The Federations’ guide

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General information

This guide assumes that you have received administrative rights on the federation level. To confirm your administrative right at federation level you should be able to choose your federation at the log in view up in the left corner (picture 1) and also have the menu item Administration available (picture 2). If you do not have these rights, please contact the IOF office.

Picture 1

![Event calendar](image1.jpg)

Picture 2

![Administration menu](image2.jpg)
Add members to the federation

One of the first things you should do as a federation Super administrator in IOF Eventor, is to add members to your federation. Federation members may in turn be assigned to different roles within the federation (described later in this guide). These roles are:

- Members – athletes representing your country.
- National team managers – people responsible for entry and update data for IOF events.
- Event organiser – people maintaining event- start list- and result data, services and registrations.
- Administrator – this role give you the right to assign the roles member, National team manager and Event organiser to other members within your federation.
- Super administrator – the same rights as the role Administrator, but you can also assign the roles Administrator and Super administrator to other members within your federation.

The people you add as federation members should, in other words, fit into any of the above roles. This is how you add federation members (Assuming that you're logged in with administrative rights):

1. Click the menu Federation/members.
2. Click *Search person to add as member*, fill in relevant search criteria and click *Search*.

3. From the search result, click *Add as a member*. (If you cannot find your person, go to item five below).
4. The new member will now be displayed in the federation’s member list.

5. If you cannot find the person via Search person to add as member, click Create members.

   a. Fill in at least First name, Last name, Gender and Date of birth. If you also want the person to get log in details (username and password) for IOF Eventor via e-mail, you have to fill in the E-mail address and tick the box Send password. Click Next to continue.
b. Confirm the details provided and click Save.

Assign roles to members of the federation

After you have added members to your federation, it is time to assign roles to the members. 
You have the possibility to edit roles for several persons at once (Assuming that you're 
logged in with administrative rights):

1. Click the menu Administration/Organisations/Assign roles, select your federation and 
click Edit roles.

2. Assign roles to the persons by ticking the boxes. Click Save when you are finished. 
The picture below will assign the following rights:
   a. Robin Ray – Super administrator
   b. Memberone – Administrator
   c. MemberThree – Event organiser and Member
   d. Membertwo – National team manager
3. You get a confirmation that the assignments are saved.

Create a club
There are several possibilities, in IOF Eventor, to create a new club:

1. As part of creating a new user account from IOF Eventor’s home page.
2. From the menu item My pages/Edit profile and the tab Competitor details (available for any user account in IOF Eventor).
   a. When you click Add, you have the possibility to add a new club.
3. From the menu item Administration/Organisations/Create new (provided that you have been assigned federation rights).

As a federation administrator you should use the third alternative, where you have the possibility to fill in all the information of the club from a single view (the first two options only give you the option to fill in the club's name). Assuming that you are logged in with administrative rights, do the following:
1. Click the menu Administration/Organisations/Create new.

2. Fill in the form and click Save.
Add members to the club

The recommended way to add a club member is that the member himself clicks the menu My pages/Edit profile, and from the tab Competitor details clicks Add. If you want to do it as a federation administrator, do the following:

1. Click the menu Federation/Roles/Search by person name, chose the person you want to add to the club and click Edit roles.

2. In the section Add a new organization, select the club (South Africa Club six in this example) and click Add.
3. In the section for the new club, check the box Member and click Save.

4. To confirm the membership, open menu Administration/Organisations/Overview and click the link to the club.
5. Click Members.

![Organisation Information South Africa Club Six]

6. Confirm the membership.

![Members of South Africa Club Six]

Assign roles to members of a club
You also have the possibility to assign roles to members of a specific club. The roles you can assign to members of a club are:

- Administrator – The same rights as the Event Organiser and also add club members, edit club details and assign roles to club members.
- Event Organiser - maintaining event start list and result data, services and registrations (provided that IOF has assigned the role Organiser to the club).
- Member

To edit roles for several persons at once (Assuming that you are logged in with at least administrative rights for the club), do the following:

1. Click the menu Administration/Organisations/Assign roles, select a club and click Edit roles.

![Choose the organisation to edit roles for]
2. Assign roles to the persons by ticking the boxes. Click Save when you are finished.

