



Softball Australia

mySoftball Community Training

Module 1

B) – Setting up the System

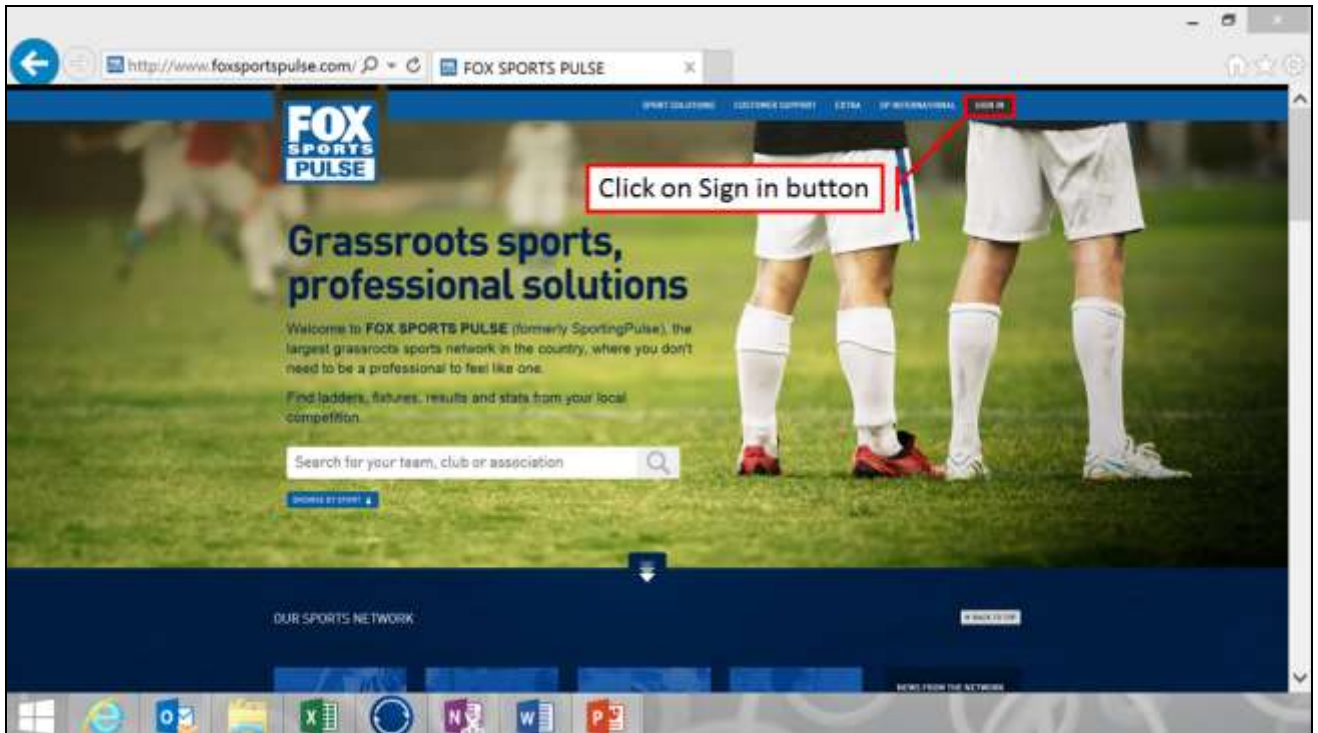
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Updated 19 May 2015

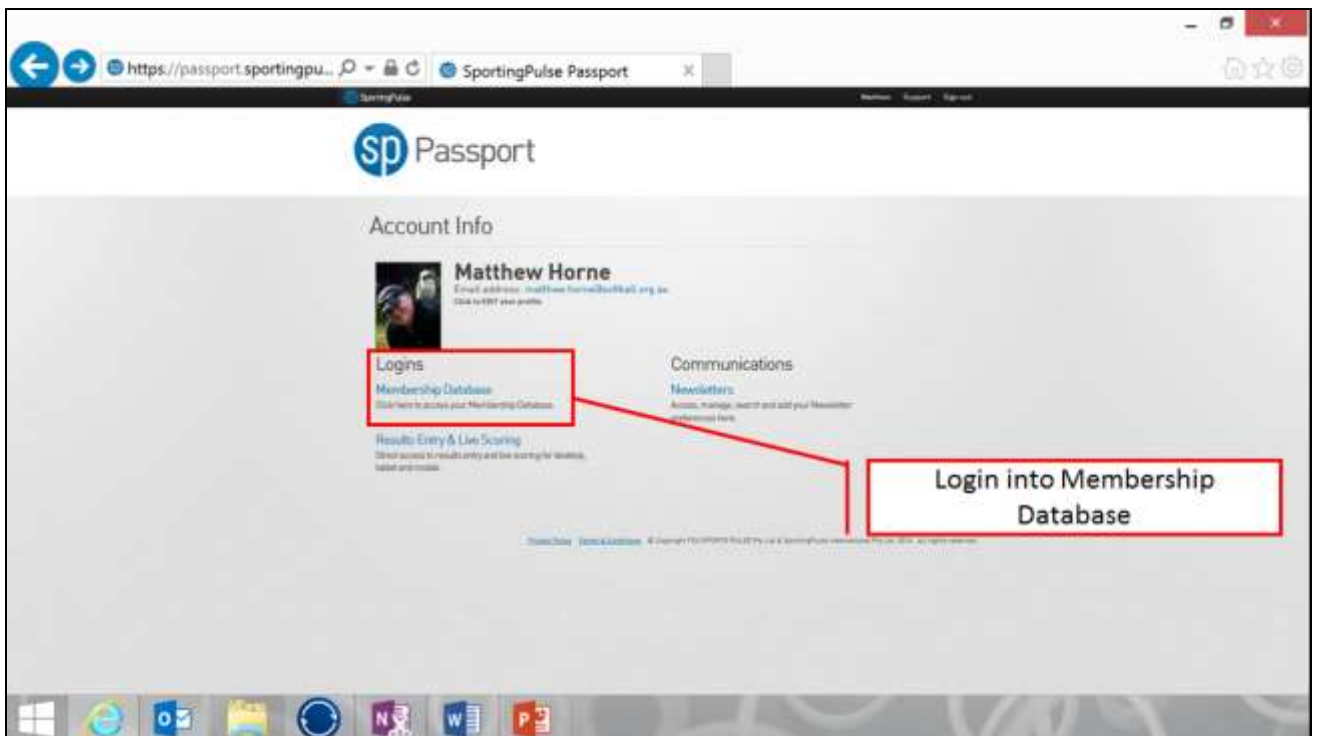


Login

- 1 Go to <http://foxsportspulse.com>and click on the *Sign In* button.

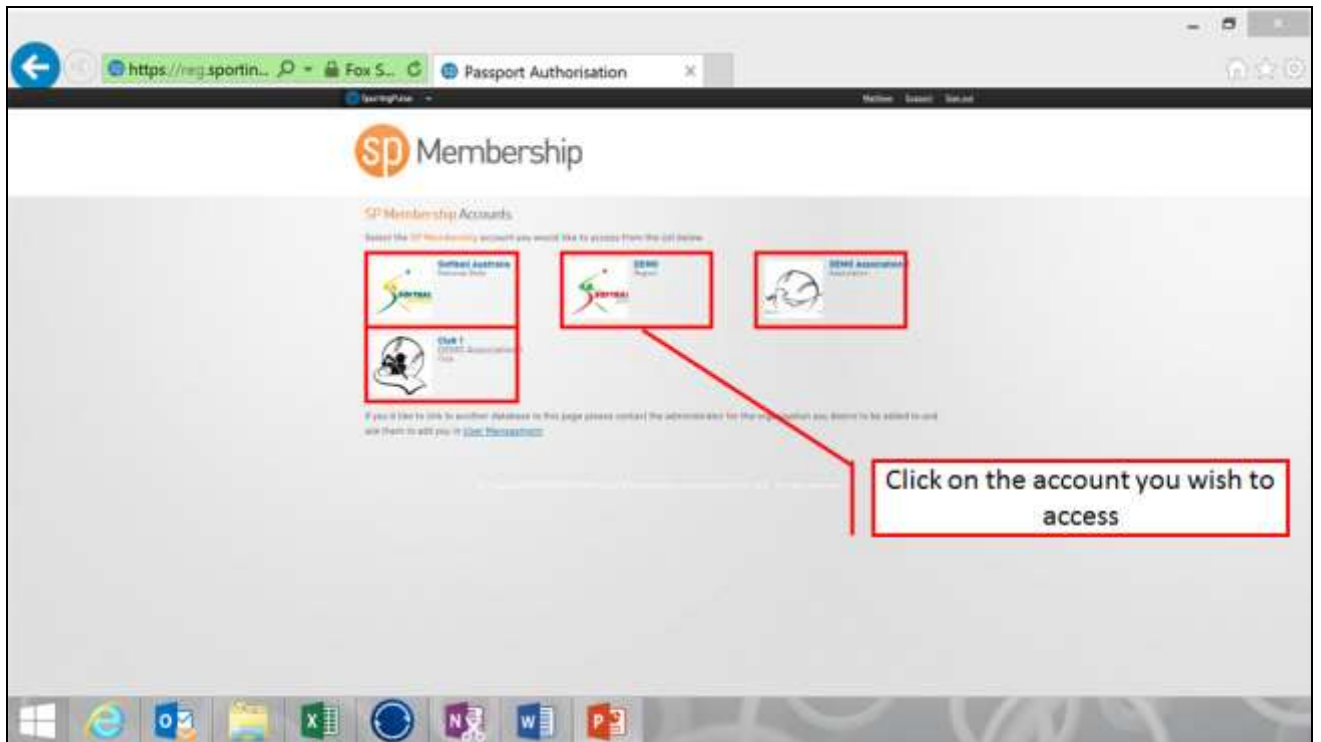


- 2 Login to the Membership database.

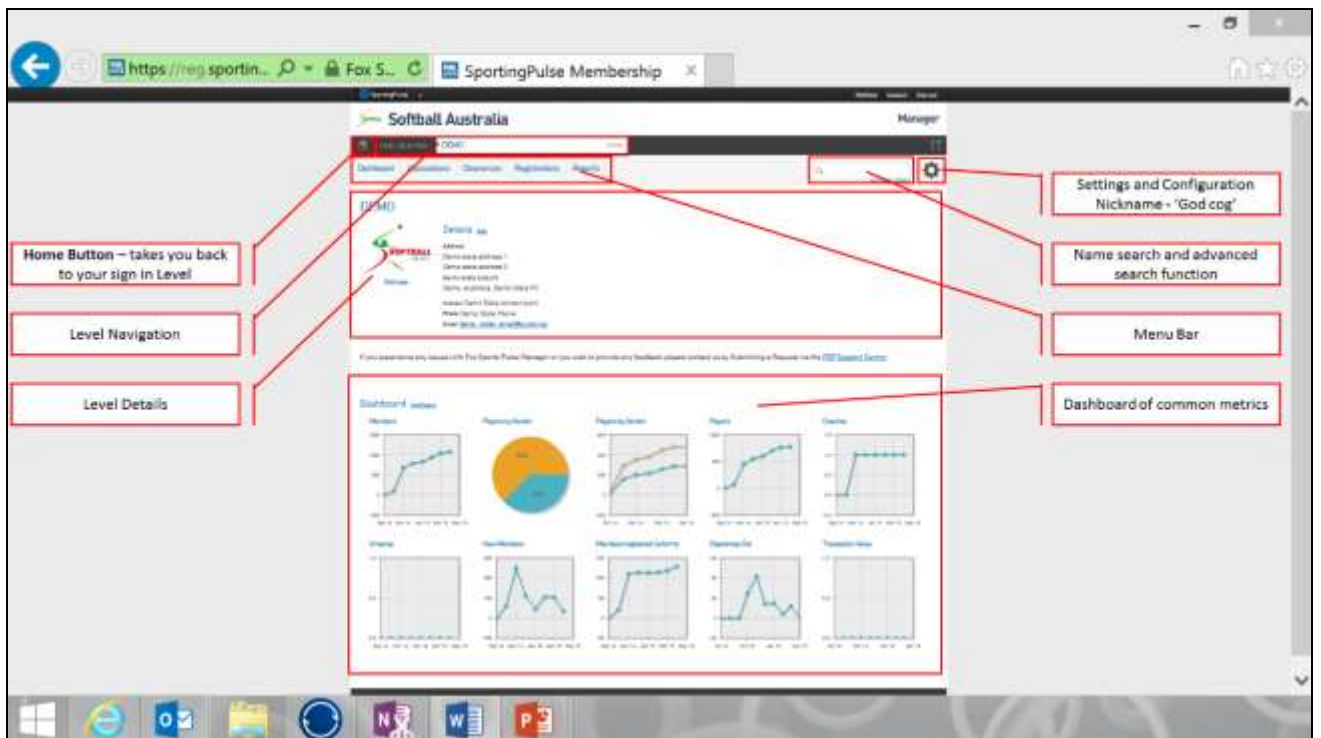






3 Select the Membership Account you wish to access.



4 You are now in the mysoftball Community Membership Database.



5 Brief description of front page, starting on the left hand side:

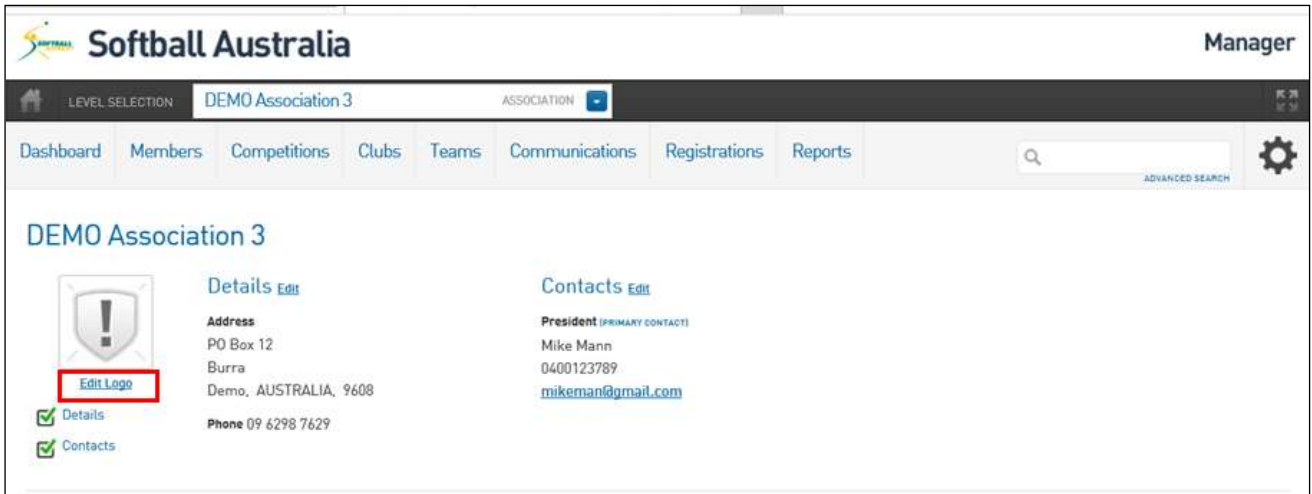
Home button	Returns you back to your sign-in.
Level navigation	Allows you to move up levels (if you have drilled down) rather than going back to the very top via the home button.
Level details	<p>State – contains main contact name and address/contact details.</p> <p>Association and club – contains club address/contact details, and lists committee member contact details and roles.</p> <p> IMPORTANT: Must be completed for key hierarchy activities.</p>
Setting and configuration – AKA ‘God Cog’ 	Contains all the setting and configuration options available at your level.
Word search	Used to look up members, clubs and associations (dependent on permit level). Advanced search allows more targeted searching for members.
Menu bar	Pull-down menus to manage and run the member database, and competitions.
Dashboard	Graphical view of many of the key metrics used to see trends in measurable activity.



