



The Photographic Alliance of Great Britain

CENTRAL MANAGEMENT SYSTEM - USER MANUAL CLUB DATA MANAGERS

Introduction

The 'CMS' 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 Club Data Managers. Club Data Managers should also be familiar with the separate 'How Do I ?' manuals which cover accounts and general use by Club members and Club officers.

Club Data Managers are important because they know their Club members and officers directly. Having correct and up to date data for Clubs means knowing that all access to the PAGB system is from valid users. That is the basis for developing effective delivery of a wider range of services.

7. Club Data Managers

A Club should have one or more officers approved in the system with Advanced level permission, and with the Data Manager option ticked.

['Officer' in the system means any Club committee member, or other person agreed within the Club with authority to act in the name of the Club. The list is entirely the Club's choice.]

See the separate 'How Do I ?' manual for how to obtain Club officer approval. If a Club has no officers approved yet, or has no Club Data Manager yet, then the Federation has a Data Manager who can assist. It always helps if the Club website has a list of committee members.

Most actions specific to Club Data Managers take place within the Club section of the Membership menu (see **7.1** to **7.7**).

Other actions take place in the Club section of the Edit menu (see **7.8**).

7.1 Club Member Records

It is not necessary for all current Club members to have a record in the system.

A Club member will have a record with an account (email showing) only if that member has chosen to create an account.

A Club member will acquire a record, but without an account (no email showing) if an image for that member has been entered by the Club to a PAGB competition.

7.2 A New Member Has Joined the Club

A Club member does not require an account in the system (see **7.1**). The Club Data Manager cannot create an account.

The new member can create an account if one does not exist, and can request approval as a member of the Club via the Registrations menu (see 7.3).

7.3 A New Club Member Approval Has Been Requested

When an account holder requests approval as a member of the Club, the Club Data Manager will receive an alert email.

The Club Data Manager logs on and uses the Club section of the Memberships menu to view the list of Club members. If necessary click to Toggle showing Inactive members.

- To approve the membership request, tick the member name to be Active.
- To refuse the membership request (because it might be a mistake), delete the member name (bin icon).

7.4 A Club Member Has Resigned (or Died)

The Club Data Manager logs on and uses the Club section of the Memberships menu to view the list of Club members. If necessary click to Toggle showing Inactive members.

- Normally, delete the member (bin icon).
- Alternatively, if it is believed that the member will re-join shortly, untick the member to make them Inactive.

Deleting a Club member approval is safe. It does not delete that person's account, or any of that person's images, or any of that person's applications for Awards for Photographic Merit (APM), or remove any images from the Club's records of entries to PAGB events.

7.5 A New Club Officer Has Been Appointed

It is not necessary for all Club officers to have an account in the system, or to be recognised as a Club member, or as a Club officer. The Club Data Manager cannot create an account.

However, if the Club is expecting the officer to use the system for Club purposes then the officer will need an account including Club member approval and Club officer approval. See the relevant 'How Do I ?' manuals.

7.6 A New Club Officer Approval Has Been Requested

A Club officer approval request can only come from an account already approved as a member of the Club. The Club Data Manager will receive an alert email.

The Club Data Manager logs on and uses the Club section of the Memberships menu to show the list of Club officers. The new request will be in that list.

- To approve the request, set a permission level. Assuming the Club Data Manager already has Advanced permission, all the following should be available:
 - 'Limited' gives basic access.
 - 'Normal' gives adequate access for most purposes.
 - 'Advanced' includes the ability to edit Club details.
 - The role description can be edited.
 - There are tick box options for Club Competition Officer and for Club Data Manager and these can be set as required.
- To refuse the officer request, delete the record (bin icon).

7.7 A Club Officer Has Retired (or Died)

The Club Data Manager logs on and uses the Club section of the Memberships menu to view the list of Club officers.

Delete the officer approval (bin icon).

7.7.1 The Club Data Manager Has Retired (or Died)

The officer approval will be deleted (bin icon) as above, but a new Club Data Manager needs to be appointed if there was not already a duplicate appointment.

Any existing officer can be appointed as a Club Data Manager by ticking the box against their name.

At least one officer record should have Advanced permission. An existing officer with Advanced permission can increase the permission level of another officer. If there is no such officer, the Federation Data Manager can assist.

7.8 Club Information Details

The Club Data Manager logs on and used the Club section of the Edit menu to view the information details for the Club.

The list of officers is for information and is best edited via the Memberships menu (see **7.6**).

The Club name can only be changed by a system manager (see **7.10**).

The other fields are:

- Club Venue: This will be displayed in the Find A Club map.
- Postcode: Make sure this is in the correct format including the space. If the postcode is changed, clear the contents of both the Longitude and Latitude fields to ensure the Find A Club map recalculates both values from the Postcode.
- Membership email: Optional.
- Website: Optional. If used, include the http:// or https:// prefix.
- Find a Club Location (Longitude and Latitude). Clear these two fields if the postcode is changed (see above). Do not set values yourself.

7.9 Making Regular Checks

Ideally, Club records should be updated as events change. It is understandable that this doesn't always happen. An annual check is recommended.

The Club Data Manager should review the list of Club members to make sure those shown are still members. For the reasons given already, it is not necessary for the list in the system to be a complete list of the Club membership. For any shown who are no longer members, see **7.4**.

The Club Data Manager should review the list of Club officers to make sure those shown are still officers. For the reasons given already, it is not necessary for the list in the system to be a complete list of the Club officers. For any shown who are no longer officers, see **7.7**.

The Club Data Manager should review the Club information details.

7.10 Raising Issues

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

- The Club name is incorrect eg, it has been changed by the Club.
- 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 the Club.

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