Registration Management [User Guide]

mynetball
USER GUIDE

Registration Management

interactSPORT

Registration Management

An Association is responsible for managing the local settings that dictate Registration Management for their affiliates. Specifically, the Association must configure derived Registration Periods and Types using the framework set by the its governing State Body. Associations can also register their own members, either as part of an independent team or on behalf of their affiliated clubs.

State Users should perform the following tasks.

- Check the details of the State level Registration Types and create any derived Types which will be required.
- Check the details of the State level Registration Periods and apply any specific restrictions that are required.
- Manage accounts and record the payments of child organisations.

Setting Derived Registration Types

A Registration Type is a means of categorising registrations into a specific group and defining the fee that must be paid when a player is registered. When an Association user creates a derived Registration Type they must select the parent Registration Type from which the new Type will inherit. The Parent Type will determine the broadest possible age restrictions for the new type and the fee that the Association must pay to the State Body for each player registered.

Before an Association user can create Registration Types the relevant State Body will need to configure the State level Registration Types. Any questions about the available Registration Types you be directed to the relevant State Body.

(i) **Navigation**

Mode: Competition Management

Menu: Registrations -> Registration Types

Registration Type Management

Add Registration Type

Name	Parent Type	National	Min	Max	Active	Edit	Current Fee Structure
Senior Assoc	Senior NV	Senior NA	18	70	Active	Edit	$200.00/$300.00/$150.00
Junior Assoc	Junior NV	Junior NA	5	18	Active	Edit	$29.99/$39.99
1 year senior membership	Senior NV	Senior NA	18	100	Active	Edit	$58.99/$48.99/$35.99
1 year junior membership	Junior NV	Junior NA	0	18	Active	Edit	$0.00
4 year Platinum membership	Senior NV	Senior NA	18	100	Active	Edit	$0.00
2 year Premium membership	Senior NV	Senior NA	18	100	Active	Edit	$0.00

To create a new registration type Click on the **Add Registration Type** link:

This will open the **Registration Type Edit** page.

To save the new type fill in the fields and click **Update.**

Registration Type Edit

Back to Registration Type Management

Name *	
Description	
Parent Type	Senior NV [NV age: 18 to 100] ▾
Minimum Age	0
Maximum Age	100
Active	☐
Default fee	
Financial Type	Financial ▾

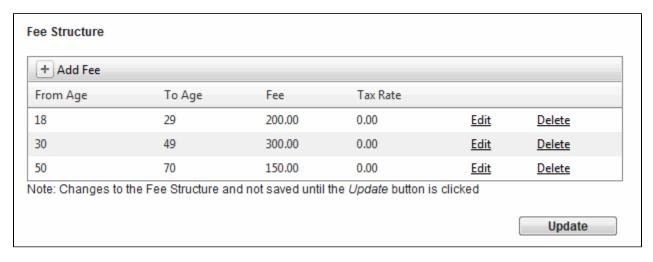Note: Changes to the Fee Structure and not saved until the *Update* button is clicked

Update

The following table describes each of the fields on this form:

Field	Field Description
Name	The name of the Registration Type
Description	A description of the Registration Type
Parent Type	The Registration Type that the new type will inherit from
Minimum Age	Validation criteria. The minimum age a player must be to have attained registration with this type (must be within range set by Parent Type)
Maximum Age	Validation criteria. The maximum age a player within this Registration Type (must be within range set by Parent Type)
Active	Determines whether or not the Registration Type is active. (Types that are no longer in use should be made inactive)
Default Fee	The fee that must be paid to the State Body for every player that is registered with this Registration Type
Financial Type	Financial / Non-Financial

A Registration Type can be configured to apply different fees to different groups within the general age group specified by the Parent Type. This allows Associations to offer special prices to certain groups of members while retaining the registration structure set by the State Body.

A list of fees for this Registration Type is displayed at the bottom of the **Registration Type Edit** page.

To change the details of a fee click the corresponding *Edit* link.

