

|  |   |
|--|---|
| Change Request<br><b>Title</b>             | <b>Clone Events</b>   |
| Change Request<br><b>Number</b>            | <b>CR01 - Version 3</b>   |
| <b>Version</b>                             |   |
| <b>Brief Description of Change Request</b> | Enable administrators and event organisers to clone an event from an existing event   |
| <b>Reason for Change Request</b>           | Currently if an administrator or event organiser wishes to create a series or a carnival, each event has to be created from scratch. This is time consuming, particularly with re-creating Entry fees and deadlines and Services.<br><br>Administrators are often required to setup series where the events are almost identical.   |
| <b>Overview</b>                            | This change request would enable an administrator/event organiser to select an event to clone and then specify the new event's name and start date plus add some of the parameters to be included in the cloning process.<br><br>At the end of the process, Eventor would remain in edit mode so that the administrator/event organiser can make final changes to the cloned event if required. |

## Triggering Clone Event

The administrator/event organiser can start the process in one of two ways:

1. select '**Clone an event**' from the administrator's side menu (see Appendix Screenshot 1)
2. select '**Clone event**' from a selected event's top menu (see Appendix Screenshot 2)

**If Method 1 is used** a pop up will appear and the administrator/event organiser will be asked to:

- enter the Event ID of the event to be cloned.

If no event is found the message 'event not found' will be displayed in a new popup which will include a button for the user to 'cancel' the popup message. If 'cancel' is selected the popup will close.

If the event is found, the **Clone Event Screen** as below will be displayed

**If Method 2 is used** the **Clone Event Screen** as below will be displayed

## Clone Event Screen

The heading 'Event to be cloned' will be displayed' and below that the name and start date of the event to be cloned will be displayed. (See Appendix Screenshot 3)

Input boxes will be provided for the 'New Event':

- the **Name** of the new event
- the **Start date** of the new event

Radio button field will be provided for:

- Copy **Arena and competition area** to the new event? 'Yes' 'No' (default is 'No')

Radio button field will be provided for:

- Copy **Documents and Links** to the new event? 'Yes' 'No' (default is 'No')

Radio button field will be provided so that for '**Entry fees and deadlines**' one of the following can be selected with the first one to be the default.

- copy 'from' and 'to' dates and adjust the 'to' and 'from' dates to match the new event start date
- copy 'from' and 'to' dates as listed in the event to be cloned to the new event

The administrator/event organiser would then be asked to press 'Save' or 'Cancel'

If 'Cancel' is selected, the administrator/event organiser would be returned to the 'Club Events' page (or if not possible, returned to the calendar)

If 'Save' is selected the Name and Start Dates will be validated by Eventor:

If invalid, a pop-up error message would be displayed and when closed the administrator/event organiser will be returned to the Clone Events Screen to try again.

If the fields pass validation, Eventor will then apply the following business rules.

## Business Rules for creation of new events

- All information from the '**General Information**' screen will be populated into the new event with the Name and Start Date replaced with the new Name and Start Date.
- All information from the '**Organisers and officials**' screen will be populated into the new event.
- If the administrator/event organiser has indicated they wish to copy the '**Arena and competition area**', this information will be copied to the new event otherwise it will be left blank.
- The **Class types and event attributes** will be populated into the new event.
- The **Classes** will be populated into the new event.

- Depending on the answer provided by the administrator/event organiser, the '**Entry fees and deadlines**' will be populated into the new event with:
  - either the 'from' and 'to' dates will be adjusted to match the new event date (\*see example below)
  - or the 'from' and 'to' dates will be copied as is from the old event to the new event.

All other information from **Entry fees and deadlines**' will be populated into the new event

- All information on the '**Services**' screen will be populated into the new event.
- If the administrator/event organiser has indicated they wish to copy '**Documents and Links**', this information will be copied to the new event otherwise it will be left blank.
- All information on the **Payments** screen will be populated into the new event.
- The **Status** of the new event will always be set as 'created'. If the new event is a state or national event, the administrator will need to 'assign dates' and then return to the new event to change its status.