Your organisation's profile

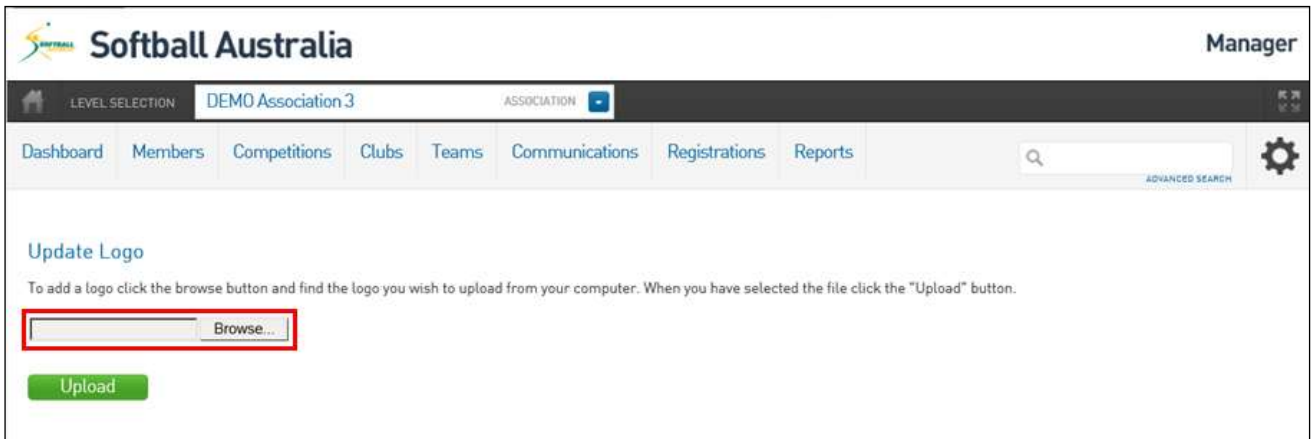
Logo

6 Select **Edit Logo**.



The screenshot shows the 'Softball Australia Manager' interface for 'DEMO Association 3'. The navigation menu includes Dashboard, Members, Competitions, Clubs, Teams, Communications, Registrations, and Reports. The main content area displays the association's details, including an 'Edit Logo' button highlighted with a red box. Other details include the address (PO Box 12, Burra, AUSTRALIA, 9608), phone number (09 6298 7629), and contact information for the President, Mike Mann (0400123789, mikeman@gmail.com).

7 Click on **Browse** to search and select your logo.



The screenshot shows the 'Update Logo' section of the interface. It includes instructions: 'To add a logo click the browse button and find the logo you wish to upload from your computer. When you have selected the file click the "Upload" button.' The 'Browse...' button is highlighted with a red box, and the 'Upload' button is visible below it.

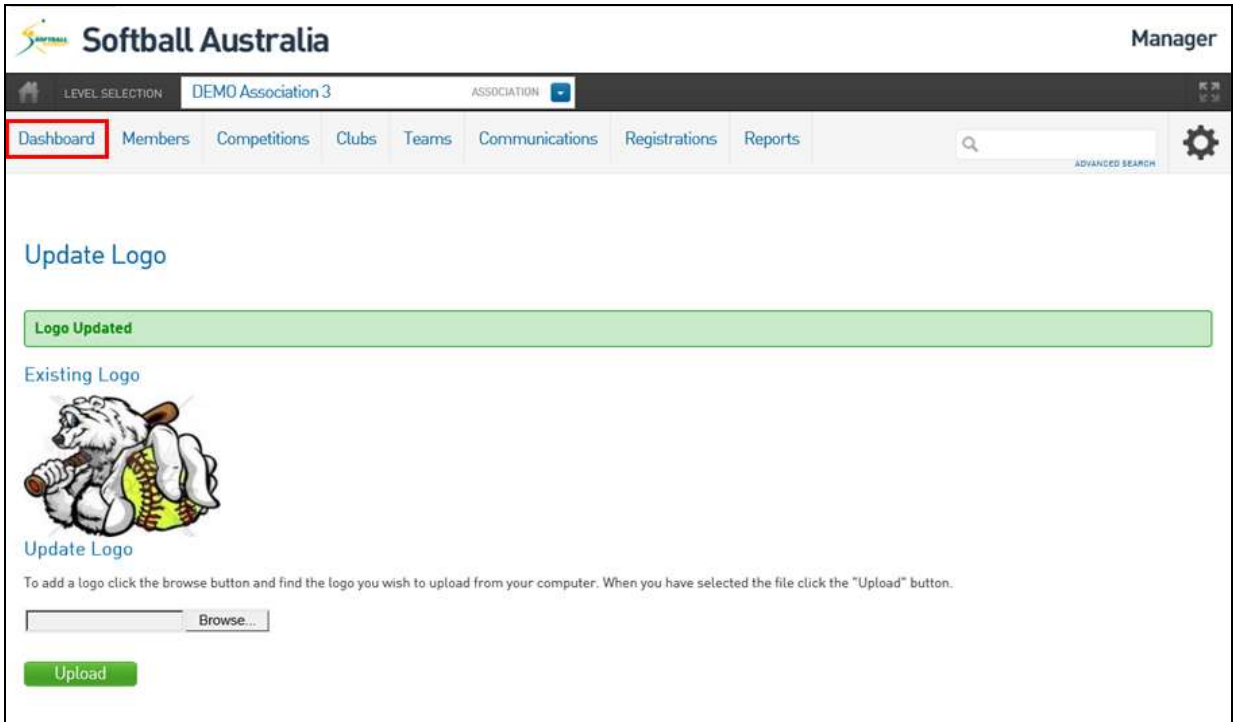
8 Click on **Upload**.



The screenshot shows the 'Update Logo' section with the file path 'C:\Users\user\Desktop\...' entered in the text field. The 'Upload' button is highlighted with a red box.



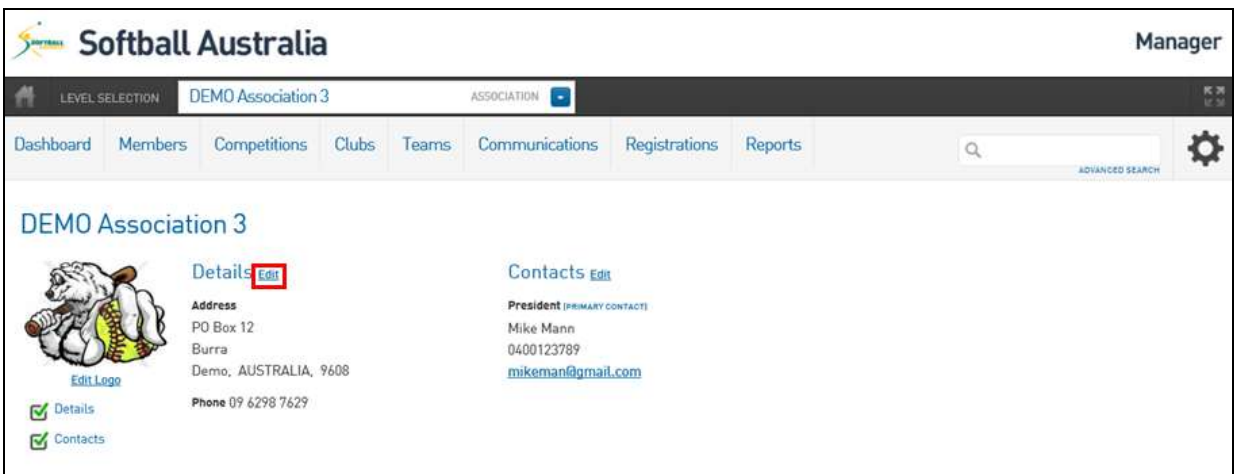
9 Click on **Dashboard**.



10 Your logo is now setup in the details section.

Address details

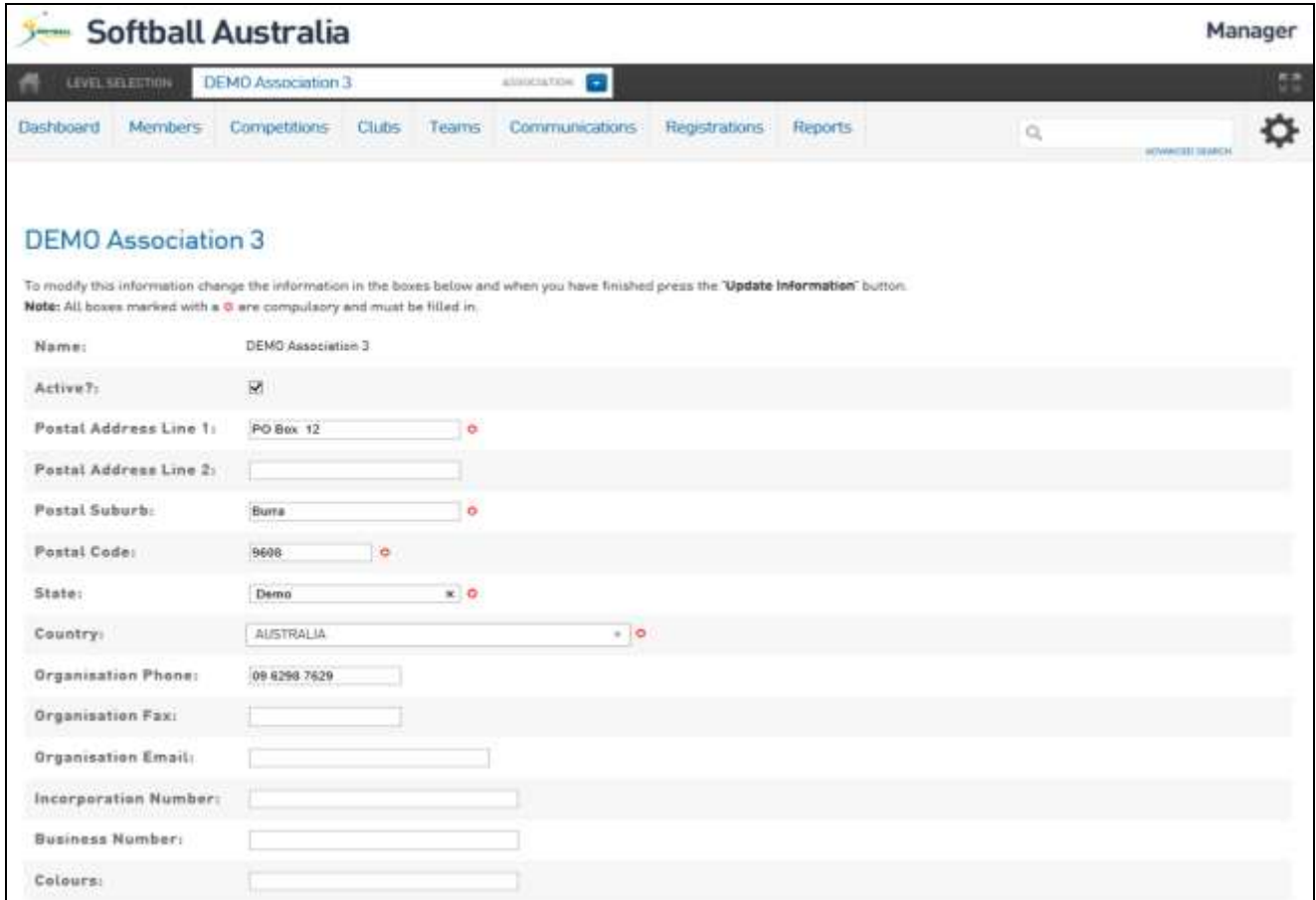
11 Select **Edit** (next to the **Details**).











12 Complete as much information as possible.

NOTE: Fields marked  are mandatory.



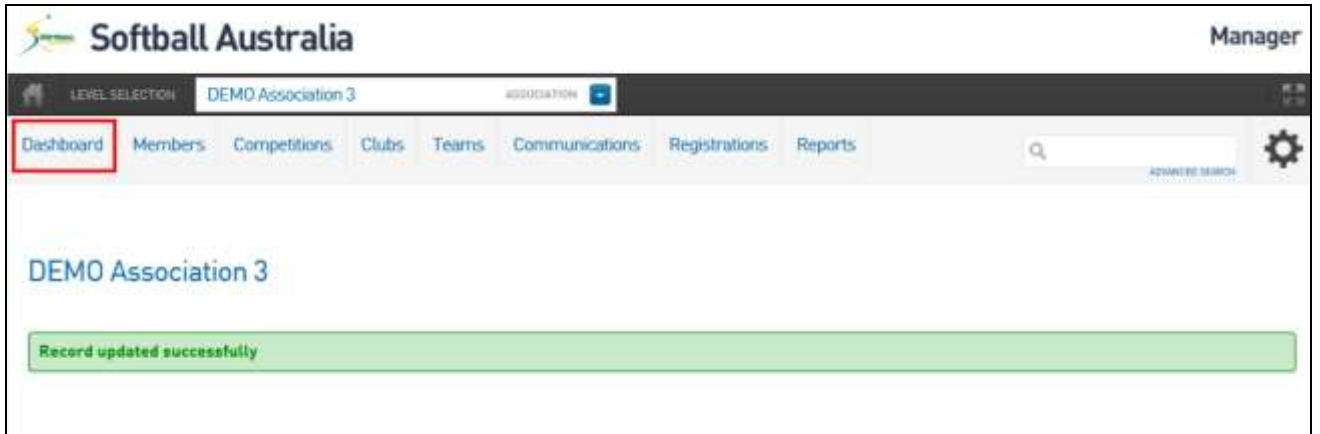
The screenshot shows the 'Softball Australia Manager' interface for 'DEMO Association 3'. The page has a navigation menu with 'Dashboard', 'Members', 'Competitions', 'Clubs', 'Teams', 'Communications', 'Registrations', and 'Reports'. A search bar and a 'HOWEVER SEARCH' button are also present. The main content area is titled 'DEMO Association 3' and contains a form for updating association information. A note states: 'To modify this information change the information in the boxes below and when you have finished press the "Update Information" button. Note: All boxes marked with a  are compulsory and must be filled in.' The form fields are as follows:

Name:	DEMO Association 3
Active?:	<input checked="" type="checkbox"/>
Postal Address Line 1:	PO Box 12 
Postal Address Line 2:	
Postal Suburb:	Burns 
Postal Code:	9608 
State:	Demo 
Country:	AUSTRALIA 
Organisation Phone:	08 8298 7629
Organisation Fax:	
Organisation Email:	
Incorporation Number:	
Business Number:	
Colours:	

13 Click on **Update Information** at the bottom of the page.



14 Click on **Dashboard**.




15 All your association or club information is now updated.



Association and club contacts

16 Select **Edit** next to **Contacts**.

17 There is a list of all the roles available to an association and club.
 The page can be viewed in two sections.
 A – the Roles going down the page
 B – the Responsibilities handled by each person going across the page.

 **IMPORTANT:** every association and club **must** have the following four Responsibilities covered (ticked off)....even if it is one person – as shown in this example.

Primary contact	The person and contact details is shown in the Database.
Clearance and Permits	The person who has the responsibility to create, and then approve or deny clearances and permits out of their club.....or approve or deny at an association level.
Finance and payments	The person who will receive emails about financial transactions.
Registrations	The person who deals with all registration emails and notifications.



Softball Australia Manager

LEVEL SELECTION DEMO Association 3 ASSOCIATION

Dashboard Members Competitions Clubs Teams Communications Registrations Reports

Common Roles and Contacts

Details Use this section to update the important contacts for your organisation. Click on the arrow to complete details for each individual, ensuring you indicate which functional responsibilities they take. Only one person can be the primary contact, but multiple people might take responsibility for sponsors and fundraising for example.

