

# USER GUIDE

Technical Officials Registration Platform - Admin

V3.0  
2024

# WELCOME

Welcome to Refbook, a leading sports officials management (SOM) platform.

Officials are a special part of sport's success, and we believe they deserve dedicated technology to help facilitate everyday administration tasks.

Refbook's mission is use data and technology to manage sports officials in the most efficient and connected platform. The cloud-based solution offers seamless connections with leading technologies and is designed to make life easier for the officiating industry.

Refbook provides a holistic solution to managing officials, working to facilitate the most important aspects such as availability, conflicts, assigning, payments, expenses, paperwork and registration. The extensive functionality suite is designed to work for both grassroots and elite officiating, with flexible configuration abilities to suit every Organisation.

Native mobile apps are available for officials to manage their games, claims and other administration tasks 24/7 on-the-move. This allows Organisations to truly connect with officials using leading technology and solving the problems that make a difference.

Refbook has been selected by your Organisation to help better manage its officials, saving both time and stress, while improving accuracy and data insights.



## The Official Solution.

## GO MOBILE

Manage your officiating on the go! Be sure to download the official Refbook mobile app for [iOS](#) or [Android](#) from the relevant app store.



## ABOUT THIS GUIDE

This document is a basic user guide for officials to manage the most common functionality.

- When you see this icon, click through to a short video explaining the concept further.
- When you see this icon, click through to the Knowledge Base explaining the concept further.



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## ABOUT THIS DOCUMENT

This document is an administrator's user guide for the Refbook registration module, also referred to as the Technical Officials Registration Platform (TORP).

When you see this icon, click through to a short video explaining the concept further.



When you see this icon, click through to the Knowledge Base explaining the concept further.



### GLOSSARY

<b>TO</b>	Technical Officials
<b>TORP</b>	Technical Officials Registration Platform
<b>Parent Organisation</b>	A governing body Organisation that is responsible for a network of child Organisation/Organisations
<b>Child Organisation</b>	A affiliate Organisation that is linked to a parent governing body
<b>Federation</b>	Same meaning as association/branch/club/committee
<b>Assigning</b>	Same meaning as parent/governing body
<b>Referee</b>	Same meaning as appointing/rostering/allocating/nominating
	Same meaning as umpire/official/judge/commissaire

# SOLUTION OVERVIEW

Welcome to the Technical Officials Registration Platform (TORP), a specialist solution that has been developed by Refbook to provide officiating Membership registration and database management.

TORP enables the management of officials focusing on the key components:

- Tracking and governance of Organisation Membership lists
- Registration fees
- Qualifications
- Participation reporting

The solution has many benefits for Organisations including:

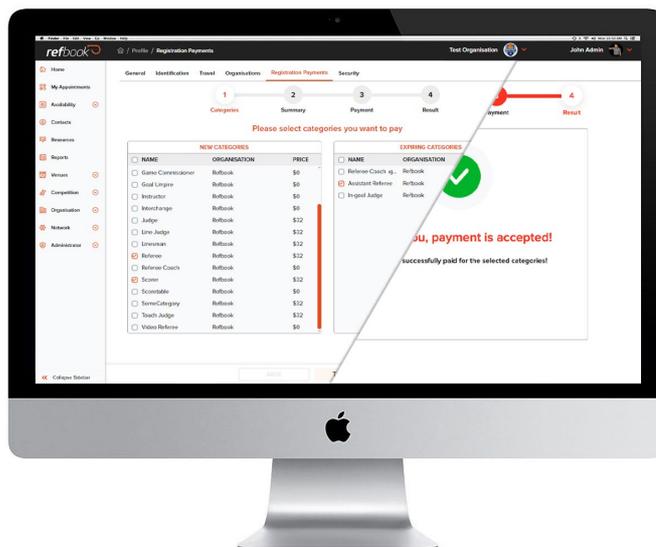
- Improved data protections to avoid unsecure sharing of user information
- User-driven contact details management
- Heavily reduced manual workload recording of financial registrations
- Seamless reporting capabilities

Refbook's TORP is a fully integrated module of Refbook's assignment licences.

