

## Preparing Compass for the New Year- Notes

The first of a series of Zoom forums to be presented by Mike Neels of Cambridge. These will be run as an adjunct to a WhatsApp support group for Compass scorers. **Form to be 40-minute recorded Zoom sessions - Mike sharing desktop with attendees. Main headings are covered briefly using quick demos as required. Aim to spend 20 minutes on this then rest of time with Q&A. Session recordings and notes attached to reports published on WB website**

- First step: read the Help topic *Preparing for a New Year* (references to HelloClub [HC] synonymous with Compa\$\$). **PDF print-outs attached to website article**
- Create Next Year' calendar in Other Services > Club Calendar of Events (CCOE). 3 methods: 1) input manually 2) Copy Manually 3) Export to edit in Excel. This can be done months out. **Demo with (cleared out) CB THUD**
- Edit your Next Year events - perhaps in Excel after running Year Roll then import back in. **Demo both methods – advance a week because of Waitangi Day 6-Feb**
- If you publish to Milan results you must ensure each series has a unique name
  - eg1 - Mitre-10 Monday Pairs & Mitre-10 Friday Pairs. Milan's site groups competitions by name so "Mitre-10 Pairs" would jumble Monday and Friday results
  - eg2 - If a series runs for more than six months it should be named eg 2025 Club Trophy to avoid 2024's "Club Trophy" getting bundled with 2025's "Club Trophy"
- Use OWL for Teams and Swiss Pairs events (because you keep adding to the initial input file)
- Import of Director IDs is available any time you have a schedule
- Bear in mind the possibility of setting Intuitive Dates in CISU > Club Options\_(1) where entries in CCOE are not necessarily needed. No ladders, web results may take managing

### Results: Multi Session Events

Monday Morning	S49 S50
SUMMERSET RETIREMENT VILLAGE - Pairs	Ladder S1 S2

- If you intend to publish a programme booklet (CCOE > Options > Printer Version **(demo)** produces an editable print lay-out of your Calendar). Ideally ALL this sort of data for your booklet should come from Compass (the Bible) rather than bend Compass to what gets published. Tidy up any duplicates first
- Set up next year subs (and Compa\$\$) rates

Integral with moving to a new year is the tidiness of your database.

- In early November, maybe, use Email Options > Member Info to request any changes to member details held **(demo)**
- Before NZB quarterly invoicing and particularly before Year Roll: to ensure that you're not being correctly charged for NZB fees and levies
  - Run NZB reconciliation from Databases > Database Updates – **Club Admin database > Database Updates > Reconcile NZB Database > run and respond to the three Analyze steps. Common issues**
    - **Active member NZB has belonging to another club**
  - Check masterpoints have gotten through - **NZB Masterpoints > Reconcile Masterpoints > log in to nzbadmin > Results > highlight and copy to clipboard all on page 1 > note and set date range in Compass > import clipboard.** Sometimes errors thrown up can point to faulty setup of CCOE
- Wait for 1-Jan (CISU flips to next year all by itself)
- Check and align Basic and Current Year member types after 1-Jan (for historical record) and before invoicing the membership – NB especially change in membership Type (eg Learner → Full)
- Double-click on Compass Version Number to get a calendar with ISO-8601 Week Numbers for dealing room
- Remove extraneous outdated ancient files/folders from :c/CompassV6 and dropbox/Club XX