Contacts While you should list your full committee, it is fine to have spare positions if there are certain positions your constitution does not allow for. For example, you may not have a registrar. If that is the case, simply leave that blank.

In the bottom section you can add extra committee positions or provide additional functional roles. We use generic titles, so use the one that **B** approximates best the roles you have.

Board or Committee Roles

A [bracketed list of roles]

- President** Mike Mann
- Vice President** Add new Name Here
- Treasurer** Add new Name Here
- Secretary** Add new Name Here
- Registrar** Add new Name Here
- Committee Member** Add new Name Here
- Committee Member** Add new Name Here
- Committee Member** Add new Name Here
- Committee Member** Add new Name Here

Other Roles and Contacts

Functional Responsibilities

Primary Contact	Competition Admin	Social Activities	Website & Publicity	Clearance & Permits	Sponsors & Fundraising	Finance & Payments	Legal & Contracts	Registrations
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18 Click on the arrow box next to the specific role you wish to edit.

Softball Australia Manager

LEVEL SELECTION DEMO Association 3 ASSOCIATION

Dashboard Members Competitions Clubs Teams Communications Registrations Reports

Common Roles and Contacts

Details Use this section to update the important contacts for your organisation. Click on the arrow to complete details for each individual, ensuring you indicate which functional responsibilities they take. Only one person can be the primary contact, but multiple people might take responsibility for sponsors and fundraising for example.

Contacts While you should list your full committee, it is fine to have spare positions if there are certain positions your constitution does not allow for. For example, you may not have a registrar. If that is the case, simply leave that blank.

In the bottom section you can add extra committee positions or provide additional functional roles. We use generic titles, so use the one that approximates best the roles you have.

Board or Committee Roles

B [bracketed list of roles]

- President** Mike Mann
- Vice President** **Click on arrow to open a specific role** Matt Horne
 Postcode: State: Gender:
 Email: Mobile:
- Treasurer** Add new Name Here
- Secretary** Add new Name Here
- Registrar** Add new Name Here
- Committee Member** Add new Name Here
- Committee Member** Add new Name Here
- Committee Member** Add new Name Here
- Committee Member** Add new Name Here

Functional Responsibilities

Primary Contact	Competition Admin	Social Activities	Website & Publicity	Clearance & Permits	Sponsors & Fundraising	Finance & Payments	Legal & Contracts	Registrations
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



- 19 Complete all the details (name, email and mobile number) in the fields provided, and tick the boxes corresponding to the responsibilities that member has on the committee. A member can have multiple responsibilities, and more than one member can share the same responsibilities (except the primary contact).
- 20 Assigning the correct responsibilities is important as communications can be sent to people based on their responsibilities.
- 21 When you have finished adding or editing the contacts, 1. Click on Save, 2. Click on [Dashboard...](#)

Softball Australia Manager

LEVEL SELECTION: DEMO Association 3 ASSOCIATION

2 **Dashboard** Members Competitions Clubs Teams Communications Registrations Reports

Common Roles and Contacts

Details Use this section to update the important contacts for your organisation. Click on the arrow to complete details for each individual, ensuring you indicate which functional responsibilities they take. Only one person can be the primary contact, but multiple people might take responsibility for sponsors and fundraising for example.

Contacts While you should list your full committee, it is fine to have spare positions if there are certain positions your constitution does not allow for. For example, you may not have a registrar. If that is the case, simply leave that blank.

In the bottom section you can add extra committee positions or provide additional functional roles. We use generic titles, so use the one that approximates best the roles you have.

1 **Save**

Board or Committee Roles

	Primary Contact	Competition Admin	Social Activities	Website & Publicity	Clearance & Permits	Sponsors & Fundraising	Finance & Payments	Legal & Contracts	Registrations
<input checked="" type="checkbox"/> President Mike Mann	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Vice President Matt Jones Firstname: Matt Surname: Jones Gender: None Specified Email: mj@1234.com Mobile: 0412345678 Publish on Locator: <input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	


- 22 ...and you will be back at the detail page with the edited changes showing.

Softball Australia Manager

LEVEL SELECTION: DEMO Association 3 ASSOCIATION

Dashboard Members Competitions Clubs Teams Communications Registrations Reports

DEMO Association 3

 [Details](#) [Edit Logo](#)

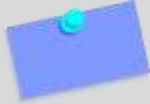
Address
PO Box 12
Burra
Demo, AUSTRALIA, 9608
Phone 09 6298 7629

Contacts

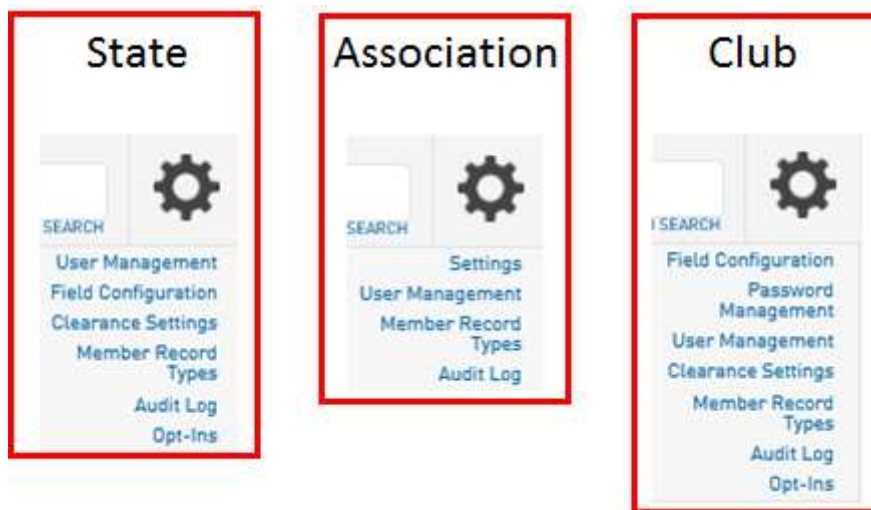
President (PRIMARY CONTACT) Mike Mann 0400123789 mikeman@gmail.com	Vice President Matt Jones 0412345678 mj@1234.com
---	---



Settings and Configuration – AKA ‘God Cog’



NOTE: Depending on your level of access, different items will display in the pull-down list when you click on the **God Cog**.



23 There are three important common menu options across all levels are:

- User Management
- Member Record Types
- Audit Log

24 The association level has one major addition: **Settings** – providing a number of additional, and some common options, which appear in the God Cog list for states and associations.

25 These contain configurations that are important for setting up at state, association and club levels. The others are important managing the club.

User Management (state, association and club)

26 **User Management** provides additional administrator access to the Membership Database.

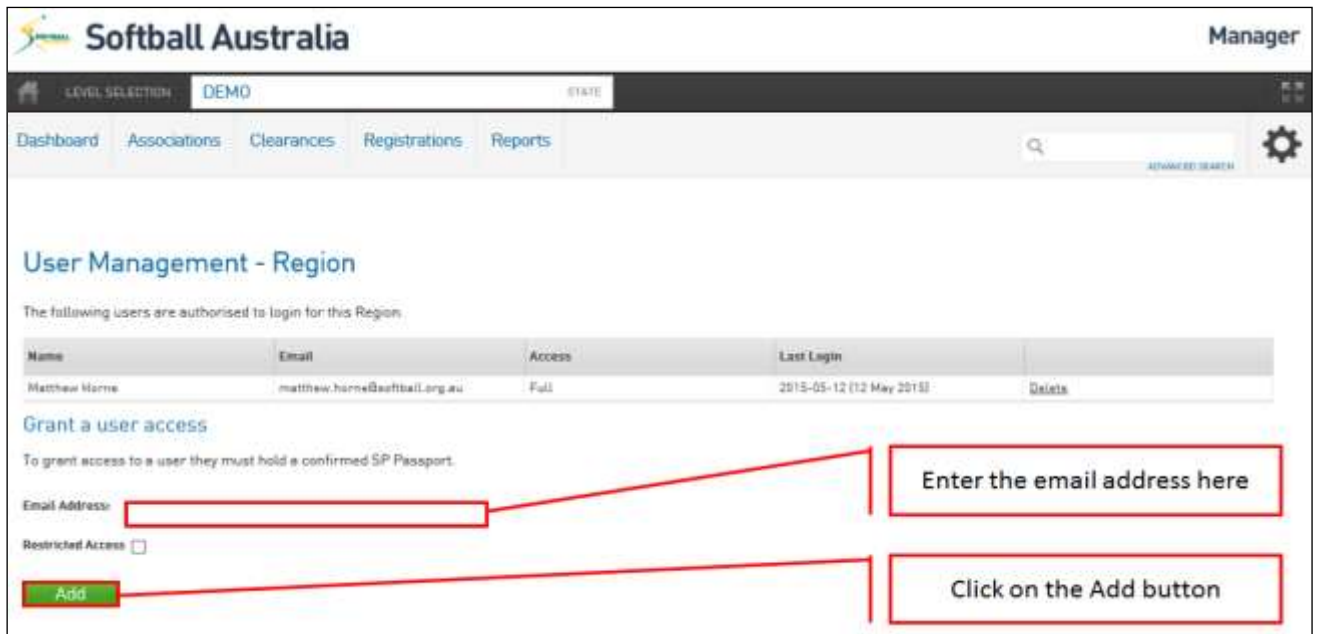


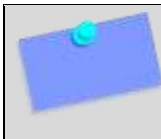
NOTE: Anyone requiring access must first register for a FSP PASSPORT and confirm their email address (see Module 1 A for details).

27 From the **God Cog** select **User Management**.



28 Enter the email that the applicant used to register for their passport. Click **Add**.



 **NOTE:** Restricted Access can be granted to a user which allows the ability to view, but not edit data. For more information about Restricted Access, see **Appendix A –Full list of Membership – Restricted Access**.



29 You should now see the new name listed with those who are authorised to login at that level.

Softball Australia Manager

LEVEL SELECTION: DEMO STATE

Dashboard Associations Clearances Registrations Reports

User Management - Region

The following users are authorised to login for this Region.

Name	Email	Access	Last Login	
Matthew Horne	matthew.horne@softball.org.au	Full	2015-05-12 11:2 May 2015	Delete

Grant a user access

To grant access to a user they must hold a confirmed SP Passport.

Email Address:

Restricted Access

Add

30 To remove access rights (eg an individual has resigned from their position on the committee, or moved to another state/association etc.), click on **User Management** under the **God Cog**, and select **Delete**.

NOTE: The individual's FSP Passport is still valid, but access rights to that site have been deleted.



Member Record Types for all organisations

31 Member Record Types are decided by, and set up in the Membership Database by Softball Australia (national body). Registrars at state, association and club level will be able to see those Types but are not required to do anything with regards setting them up.










32 To see the Member Records Types, click on **Member Record Types** in the **God Cog**.

The screenshot shows the 'Softball Australia Manager' interface. At the top, there's a navigation bar with 'LEVEL SELECTION' set to 'DEMO Association 1'. Below this is a menu with 'Dashboard', 'Members', 'Competitions', 'Clubs', 'Teams', 'Communications', 'Registrations', and 'Reports'. On the right, there's a search bar and a gear icon labeled 'Settings'. A dropdown menu is open, showing 'User Management', 'Member Record Types' (highlighted with a red box), and 'Audit Log'. Below the menu, there's a section for 'DEMO Association 1' with a logo and 'Details' link. To the right, there's a 'Contacts' section with 'President' and 'Vice President' information.

33 To view the details of the **Member Record Type**, click on . The fields are editable, so **please be careful**.

The screenshot shows the 'Member Record Types' page. It features a table with the following columns: 'Member Record Type', 'Parent Member Record Type', 'Parent Level', 'Parent Entity ID', and 'Notes'. The first row is highlighted with a red box.

Member Record Type	Parent Member Record Type	Parent Level	Parent Entity ID	Notes
 Fastpitch	Fastpitch	20	7581	
 Casual	Casual	20	7581	
 Masters	Masters	20	7581	
 Slowpitch	Slowpitch	20	7581	
 Off Diamond	Off Diamond	20	7581	
 Official	Official	20	7581	
 Tee Ball	Tee Ball	20	7581	

The screenshot shows the 'Member Record Type' details form. It has a 'Details' section with the following fields: 'Type Name' (Fastpitch), 'Parent Type' (Fastpitch), and 'Notes'. There is a green 'Submit' button at the bottom.

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Audit Logs

Date	Username	Section	Type
05/05/2015 17:14	Matthew Horne	User Management	Add
05/05/2015 17:14	Matthew Horne	User Management	Add
04/05/2015 14:04	Matthew Horne	Registration Form	Update Fields
30/04/2015 11:47	Matthew Horne	Field Options	Update
28/04/2015 09:17	Matthew Horne	Registration Form	Update Fields
27/04/2015 18:19	Katherine Bell	Field Options	Update
27/04/2015 18:18	Matthew Horne	Registration Form	Update Fields
27/04/2015 18:16	Katherine Bell	Registration Form	Update Fields
27/04/2015 18:14	Katherine Bell	Registration Form	Update Fields
27/04/2015 18:13	Katherine Bell	Registration Form	Update Fields
27/04/2015 18:13	Katherine Bell	Field Options	Update
27/04/2015 14:18	Matthew Horne	Registration Form	Update
27/04/2015 12:20	Matthew Horne	Registration Form	Update Fields
27/04/2015 12:16	Matthew Horne	Registration Form	Update Fields
27/04/2015 12:14	Matthew Horne	Registration Form	Update Fields
27/04/2015 12:11	Matthew Horne	Registration Form	Update Fields
27/04/2015 10:12	Katherine Bell	Registration Form	Update
27/04/2015 10:01	Katherine Bell	Age Groups	Update
27/04/2015 09:57	Katherine Bell	Age Groups	Add
26/04/2015 15:20	Matthew Horne	Registration Form	Update Fields

- 34 **Audit Logs** allow you to see who has been active in the database at the level you've selected Audit Logs from. These records are time and date stamped, and indicate the **Type** of work conducted (eg Add, Update Fields etc).

