PÉTANQUE FEDERATION AUSTRALIA LTD

PFA Members Portal

User Manual Version 4.0

September 2018

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1 Introduction

The PFA Portal is an online database that contains information about member clubs and leagues, licenced players, umpires and coaches.

The Portal essentially replaces all the paper-based forms clubs have been using for the processes listed below and thus should make these processes more efficient.

The database is online but **is not public**. Access is restricted to member clubs and the PFA officials.

Logons are at five levels:
- Players
- Clubs
- Leagues,
- Managers and
- Admin.

Player access is not in use at the moment.

To reiterate, the Portal and the information contained therein is not public.

Clubs and Leagues can

- see and update contact information about their own members,
- request a player transfer,
- request a new player be licenced,
- export or printout a list of their members and umpires and coaches,
- send an email to their current licenced players, all Clubs, Umpires or Coaches
- print a licence card for their members,
- print all licences in bulk
- See all Club transactions – Invoices and Receipts
- download a player list for use in the SPORT competition software
- bulk pay their PFA affiliation fees and player licences at the beginning of the Financial year, and
- view contact details for other clubs, leagues, umpires and coaches

Admin and Managers can

- print out various more-detailed reports,
- email different subgroups within the organisation and
- accept new player requests and annual renewals of club affiliation fees and player licence fees
- maintain a register of club invoices and related payments
- manage other aspects of the database

The PFA Members Portal can be accessed at https://members.petanqueaustralia.org.au/ or using the button at the bottom of the PFA website homepage. A log-on and password are made available to each club and league affiliated with the PFA.

The most up to date version of these User Instructions is always available at http://www.petanquefederationaustralia.com/members-portal.

The database requires you to use the Chrome browser for correct performance. You can download the Chrome browser at https://www.google.com/chrome/.

Don't use tablets or smart phones for editing information.

Please read this whole document before using the Portal but particularly the section on loading photos as this is most important.

2 Log On

3 Club Log on

As mentioned, your Club's log on details have been supplied by Admin. Please ensure that preferably only one trusted Club official accesses your Club details. The password can be changed by Admin at any time upon request.

Cubs can only see and edit their own players' and club details. They can see contact details for other Leagues, Clubs, Umpires and Coaches,

(For this User Manual the Smythesdale Club's details are used with permission of the Club's officials and players.)

Any data created or modified is logged with that user's logon and date in order to maintain an audit trail and facilitate management of the Portal.

When you first log in the screen looks like the following.
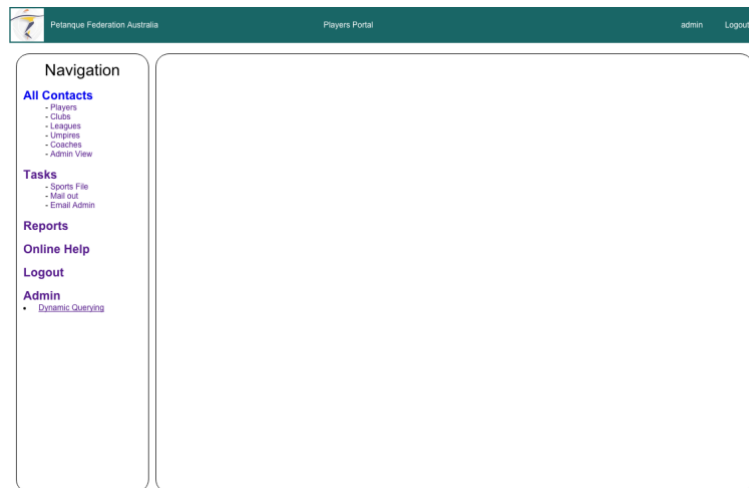
3.1 All contacts

3.1.1 Players

When you click on Players you will see a list of your club's past and present PFA-licenced players in alphabetical order by Surname. You may need to scroll through this list if you have more than 15 or so players. At the bottom of that list is the total number of players in your Club.