## CORE FEATURES

This platform allows federations and its affiliated Organisations to manage technical officials' data, including:

- Create local registration fees for Organisation/association Members (via shopping cart experience)
- User-based processing of all officials registration including online payments
  - multi-category (statistician, score table, referee)
  - multi-Organisation
  - life Members
  - past/temporary
- manage full Member lists and status within the Organisation
- immediate access to user contact details (CRM)
- reporting

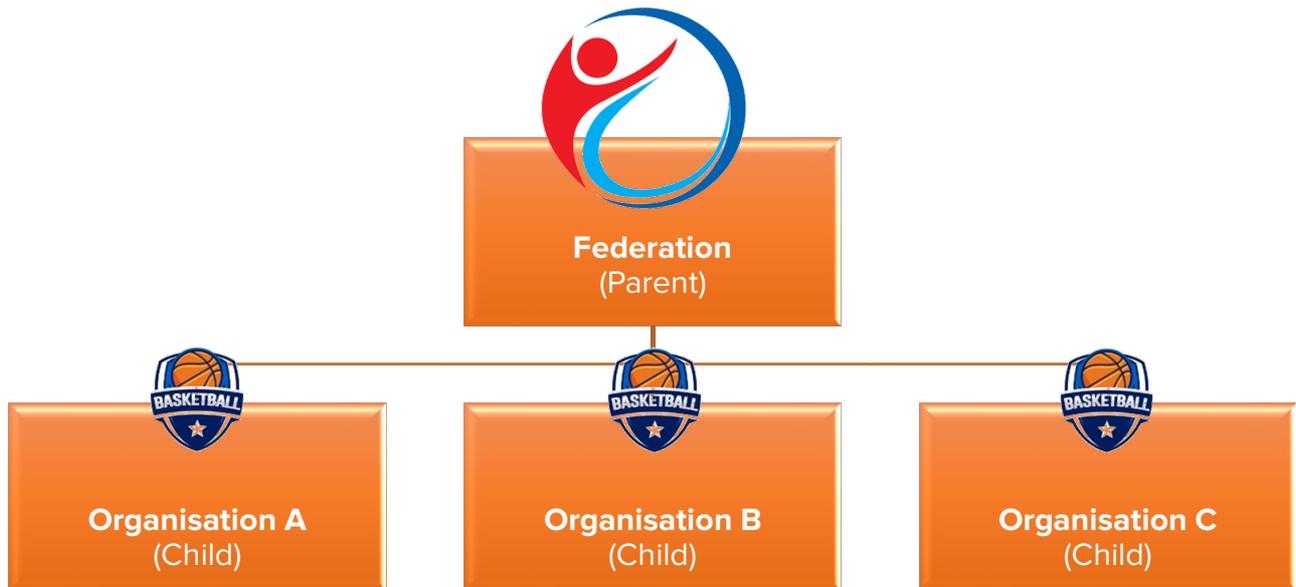


## FEDERATION NETWORKS (An Introduction)

Refbook understands the foundational 'parent/child' relationship that often exist between technical officiating governing bodies (aka federations) and their network of Organisations. The TORP delivers a centralised management system for Organisations within these interconnected sport networks.

Typically, each child Organisation within the network is responsible for its own Membership list, but may have responsibilities (financial or reporting) to the governing parent federation.

*Diagram: Hierarchy architecture of a sport network's parent/child Organisation relationship*



## MEMBERSHIP OVERVIEW

This section explains the important Membership concepts and principles that drive the platform's registration workflow. These will be explained in detail however it's useful to first understand how these elements interact.

### WHAT IS MEMBERSHIP?

'Membership' refers to an official's connection within the Organisation's Refbook account. There will be many individuals that come into contact with the Organisation, representing a diverse range of officiating characteristics and engagement levels. Members may have long term/high activity officiating workloads with the Organisation, or they may be partial, temporary or visiting.

Tracking Membership across individuals no longer connected to the Organisation is also useful in order to facilitate comprehensive historic recording keeping.

An Organisation's relationship with individual officials starts via Refbook's invitation/acceptance methodology. Depending on the method adopted by your governing federation, Organisations may have some preliminary Membership data uploaded by Refbook to support a quick roll-out and save administrators an initial upload.

