Tournament Organiser Checklist

This version last updated: 07/03/2023

This document covers the main steps in setting up and running a Congress and includes notes on areas that have caused confusion in the past. It shows references to the My ABF Tournament Organiser guide which should be used as a reference when more details are required for any area.

Please note this checklist is intended to be useful to all Tournament Organisers. If you have something you think should be added please advise Julian.foster@abf.com.au and I can update it.

	Tournament Organiser Guide reference
1. Getting set up to list a congress in My ABF	
Your club first needs to be set up in My ABF. If it isn't contact Julian Foster at julian.foster@abf.com.au You then need to decide who in your Organisation will have administration rights. Some clubs will have a single set of administrators who will have access to all areas (including congresses), others might set up a separate group just for congress access. You first need to have a "Series" in place. Each congress resides within a series (normally annual runnings of the same congress but can actually be any frequency). Series can be created within the Club Admin menu.	8
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2. Before the Congress – Set up "Wizard"	10
Each Congress in My ABF has its own webpage which is accessed from the public listing. These are automatically built in a standard layout based on information provided in the setup screens. <u>You do not need any webpage building skills!</u>	
Familiarise yourself with some other Congress pages on My ABF	
Familiarise yourself with the components of the standard Congress page and what you can include. You will soon learn what bits appear where and how easy it is to edit.	9
Step 1 – Create new congress Within the Club Admin menu, select Congresses.	
If necessary, create a new series to represent the Congress (only necessary if you are putting a new event into My ABF for the first time).	8.1
Select the series and generate the congress. In the first year you will need to create it from scratch, in subsequent years you can copy a previous one and just edit that.	8.2 8.5
Step 2 - General Information section *Points to note:* - <u>General Information</u> – Congress Type, Format (online or face to face) and Email contact are compulsory. Type & Format display on the main Congress listing to allow users to filter the overall list. Email should be the contact you want queries to come to. - <u>Downloadable files</u> – This is an orange button at the top and allows you to upload documents that your players can then download (e.g. brochure, supplementary regulations, prizes lists, accommodation lists, etc). - <u>Links</u> – Can be links to anything you want but you are **STRONGLY ADVISED to include a link to the My ABF Resources page** (particularly if this is the first time you are listing a congress) as it provides help for players in how to do their entries and payments: https://www.abf.com.au/member-services/my-abf-resources/players/ - <u>Additional information (footer)</u> – This appears at the bottom of the page under the Program of Events. It's a good place to clarify things like "Bridge Credits = $1", and show bank account details (details are emailed to players when they select that as a payment option but it's not automatically displayed elsewhere on the webpage).	10.2
Step 3 - Venue information Irrelevant for online congresses, otherwise add a venue and add co-ordinates to generate a Google Map view on the page.	10.3
Step 4 - Sponsor information This section is entirely optional. It shows at the top of the page and can accommodate logo images, links, text, etc.	10.4
Step 5 - Assorted date and payment options This is where you set up key dates for entries and discounts, what payment methods you are willing to accept from entrants and, if applicable, bank account / cheque details. Bridge credits cannot be disabled as a payment method. *Points to note:* <u>Last date for automatic refunds</u> – This is the date up to which players will be able to withdraw their entries and get given a refund of bridge credits (we are talking withdrawing an ENTIRE ENTRY here, not just a single player within an entry). After this date players will get a message saying they need to contact the Organiser. It's advisable to set this a few days before your Congress start date (you don't want pairs/teams being able to pull out the night before the event is due to start!)	10.5

	Tournament Organiser Guide reference
Before the Congress – Set up "Wizard"	
Step 5 - Assorted date and payment options (continued) • <u>Youth cut-off date</u> – The cut off date is the date on which you test whether the player must be under the age (usually 26). So it's usually a date in the current year or perhaps 1 Jan of next year. <u>It is NOT the date they must be born after to be eligible</u>. If you put something like 1998 in this field the system will check whether they are under 26 <u>on that date</u> which is not what you want! Youth discounts are calculated by the system automatically based on the date of birth in a player's profile. If they haven't entered a date of birth they won't get given a discount (you can edit the entry later if you need – see Managing entries below).	10.5
Step 6 - set up the events themselves *Points to note:* • <u>Entry fee</u> – You need to input the fee per ENTRY here not per PLAYER (same for any Early entry discount) • <u>Categories</u> – These are for use in events where you have a single field but where you might want to give separate prizes for the best X pair/team within that field. If you have separate fields, include them as separate events for players to enter. Categories are a compulsory field for players when you include them. If not everyone in the field is going to be eligible for a category, then you need to include a general "None" category as well. • <u>Sessions</u> – These are essential as they derive the Program of events on the main page.	10.6
Step 7 - Preview and publish the Congress *Points to note:* • <u>Public listing</u> - Publishing causes the congress to display in the public listing so players can view the page. • <u>Entries</u> - May not be open depending on the dates you included at step 5 (or overrode for a specific event at step 6). • <u>Subsequent editing</u> – A published congress can still be edited at any time. Minor edits can be done "live", if you want to make major edits you might choose to "Unpublish" the congress while you make the changes. Unpublishing does not lose any of the entries.	10.7
Re-opening a previously saved Draft version of a congress	
If you save a Draft version of a Congress without publishing it, you can re-open it from the Club Admin area.	8.3
Once a Congress is published, you can also access the Edit and Manage areas from the Congress webpage (there are buttons in the header).	8.4
ADDITIONAL NOTES	