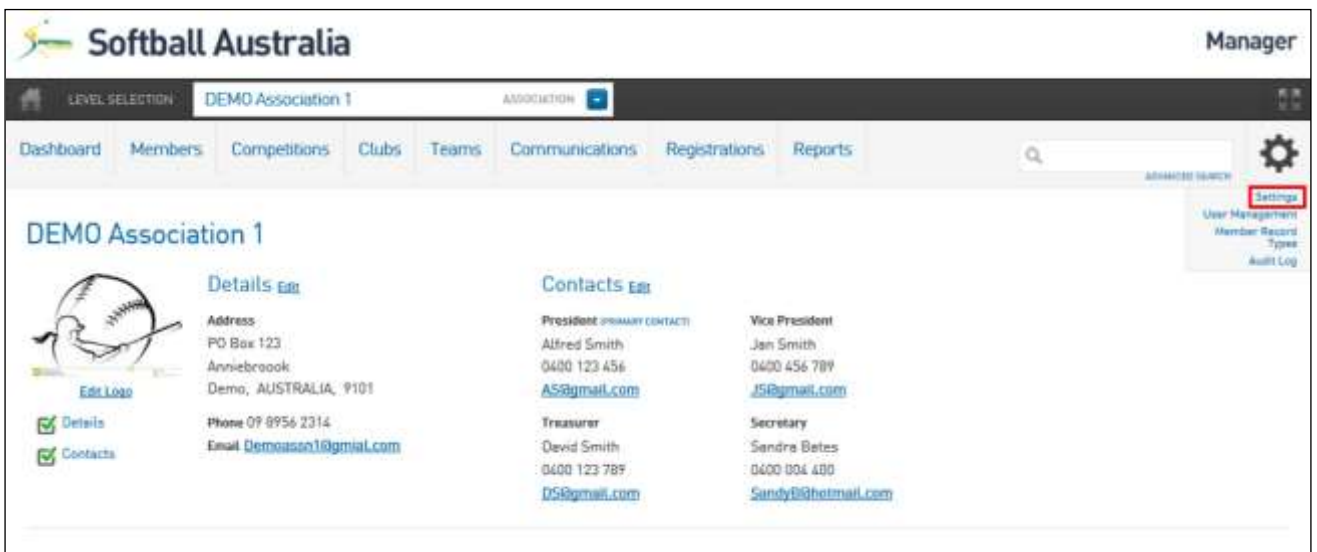




Settings – association only

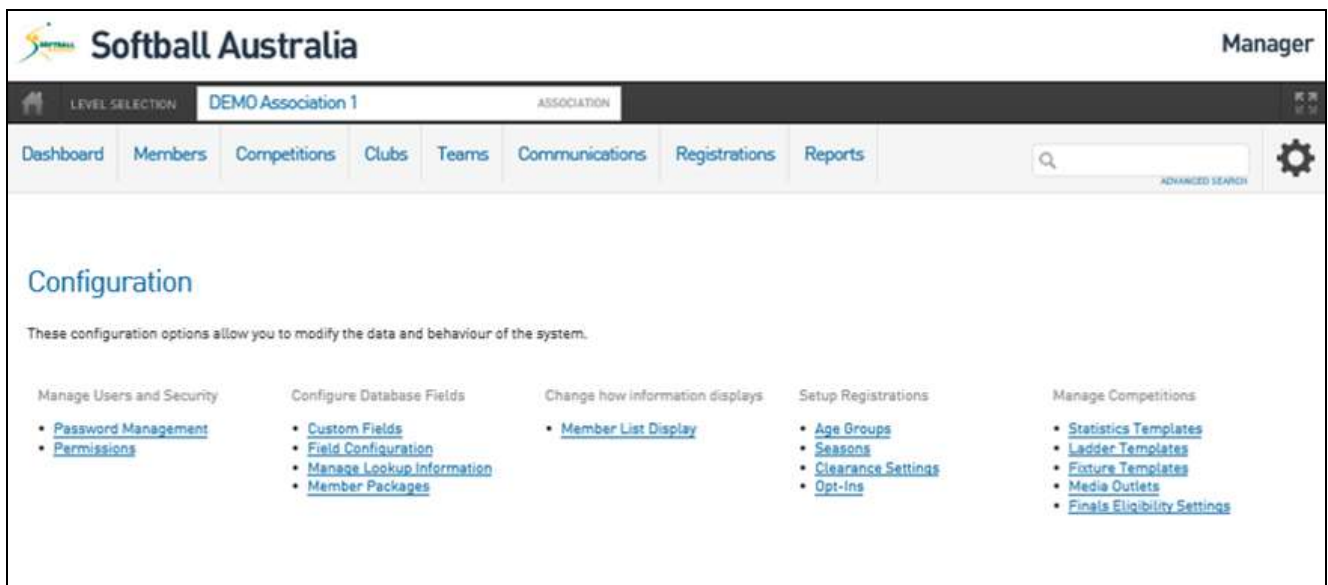
35 **Settings** is one of the most important areas at an association level. It provides the registrar with a great deal of control over how they modify the data and behaviour of the system.

36 To access configuration, click on **Settings**.



The screenshot shows the 'Softball Australia Manager' interface for 'DEMO Association 1'. The 'Settings' gear icon in the top right is highlighted with a red box. A dropdown menu is visible, listing 'Settings', 'User Management', 'Member Record Types', and 'Audit Log'.

37 There are 12 configurations in five groups.



The screenshot shows the 'Configuration' page in the 'Softball Australia Manager' interface. It lists 12 configuration options grouped into five categories:

- Manage Users and Security**
 - [Password Management](#)
 - [Permissions](#)
- Configure Database Fields**
 - [Custom Fields](#)
 - [Field Configuration](#)
 - [Manage Lookup Information](#)
 - [Member Packages](#)
- Change how information displays**
 - [Member List Display](#)
- Setup Registrations**
 - [Age Groups](#)
 - [Seasons](#)
 - [Clearance Settings](#)
 - [Opt-ins](#)
- Manage Competitions**
 - [Statistics Templates](#)
 - [Ladder Templates](#)
 - [Fixture Templates](#)
 - [Media Outlets](#)
 - [Finals Eligibility Settings](#)

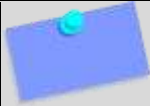




Password Management

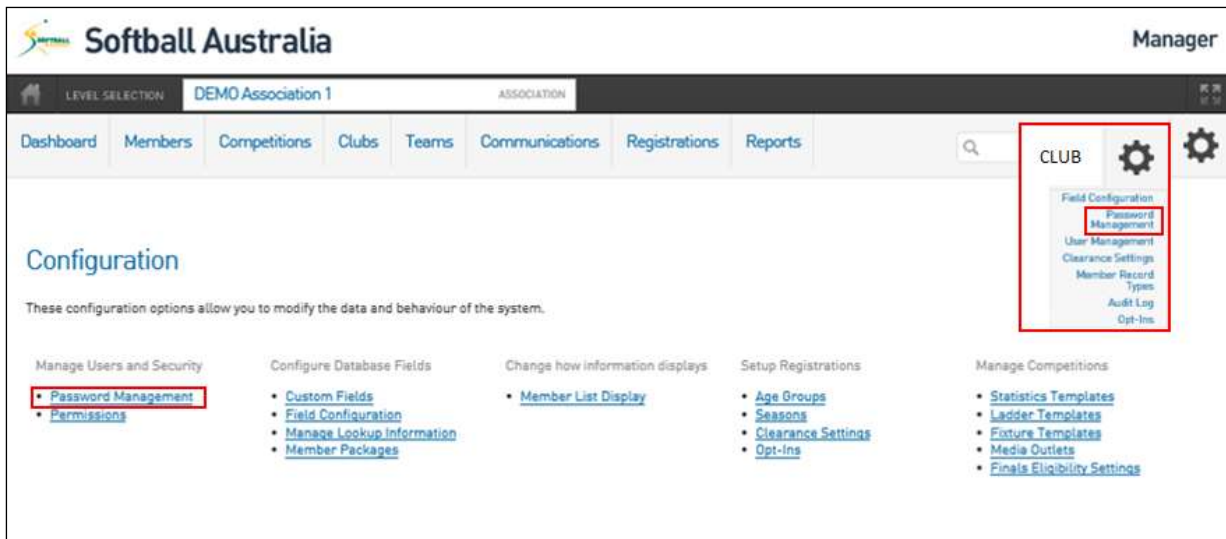
38 **Password Management** allows administrators to create or reset passwords for all levels below:

- associations can manage their clubs/teams/members passwords
- clubs can manage their teams/members passwords
- Usernames/codes cannot be edited



NOTE: passwords are used by teams and individuals to login and complete a Registration Form to register as a player to a club/team, or as a team to a competition for a given season.

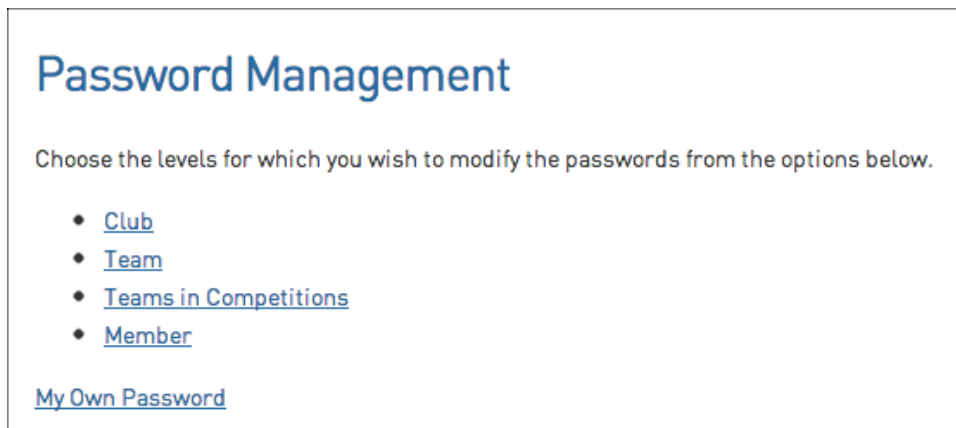
39 Click on [Password Management](#).



The screenshot shows the 'Softball Australia Manager' interface. The top navigation bar includes 'Dashboard', 'Members', 'Competitions', 'Clubs', 'Teams', 'Communications', 'Registrations', and 'Reports'. A search bar and a 'CLUB' dropdown menu are also visible. The 'CLUB' dropdown menu is open, showing options like 'Field Configuration', 'Password Management', 'User Management', 'Clearance Settings', 'Member Record Types', 'Audit Log', and 'Opt-Ins'. The 'Password Management' option is highlighted with a red box. Below the navigation bar, the 'Configuration' section is displayed, with 'Manage Users and Security' containing 'Password Management' and 'Permissions', both highlighted with red boxes.

40 Associations and clubs will see the following screen (clubs will not see the **Club** option):

41 Select the level at which you want to change the password.



The screenshot shows the 'Password Management' screen. The title 'Password Management' is displayed in large blue text. Below the title, the text reads: 'Choose the levels for which you wish to modify the passwords from the options below.' There are four bullet points with links: 'Club', 'Team', 'Teams in Competitions', and 'Member'. At the bottom, there is a link for 'My Own Password'.

- 42 The clubs/teams/members (depending on your selection) are listed alphabetically. Find the relevant club, team or member and view or change their password.

Password Management

In order to update an existing password please enter the new password against the appropriate username. Only the passwords where a new password is entered will be updated. If you wish to only provide read only access to a user then check the 'Read Only' check box and this will provide the user limited access to the database. By pressing "Automatically Generate Passwords" passwords will be generated and saved for all Members who currently have blank passwords. After you have finished modifying the passwords you must press the "Update Passwords" button to save your changes.

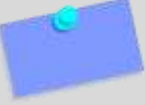
Update Passwords:

Club Passwords:

Name	Username/Code	Password	New Password	Read Only
Club 1	3	No Password Set	<input type="text"/>	<input type="checkbox"/>
Club 2	3	No Password Set	<input type="text"/>	<input type="checkbox"/>
Club 3	3	No Password Set	<input type="text"/>	<input type="checkbox"/>
DEMO Association 1 CLUB	3	No Password Set	<input type="text"/>	<input type="checkbox"/>

Update Passwords:

- 43 You can automatically assign passwords by clicking on **Automatically Generate Passwords**. The password fields will be populated with a random combination of letters and numbers for records that don't already have a password (it will not over-write existing passwords).
- 44 If you are obtaining a password for a club or team administrator, take note of the relevant password and send it on to the administrator.
- 45 Click on **Update Passwords** to save any changes.



NOTE: for security reasons, passwords are not visible within the system. They can be emailed to members from a Registration Form, and administrators can reset passwords, if required (as per the above process).

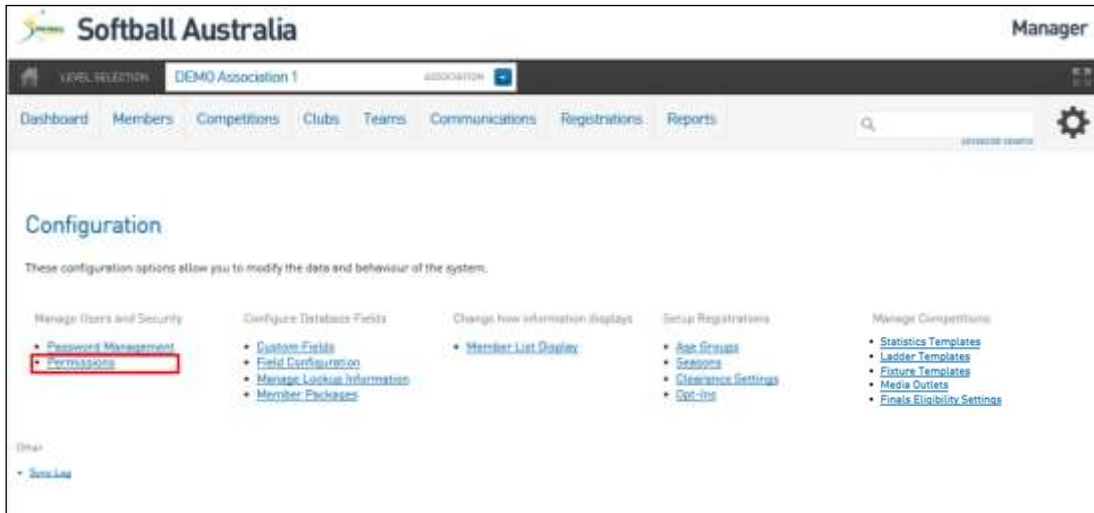




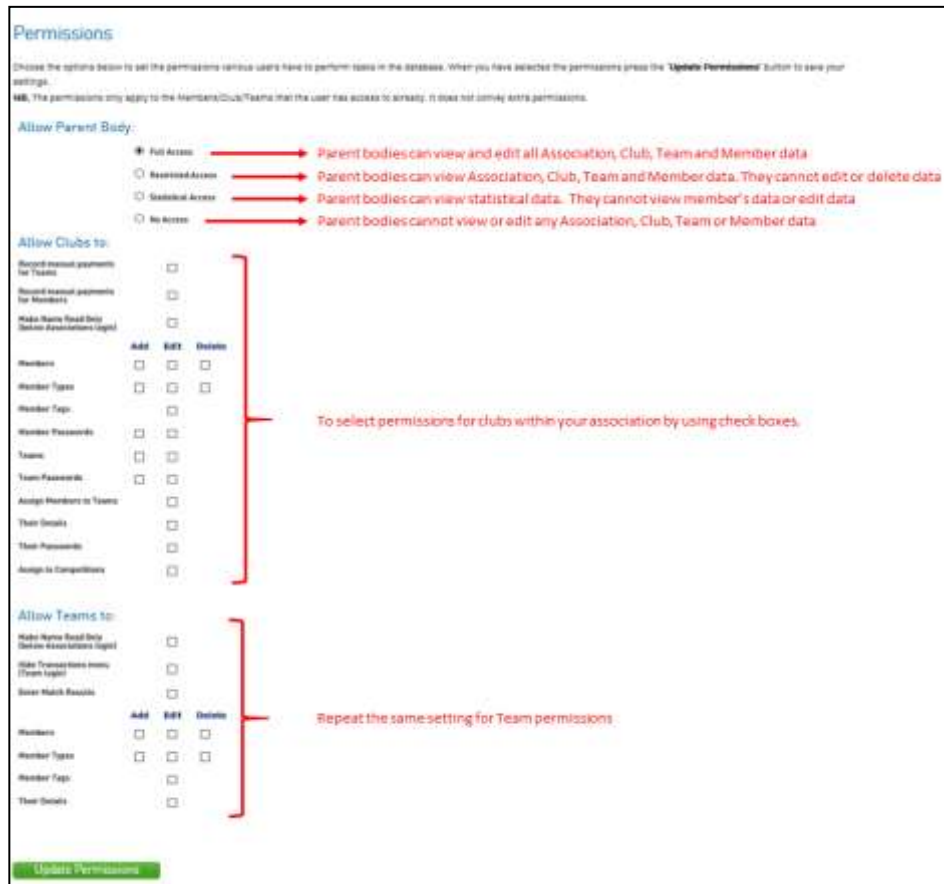
Permissions

46 **Permissions** allow an association to set restrictions available to clubs, teams and members when they sign into the Membership Database.

