



The Photographic Alliance of Great Britain

CENTRAL ENTRIES SYSTEM - USER MANUAL FEDERATION DATA MANAGERS

The 'CES' is the Alliance's Central Entries System although the system has been developed to include more functions.

This manual explains how to use the system for Federation Data Managers. Data Managers should also be familiar with the separate 'How Do I ?' manual chapters which cover accounts and general use by Club members, Club officers and Federation officers.

Having correct and up to date data for Clubs, Club members and Speaker Activities means knowing that all access to the PAGB system is from valid users, whether PAGB members or affiliates. That is the basis for developing effective delivery of a wider range of services.

CONTENTS

| | |
|--|---|
| Central entries system - USER MANUAL federation DATA MANAGERS..... | 1 |
| Version control..... | 2 |
| 1. Federation Data Managers..... | 3 |
| 1.1 Explaining Data Manager Approval Levels | 3 |
| 1.2 Adding a New Club..... | 3 |
| 1.3 A Club has left membership of the Federation..... | 3 |
| 1.4 A Club in the Federation has changed its name | 3 |
| 1.5. Two Clubs in the Federation have merged | 4 |
| 1.6 A Club is also a member of another Federation..... | 4 |
| 1.7 A Club does not meet the conditions for PAGB Affiliation | 4 |
| 1.8 There are duplicate records for one Club..... | 4 |
| 1.9 A Club claims it is not shown in the Club logon pick list..... | 4 |
| 1.10 A new Club member approval has been requested | 5 |
| 1.11 A new Club officer approval has been requested..... | 5 |
| 1.12 A Club officer needs a higher approval level..... | 5 |
| 1.13 A Club officer has ceased office | 5 |
| 1.14 A new Federation officer approval has been requested..... | 6 |
| 1.15 A Federation officer needs a higher approval level | 6 |
| 1.16 A Federation officer has ceased office..... | 6 |
| 1.17 A new Speaker Activity approval has been requested | 6 |
| 1.18 Approving a Speaker Activity by someone who is not a Club member..... | 6 |
| 1.19 Speaker Activities from an Adjacent Federation | 7 |

| | | |
|------|--|---|
| 1.20 | A Speaker Activity approval must be changed..... | 7 |
| 1.21 | Obtaining Reports | 7 |
| 1.22 | Making Regular Checks | 7 |
| 1.23 | Raising Issues..... | 8 |
| 1.24 | Correcting Errors During Bulk Load..... | 8 |
| 2. | Administrators | 8 |
| 2.1 | Explaining Administrator Levels..... | 8 |
| 2.2 | Administration Menu..... | 9 |

Version control

| Version | Date | Notes |
|---------|---------|--|
| Drafts | Feb-22 | Development |
| 0.0 | 4/3/22 | Draft after consultation and corrections |
| 1.0 | 19/3/22 | Pre-production release |
| 1.1 | 11/4/22 | Production release |
| 1.2 | 27/4/22 | Amendments |
| 1.3 | 22/5/22 | Update after post-demo changes |
| 1.4 | 24/5/22 | Forcing Club membership (in 1.10) |

1. Federation Data Managers

One or more Federation officers should have approval at one of the Data Manager levels, which adds more facilities above Federation Advanced level.

See **1.15** for how to appoint a Federation Data Manager.

Most actions specific to Data Managers take place within the Membership menu in the Federation section. The Federation menu options have a red background.

If the Data Manager is also a Club officer, there will be Club menu options with a green background. Club menu options use the approval level granted as a Club officer, and not the approval level as a Federation Data Manager.

1.1 Explaining Data Manager Approval Levels

There are two approval levels above Federation Advanced:

- Basic Data Manager. Add and edit Clubs; approve speaker activities; view log.
- Advanced Data Manager. As Basic Data Manager, plus edit user, delete user.

There are more levels above Data Manager, which are outlined in chapter 2.

1.2 Adding a New Club

Use the Memberships menu, Federation section, Member Clubs option.

Fill in the offered fields at the top of the list, and click 'Add New Club'. The Club is presumably Active so ensure the Active box is ticked.

Take care entering the Club name as changes later can cause confusion. Always state the Club name in full, with no abbreviations like 'CC' or 'PS'.