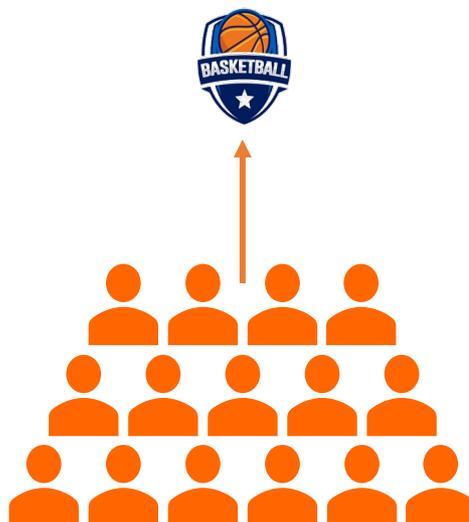
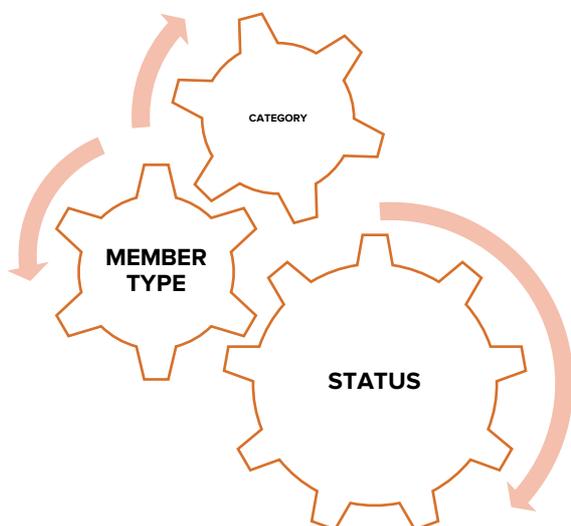


Diagram: visualisation of Membership to an Organisation

### MEMBERSHIP PRINCIPLES

The TORP solution has been founded on three underlying Membership principles. They combine to determine how an individual official is classed, tracked and registered as a Member of the Organisation.



#### **CATEGORY**

The fee bracket(s) a Member has been attached to within the Organisation.

#### **MEMBERSHIP TYPE**

The current classification of a Member within the Organisation.

#### **MEMBERSHIP STATUS**

The current active relationship of a Member within the Organisation.

Please read these principle's dedicated sections within this document to understand their interactions with the TORP.

## ORGANISATION REGISTRATION

This section explains the registration concept and how it links to Members within your Organisation.

Registration is performed by the individual themselves through their 'My Profile' section, with financial transactions processed via an online payment gateway.

The collated payment of one or multiple fees by an individual Member is then distributed to the required recipient Organisations, saving both official and administration valuable time in manually processing multiple, and potentially tiered, fee structures.



Diagram: basic workflow of Members processing registration including their financial payments

### FEE CONCEPT

Within sports officiating it is common that officials may be required to pay a fee based on their Membership:

- Licence Fee:
  - their sport's Federation/governing body (aka **grandparent**), and/or;
  - their sport's interim Federation/governing body (aka **parent**), and/or;
- Registration Fee:
  - their immediate local Organisation (aka **child**).

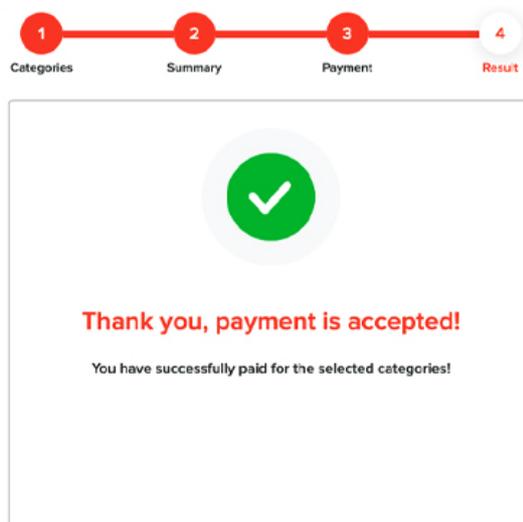
Refbook allows each Organisation, including hierarchical Federation structures, to set fees that are payable by an individual Member.

Organisations do not need to directly issue fees to officials. Prompting of relevant fees is performed automatically by the system based on Membership principles (eg: upon joining as a Member) including renewal dates.

## Registration Workflow

Registration is a Member-executed process typically involving the paying of a registration fee to update their Membership within an Organisation. TORP avoids the Organisation needing to manually monitor and update their Membership base's registration process, whether for parent (Federation) or local requirements.

The below workflow outlines the journey that Members go on when processing Membership registrations for their connected Organisations.