*\*Example of adjusting the event date in Entry fees and Deadlines:*

*If the new event is 7 days after the original event and an administrator selects to use adjust the 'to' and 'from' dates, the new 'to' and 'from' dates will be the original 'to' and 'from' dates plus 7 days.*

## **Popup Screen after the new event is saved**

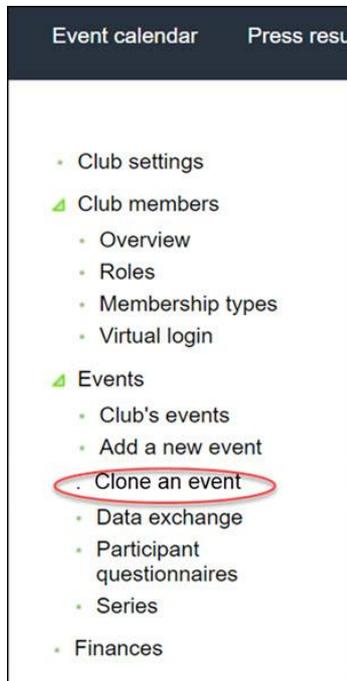
Following the creation of the new event, a popup message will be displayed to indicate "new event has been created". The name, start date and event Id will also be listed. The bottom line of the message will display a 'Next' button.

On pressing 'Next' the administrator/event organiser will be returned to normal 'edit' mode for the new event.

# Appendix

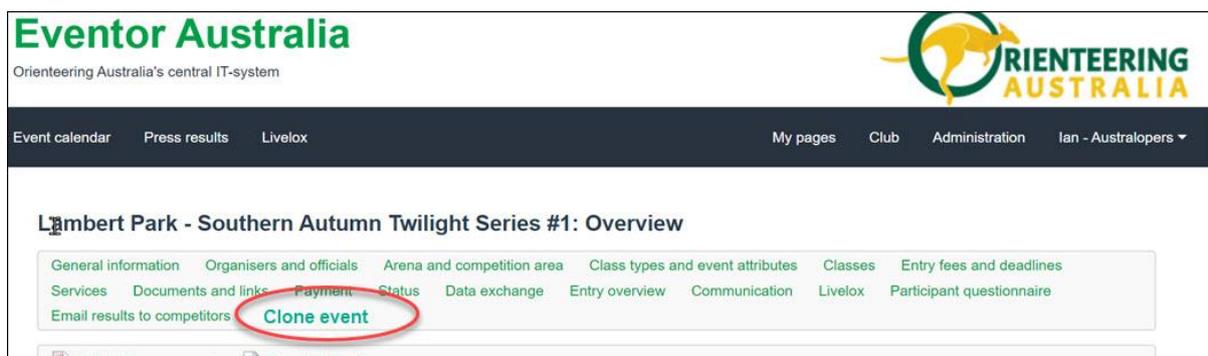
## Screenshot 1

Starting Clone an event from the administrator side menu



## Screenshot 2

Clone an event from a selected event



### Screenshot 3

#### Clone Event Screen

**Eventor Australia**  
Orienteering Australia's central IT-system



Event calendar   Press results   Livelox   My pages   Club   Administration   Ian - Australopers ▾

#### Event to be cloned

Name: Princess Park - Melbourne Summer Series #1

Start Date: 20/10/2024

#### New event

Name:

Start Date:

Copy 'Arena and competition area' to the new event?  Yes  No

Copy 'Documents and Links' to the new event?  Yes  No

For 'Entry fees and deadlines':

copy 'from' and 'to' dates and adjust the 'to' and 'from' dates to match the new event start date

copy 'from' and 'to' dates as listed in the event to be cloned to the new event

Save

Cancel

|  |  |
|--|--|
| <b>Change Request Title</b>                | <b>Casual Registrations</b>  |
| <b>Change Request Number</b>               | <b>CR02</b>  |
| <b>Version</b>                             | 1  |
| <b>Brief Description of Change Request</b> | Create a simplified registration process for Casuals within Eventor  |
| <b>Reason for Change Request</b>           | Consistent feedback from users is that the process needs to be as quick and simple as possible for newcomers.  |
| <b>Overview</b>                            | <ol style="list-style-type: none"> <li>1. Create a simplified registration process for Casuals within Eventor <ol style="list-style-type: none"> <li>a. Requires an additional option on the Login screen: <ol style="list-style-type: none"> <li>i. Create Casual Account</li> <li>ii. Create Member Account</li> </ol> </li> </ol> </li> <li>2. Include an additional process to enable one member of a household to register other members</li> <li>3. Create a simplified (limited) event calendar display for Casuals within Eventor <ol style="list-style-type: none"> <li>a. Events only in the State of origin of the Casual</li> <li>b. Timeframe covering (current month – 1) to (current month plus 2)</li> </ol> </li> <li>4. No changes required to My pages -&gt; My profile, etc. other than some changes to fields currently marked as Mandatory</li> <li>5. No changes required to entry process, access to results, etc</li> </ol> |

