in your system are:
Master User: Full access to all options
Registrar: Full access to all options
President: Summary/detail view only of player, coach, general volunteer and referee data (no modify capability), mass email
Treasurer: Summary/detail view only of player data (no modify capability), donation report, financial report
Recreation Director: Summary/detail view of recreation program player and coach data (no modify capability), full team management, mass email
Competitive Director: Summary/detail view of competitive program player and coach data (no modify capability) , full team management, mass email
Director of Coaches: Summary/detail view only of all coach data (no modify capability)
Director of Referees: Summary detail view only of all referee data (no modify capability)
Field Scheduler: Team management

Age Group Coordinators: Summary/detail view of player and coach data (no modify capability) in their respective age group, full team management, mass email

IMPORTANT NOTE:
When updating your system access registrant's file, keep the position titles unchanged. Just change the name, phone numbers and email address of the person in that position then change the ID and Password.

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2.2 Registration Status Report

The Registration Status Report is a quick-view report to find out your registration numbers by program, age group, paid/unpaid, refunds and wait list.

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2.3 Age Group Wait List/Shutdown Report

This report allows users to either wait list by age group or shut down registration by age group.

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2.4 View Players

This option provides access to information in the player database. You may sort/filter the player information by Program, Age/Gender Group and/or Alphabetically. If you have master access you may view, edit, and delete players using this option. At the very minimum access level you may view a summary page of players but may not see individual applications and will not have the ability to edit or delete players. A color code system indicates if players are unpaid, waiting list, or refund status.

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2.5 View Team Officials

This option provides access to information in the team officials database. You may sort/filter the coach/assistant coach/team manager information by Program, Position, Age/Gender Group and/or Alphabetically. If you have master access you may view, edit, and delete team officials using this option. At the very minimum access level you may view a summary page of team officials but may not see individual applications and will not have the ability to edit or delete team officials.

2.6 View Board Members

This option provides access to information in the board member database. You may sort/filter the board member information alphabetically. If you have master access you may view, edit, and delete board members using this option.

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2.6 View General Volunteers

This option provides access to information in the player database about general volunteers. These are positions that were selected by check box in the parent section of the player registration form. You may sort/filter the general volunteer information by Program, Position, Age/Gender Group and/or Alphabetically.

Only summary level information is available for this report. If you wish to edit this information you need to go to the corresponding player application.

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2.7 View Referees

This option provides access to information in the referee database. You may sort/filter the referee information alphabetically. If you have master access you may view, edit, and delete referees using this option. At the very minimum access level you may view a summary page of referees but may not see individual applications and will not have the ability to edit or delete referees.

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2.8 Team Management

This is the function used to assign players and team officials to teams and create rosters. Based on your access level you are able to select by Program and Age Group/Gender. After making the selection, you will see a listing of all teams formed within the Program and Age Group/Gender you have selected. You may either view teams or add teams from this screen. From the view teams screen you can select team officials, players, delete team members, and print rosters for the team. When you choose to add a team a blank team management screen will appear. Team ids are automatically assigned by the system. You will be able to assign coaches, assistant coaches, team managers, players, team name and team colors. In each drop down field all team officials or players that are currently unassigned are available for selection. You have two buttons that you may use to see additional information about players in the selected age group. For instance if you form teams by school attended, you select the 'School Attended' button and you will see a pop up window appear with all player information sorted by school attended. The second button will allow you to view information sorted alphabetically. These pop up windows contain other important information like special requests and contact information that is useful for assignment purposes.

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2.9 Send Mass E-mail

This option allows you to send emails to groups of people in your databases. The choices for groups you can select depends on your access level. You may see all groups or you may have only the ability to communicate to the specific age group that you are responsible for. Recipients receive an e-mail addressed directly to them based on the e-mail address listed in their database registration record. Only the individual recipients email address shows in the email to protect the privacy of other recipients in a group email. A copy of the email is automatically sent to the sender for your records.

To send an email you should first select your recipients from the categories offered. Type a subject in the subject box field and type the text of your email in the message box field.

TIP: If you chose to "Email Unpaid Players", this email checkbox is set up to look for all unpaid players in your database for the list of email recipients. You cannot specify to email an age group with this option. Please keep the player email box defaulted to "No Players" when you use the unpaid players email option.

TIP: To select more that one age group for a mass email, while pressing the "Ctrl" key, click each age group you desire to email!

TIP: The mass email system does not allow for attachments. Allowing attachments would put a large strain on the email system as well as open up the ability of emailing viruses. An alternative way to send documents to your group is to put the file on your website as a Word document and/or PDF file and then include the link to that file in your mass email. You must type the full address of your link so it will appear as a 'hot link' when your email is received. This means it will be blue, underlined and users can just click on the link to go to the document.