47



48 Click on [Permissions](#).



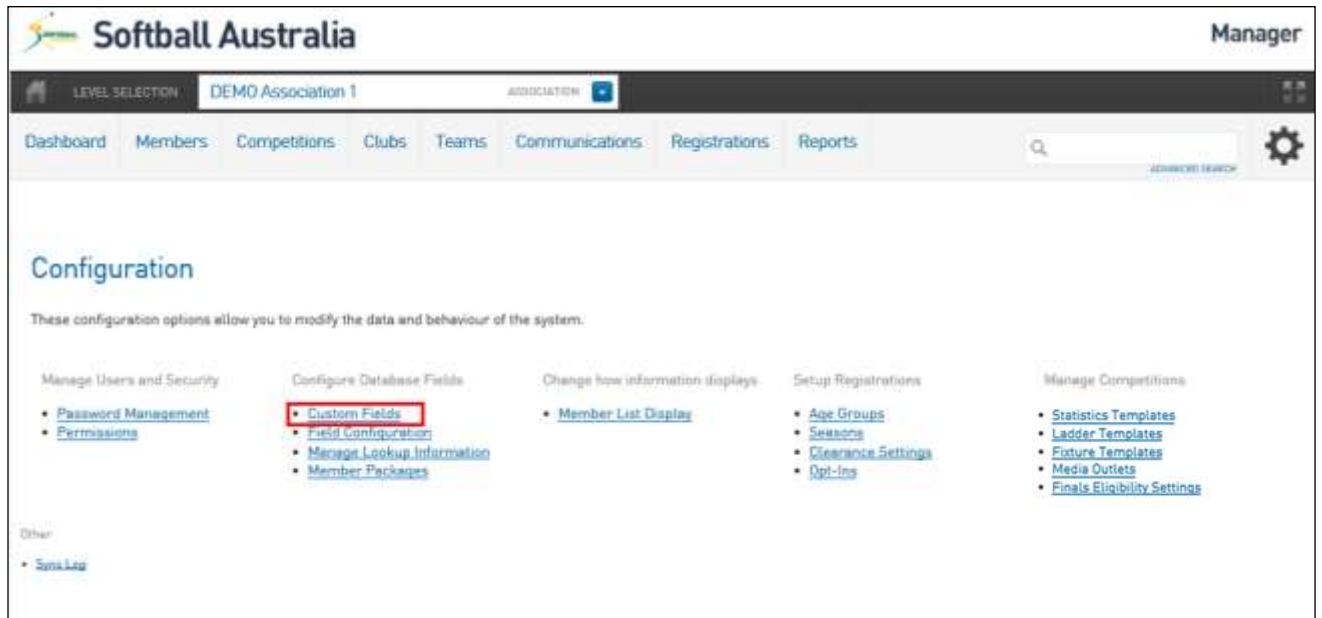
49 Click [Update Permissions](#).



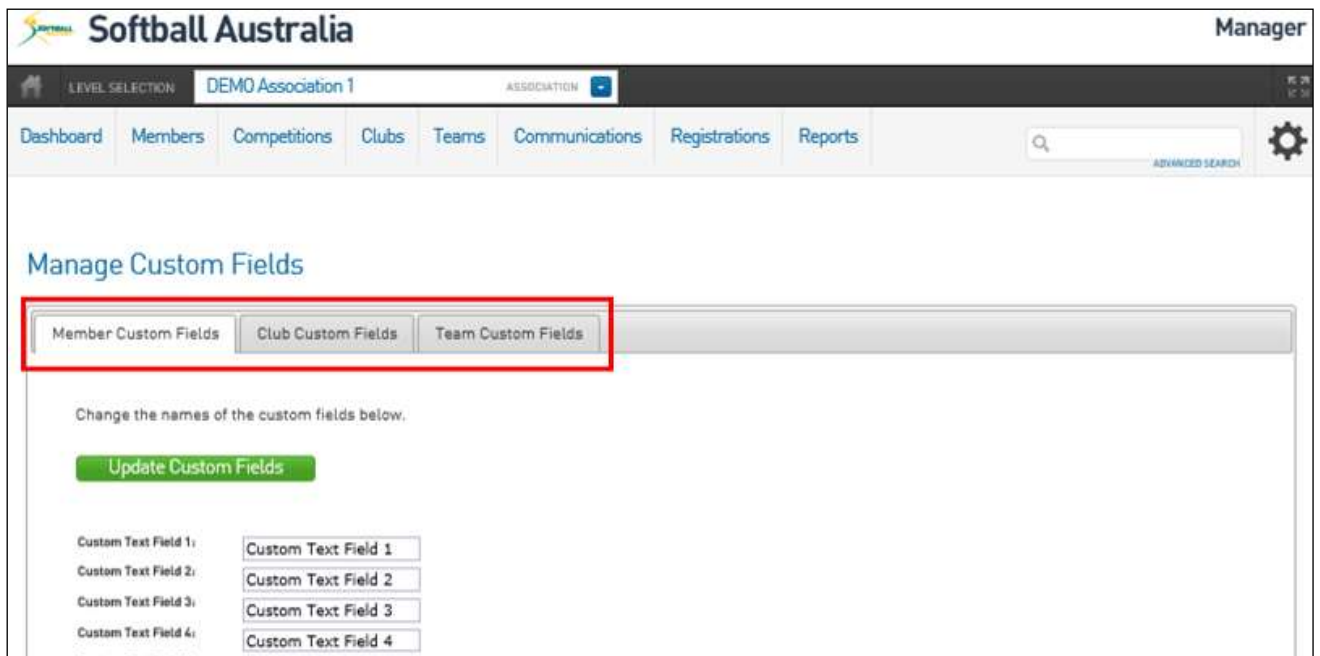


Custom Fields

- 50 There are a wide range of fields already available, however should you want to use fields that are not already in the database, you can set them up yourself using 'custom fields'.



- 51 Click on [Custom Fields](#).



- 52 Click on the appropriate tab for members, clubs or teams.

- 53 For those fields that just require Text, Number, Date, or checkbox responses, insert a relevant description.

Custom Text Field 1	<p>Enter an appropriate description for the information you are after. ie. Shoe size, Date last played, Available for Umpiring?...etc.</p>
Custom Number Field 1	
Custom Date Field 1	
Custom Checkbox Field 1	
Custom Member Notes 1	

- 54 For customised lookup data click on [Manage](#) to the right of the Custom Lookup and you will see the following window.



- 55 Click on [ADD A NEW OPTION](#) and type in your first Lookup Option. Click [Update](#).

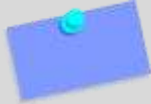


- 56 Repeat until you have finished creating your Lookup list. Click [Update](#).



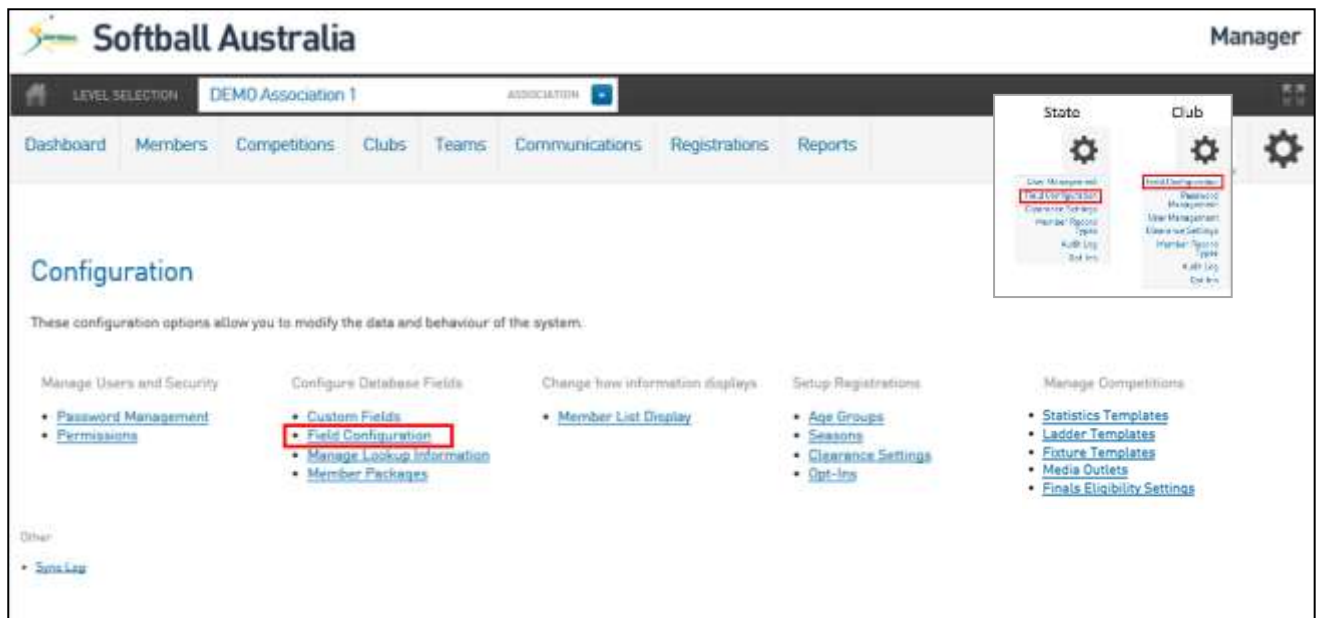


Field Configuration



NOTE: The national body has defined a number of mandatory fields (eg name, email address, phone number). These fields will determine the data collected about our membership, which is vital for administration, planning, funding and research purposes.

- 57 **Field Configuration** allows associations to select the fields they want to use for members, clubs and teams. By 'fields' we mean the information you want to collect (eg middle name, maiden name, preferred name).
- 58 Setting up the fields is an important first step. If it is the association's responsibility to configure the fields, this should be done before providing login access to clubs and teams.



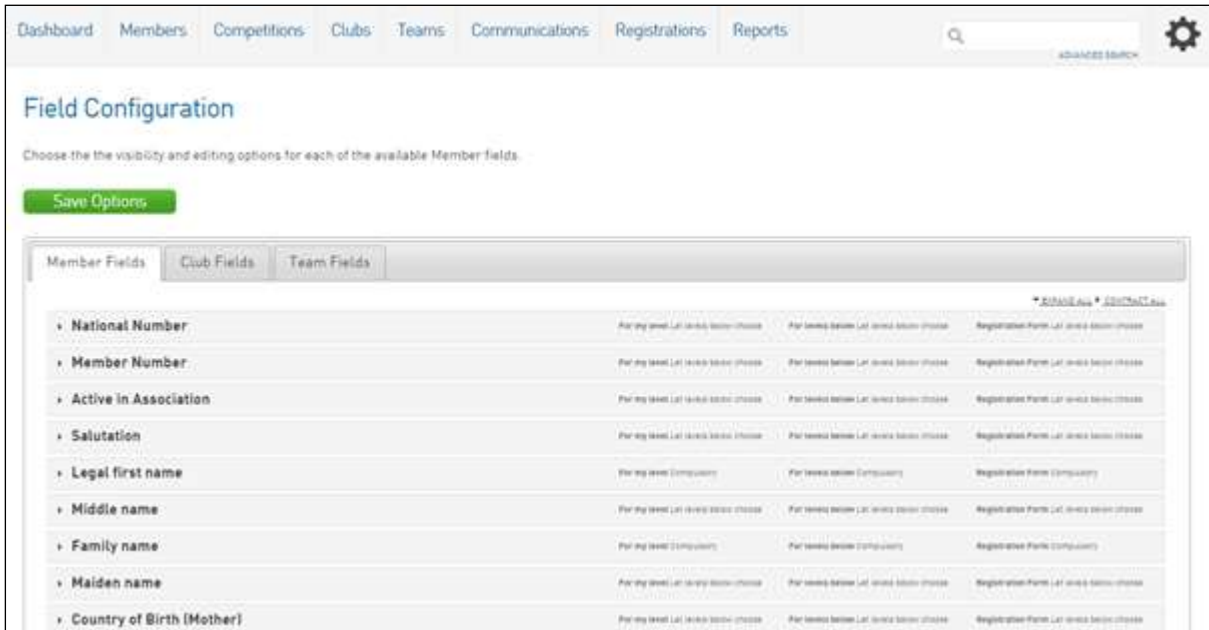
The screenshot shows the 'Softball Australia Manager' interface. At the top, there is a navigation bar with 'LEVEL SELECTION' set to 'DEMO Association 1' and 'ASSOCIATION' set to 'DEMO Association 1'. Below this is a menu with options: Dashboard, Members, Competitions, Clubs, Teams, Communications, Registrations, and Reports. The main content area is titled 'Configuration' and contains the text: 'These configuration options allow you to modify the data and behaviour of the system.' There are five main categories of configuration options:

- Manage Users and Security:** Password Management, Permissions.
- Configure Database Fields:** Custom Fields, **Field Configuration** (highlighted in red), Manage Lookup Information, Member Packages.
- Change how information displays:** Member List Display.
- Setup Registrations:** Age Groups, Seasons, Clearance Settings, Opt-In.
- Manage Competitions:** Statistics Templates, Ladder Templates, Fixture Templates, Media Outlets, Finals Eligibility Settings.

There is also an 'Other' section with 'Sms Log'. On the right side, there are two dropdown menus for 'State' and 'Club', each with a gear icon and a list of options. The 'Field Configuration' option is also highlighted in red in the 'Club' dropdown menu.

- 59 Click on **Field Configuration**.

60 You will see a list of fields that are available to use. Scroll down the list to get an understanding of the types of fields available.

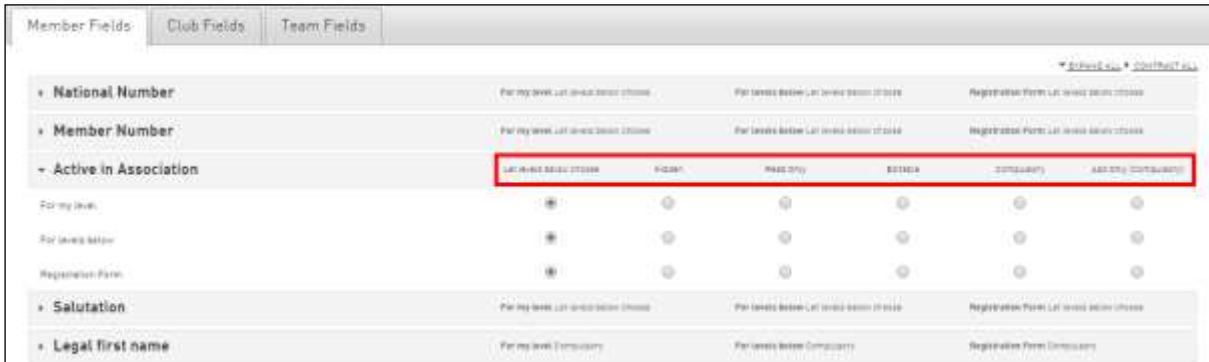


61 To see the options for an individual field, click on the arrow to the left of the field name. This will expand a range of options as to how the field can be used:

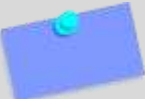


For my level	Field setting selected will be applicable to association administrators, ie if you login at association level, these field settings will apply.
For levels below	Field setting selected will be applicable to club and team administrators, ie if you login at club or team level, these field settings will apply.
Registration Form	Field settings selected will appear on the Registration Form.

62 Across the top are six field settings:



Let all levels below choose	By selecting this option, the club or team will have control over the field setting, ie whether they want it to be editable, compulsory, read-only, etc.
Hidden	The field will not be able to be viewed by the club or team
Read Only	The field can be viewed by the club or team but not edited
Editable	The field can be viewed and edited by the club or team
Compulsory	It is mandatory for the field to be completed by the club or team. The field is editable, ie it can be changed at any time
Add Only (Compulsory)	It is mandatory for the field to be completed by the club or team, but once it is saved, it cannot be changed.

