Participant Management [User Guide]

Participant Management

Player List

Provides a list of all of the players within an organisation. The search can be refined by role and specific names or player id's, date of birth (date range) and gender. The search can also be extended to include players within affiliate organisations

> (i) **MODE:** Competition Participation / Competition Management   **MENU:** People -> Person List

Person Filters

Filters can be set up to help break the people in your database down into smaller groups. There are two types of filter available.

> (i) **MODE:** Competition Participation / Competition Management   **MENU:** People -> Person Filter

Dynamic: This filter takes user entered criteria and applies it to the entire person database. These filters are useful for generating lists broken down by age group, gender or user role.

Static: A static filter is a set list of names created by users and is best used for compiling mailing lists.

Person Filter Maintenance

? Help on this topic

▶ Back to Person Filter Management

Squad for

Name:	
Description:	
Filter Type:	◉ Dynamic ○ Static

Role

ANY ROLE ▼

Sub Role

◉ ANY Sub Role

○ SELECT Sub Roles...

Hide Advanced Search Criteria ▲

Person Name or ID		Name contains text ▼
Date of birth range*	From [ ] (dd/mm/yyyy) **To** [ ] (dd/mm/yyyy) Leave one or both boxes blank for a 'wildcard'. eg: From 1/1/1990 To <blank> means players with a DOB from 1/1/1990 onwards	
Gender*	☐ Male ☐ Female (de-select both check boxes to ignore gender)	
Organisation	◉ Include records within the current organisation Football & Netball Geelong ○ Include records within the selected organisation: [▼] ☐ Also include records from child organisations of the selected organisation	

Note: Where data has not been entered for a person for items marked with *, and no selections are made for these items, they are ignored in the search.

[Preview]

[Save]

Custom Person Fields

These are user created data fields that enable associations to enter information against their participants that the standard database does not allow for. Access to edit custom fields can be enabled for both participants and administrators of child organisations or restricted to the association that created it.

ⓘ **MODE:** Competition Participation / Competition Management   **MENU:** People -> Person Filter

Custom Person Field Management

☑ **Help on this topic**

▶ Add New Custom Field

Field Details	Field Type	Display Options	Child Orgs	Apply to Role/Sub-Role	Active	Sort Order	
Name: ⬚ **Description** ⬚	**Type** [Text Box ▼] **Options** ⬚	☐ Prohibit editing by child admin user ☐ Prohibit editing by logged in participants	☐	**Role** [Select... ▼] OR **Sub-Role** [Select... ▼]	☑	0	Update Cancel
Name test custom field **Description** test custom field - no role or any role	**Type** Text Box		N	ANY	Y	1	Edit

Data collected in custom fields can be done so in different ways using the following types.

Type	Description
Text Box	Provides space for a small amount of text
Drop Down List	Provides a drop down list. One item may be selected
Radio Button List	Provides a list of Radio buttons. One item may be selected
Check Box List	Provides a list of check boxes. Many items can be selected
Date Entry	Provides a box in which a valid date must be entered (DD/MM/YYYY)
Email Entry	Provides a space for an email address to be entered (email must be valid: youremail@domain.com)
Long Descriptions	Provides a large text box for a large amount of text.

Edit Person Record

ⓘ **MODE:** Competition Participation / Competition Management **MENU:** People -> Person List... Double click on the record you want to edit

This page gives access to all of a player's information. The general tab provides access to a players basic information and additional tabs provide access to role specific details.

Adding a person record

> (i) **MODE:** Competition Participation / Competition Management   **MENU:** People ->Add a New person

To create a new record enter the persons names into the boxes provided. The system will perform a duplicate check and if a similar player exists offer up suggestions for who it might be.

If the player does not already exist in the database click the link to create the new record. Fill in the player's information and click add to save.

Add New Person

General

■ **Personal Details**

One or more parent organisations have set fields as mandatory for registration purposes.
You will not be able to register the player to that organisation unless these fields are entered.

