Membership Reporting System

Training Manual

September 2018 Version

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Download editable Word version from Bowls BC website

This manual is maintained by Robert Ascroft.
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robertascroft@outlook.com

INTRODUCTION

Why Is Bowls BC Implementing a Membership Database?

Each year Bowls BC collects club information regarding the number of members, genders, age groups, etc. This information is sent to Bowls BC in all formats; Excel files, Word files and sometimes by email.

In order to standardize collection and to have more timely access to current data, Bowls BC has implemented a Canadian cloud-based membership data program, SUMAC.

Bowls BC uses the mandatory information collected for grant and funding applications to ViaSport and Sport BC. The financial support from these agencies is partly dependent upon knowing the number of club members in various categories.

Further, it helps Bowls BC analyze membership data to strategize for membership growth and participation throughout the Province.

Your club's participation will help Bowls BC continue to support and grow this sport of bowls in BC.

Points to Consider in Adopting Sumac:

- Your existing Excel spreadsheet database can in mapped and uploaded into Sumac.
- Sumac templates require NO computer programming skills. If you can use Excel, you can master Sumac.
- Sumac is comprehensive enough to manage all of your club's membership recording requirements.
- You only need a computer connected to the internet and Sumac is cloud-based so uses only a tiny part of your hard drive space.
- Your club's member's information is stored in a secure Canadian data centre and access is controlled by the Bowls BC System Administrator.
- Sumac can integrate emails, generate PDF lists for online distribution or print.
- Best of all, Sumac is free to clubs; no catches, no hidden costs.

What We're Doing in This Session

This manual provides:

1. Step-by-step i**nstructions for entering the Bowls BC required Mandatory information**,
2. Instructions on entering **Optional** information that clubs can use to store all their membership information, usually eliminating the need to maintain separate spreadsheet or word-processing programs,
3. Some miscellaneous function information,
4. instructions for loading the Sumac database and your club's demo database.

Text highlighted in yellow are features and warnings.

Taking the Next Step

If you like what you see today:

1. Your contact information will be sent to Brian Sutton. Complete the access request form(s) *(in the Appendix)*, scan and email them to Brian at membership@bowlsbc.com
2. Download a trial version of Sumac at www.sumac.com if you have not already - *See page 32 for instructions.* This is a full version of Sumac; however, **Bowls BC is only implementing the Membership module**. You will also be requested to load the latest version of Java. Internet access is required to use the system at all times.
3. Brian will email your access ID(s) and password(s) and a copy of your club's database (Names only) - *loading instructions on page 50.*

Club Directorships Update

May 1st: Review all your club directorship entries in the Membership Database and make the required changes. Keep these details current to ensure your club receives timely communications from Bowls BC and their Regional Districts.

Review these details after every AGM or whenever Director responsibilities change and at the beginning of every Bowling Season.

Bowls BC needs club directors' correct email addresses to be kept current ALWAYS.

Affiliation Fees

The table on the next page identifies when affiliation dues are to be submitted and when the Membership Database must be updated. **Reconciliation of the Affiliation payments can only be made when the Membership data has been input**.

Note that all members have their membership type (Full Member, Junior Member, etc.) set to blank on May 1st each year. ***This is the only data that is reset each year.***

Affiliation fee per bowler is $32. This amount is NOT adjusted for bowlers who join at different times, including later in the season. A bowler for whom you submit fees is anyone who bowls at your club who have not paid an affiliation fee at another club. This includes members who are: **Full, Junior, New and Visually impaired**.

Bowlers who do NOT have to pay the affiliation fee are: **Full member (2nd club); Social only** and **volunteers** who are not playing.

Database Update & Affiliation Fee Submission Deadlines

Here are the deadlines on Affiliation Fee Collection Process:

May 01	• Membership Database reset for the new year, This done by Bowls BC • Review Club Director entries in Membership Database.
June 15	• Clubs complete the update of membership data online to the Membership Database • Clubs pay affiliation fees due to date
Sep 15	• Clubs complete the update of membership data online to the Membership Database • Clubs pay affiliation fees due to date
Feb 28	• Indoor Clubs complete the update of membership data online to the Membership Database • Indoor clubs pay affiliation fees due to date

June 15th Payment: The total amount due June 15th is the total affiliation fees collected up to May 31st for the current playing season (Apr 1 – Mar 31). Enter the amount of affiliation fees you paid by June 15th in the blue field. Update the Membership Data following the instructions below. This should be done as soon as possible after a member is registered before June 15th and at any time a member is registered and pays club membership fees.

September 15th Payment: The total amount due September 15th is the total affiliation fees collected up to August 31st, less the amount already paid on or before June 15th.

Feb 28th Payment (Indoor Clubs): The total amount due February 28th is the total affiliation fees collected after September 15th.

Affiliation fees must be submitted to:

The Treasurer, Bowls BC.
293 West Kings Road
North Vancouver BC
V7N 2M1

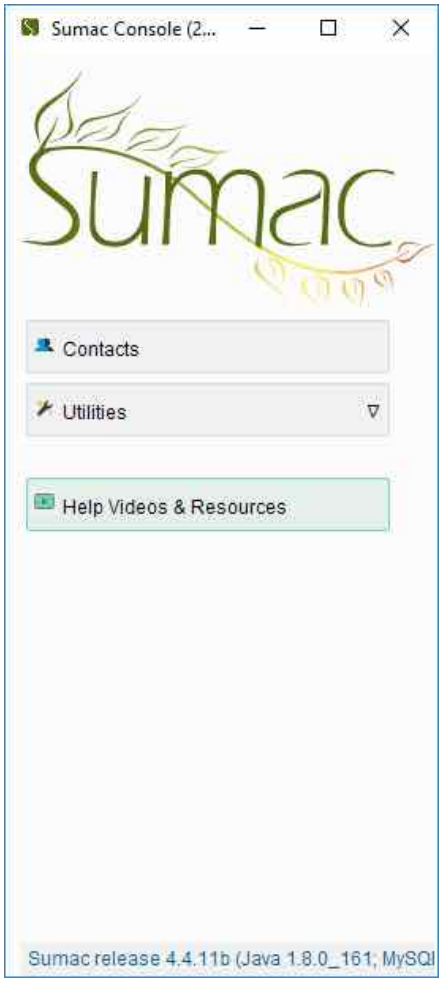
Who Has Access to Your Data and for What Purpose

Position	Security
Club Membership Director	Can Add and Change their Club Member Data Can inactivate Member Data Can reactivate Member Data Can Change Director records in Club Organizations Can Print reports of Club Directors within Region
Club Directors	Can only View their Club Member Data Can View Club Directors in Region Can View Regional Directors
Regional Directors	Can View all Club Member Data within their Region Can View Club Directors in Region Can View Regional Directors
Bowls BC Membership Committee	Can View all Clubs Member Data. Can Update membership status during annual reset of Members Data As requested by Clubs, can Delete Specific Member Data Can Purge old non-member data from Database Can View Club Directors in All Region Can View All Regional Directors
Bowls BC Directors	Can View all Clubs Member Data for statistical purposes or to contact certain groups (e.g. Coaches) Can View Club Directors in All Region Can View All Regional Directors

LOGGING ON

The first screen to appear is the **Log On**. Enter your supplied User ID and Password.

Which then brings up the following screen.



Clicking on **Contacts** will take you to the **Contacts** screen from where you can:

1. see the names of the current members that have signed up with your club,
2. change member data, and
3. add new members.

The term 'Contact' refers to any Member registered at your club, whether they are a full-time bowler, volunteer, social member or other.

The next Section will focus on the MANDATORY information required by Bowls BC.

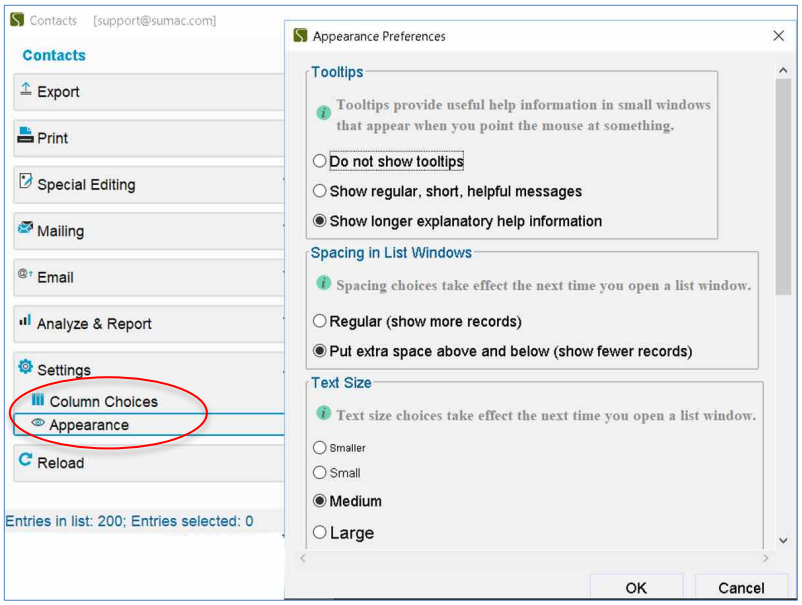
Settings

Under **Settings:**

Column Choices – columns can be reordered, added or subtracted

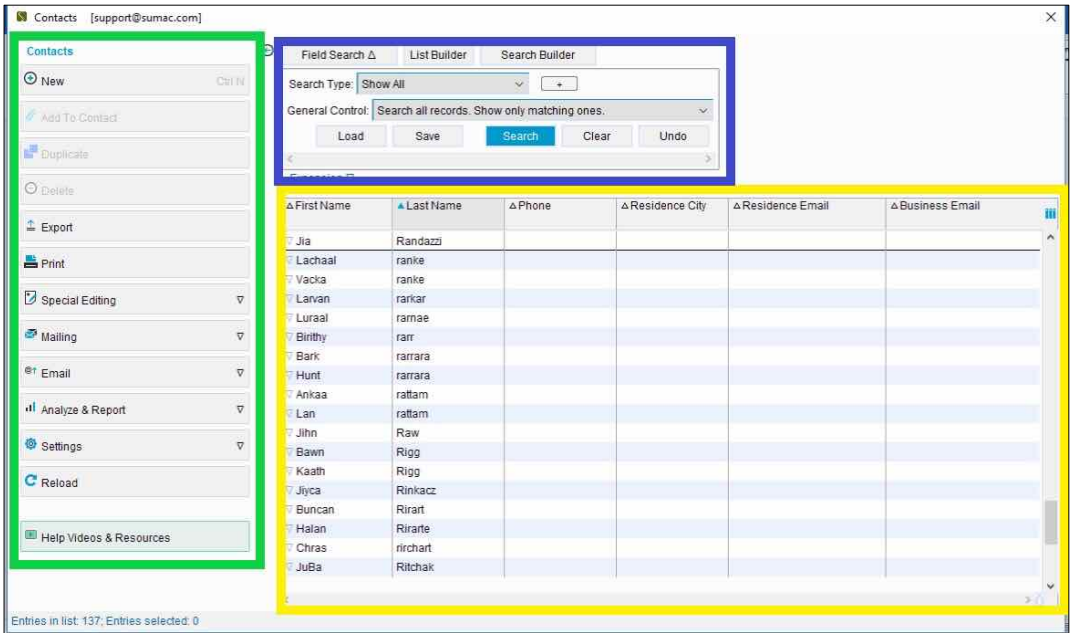
Appearances –

1. **Tooltips** and the associated message length can be controlled.
2. **List spacing**
3. **Text Size** can be modified



Contacts

This screen is the starting point for adding, changing, reporting and reviewing all your club's member data. The screen is divided into 3 areas. The **menu section** on the left (green area) controls what you want to do, the **search criteria** section at the top right (blue area) and the **search results section** (yellow area) below that.



Finding a Person

The membership data for your club contains all the members from last year plus any past members who did not rejoin last year.

To locate a person, you may wish to do so using a first name, last name or any other attribute such as email address or phone number. The following example will illustrate this procedure.

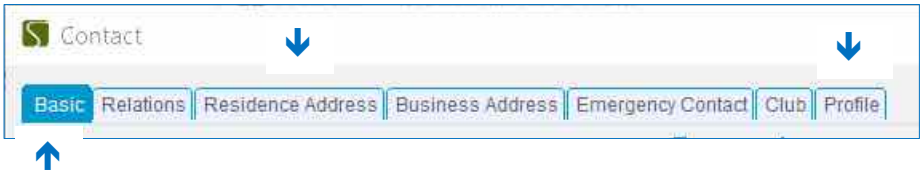
Locate a person by Last Name.

In the search results area (yellow) click the column heading '**Last name'**. It will be highlighted in grey. This will sort the search results by last name. Keep the cursor in the 'Last Name' box and start to enter the last name of the person you wish to find. It will start to show names containing the letters. If the person is in the data base, their name will be presented at the top of the list when you have completed the spelling. If the person is not found, the search screen view will not change.

The procedure is the same for **First Name** searches.

To update the existing **MANDATORY** information for **existing** members, left double click on the member's name.

You will be using three screens: **Basic, Residence Address, Profile.**



MANDATORY Information

The following information is required for the Bowls BC Membership System.
Mandatory fields will be identified by a * after the name.

BASIC Screen:

First & Last Name* – *last year's members will be preloaded*

Gender* – *Female, Male, Other*

Membership Category* – known as **Contact Type**

Communication Preferences* – *Mandatory for Club Executives only* – optional for members wanting newsletters from Bowls BC.

Home Club* for a member who belongs to a second club

RESIDENCE Screen:

Email Address* – required for club executives only

PROFILE Screen:

Year Started Bowling*

Athlete Level *– denotes whether the member plays/competes at the club, district, provincial, national or international player in the last 3 years

Certified Coach Level* (if applicable)

Criminal Record Check Year* (if applicable

Certified Umpire Level* (if applicable)

Age Range*

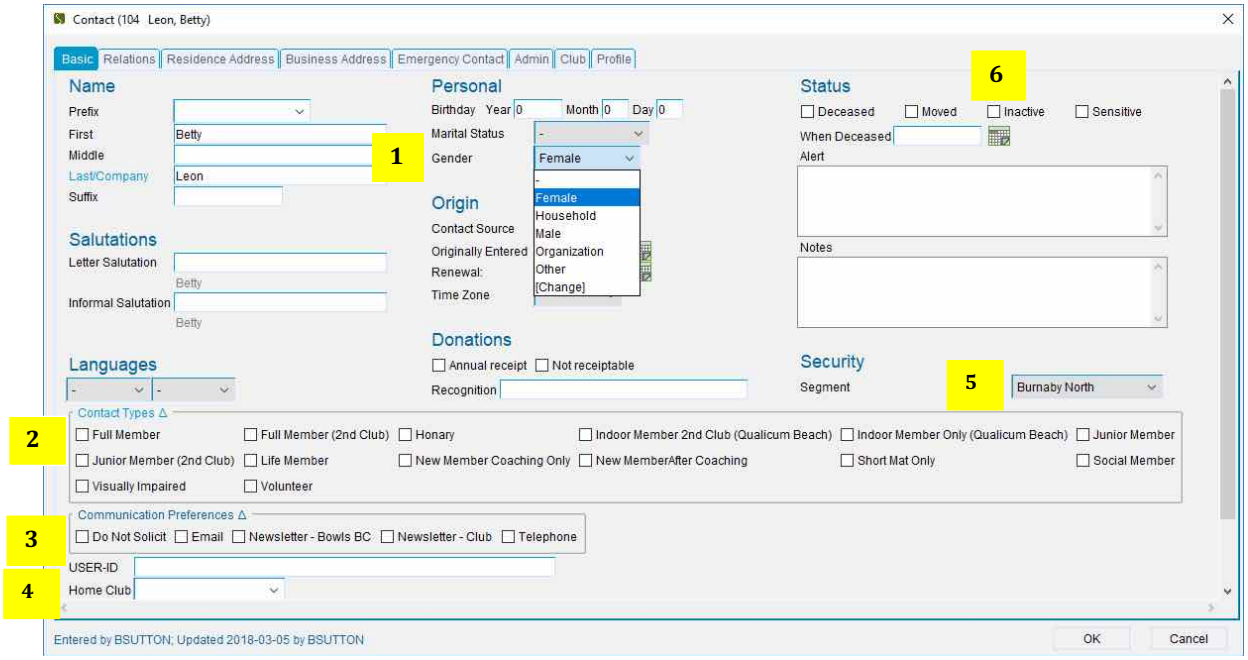
Suggested Club Membership Application Form Revisions

Since some of this data may not yet be captured on the club's membership application form. Bowls BC recommendations that, if the following categories are not already on your current membership application, they be added.

1. Year Started Bowling
2. Gender
3. Age Range
4. Athlete Level
5. Qualifications: i.e. Coach level, Umpire level, criminal record check.
6. Communications agreement – statement agreeing that the club and/or Bowls BC has the member's permission to store and use the provided email address for communication purposes and a line for a signature.

A Word .doc membership form is available for download from the Bowls BC website. This form can be modified in Word to suit a club's requirements. A sample is contained as an attachment to this manual.

MANDATORY INFORMATION: Basic Screen



The **First and Last name are carried forward** from the previous screen.

Mandatory fields on the basic screen are;

1) **Gender –** options are: Female, Male, Other – *Household & Organization not used*.
2) **Contact Type** (i.e. Membership Type) – Choose applicable category: **Full Member**, or **Full member (2nd club**) or any other including **Social Member** if applicable
3) **Communication Preferences – Mandatory for Club Executive only –** optional for members wanting newsletters from Bowls BC
   NOTE: To conform with **provincial privacy laws**, Communication Preferences must be supported by a **signature on the Members' application / Membership Renewal form**.
4) **For Full Member (2nd club) select the Home Club from the drop-down menu** (that is the member has paid affiliation fees at another club).
5) The field '**Segment**' (the System identifies your Club as a Segment) has been pre-filled by the system with your club name; *(e.g. 'Burnaby North')*.
6) *Optional:* ***Inactive Member*** – Once a member has been assigned a Contact Type and saved, the member is now considered an Active Club Member.