 **NOTE:** By default, each field is set to 'Let levels below choose' until you change the setting.

63 Select the field setting you wish to apply to each level (ie your level, levels below and/or the Registration form) and click **Save Options**.

Tip 1



64 To open the options for all fields, click on [EXPAND ALL](#).

Hidden	Read Only	Editable	Compulsory	Add Only (Compulsory)
	<input checked="" type="radio"/>			
	<input checked="" type="radio"/>			
	<input checked="" type="radio"/>			
Hidden	Read Only	Editable	Compulsory	Add Only (Compulsory)
<input checked="" type="radio"/>				
<input checked="" type="radio"/>				
<input checked="" type="radio"/>				
Hidden	Read Only	Editable	Compulsory	Add Only (Compulsory)
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

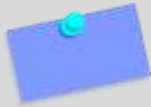
		EXPAND ALL CONTRACT ALL
For my level Read Only	For levels below Read Only	Registration Form Read Only
For my level Hidden	For levels below Hidden	Registration Form Hidden
For my level Let levels below choose	For levels below Let levels below choose	Registration Form Let levels below choose
For my level Editable	For levels below Editable	Registration Form Let levels below choose
For my level Compulsory	For levels below Compulsory	Registration Form Compulsory
For my level Let levels below choose	For levels below Let levels below choose	Registration Form Let levels below choose

65 To close all field options, click on [CONTRACT ALL](#).



Tip 2

66 If there are other fields you wish to use that are not listed, you can set up your own **Custom Fields**.

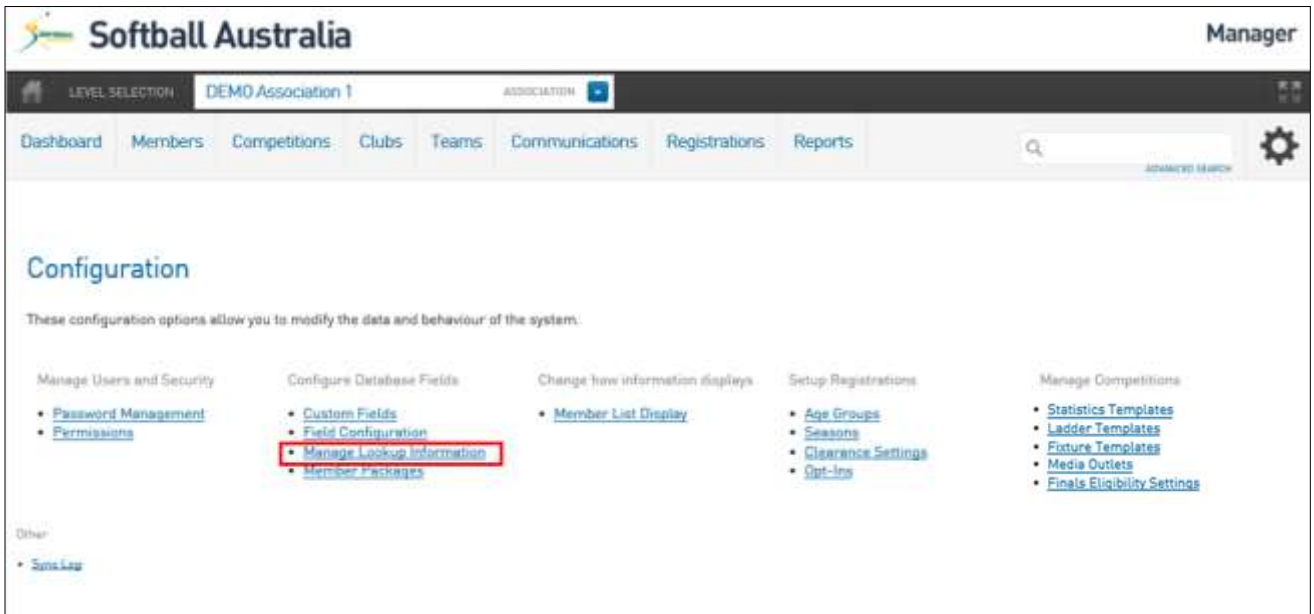


NOTE: The **Field Configuration** options available will differ depending on your level at which you are logged in. If a field that you need is not available to view or edit, you will need to contact the body at the level above you in the database (eg the association if you are a club or the national body if you are an association) and request that the field is made available to your level.



Manage Lookup Information

67 **Manage Lookup Information** is similar to the **Configuration – Custom Fields – Manage Custom Lookup** with one key difference being there are a number of fields that are 'set' (ie Accreditation Courses, Accreditation Status, Tribunal outcomes etc), that you can define via a lookup list.



The screenshot shows the 'Softball Australia Manager' interface. The top navigation bar includes 'LEVEL SELECTION' with 'DEMO Association 1' selected, and 'ASSOCIATION' with a dropdown arrow. Below this is a menu with 'Dashboard', 'Members', 'Competitions', 'Clubs', 'Teams', 'Communications', 'Registrations', and 'Reports'. A search bar and a gear icon are on the right. The main content area is titled 'Configuration' and contains the text: 'These configuration options allow you to modify the data and behaviour of the system.' Below this, there are five columns of configuration options:

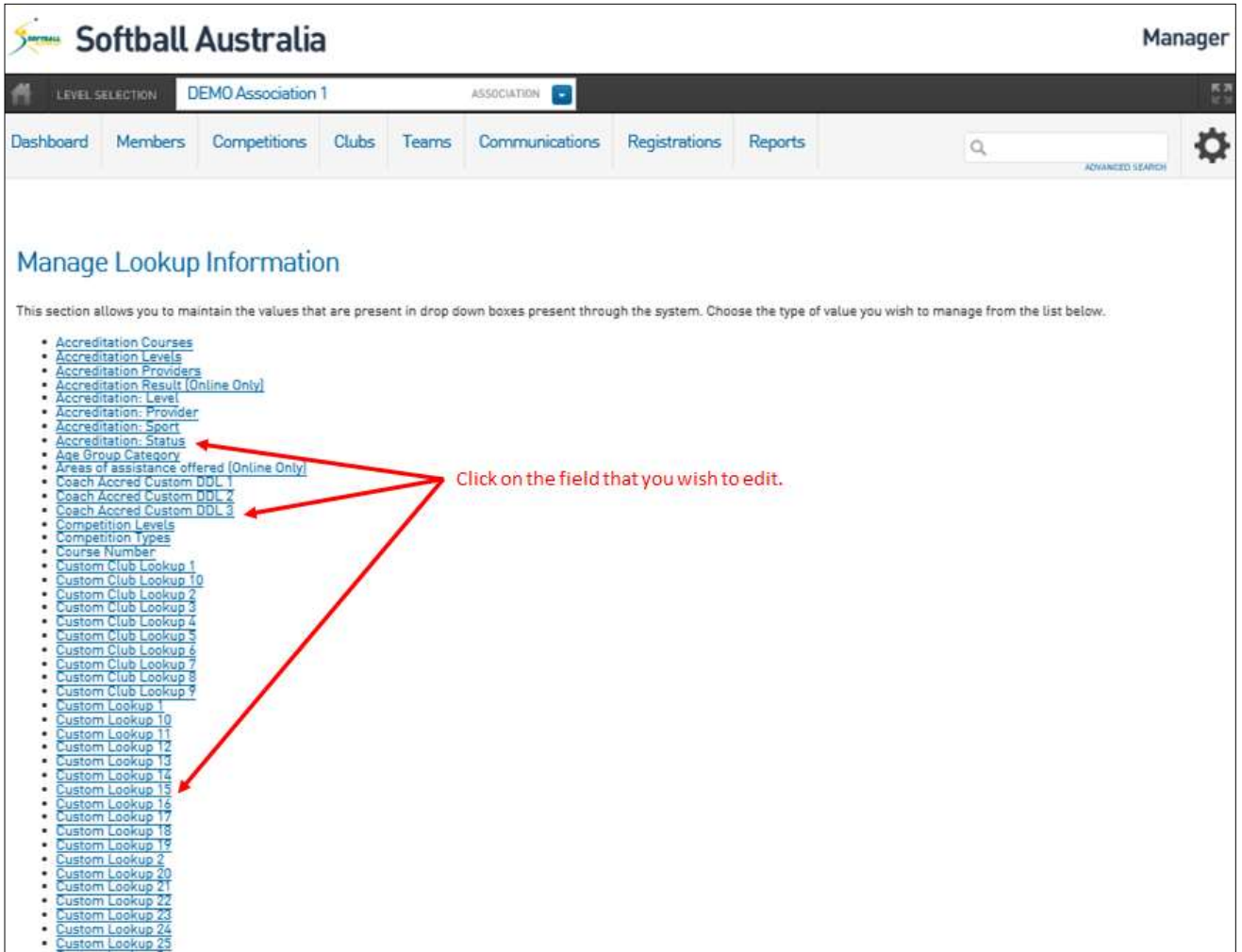
- Manage Users and Security**
 - [Password Management](#)
 - [Permissions](#)
- Configure Database Fields**
 - [Custom Fields](#)
 - [Field Configuration](#)
 - [Manage Lookup Information](#) (highlighted with a red box)
 - [Member Packages](#)
- Change how information displays**
 - [Member List Display](#)
- Setup Registrations**
 - [Age Groups](#)
 - [Seasons](#)
 - [Clearance Settings](#)
 - [Opt-Ins](#)
- Manage Competitions**
 - [Statistics Templates](#)
 - [Ladder Templates](#)
 - [Fixture Templates](#)
 - [Media Outlets](#)
 - [Finals Eligibility Settings](#)

At the bottom, there is an 'Other' section with a link to [Sms-Log](#).

68 The process is exactly the same as **Manage Custom Lookup** fields.

69 Click [Manage Lookup Information](#).

70 Select the field you wish to edit.



Softball Australia Manager

LEVEL SELECTION: DEMO Association 1 ASSOCIATION

Dashboard Members Competitions Clubs Teams Communications Registrations Reports

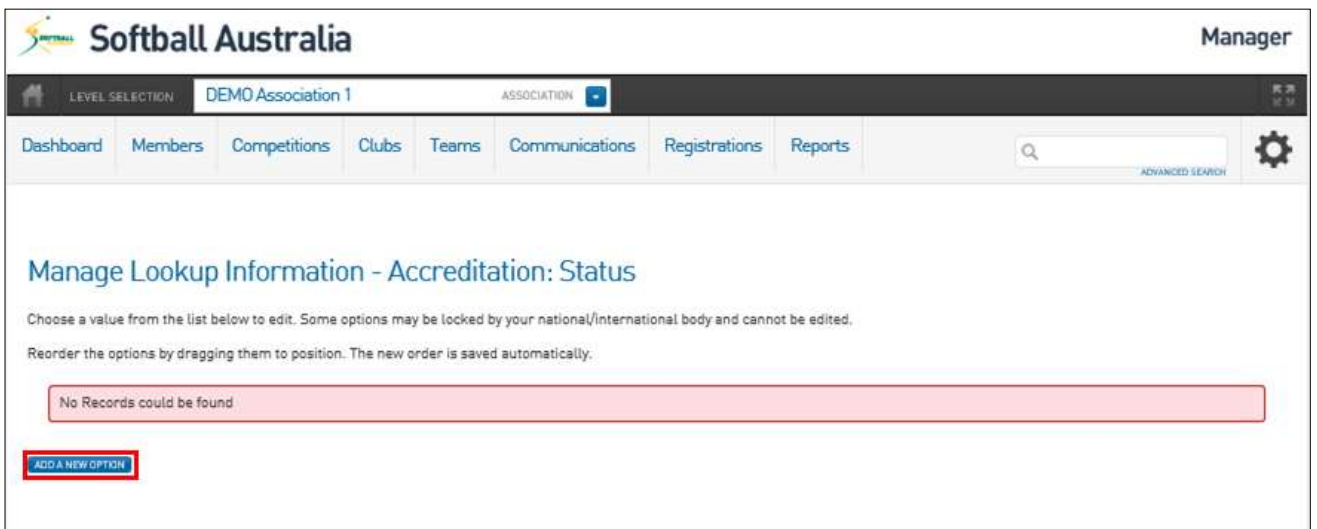
Manage Lookup Information

This section allows you to maintain the values that are present in drop down boxes present through the system. Choose the type of value you wish to manage from the list below.

- [Accreditation Courses](#)
- [Accreditation Levels](#)
- [Accreditation Providers](#)
- [Accreditation Result \(Online Only\)](#)
- [Accreditation: Level](#)
- [Accreditation: Provider](#)
- [Accreditation: Sport](#)
- [Accreditation: Status](#)
- [Age Group Category](#)
- [Areas of assistance offered \(Online Only\)](#)
- [Coach Accred Custom DDL 1](#)
- [Coach Accred Custom DDL 2](#)
- [Coach Accred Custom DDL 3](#)
- [Competition Levels](#)
- [Competition Types](#)
- [Course Number](#)
- [Custom Club Lookup 1](#)
- [Custom Club Lookup 10](#)
- [Custom Club Lookup 2](#)
- [Custom Club Lookup 3](#)
- [Custom Club Lookup 4](#)
- [Custom Club Lookup 5](#)
- [Custom Club Lookup 6](#)
- [Custom Club Lookup 7](#)
- [Custom Club Lookup 8](#)
- [Custom Club Lookup 9](#)
- [Custom Lookup 1](#)
- [Custom Lookup 10](#)
- [Custom Lookup 11](#)
- [Custom Lookup 12](#)
- [Custom Lookup 13](#)
- [Custom Lookup 14](#)
- [Custom Lookup 15](#)
- [Custom Lookup 16](#)
- [Custom Lookup 17](#)
- [Custom Lookup 18](#)
- [Custom Lookup 19](#)
- [Custom Lookup 2](#)
- [Custom Lookup 20](#)
- [Custom Lookup 21](#)
- [Custom Lookup 22](#)
- [Custom Lookup 23](#)
- [Custom Lookup 24](#)
- [Custom Lookup 25](#)

Click on the field that you wish to edit.

71 Click on **ADD A NEW OPTION**.



Softball Australia Manager

LEVEL SELECTION: DEMO Association 1 ASSOCIATION

Dashboard Members Competitions Clubs Teams Communications Registrations Reports

Manage Lookup Information - Accreditation: Status

Choose a value from the list below to edit. Some options may be locked by your national/international body and cannot be edited.

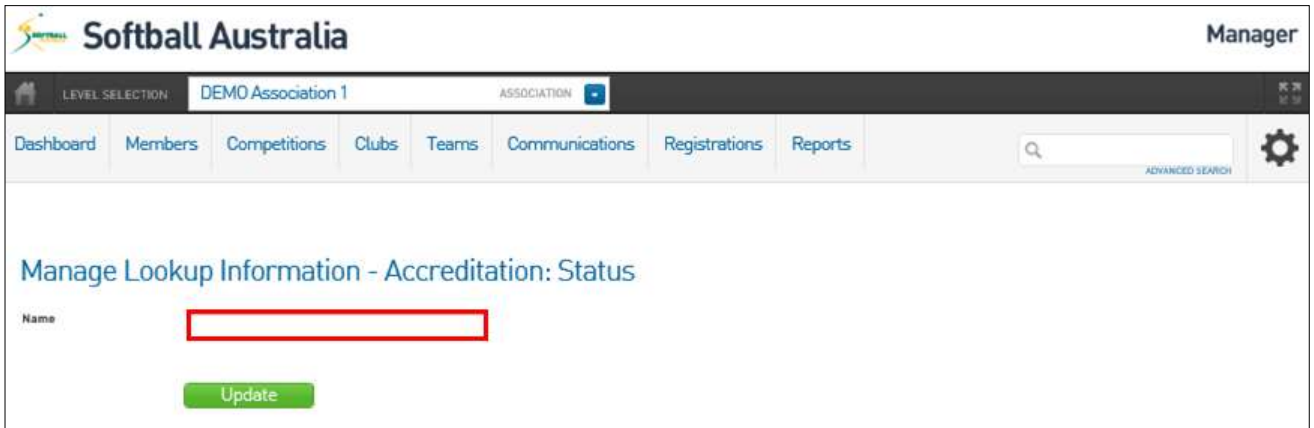
Reorder the options by dragging them to position. The new order is saved automatically.