Fee Structure

+ Add Fee					
From Age	To Age	Fee	Tax Rate		
18	29	200.00	0.00	Edit	Delete
30	49	300.00	0.00	Edit	Delete
50	70	150.00	0.00	Edit	Delete

Note: Changes to the Fee Structure and not saved until the *Update* button is clicked

Update

To add a new fee to the Registration Type click the **Add Fee** button:

Fee Structure

+ Add Fee					
From Age	To Age	Fee	Tax Rate		

Age From: [   ]

Age To: [   ]

Fee: [   ]

Tax Rate: [   ]

Insert   Cancel

18	29	200.00	0.00	Edit	Delete
30	49	300.00	0.00	Edit	Delete
50	70	150.00	0.00	Edit	Delete

Note: Changes to the Fee Structure and not saved until the *Update* button is clicked

Update

The following table describes each of the fields on this form:

Field	Description
Age From	The minimum age of a member that this fee will apply to
Age To	The maximum age of a member that this fee will apply to
Fee	The price of registration for members who fall within this age range
Tax Rate	The rate of tax that applies to this fee (This will be included in the total)

Setting Registration Period Restrictions

Before an Association user can modify a Registration Period it must first be configured by the State Body. Any questions about the available or active Registration Periods should be directed to the State Body.
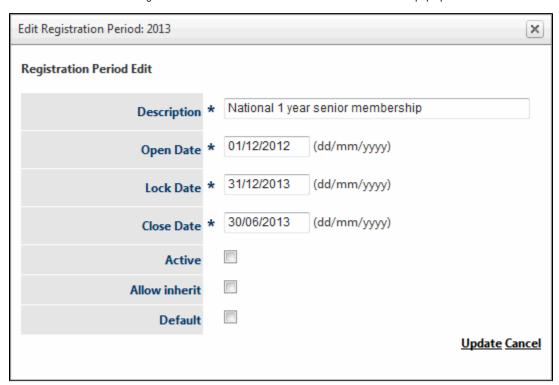
To edit a **Registration Period** click the corresponding **Edit** link.

Registration Period Management

+ Add New Registration Period							
Period	Date From	Date To	Open Date	Close Date	Status	Default	
2013	01/01/2013	31/12/2014	01/12/2012	31/01/2013	Active	✓	Edit

This will open the **Registration Period Edit** dialogue box.

Information from the Parent Registration Period that cannot be edited is not available in this pop up.

Edit Registration Period: 2013 ✕

Registration Period Edit

Description *	National 1 year senior membership	
Open Date *	01/12/2012	(dd/mm/yyyy)
Lock Date *	31/12/2013	(dd/mm/yyyy)
Close Date *	30/06/2013	(dd/mm/yyyy)
Active	☐	
Allow inherit	☐	
Default	☐	

Update Cancel

The following table describes each of the fields on this form:

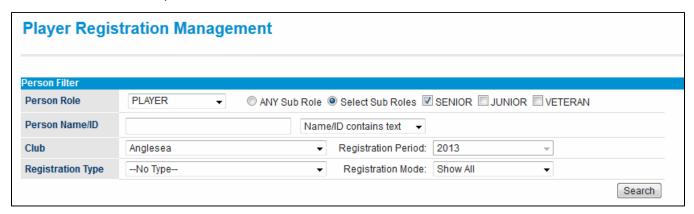| Field	Description
Description	A description of the Registration Period
Open Date	The date that player registrations begin. No players can be registered before this date
Lock Date	The date from which changes to registrations (de-registration) can no longer be made
Close Date	The date at which player registrations end. No players can be registered after this date

Active	Is this registration period active or not? Old registration periods should be made inactive
Allow inherit	Allows child organisations to create derived Period Types
Default	Sets the Registration Period as the default for child organisations

How to Register Members on a Club's Behalf

Before an Association user can begin registering members on a Club's behalf, the Club's player data must be entered into the system via Data import, Bulk upload or manual entry.