   Recommendation: **Delete** non-returnees who are deceased or whom you know will never return. If members, at some time in the future, may return to active status, check them as **Inactive**. This preserves the personal and contact data so if they rejoin at a later date the data is already there.

All other fields on this screen are optional.

If your club decides to use this Sumac program as its primary membership system, an email function allows you to contact members with individual emails. Contact Brian Sutton if you would like this option activated.

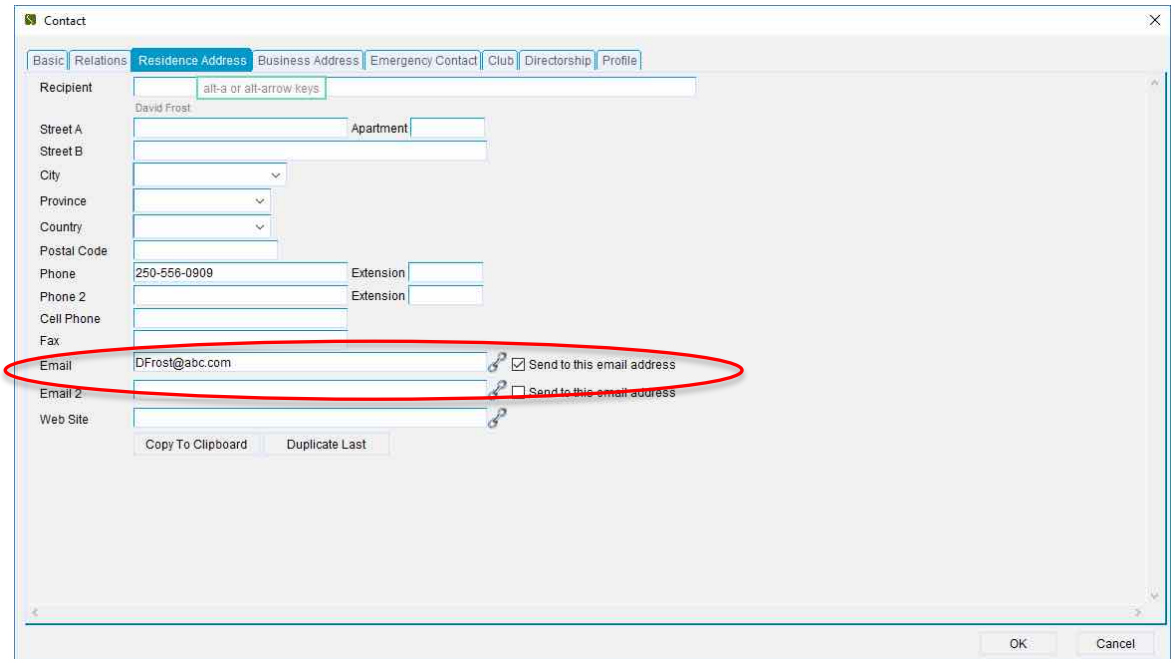
Social Members

Social Members are members that have limited membership benefits, not being able to bowl. This information is collected to help measure the community engagement and use of your facility.

Clubs may enter Social Members data into the database. **Clubs that do not enter Social Membership data into the Membership System will be required to report the total number of Social Members to Bowls BC separately**.

Go to **Residence Address Screen** on next page.

MANDATORY INFORMATION: Residence Address Screen

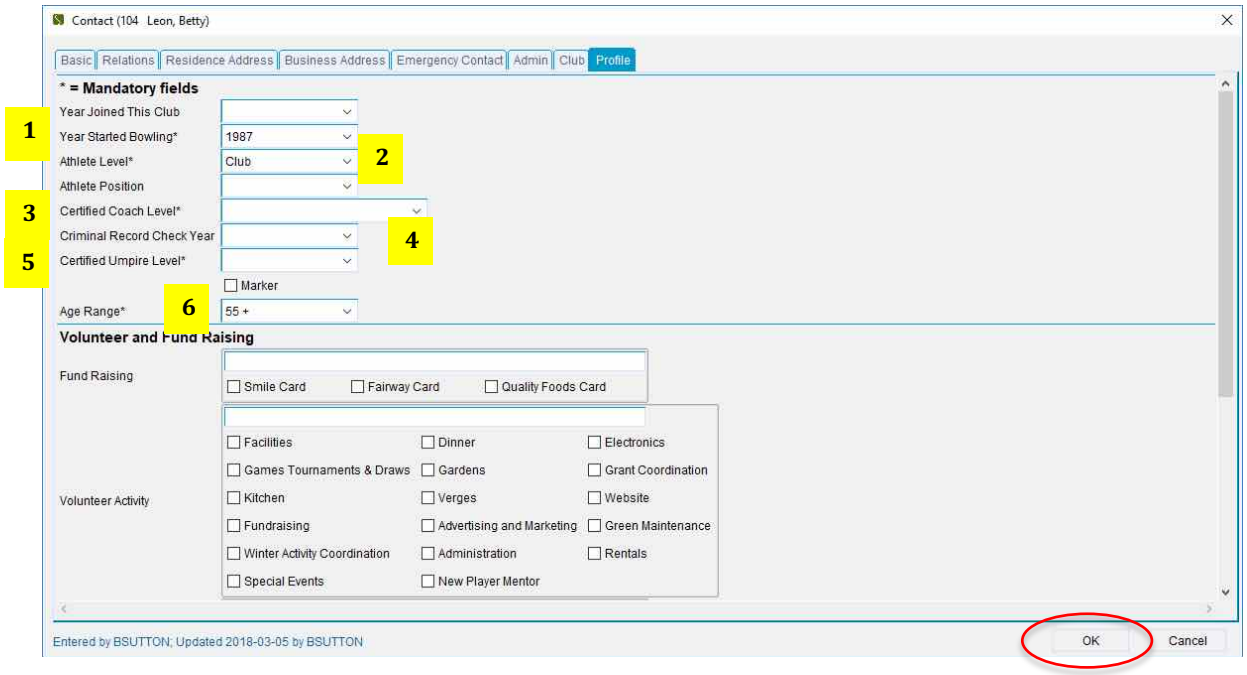


Email Address – mandatory for Club Executives only. Click 'Send to this email address' box.

Optional - if the member wants to receive communications from Bowls BC.

Go to **Profile**, the last screen – see next page.

MANDATORY INFORMATION - Profile Screen



The following fields are mandatory *(denoted by an *):*

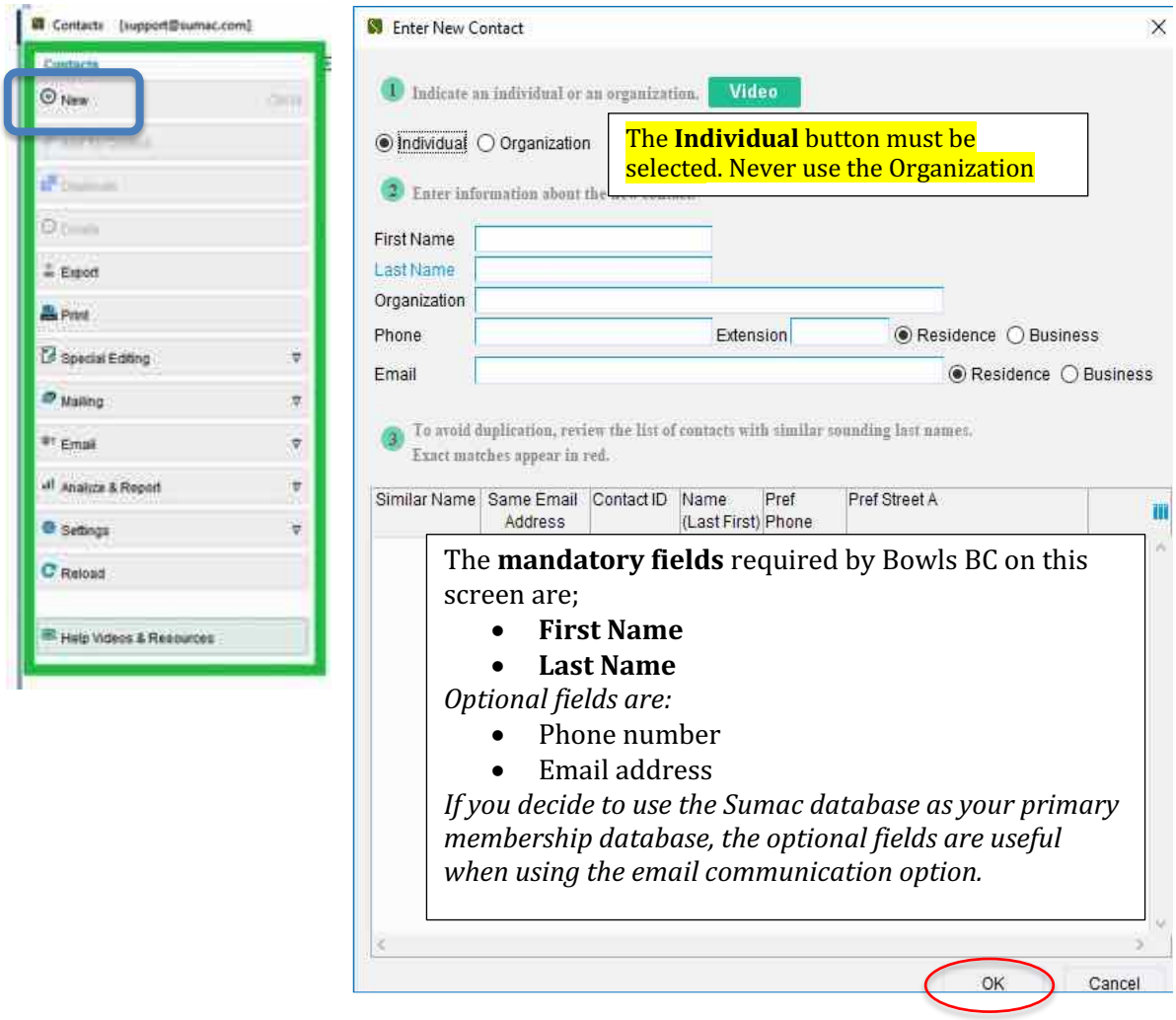
1. **Year Started Bowling –** *this is important info for Bowls BC purposes.*
2. **Athlete Level –** *this is the highest level at which a player has competed during the last 3 years.*
3. **Certified Coach Level** - *can be blank if not applicable.*
4. **Criminal Record Check Year** - *(If a Coach and has been done, otherwise blank)*
5. **Certified Umpire Level** - *can be blank if not applicable.*
6. **Age Range –** *broad age categories*

All other fields on this screen are optional.

Click **OK** when you have finished entering the **mandatory** information to save it.

MANDATORY INFORMATION - *Adding a New Member*

To add a new member, click '**New**' (top left of screen in the **green area**. The following screen is presented



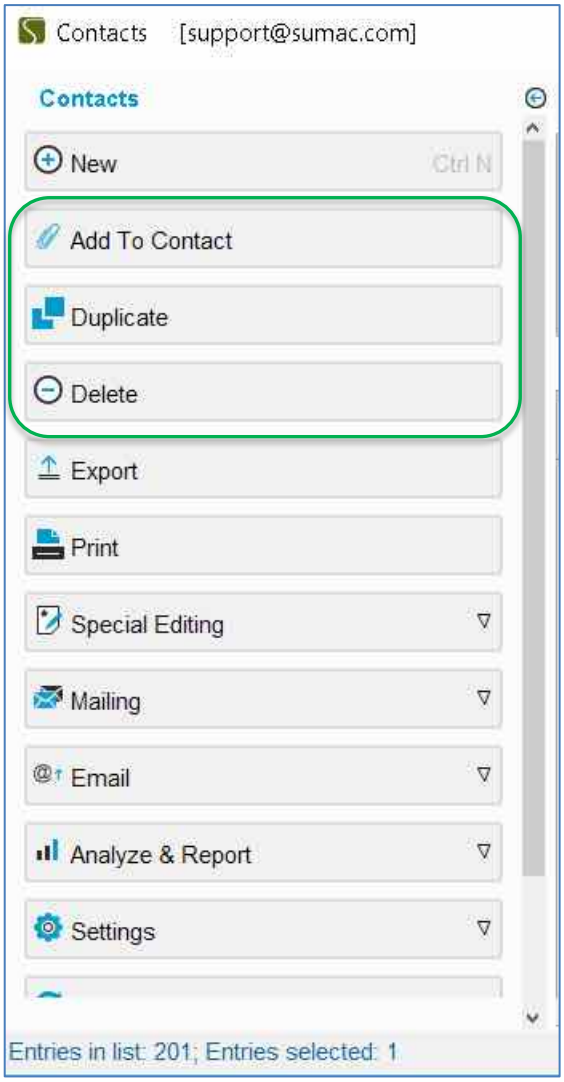
Click **OK** when you have finished entering the **mandatory** information to save it.

Complete the **Mandatory** information sections on the following three screens:

Basic - *instructions on page 13*
Residence Address – *instructions on page 15*
Profile - *instructions on page 16*

Other Functions When Adding Contacts

When adding a new contact, other options become available.



Add to Contact - brings up an optional window. *Not used or required*.

Duplicate – this is useful for entering information of coupled members.

Delete – useful for deleting exiting members who are not ever returning (Use the Inactive category if not sure)

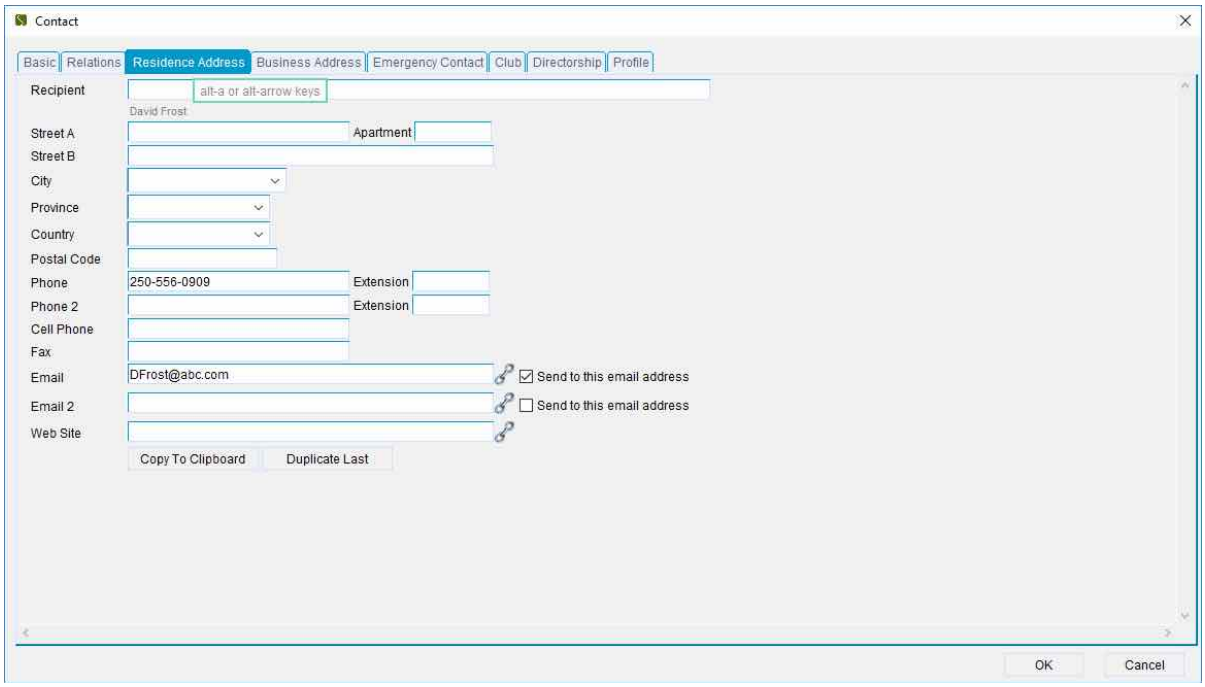
The remaining categories are explained later in this document.

OPTIONAL INFORMATION

Since Sumac is a powerful database, clubs can decide to use it as their primary membership database. With the optional functions a club can:

1. Store residence addresses, phone number(s) and email addresses
2. Record Volunteer information
3. Emergency contacts
4. Club info: locker numbers, track club key holders – other options can be tailored to your requirements via the Bowls BC Membership Committee.

OPTIONAL INFORMATION - *Residence Address Screen*



Recipient Information is automatically filled in by the system from previous inputs.