There are known situations where the same town name occurs in different Federations in different parts of the country. Example: Newcastle. As users of the Club logon have to pick their Club from a list, the Club name in such situations should be suffixed with the Federation code in brackets. Example Newcastle ... (MCPF) versus Newcastle ... (NCPF). The situation where one town has more than one Club is not usually a problem as the Clubs will differentiate themselves.

1.3 A Club has left membership of the Federation

Use the Memberships menu, Federation section, Member Clubs option.

In the Club record, untick Active so that the Club becomes Inactive. Never remove the name of a Club from its original record. Club records are never deleted.

An inactive Club will not appear in the pick list of Clubs, meaning that any existing Club member accounts are blocked and no new Club member accounts can be created. Records of Club members and their images are retained but the Club cannot view them. The Club also disappears from the 'Find A Club' map. Please also consult the PAGB system administrator(s) in case either the Club has an outstanding service or event entry, or a Club member has an outstanding APM application.

1.4 A Club in the Federation has changed its name

Do NOT make the Club inactive and create a new record with the new name because that separates off all the Club's members and images.

A Club name can be changed provided it remains the same operational entity. Also use this procedure of the Club's name has a spelling error.

A Club name cannot be changed via the Edits menu or the Memberships menu. The change needs to be discussed with a system manager at a level able to access the Administrations menu and Manage Clubs. Any name change must follow the format requirements in **1.2**.

1.5 Two Clubs in the Federation have merged

Whatever you decide, one Club's members and image records are going to be left behind. Could it be that one Club has closed, with the members joining the other, in which case, use the procedure in **1.3** to make the closing Club Inactive. Use the procedure in **1.4** to change the ongoing Club's name if required.

As image records are linked to the individual account, a member moving from one Club to another can still see all their images from any Club.

1.6 A Club is also a member of another Federation

This can happen when a Club is near a boundary and would like to take part in events within two Federations. However, this is a PAGB system. A Club can only be affiliated to the PAGB through one Federation, and can only enter PAGB events and receive services as a member of one Federation. Which Federation is the one for affiliation must be understood and agreed between the Club and both Federations. To keep Club records complete, both Federations should have a record for the Club and these will be separate records. The affiliation Federation ticks its record to make the Club Active. The other Federation unticks its record to make the Club Inactive. The Club will appear only once in the logon pick list and the 'Find a Club' map, and that will be for the correct Federation.

1.7 A Club does not meet the conditions for PAGB Affiliation

Federations can enrol any Club as a member under their own conditions. Some Federations have conditions which allow membership by Clubs which do not meet the PAGB requirements for affiliation. For completeness, the Data Manager should create a Club record, but must untick the record to make the Club Inactive. The Club will not appear in the pick list for Club account logon or in the 'Find a Club' map. The Club cannot enter PAGB events or receive PAGB services.

1.8 There are duplicate records for one Club

Ideally this should not happen but it has from time to time. Decide which record to keep in use and tick the record to make the Club Active. For any other record, follow the procedure in **1.3** to make the Club Inactive. It would help to follow the procedure in **1.4** to suffix the Club name in the inactive record(s) to add '(Do not Use)' as a reminder to yourself and the system administrators. Any member and image records linked to the inactive Club record(s) are retained but cannot be viewed via the Inactive Club.

1.9 A Club claims it is not shown in the Club logon pick list

The pick list includes all Clubs declared Active by their Federations. This scenario is either an omission (see **1.2** to resolve), or the Club is not eligible for PAGB affiliation (see **1.7**), or the Club is not a member of any Federation.

1.10 A new Club member approval has been requested

Club member approval is required if the name does not already exist in the Club. Ideally, a Club would be able to approve its own members from direct knowledge, but the request may be escalated to the Federation. Either check the Club's website or contact the Club using the Federation's records to check whether the Club member approval is appropriate. If it is, tick to make the member active. If it is not, delete the member name in the Club list.

There may also be situations where a member of one Club needs to be added as a member of another Club. For example, entries are being made to a competition/event and the image by a photographer would be assigned to the wrong Club unless action is taken. In this case, and provided the Data Manager is satisfied that the requirement is genuine, the Data Manager should use the Membership menu > Federation submenu > Member Clubs item. Pick the existing Club for the photographer. In the Club record, use View Members. In the members list, click on the member's name to show their details. Use the '+Club Membership' option and pick the required new Club. This will add an approved Club membership to that account.