> **ⓘ Navigation**
>
> **Mode:** Competition Management
>
> **Menu:** Registrations -> Registration Manager

To filter the list of members, make your selections and then click **Search.**

The following table describes the options that are available in the filtering section:

Filtering Option	Function
Person Role	Filters the member list using the selected role / sub role
Person Name/ID	Filters the member list using a full or partial name or ID (ID can be ResultsVault ID or 3rd Party ID that has been stored in ResultsVault)
Club	Filter the member list to display only members of the selected club
Registration Period	Filter the list to show players that were registered in a particular Registration Period
Registration Type	Filter the list for members that have been registered with a specific Registration Type or who have not yet been registered at all
Registration Mode	Filter the list for members who have been registered using a certain mode (Show all, Primary, Secondary, Conversion)

To Register or De-register players select the players from the search results, choose an action from the Actions list and click **Perform Action.**

Actions		Register ▼	Perform Action

☐ Select All ☐ Select Visible Only (on current page) **Participants Currently selected: 5**

Drag a column to this area to group by it.   **Quick Filter*:** [   ]

Select	ID	Ext ID	Name		DOB	Age	Current Type	Reg Date	Expiry Date	Subs Status	Status
☑	448444		Aitken, Haylee	Edit	22 Mar 1982	30				NO	UNREGISTERED
☑	448464		AlldisX, Rachel	Edit	30 May 1992	20				NO	UNREGISTERED
☐	449769		Herman, Jessica	Edit	31 May 1985	27				NO	UNREGISTERED

1   Page **1** of **1** (69 items)

Notes

- *Type in the Filter box and hit Enter to filter the list.
- Sort the table by clicking a column heading
- Changing the page, sorting, or filtering the table does not affect any selections made in the table.

⤓ Download data...

To complete the registration choose the desired Registration Type then click **Register Participants.**

Register Participants   ✕

Register To :   Football & Netball Geelong

Participants Selected: 2

Registration Type: Senior Assoc ▼

                                              Register Participants

How to Register the Association's Members Directly to the State

Associations that run more casual competitions that involve independent teams that lack the central management of a club can register their members directly to the relevant State Body. This process can be done manually as described here or automatically by integrating registration into Online Member Sign up.

ⓘ **Navigation**

Mode: Competition Participation

Menu: Players -> Registration Manager

To filter the list of members, make your selections and then click **Search.**

Player Registration Management

Person Filter

Person Role	PLAYER	○ ANY Sub Role ● Select Sub Roles ☑ SENIOR ☐ JUNIOR ☐ VETERAN	
Person Name/ID		Name/ID contains text	
Club	Anglesea	Registration Period: 2013	
Registration Type	--No Type--	Registration Mode: Show All	Search

The following table describes the options that are available in the filtering section:

Filtering Option	Function
Person Role	Filters the database using the selected role / sub role
Person Name/ID	Filters the database using a full or partial name or ID (ID can be ResultsVault ID or 3rd Party ID)
Association	Filter the member list to display members registered to the selected parent organisation. (This will affect the Registration Types available for filtering)
Registration Period	Filter the list to show players that were registered in a particular Registration Period
Registration Type	Filter the list for members that have been registered with a specific Registration Type or who have not yet been registered at all
Registration Mode	Filter the list for members who have been registered using a certain mode (Show all, Primary, Secondary, Conversion)

To Register or De-register players select the players from the search results, choose an action from the Actions list and click **Perform Action.**

Selected Actions

Actions	Register	Perform Action

☐ Select All ☐ Select Visible Only (on current page) **Participants Currently selected: 5**

Drag a column to this area to group by it.   Quick Filter*:

Select	ID	Ext ID	Name		DOB	Age	Current Type	Reg Date	Expiry Date	Subs Status	Status
☑	448444		Aitken, Haylee	Edit	22 Mar 1982	30				NO	UNREGISTERED
☑	448464		AlldisX, Rachel	Edit	30 May 1992	20				NO	UNREGISTERED
☐	449769		Herman, Jessica	Edit	31 May 1985	27				NO	UNREGISTERED

1   Page **1** of **1** (69 items)

Notes

- *Type in the Filter box and hit Enter to filter the list.
- Sort the table by clicking a column heading
- Changing the page, sorting, or filtering the table does not affect any selections made in the table.