   The picture below will assign the following rights:
   a. MemberFour – Event Organiser
   b. Memberone – Administrator

   ![Edit roles in South Africa Club one](image)

   You get a confirmation that the assignments are saved.
Apply for World Ranking Event

To apply for a World Ranking Event, you have to log in to IOF Eventor as a federation administrator and fill out an electronic form.

1. Click the menu **Administration/Events/Apply for World Ranking Event**, chose discipline and click Next.

2. Fill out the form (mandatory fields are marked with red stars). The form is interactive and you will need to complete follow-up questions depending of what alternatives you chose. When you are ready, tick the box **By submitting this application**... at the bottom of the page and click **Save**.
3. You get a confirmation that the form is saved.

Create a user account for an official (VIP or media person)
To create an account connected to an official in IOF Eventor, do the following:

1. Click the menu **Federation/Members** and click **Create members**.
a. Fill in at least First name, Last name, Gender and Date of birth. If you also want the person to get log in details (username and password) for IOF Eventor via e-mail, you have to fill in the E-mail address and tick the box Send password. Click Next to continue.

![Create members](image)

b. Confirm the details provided and click Save.

![Add members: confirm](image)

c. The account will be shown as a member in your federation. It is now possible to add the official to events and services.

![The members were saved](image)

Manage Athlete Licences
The responsibility to sign athlete licence form and pay athlete licence lies on the athlete. However, some federations may pay the licence fee for their athletes. IOF Eventor is developed with an athlete
licence payment functionality where the federation pays for one or several Licences and then assigns them to selected athletes.

**Federation roles that can manage Licences**
The Licences can be managed by IOF Eventor roles:

- Federation Administrator
- Federation Team Manager.

**Overview**
To find the status of Athlete Licences for all federations, click on menu *Athlete Licences*. The list of athletes shows all athletes for all federations with a paid licence or with an initiated payment for a licence. It is the payment or initiated payment that declares decides that the athlete is shown on this list. Athletes that have only signed the form doesn’t show up on this list.

**Pay for athlete licences for athletes in your federation**
The Federation view for management and payment of athlete Licences can be reached through Menu item *Athlete Licences* and then choose view *Manage athlete licences for “Your” Orienteering Federation*. If you don’t see this view you don’t have the Administrator or Team Manager role of your federation.

The view contains 4 parts:

1. A menu (Where you can purchase licences and create two reports)
2. A list of Licenced athletes or their status.
3. A list where purchased Licences can be assigned to athletes.
4. A list of request from athletes to pay the athlete licence.
Purchase Licences

To purchase Licences, click on Purchase athlete licences in the upper menu in the Federation view. Select the year you want to purchase Licences for and the number of Licences.

Note! You can buy Licences and assign them later throughout the season.
Select payment method. If you choose to pay by international bank transfer, select that option and click on pay later.

Assign purchased Licences to an athlete

1. Go to the Federation view (see above)
2. Navigate to the Assign athlete licences section. Select the right year!
3. Select an athlete in the dropdown list.
4. **Click on the button Assign Licences to athletes**

**Requests from athletes to pay licence fees for**

In the Federation view, there is a section that is called *Athletes to pay licence fees for*. Here is all requests from athletes that have selected “My federation pays” for a licence year. When you assign a licence to that athlete the request will be deleted. If you won’t pay the licence fee, contact the athlete and delete the request.

**Manage Payments Receipts and Complete ongoing payments**

In the Federation view, choose the upper menu item *Show summary of athlete licence purchased by federation.*

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**Athlete licence Q & A**

Q: What happens if we don’t use all purchased licences from a year?
A: IOF Office will transfer them to the next year around 1 November.

Q: My Federation have several unassigned licences that we have not bought?
A: IOF Member Federations in membership fee groups 6, 7 and 8 are eligible for three IOF Athlete Licences free of charge. IOF Office plan to setup these unassigned licences to be used by these federations. If they are not pre-setup, please contact IOF Office.

Q: How do I find a list of all athletes that has signed the form?
A: Click on menu item Athlete Licences and choose *Manage Athlete licences for “My Federation”*, and choose the excel report: *Export all athletes that have signed or preliminary signed the form to Excel.*

Q: How do I find a list of all licenced athletes for a specific year?
A: Click on menu item Athlete Licences and choose *Export to Excel* in the upper menu. Select the specific year and open the exported excel report.

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**Document changes**

The last edition added all Athlete licence parts. Added document version and release date.
Reformatted some parts.