Football & Netball Geelong	First Name, Last Name, Address1, Suburb, Postcode, Date of Birth, Mobile Phone, Email Address

Role *	**Role** PLAYER ▼	**Sub Role** ☑ SENIOR ☐ JUNIOR ☐ VETERAN
Title	Select... ▼	
First Name *	Simone	
Middle Name / Initial		
Last Name *	Steele	
Alternate Last Name/Maiden Name		
Date of Birth *		(dd/mm/yyyy)
Country of Birth		
Gender	○ Male ◉ Female	
Email		Note: separate multiple email addresses with a semi-colon (;)
Address1		
Address2		
Address3		
Suburb/Town		
Alternate Last Name/Maiden Name		
Date of Birth *		(dd/mm/yyyy)
Country of Birth		
Gender	○ Male ◉ Female	
Email		Note: separate multiple email addresses with a semi-colon (;)
Address1		
Address2		
Address3		
Suburb/Town		
Postcode		
State/Territory	Select... ▼	
Country	AUSTRALIA	
Home Phone		
Company/Business Name P		
Comment (Only displays on this page) P		

*Denotes a mandatory field. This can be dependent based on the person's roles.

PDenotes field that is private to this organisation. All other fields are common to any other organisation the record is associated with.

Bulk import

ⓘ **MODE:** Competition Participation / Competition Management   **MENU:** People -> Bulk Person Import

Select the role and sub role that will be applied to all of the players being uploaded.

Bulk Person Import and Update

❓ Help on this topic

1. Role/Sub role

Select a role and a sub-role. This will be applied to new records only, existing records will not have their roles changed.
If the Custom Fields option is selected below the roles selection also affects which Custom fields are available.

Role	Sub Role	Role currency
PLAYER ▼	☑ SENIOR ☐ JUNIOR ☐ VETERAN	⦿ Import records with current roles. *You must select one or more sub roles* (use for current records). ○ Import records with no roles. *Select one sub role only*, which will be set as the "Last Role" (use for historical records e.g. uploading past players).

2. Import Options

Choose the options to apply to the import.

⦿ Replace data for existing records only where new data is provided
○ Replace ALL data for existing records

☐ Import Custom Fields

Download the template file and populate the columns with the players data.

⚠ **Important:**

Do not change the order of or remove any of the default fields from the upload template file. If you do not have data for these fields leave them blank.

Before uploading any data make sure that you are administering the right entity.

Players can be uploaded in batches of 50 if there are more players to load they will need to be entered into separate sheets.

Save your file and use the browse button to select it from your file manager.

Enter the worksheet that data is to be imported from and click Upload to load the players.

Duplicates Report

ⓘ **MODE:** Competition Participation / Competition Management   **MENU:** People -> Duplicates Report

This report looks at players within the currently administered organisation. It can compare them to either its own records (search for duplicates within the entity) or the national database (search for duplicates outside the entity. It is most effective when run by an organisation that has a large number of players in its own database.

Person Merge

ⓘ **MODE:** Competition Participation / Competition Management   **MENU:** People -> Person Merge Request

If you have one player that has multiple IDs the id's can be merged by submitting a person merge request.

Enter the two IDs that you want to merge and use the look up button to confirm they are correct. Submit the merge when you are sure that both records belong to the same person

⚠

> ⚠ **Important:**
>
> The merge process assumes that the ID in the TO field has the most up to date information. Any information on this record will be kept in preference over information in the from record.
>
> Once two records have been merged it is impossible to separate them. If you are unsure at all about whether or not records should be merged please contact the relevant organisation and / or InteractSport support.

Person Merge Request

? Help on this topic

Please read the Help section before scheduling merges. Incorrect merges can result in loss of personal and match data.

Please ensure that the To Person ID is the record with the most up to date personal information, as this is the information that will be retained. Match information and roles are kept from both records.

▶ View existing merge requests

From Person Record

Person ID: [   ]

To Person Record

Person ID: [   ]   [Look up]

Role Management

> ⓘ **MODE:** Competition Participation / Competition Management   **MENU:** People -> Reconfirm / Change person roles

From season to season as players age and develop it is likely that their role or sub role may need to change. This action can be performed in bulk via the reconfirm / change person roles page.

Because player records cannot be deleted (this would delete historical data relating to matches that players had played in) participants that are no longer involved with a club or association should have their roles removed.