Download data...

To complete the registration choose the desired Registration Type then click **Register Participants.**

Register Participants
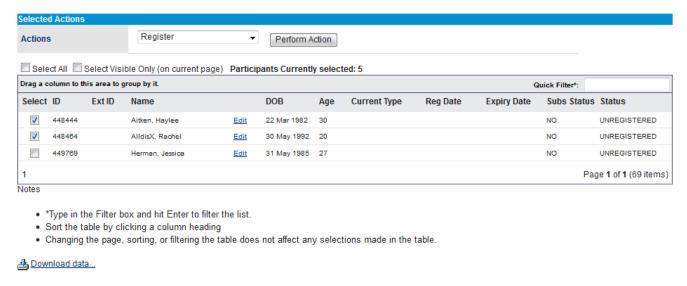
Register To : Football & Netball Geelong

Participants Selected: 2

Registration Type: Senior Assoc ▼

Register Participants

Viewing Account Statements

ℹ **Navigation**

Mode: Competition Management

Menu: Registrations -> Account Management

Account Summary

Actions	Generate Account Statements ▼	Perform Action		
			Search*:	
Select	Name	Last Activity	Last Amount	Balance
☐	Newtown & Chilwell	05/50/2012 09:50 AM	-$500.00	-$500.00
☐	Grovedale	24/10/2012 12:10 PM	$0.00	$140.00
☐	Bell Park	01/04/2012 02:04 PM	-$100.00	-$100.00
☐	Leopold	25/41/2012 02:41 PM	$30.00	$30.00
☐	Anglesea	25/21/2012 02:21 PM	$30.00	$510.00
☐	Barwon Heads	05/49/2012 12:49 PM	-$100.00	-$161.01

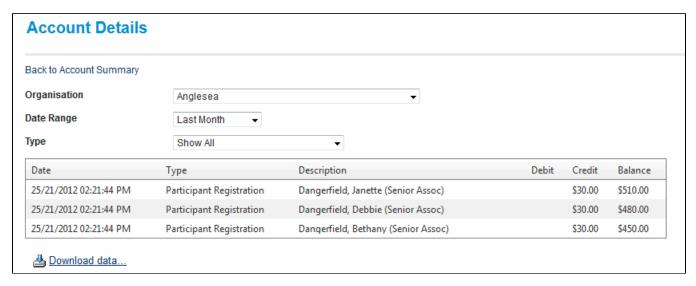1   Page **1** of **1** (6

- 🖶 Download data...

To generate the Account Summary as a PDF file select the option from the **Actions** menu then press **Perform Action.**

To open the account details page for a child organisation click the corresponding **View** link:

Account Details

Back to Account Summary

Organisation	Anglesea ▼
Date Range	Last Month ▼
Type	Show All ▼

Date	Type	Description	Debit	Credit	Balance
25/21/2012 02:21:44 PM	Participant Registration	Dangerfield, Janette (Senior Assoc)		$30.00	$510.00
25/21/2012 02:21:44 PM	Participant Registration	Dangerfield, Debbie (Senior Assoc)		$30.00	$480.00
25/21/2012 02:21:44 PM	Participant Registration	Dangerfield, Bethany (Senior Assoc)		$30.00	$450.00

📥 Download data...

To extract the data to Microsoft Excel 2007, Microsoft Excel 2003, Tab separated values (TSV) or Comma separated values (CSV) formats click the **Download data** link.

