

## **Universal Membership System (UMS)**

The EBU is funded by subscriptions from its members collected on its behalf by affiliated clubs. In this system clubs submit their results from their duplicate sessions to the EBU through an online procedure. Timely submission of these files ensures that player's membership status is kept current, they regularly receive their magazines and diaries, their Master Points are credited, their National Grades are kept up-to-date, and other membership benefit eligibilities are maintained. It is thus important that the results files are submitted promptly, as soon as feasible after a club duplicate session is finished.

Normally, a club will send in a results file at the same time as it uploads its results to the club website. The upload process then only takes a couple of minutes. (Do not worry about any possible scoring errors in the initial submission, as a corrected file can be submitted later if necessary.) Prompt and regular submission will also ensure that the Club Treasurer receives timely statements that are easy to check, and payments from the club to the EBU are evenly spread.

### **The Club's Member Area**

My EBU is the membership area of the EBU website, and each club has a dedicated area where the Club Administrator or Scorer maintains the club's membership list, uploads session files, and can check the session files and the club's transaction statements.

To log in to the club's member area:

1. Go to the home page of the EBU website at [www.ebu.co.uk](http://www.ebu.co.uk)
2. Click on My EBU (button in the menu along the top of the page)
3. Log in with the club's (user) EBU number and password

Note that if you have forgotten the password, you can click on the Forgot Password? button after entering the club EBU number, and the EBU's automated system will email the password to the club's registered email address.

### **Adding new members**

For the benefit of your members, it is important that your club keeps its membership list up-to-date. To add a new member to your club's member list you will need their first and last names as well as their EBU number or their address with postcode.

1. Log in to the club's Member Area.
2. Click on the tab at the top labelled Members.
3. A list of Club Members will appear.
4. Click on the green 'Add member' button at the top of the member list
5. Click to say whether they already have an EBU record (if they don't skip to point 9). They will have an EBU record if they have ever been a member (including learning to play through a Bridge For All scheme), played in an EBU competition or taken part in an EBU or EBED course.  
Note: please be certain before you select No. Creating a duplicate membership record for someone can cause problems later on.
6. If you know their EBU number click 'yes'. If you don't, click 'no' and skip to point 8)
7. Type in their EBU number and click 'look up number'. If it is recognised as a valid number then a green box will appear giving the name of the player you are about to add. Assuming that it gives the correct person, click it to add them and you're done. If their name doesn't match then you perhaps have the wrong number. In that case click 'back' and then say you don't know their number, and then follow the following steps.
8. If you don't know their number, or the one you have seems to be wrong, then you can you search by name. Type their surname and first name, and click 'Look Up Name'. This will give you all options of members with that name. If you can see the right person, click 'add member' next to their name.  
If there are multiple people with the same name, then the town next to their name may help you to select the right one. If you are still not sure then please call or email the EBU office and we can help identify the right person.  
If they do not appear then consider possible variations on their name (Richard instead of Dick, or Elizabeth instead of Liz). Or, use only their surname – fine if they have an unusual name but if you only enter Smith then you may be looking for a needle in a haystack.
9. If you know that the player does not have an EBU record then clicking 'no' on the first screen allows you to create a new membership record for that player. On the first screen you will give name and date of birth. When you click 'create member' a second screen will open. At the top of this screen will be their new EBU number. It is on this second screen that you can give contact details and some membership preferences. You can change this information at a later date if you wish.

Please do not create a second EBU record for someone that already has one or has had one. If you cannot find the right person through steps 1-8 but you suspect they already have a record, please contact the EBU for assistance.

If you find that a second record has been created, then please let us know as it is possible for us to merge the records so they only have one active number (and Master Points are combined, etc).

## Removing lapsed members

If a player leaves the Club, you should remove their name from your Club's membership list on the EBU website. To do that:

1. Log in to the Club's member area on the EBU website.
2. Click on the tab labelled Members
3. Click on the relevant ex-member's name.
4. When their details appear, click on the red box in the bottom left corner which says 'Revoke membership'.

Note that removal from your Club's member list will not affect their EBU status if they are a direct member of the EBU or a member of another EBU-affiliated club.