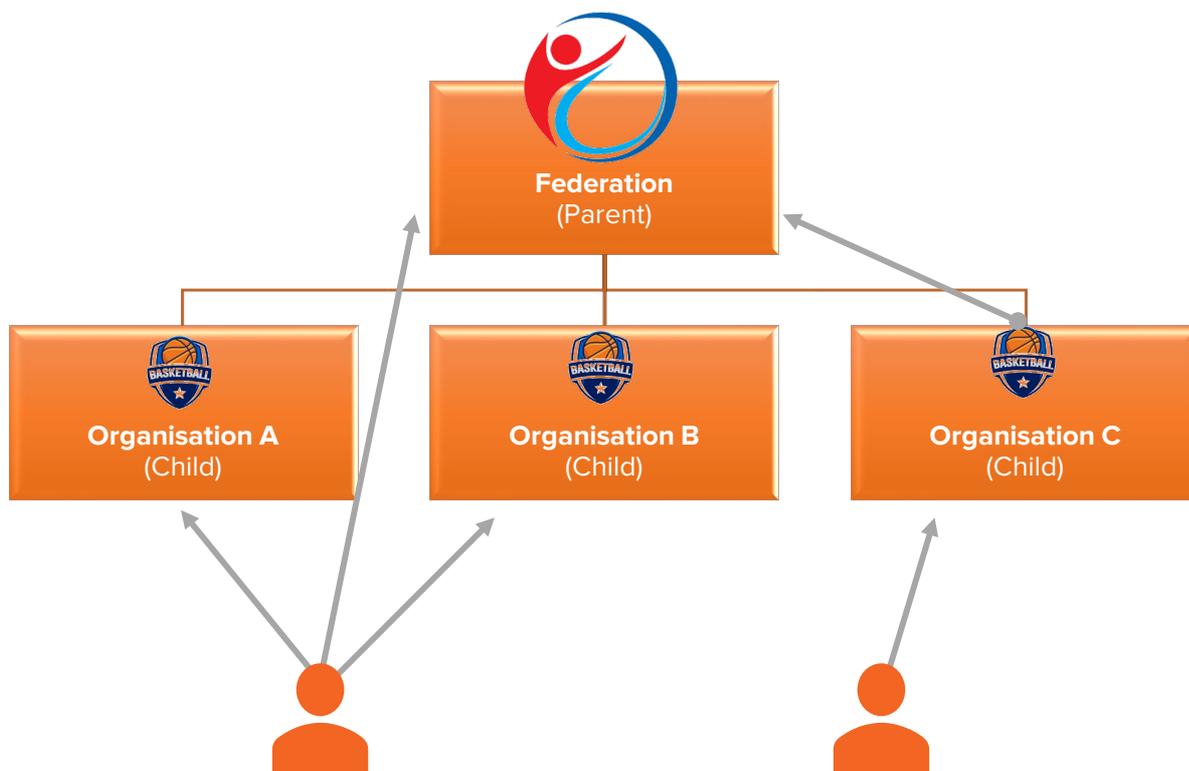
### The Member's registration workflow

- 1) Accept a link via email to join the organisation and/or register a free Refbook account (if they don't have one already)
- 2) Update personal details in 'My Profile' including mandatory fields, documentation (Working with Children's Check), and bank details (if required)
- 3) The Member's 'My Profile' section will automatically detect any relevant fees that are required and outstanding for each connected Organisation/Federation.
- 4) Clicking the registration process from 'My Profile' allows officials to enter the registration 'shopping cart'. Members can only transact registration from Organisations/Federations they are connected to, and can opt to transact all at once, or selected.
- 5) The Member clicks through and uses the secure payment gateway to process the total required payment as one transaction.
- 6) Registration is marked as 'Paid' for the Organisation/Federation and their membership is updated automatically.
- 7) Nothing further is required until the registration's renewal date.

## Multi-Organisation Registration

Depending on the official's Membership connections and personal officiating categories, a single individual may need to process multiple registrations across different Organisations and Federations. This can be easily performed in a collated transaction.

*Diagram: Example of multiple fees within a sport's network of parent/child relationships*



Example 1			
ORGANISATION	METHOD	MEMBER TYPE	STATUS
Federation fee	Direct to Federation		
Organisation A	Direct to Org	Full	Active
Organisation B	Direct to Org	Full	Active

Example 2			
ORGANISATION	METHOD	MEMBER TYPE	STATUS
Federation fee	Pay on Behalf		
Organisation C	Direct to Org	Full	Active

Example 1 (Direct method):

- Member will pay Federation Fee and the two Organisation Registration fees in a single transaction, with monies being distributed to each relevant party.

Example 2 (Pay on Behalf method)

- Member will pay a Registration fee in a single transaction directly to the Organisation, who will then contact the Federation to enable the 'Pay on Behalf' method and facilitate a mediated payment on behalf of multiple Members. This can be paid through Refbook's payment gateway, or through other means as facilitated directly with the Member.