Reconfirm / Change Person Roles

? Help on this topic

1. Click one of the *Display* links in the Role summary to display records in the Person List.

Role summary:

Role	Sub-role	Total		Requires reconfirmation
PLAYER	SENIOR	5	Display All ✔	0
PLAYER	JUNIOR	2	Display All	0
UMPIRE	SENIOR	2	Display All	0
UMPIRE	JUNIOR	22	Display All	0
OFFICE BEARER	PRESIDENT	1	Display All	0
OFFICE BEARER	OTHER	1	Display All	0
NO ROLE		699	Display All	0

2. (Optionally) Bulk Select Records:

○ Select all

○ Select records where DOB [on or before ▼] [01/01/1970] 🗓

☐ Include records with no DOB

[Select]

3. Select Action:

○ Re-confirm selected records with current Role/Sub-role (where applicable)

○ Change Sub-role of selected records to: [Select... ▼]

○ Add Role/Sub-role to selected records of: [Select... ▼]

○ Remove current Role/Sub-role from selected records

4. Commit changes

[Commit Changes]

Person List

Displaying *all records* for:
Role: PLAYER Sub-role: SENIOR
5 records. Number selected: 0

Items in Red require reconfirmation before the Remove date.

Search*: [   ]

ID	Name	DOB	Remove date	Select
906952	Bushby, Alana	Oct 19 1992		☐
945581	Cunningham, Helen	Sep 15 1968		☐
449944	Jenner, Grace	Sep 29 1993		☐
1108658	Maher, Luke	Feb 16 1976		☐
445377	Mckay, Bernie	Aug 22 1953		☐

1   Page **1** of **1** (5 items)

Notes

- *Type in the Search 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.

Deceased Participants

This function is available via the link at the bottom of the Person Edit screen (for the Principal user only). When a record is marked as deceased, the following changes are made:

- All roles are removed from the record, in all organisations

- The record is removed from all player filters and squads

- The email address and mobile number are removed

- Any participant login is deleted

- Roles will not be able to be added to the record

- The record will be available for editing via the 'NO ROLES' filter, but it will be removed from communication (email/SMS) lists

- An audit record will be created

If a participant is mistakenly marked as deceased, they can only be reinstated via a support request to InteractSport. If the person has roles in other organisations you will not be able to mark that person's record as deceased, in this case please lodge a support request.

Participant Logins

ⓘ **MODE:** Competition Participation / Competition Management   **MENU:** People -> Reconfirm / Participant Logins

In general, any participant with a valid email address entered in their person record can login to:

- Edit their own details
- Change their password
- View a list of organisations that their record is associated with, and in certain cases (namely where the person holds NO ROLE at an organisation), to remove the ability for that organisation to edit their record.
- Sign up and/or purchase items or memberships as configured by parent organisations.

Where a particpant holds either a PLAYER or UMPIRE Role at an organisation, they can also 'select' that organisation and access extra information /features.

A participant must have a valid email address entered on their record before a login can be created for them. A participant can also create their own login by clicking the appropriate link on the Login page and entering their numerical ID (provided their email address has already been entered).

Managing logins

Screen Overview

Participant Searching and Filtering

The list of participants within your organisation is displayed on the Participant Login Management screen. For those organisations that have more than a few hundred participants it is advisable to use the Person Filter options. You have the ability to filter by the following criteria:

- Person Role and Subrole (ie PLAYER, UMPIRE, TEAM OFFICIAL)
- Person Name or part name
- Account Status (See below for an explanation of possible account status values)

To Execute the search press the "Search Persons" button.
The list is limited to displaying the first 5000 records only. If more than that exist you will need to enter other search criteria to reduce the size of the list.
At the top right hand corner of the results list you can type in any value in the Quick Filter box to further filter the displayed records. The Quick Filter works on all displayed fields (ie ID, Name, Email Address, Current Roles etc)
When you first display the screen all participants records are displayed (ie no filters are applied) up to 5000 records (see above)

Account Status

The participant login account can have the following status's

NO_ACCOUNT - No account exists for this participant (an account can be created)
INVALID_EMAIL - No account exists for this participant but their email address is missing or invalid (no account can be created until this is rectified)
ACTIVE - Participant has an account which is active
LOCKED - Participant has an account which is locked (perhaps they have entered the wrong password too many times)
DELETED - Participant has an account which has been marked Deleted

Participant List

After the search is performed results are displayed in the results table with the following columns:

Select: This is a checkbox for each record to indicate you want to select this record

ID: The internal ID of the participant

Edit: A link to edit the participant details

Email: The email address for the participant

Last Logon: If the participant has logged on then this is the date of their last logon, otherwise this will be blank

Current Roles: Commas separated list of roles the participant has in this organisation

Status: The current Status for the participant login account (see description of possible Status's above

Valid Actions: A list of valid actions that can be performed against this login account. If you choose an action that is not valid the action will not be performed for this participant

Where a login already exists for the person concerned, that row will have a light green background otherwise the will be no background. Where a login account has been locked or deleted the text will be displayed as orange or red.