	Tournament Organiser Guide reference
## 3. Before the Congress – General management	
Familiarise yourself with the structure of the Management area There are 4 levels which you can easily navigate between using the "breadcrumb" at the top of the screen:	11
• Congress level – 1st level showing each event in the congress (might only be one) and headline financials	11.1
• Event level – 2nd level showing the entries in a particular event	11.2
• Entry level – 3rd level showing the players in a particular entry	11.3
• Player level – 4th level showing detailed data for each player	11.4
Latest News From the top level Manage menu you can add Latest News. This appears in its own section on the webpage. It only displays one thing at a time and it doesn't record any history. So whatever you put in here will overwrite what was there before.	11.1.4
Bulletins From the top level Manage menu you can add bulletins. These are just a special type of downloadable file and appear in their own section on the webpage.	11.1.3
Searching for a player From the top level Manage menu you can search for a player and see what events they have entered. The results also display any Cancelled entries that player may have had.	11.1.6
ADDITIONAL NOTES	

	Tournament Organiser Guide reference
## 4. Before the Congress - Managing entries	
Email notifications You and anyone else on the Congress admin list will receive email notifications when players enter and amend entries. Note you only receive notifications for confirmed entries – which means you won't receive a notification if an entry is still in a player's "shopping cart" (even though those entries do display in the public entry lists).	13
Entry and Payment status Each entry has a status. It will be "Pending" until all players in it are marked as "Paid" (so that means an entry can be pending for 2 reasons – either it's still in someone's cart and isn't confirmed or it is confirmed but not everyone has paid – we do intend to change this to show those as two separate things). Each individual player also has a payment status (at the moment these are Unpaid, Pending Manual or Paid – we are intending to add more like Part-paid and Overpaid to provide clearer reporting).	
Changes to entries You can view the entries at any time (including a log of what's been done on each entry, by whom, and when) and you can also edit them yourself.	11.2
Moving entries It's possible to move an entry to another event of the same type (pairs to pairs, teams to teams, etc). This can be useful if someone enters the wrong event.	11.2.18
Handling TBAs Players can enter with "TBA" against one or more places in the entry. This can occur for two reasons – either they genuinely don't have a partner or they do but that person hasn't yet registered for My ABF (and therefore cannot be included by name). Wherever possible TBA's should be removed from all entries before the entry list is downloaded by the director for the scoring program. Where a TBA is known but not a registered My ABF user organisers can override the TBA with any active player from the Masterpoint Centre. This is done at the player detail level.	 11.4.2
Emailing players It's possible to send emails to: - everyone in the congress (from the 1ˢᵗ level congress screen) - everyone in a particular event (from that event level screen) - any individual player (from the individual entry screen)	 11.1.5 11.2.7 11.3.2
ADDITIONAL NOTES	

	Tournament Organiser Guide reference
5. Before the Congress - Managing payments	
Bridge credits payments These are really just online payments (either from the player's account if they already had funds in it or by online card if they didn't). When players pay this way, the system automatically updates their payment status. It is by far the easiest for everyone!	
Off system payments (bank transfer, cheque, cash) When players choose one of these methods their entry goes into a state of "Pending Manual". The system cannot know when this is paid so you, the organiser, need to change their status to "Paid" when you are satisfied the money has arrived. This is most conveniently done from the Off System Payments report at the Event level. You don't need to go right down to each individual player and edit that.	11.2.2
PP system If you already use a PP system, it's possible to let players select that. You can then export a list for upload into that system. You can also then update their status from Pending Manual to Paid as a bulk action rather than having to do it player by player.	11.2.3
Adjustments You have the ability (at the bottom player level) to edit pretty much anything (entry fee, amount paid, payment status, description, etc). But this should be a last resort.	11.4
Chasing up unpaid entrants There is an Unpaid entries report at Event level which shows all players marked as Unpaid. You can also email players from that (in bulk or individually).	11.2.11
Discounts (youth and other) It's possible to set up specific discounts for named players (e.g. perhaps people with discounted or free entries as a result of a prize won elsewhere). Early entry and Youth discounts are given by the system automatically based on the parameters input during the Setup. If you find people getting youth discounts who shouldn't you have probably not set up the Cut off date correctly or they have a wrong date of birth in their profile. If you find people not getting youth discounts who should they probably haven't put in a date of birth. These can all be adjusted at the player level (to enable a player incorrectly given a youth discount to make another payment you need to change their status to "unpaid" – yes even though they have already paid half. Despite the status the system DOES take into account what's already been paid when they pay again – the "Unpaid" is what 's needed to trigger the Pay button to appear for them. We intend to change the entry screen to make this presentation clearer).	11.2.6 11.4
Refunds When an entire entry is withdrawn bridge credits are automatically returned to whoever paid. When individual players withdraw there is an option to refund who paid for them (it is not automatic because the outgoing and incoming player may wish to just sort things out between themselves outside My ABF). If you as organiser withdraw an entry, you can edit what bridge credit refunds, if any, are given. If someone has paid by bank transfer, it's a good idea to withdraw their entry yourself and stop a bridge credits refund being given (since the norm would be for the Congress to refund them directly without the ABF getting involved).	7