## Proposed Functionality Descriptions

### 1: Simplified registration and login as a State Casual in Eventor

#### Step 1: Select 'Create Casual Account'

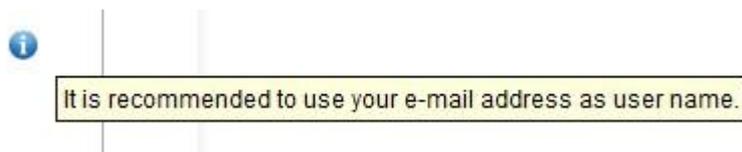


Need to provide two “create account” options on the existing login screen:

**Create Member Account** – existing process (as modified by other proposals)

**Create Casual Account** – see Step 2

Each option to have a “hover” function similar to the “i” buttons:



with the following explanatory text:

Member Account: “Full registration in Eventor and paid membership of a State/Territory Association and a Club of your choice, providing lower event entry fees to events, access to all events in Australia and access to all your results.”

Casual Account: “Simplified registration in Eventor with no membership fees but higher event entry fees and access to a limited range of events and results in your State/Territory.”

#### Step 2: [Create Casual Account] Enter the required details

These are the minimum details needed to create an account and enter an event:

Personal details

|                 |                                     |
|-----------------|-------------------------------------|
| First name *    | <input type="text"/>                |
| Last name *     | <input type="text"/>                |
| Gender *        | <input type="text" value="female"/> |
| Year of birth * | <input type="text" value="YYYY"/>   |

Contact details

Email \*

State

Emergency contact \*

[i](#)

Login details

Password \*

Repeat password \*

Note that State (Territory) needs to be mandatory. A separate proposal to split the Emergency Contact field into two (Name, Contact number) would also be applied here.

The Account would be created as usual using the email address as the logon (default), or the nominated username if a duplicate exists, and the nominated password.

Login details

Username ▲  [i](#)  
The username is already taken. Choose another username.

Password \*

Repeat password \*

A Search of the registered users (by first name, last name as per the existing function available to administrators) to establish whether the name combination already exists in an account

- If such an account exists, display Gender, Year of Birth and State and ask “Is this you? Yes/No”
- If “Yes” Merge the new information into that account (existing function available to administrators)
- If “No” proceed.

When the account is created, display the finalised Username with the following text:

“Your Casual account has been created in Eventor – please record your Username [xxxxxxxxxxxxxxxx] and Password for future logins.”

Finally, offer the opportunity to Register other members of the Household:

“Would you like to register other members of your household? – Yes/No?”

If “Yes”, proceed to Step 3 below.

If “No”, leave the new Casual logged into their account.

## 2: Simplified registration and login as a member of the same household.

### Step 3 Enter details for other members of the same household

Provide an option to register other members of the same household at the same time. (The time constraint only if necessary – if the registered Casual's details can be extracted from their account in a later session so much the better).

Display the same form as Step 2 with the following data pre-filled from the initiating account:

- Email
- State
- Emergency contact
- Password

The additional details needed to create an account for each new Casual from the household, all mandatory:

- First name
- Last name
- Gender
- Year of Birth
- Username

A Search of the registered users (by first name, last name as per the existing function available to administrators) to establish whether the name combination already exists in an account

- If such an account exists, display Gender, Year of Birth and State and ask "Is this you? Yes/No"
- If "Yes" Merge the new information into that account (existing function available to administrators)
- If "No" proceed.

When the account is created, display the finalised Username with the following text:

"Your Casual account has been created in Eventor – please record your Username [xxxxxxxxxxxxxxxx] and Password for future logins."

Repeat the offer the opportunity to Register other members of the Household:

"Would you like to register another members of your household? – Yes/No?"

If "Yes", proceed as above.

If "No", leave the originating Casual logged into their account.