For deceased members, please email the EBU membership helpdesk directly on [membership@ebu.co.uk](mailto:membership@ebu.co.uk)

## Session files

A session file is a summary of the results of a club duplicate along with the player's names and EBU numbers in a format that can be processed onto the EBU database. The file is created by the Club Scorer in the club's scoring program once a session has been scored. It is stored on the Scorer's computer and has to be uploaded to the EBU through the club's member area on the EBU website. During the upload process the system checks the player's names and EBU numbers against the EBU database to ensure that the correct players are credited. It is thus essential that the club's player database in the club's scoring program is maintained with the correct names and EBU numbers, otherwise there will be mismatches which will have to be resolved (see below).

## Session file upload process

The computer must be connected to the Internet. It is assumed that the Club Administrator or Scorer has previously entered the club's EBU number into the Club Details section of their scoring program.

If using EBUScore, the EBU's preferred scoring program, please refer to <http://www.ebu.co.uk/ebuscore-wiki/ebuupload1> for an explanation on how to create the XML file for uploading to the EBU. Instructions for uploading the XML file can be found at <http://www.ebu.co.uk/member-wiki/myebu:file-submission>.

In ScoreBridge the steps are as follows (similar in other scoring programs):

1. When you have finished scoring an event, stay on the Results page. (If uploading an event scored previously, highlight the event and click on Retrieve event.)
2. Click on the 'Make File' tab in the top menu.

3. Select 'P2P File'.
4. In the box which pops up click Yes if your web browser (e.g. Internet Explorer) is not already open at the club's member area on the EBU website, No otherwise.
5. ScoreBridge will store the file for the current session on your computer's Desktop. Note that this file will replace any previous session file there.
6. ScoreBridge will then automatically find the member area login on the EBU Website. The cursor should be blinking in the box labelled 'User' and holding down Ctrl while pressing V should paste your User (=Club) number into the relevant box. (If not, type it in.) Type your club's password (case sensitive!) into the password box and click on 'Login'.
7. Click on Submit (top right). Click on Browse to find the session file you just made. It will be in the 'EBU P2P Files' folder on your computer's Desktop. You may find that the new window opens immediately in the right place and you can see the session file – the file name has the date of the session followed by two exclamation marks. If not, check at the top of the new window to make sure you are viewing the computer's Desktop. (If your window is not showing the Desktop, look at the menu on the left and click on Desktop.) In the list find a folder called "EBU P2P files" and double-click on that. You will then see the P2P file with the session date.
8. Double-click on the session file. This window will now close.
9. Click on 'Upload'.
10. The system then imports the file and checks the player's names and EBU numbers against the EBU's records. You can watch progress on the status bar which appears.
11. If all players match EBU records, the status bar will turn entirely green. Then click on Submit. When the process has finished, you will see a message saying Submission successful, and you are done and can log out. If the status bar is not entirely green, continue with step 12.
12. If any names come up with red crosses against them, the system has not been able to match those players with EBU records, and the mismatches have to be resolved before the upload process can be completed.

### **Resolving mismatches in the upload process**

Mismatches occur for a number of reasons. Frequently, it is because the player is not a Club or EBU member and is simply visiting the club. In some cases it is because there is a typo in the player's name or EBU number. The player may be new and wishing to (re)join the Club/EBU. To resolve a player mismatch:

1. Click on the red cross next to the player's name.
2. If you have the player's EBU number, input that in the relevant box and click on Search for this number. If not, click on Search for this name.
3. If the player already has a record/EBU number, the name will appear below. If there are multiple results, the location given next to the player's name should usually make it clear which is the record you are looking

for. Click on the correct name and the player will be resolved. **Don't forget to enter the player's EBU number carefully into the Club's player database in the Club's scoring program to prevent future mismatches.**

4. If the search does not produce the correct result, either
5. Click on This player was a guest, and the player will be resolved with no further questions. Note that in this case the player will not have the session recorded and will not receive Master Points or Magazine Points unless the session is edited later.
6. Click on This player requires a new EBU record, in which case you will need their address to make them a member of your club and the EBU. Fill in the details and click Submit.
7. When all players have been resolved, click on Submit to complete the upload. When the process has finished, you will see a message saying Submission successful and you can log out of the member area.