# GETTING STARTED

## REGISTERING AN ACCOUNT

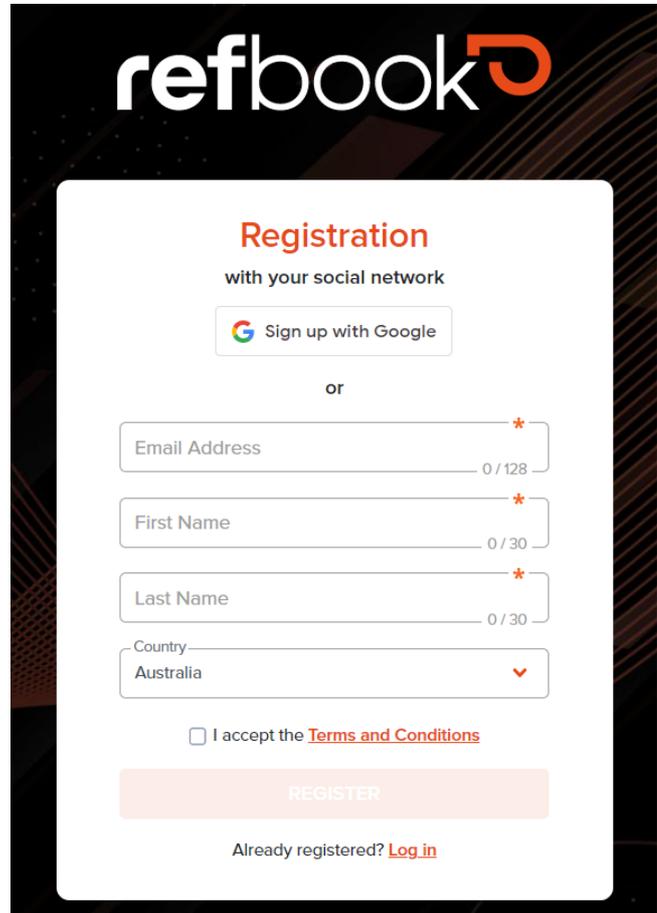
**Note:** you do not need to be invited by an Organisation in order to register. This can be done anytime directly with Refbook and is free to create.

Once you have a Refbook user profile you're able to receive invitations from any Organisation to join their Membership base.

Accessing the Refbook platform can be done via two methods:

- Head to [www.refbook.online](http://www.refbook.online)
  - Download the mobile app for [iOS](#) or [Android](#) from the relevant app store.
1. Select the 'Create an account' option on the homepage
  2. Choose either method:
    - a. Sign-up with Google credentials (eg: your Gmail details)
    - b. Enter your first name, surname and email address
  3. Read and accept the terms and conditions
  4. Click 'Register'
  5. You will receive a verification email. Please wait up to 5 minutes and check your junk/spam folder. Don't click 'forgot password' again as this will generate additional temporary passwords and create confusion for you.
  6. Click on the link supplied
  7. Once verified, a temporary password will be sent to you. Use this to login for the first time.

**Note:** Please use this within 24 hours as the password will expire for security reasons.
  8. You will be able to create a new password within your profile.



## LOGGING IN

Accessing the Refbook platform can be done via two methods:

- Head to [www.refbook.online](http://www.refbook.online) and click 'LOGIN'
  - Download the mobile app for [iOS](#) or [Android](#) from the relevant app store.
1. Sign in using your preferred method
    - a. Using Google credentials
    - b. Enter your username and password
  2. Click 'Log In'



## CONNECTING TO YOUR ORGANISATION

The Primary Administrator nominated by the Organisation will be sent an invitation to join to the Organisation's account.

1. You will receive an invitation email. Click on the link supplied
2. This will automatically enable administrator privileges to your individual account.

## BASIC PLATFORM NAVIGATION

Once logged in, Primary Administrators using the Refbook TORP will need to become familiar with the main areas.