### 3: Simplified event calendar display for a Casual in Eventor

Casuals will always be presented with a limited range of events in their State (Territory), generated by feeding specific parameters to the new calendar facility:

The screenshot displays the 'Event calendar | Activities' interface. At the top, there is a search bar with the placeholder text 'Search for competition' and a green 'SEARCH' button. To the right of the search bar is a '+ SHOW MORE FILTERS' button. Below the search bar, there are two date range selectors: 'Nov 2023' and 'Feb 2024', with a right-pointing arrow between them. To the right of the date selectors is a 'Regions' dropdown menu currently set to 'Orienteering WA'. Further right is an 'Event type' dropdown menu. Below these filters, there are two filter tags: 'Orienteering WA' and 'Nov 2023 - Feb 2024', each with a close button (an 'x' in a circle). To the right of these tags is a 'CLEAR' link. Below the filters, the text reads '19 events were found between 01/11/2023 and 29/02/2024.' To the right of this text is a 'View result as:' dropdown menu currently set to 'Calendar'. At the bottom of the interface, there are three labels with blue vertical lines pointing to the date range selectors: 'Current month - 1' points to 'Nov 2023', 'Current month + 2' points to 'Feb 2024', and 'State' points to the 'Regions' dropdown.

There is no requirement to lock this facility – if Casuals work out how to expand the display, so much the better.

## 4: Changes to My Pages for a Casual in Eventor

- Edit profile
- My memberships
- My events

### My profile

|                  |   |           |       |                    |               |             |
|------------------|---|-----------|-------|--------------------|---------------|-------------|
| Personal details | Contact details                         | Time zone | Login | Competitor details | Organisations | Information |
| Person ID        | 1551                                    |           |       |                    |               |             |
| First name *     | <input type="text" value="Jack"/>       |           |       |                    |               |             |
| Last name *      | <input type="text" value="Dowling"/>    |           |       |                    |               |             |
| Gender *         | <input type="text" value="male"/>       |           |       |                    |               |             |
| Nationality *    | <input type="text" value="Australia"/>  |           |       |                    |               |             |
| Date of birth *  | <input type="text" value="26/04/1949"/> |           |       |                    |               |             |

Save

Only Year of Birth is required (DoB can be dummed up with 01/01 if necessary)

- Edit profile
- My memberships
- My events

### My profile

|                         |   |           |       |                    |               |             |
|-------------------------|---|-----------|-------|--------------------|---------------|-------------|
| Personal details        | Contact details                                   | Time zone | Login | Competitor details | Organisations | Information |
| Email *                 | <input type="text" value="tojo1hdf@inet.net.au"/> |           |       |                    |               |             |
| Phone number (landline) | <input type="text"/>                              |           |       |                    |               |             |
| Phone number (mobile)   | <input type="text" value="0419049317"/>           |           |       |                    |               |             |
| Street address *        | <input type="text" value="11 Robin Road"/>        |           |       |                    |               |             |
| City *                  | <input type="text" value="Roleystone"/>           |           |       |                    |               |             |
| Postal code *           | <input type="text" value="6111"/>                 |           |       |                    |               |             |
| State                   | <input type="text" value="WA"/>                   |           |       |                    |               |             |
| Country *               | <input type="text" value="Australia"/>            |           |       |                    |               |             |
| Emergency contact *     | <input type="text" value="Sue 0418901129"/>       |           |       |                    |               |             |

Save

Street address and City do not need to be mandatory

State needs to be mandatory

Country can be defaulted to Australia

|  |   |
|--|---|
| <b>Change Request Title</b>                | <b>New Member Notifications</b>   |
| <b>Change Request Number</b>               | <b>CR03 - Version 2</b>   |
| <b>Brief Description of Change Request</b> | Send notifications regarding new members to each organisation's nominated email address(es).  |
| <b>Reason for Change Request</b>           | Currently there is no process to notify club administrators whenever a new member joins a club or state. Club and state administrators would like to be notified about new members so that they can be welcomed.  |
| <b>Overview</b>                            | <p>This change request will enable an administrator of an organisation (eg club or state) to nominate one or more email addresses that will be used to send a daily notification of the names and details of all new members.</p> <p>The process will involve a scheduled task to run daily to check for new members of each organisation. If new member(s) are found for that day, email will be sent to the nominated email address(es) listing the id, names, sex, year of birth, membership types and email address of the new members.</p> |

