



# The Photographic Alliance of Great Britain

## CENTRAL MANAGEMENT SYSTEM - USER MANUAL FEDERATION 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 Federation Data Managers. Federation 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.

Federation Data Managers may be called on to help Club Data Managers. There is a separate manual for Club Data Managers.

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.

## 8. 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 **8.15** for how to appoint a Federation Data Manager.

Most actions specific to Data Managers take place within the Membership menu in the Federation section.

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

### 8.1 Explaining Data Manager Approval Levels

There are two approval levels above Federation Advanced:

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

There are more levels above Data Manager, which are outlined in the Appendix.

### 8.2 Adding a New Club

Check sections **8.2.1** and **8.2.2** below before proceeding. If in doubt, consult the system managers.

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

Fill in the offered fields at the top of the list. 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.

Click 'Add New Club'. Ensure the Active box is ticked unless **8.2.1** or **8.2.2** apply.

### **8.2.1 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 using the name format as shown in **8.2.2**, and with the record unticked 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.

### **8.2.2 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 Federation lists complete, both Federations should have a record for the Club and these will be separate records.

- The affiliation Federation ticks its record to show 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. The Club name also needs to be annotated and this can only be done by a system manager.

The Club name format for an unaffiliated member is:

- <club name> (<fedcode> unaffiliated member)
- Example: New Camera Club (UKPA unaffiliated member)

### **8.3 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. The name of the Club must not be changed. Club records are never deleted.

An inactive Club will not appear in the pick list of Clubs, meaning that Club activities 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.

#### **8.4 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 if 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 **8.2**.

#### **8.5 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 **8.3** to make the closing Club Inactive. Use the procedure in **8.4** to change the ongoing Club's name if required.

Members moving from one Club to the other will need to raise a registration request for membership of their new Club. 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.

#### **8.6 A Club has moved from one Federation to another**

The Club record shows which Federation holds the Club's membership, and the setting can be changed.

The situation is more complicated if:

- The Club wishes to join a new Federation for PAGB affiliation, while remaining a member of the previous Federation.
- The Club already holds dual membership and wishes to switch PAGB affiliation.

Preferably put the required change to the system managers as new records may be required or Club name annotations may need to be changed. In any case, it is desirable to move the Club complete with its existing membership and officers.

#### **8.7 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 **8.3** to make the Club Inactive.

Consult the system managers about the inactive duplicate Club. The managers will probably change the name to annotate it with your Federation code and 'Duplicate', and move the record out of your Federation and into the 'ZNFO' dummy Federation.

The system managers can also move members from the inactive Club to the active Club. Any image records still linked to the inactive Club are retained.

#### **8.8 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 **8.2** to resolve), or the Club is not eligible for PAGB affiliation (see **8.2.1**), or the Club is not a member of any Federation.

### **8.9 A new Club member approval has been requested**

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

There may also be situations where a Federation needs to add the member of one Club to be 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.

### **8.10 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.

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.

### **8.11 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 Federation 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. At least one Club officer should also be ticked as Club Data Manager. The aim is that Clubs can manage their own data effectively.

### **8.12 A Club officer has ceased office**

Ideally a Club Data Manager can delete records for those leaving office, but the request maybe escalated to the Federation.

A Club officer may be deleted using the delete button (bin icon).

### **8.13 A new Federation officer approval has been requested**

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. Also check that an appropriate role has been chosen.

To refuse the request, delete the record in the Federation officer list (bin icon).

### **8.14 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.

### **8.15 A Federation officer has ceased office**

A Federation officer may be deleted using the delete button (bin icon).

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.

### **8.16 A new Speaker Activity approval has been requested (User Generated)**

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 after agreement with the Federation. Federations may have a Judges Officer for this purpose. Local practice determines whether the Judges Officer is a Data Manager or whether the Judges Officer instructs a Federation Data Manager.

In the Memberships menu, and the relevant activity submenu item, entries can be filtered to Approved, Unapproved, or both together. The default view is Approved. To see Unapproved only: deselect Approved, wait for the screen to clear, and select Unapproved.

A new request will be in the Unapproved list and be marked as 'Not Approved'. It will be mixed with activity offers from other Federations (see **8.20**). However, your own Federation records will have a date and the 'no parking' icon in a column on the right, allowing them to be identified easily. Offers from other Federations will be shown as 'Set Approval' without a date.

When viewing an Activity note the expected format:

- The Title field is in italics and is what is searchable in the register:
  - A judging Activity should be the person's name usually with distinctions.
  - The other Activity types should be 'title by name(s)' usually without distinctions. For two presenters, both names should be in full ie, Jack Smith & Jill Smith – not Jack & Jill Smith.
- The Title should be followed by 'by name', in normal font, where this name is the account holding the record.
- Therefore, expect to see two 'by' occurrences: for the Title and for the account.