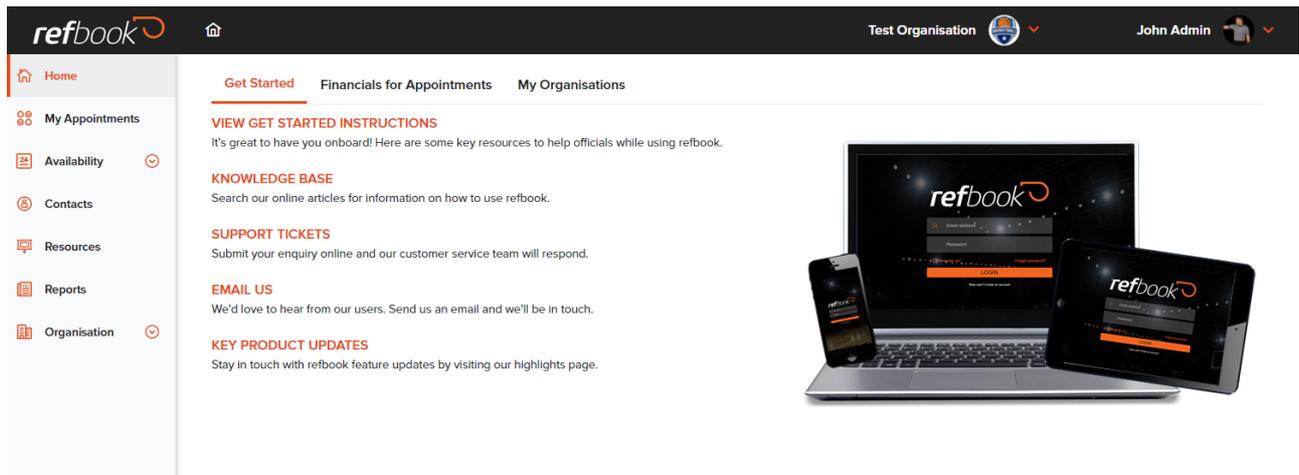


Image: Refbook Lite homepage (Administrator view)

## OFFICIALS-RELEVANT SECTIONS (only relevant if being assigned to games)

1. Home landing page with support quick-links
2. My Appointments this is where you will see any personal appointments
3. Availability view and create availability settings for assignment
4. Contacts view and create personal or Organisation-based contacts phonebook
5. Resources access relevant materials as uploaded by the Organisation's administrator

## ADMIN-RELEVANT SECTIONS

6. Reports generate data reporting
7. Organisation Organisation configuration, Membership management and user access

## CATEGORIES

Categories are easily definable Membership brackets relevant to an Organisation. Selecting a Member's categories is a requirement should you wish to charge a Registration fee in the platform.

It is possible for Members to have multiple categories applied for multiple Registration fees.

### ORGANISATION CATEGORIES AND REGISTRATION FEES

Categories are directly linked to the Membership bracket and can also be linked to a financial fee upon Membership principles and/or time period.

Categories can be configured to facilitate local Organisation registration fees that will be required of Members.

*Table: An example Member's categories and their associated financial registration fees*

CATEGORY	REGISTRATION FEE
Referee	\$20
Referee Educator	\$10
Scoretable	\$5
Statistician	\$5
<b>TOTAL REGISTRATION</b>	<b>\$40</b>

## VIEWING CATEGORIES

1. Go to **Organisation>Preferences>Registration**. This will open the Category tab to view the list of officiating categories available for your Organisation to use.

## ADDING CUSTOM CATEGORIES

1. Go to **Organisation>Preferences>Registration**.

The screenshot shows a web interface for managing registration categories. At the top, there are navigation tabs: General, Settings, Documents, Assignment Info, Payment Processing, Personalisation, **Registration**, and Roles & Permissions. Below these are sub-tabs: **Category**, Category Fee, and Payout Details. A search bar is located on the right. Below the search bar is a dropdown menu showing 'Selected 6 of 6'. A table with the following columns is displayed: NAME, SHORT NAME, FEES, FEE TYPE, REGISTRATION LENGTH, and ACTIONS. The table is currently empty, showing 'No records found'.

2. Click + plus button
3. Complete the fields:
  - a. Name
  - b. Short Name
  - c. Description
  - d. Registration Length: the length of registration from time of collection
  - e. Registration Fees: leave this field blank if you have not set up any Organisation registration fees to select from. This step will be completed at the fee creation stage of the process.
  - f. Fee Type
    - i. Single: a flat fee will be charged regardless of how many paid categories are applicable to the Member during registration. (For example: a Member might represent multiple categories but will only be charged a single fee)
    - ii. Stacked: fees will accumulate for every paid category applicable (for example: if a Member represents 6 x paid categories they will be charged the combined 6 x charges)
  - g. Cover fees by user: select whether the Organisation or the payer will be covering the online payment transaction fees charged by the payment gateway
  - h. (if Stacking) Recurring: toggle on if you wish the Membership to be recurring
  - i. Administrative Fee (optional): ability to charge a fee for Members who did not pay the previous registration
4. Click **Save**

The screenshot shows the form fields for adding a new registration category. The fields are: Name (0 / 30), Short Name (0 / 5), Description (0 / 250), Registration Length (3 Months), Registration Fees, Fee Type (Stacking), Cover Fees By User (toggle), Recurring (toggle), and Administrative Fee (0 / 5).

## MEMBER TYPES & STATUS

### MEMBER TYPE

The Organisation's Membership list will be made up from a variety of different 'Member Types'. An individual may have different Membership types across different Organisations within the federation network.