### **Setting up *New Member Notification Email Address(es)***

On the club settings page, the administrator will be able to record a valid email address or multiple email addresses with semi-colon separator(s) to be used for new member notifications. (see Appendix Screenshot 1)

To the right of the ***new member notification email address(es)*** field will be an information icon which on hover will display "enter a valid email address or valid multiple email addresses with semi-colon separator(s)"

On pressing the 'save' button, Eventor will check the validity of the email address(es). If the address(es) are not valid, an error message will be displayed requesting the administrator to "enter a valid email address or valid multiple email addresses with semi-colon separator(s)".

### **Daily Scheduled Task to Create Email Notifications**

Each day a scheduled task will be run to create email notifications.

For all organisations that have a ***new member notification email address(es)***:

- The process will locate all members who have taken out membership for that organisation in the previous 24 hours.
- The process will then check membership for the previous year and retain only those members who were not a member of that organisation in the previous year.
- The process will prepare an email that lists ID, First Name, Lastname, Sex, Year of Birth, Membership Type and email Address of all new members. (see Appendix Screenshot 2 for email template)
- The process will send the email with the 'to address' being the ***new member notification email address(es)*** and the 'from address' being ***Eventor <eventor-noreply@orientering.se>***

# Appendix

## Screenshot 1

Record email address or multiple addresses for notification of new club members

### Club settings for /Australopers

#### Organisation logotype

Eventor displays organisation logotypes in for example entry, start and result lists.



[Change organisation logotype](#)

#### Default settings for new payment events

Specifies the payment methods and account settings that are pre-filled in when new payment events are created.

[Change default settings for new payment events](#)

#### API settings

Eventor offers an API (Application Programming Interface) which enables automated reading of data, e.g. event calendar, entries and results. These data may be used on club websites or in custom applications. In order to use Eventor's API, an API key is needed. The key is generated below.

 [Guide: Access data via API](#)

API key: 2141e1824e8a45988d99eb47cb468076 | [Generate new](#)

#### Other settings

Require entry administrator role for ~~relay entry~~

Email address(es) for membership notifications

[Save](#)

#### Stripe settings

Eventor offers the possibility to take payment by card, for this to be possible the club needs to have a Stripe account.

[Connect organisation to Stripe](#)

## Screenshot 2

Template for email subject and body

|                  |  |            |              |            |                   |                 |                   |                 |      |              |            |        |       |                   |                 |      |              |            |        |       |                   |                 |
|------------------|--|------------|--------------|------------|-------------------|-----------------|-------------------|-----------------|------|--------------|------------|--------|-------|-------------------|-----------------|------|--------------|------------|--------|-------|-------------------|-----------------|
| <b>Subject</b> * | Notification of New Members of <Organisation Name>   |            |              |            |                   |                 |                   |                 |      |              |            |        |       |                   |                 |      |              |            |        |       |                   |                 |
| <b>Body</b>      | <p>This is a notification that the following new member(s) have joined &lt;Organisation Name&gt; within the last 24 hours</p> <table><tr><td>&lt;Id&gt;</td><td>&lt;First Name&gt;</td><td>&lt;LastName&gt;</td><td>&lt; Sex&gt;</td><td>&lt;YOB&gt;</td><td>&lt;Membership type&gt;</td><td>&lt;Email address&gt;</td></tr><tr><td>&lt;Id&gt;</td><td>&lt;First Name&gt;</td><td>&lt;LastName&gt;</td><td>&lt; Sex&gt;</td><td>&lt;YOB&gt;</td><td>&lt;Membership type&gt;</td><td>&lt;Email address&gt;</td></tr><tr><td>&lt;Id&gt;</td><td>&lt;First Name&gt;</td><td>&lt;LastName&gt;</td><td>&lt; Sex&gt;</td><td>&lt;YOB&gt;</td><td>&lt;Membership type&gt;</td><td>&lt;Email address&gt;</td></tr></table> | <Id>       | <First Name> | <LastName> | < Sex>            | <YOB>           | <Membership type> | <Email address> | <Id> | <First Name> | <LastName> | < Sex> | <YOB> | <Membership type> | <Email address> | <Id> | <First Name> | <LastName> | < Sex> | <YOB> | <Membership type> | <Email address> |
| <Id>             | <First Name>   | <LastName> | < Sex>       | <YOB>      | <Membership type> | <Email address> |                   |                 |      |              |            |        |       |                   |                 |      |              |            |        |       |                   |                 |
| <Id>             | <First Name>   | <LastName> | < Sex>       | <YOB>      | <Membership type> | <Email address> |                   |                 |      |              |            |        |       |                   |                 |      |              |            |        |       |                   |                 |
| <Id>             | <First Name>   | <LastName> | < Sex>       | <YOB>      | <Membership type> | <Email address> |                   |                 |      |              |            |        |       |                   |                 |      |              |            |        |       |                   |                 |