It is recognised that Clubs often have other categories of membership such a Social member. The PFA Portal is concerned only with **affiliated clubs** and **licenced players** at this stage.

Clubs can see their **archived and deceased** players as well as their **current** players using the **Status selection box** at the top of the list. Initially you'll see all players. There are four Status values; Current, Archived, Pending and Deceased. Each time you select one of these values, the list changes accordingly and the total at the bottom also updates.

This is to assist Clubs with registration processes. Any player who has been archived and subsequently re-joins as a Licenced player is treated differently from a New player request. See the later section on Request new player.

Clubs cannot change the Status of a player. They need to request any change. Status of Pending is created when a club registers a new player. This status is changed to Current by Admin once the Player has been accepted by PFA as a licenced member (usually a rubber stamp decision).

To get a more detailed list of your players see the Reports section below.

Click on a particular player and you see their details.

The Fields that you can complete or edit are: (You will have to scroll to see all the fields.)

- **Firstname**
- **Surname**
- **Gender**
  (Drop down options: Can be M, F or N/S for Not stated)

- **Licence Number**
  (This is not modifiable. Players that had a licence number before the introduction of the Portal keep their original number. New players have a Licence Number automatically allocated by the system.)
- **Street**
- **Town**
- **State**
  (Drop down box.)
- **Postcode**
- **Home phone**
  (Use the format 0x xxxx xxxx for consistency)
- **Mobile**
  (Use the format 04xx xxx xxx for consistency)
- **Email**
  (The little box under the email field allows you to send an email to that player.)
- **Club**
  (Not modifiable by Club. See Request Transfer later))
- **Photo/Logo**
  (See below for important information about the Photo field.) A photo must be added if the player wants to play in any PFA competitions.
- **Date of Birth**
  (This should be in dd/mm/yyyy format. If it isn't, check the settings of your browser. Not all Clubs will enter Date of Birth for privacy reasons but if a player is wanting to play in PFA affiliated tournaments this field will need to be added for verification purposes when registration on MyPetanque is done.)
- **Age**
  (Not modifiable – calculated by the Date of Birth field.)
- **Category**
  (Automatically calculated from the Date of Birth into Junior (<18 yo), Full or Over 60. This can be manually selected if the Date of Birth isn't known. It defaults to Full.)

Once you have added or modified the information in these fields make sure you click the **Save Changes** button otherwise all will be lost!

Whatever changes you are making, it's imperative that the State and Club fields be populated. Otherwise this entry will not appear in some reports or lists.

Photo field.

The photo field is used to print out a player's Licence Card and for identification at registration procedures at PFA competitions.

To add a photo of your player, click the "+" sign next to the entry box. The file must be of an image type – jpg, png, etc. Pdfs are not accepted.

This brings up the following screen.

Select **Choose file** and choose a file from your computer's file system. Then click on **Upload Now**. One more box comes up verifying that the file has been uploaded which you need to manually close. You won't see the picture until you **Save your changes**.

It's important that the photo you add is edited to be less than approximately 100 KB in size. This is to allow the overall database to be of a reasonable size. Most computers and phones have the capacity to save an image as a smaller version of itself. If you don't have the ability to change the size of the photo (smart phone photos are typically 3 or 4 Mb in size) send the photo to admin@petanqueaustralia.org.au and we will modify and load it.

Also, note that because the field that holds the photo is square, try to crop the photo to be as close to square as possible in order to avoid undue distortion on the screen and card.

If you click on the image it opens the original version of the image in another window. This one isn't distorted and can be used in other applications of the Portal yet to be developed.

At the bottom of the Player screen there are two boxes.

The **Notes** box allows you and Admin to keep Notes on players. For instance, when a player transfers to another club this can be noted.

The **Show Card** box allows you to Print out (or save as a PDF) that player's Licence Card. Clubs are now responsible for allocating Licence Cards to players. The card's details update automatically year on year so will need reprinting in June/July. Print the card on good quality photo paper or laminate it afterwards for best effect.

Note that you can print all current players' cards under Reports (See later).