TIP: The database functions on a timer, so when the system detects a certain period of inactivity, you will logged out of the database. If you are sending a lengthy email or multiple emails, type your email into a text editing software first and then copy and paste your text into the message box. This keeps you from losing anything you typed if you are timed out. It also allows you to spell check your message before you send it.

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2.10 View Incomplete Registrations

The incomplete registration file is an extremely important report on your system. It helps you identify possible problems with your registration process. Incomplete registrations occur when the registrant does not continue to the payment page, on-line payment is declined, and/or the on-line session was interrupted. This view allows you to view information about an incomplete registration and to either remove the registrant from the Incomplete Registration view or, if appropriate, move the information into your completed registration database.

NOTE: Incomplete registrations are not an indication of a problem with the system but are usually an indication that a user lost their Internet connection during registration, did not follow the directions to fully complete their registration or had their payment by credit card denied.

The key to reading the Incomplete Registration report is to look at the error code that indicates at what stage the user reached before their registration terminated. The error codes and their definitions are as follows:

ERROR CODE 1: MEANS A REGISTRANT STOPPED AT THE SUMMARY PAGE.

One of the most common ways an individual is placed into this file is they may have been interrupted at work, had call waiting on their phone which may have caused them to lose their Internet connection, or in some cases, the registrant disregarded all prompts, messages and warnings and felt that they were done prior to reaching final Certificate of Registration page. For whatever reason, if the person stops after pressing the submit button on the report then they will show as an error code 1 in your Incomplete Registration report.

The first step in resolving an error code 1 is to look in your completed database and see if indeed the person did re-register at another time and is complete. If that is the case then you can click the button to remove their record from the report. If they are not in the completed database then you may click on their email address to send them an email or call them to let them know that their registration was incomplete. You may then click the button to remove their record from the report. Alternatively, you may ask them to mail a check or take their credit card information over the phone (if you have access to your credit card processing account) and then click the button to transfer them to the completed file. Be sure that they are marked as unpaid in the completed file until you receive their payment.

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ERROR CODE 2: MEANS A REGISTRANT STOPPED AT THE PAYMENT SOLUTION PAGE

An error code 2 means that a registrant filled out their form, submitted the form, selected the "Proceed to Payment Solution" button, selected to pay their fees by credit card or mail-in check (if applicable) but never proceeded to the payment page. If a registrant stopped at this point, they become and error code 2.

For an error code 2, you will want to check and see if the registrant is in the completed file. You will then want to go into your authorize.net credit card account and check the transaction activity for the date involved to see if possibly the registrant has been charged but is showing as incomplete. This can occur if network problems exist during the credit card transaction. If they are not in the completed file and not in the authorize.net records then you should notify the person that their registration was not completed. If they are not in the completed file but are in the authorize.net records then you should click the button to transfer them to your completed file and make sure their record is marked as paid.

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ERROR CODE 4 MEANS THE CREDIT CARD WAS NOT ACCEPTED

This is usually due to a registrant using the wrong type of credit card, typing in an incorrect card number, or using an expired card. You may find that the registrant then corrected their error and had a successful transaction. In this case, you can remove the registrant from the Incomplete Registration file.

ERROR CODE 3: Is a very good thing!
There is an error code 3, but you will never see it. The "3" in the player record indicates that this is a completed registration. These "error code 3" players are the players you see in your database!

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2.11 Donations Report

The donation report is sorted alphabetically. This report is useful to follow the trend of online donations and reconcile the accounts for the Treasurer. With the "clickable" email address, you can easily send a "Thank You" email to the individuals that donate.

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2.12 Information Received Report

This report is a combination of the Birth Certificate Received Report and the Payment Not Received Report. This sort/filter options for this report include program, age group, registrant status, alphabetic and date range based on the registration date stamp. From this one report, you can mark checks received, reflect the check number and check off that a birth certificate was received, all at one time on one easy to use report.

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2.13 Download Data

This function is useful to manipulate and collect data for off-line purposes (such as mass mailings etc.). The only caveat is changes made off-line are not automatically registered with the system and must be changed on-line. You have the option to download data from all persons whom you collect from i.e. players, coaches, and volunteers. A separate window will open with instructions to download.

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2.14 Waiting List Report

Some clubs/ leagues offer a waiting list. If so this report is used to mark waiting list players as active. The sort is done alphabetically.

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2.15 Refund Report

The refund report can be sorted by date range. This report is useful for tracking and accounting for player refunds by the Treasurer or club bookkeeper.

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2.16 Financial Report

The Financial Report is a report that gives those individuals within a club who deal with the clubs finances the ability to research player registrations, types of payment, fee charged, invoice number, donation amount, etc. This report is useful in reconciling the clubs accounts. The sort/filter option include program, payment method, registration date range or order id.