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|--|--|
| <b>Change Request Title</b>                | <b>Emergency Contact – Name and Number</b>   |
| <b>Change Request Number</b>               | CR04   |
| <b>Version</b>                             | 1  |
| <b>Brief Description of Change Request</b> | Split the current Emergency Contact field into separate fields for name and number   |
| <b>Reason for Change Request</b>           | The current single field is filled with inconsistent data which is not always fit for purpose  |
| <b>Overview</b>                            | Retitle the current “Emergency contact” field as “Emergency contact name” and preserve the existing data<br><br>Provide a new mandatory field for “Emergency contact mobile” |

### Existing field under My Profile:

Emergency contact \*  

### Proposed fields:

Emergency contact **name** \*  

Emergency contact **mobile** \*  

Both fields need to be accessible through the API.

|  |   |
|--|---|
| <b>Change Request Title</b>                | <b>Reduction of Scheduled Task Times for email Reminders and Removal of Unpaid Membership</b>   |
| <b>Change Request Number</b>               | CR05  |
| <b>Version</b>                             | 1   |
| <b>Brief Description of Change Request</b> | <p>Reduce the time period for email reminders and time taken before unpaid membership is removed from 17+ days to 3+ days.</p> <p>Make minor changes to wording of email notification.</p>  |
| <b>Reason for Change Request</b>           | <p>Currently Eventor takes 17 days plus the 'respite days' set by the local administrator before unpaid membership is removed. We wish to reduce this to 3 days plus 'respite days' set by the local administrator.</p> <p>Some improvements are also needed to the email notification to remove unwanted sentences and to accurately display the date of membership removal.</p>   |
| <b>Overview</b>                            | <p><b>Current business rules:</b></p> <ul style="list-style-type: none"> <li>• When membership is taken out, an email notification is sent to the customer even if the membership is unpaid.</li> <li>• After 'respite days' + 7 days, a reminder is sent to the customer that membership is unpaid.</li> <li>• After 'respite days' + 12 days, a second reminder is sent that membership is unpaid.</li> <li>• After 'respite days' + 17 days, both the club and state membership is removed if either is unpaid.</li> </ul> <p><b>Proposed new business rules:</b></p> <ul style="list-style-type: none"> <li>• When membership is taken out, an email notification is sent to the customer even if the membership is unpaid. (no change to scheduled task but see Appendix 1 for changes to the email)</li> <li>• After 'respite days' + 1 day, a reminder is sent to the customer that membership is unpaid.</li> <li>• After 'respite days' + 2 days, a second reminder is sent that membership is unpaid.</li> <li>• After 'respite days' + 3 days, both the club and state membership is removed if either is unpaid.</li> </ul> |

## Appendix 1

### Proposed changes to the notification of membership

*Note: the existing date highlighted below currently shows <today's date + 'respite days'>. It needs to be <today's date + 'respite days' + 3 days>*

Thank you for your membership application!

This is a confirmation that membership applications for the following organisations have been received.

Orienteering Tasmania (2024)

Australopers (2024)

Please note that the membership is only approved when the full payment has been received and registered. If the payment has not been received by <today's date + 'respite days' + 3 days>, the membership will be removed from the system.

Payment is to be made according to the instructions of the organisation you are becoming a member of. Be sure to provide your reference number during payment. When payment is made, it normally takes a couple of days before it is received and registered. An e-mail receipt will be sent out when the payment is received and approved.

An overview of your memberships is found at  
(URL is displayed)

Payment is made at the following link:  
(URL is displayed)

Note that it is not possible to reply to this message.