	Tournament Organiser Guide reference
5. Before the Congress - Managing payments	
The club's Bridge Credits Statement Although not directly accessible from the Congress area, there is a bridge credits statement for the club which records all the entry transactions paid with bridge credits. This keeps track of how much the ABF will owe for the entry fees collected this way. Staff with "payments" access (frequently the treasurer but may also be the tournament organiser) can view this. It can also be used to manually transfer bridge credits to player in the event of special adjustments or refunds becoming necessary.	
Receiving entry fee money from the ABF Usually monies paid through Bridge Credits will build up and the ABF will do a settlement after the Congress. If, however, you require funds earlier (perhaps for a venue deposit or other costs) please contact ABF head office. Interim settlements can easily be arranged – and this is quite normal for the large national congresses.	
ADDITIONAL NOTES	

	Tournament Organiser Guide reference
6. Before the Congress – Director	
Providing access to the director At present there isn't a separate type of access for a director. They need to be given Congress access (this will be refined in time).	
Downloading entry lists The most common action a Director will need to do is to get entry lists for upload into the scoring software. They can do this using the csv downloads button either • as a single list for all events in a congress; or • a list for each specific event There is a specific download for the scoring software. As well as basic name and ABF number information this download also includes player & organiser notes, player contact details, etc.	11.1.7 11.2.13
Results & seating You may wish to display links to the results pages and/or seating. It is up to you where you put these – Latest News, General Information, Links are all plausible. The My ABF dashboard has a specific area where players' personalised results can be displayed. At the moment this only works for duplicate pairs sessions.	
ADDITIONAL NOTES	

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## 7. During the Congress	
<u>Updating Latest News and Bulletins</u> During the event these can both be accessed from the top level Actions menu to be updated.	
<u>Results & seating</u> These can be updated if necessary (but if all you have is a link to a separate results site then it won't be necessary to change anything)	
<u>Emailing players</u> You can email everyone in the Congress (perhaps about a daily bulletin or other news) from the top level Actions menu.	
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## 8. After the Congress	
Access to the Congress After completion the Congress will no longer be in the primary listing on the Congresses page but you can still access it. Just under the "Congresses" header there is a link saying "View completed congresses". Click that and you will see congresses for the last 6 months (you can use the arrow keys to go back further if required). You can then open the Congress as usual (including the administration areas).	
Prizes If you wish to pay prizes in the form of bridge credits this is possible – however **players must be given the choice of credits or "real money"** – we don't want players being given credits and then coming to the ABF later demanding real money. It is then possible to make Member transfers to deliver the prizes. This cannot be done from within the Congress area, however, it is done on the club's Bridge Credits Statement so it can only be done by someone with that level of access.	
Completing financial reconciliations The organiser should clear the financial reconciliations. The Pending column in the Manage area should ultimately be zero. This may require marking more Off-System payments as Paid or potentially making adjustments to specific players if unusual things have happened. No player should ultimately be left in a status of "Unpaid". This can be done manually but My ABF will do it automatically for you after a period of time if no action is taken (it will not actually take any payments, it will merely mark those payments as having been made and tag them "System adjusted"). This prevents any player being left with an outstanding debt that is most likely invalid (usually they have paid another way on the day but My ABF has just not been updated to reflect that).	12
Reports The best report for the financial reconciliation at this stage is the Entrants csv download which is available for each event. It shows all the entries and then lists all the individual players including what they have paid, and by what method. The bridge credits payments (termed "my system dollars" or "their system dollars" on this report) should match what has gone through the club's Bridge Credits statement. Some more detailed financial reconciliation reports are proposed.	11.2.13
Getting settlement payments from the ABF After the Congress, the amount on the club's bridge credits statement (less 2% for transaction costs) will be settled by the ABF. This is usually done at the end of each month. It is currently a manual process but it will become more streamlined as use of the system grows. Contact the ABF head office if you have specific requirements. If you are running multiple events in My ABF, settlement will generally be made for events that are complete but not for those still taking entries.	
ADDITIONAL NOTES	