

## PERSON RECORDS

Entering registration details on individuals is a central component of the system. You can register Association, Club and Team players and officials within your person database so that you can assign those registered persons roles within their appropriate Association, Club and or Team.

This registration process allows for the creation of Committee/Executive/Staff/Board/Contact lists, the assigning of officials and players to Teams to create Team lists, Player pages and Officials information sections and most importantly the creation of a centralised person database that all Team, Club and Association administrators (with the appropriate access permissions) can access via the Internet to keep up to date records of those person's involved with the Association and it's Clubs/Teams.

### Maintain Roles

Before adding anyone to your person database it is necessary to first set up the person roles that you would like to capture data for; examples of roles include Player, Coach, Assistant Coach, Manager, Umpire/Referee and Medic.

To set person roles, from the Association home page:

1. Select 'Administration'. The *Administration Functions* page is displayed.
2. Select 'Maintain Roles'. The *Maintain Roles* page is displayed.
3. Click on the 'Add Role' link.
4. Enter the 'Role Title' of the role that will appear on the site.
5. Enter the 'SeqNo' (sequence number) to control the order in which the roles will be displayed on the site.
6. Select whether the role comes under Player, Official or Committee, e.g. for a role of 'Coach' you would select the 'Is Official' check box and for the role of Treasurer you would select the 'Is Committee' check box. As a general rule if the role can be assigned to a Team then that role comes under 'Is Official'.
7. Select whether the role requires accreditation
8. Enter a fee associated with the role, e.g. a role of 'Player' may have a registration fee of \$15.00.
9. Click the 'Update' button.

## Maintain Age Groups

Before adding any player to your person database if you would like to nominate the Age Group of that player in their registration record it is necessary to first set up the age groups that you would like to capture data for; examples of age groups include Juniors and Seniors, or Under 8 and Under 9's.

### Note

It is not compulsory to include any age groups in order to register a player within your person database.

To set age groups, from the Association home page:

1. Select 'Administration'. The *Administration Functions* page is displayed.
2. Select 'Maintain Age Groups'. The *Maintain Age Group* page is displayed.
3. Click on the 'Add Age Group' link.
4. Enter the 'Description' of the age group that will appear on the site.
5. Enter the 'SeqNo' (sequence number) to control the order in which the age groups will be displayed on the site.
6. Enter the 'Min. (Minimum) Age' and the 'Max. (Maximum) Age' for the age group.
7. Enter a fee associated with the age group, e.g. an age group of 'Junior' may have a registration fee of \$15.00.
8. Click the 'Update' button.

Once you have set up your Association Roles, and if applicable Age Groups, you are now ready to enter person registration records to your database.

## Add Person

From the Association home page:

1. Click on the 'Registration' link. The *Maintain Registration* page is displayed. Note that you can search for individuals already in the database for the current year using Grade, Club, Role, Division and Last Name as search criteria.
2. Click on the 'Add Person' link. The *Add Registration* page is displayed.
3. Complete the details for the person. Then click the 'Update' button. The *Maintain Registration* page is displayed.

### Note

An explanation of some of the fields within the *Add Registration* form are:

- **Phone Consent/Email Consent** – means consent to show that person's phone numbers/email address with their name on a Committee/Executive/Board/Staff/Contact listing.
- If you have entered Age Groups into the 'Maintain Age Groups' function you will see a drop down of the Age Groups next to the field '**Age Group**' for you to choose from when registering a person.
- If you have entered a draw into your Association site you will see a drop down next to the field '**Grade**' from which you can choose from when registering a person.
- **Homepage** – if checked this field allows for a player to have their own home page in which a Player Profile can be added.
- If any of the roles entered into the 'Maintain Roles' section have the 'Accredited' box checked then a **Details** section appears on the registration form so that the accreditation details of the person's role can be entered.
- **Other Duties: Description** – if a role of 'Other' has been entered into the 'Maintain Roles' section then this field will display and you can enter a description of what these duties entail, e.g. Canteen Supervisor.

## UPLOAD PERSON DETAILS

You can create a data file of persons for your Association and each Club (in an Excel spreadsheet, for instance) and upload it to the system.

To upload, from the Association home page:

1. Click the 'Registration' link. The *Maintain Registration* page is displayed.
2. Click the 'Upload' link. The *Maintain Upload* page is displayed.
3. Click on the Browse button. The 'Choose file' dialog box is displayed.
4. Locate the file to upload to the database and click the 'Open' button. The *Maintain Upload* page is displayed with the file location specified in the 'File to Upload' field.
5. Select the 'Validate Only' checkbox to show only the changes you will make when completing the upload.
6. Deselect the 'Validate Only' checkbox to update the system.
7. Click the 'Press to Upload' button. The *Upload Players* page is displayed with the player information.

### Note

The easiest way to establish the format for the upload file is as follows:

1. Enter the details for one person for a Club via the 'Add Person' screen.
2. Download the record for the Association – see '**DOWNLOAD PERSON DETAILS**' – into a Microsoft Excel spreadsheet. The title of each piece of data that can be entered for each individual will be listed across the top of the Excel spreadsheet.
3. Use the Excel spreadsheet to enter the details of additional persons whilst offline (off the Internet).

## ERROR INDICATORS

Invalid or error records are shown with grey as the background colour to the table row meaning that some data does not match, the format is incorrect or the system Year, Club or Grade does not exist.