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3.0 Frequently Asked Questions (FAQ) Questions and Answers:

3.1 HOW DO I ACCESS THE DATABASE?

See Section 1.0

3.2 WHAT IS THE "STATUS" FIELD AND WHY IS IT IMPORTANT?

The "Status" field is located inside of the player's record, right above the player's name. This field reflects the current status of that player. Most players are listed as "Active". If a player registers after a "Wait List" start date, their status is listed as "Wait List". Another status is "Refund" which indicates a player received a refund. Wait list and refund players do not appear in team management and do not receive emails.

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3.3 HOW DO I MARK A WAIT LIST PLAYER AS ACTIVE?

To make a wait list player an active player, you can either change the player's status within the record from "Wait List" to active or, or go to the "Wait List Report" and select the desired player from the list then click the "Mark as Active" button located on the bottom of the form. Once the player's status has been changed to "Active" and they have been marked as paid, this player will then show up in Team Management as an unassigned player, available for placement on a team.

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3.4 HOW DO I ALLOW A PLAYER TO PLAY IN A DIFFERENT AGE GROUP OR PROGRAM?

Within a player's record there is a program and an age group field. To change the age group, just select the desired age group from the drop-down and save your changes. To change the program, select the program and then save your changes. Usually programs have different age groups, so after saving your program change you should verify and/ort set the age group to the correct selection and then save your changes again.

NOTE: If the player has already been assigned to a team, then the player will be deleted from that team if you change the player's age group.

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3.5 HOW DO I EMAIL A TEAM ROSTER?

The Youth Leagues USA Team Management system does not support the emailing of player rosters. Emails are not secure and most rosters contain confidential information about under age players. This is in compliance with the Children's Online Privacy Protect Act (COPPA) which prohibits the sending the personal information about a child via electronic means in a format that is not secure.

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3.6 HOW DO I SEND AN EMAIL TO MULTIPLE AGE GROUPS?

If you need to send the same email to multiple age groups, for instance, all girls age groups, this can be accomplished by holding down your "Ctrl" button on your keyboard and clicking the desired age groups. Each age group selected will be highlighted to reflect that it is selected.

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3.7 HOW DO I SEND AN EMAIL TO ONLY UNPAID PLAYERS?

Within the mass email systems there is a checkbox to "Email Unpaid Players". Checking this box will allow you to send an email to only the unpaid players.

IMPORTANT NOTE: DO NOT MAKE ANY SELECTION UNDER THE "PLAYERS" OPTION. This will cause the email to go out to all players in the selected age groups!

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3.8 HOW DO I SEND AN EMAIL TO A TEAM?

The Youth Leagues USA database gives you the ability to send an email to a team. This option is not located under your "Send Mass Email" option. To send a mass email to a team, go into Team Management, go to the desired team and open up the team record. At the bottom of the page for that team, you will find a button to "Email Team". This will send an email to all players and team officials assigned to this team.

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3.9 HOW DO I EMAIL AN ATTACHMENT?

The mass email system does not allow for attachments. Allowing attachments would put a large strain on the email system as well as open up the ability of emailing viruses. An alternative way to send documents to your group is to put the file on your website as a Word document and/or PDF file and then include the link to that file in your mass email. You must type the full address of your link so it will appear as a 'hot link' when your email is received. This means it will be blue, underlined and users can just click on the link to go to the document.

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3.10 HOW DO I FIND A LOST PLAYER?

There are several steps that can be taken to try to find a lost player, try the following:

- Check for the player under their first name, parent's often enter the name in backwards.
- If you know the player ID number and/or date of registration, use the Financial Report and search for that ID# or Date. If a parent enters an unknown character or a space in front of the name, the player will not show up in the alpha player sort, but they may show up in the Financial report. If

you find the player in the Financial Report and this is the case, contact Youth Leagues USA Customer Support to have the name corrected.

- Do a player download. If you can find some part of the registration, such as the player number and payment information, and all or most other information is blank, this was a registration done with a Macintosh computer. You may then follow the below steps.
- If the player still cannot be found and you know the date of registration, check for a transaction under the parent's last name and/or date in your Authorize.net account. If you find a transaction, please contact Youth Leagues USA and we will try to locate the player. It could be that the registration was done using a Macintosh computer and the record is damaged. If this is the case, have the parent re-register but NOT PAY, have them stop at the payment page. You can then go into your "Incomplete Registration Report" and transfer the player to the paid player database. You can then go into the player's record, mark the player as paid and then write a note in the "Editor's Comments" field to reflect the date and invoice number of the payment that corresponds with that player.

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3.11 HOW DO I RESEARCH A TRANSACTION AT AUTORIZE.NET?

If your club uses Authorize.net as its credit card gateway, you can research the credit card payments in the following manner:

- Go to: https://secure.authorize.net/
- Enter your club's Authorize.net ID and Password
- In the left frame, select "Search and Download"
- You can then do a sort by either transaction date, parent name or transaction ID, which is usually the same as the player ID assigned at the time of registration.