No Records could be found

ADD A NEW OPTION



72 Type in your first Lookup Option. Click **Update**.

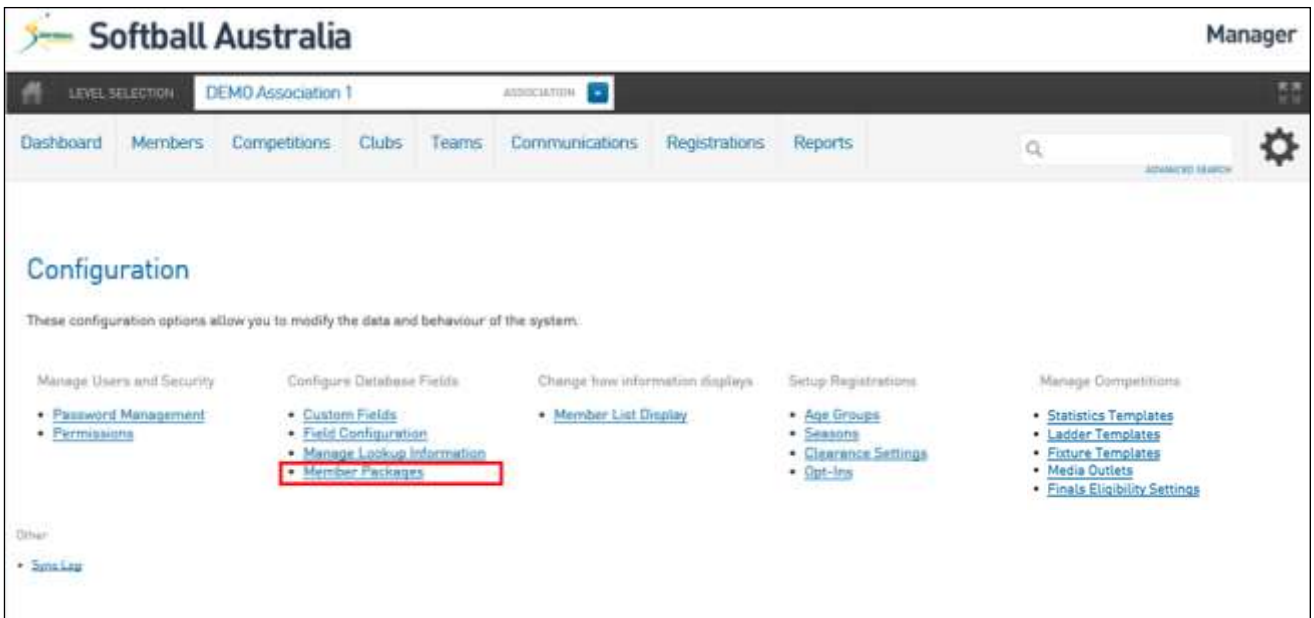


73 Repeat the previous step until you have finished creating your Lookup List. Click **Update**.



Member Packages

74 **Member Packages** are purely a lookup field that can be added to the member level of the database. Member Packages are not linked with Products or Registration Forms, whereas Products are.



75 **Member Packages** are updated exactly the same way as **Manage Custom Lookup** fields.

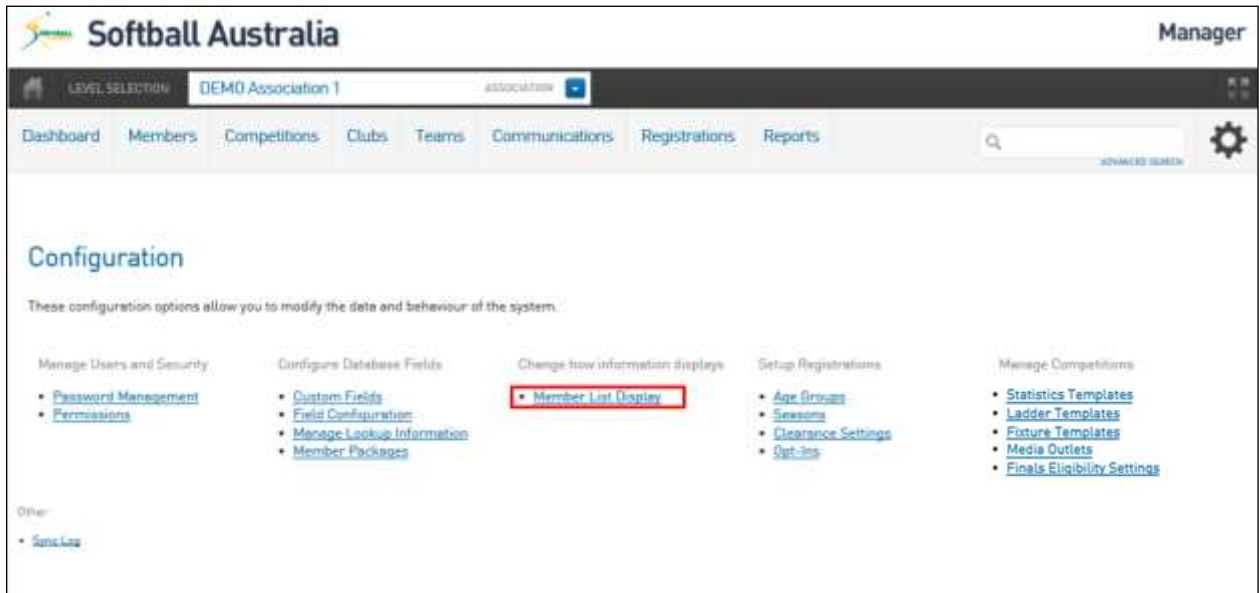
76 Click **Add a New Package**, type in the package name and then click **Update**. Continue doing this until you have the list of packages you require.





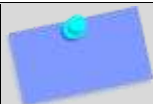
Member List Display

77 **Member List** allows you to choose how you wish to display member information.



78 Click on [Member List Display](#).

79 Select the field you wish to add to the display and drag it across from **Available Fields** to **Selected Fields**.



NOTE: The dark horizontal line indicates where the field will be placed when you release the mouse button.

80 To remove fields, do the opposite. Select the field you wish to remove from **Selected Fields** and drag it back to Available Fields. It will automatically list alphabetically in **Available Fields**.

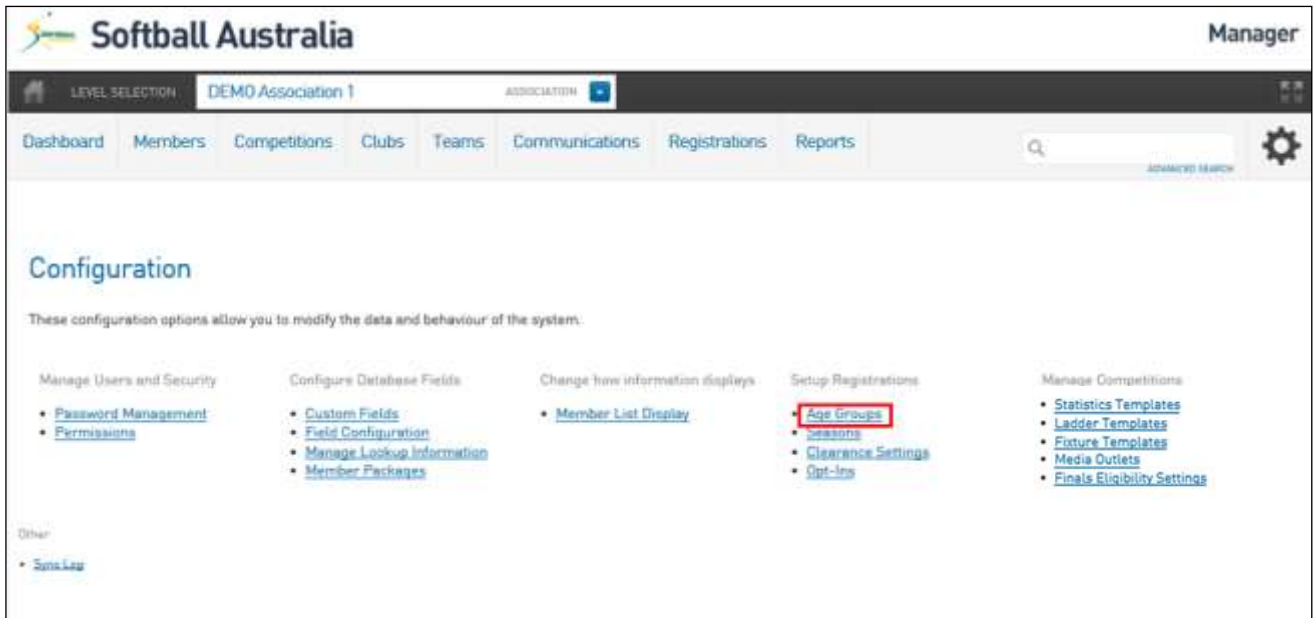




Age Groups

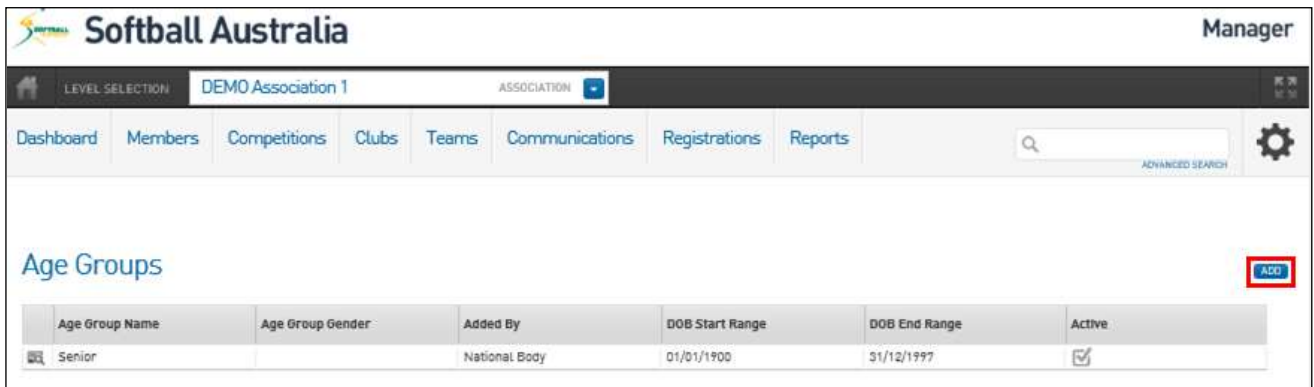
- 81 **Age Groups** can be assigned to members and competitions to assist with data organisation and management, and historical reporting. **Age Groups** can either be added and managed by associations or controlled by the national body.
- 82 Softball Australia will define three age groups in line with the new Member Types:

Senior	aged 18 years and older as at December 31 in the year the season commences
Junior	aged 17 years or younger as at December 31 in the year the season commences
Sub-Junior	aged 12 years or younger as at December 31 in the year the season commences



The screenshot shows the 'Softball Australia Manager' interface. The top navigation bar includes 'LEVEL SELECTION' (DEMO Association 1) and 'ASSOCIATION'. Below this is a menu with 'Dashboard', 'Members', 'Competitions', 'Clubs', 'Teams', 'Communications', 'Registrations', and 'Reports'. The main content area is titled 'Configuration' and contains several categories of settings: 'Manage Users and Security' (Password Management, Permissions), 'Configure Database Fields' (Custom Fields, Field Configuration, Manage Lookup Information, Member Packages), 'Change how information displays' (Member List Display), 'Setup Registrations' (Age Groups, Seasons, Clearance Settings, Opt-ins), and 'Manage Competitions' (Statistics Templates, Ladder Templates, Fixture Templates, Media Outlets, Finals Eligibility Settings). The 'Age Groups' link is highlighted with a red box.


- 83 If you wish to add a new **Age Group**, click **ADD**.



The screenshot shows the 'Softball Australia Manager' interface with the 'Age Groups' section selected. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'Age Groups' and features a table with the following columns: 'Age Group Name', 'Age Group Gender', 'Added By', 'DOB Start Range', 'DOB End Range', and 'Active'. A red box highlights the 'ADD' button in the top right corner of the section. The table contains one entry: 'Senior' with 'National Body' as the added by, '01/01/1900' as the DOB start range, '31/12/1997' as the DOB end range, and a checked 'Active' checkbox.

- 84 The **Add New Age Group** screen will appear. **Type the name** of the Age Group in the **Age Group Name** field.

- 85 **Enter the Date of Birth (DOB) range** for the age group. For example, if the Age Group is 30 - 39 year olds for the 2015 season, the DOB start date will be 1 January 1976 and the DOB end date will be 31 Jan 1985. All members registered to the 2015 season (manually by the administrator or via the online registration form) with a date of birth within this date range will be automatically allocated to the 30 - 39 age group.



The screenshot shows the 'Softball Australia Manager' interface. The top navigation bar includes 'Dashboard', 'Members', 'Competitions', 'Clubs', 'Teams', 'Communications', 'Registrations', and 'Reports'. The main content area is titled 'Add New Age Group' and contains the following fields:

- Age Group Name:** A text input field with a red asterisk indicating it is compulsory.
- Date of Birth Start Range:** Three dropdown menus for Day, Month, and Year, with a red asterisk. A note below reads: 'Older end of Date Range (eg 01 - Jan - 1970)'. The 'Year' dropdown is currently set to 1970.
- Date of Birth End Range:** Three dropdown menus for Day, Month, and Year, with a red asterisk. A note below reads: 'Younger end of Date Range (eg 31 - Dec - 2000)'. The 'Year' dropdown is currently set to 2000.
- Gender:** A dropdown menu with a red asterisk. The options are Female, Male, Mixed, and None Specified. 'Female' is currently selected.
- Age Group Active:** A checkbox field.

At the bottom of the form is a green 'Update Age Group' button and a link: 'Click here to return to list of Age Groups'.

- 86 **Select a gender** from the **Gender** drop-down list (compulsory).



- 87 To edit **Age Groups**, click on the magnifying glass icon to the left of the **Age Group Name**.
- 88 A 'Details' screen will open for that Age Group. Make the required changes and click on **Update Age Group**.
- 89 A confirmation message will appear - **Record Updated Successfully**. Click on [Click here](#) to return to the list of **Age Groups**.

Softball Australia Manager

LEVEL SELECTION DEMO Association 1 ASSOCIATION

Dashboard Members Competitions Clubs Teams Communications Registrations Reports

Age Group - Senior

To modify this information change the information in the boxes below and when you have finished press the 'Update Age Group' button.
Note: All boxes marked with a are compulsory and must be filled in.

Age Group Details

Age Group Name: Senior

Date of Birth Start Range: 1 Jan 1900 Older end of Date Range (eg 01 - Jan - 1970)

Date of Birth End Range.: 31 Dec 1997 Younger end of Date Range (eg 31 - Dec - 2000)

Gender: None Specified

Age Group Active:

Update Age Group

[Click here](#) to return to list of Age Groups

Softball Australia Manager

LEVEL SELECTION DEMO Association 1 ASSOCIATION

Dashboard Members Competitions Clubs Teams Communications Registrations Reports

Age Groups

Age Group Name	Age Group Gender	Added By	DOB Start Range	DOB End Range	Active
Senior		National Body	01/01/1900	31/12/1997	<input checked="" type="checkbox"/>

NOTE: If you wish to De-Activate an Age Group, check the **Age Group Active** box, indicated above.