1.11 A new Club officer approval has been requested

Ideally an existing Club officer should be able to confirm a new officer from direct knowledge, but the request may be escalated to the Federation.

A new Club officer approval request has permission level 'Unapproved' meaning it cannot be used yet. The Federation Data Manager needs to be satisfied that the person requesting the account is authorised by the Club. This can be checked eg, from the Federation handbook, from the Club's return to the Federation or from the Club's website. Failing that, the Club Secretary may have to be contacted to confirm.

To confirm the request, change the approval level in the Club officer record to 'Limited' (sufficient for access to most services), 'Normal' or 'Advanced' as appropriate.

To refuse the request, delete the record in the Club officer list.

1.12 A Club officer needs a higher approval level

If there is a Club officer at a high enough approval level, then that Club officer can raise the approval level of the requesting officer. Otherwise, the Data Manager can edit the account record.

At least one Club officer should have Advanced level approval as that is needed to edit the meeting postcode and website address.. The aim is that Clubs can manage their own data effectively.

1.13 A Club officer has ceased office

Ideally another Club officer can delete accounts for those leaving office, but the request maybe escalated to the Federation.

There may be reasons to delay if the account holder has ordered a PAGB service or has entered a PAGB event for the Club, and the service or the event results have not yet been delivered.

A Club officer may be deleted using the delete button.

1.14 A new Federation officer approval has been requested

A new Federation officer approval request has permission level 'Not Approved' meaning it cannot be used yet. The Federation Data Manager will know directly whether the request is valid.

To confirm the request, change the approval to 'Basic', 'Standard', 'Advanced' or a Data Manager level.

To refuse the request, delete the record in the Federation officer list.

1.15 A Federation officer needs a higher approval level

If there is a Federation officer at a high enough approval level, then that Federation officer can raise the approval level of the requesting officer. Otherwise, the Data Manager can edit the account record.

At least one Federation officer should have Data Manager approval. If that isn't the case, the system manager can edit Federation officer approvals to provide a Data Manager.

1.16 A Federation officer has ceased office

There may be reasons to delay if the Federation officer has ordered a PAGB service or has entered a PAGB event for the Federation, and the service or the event results have not yet been delivered.

A Federation officer may be deleted using the delete icon.

1.17 A new Speaker Activity approval has been requested

A speaker activity may be Judge, Lecture, Educate or Workshop and the same procedures apply to all.

Generally, speaker activities will only be added and then approved on a decision of the Federation's Judges Officer. Local practice determines whether the Judges Officer is a Data Manager or whether the Judges Officer instructs a Federation Data Manager.

A new request is marked as 'Not Approved'. The Data Manager can approve a request using these levels:

- Provisional. The Federation is happy to have the speaker activity on record, but the activity will not be displayed to users.
- Local. The Federation approves the activity, but only users in the same Federation can see it. This is equivalent to inclusion in a Federation list or handbook.
- National. The Federation approves the activity, and users in all Clubs in all Federations can see it. This is equivalent to inclusion in the PAGB handbook.

1.18 Approving a Speaker Activity by someone who is not a Club member.

It is possible for someone who is not a Club member to create an account in the system and then create an activity which will need approval. The relevant Federation Data Manager should control the addition.

The Data Manager should first check whether the speaker already has an account in the system. On the appropriate approval window for the activity type, click 'Add a New Speaker'. Type the name and see whether that is found. If the name is not found, then a new system account is needed. If the name is found, make sure the account email matches that of the proposed speaker.

The Data Manager can create a starter account for the speaker if one is not found. Later the speaker will need to activate the new account by doing a password reset.

Selecting the account for the speaker, create a speaker activity record of the required type and complete enough of the other fields. Allocate 'Provisional' approval.

Liaise with the speaker who will need to activate the account if necessary. Then ensure the speaker completes the activity record, before the Data Manager changes the approval to 'Local' or 'National' as required.

1.19 Speaker Activities from an Adjacent Federation

When a Home Federation (speaker's Club or speaker's residence) gives approval to an activity, that activity is automatically offered to adjacent Federations within a 60 mile radius of the speaker's postcode. This is intended as a benefit for Clubs near the border of the Home Federation.

The offered activities will appear in the Federations list of unapproved activities and the Federation may choose to ignore these, or can choose to grant Local approval to some or all. National approval should not be granted.

1.20 A Speaker Activity approval must be changed

The approval level for a speaker activity can be changed at any time.