Any data that was changed is shown with green as the background colour to the table row and the previous data that is being replaced is shown in brackets [ ] .

## DOWNLOAD PERSON DETAILS

You can also download a data file of all Players for a specific year. It is easier to download the Player database and add new people to the Association/Club records than it is to individually add each person via the 'Add Person' function. After you have made the required changes to the file, upload it to the system as specified in the **UPLOAD PERSON DETAILS** section of this manual.

To download from the Association home page:

1. Click the 'Registration' link. The *Maintain Registration* page is displayed.
2. Click the 'Download' link. The *Download Players* page is displayed.
3. Click the 'Press to Download' link. This will open the "File Download" dialog box.
4. Select the 'Save this file to disk' option, and click the 'OK' button.
5. This will open the 'Save As' dialog box.

6. Select the location for saving the file and click the 'Save' button.
7. Once the download has finished, the message boxes will disappear.

**Note**

When you download the file containing the person records from the system it will have the system assigned ID (System ID) for each person already specified. If you add new records (for new people in a Club for instance) you must leave the SysID field (the third column in the spreadsheet) blank for the new records otherwise you may overwrite another person's record in the system by replacing their System ID number in the new person's record.

## Re-Registration

You can display the people that you registered on the system for the previous years and then re-register them for the current year.

### TO RE-REGISTER PERSONS

From the Association home page:

1. Click on the 'Registration' link. The *Maintain Registration* page is displayed.
2. Click on the 'Re-Registration' link. The *Maintain Re-Registration* page is displayed.
3. Select the criteria you wish to use for the search of records that already exist within previous years on the system. You can search on the criteria of Year, Grade, Club, Role, Division and Last name. Click on the 'Search' button. The system will return a list of names that match the search criteria and display these names on the *Maintain Re-Registration* page.
4. Check the 'Yes' box next to the name of each person to be re-registered.
5. Then click the 'Register Now' button.

#### Note

The Re-Registration function can ease the workload on the administrator by allowing the search to proceed on very specific criteria - i.e. Just U14 Players from the previous year. This will allow the registration of all U15 Players for the current year in one operation.

## Search Database

For those administrators at the National, State and Regional levels of your sport you can search the person database across your entire organisation to identify persons who fulfil a number of criteria. Association and Club administrators have access to this function also but are limited to searching across your Association and/or Club site(s).

### SEARCH DATABASE

From the Association home page:

1. Click on the 'Registration' link. The *Maintain Registration* page is displayed.
2. Click on the 'Search database' link. The *Database Search* screen is displayed.
3. In the *Database Search* page, you can select the criteria to search on.

#### Note

- The **Sites to Search** option defaults to 'All Sites' unless specific sites are selected.
- The **Show Fields** option defaults to 'All Fields' unless specific fields are selected.

4. When you have identified all of the information that you want displayed for each search result, click the 'Download' button at the bottom of the page. This will open the "File Download" dialog box.
5. Select the 'Save this file to disk' option, and click the 'OK' button.
6. This will open the 'Save As' dialog box.
7. Select the location for saving the file and click the 'Save' button.
8. Once the download has finished, the message boxes will disappear.
9. Open the search results file using Microsoft Excel.

## Committee/Executive

You may wish to publish your Association personnel as an easy way of contacting people (i.e. Secretary, Treasurer, Registrar etc). A person must be registered within the Association before allocating them to an executive/personnel position.

To register a person, from the Association home page:

1. Click the 'Registration' link. The *Maintain Registration* page is displayed.
2. Click on the 'Add Person' link. Fill in all the information that you wish. Tick the relevant boxes to indicate the availability status as a player, coach, umpire etc.

### Note

If you would like this person to be part of your Association Executive/ Committee/ Staff/ Board/ Contact list you **MUST** have a role set up in Maintain Roles of 'Committee' and you must select this role in the registration form for this person.

3. Then click the 'Update' button. You will return to the *Maintain Registration* page and the name should appear listed on this page. Repeat the process until all personnel are entered.
4. Once you have completed this step, click the 'Edit Personnel' link and you will be taken to the *Edit Personnel* page.

### Note

Naming conventions vary within the system; this link may be named 'Edit Executive' or 'Edit Committee' for example depending on the naming convention chosen by the administrator responsible for the site.

If you have already entered the names of the person's to be added to your Executive/ Committee/ Staff/ Board/ Contact list then you can select the 'Edit Executive' link from your Association home page, in the 'Administration' section of links.

5. From the 'Select Member' drop down at the top of the page select the person that you wish to assign to your Executive/ Committee/ Staff/ Board/ Contact list. Then click the 'Add Member' button. Repeat the 'Add Member' process until all personnel appear on the Personnel Table.

### Note

You may need to refresh your page after adding each member to see him or her appear in the Personnel Table.

An alternative process for adding each person to the Personnel Table is to enter his or her System ID number (seen after the Person's Name in the Select Member list) to the SysID column next to the appropriate Position Title.

6. Enter the persons' 'Position Title' and select the appropriate personnel boxes of:
  - C = Contact
  - M = Management
  - E = Executive
  - B = Board
  - S = Staff

### Note

If these list names do not suit your Association they can be changed, contact iSport by emailing [webmaster@isport.com.au](mailto:webmaster@isport.com.au)

7. Click the 'Validate' button to see your entries within the table for validation. If all changes have been made correctly click the 'Update' button to load the personnel to the system.