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3.12 HOW DO I MANUALLY PROCESS A CREDIT CARD TRANSACTION (Charge or Refund) AT AUTHORIZE.NET?

If your club uses Authorize.net as its credit card gateway, you manually process a credit card payment in the following manner:

- Go to: https://secure.authorize.net/
- Enter your club's Authorize.net ID and Password
- In the left frame, select "Virtual Terminal"
- Fill out all of the requested information. Shipping Information can be omitted and you can use the player's ID# as the Transaction number.
- You can either "Charge" or "Refund", but make sure that "Authorize and Capture" is checked.

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3.13 HOW DO I CHANGE THE POSITION TITLE OR NAME OF A SYSTEM ACCESS REGISTRANT?

Changing the position title of a system access registrant DOES NOT change the access rights associated with that record.

When updating your system access registrant's file, keep the position titles unchanged. Just change the name, phone numbers and email address of the person in that position then change the ID and Password.

When a person logs into the database with their ID and Password and they choose to send a mass email, the "From" and "Reply-to" email address comes from the record associated with that ID and Password.

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3.20 HOW DO I GET HELP ON THE WEEKEND?

Contact YLUSA Customer Support at customersupport@youthleaguesusa.com

3.21 HOW DO I GET A CAMP OR CLINIC REGISTRATION FOR MY CLUB?

Contact YLUSA Sales at info@youthleaguesusa.com

3.22 HOW DO I DO REGISTRATION FOR A TOURNAMENT?

Contact YLUSA Sales at info@youthleaguesusa.com

3.23 HOW CAN I DO TEAM GAME SCHEDULING?

Contact YLUSA Sales at info@youthleaguesusa.com

3.24 HOW DO I SET UP MY CLUB'S WEBSITE THROUGH YOUTH LEAGUES USA?

Contact YLUSA Customer Support at customersupport@youthleaguesusa.com

3.28 WHY CAN'T REGISTRANTS USE A MACINTOSH COMPUTER TO REGISTER?

The systems we provide are custom developed for each club/organization we support. While we have endeavored to follow appropriate programming standards, we still find that there are many incompatibilities between, browsers, operating systems, ISP's and hardware platforms. The cost to test on every environment is not affordable so we have had to focus our resources on those environments that exist for the great majority of our users. For now, one hardware platform we have elected not to support is the Macintosh environment. It is not a preference of one product over another but pure economics in terms of trade offs between price, cost and support for the majority. We realize this does present a problem for a small number of our possible users, but felt most people would have many other options in finding a computer environment that we do support. We are sorry for the inconvenience and hope that as standards are improved and our own resources expand we will be able to better support you in the future.

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4.0 TIPS FOR ALL USERS

- Do not pass out or exchange password and ID's in order to preserve integrity of the database.
- If you edit a player's date of birth, you MUST also change age group prior to saving changes. The system converts the date of birth on the original application at the time of submission. Within the database, there is no scripting running to re-compute the program or age group.
- Always SAVE changes when editing applications.
- Delete means DELETE. Use wisely.
- You cannot open a player's record from the Incomplete Registration report.
- If you have a missing player in your database, check under the first name. Parents often enter the names in backwards. If the player is still missing, and you know the player ID#, use the Financial Report and do a sort on the player ID#. If a parent entered the last name with a space at the beginning of the name, the player will not show up under the alpha sort. The space is recognized as a character, but not as an alpha character.
- All Youth Leagues USA database reports and views can be copied into a spreadsheet. Just open up your spreadsheet program, copy the desired information from the Youth Leagues USA database and then paste it into the spreadsheet.
- When working in Team Management forming a team, use reduced windows instead of a full window. Re-size the Team Management Team window in the bottom 2/3 of your screen, then do your desired player sort and re-size it to the top 1/3 of your screen. This way, you do not lose sight of the player sort as you build your team.

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5.0 Should you ever require assistance, please contact:

Youth Leagues USA Customer Support at

customersupport@youthleaguesusa.com

703-815-8900 X105

800-966-8605 X105

Emails to the above address go to all Youth Leagues USA Customer Support Analysts and to the President of the company, Mr. John Jackson. Customer Support Emails are monitored on weekends, holidays and weekdays. Contact customer support about Youth Leagues USA doing your club's website!

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Should you ever require additional products or services, please contact:

Ms. Lisa Olson
Youth Leagues USA National Sales & Marketing Director

sales@youthleaguesusa.com

703-815-8900 X108

800-966-8605 X108

Youth Leagues USA has a wide variety of services to meet and exceed your club's needs. We build registration forms and databases for Camps/Clinics, Tournaments and offer a Team Scheduling package. If you have a need, call us!

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