A Data Manager can delete (bin icon) approval of an activity record, but this is only a quick way to mark the record unapproved. The record will still appear in the Federation's unapproved list. An activity record cannot be deleted by the Federation. This method retains any editing additions made by the speaker in case the record needs to be approved again.

The speaker can hide their own activity regardless of the approval level. The speaker can delete their own activity record, which is also how to remove any duplicates.

Note: There is a separate procedure by the system managers acting on instructions from the PAGB Judges Officer to grant or remove PAGB level approval to an activity.

1.21 Obtaining Reports

Reports can be exported from the options in the Memberships menu using the export icon (top left). Reports are in csv format (convertible to Excel workbook).

- The Clubs report includes Name, Postcode, Website, Active/Inactive. The report does not include contact information which would be known from the Federation's own records.
- The Officers report includes First name, Last name, Role, Email, Approval level.
- Speaker Activity reports are available separately for Judge, Lecture, Educate and Workshop. The reports include First name, Last name, Title (of activity), Email, Activity level, PAGB approval.

The main purpose of reports is to provide a check against any Federation records and highlight changes requiring attention.

1.22 Making Regular Checks

Ideally, Club records in the Federation, records of Federation officers and records of Speaker approvals should be updated as events change. It is understandable that this doesn't always happen. An annual check is recommended.

- Where a Federation collects Club information annually, eg, for a Yearbook, then that is a good time to check the Club records. There should be a record for every Club and all Clubs should have the correct name.
 - Ticked Active for PAGB affiliated Clubs.
 - Unticked to be Inactive for any former Club, any Club affiliated through another Federation, any Club which does not meet the affiliation conditions or any duplicate record.
- Federation officers' approvals should be checked with the accounts deleted for those no longer authorised to act for the Federation.
- Club accounts are best left to the Club to manage. Any obvious discrepancies should be raised with the Club Secretary. The Club should have at least one officer with 'Advanced' approval.
- Speaker activity approvals should be checked with the Federation Judges' Officer.

1.23 Raising Issues

Data Managers should raise data quality issues with the system managers. Such as:

- An individual appears to have more than one account.
- An individual is using a club generic email.
- An individual appears to have multiple records within one Club or multiple records in multiple Clubs.

The system managers are able to merge records where duplication is confirmed, and take any other necessary action.

1.24 Correcting Errors During Bulk Load

If, during bulk load of activities eg, judging, the Data Manager needs to create a starter account for the speaker, then there will be some typing mistakes.

An account is owned by the named individual but the creator of the account is now included in the record. Both the owner and the creator can amend the critical fields in the account including email, telephone and postcode.

A Data Manager cannot amend an account created by the owner, and the feature is not retrospective to earlier accounts created by a Data Manager.

2. Administrators

2.1 Explaining Administrator Levels

Behind the descriptions, Federation approval levels are numbered. Numbers 1-3 are the Basic, Normal and Advanced Federation User levels. Numbers 4-5 are the Basic and Advanced Federation Data Manager levels. The levels above those are:

- 6. Basic PAGB Administrator
- 7. Advanced PAGB Administrator
- 8. PAGB CES Manager
- 9. Super User
- 10. Super User *

The precise extra functions available to each level may change with experience, but the object is that the system can be run with adequate delegation coupled with adequate training and control.

If a delegated Data Manager feels that they are unable to perform functions which they would consider appropriate, then either their approval level can be changed, or the system controls could be modified.

2.2 Administration Menu

The administration menu only displays for certain levels of administrator and some functions are restricted to particular individuals.

Some menu items allow for administrator notes not visible to others in the system.

The menu includes these functions:

- Part 1 (Memberships):
 - Manage Individuals
 - Manage Clubs
 - Manage Federations
 - Manage Memberships
 - Manage Key Roles
- Part 2 (Speakers)
 - Manage Speakers, including access to the PAGB approval setting
 - Speaker Subscriptions
- Part 3 (Competitions):
 - Competitions
 - Run Competitions
- Part 4 (Services):
 - Ticket Events
 - Calendar Events
 - Recorded Lectures
 - Printed Materials
 - Generate QR codes
- Part 5 (Communications):
 - Communications
 - Online Form Design
 - News Ticker
- Part 6 (Systems):
 - System Console
 - System Settings
- Part 7 (Logs):
 - User Activity