Membership Type is the first criteria that decides the outcome of the Membership fees that an official is required to pay during registration.

Table: system preset list of Member Types

MEMBER TYPE	DESCRIPTION	EXAMPLE
<b>None</b>	The User is part of the Organisation but is not a Member	Staff Office bearers
<b>Full</b>	Members with full rights at your Organisation	<i>Primarily</i> officiates for your Organisation (aka voting Members)
<b>Partial</b>	Members with limited rights at your Organisation; aka 'affiliate' Member	<i>Occasionally</i> officiates for your Organisation and should be counted to overall Membership (aka non-voting Members)
<b>Life</b>	This is a life Member of an Organisation	The Member holds a life Membership standing within your Organisation (if applicable)
<b>Social</b>	Active Members who are not reimbursed or because they are not an active official	Volunteers Replacements/Fill-ins
<b>Temporary</b>	Members who are 'visiting' your Organisation	Tournament visitor
<b>Other</b>	A Member that doesn't fall within any of the above categories	

### MEMBERSHIP STATUS

Refers to the current activity status of each Member.

STATUS	DESCRIPTION
Active	A Member who is currently actively participating within your Organisation
Inactive	A Member who is currently not participating within your Organisation
Pending	A Member has registered interest and pending activity within your Organisation (eg: future Member, waiting list)
Deceased	
Paused	A Member who may have been suspended or displaying long-term inactivity
<b>*Anomolised</b>	<b>A User has directly requested that all personally identifiable information is removed forever from the Organisation</b>

**Note:** the actionable results of changing a Member to 'Anomolised' status is that all assignments and any reference to that User will display as 'Anomolised Anomolised'. All current Membership information, statuses, access to Profile contact information will be removed, and cannot be reversed by the Organisation or Refbook. The only way this data could be returned/reversed is through the User directly in the platform (eg: re-join the Organisation).

## REGISTRATION FEES

Once categories have been created for the Organisation, a registration fee schedule can be configured and attached.

### Notes:

- Multiple officiating categories can be linked to a single registration fee.
- Member Types and Status can be attached to a Registration Fee, but is not essential
- There is no limit on the number of registration fees that can be created for your Membership structure.

Table: An example Organisation's registration fee schedule

REGISTRATION FEE	CATEGORY(S)	MEMBER TYPES	MEMBER STATUS	FEE
Annual Membership	Referee, Referee Educator, Scoretable			\$20
Partial Membership	Referee, Referee Educator, Scoretable	Partial	Active	\$10
Scoretable Squad	Scoretable	Full, Partial	Active	\$10
Social Group	All	Full, Partial, Social	Active	\$5

### VIEWING ORGANISATION FEES

1. Go to Organisation>Preferences>Category Fee. This will open the Category Fee tab to view the list of fees created within your Organisation.

### CREATING ORGANISATION FEES

1. Go to Organisation>Preferences>Registration>Category Fee

2. Click + plus button
3. Complete the fields:
  - a. Name: eg: "Annual Organisation Fee"
  - b. Amount (\$)
  - c. Fee Expiry Date (optional): only set a date if the fee needs to be active for a specified time. Otherwise if the fee is ongoing, leave blank
  - d. Registration categories: select all categories this fee will apply to
  - e. Membership Types: set which Membership types are required to pay this fee (multi-select)
  - f. Membership Statuses: select all statuses that will be automatically emailed when the renewal date is reached (multi-select)
4. Click **Save**

# MANAGING MEMBERSHIP LISTS

## VIEW MEMBERSHIP LIST

Depending on your project's configuration, your Organisation's current Membership list may already be added with the Organisation's information (eg: if provided to your Federation or Refbook Support's Team). It is recommended that before reaching the renewal date you check the Membership list to ensure all Members are assigned to at least one category and have the correct Membership type and status applied to them.

1. To view/check the Organisation's Membership list, in the left menu, go to Organisation>Membership.

## UPDATING MEMBERSHIP DATA (SINGLE EDIT)

Should any data (Membership type, status, categories, qualifications and duties):

1. Go to **Organisation>Membership**
2. Click the **info** icon to update an individual Member 
3. Change the required field
4. Click **Save**



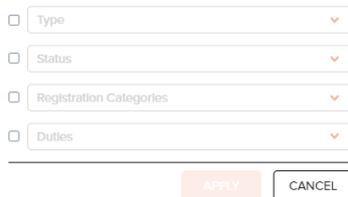
A vertical list of dropdown menus for editing membership data. The fields are: Type (Full), Status (Active), Registration Categories, Qualifications, Default Qualification, and Duties. Each dropdown has a downward arrow on the right.