The Portal system updates the year on the card from June 1st each year. This allows Clubs to renew during June ahead of the July changeover period and provide new cards to their members at that time.

Note that now the Portal is rolled out and as clubs are using the SPORTS software for competitions the need for a printed Licence Card has diminished.

3.1.2   Clubs

Under the Clubs menu item Clubs can see the contact details of all PFA affiliated clubs. (This information is also available on the PFA website of course.)

For your particular Club, you can add and modify the fields as per the Player details screen.

For the President and Secretary fields you need to select from the drop-down list of all Players in your State. (This is necessary as a few clubs have Club Officials who are licenced with another club!) Their contact details are automatically imported from the Players section of the portal.

If you want to add email or mobile details for your club's officials, that must be done by looking at the official's Player details screen first.

If your club officials are not PFA licenced players, please contact Admin and we will add them in as a special category.

Where you have an individual email for your club (as opposed to an official's personal email) add that in under email. If there is no entry here, the email of the Club secretary is used for communication.

You can add your club's website details and logo in the appropriate fields. Remember the issue about the size of the logo you load – keep it below 100 KB and try and make the image you load square.

Also, note that because the field that holds the logo is square your image might appear distorted. If you click on the image it opens the original version of the image. This one isn't distorted and can be used in other applications.

The Payment details field records your club's last bulk payment. It's not modifiable by your Club.

3.1.3   Leagues

This area operates the same as the Clubs menu item. You can see contact details for all Leagues.

If you are logged on as a League you can update your League's details (See later).

(League logons can see all players and clubs in their State – see later.)

3.1.4   Umpires and Coaches

You can see here the list of all currently endorsed Umpires and Coaches with their contact details and qualifications. (This information is also available on the PFA website.)

3.2 Tasks

3.2.1   Pay Registration

Note: Don't use this option until the June/July period as it adds data that is relevant to the changeover period. And only use it once!

In June/July each year Clubs are required to pay their PFA affiliation fee (currently $100) and Licence fees for their licenced players ($35 from 2018 or $10 for Juniors). The Portal now requires Clubs to do this online.

For clubs that have players joining throughout the year use the Request New Player option (See below).

Also, if you have a player who didn't renew at the correct time (June/July) but wants to renew later, use the Email admin option under Tasks. This is because if you use Request new player for this type of player you'll automatically get allocated a new player with a new licence number for that player which isn't a desired outcome as we want all players to be unique and to keep their licence numbers. You can see the old player under Archived to check if they are "in the system".

Before you complete the Pay registration process, get a list of your current players by doing a report under the Reports menu item. This will allow you have a record of which players were in the system before renewing their registration.

The screen that appears when you select Pay registration is as below.

Note that you might have to scroll down to see all your players. There will be a scroll bar on the RHS if needed. Put the curser into the area where the list is and scroll.

When you first open the screen the default is for all players to be selected.

Also, the details in the Summary section are left over from last year so don't worry if they don't add up at this stage.

Untick the players who aren't renewing. Make sure that you have a **tick against all the players who are renewing** their licences through your Club.

Then make sure you click on **Save Selection** just under the list on the left-hand side if you make any changes from the default selection. You need to do this even if you haven't made any changes.

If you don't do this, the selections chosen aren't acted on. In addition, you can't proceed until you do this.

Once you have chosen Save selection, double check that all the players you want to renew are ticked.

If a player is in the database as a Junior the Fee will adjust automatically.

Once you have clicked on the Save selection box the information on the right-hand side updates and the Process now box appears.

Those players who don't renew their Licence through this process will become archived in the system (Unless they are deceased, in which case Clubs should advise the PFA Portal Administrator). As archived, these players will no longer appear on that Club's list of current players.

And, as mentioned above, if that player subsequently wants to renew (after the bulk renewal procedure), the Club should advise the Portal through the Email admin menu item. Don't use Request new player (also as mentioned above as you get a double up).

Once you click on Save selection the Process Now button will appear. You can now click on that button to proceed.