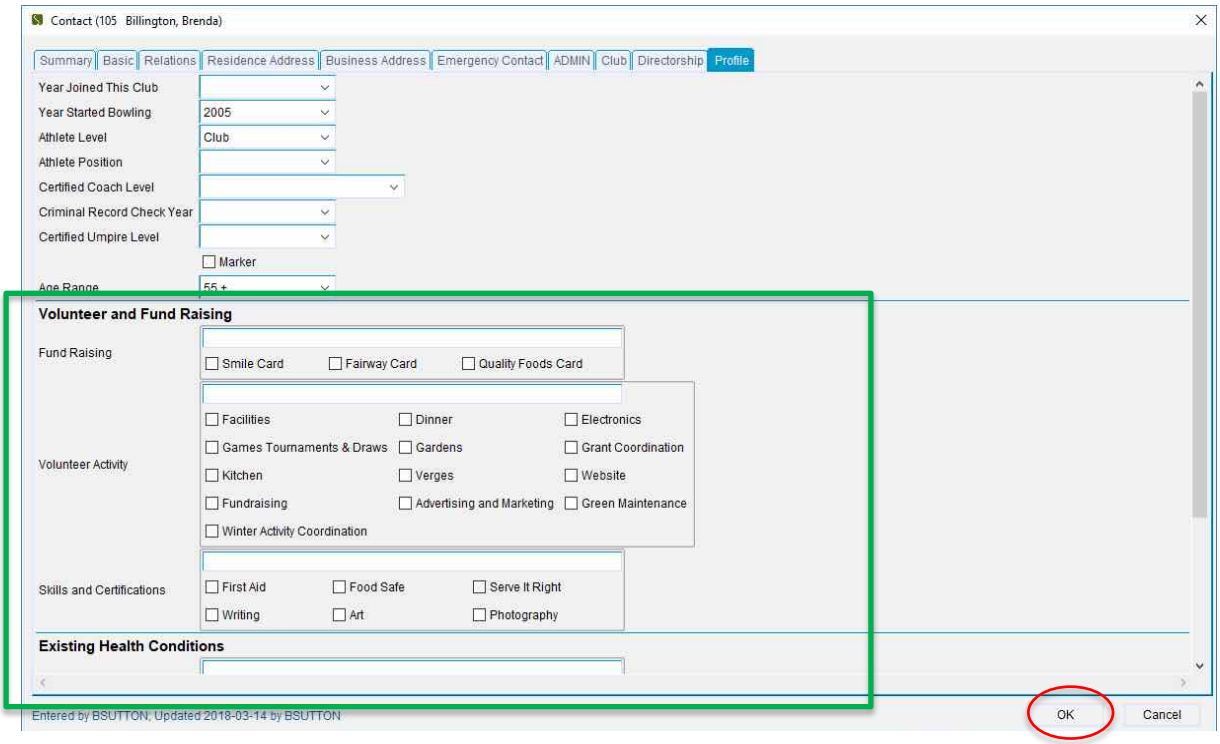
On this screen you can add the member's address, phone number, etc., as required.

Go to **Profile**, the last screen

OPTIONAL INFORMATION - *Profile Screen: Volunteers*

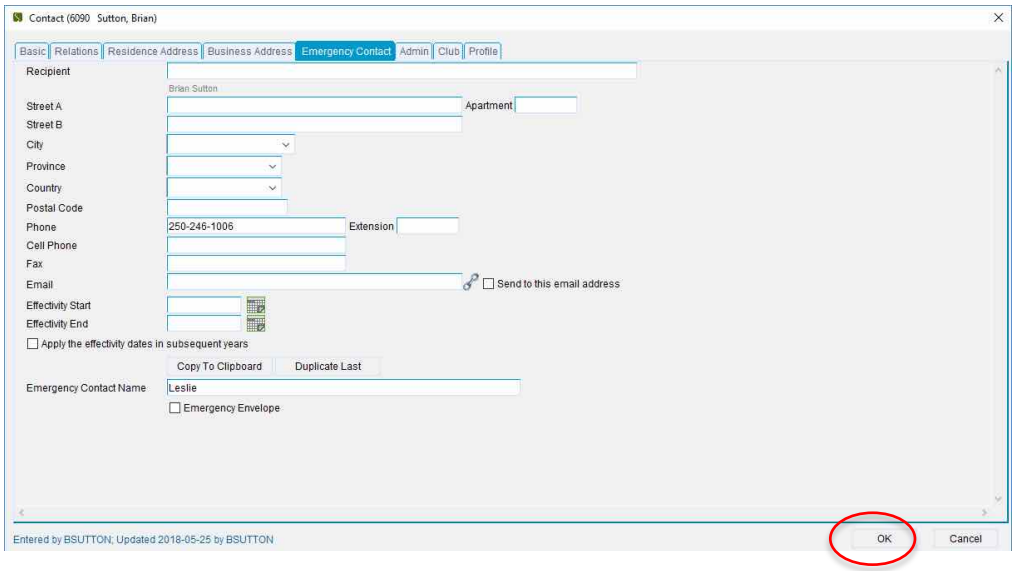
Identifying Club Members who are volunteers is optional. When used in conjunction with Volunteer activities and skills (on the **Profile** screen) clubs will be able to perform searches, create reports and send emails to volunteers based on these criteria.

For example, when planning a Canada Day event, a Club may need to know who has volunteered for kitchen work. A report of all members who have volunteered for the kitchen could be executed as well as an email sent to each one regarding the event.



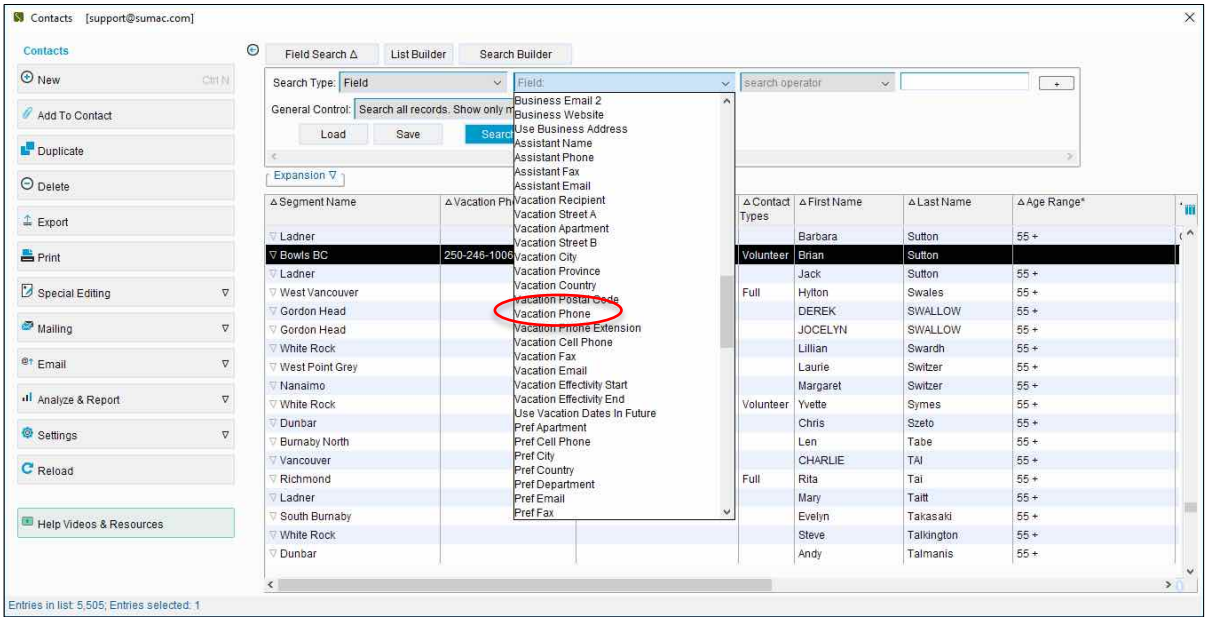
Click **OK** when you have finished entering the **optional** information to save it.

OPTIONAL INFORMATION - *Emergency Contact*

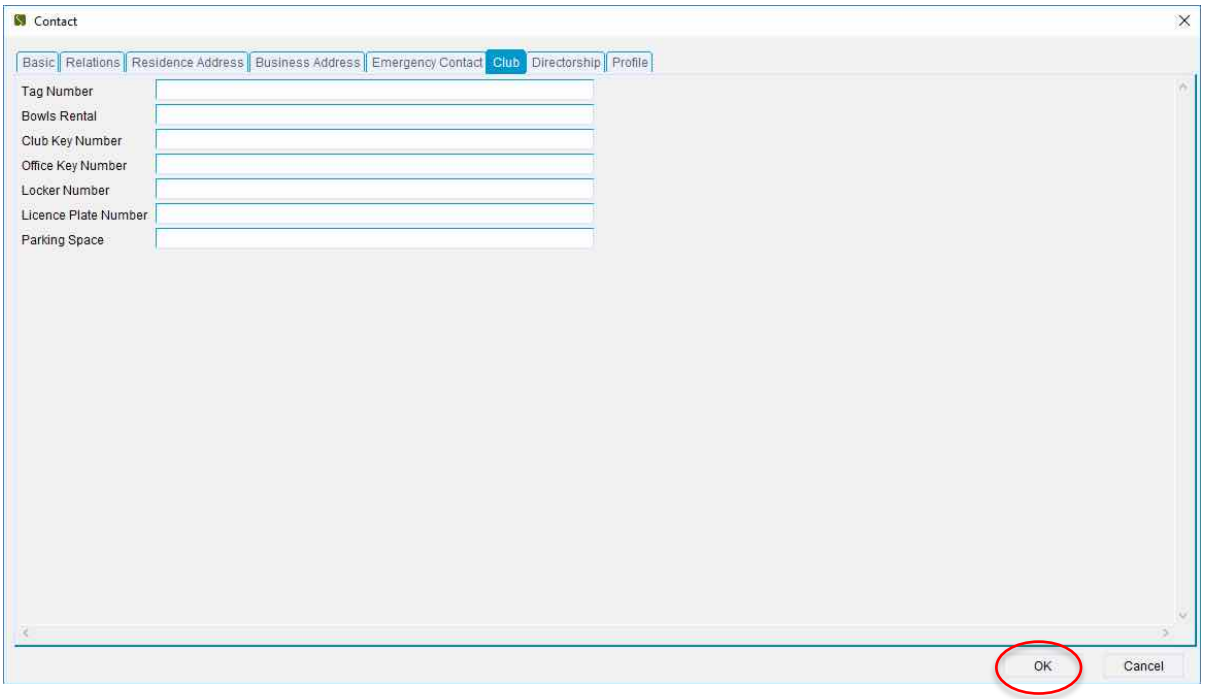


Click **OK** when you have finished entering the **optional** information to save it.

NOTE: There is a bug current in Sumac. Searching for an Emergency Contact phone number from the main Contact Screen there is no '*Emergency phone'* option. To retrieve an emergency phone number in the second field box, you must select the '**Vacation Phone**' option. Hopefully at some point this bug will be fixed.



OPTIONAL INFORMATION - Club Screen



This data is for Club use only and is optional. There are no rules as to what may be entered.

If there is another field that your club would find useful, please contact the Membership Committee to have it setup.

Clubs will be able to create reports based on this data.

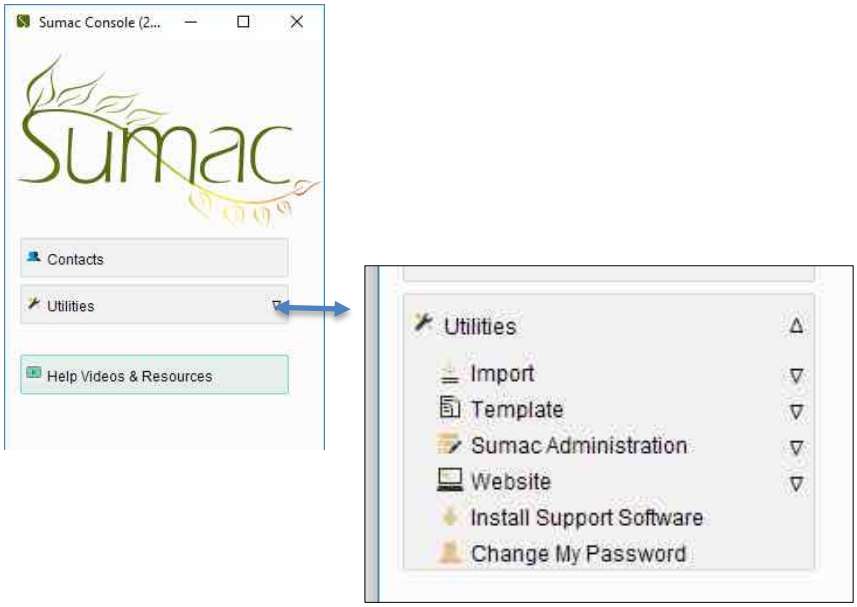
Click **OK** when you have finished entering the **optional** information to save it.

Miscellaneous Screens

Relations Screen: *not currently used*

Business Address: *not currently used, however if a club wishes to use these fields they may.*

Utilities



Most of these items will only be used as requested and supervised by the Membership Committee

OTHER OPTIONS

Export - See page 25

Print – See page 33

Special Editing – *Not implemented*

Mailing – *Limited use if clubs don't use surface mail*

Email – *Contact Brian Sutton for activation*

Analyze & Report – *Limited use*

Settings – See page 10

Help Videos & Resources

Selecting Help Videos & Resources will take you to the Sumac website where you will find useful video tutorials about using many features of the software, such as sending emails and reporting. These are general helps and are not specifically tailored to the Bowls BC specific screens.

It is strongly advised that you review the help videos, especially those describing:

- Search & Queries
- Send Email
- Reporting

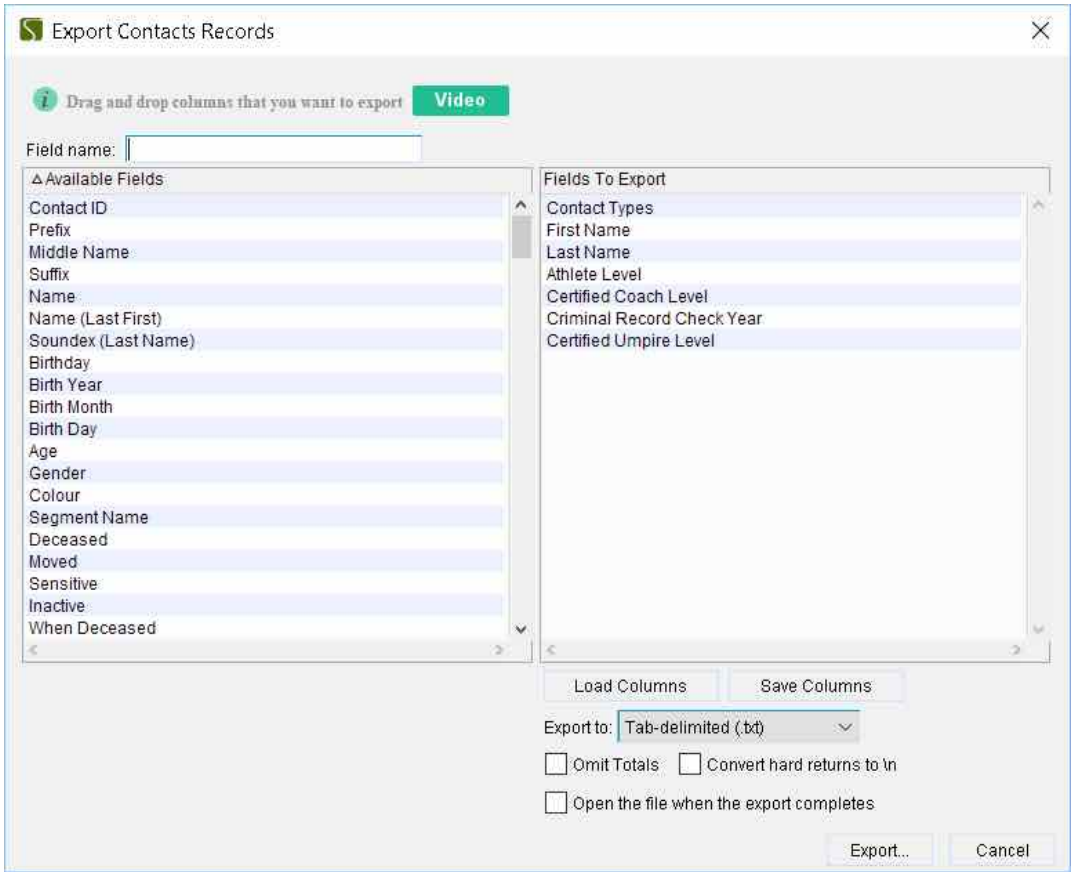
REPORTS & LISTS

Reports and lists of many kinds can be built and exported from Sumac.

Export Membership Reports

Reports can be generated from the existing member records. Lists of member names including phone number, emails, etc., can be compiled and exported in **.txt** or **.csv** formats. A "**Print to PDF**" option is available for saving files via this format is covered in the section on **PRINTING**.

Available fields can be dragged into the right **Fields to Export** box and moved out as required.



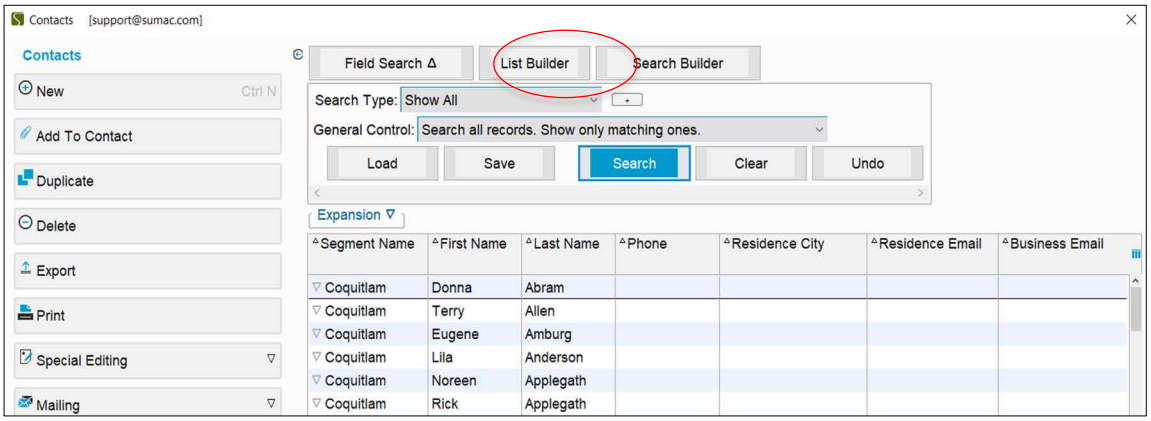
Click on **Export** to complete.