## **Rescoring an event**

If there is an error in the scoring then until it has been processed (usually in the second week of the following month) you can delete the incorrect session and then submit a correct version. To delete the session log on to the club members area, click on the name of the result and when the results appear on screen then click the 'Delete Session' button. Then click Submit and follow the process above to submit the corrected session.

## **Minor amendments to session files**

In most cases it will be best to resubmit a session file after deleting an incorrect one, but in some cases more minor amendments can be made directly to a session file that has already been uploaded. E.g. if you have put the wrong player in, you can change the player's name in the file directly:

1. Log in to the club's member area on the EBU Website.
2. Click on the 'Sessions' tab at the top.
3. Click on the name of the relevant session.
4. Click on the player's name.
5. Input the correct EBU number for the player
6. Click Save
7. Click Close

## Submitting 'result only' session files

In some cases, e.g. for club ladders, a club may need to send a file in to the EBU which is just a list of players with the Master Points and/or percentages achieved. You can produce such a session file in ScoreBridge as follows:

1. Open ScoreBridge.
2. Click on 'New Event'.
3. In the 'New Event Profile' window tick the 'Result Only' box towards the bottom right and under EBU P2P Charge Rate Types select 02 Null Session.
4. Click on OK.
5. Enter the names and final results and/or Master Points.
6. Proceed as normal with making and uploading the P2P file as above.

## Transactions

In order for the Club Treasurer to keep track of the Club's Universal membership subscription payments, the EBU provides transaction details in the form of PDF files in the Club's Member Area. To view the Club's transactions:

1. Log in to the club's Member Area.
2. Click on the Statements tab at the top.
3. In the column headed Ref are all the Invoices giving a summary of the amounts charged/credited. Click on the name to view.
4. In the column labelled Session Summary are statements which give a detailed breakdown by player sessions for that Invoice. Click on the name to view.

If clicking on the name does not work, you will need to download and install Adobe Reader (or an equivalent program) on your computer. This is a free download from <http://get.adobe.com/reader/>. Since PDF files are very common, Adobe Reader is a useful program to have.

Occasionally people have difficulty opening the PDF file in the browser even if they have Adobe Reader installed. This is usually because they are using an old web browser (e.g. Internet Explorer 6) or it hasn't been completely updated. What should always work is saving the PDF file to your computer (right-click the Adobe symbol and 'save target as') and opening it from there.

## Club Administrator access to members' details

There are restrictions due to the Data Protection Act. Clubs do not have the right to view personal details about members unless those members have given the EBU permission for the club to do so. In the case of new members created

by the club in the first place, this permission is assumed, because everything the EBU knows about the member was given to us by the club in the first place.

However, in the case of members who already had EBU records, we need their consent, because we may have information on our records which should not be privy to club administrators. Members can give this consent through their personal area of My EBU on the EBU website, where they can also amend their records if necessary. If they don't have Internet access, they or the club administrator can contact us directly if anything needs updating.

## **Administrators and Scorers**

Clubs may wish to restrict full administrator rights in the online UMS management to a limited number of people. Anyone to whom the club gives the club's EBU number and Member Area password will have administrator rights and can view all the information in the club's Member Area. In many clubs the Administrator(s) and Scorer(s) will be one and the same, but a club may designate extra scorers (without full administrator rights) who can upload the club's session files at the end of a session, but are not able to access and amend the club's Member List. To designate a new Club Scorer:

1. Log in to the club's Member Area
2. Click on the Members tab at the top
3. Click on the relevant Member's name
4. Click on the box midway down the screen where it says "Tick to make this member a scorer (they can submit results on behalf of the club)".
5. A pencil symbol will appear in the Member List next to the new Scorer's name.

The new Scorer can now upload session files by logging in to their own personal Member Area on the EBU website and clicking on Upload at the top. The process is then as described above, under file upload process, but the Scorer will not be able to add or remove Club Members. If a new member has played in that session, the Scorer's only option will be to put them in as a guest. If they have joined the club as a new member, a Club Administrator will have to add them to the club's Member List later and, if necessary, amend the Session file to reflect that.