Under payment options you can select one of the two options

The preferred Option is to request an Invoice. This will generate an Invoice and **send it to your Club email.** This will give you a record of the payment you need to make. Payment details are included on the Invoice.

Some email systems have been putting these Invoices into the Junk folder automatically, so if you don't get the Invoice check this.

If you choose the Pay by EFTPOS, you get the following message, which will give you the PFA bank account details.

Please pay the agreed fee to the PFA Bank account.
Smythesdale Petanque Club
Club-$100, Players-30 x 15 = $450, Junior-10 x 0 = $0 = Amount Due: $550.00

Please make payment to:
Bank: Commonwealth Bank
Name: Petanque Federation Australia
BSB: 063 143
Account No: 10405152

Note in the payment which club is paying.
A receipt will be sent to your Club email once payment is received.

Continue

Click on Continue to proceed back to the Main menu. And, of course, you should then make the payment. In the EFT process please make it clear which Club is paying.

Once you pay using either method you will receive a receipt.

As mentioned, if you aren't receiving Invoices and/or Receipts check your email's Junk folder as we are finding that some are being automatically sent there.

Use the **Pay Registration** process once only. Don't go back and try again or add a player and redo it. This is important.

So, in summary:

1. Click on **Pay Registration** in the menu (Only once per year)
2. **Unclick** those players that aren't renewing
3. Click on **Save Selection below that list**
4. Check that the **Summary** section is correct
5. Select the option of **Pay now** or ask for an **Invoice**
6. Click on **Process Now**
7. If you don't want to proceed at any time, Click on **Cancel Transaction**
8. Pay the fee as appropriate.
9. Only do this once per year.

3.2.2   Sports file

This was called player list in a previous version of the Portal. This was a bit confusing as some clubs interpreted this as meaning a list of their players.

The Sports file menu option allows clubs to download a particular file that is used in the SPORTS software.

It has just the information needed by this software in the specific format needed by it. (Sometimes called the player.csv file, however it's not actually a csv file as the delimiters used are semicolons and it has German headers, etc.) Users of the SPORTS Software will know how to load this file.

3.2.3   Mail out

This item allows you to send an email from your Club email address to various groups, the most important one being to your current players. Select the group in the drop-down box and then click on Get addresses.
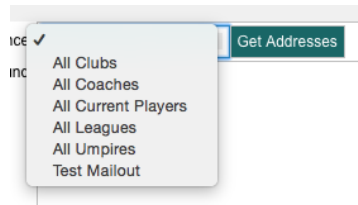
All Clubs is all Clubs in your State/League. This allows you to email all Clubs with tournament information, etc.

All Coaches and Umpires means just that.

All Current players means all players in your Club.

Once you select the group you'll see the emails in the box underneath. You have the option of selecting these and copying them and then pasting into your own email client. This has the advantage that the current Mail out functionality only allows plain text or HTML to be emailed. So, you can't add formatting or images to the email (not easily anyway). And you can't add attachments using the email system in the Portal at the moment. We hope this will be implemented in a future development of the Portal.

You type in the Subject and the Body of the email and then Click on Send Emails Now.

If you have a modicum of HTML knowledge you can add a line break for instance (<br>) into the text to make it more readable at the other end. Similarly, you can add links etc. into the body of the email. This site (https://www.w3schools.com/html/default.asp) gives you some HTML tags to use.

The Test mail out option in the drop-down list allows you to send an email to your own club email to test what things will look like.

Once you have sent the email, a small note appears at the bottom of the screen with a Continue link to allow you to return to the main screen. Alternatively, you can click on Exit Mailout manager box at the top.

3.2.4   Email admin

This screen is a convenient way to send a note to Admin if you have an issue. (You can, of course, still use your own email client.)

3.2.5   Request Transfer

This replaces the paper form of the same name.

Before requesting a player transfer make sure you are familiar with the PFA policy on this.