REPORTS & LISTS

Contacts List Builder

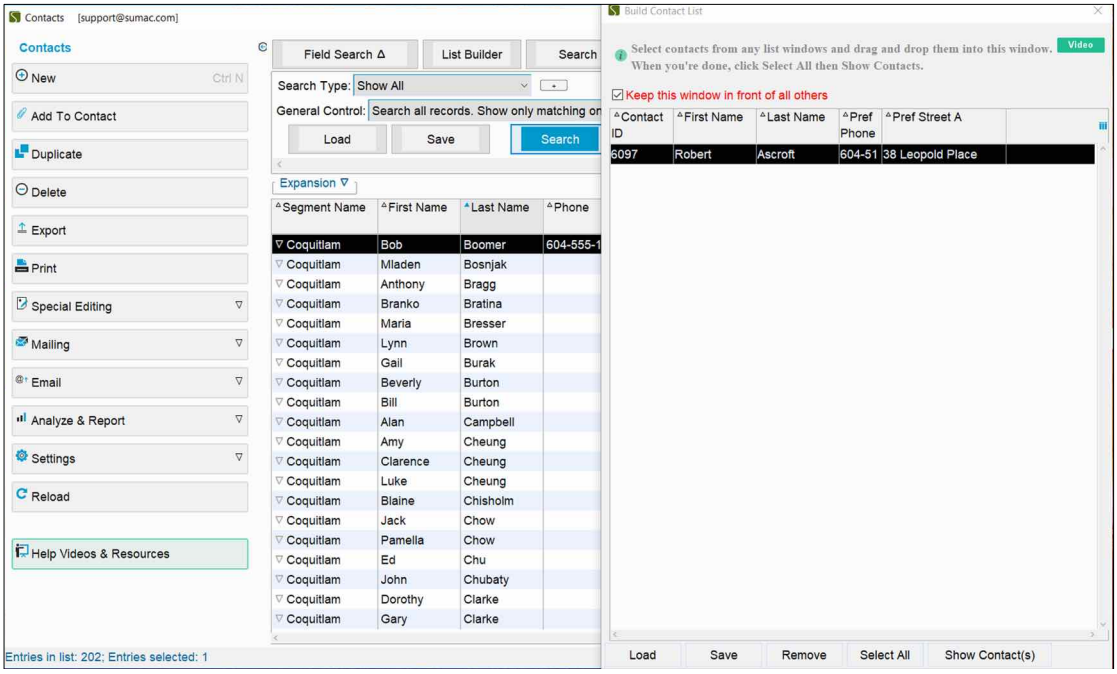
List Builder allows the creation and saving of specialized contacts lists; for example, committee members, kitchen volunteers, coaches, etc. These lists can be saved to be used again.

Click on the **List Builder** tab.



This brings up a **Build Contact List** window.

1. Check the box beside '**Keep this window in front of all others**'.
2. Use the First or Last Name search function to find members for the list you want,
3. Click on the name and drag it into the Build Contact List window.

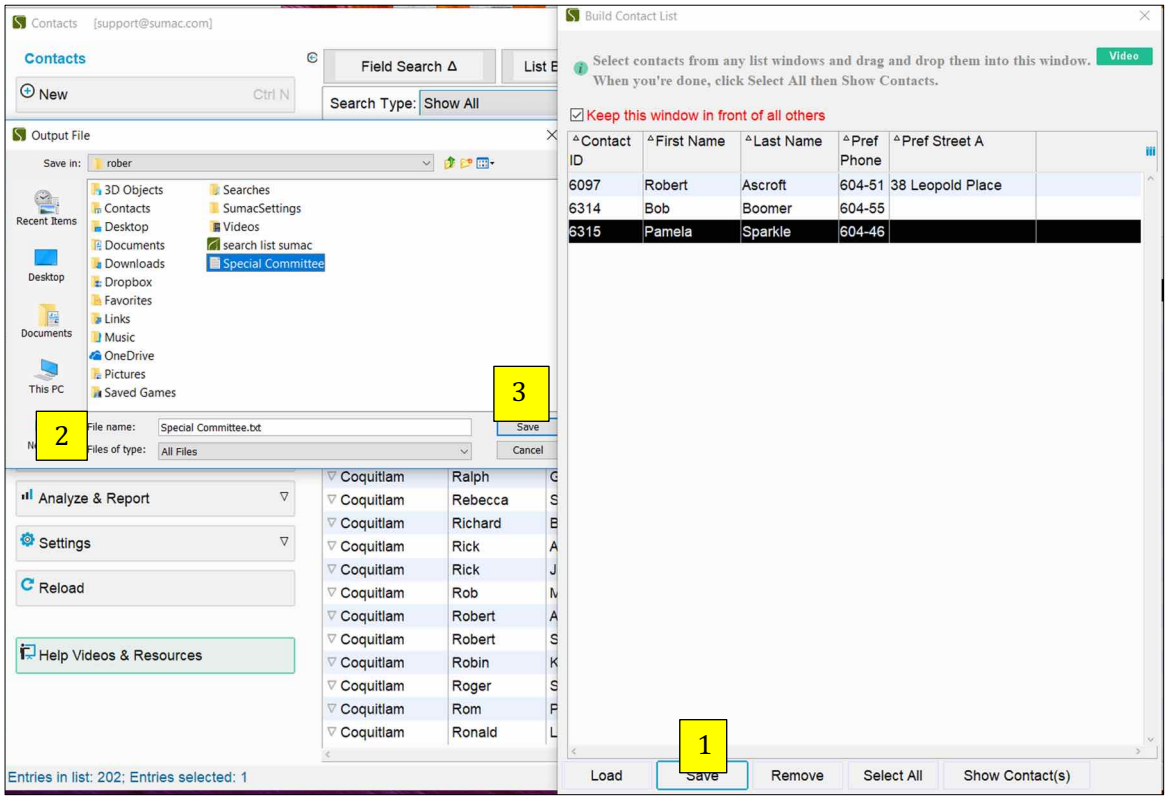


REPORTS & LISTS

Contacts List Builder

When the list is finished;

1. Click on **Save** which brings up an Output File window,
2. Type in a distinctive file name,
3. Click on **Save**.

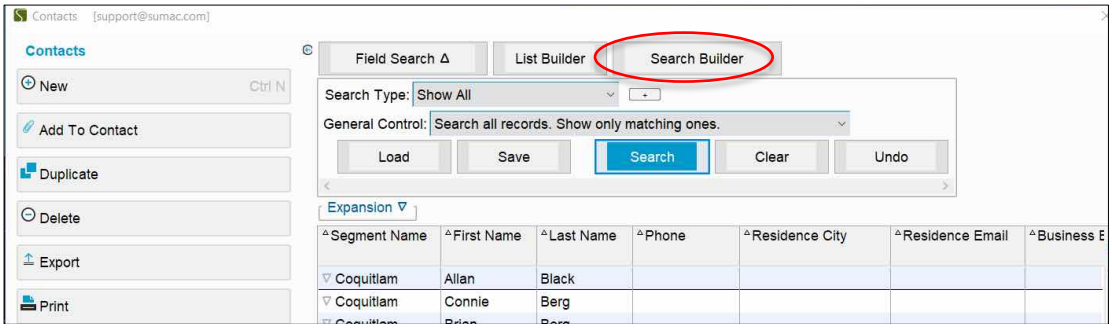


REPORTS & LISTS

Search Builder

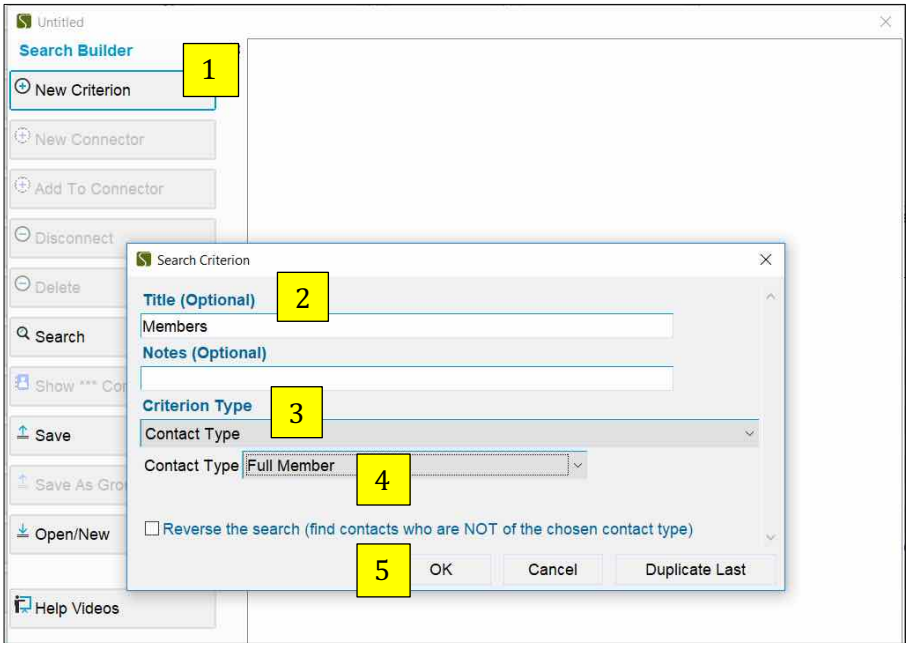
Sumac has a function that allows the creation of searches using specific criteria. These searches can be saved for future use. The search seems to work best with at least three criteria. For the example, we will search for full members who volunteer to handle facilities and who live in Coquitlam.

Click on the **Search Builder** tab.



The **Search Builder** window appears.

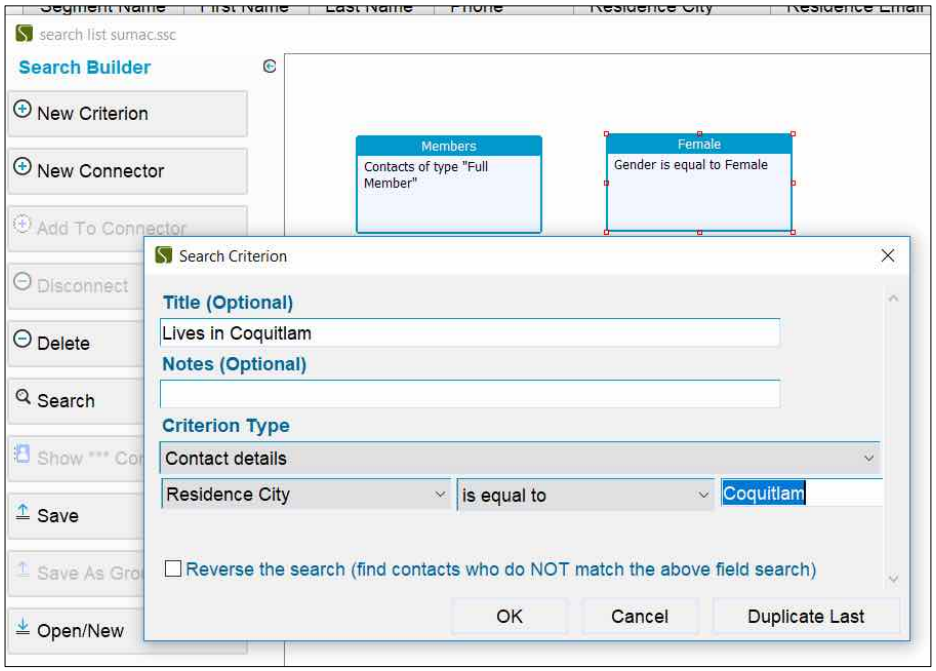
1. Click on **New Criterion**,
2. In the **Search Criterion** window; give the criterion a tile,
3. In the **Criterion Type** box select **Contact Type**,
4. In the contact type sub-box, select **Full Member**.
5. Click **OK**



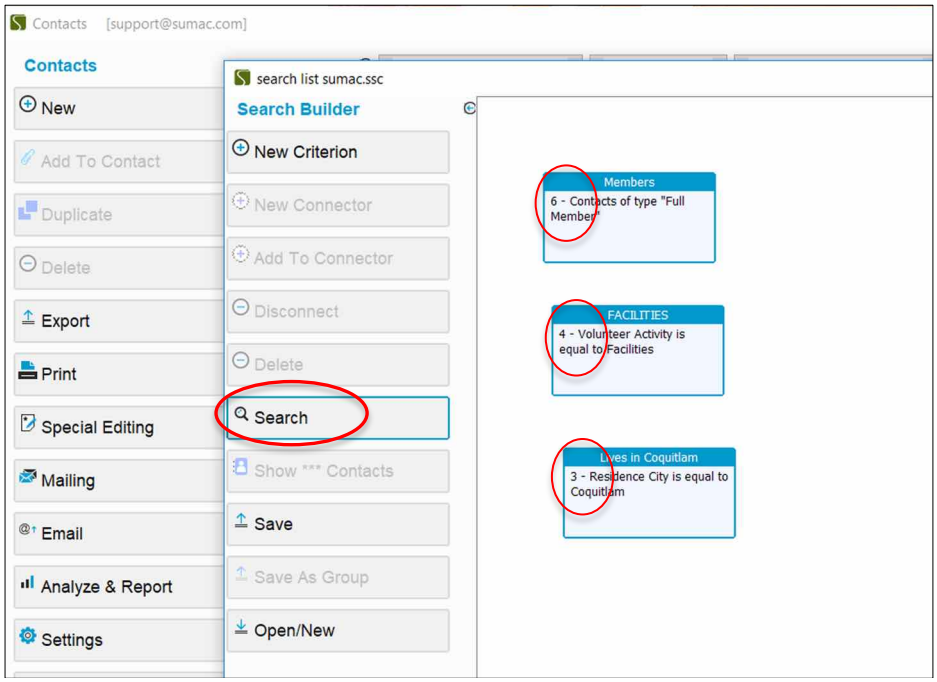
REPORTS & LISTS

Search Builder

For determining the city, the **Search Criterion** window, under **Criterion Type**, **Contact Details** provides a 'less than/equal to' function to input the required city.



Clicking on **Search** will produce the number of criteria matches.

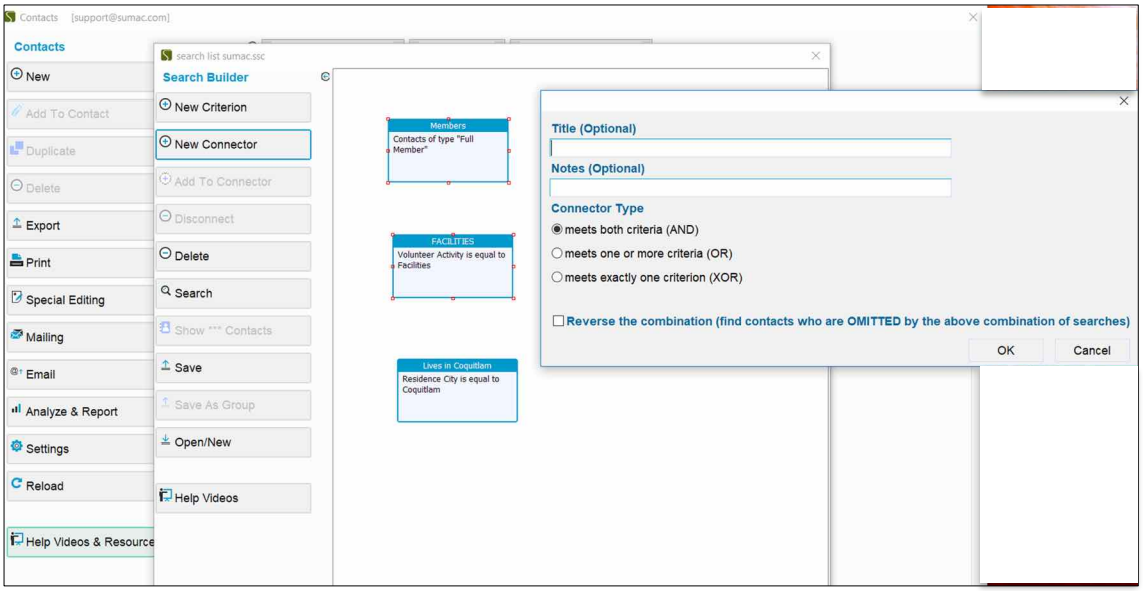


REPORTS & LISTS

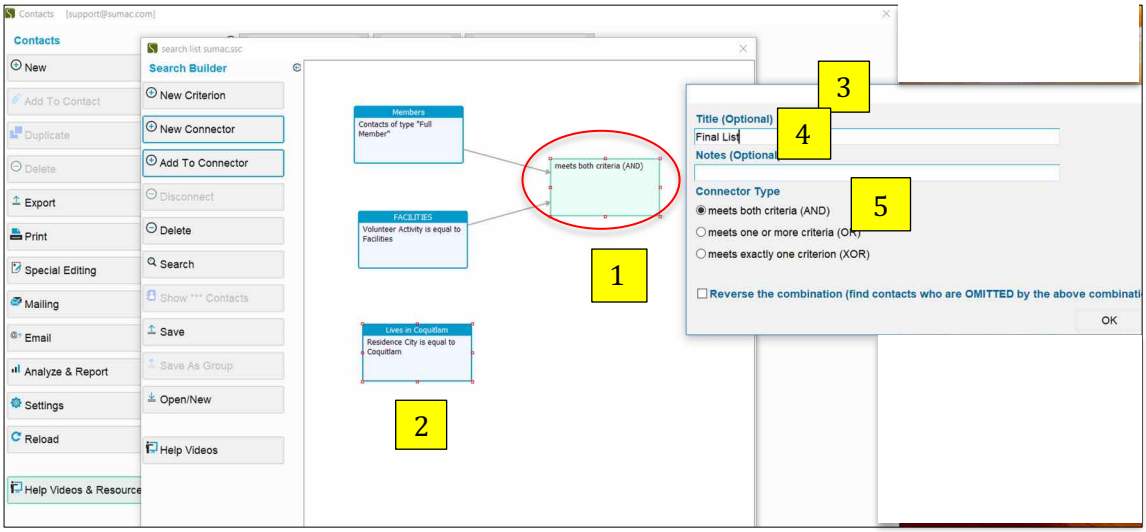
Search Builder

Highlight two boxes by holding down the shift key and left clicking each box. Click on **New Connector** which brings up another window.