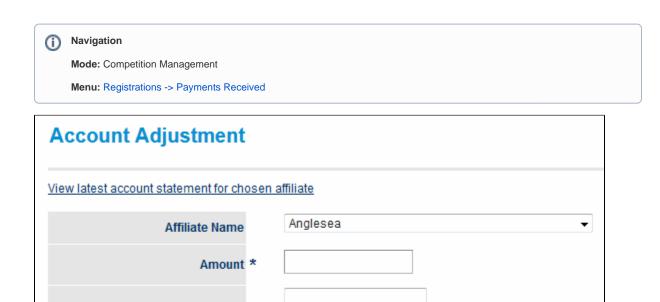The following tables indicate the data fields included in the **Download data** extract.

Summary View

Field	Description
entity_id	The ID of the entity that initiated the download
cp_entity_id	The ID of the child organisation
last_trans_id	The ID of the most recent transaction of the child organisation
curr_balance	The current balance of the child organisation's account
last_amount	The amount of the most recent transaction
transaction_date	The date the most recent transaction was recorded
entity_name	The name of the child organisation

Detail View

Field	Description
TransID	The ID of each transaction
Date	The date of each transaction
Type	The type of each transaction
Description	A description of each transaction
Debit	The amount debited from the account balance by each transaction
Credit	The amount credited to the account by each transaction
Balance	The balance of the account after each transaction

Adjusting Accounts

ⓘ

Account Adjustment

View latest account statement for chosen affiliate

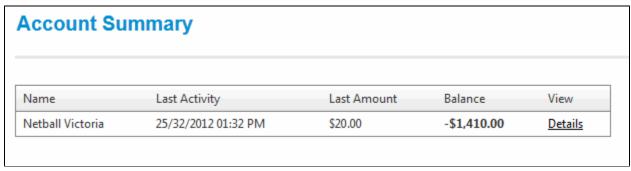|	
Affiliate Name	Anglesea ▼
Amount *	
Journal	

Submit

To adjust the account of a child organisation select it from the Affiliate Name list, enter the amount to be adjusted (positive values will be deducted from the account balance, negative vales will be added to it) from the account and a brief note in the journal section then click **Submit.**

Check Statement to State Body

Account Summary

Name	Last Activity	Last Amount	Balance	View
Netball Victoria	25/32/2012 01:32 PM	$20.00	-$1,410.00	Details

To view a detailed transaction list click on the corresponding **View** link:

Account Details

Back to Account Summary

Organisation	Netball Victoria ▼
Date Range	Last Month ▼
Type	Show All ▼

Date	Type	Description	Debit	Credit	Balance
25/32/2012 01:32:44 PM	Participant Registration - Reversal	Burney, Jessie (Senior Assoc)		$20.00	-$1,410.00
25/32/2012 01:32:44 PM	Participant Registration - Reversal	Brialey, Madel (Senior Assoc)		$20.00	-$1,430.00
25/32/2012 01:32:44 PM	Participant Registration - Reversal	Brasier, Kate (Senior Assoc)		$20.00	-$1,450.00
25/32/2012 01:32:44 PM	Participant Registration - Reversal	Bennett, Madi (Senior Assoc)		$20.00	-$1,470.00

📥 Download data...

To extract the data to Microsoft Excel 2007, Microsoft Excel 2003, Tab separated values (TSV) or Comma separated values (CSV) formats click the **Download data** link.

The following tables indicate the data fields included in the **Download data** extract.

Summary View

Field	Description
entity_id	The ID of the entity that initiated the download
cp_entity_id	The ID of the child organisation
last_trans_id	The ID of the most recent transaction of the child organisation
curr_balance	The current balance of the child organisation's account
last_amount	The amount of the most recent transaction
transaction_date	The date the most recent transaction was recorded
entity_name	The name of the child organisation

Detail View

Field	Description
TransID	The ID of each transaction
Date	The date of each transaction
Type	The type of each transaction
Description	A description of each transaction
Debit	The amount debited from the account balance by each transaction
Credit	The amount credited to the account by each transaction
Balance	The balance of the account after each transaction

Additional support is available via the **Help on this topic** links found in the top left hand corner of most pages. Further support is provided if you **contact support**.