## UPDATING MEMBERSHIP DATA (BULK EDIT)

**Note:** this process will **override** existing settings and will not add/append to current data.

1. Go to **Organisation>Membership**
2. Select multiple Members to edit in bulk (select all or multi-select)
3. Click the **Bulk Change** button 
4. Change the required field

### Bulk Change



A form titled 'Bulk Change' with four dropdown menus: Type, Status, Registration Categories, and Duties. Each dropdown has a checkbox to its left. Below the dropdowns are two buttons: 'APPLY' and 'CANCEL'.

5. Click **Save**

## ADDING ORGANISATION MEMBERS (SINGLE)

1. Head to **Organisation>Membership**



A screenshot of the 'Organisation Membership' page. At the top, there's a 'General' section with a 'Status' dropdown set to 'All' and a 'Selected 14 of 14' dropdown. To the right is a search bar and a '+' button. Below this is a table with columns: FIRST NAME, LAST NAME, EMAIL, MOBILE, JOINED, PANEL GROUPS, ROLES, CATEGORIES, LICENCES, MEM. The table is currently empty, showing 'No records found'. At the bottom right, there is a 'BULK CHANGE' button.

2. Click the + button on the Membership page and complete the following fields:

- Email address: (note: the email address of the Member you are wanting to add. Please reMember that all Members MUST have their own unique email address).
- Status: select status applicable to Member you are adding
- Registration categories: select categories applicable to the Member you are adding

3. Click **Save**

### Add New Member

Email  0 / 128

Status

Registration Categories

**SAVE** **CANCEL**

### MARKING A MEMBER AS REGISTERED

1. Go to **Organisation>Membership**

	FIRST NAME	LAST NAME	EMAIL	MOBILE	JOINED	PANEL GROUPS	ROLES	CATEGORIES	LICENCES	MEMBER TYPE	STATUS	REGISTRATION STATUS	ACTIONS
<input type="checkbox"/>			geelong.active@gm ail.com			0		●		Full	Inactive		ⓘ
<input type="checkbox"/>			geelong.admin@gm ail.com			0		●		Social	Active		ⓘ
<input type="checkbox"/>			geelong.beginner@ gmail.com			0		●		Temporary	Active		ⓘ
<input type="checkbox"/>			geelong.combinatio n@gmail.com			0		●		Full	Active		ⓘ
<input type="checkbox"/>			geelong.life@membe r@gmail.com			0		●		Life	Active		ⓘ

- Select the **Info** icon in the actions column next to the relevant Member ⓘ
- Click on the orange 'refresh' button next to registration status

Registration Status:  

4. Change Status to **Registered**

Status  \*

Registered

Unregistered

None/Other

0 / 250

**SAVE** **CANCEL**

5. Click **Save**

### PROMPTING MEMBERSHIP ACCEPTANCE

When a Member is added to your Membership list you will notice an envelope icon. 

Clicking on this icon prompts an email to be sent to the Member asking them to complete the steps required to join your Organisation. This process is required as all Organisation Membership requires an invitation to be accepted by the individual.

# SUPPORT

## FEDERATION CONFIGURATION & REGISTRATION QUESTIONS

For further clarification on registration or assistance regarding configuring the platform for your Organisation within your Federation, please contact your project administrator.

## USER GUIDES (PDF)

Two detailed user guides have been created for the TORP.

1. **Administrators**
2. **Officials**

## QUICK-START GUIDES (PDF)

Two quick-start user guides have been created to fast-track implementation within your Organisation.

1. **Administrators:**
2. **Officials**

## FAQS

This document answers the most common areas that have been raised around configuration, processing registrations and policies.

## KNOWLEDGE BASE

Refbook's online Support Centre contains an online knowledge base providing instructional articles with screenshots. This resource is available 24/7 via permalink from the application or direct URL and is constantly updated for new releases/features and real-life user cases. Head to [support.refbook.software](https://support.refbook.software).

## SUPPORT DESK

Refbook's online support centre allows users to create profiles in order to lodge/track question or problem 'tickets' in real-time. These should be matters related to platform functionality (eg: registration, password resets) and not related to detailed Organisational configuration or how to use the platform. Head to [support.Refbook.com.au](https://support.Refbook.com.au)

## SUPPORT EMAIL

Organisations may send an email to Refbook's support email: [support@refbook.software](mailto:support@refbook.software). Refbook will use commercially reasonable efforts to respond to all support emails/phone calls within one to three business days.