Enter a title (optional) and select the **Connector Type** – in this example the AND function. Click **OK**.



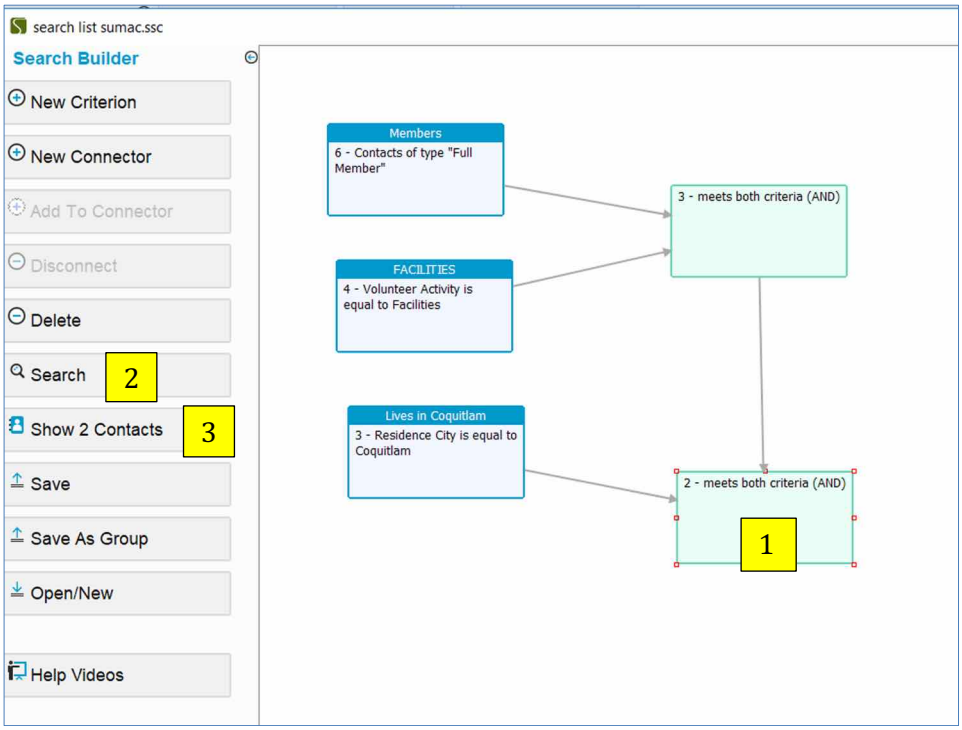
A connector box *(circled)* generated



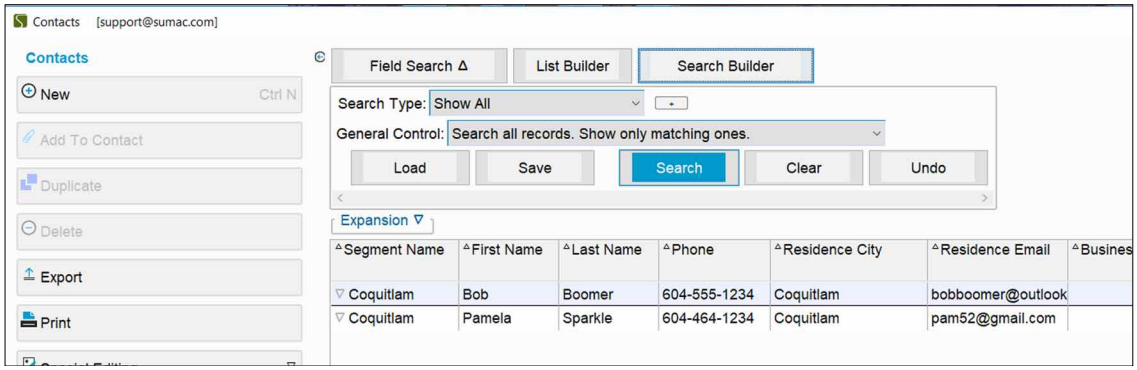
Hold the shift key down and **select the new box just generated** [1] and then the '**Lives in Coquitlam' box** [2]. Left click on **New Connector** which shows another window [3]. Add a title [4] and select Connector Type [5]. Click **OK** to generate the final box.

REPORTS & LISTS

Search Builder

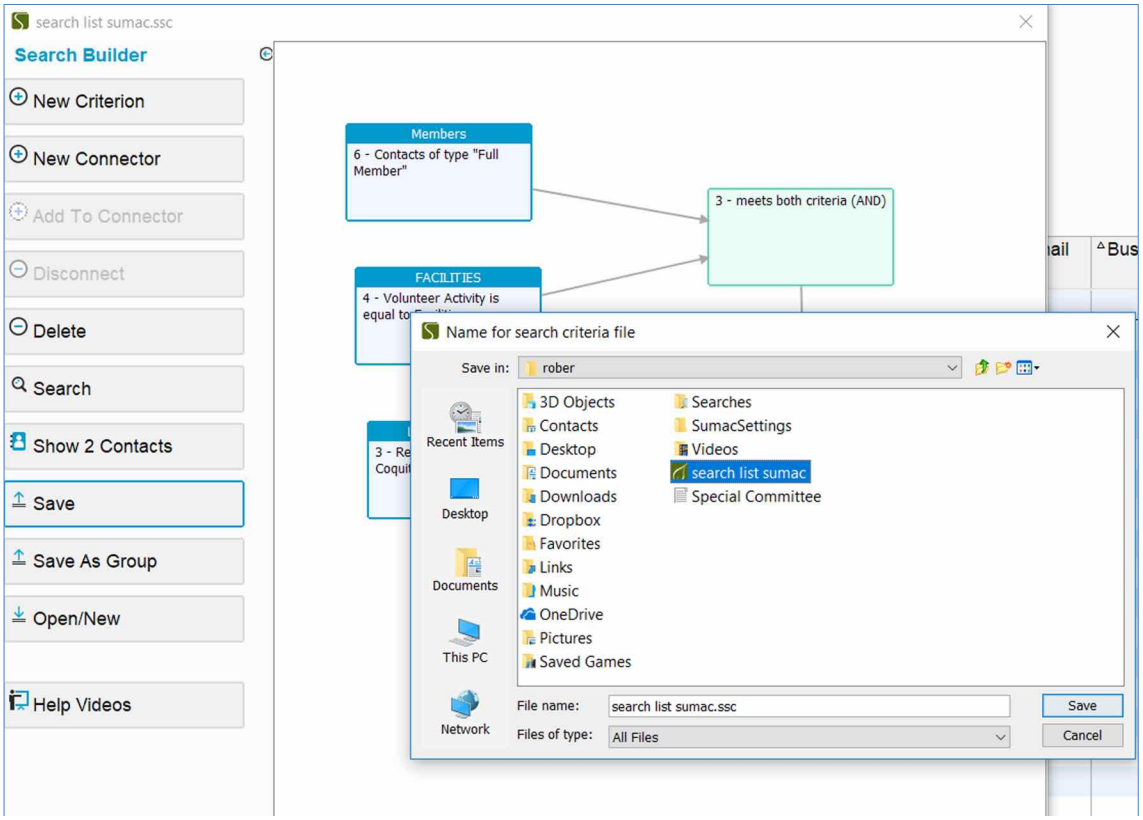


1. Highlight the new box [1] and click on **Search** [2]. The number of instances that match the criteria will be shown.
2. The **Show Contacts** box [3] will become active.
3. Clicking on the box produces the window below.
4. The report can then be:
   a. Exported as a .csv or .txt file;
   b. Printed using the Print function; or
   c. Saved as a PDF file using Print to PDF.



Search Builder

The search can be saved for future use. Clicking on Save will bring up a Yes/No box. Click on Yes.



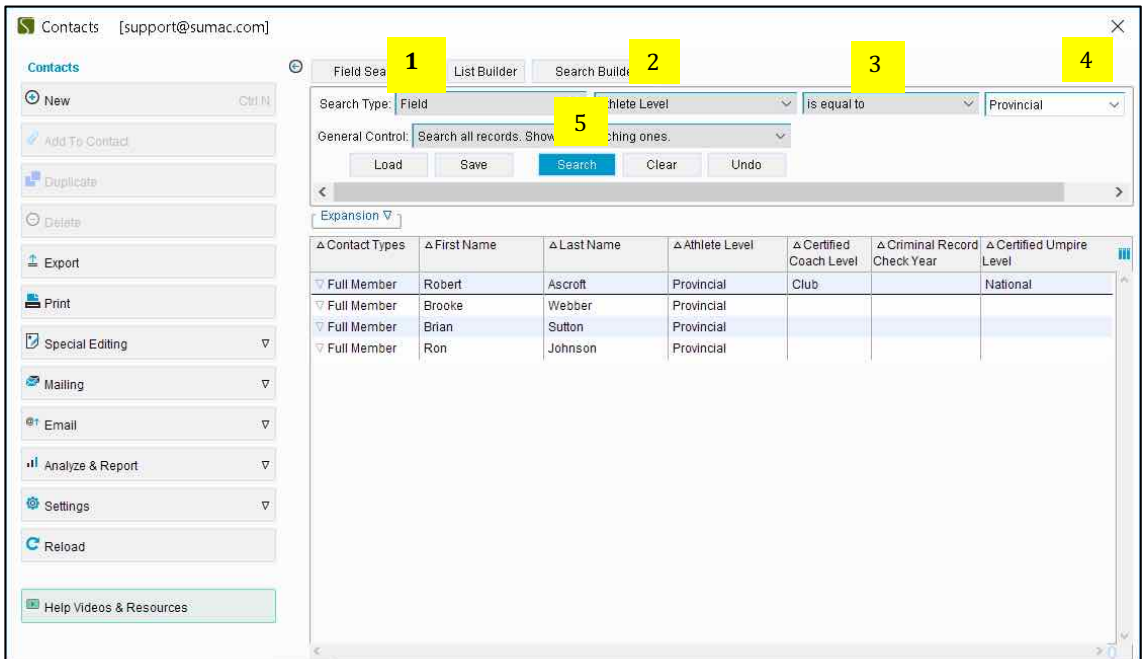
Enter the file name and save to your document storage location. Click **Save**.

PRINTING

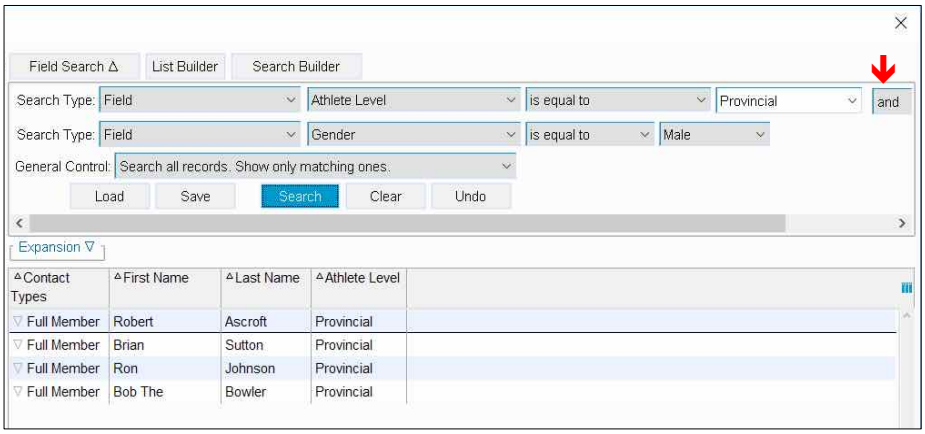
Printing is done from the main **Contacts** screen.

Lists can be printed using the available fields. For this example, we want a list of all members who play provincially. Select the Search Type. In this case:

1) Search Type – select "Field"
2) Select "Athlete Level"
3) Select "Is equal to"
4) Select "Provincial"
5) Click on **Search**

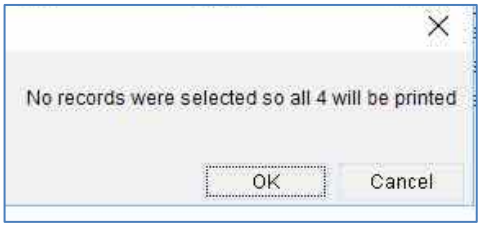


NOTE: Complex searches with multiple variables can be made as per the example below.



"+" – 'and' function adds more choices

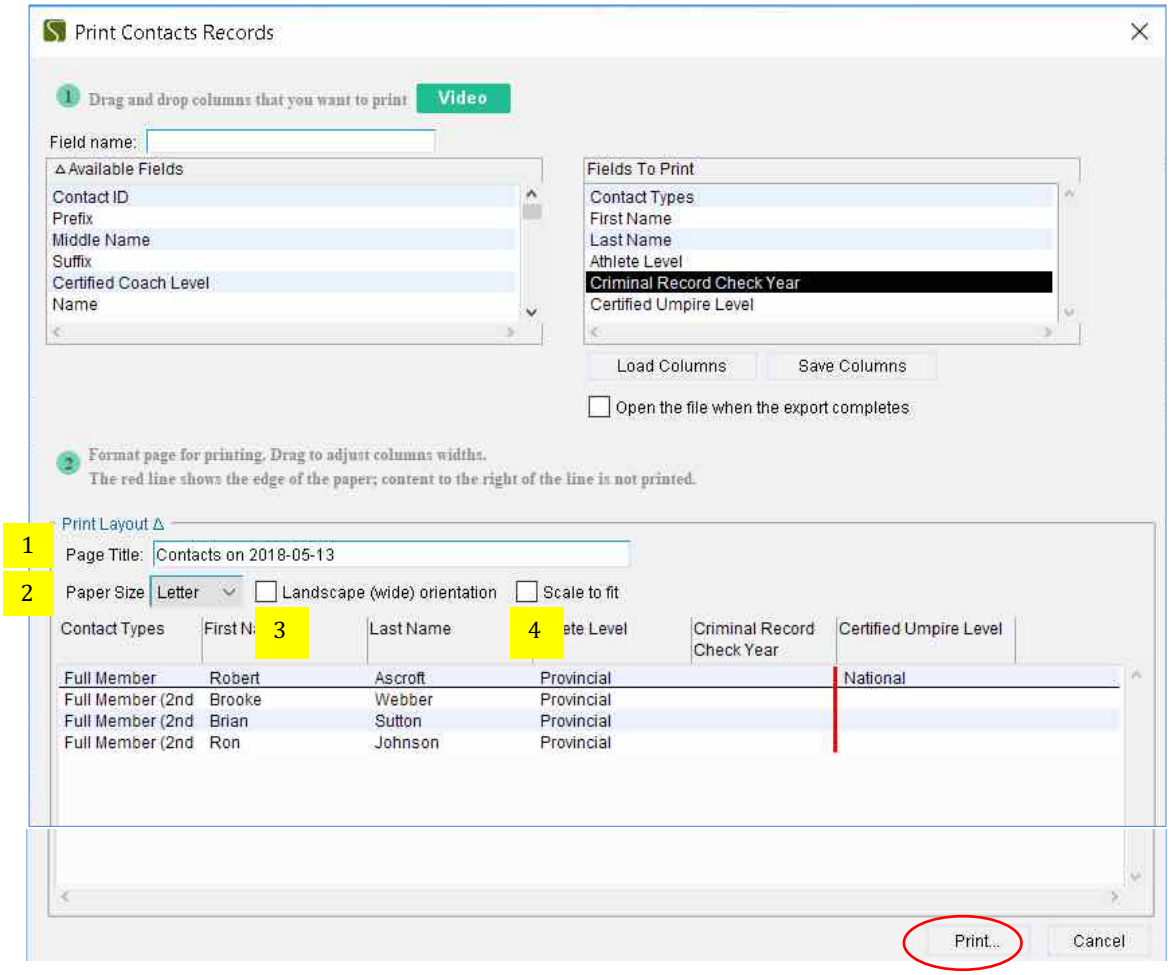
Printing



A window will pop up asking for confirmation that the list will be printed.

Click **OK**.

The **Print Contacts Records** windows appears.



The right-side panel, **Fields to Print**, has the list of fields (columns) to be printed. It contains all of the fields, some of which are not required.

To **remove fields** not required, left click your cursor on the field and drag to the left.

To **add fields**, click on a field in the left panel and drag to the right.

The **red line** shows the right-hand page margin.

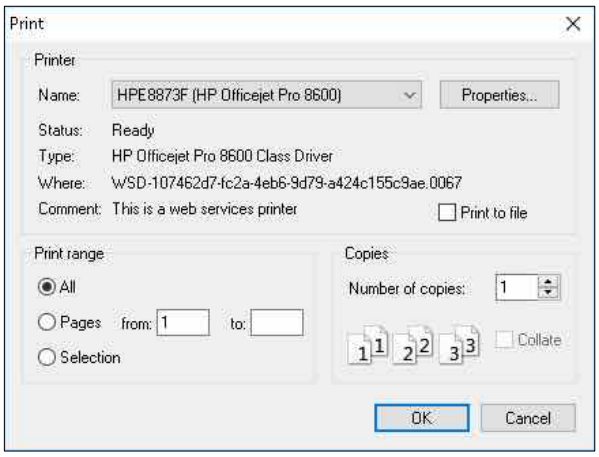
Printing

Columns can be reduced or expanded by putting the pointer on the column line until a -ll- symbol shows, which then can be dragged to the right or left. By shrinking the columns, more can fit on the page.