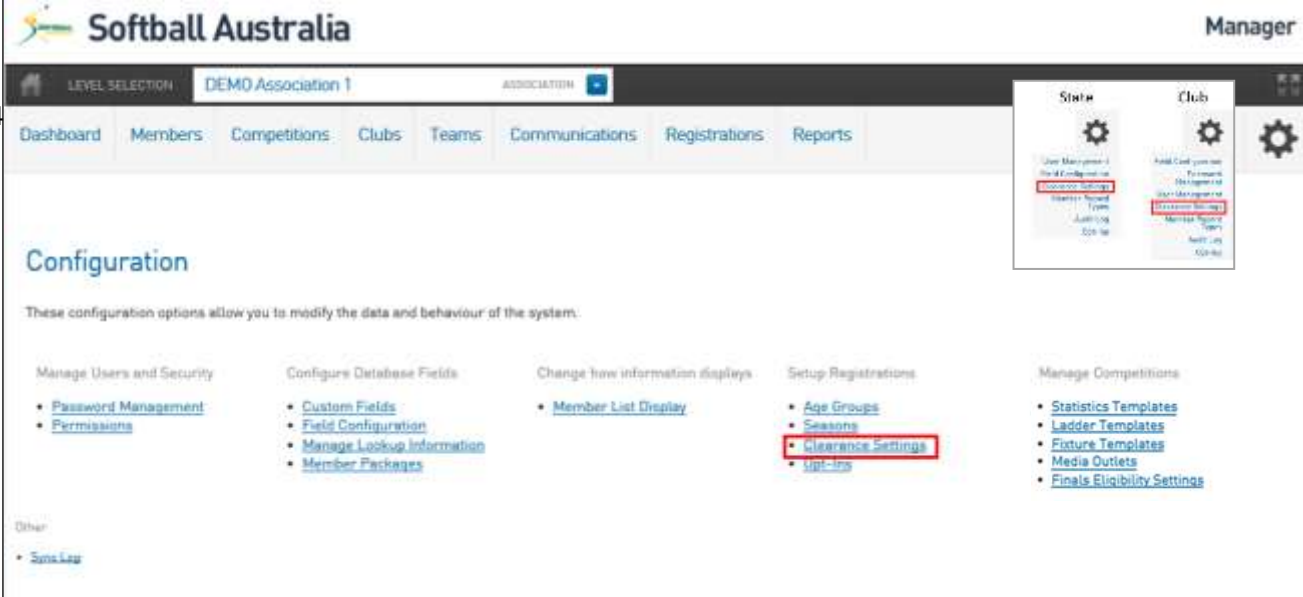
Seasons

- 90 For the purpose of softball Membership, a season is a defined 'Period to which a member is registered'. Seasons are an integral part of the Membership Database and all member registrations and all competitions **must** be assigned to a season.
- 91 Softball Australia will pre-define seasons in the Database that will cover both Summer and Winter competitions, (eg Season 2014/15, then Season 2015/16). This ensures that your data is managed and organised effectively, leading to accurate and informative historical data.
- 92 By organising your member and competition data into Seasons you will be able to quickly find information and produce reports.

Clearance Settings

- 93 There are a number of rules that associations can apply to how clearances are managed. For example, rather than manually approving or denying every clearance that is requested, associations can automatically approve or deny certain types of clearances, or player clearances within certain age groups.

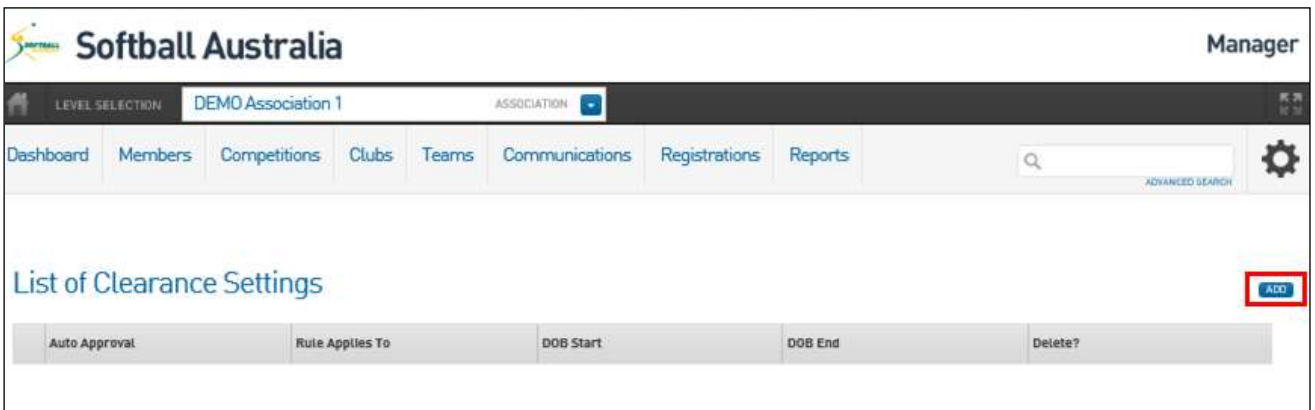
94



The screenshot shows the 'Softball Australia Manager' interface. At the top, there is a navigation bar with 'LEVEL SELECTION' set to 'DEMO Association 1' and 'ASSOCIATION' set to 'DEMO Association 1'. Below this is a menu with options: Dashboard, Members, Competitions, Clubs, Teams, Communications, Registrations, and Reports. On the right side, there are two columns of settings for 'Site' and 'Club', each with a gear icon and a list of options. The 'Site' column includes 'User Management', 'Field Configuration', 'Clearance Settings', 'Members', 'Types', 'Joining', and 'Exit fee'. The 'Club' column includes 'Field Configuration', 'Team Management', 'Clearance Settings', 'Members', 'Types', 'Joining', and 'Exit fee'. Below the navigation bar is the 'Configuration' section, which states: 'These configuration options allow you to modify the data and behaviour of the system.' There are five main categories of configuration options: 'Manage Users and Security' (with links for Password Management and Permissions), 'Configure Database Fields' (with links for Custom Fields, Field Configuration, Manage Lookup Information, and Member Packages), 'Change how information displays' (with a link for Member List Display), 'Setup Registrations' (with links for Age Groups, Seasons, Clearance Settings, and Sign-ins), and 'Manage Competitions' (with links for Statistics Templates, Ladder Templates, Fixture Templates, Media Outlets, and Finals Eligibility Settings). The 'Clearance Settings' link is highlighted with a red box.



The List of Clearance Settings page will appear, showing any existing clearance settings that have already been set up. On the right hand side, click **ADD**.



95 A blank **Clearance Settings** screen will appear.



Detail	Description
Override all rules with Association ID	Type in association ID
Auto Approval (compulsory)	Select one of three options for how clearances will be processed at association level: <ul style="list-style-type: none"> • automatically approve ('Auto Approve') • automatically deny ('Deny All') • manually approve or deny ('Manual Intervention Required')



Detail	Description
Rule Applies to (compulsory)	Apply the Auto Approval rule above to clearances as follows: <ul style="list-style-type: none">• where players come into the association ('Inward Only')• where players leave the association ('Outward Only')• for all inbound and outbound clearances ('Both Ways')
DOB Start Range (optional)	Enter the start of the date-of-birth range that the auto approval rule applies to.
DOB End range (optional)	Enter the end of the date-of-birth range that the auto approval rule applies to.





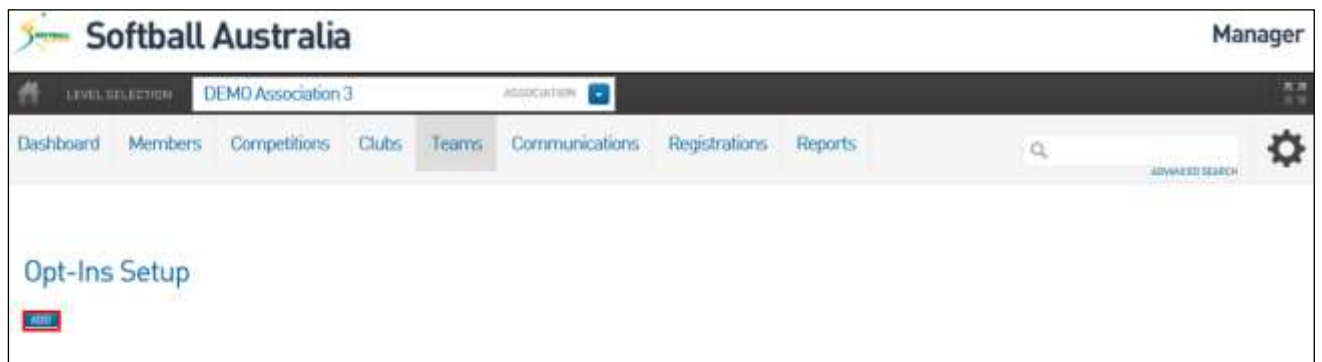
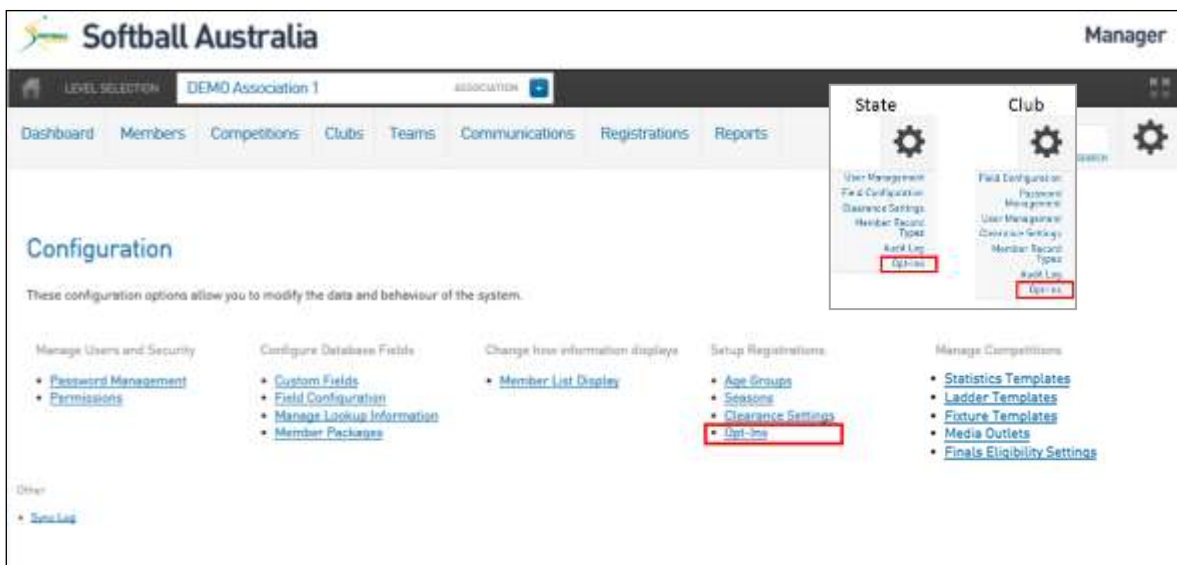
Opt-Ins

96 Opt-Ins allow you to add an additional Opt-In question specific to your level. In setting up the National Registration Form (Member to Club), Softball Australia has put in the option for members to:

“...receive communications from my local Club, Association, State body, Softball Australia and on behalf of their selected partners that may include reduced price tickets to matches, special offers and other promotions from time to time in accordance with the Softball Australia Privacy Policy available at <http://softball.org.au/extra.asp?ID=19499>.”

97 What this does mean is that any additional Opt-Ins (ie media and photo permission), need to be set either at state, association or club level.

98 To do this, go to **Opt-Ins** under the **Setting and Configuration (God Cog)**.



99 Click on **ADD**.



100 Fill in the **Opt-Ins** Message and click **Update**.

The screenshot shows the 'Softball Australia Manager' interface. At the top, there is a navigation bar with 'LEVEL SELECTION' set to 'DEMO Association 3' and 'ASSOCIATION' set to 'DEMO Association 3'. Below this is a menu with options: Dashboard, Members, Competitions, Clubs, Teams, Communications, Registrations, and Reports. A search bar and a settings gear icon are also present. The main content area is titled 'Opt-Ins Message'. It includes a link to return to the list of Opt-Ins, a text input field for the 'Opt-In Message' (highlighted with a red box), an 'Active' checkbox which is checked, and a green 'Update' button. Another link to return to the list of Opt-Ins is at the bottom.



IMPORTANT: Once you create an **Opt-Ins Message** the only way to deactivate it is to deselect the Active checkbox.

Although you can edit the message later on, it will create inconsistencies in registration information (Opt-Ins) if you do this part way through registrations for a season.





Manage Competition Block

101 The Manage Competition selections will all be covered in the Competition Training Module.

The screenshot shows the 'Softball Australia Manager' interface. At the top, there is a navigation bar with 'LEVEL SELECTION' set to 'DEMO Association 1' and 'ASSOCIATION'. Below this is a menu with options: Dashboard, Members, Competitions, Clubs, Teams, Communications, Registrations, and Reports. A search bar and a gear icon are also present. The main content area is titled 'Configuration' and contains the text: 'These configuration options allow you to modify the data and behaviour of the system.' There are five columns of configuration options:

- Manage Users and Security**
 - [Password Management](#)
 - [Permissions](#)
- Configure Database Fields**
 - [Custom Fields](#)
 - [Field Configuration](#)
 - [Manage Lookup Information](#)
 - [Member Packages](#)
- Change how information displays**
 - [Member List Display](#)
- Setup Registrations**
 - [Age Groups](#)
 - [Seasons](#)
 - [Clearance Settings](#)
 - [Opt-Ins](#)
- Manage Competitions** (highlighted with a red box)
 - [Statistics Templates](#)
 - [Ladder Templates](#)
 - [Fixture Templates](#)
 - [Media Outlets](#)
 - [Finals Eligibility Settings](#)





Appendix A –Full list of Membership – Restricted Access

Restricting access is similar to giving a read-only login and is typically used by clubs giving team managers access to perform functions like team selection, printing team sheets and results entry. The table below defines which functions are restricted.

	RESTRICTED ACCESS AT ASSOC LEVEL	RESTRICTED ACCESS AT CLUB LEVEL
Dashboard		
Edit Details	No	No
Edit Contacts	No	No
Edit Locator	No	No
Setting Cong	No	No
User Management Cong	No	No
Password Management	No	No
Notifications Bar	No	No
Members		
List Members	Yes	Yes
Duplicate Resolutions	No	No
List Online Transfers	No	No
Pending Registrations	No	Yes
Player Career Statistics	Yes	Yes
Request a Transfer	No	Yes
Competitions		
List Competitions	Yes	No
Match Results	No	No
Publish to web	No	No
Fixture grid	No	No
Venue Allocation	No	No
Any bulk movements	No	No
Club		
List Clubs	Yes	Yes
Club Championships	No	No
Add club	No	No
Teams		
View Teams	Yes	Yes
Modify team list	Yes	No
Add new team	No	No
Communications		
Send communications	Yes	Yes
Registrations		
Payment Configurations	No	No
Products	No	No
Registration Form	No	No
Payment Splits	No	No
Locator	No	No
Reports		
View and create reports	Yes	Yes
In a Member- Ability to Edit		
Details	No	No
Types	No	No
Update Transaction	Yes	Yes
Tags	No	No
Tribunal	Yes	No
Transfer History	No	No
Member History	No	No
Statistics	No	No