The Data Manager can change an approval level using these levels:

- Click the 'no parking' icon to change to 'Set Approval'. This is also a way to cancel an existing approval from the Approved list.
- 'Set Approval'. The Activity is in the Unapproved list.
- 'Not Approved'. The Activity is in the Unapproved list. The Activity displays with a date and the 'no parking' icon. (This setting was previously called 'Pending').
- 'Provisional Approval'. The Activity is in the Approved list. This is the same as Local (qv) but the Activity is marked as Provisional when searching. This level might be appropriate for new judges or those awaiting training.

- 'Local Approval'. The Activity is in the Approved list. The Federation approves the Activity, but only users in the same Federation can see it. Historically, this is equivalent to inclusion in a Federation list or handbook.
- 'National Approval'. The Activity is in the Approved list. The Federation approves the Activity, and all Clubs in all Federations can see it. Historically, this is equivalent to inclusion in the PAGB handbook.
- 'Retired'. The Activity is in the Approved list. Provided that another Federation has not given approval, then the Activity is not viewable on a register search. The only way to ensure an Activity is no longer viewable is for the Speaker to set 'No Longer Available' or to delete the Activity record.

An activity which states a fee will display with '££'. It can be approved, but the activity will not appear in the register unless the speaker pays the PAGB listing subscription. If the Data Manager is aware that a speaker charges a fee, but '££' is not shown, then liaise with the speaker and do not approve the activity.

Note: The Data Manager cannot access the Fee box for an Activity. Like the Description, this is reserved to the Speaker. There is anyway no Fee box for a judging as judges may not charge a fee or request a donation, meaning judging Activities will never show '££'.

### 8.17 Creating a Speaker Activity (Federation Generated)

**This procedure was developed for bulk addition of judges. Although described here it is no longer recommended, and certainly not for adding other activity types as the Data Manager is unlikely to have enough information to create complete records.**

**Experience has shown that adding accounts and records for speakers without their direct involvement results in many accounts which have never been completed with a password by their 'owner'.**

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 there are any matches.

If there is no match for the name, then a new system account is needed. The Data Manager can create a starter account for the Speaker. Later the Speaker will need to activate the new account by doing a password reset.

If there are matches for the name, then there is a safety check so that a wrong entry is not chosen.

- If there are three or fewer matches for the name, and one of them is the correct name, then options are offered to enable creation of a starter account if required, and then a Speaker Activity record of the required type. Complete enough of the other fields. For the Title field:
  - Judging: The field should be prepopulated from the account.
  - For other activities: Insert a short title of the activity and 'by' and the name (or two names for joint presenters).
  - Liaise with the Speaker and advise if they need to do a password reset to activate the account. Then ensure the Speaker completes the Activity record, before the Data Manager changes the approval (as described in **8.16**).
- If there are four or more matches for the name, it will not be possible to proceed even if one of them is correct. The Speaker must be asked to create their own account (if required) and Activity record (as described in the Speakers documentation).
- If there are names shown but none of them is the correct name, then it will not be possible to proceed. The Speaker must be asked to create their own account and Activity record (as described in the Speakers documentation).

### **8.17.1 Correcting Errors**

During bulk load of Activities eg, judging, the Data Manager may need to create a starter account for the Speaker, then there can 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.

### **8.18 Avoiding Duplicate Activity Records**

A Speaker's Home Federation is either (a) the Federation of their Club or (b) if the Speaker is not a Club member, the Federation of the Speaker's residence.

In the printed PAGB Handbook a Speaker may be listed by more than one Federation. In the CMS, a Speaker should only seek approval from their Home Federation and not from any other Federation. If the Home Federation gives National approval, then the Speaker will be visible in all Federations anyway. If the Home Federation gives Local approval, then the Activity will still be offered to adjacent Federations for their Local approval (see **8.19**).

Federations are requested not to give primary approval to Speakers from a different Home Federation as this will create multiple records for the same Activity.

- For judging, the Speaker should have only one Judge record.
- For Lecture, Education, Workshop, the Speaker should have only one record per Activity (ie, Title).

The system managers will take any action necessary to remove duplicate Activity records.

### **8.19 Speaker Activities from an Adjacent Federation**

An Activity is automatically offered to the Federation Data Manager if it is within an 80 mile radius of the Data Manager's postcode. This alerts the Data Manager to activities which could be a benefit for Clubs near the border of the Home Federation.

The offered Activities will appear as 'Set Approval' in the Federation's Unapproved list.