Further adjustments are:

1. Page Tile box. 2. Page size. 3 Landscape orientation. 4. Scale to Print

When you have the required fields, click on the **Print** button at the bottom of the window.

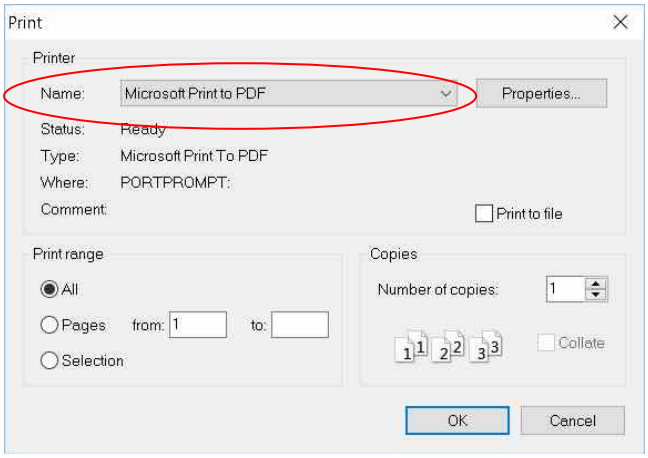


The computer print screen will appear, click on **OK** to print.

Print to PDF

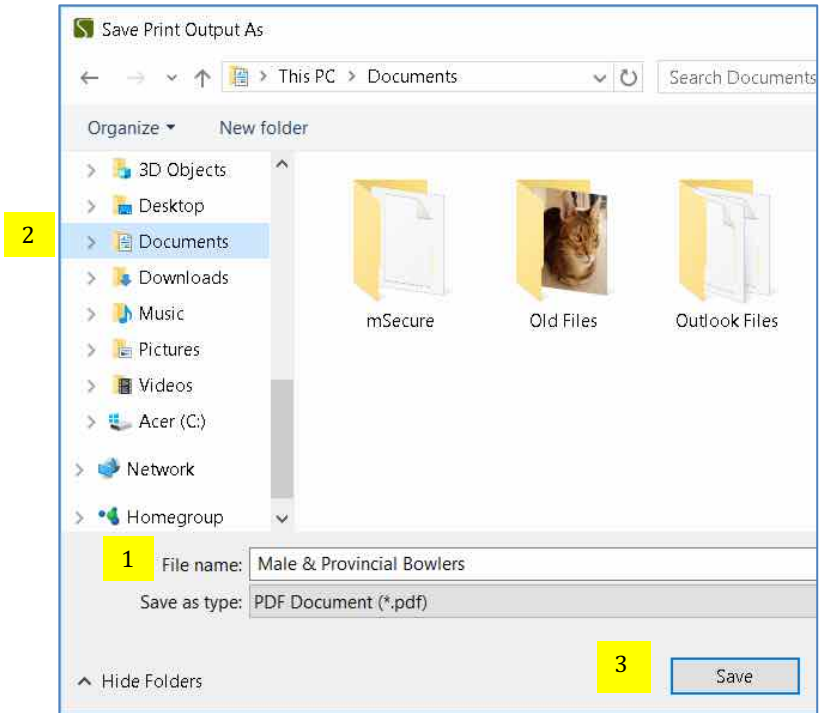
NOTE: If you would like to output the file to a PDF so you can send it as an email attachment instead of printing it.

In the 'Name' box click on the right down v and select option **Print to PDF**.



Another window will appear where you can:

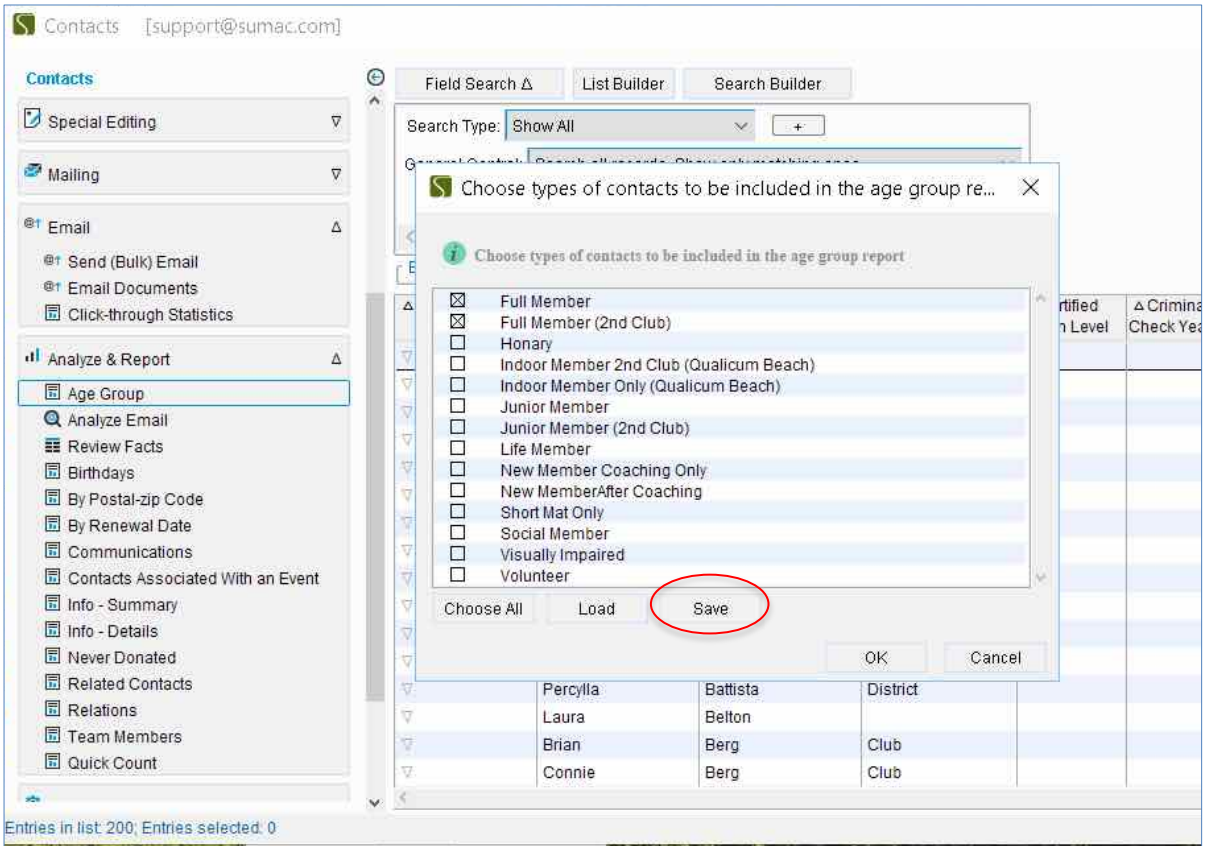
1. Name the file
2. Select where you want to place it.
3. Click **Save** when ready.



ANALYZE & REPORT

The Analyze & Report Function allows users to prepare reports based on specific fields. Reports can be saved for further reference. It is of limited use.

The example below shows the options available under **Age Group**. Click on **Save** and then OK.



DIRECTORS DATABASE

Directors data is organized by region. Your login ID, which ends with a 'D', automatically presents your regions list of Directors.

For Qualicum Beach example, the logon ID may be QUAL5 which allows for the maintenance of membership data for Qualicum Beach.

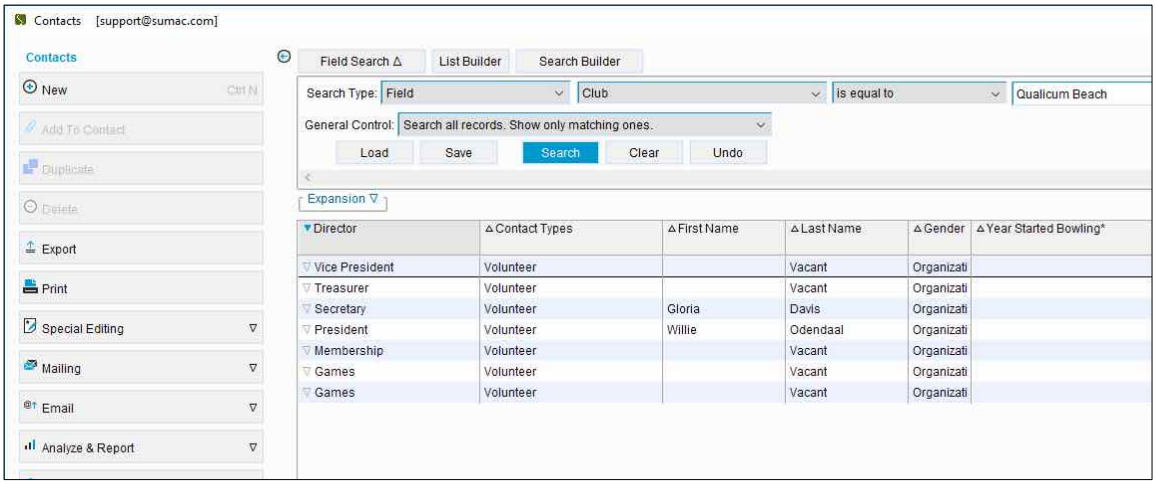
The Director logon ID example may be QUAL5D which presents data for the region that Qualicum Beach is assigned to, in this case NIPR (North Island and Powel River).

After logging in the familiar screen is presented.

Click **Contacts** and the Contact screen appears.

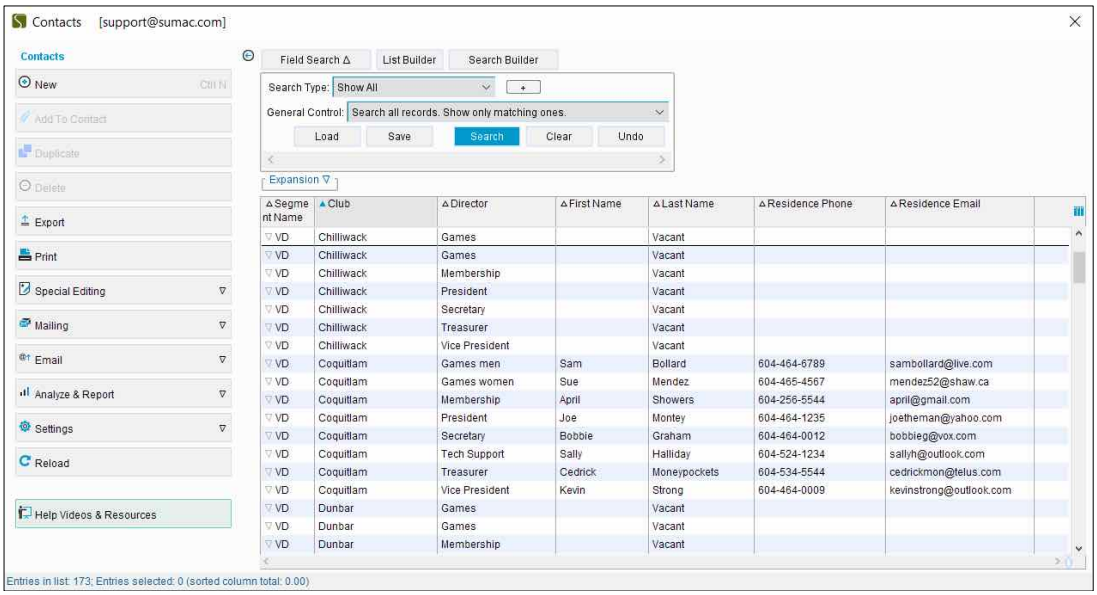
You may see the Director's screen in one of two ways:

1) **The director positions are named but have not been filled** with your club directors' names and contact information.



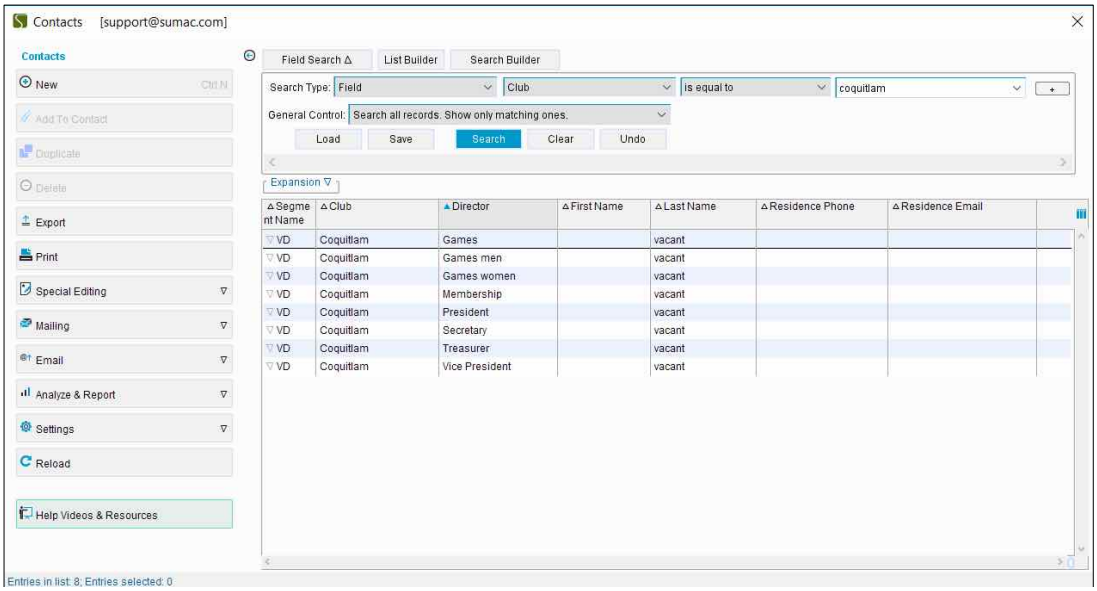
Maintaining & Changing the Directors Database

2) **The positions are completely filled in and you only need to update any changes.**



Segment Name	Club	Director	First Name	Last Name	Residence Phone	Residence Email
VD	Chilliwack	Games		Vacant		
VD	Chilliwack	Games		Vacant		
VD	Chilliwack	Membership		Vacant		
VD	Chilliwack	President		Vacant		
VD	Chilliwack	Secretary		Vacant		
VD	Chilliwack	Treasurer		Vacant		
VD	Chilliwack	Vice President		Vacant		
VD	Coquitlam	Games men	Sam	Bollard	604-464-6789	sambollard@live.com
VD	Coquitlam	Games women	Sue	Mendez	604-465-4567	mendez52@shaw.ca
VD	Coquitlam	Membership	April	Showers	604-256-5544	april@gmail.com
VD	Coquitlam	President	Joe	Montey	604-464-1235	joetheman@yahoo.com
VD	Coquitlam	Secretary	Bobbie	Graham	604-464-0012	bobbieg@vox.com
VD	Coquitlam	Tech Support	Sally	Halliday	604-524-1234	sallyh@outlook.com
VD	Coquitlam	Treasurer	Cedrick	Moneypockets	604-534-5544	cedrickmon@telus.com
VD	Coquitlam	Vice President	Kevin	Strong	604-464-0009	kevinstrong@outlook.com
VD	Dunbar	Games		Vacant		
VD	Dunbar	Games		Vacant		
VD	Dunbar	Membership		Vacant		

We will look at situation 1: Director's Position Named but not filled in

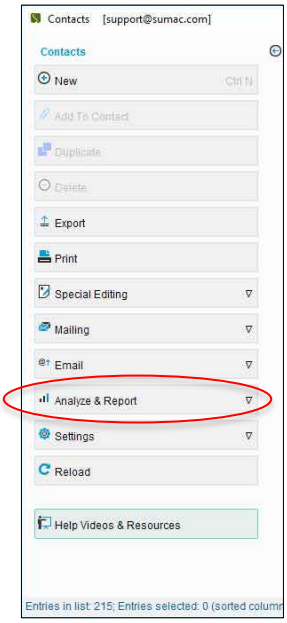


Segment Name	Club	Director	First Name	Last Name	Residence Phone	Residence Email
VD	Coquitlam	Games		vacant		
VD	Coquitlam	Games men		vacant		
VD	Coquitlam	Games women		vacant		
VD	Coquitlam	Membership		vacant		
VD	Coquitlam	President		vacant		
VD	Coquitlam	Secretary		vacant		
VD	Coquitlam	Treasurer		vacant		
VD	Coquitlam	Vice President		vacant		

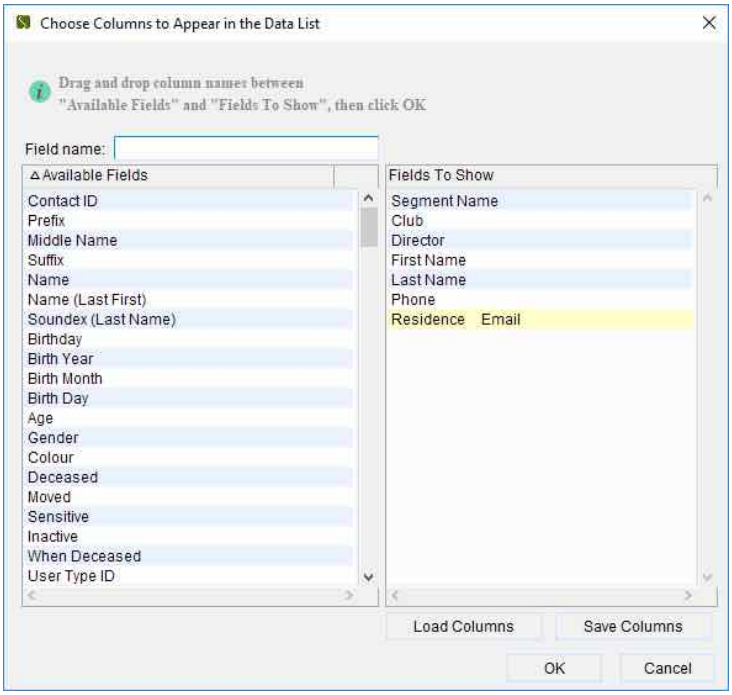
Note that the fields displayed above may have to be selected. It is recommended that the exact same field (columns) are displayed as above.