Performing Bulk Actions
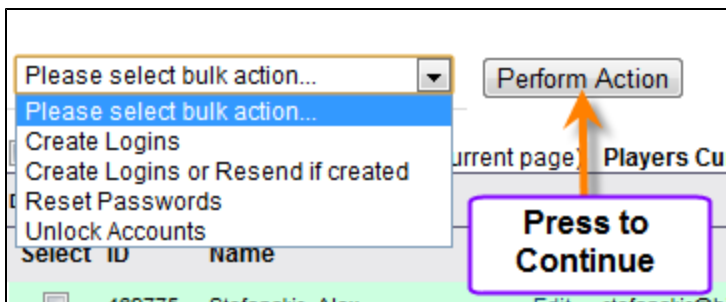
To perform any number of actions in bulk for one or more than one participants:

- Select which participants you would like the action to apply to. This can be done one by one via checking the checkboxes or clicking the "Select All" or "Select Visible Only" checkboxes an the top left hand corner of the results table. Select All will select all those participants in the result list across all pages. Select Visible Only will only select those participants visible on the first page of the results list
- Select the required Bulk Action from the bulk action dropdown list (explanation of actions below)
- Click on the Person Action button

If the chosen bulk action is not applicable for a participant then nothing is done.

The following bulk actions are available:

Create Logins - A login account is created for the participant and an email)the welcome email) containing their details is emailed to the participant.

Create Logins or Resend if created - As above but if the participant already has a login account the "welcome email" is resent

Reset Passwords - This will change the password to a random password, unlock a locked account, and send a password reset email to the participant.

Unlock Accounts - Unlock the account for a participant. The login will lock after a certain number of consecutive unsuccessful login attempts

Player Transfers

ⓘ

In this instance a transfer refers to copying a players record from one organisation to another. The player will remain in the originating organisations database and their role will need to be removed manually if the player is no longer with that organisation.

To transfer a player, use the search box to find them and click the add to link to the right of the players name.

Transfer Person

? Help on this topic

▶ Back to Search

Participant Details

Name	Amanda Apple (ID: 0860391)
Year of Birth	1970

Current roles

No records found

Person is inactive (ie no roles) in these organisations:

Org ID	Org
39605	Waverley Night Netball Association Inc.

Transfer this person to:	⦿ Current organisation: Football & Netball Geelong ○ Child organisation: [▼]
Role:	PLAYER ▼
Sub Role(s):	☐ SENIOR ☐ JUNIOR ☐ VETERAN
	[Transfer]

Important information about Transfers/Adding a person to your list

- As a privacy measure, after transferring someone, the record will not be editable by your organisation for a period of 5 days. Additionally, all personal data will be obscured during this time. However the record can be used, e.g. a player can immediately be selected for matches.
- An email will be sent to the person advising of the transfer to ensure that he/she is aware of the transfer, and to provide for an opportunity to reverse the process.
- Emails will also be sent to other organisations where the person has a current role.
- An audit record will also be created within the system detailing the user that initiated the transfer.
- Where a parent organisation transfers the record into their own organisation (e.g. a player playing in representative sides), notification emails are not sent, and the parent organisation can edit/view the person record immediately.

Player clearances

Player clearances is a mechanism whereby clubs gain approval from their governing body to transfer a player from one club to another. Throughout the process, the affected clubs and the association are notified by email as to the actions that are required at any stage.

Note: **Permits** have a similar process to that described below for Clearances, except the application is between one club and the association. A player must be on a club's player list before a Permit can be requested.

More information about Permits

Below is an overview of the clearance process.

Clearance Process

Club (destination club) applies
for a player clearance

↓

The player's current club (also referred to as the 'from' or 'ex' club)
must grant or deny the request

↓

The relevant association must grant or deny
the clearance request

↓

Once clearance is granted the
player is automatically transferred
to the destination club

(this means that the player then appears on the active player list of the destination club)