> *11. Transfer*
>
>> *a. A player wishing to transfer between Clubs shall apply through their current Club using the appropriate section on the PFA Members Portal.*
>> *b. The player must be the holder of a valid Player's Licence.*
>> *c. The request must have the endorsement of both the current club and proposed new club.*
>> *d. A Player can only transfer once in any given 12-month period*
>> *e. If the previous Club refuses to agree to a transfer request, the Club must advise Pétanque Federation Australia within 10 days of its decision and reason.*
>> *f. Within 10 days Pétanque Federation Australia will decide to accept the Club's decision or issue a new Licence to the player.*
>> *g. Notwithstanding the above, a Player can transfer Clubs at the end of the playing year (June 30th). See Section 5.*

This screen allows a club to request that a currently licenced player be transferred to another club. State the reasons in the Notes box. State also that both Clubs have endorsed the request.

The PFA will process this request and inform all involved accordingly. A new Licence Card can then be printed.

Note that it must be the Club from which the player is transferring that makes this request as the Player drop down box only lists that club's players. If the Club that the Player is transferring to wants to request the transfer and can't get the original Club to make the request through the Portal that Club can contact the Portal though the Email Admin function.

3.2.6   Request New Player

This replaces the paper form of the same name.

Note again that this process is only for use in requesting a new player registration. For players who had previously been licenced and are returning, use the Email Admin option to advise this. They will be in the system as Archived and can be made Current again and thus retain their old Licence number. You can use the Status selection box in your list of players to check whether a returning player is in the database as an archived player.

Clubs use the Request New Player screen to request a new player be licenced by the PFA. The fields are the same as with the Player details screen. Complete all the fields including indication of your agreement to the three sentences at the bottom of the screen. (As mentioned, this screen replaces the paper form used in the past and requests all the same information.)

Your Club is automatically selected for the Club field. Remember the rules about size of photo. Make the payment directly to the PFA account as indicated in the last box.

Then click on the **Submit for Approval** button. This adds a player as Pending into the system. Once the PFA has considered the request, including checking on the details added, the player's status will be changed to Current and their name will then appear in your club's list of licenced players.

You will also get an Invoice sent to you. Once the payment is received you will get a Receipt.

If you don't click your agreement to the three boxes at the bottom of the screen, your attempt will be rejected with a message as per the following and you'll have to do it all over again. These statements replicate the undertakings that were on the paper forms in the past.

You can print out a Licence Card for your new player once you have been advised that the player licence application has been approved.

3.3 Reports

The Reports menu item allows clubs to preview on screen, export as a csv file or print a list of their current players and their contact details. The Export option will download the file into the normal default download position used by your browser.

You can also print out a list of current Umpires and/or Coaches approved by the PFA.

This is also where you can print out all the Licence cards of your current players should you wish - 12 to an A4 page. Note that for this to work **use the Print button not the Preview button**. (The Preview button will be taken off soon.)

You can now see all your transactions with the PFA using the Club Transactions report.

Click on Exit reporting to get back to the main menu.

3.4 Online Help

This menu item takes you to a page that links to this Help file on the PFA's website.

3.5 Logout

Allows you to log out of the Portal. This is also possible at the top right hand side of the screen.

4 League log on

4.1 All contacts

State leagues can log on and see details of all their State's Clubs and Players.

The functionality of the various details screens is similar to the Club log on. Leagues can't edit the Player or Club details fields. This is the job for Clubs.

4.2 Tasks

4.2.1 Mail out

When logged on as a League, you can email All Clubs in your State and All Current Players in your State as well as the other options available to Clubs.

4.3 Reports

The various reports allow League officials to get lists of Players and Clubs from their State.

5 Manager log on

There are a number of Manager logons – Coach manager, Player manager, Secretary manager, Umpire manager.

This level of log on allows managers to see most of the functionality of the Admin log on but they can't add Players, Clubs, etc.

They are able to keep notes about Umpires and Coaches for the record.

As well they can print out an Umpire's Licence Card.

6 Admin Log on

The details of this are published elsewhere.

The role of the Admin level of log on is to
- approve new player requests,
- add new players and clubs on request,
- monitor the invoicing and receipting of payments,
- develop new functionality for the Portal.