The Federation may choose to ignore these, or can choose to grant Local approval to some or all. A Club in your Federation can then see those extra Activities from nearby Federations when filtering a search to Local.

National approval should not be granted to Speakers from other Federations as that would override any Local approval setting by the Home Federation.

### **8.20 A Speaker Activity approval must be changed**

The approval level for a Speaker Activity can be changed at any time.

The different levels are described in **8.16**.

- The most common change will be between Local and National or vice versa.
- The Federation can set the Activity to 'Retired'.
- To unapprove the record, use the 'no parking' (Ø) icon to mark the record 'Set Approved'. The record will move to the Federation's Unapproved list. This retains the record allowing it to be approved again later.

An Activity record cannot be deleted by the Federation.

The Speaker can hide their own Activity regardless of the approval level.

The Speaker can delete their own Activity record, which is one way to remove any duplicates.

### **8.20.1 PAGB Judges**

There is a separate procedure by the system managers acting on instructions from the PAGB Judges Officer to grant or remove PAGB level approval for a judging Activity. The setting is applied to an existing Activity record to indicate accreditation. Users can search on this setting.

Note: The PAGB has agreed a separate procedure for approving other Activity types (Lecture, Educate, Workshop) where a Federation would be unavailable to act as Home Federation. Examples would include ex-UK speakers. In these cases the system managers acting on instructions from the PAGB Judges Officer will manage creation and approval of the Activity record using 'ZNFO' as the Home Federation. These activities will have National level approval but not the accreditation applied to PAGB judges.

## **8.21 A Speaker has moved Federation**

When a Speaker moves home, they can move within their Federation, to an adjacent Federation or to a distant Federation. In all cases, the Speaker must update their own contact details.

No action is required by the Federation for a move within the same Federation.

Actions are required by the new Federation and by the previous Federation if the Speaker moves to a different Federation.

### **8.21.1 Actions by new Federation**

The Speaker should liaise with the relevant Federation officer to ask for their current approvals to be recognised by their new Federation.

Do not create new Activity records, which would duplicate existing records.

It is the Federation's choice whether or not to agree approvals. The Federation can request references from the previous Federation. The Federation can require local training before approval. The Federation can refuse approvals.

The Speaker's new postcode will place the Activity(s) into the new Federation's Unapproved list, showing as 'Set Approval'. [Note this is different from a new Activity which shows in the Unapproved list as 'Not Approved'.] The Federation can change the approval level (see **8.20**).

### **8.21.2 Actions by previous Federation**

The Speaker should inform the relevant Federation officer.

If the move is to an adjacent Federation, then the Federation may wish to change any approval level to 'Local' (see **8.20**).

If the move is to a distant Federation, then the Federation may wish to cancel the approval (see **8.16**).

## **8.22 An Account Holder has died**

A Data Manager may be notified or it may become apparent that an account holder has died. A Club may ask what action to take, and there may be reasons to prevent future outgoing contact messages to the account email.

- Club membership. A Club Data Manager can delete a member record via Club membership (bin icon). A Federation Data Manager can delete a Club member



record after accessing the Club via Federation members and then the Club's members.

- Club officer. A Club Data Manager can delete a Club officer record (bin icon). A Federation Data Manager can delete a Club officer record after accessing the Club via Federation members.
- Federation officer. A Federation Data Manager can delete a Federation officer record (bin icon).
- Speaker activities. A Federation Data Manager can remove approval from an activity record (no-entry icon). However, this does not remove any approval which may have been given by a nearby Federation. Ideally refer to a System Manager requesting deletion of the activity records.
- Image records. Image records and their connection to the account are never deleted.
- APM records. APM records and their connection to the account are never deleted.

### 8.23 Obtaining Reports

This function requires Advanced Federation Data Manager level approval.

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, Email, Activity status, Fee, Federation approval level and PAGB approval.

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

### 8.24 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 appropriate roles and flags for current officers and records 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.

## 8.25 Raising Issues

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

- A Club name has to be changed eg, because of a Club decision.
- 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.
- An individual appears to have multiple records for the same Activity (see **8.19**).

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

## Appendix. Administrators

### 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 \*
- 11. System Manager

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.

### Administration Menu

The administration menu only displays for certain levels of administrator.

Some menu items are restricted to particular approval levels or specific 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 Sponsors
  - 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
- Document Archives
- Manage Print Archives
- Historical Archives
- Print Worker Awards
- Generate QR codes
- Part 5 (Communications):
  - Communications
  - Interest Groups
  - News Ticker
- Part 6 (Systems):
  - Online Form Design
  - User Activity
  - System Console
  - System Settings