Maintaining & Changing the Directors Database

Select '**Setting**s' and then '**Columns**'



Drag and drop column names as required.



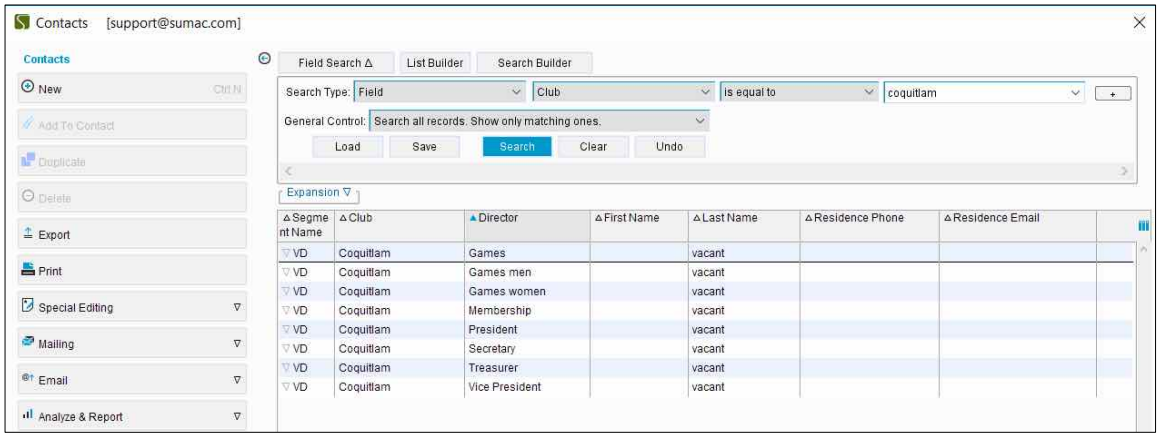
The following table describes the fields chosen:

Column	Description
Segment Name	Name of Region that your club is affiliated to; in our examples the V&D.
Club	The names of each club in the Region
Director	The title of each director in each club. Note that the core Directors (President, Treasurer and Secretary) are common names for all clubs, some clubs may have other Director names and functions.
All other column headings are self-explanatory	

Maintaining & Changing the Directors Database

We will now look at the first situation, entering your club director's information.

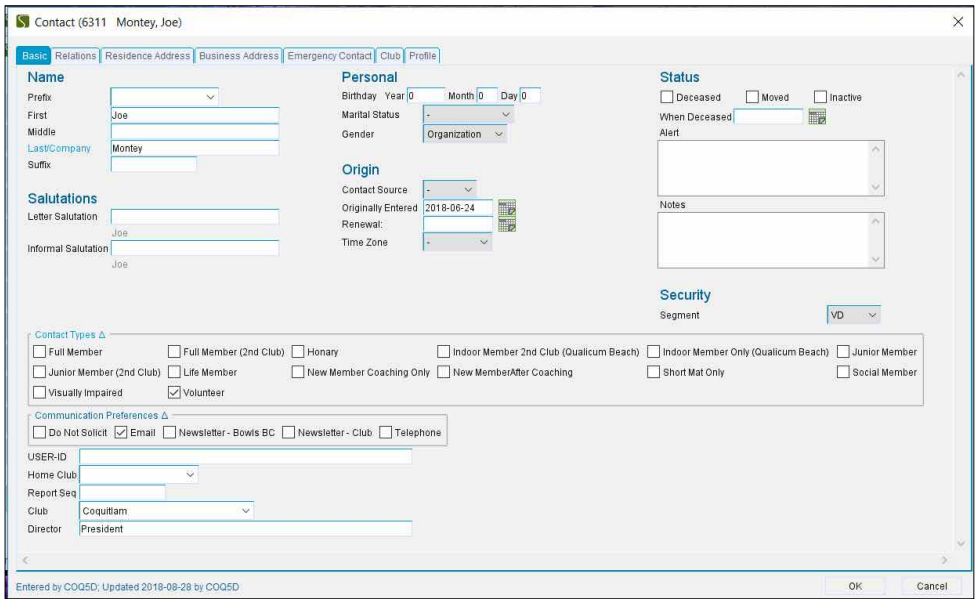
Coming off the 'Contact' window, search for your club director positions: ***Field***; ***Club***, '***equal to'*** , ***club name*** (example Coquitlam).



Click on a position (e.g. President) and it takes you to the **Basic** screen.

1) **Enter the correct First Name and Last Name** (overwrite what is currently there (in this case the word 'Vacant' in the Last Name box.

   DO NOT Change any other Data on this screen.



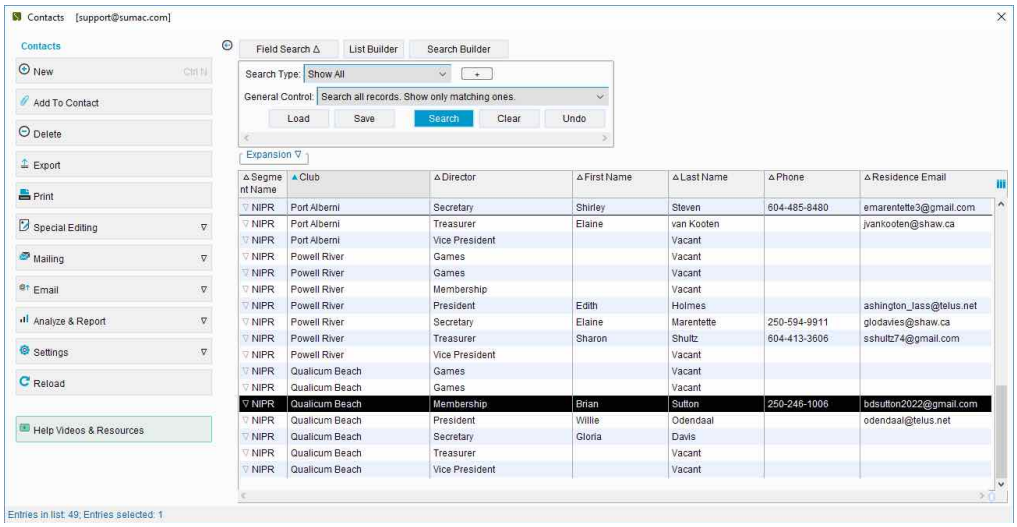
Maintaining & Changing the Directors Database

2) **Click on the Residence Address tab**.

   Update the phone number and email address on the Residence Tab. Do Not Change any other data.

3) **Click OK**.

The following screen shows that the update was successful.



Now repeat for any other Director for your club.

Maintaining & Changing the Directors Database

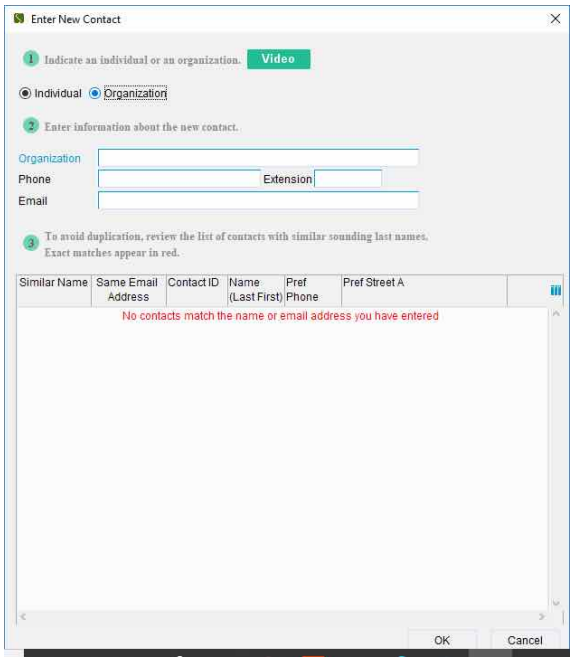
Adding a New Director Position

If your club has a director's position that is not listed, you can add it by carefully following these steps.

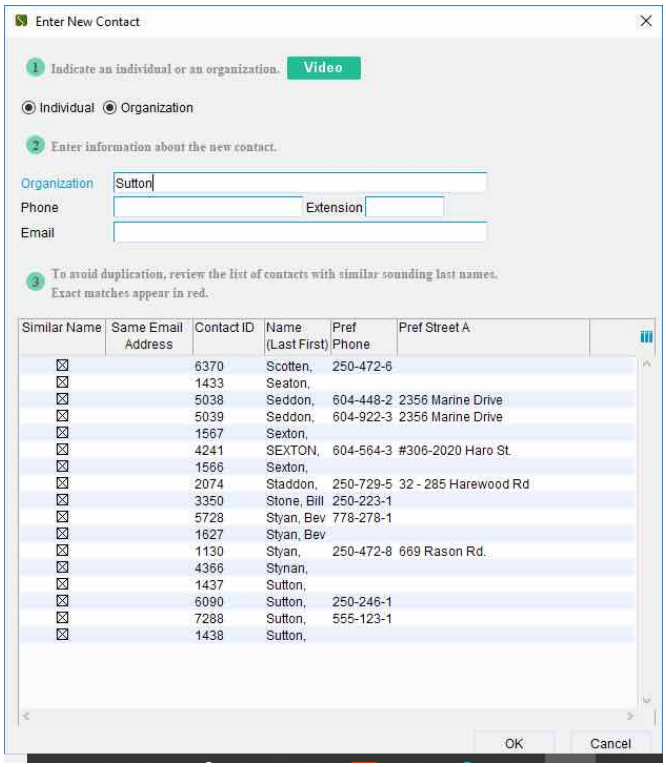
In the Contact menu select **New**

The '**Enter New Contact**' screen is presented

Select **Organization** and the screen changes as shown below

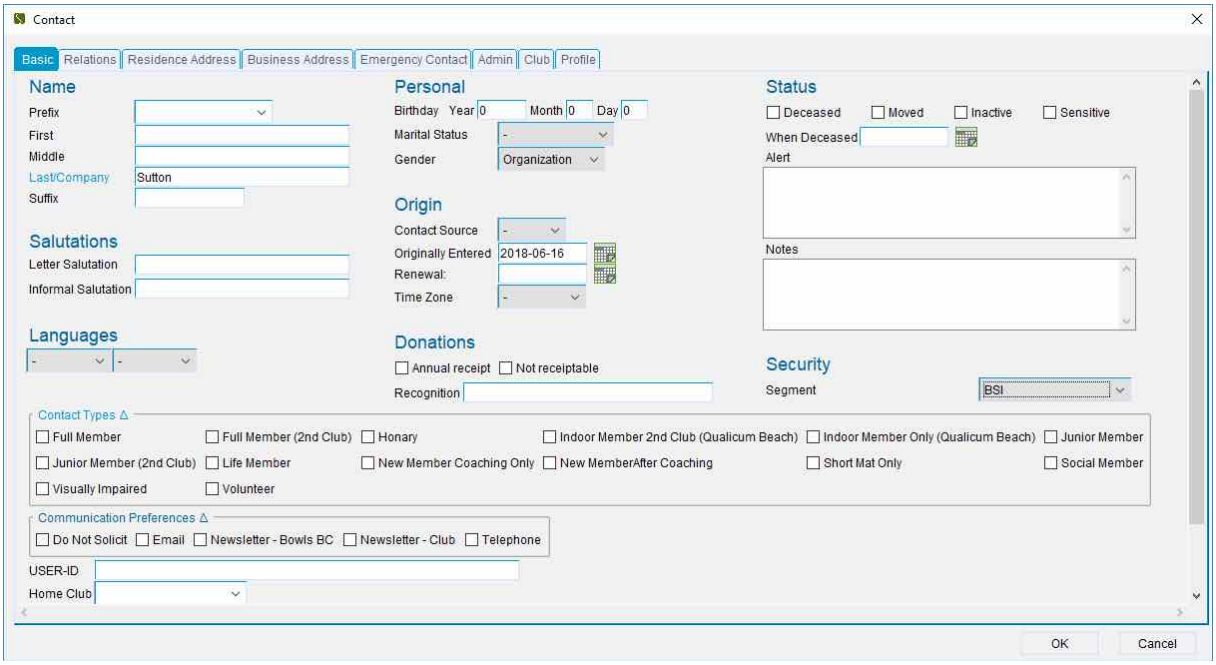


Enter the last name of the Director (in this Example 'Sutton' was entered). Note that similar last names are presented. ignore them and click **OK**



Maintaining & Changing the Directors Database

Adding a New Director Position

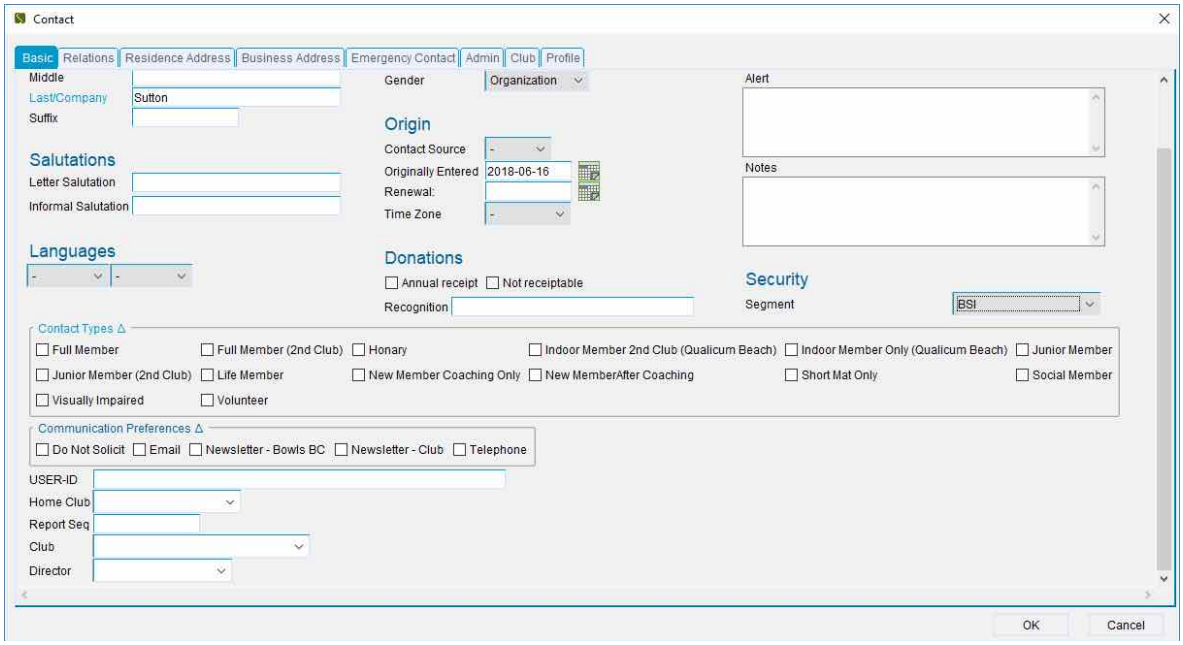


Note that

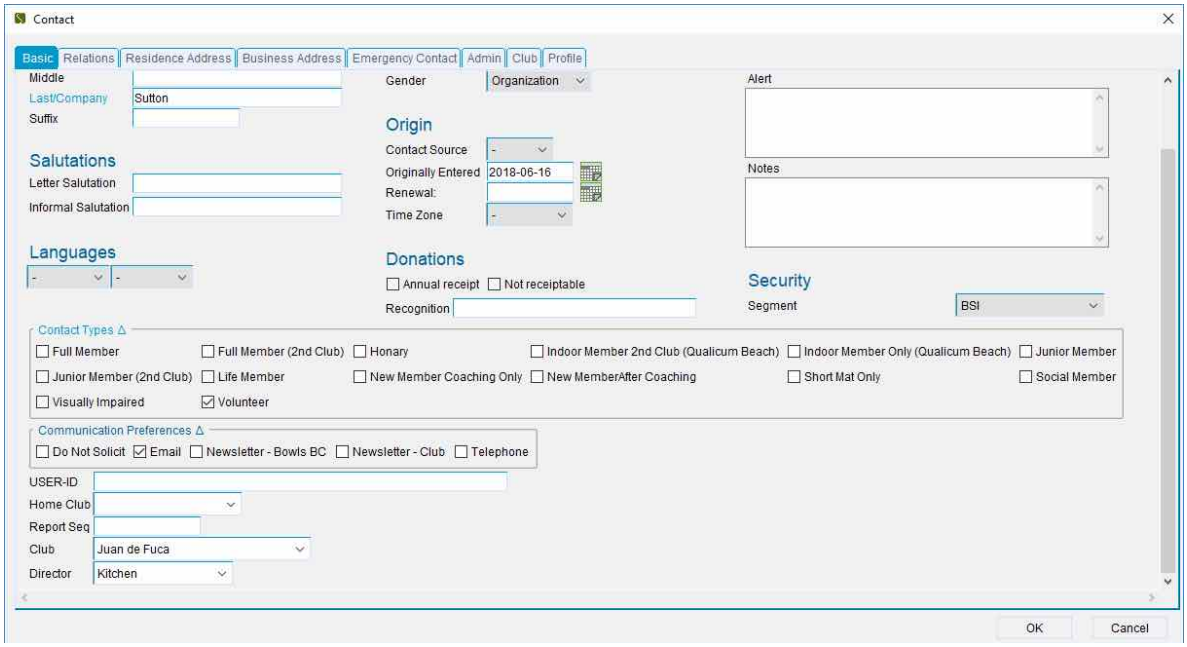
- the Name Sutton has been entered in the Organization field
- Segment has been prefilled with the region to which your club belongs

- **Enter the First name of the Director**, in this example 'Brian'
- **Select Contact Type** = Volunteer
- **Communication Preference Email**
- Scroll down the screen to reveal more fields

Maintaining & Changing the Directors Database



- **In the club box select your club name**; (in this example, Juan De Fuca)
- **In the Directors box** see if the title for your Director position exists



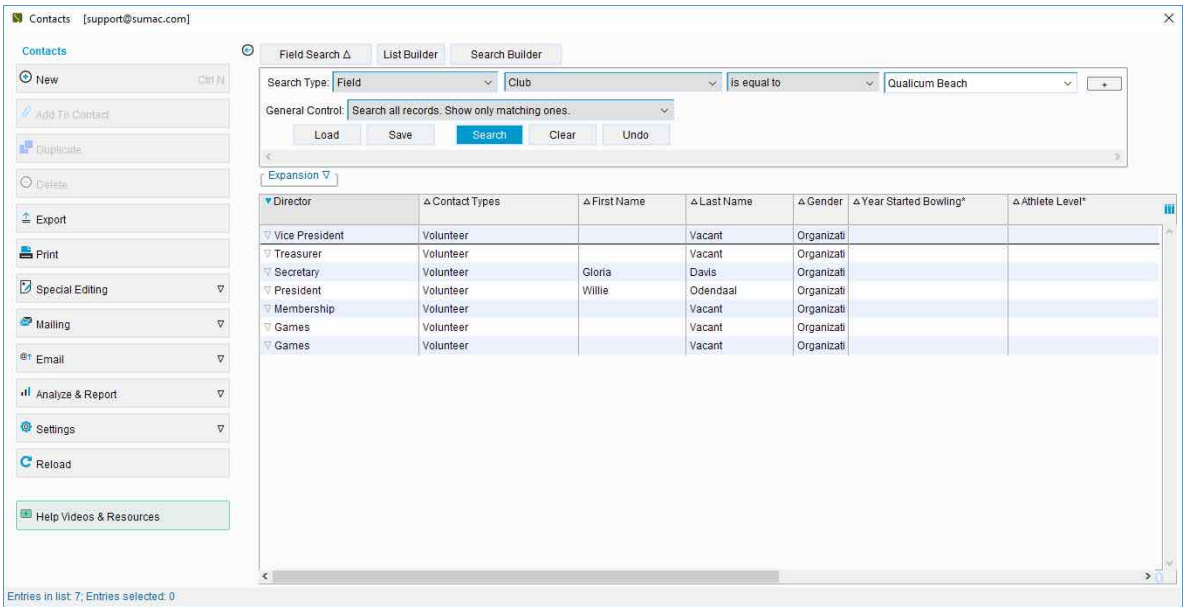
- Select the **Residence Address tab** and enter the phone number and email address for the Director.

Maintaining & Changing the Directors Database

Viewing the Club's Directors

For this example, the club used is Qualicum Beach
In the search criteria enter:

- Field = Club
- Equal To
- Qualicum Beach



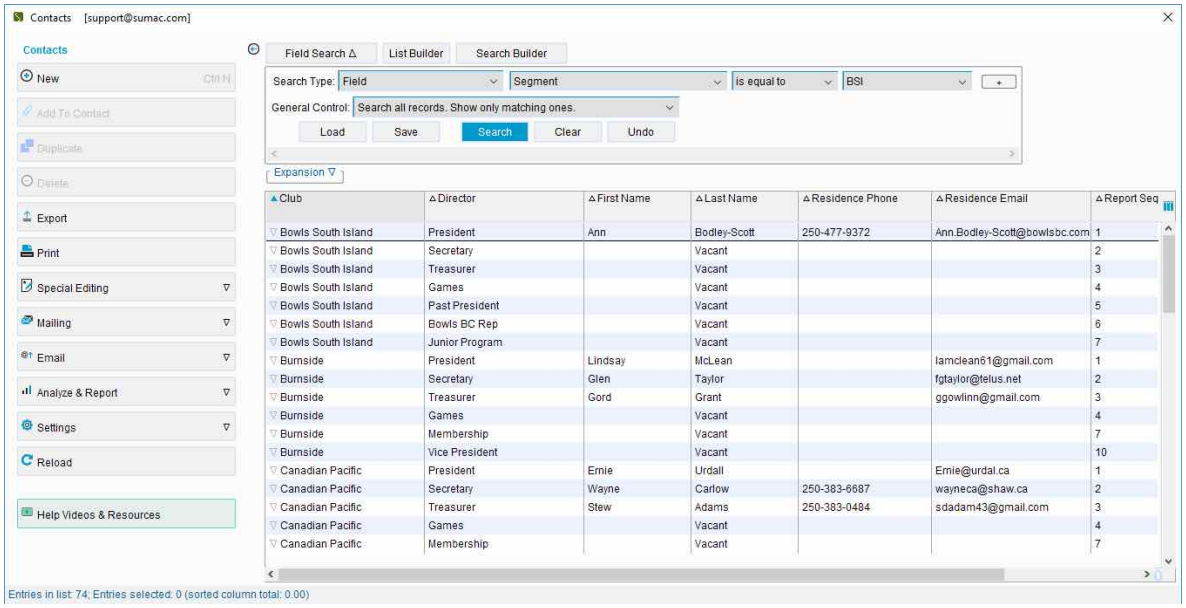
All the Directors for Qualicum Beach are presented. Note that many positions still have the last name as 'Vacant' as they have not yet been updated.

Maintaining & Changing the Directors Database

Viewing All District Club Directors in your District

For this example, the club used is Bowls South Island (BSI)
In the search criteria enter

- Field = Segment
- Equal To
- BSI



You will have to choose the columns to match this example. Note the field on the far right is sequence number. Sorting the results to look the same as this click **Report Seq** then **Club**.

To print this list, select and choose the fields to be printed. The column Report Seq can be removed without affecting the sequence of the report. Alternatively, the data can be exported to an excel spread sheet in .csv format.

How Do You Get an ID?

There are three categories of Club access:

1. Membership Database Administrator
2. Director Information Administrator
3. Director Information Viewer *(not implemented as yet)*

Club Directors, Regional Directors and Bowls BC Directors must apply and be approved for access to the Bowls BC Membership System. Membership data can only be viewed or maintained by authorized persons.

To get approved access to the Membership system, a person must be:

- a valid affiliated member of Bowls BC
- a Director of a Club, Region or Bowls BC or another approved person
- approved by the President of a Club, Region or Bowls BC

To obtain approval the "Request for Membership Approval" form must be submitted to the Membership Committee of Bowls BC.

The form must be printed, completed and signed. The original should be kept by the Club, Region or Bowls BC secretary. The form should be scanned in and emailed as follows.

Applicant	Approved by	Vetted by
Club member responsible for collecting Membership Data *OR* Club Director requiring view only access to Clubs' Director Data	Club President	Club President to membership@bowlsbc.com

Applicant Information

This form *(located at the end of this manual)* must be completed and signed by the person wishing to gain access to the membership System. The Applicant must check which types of access are required. An applicant may select more than one type of access.

By signing this form, the applicant agrees to the terms of security and privacy as described in these instructions.

Approval

This section must be completed by the person identified in the above table who must:

- Verify the Applicant is allowed access requested
- Ensure that the applicant is aware of and has read and agrees to, abide by the security and privacy of the data held in the membership System.

The original of this form must be kept by the club's secretary.

A copy of the form should be emailed to the person identified in the above table responsible for verification.

Verification

When the applicant has been verified, the form is emailed to the Membership Committee.

Membership Committee

ID's are created together with passwords as required. The ID assigned to the applicant is written onto the form in the ID Assignment section. The Membership Committee emails the applicant the ID with temporary password.

When the above is completed, the form is dated and filed.

Privacy and Security of Membership Data held in the Membership System

All parties having access to the Membership System agree:

- Not to share ID's and Passwords with anyone. If more than one person has responsibility for managing the membership data, then all such persons must be approved for their own ID and password.
- That Owners (applicants) of ID's and Passwords must notify the Membership Committee at Bowls BC immediately their role changes and they no longer require access to the Membership System.
- That Membership data identifying a member (name, phone number, postal address or email) cannot be shared with any person or organization without the express approval of the member.
- That anonymous data used for statistical purposes for the running of the club, region or Bowls BC does not require members approval.

The access request form is available at the end of this manual.

Loading the Sumac System on Your Computer

Steps:

1. If you haven't already done so, in your web browser enter: sumac.com and download the **free Trial Version**.
2. **It is recommended that you use the Google Chrome web browser for all these downloads.** You will also be asked to load the latest version of **Java** which does not work with the Microsoft Edge web browser nor some versions of the Firefox web browser.
3. After the download you may be contacted by a Sumac rep representative. Reply that you are part of the Bowls BC implementation and you won't receive any more sales inquiries. The full Sumac version contains all their modules; just **look at the Membership module**, the only one Bowls BC is using.
4. You will also need to have a remote desktop program called **TeamViewer** which Brian Sutton or other implementor will use to assist you in installing your club's database. Go to https://www.teamviewer.com and down load the ***Free Personal Use*** version.
5. Send off your access ID application form to Brian Sutton.

After receiving your approved ID application form:

1. Brian Sutton will contact you regarding whether you want your current Excel membership database to be uploaded into Sumac.
2. Once your membership Excel file is converted, it will be sent to you for uploading into Sumac.
3. Download the file to your computer *(the Desktop is a recommended place, but your choice)*,
4. Brian will contact you via phone (which will need to be near your computer) and will use the TeamViewer program on your computer to help you install your club's database on Sumac.

HELP

Sumac has **help videos** (available on just about every screen) and a link to **text information** is available on their home page. Their support line is: **1-416-504-8724**.
Note: Long distance charges may apply.

Brian Sutton, Bowls BC Sumac Administrator, can also provide technical support on the Bowls BC implementation at membership@bowlsbc.com

REINSTALLING A MALFUNCTIONING SUMAC ICON

The Sumac icon on your desktop may not function, particularly when Java is updated. Here are the steps to take if that happens.

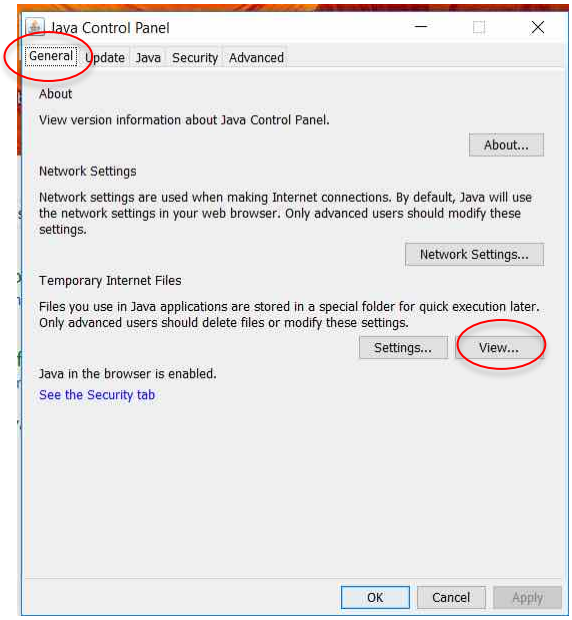
Windows OS

Click on the **Start Menu** and choose **Control Panel.**

In the Control Panel, choose **Programs**, the choose **Java** to open the Java Control Panel.

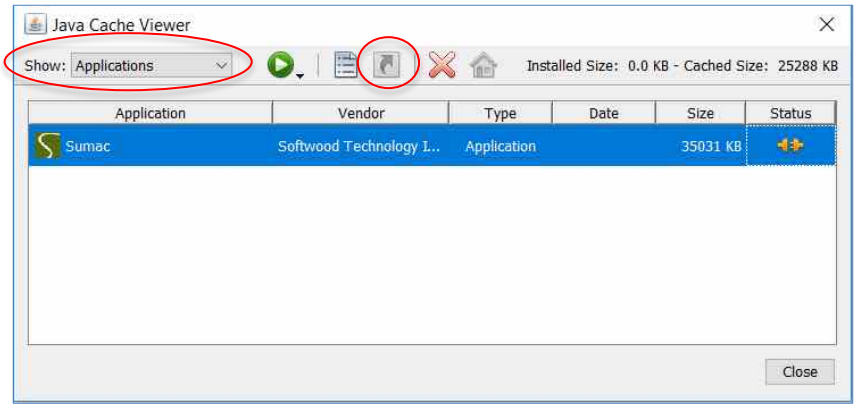
Mac OS

'Click on **System Preferences** and choose **Java.**



1. Once you have the **Control Java Panel** open, on the **General Tab**, click the **View** button to open the **Java Cache Viewer.**

2. In the Java Cache Viewer, make sure the 'Show' drop-down window is set to **Application**.



3. Click on the 'Sumac' line and then click on the **black arrow curved upwards.**

4. This will install a new Sumac shortcut. Click **Close** when finished.

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APPENDIX

Community Engagement

This section of the database is currently being considered for implementation and is not yet active. More information will follow as details become available.

Starting in September 2018, Clubs will be required to separately report the following.

The number of individuals that registered with your club for events that are NOT Bowls BC affiliated members. This information is collected to help measure the community engagement and use of your facility, as well as public exposure to our sport.

Bowls BC understands that this information may not be tracked accurately. Please provide your best estimates if you do not have access to accurate information. Please only count individuals once (unique participants).

Number of Recreational Participants
Number of Short-Term/Day Event Participants
Number of Volunteers

> *Example:* ***Recreational Events:*** *If your club has a corporate league where 12 individuals (not regular members) play once per week, report 12 for this event. If you also have a drop-in league where your club had 40 participants (not members) throughout the year, report 40 for this event. The total number of participants (not members) reported for all Recreational Events would be 52 (12+40).*
> ***Recreational Events are typically recurring, such as recreational leagues.***
>
> *Example:* ***Day/Short-Term Events:*** *When hosting a charity tournament, your club has 50 participants (not members) – report 50 for this event. If you host numerous Day/Short-Term Events, add the number of all participants (not members) for all Day/Short-Term Events and report the total.*
> ***Day/Short-Term Events are typically events that run just one day, of over the weekend.***
>
> *Example:* ***Volunteers****: If your club hosts a charity event and has 25 volunteers (not members) to help with the event, report 25 under Volunteers. These volunteers may be friends, family, members of the community or other organizations. Bowls BC suspects that there are very few volunteers that are not members or social members that are volunteers, so do not be surprised if this number is reported zero.*
> ***Volunteers are typically people that help out during larger events (charity events, Provincial Championships, National Championships, etc.)***
>
> Remember, the purpose of this section is to determine how many people are participating in lawn bowling in BC that are not otherwise reported as Bowls BC affiliated members. **Please report total amounts for the whole season to date.**

Insert Club Logo **Insert Club Name**

MEMBERSHIP APPLICATION

Please complete a separate form for each household member. Returning members complete only if info has changed.

Name: (*in full*) _____

Address: _____

City: _____ **Postal Code** _____

Telephone: _____ **Email Address:** _____

Emergency Contact: _____ **Relationship**: _____ **Phone:** (_____) _____

The following Information is REQUIRED by Bowls BC for statistical and funding application purposes:

Age Category *(please circle one):* **1-12 13-17 18-25 26-54 55+** *Club Optional* **Year Born:** _____

Gender: ☐ **Female** ☐ **Male** ☐ **Other** **Year Started Bowling**: _____ **Year Joined Club**: _____

QUALIFICATIONS ***Information REQUIRED by Bowls BC.*** *Please check if applicable.*

COACH: ☐ Club Level ☐ Competition ☐ Competition Development ☐ Competition High Performance
Coach Criminal Record Check: Year _____ **UMPIRE**: ☐ Club ☐ National

COMPETITON LEVEL *(Highest in last 3 yrs.)***:** ☐ Club ☐ District ☐ Provincial ☐ National ☐ International

I AM WILLING TO SERVE AS A CLUB VOLUNTEER in the following area(s). Please circle **at least one**:

Kitchen/Social Games Buildings Coaching Executive Greens & Grounds Tournament Convener

Are you able to receive and print emails or electronic messages? (*please circle*) **YES NO**

The following request for your consent ***is a requirement of the Personal Information Protection Act of British Columbia.*** *(Please Circle YES or NO).* **I CONSENT TO:**

The publication of my name and telephone number in the Club directory…….. YES NO
The use of my email address by the President/Executive Committee for Club notifications …….. YES NO
Club Executives (Required) Use of hone and email address by Bowls BC for notification purposes .. YES NO

_____ _____
Signature *Date*

MEMBERSHIP FEE SCHEDULE *(Please check the category that applies to you)*

☐ **Club Full Member**…… Fee $

☐ **Full Member: Other Club:** *Designate your **HOME** club:* _____ Fee $

☐ **Social Member** …… Fee $

ADMINISTRATION USE ONLY: ***Cheque Cash Receipt Issued.*** Date: _____

Emergency Contact Card filed _____ Locker # _____

Sept 2018

REQUEST FOR MEMBERSHIP SYSTEM ACCESS

APPLICANT INFORMATION	
Name:	Directors Position:
Club:	
Phone Number:	Email:
Access Requested: ☐ Update Membership Data ☐ Update Director Data ☐ View Only Director Data	
Signature:	Date:

APPROVAL	
Name:	Directors Position:
Phone Number:	E-mail:
Signature:	Date:

VERFIFICATION – OFFICE USE ONLY	
Contacted Approver:	
Approved by Bowls BC – Name:	
Signature:	Date:

ID ASSIGNMENT – OFFICE USE ONLY	
☐ ID Assigned for Update Membership Data	
☐ ID Assigned for Update Director Data	
☐ ID Assigned for View Only Director Data	

CONFIRMATION EMAIL SENT TO REQUESTER AND APPROVER
Date:

By signing this form, you agree to the terms of security and privacy as described in the instructions on how to complete this form.