

Pianola User Guide for Club Managers

How to manage your bridge club using Pianola

Contents

Thank you for using Pianola. This user guide covers the main features of Pianola. If you have any questions that aren't covered in this guide, or have any suggestions please contact us by emailing support@pianola.net.

Admin Dashboard	3
Members	4
Viewing and editing a member's record	
Adding a new member	
Invites	
Exporting your data	
Groups	8
Simple groups	
Smart groups	
Messages.....	10
Smart groups	12
Combining smart groups	
Reports	13
Results.....	14
Settings.....	15
Club details	
Logo	
Regular sessions	
Renewals	
Widgets	
Roles and permissions.....	16

Admin Dashboard

The Dashboard shows you a snapshot of your club's activity:

- number of tables played
- recent new members
- most frequent guests
- recently played sessions
- sent messages
- Email groups

Click on a member's name to go to their membership record, or on a recent session, sent message or email group to go to the respective page.

The recent sessions shows the current upload status of each session - whether it has been published for members.

The screenshot shows the Pianola Admin Dashboard with a navigation menu and several data sections. At the top, a yellow banner reads "Thank you for helping us test Pianola. We're currently in beta - find out what this means." The dashboard includes a navigation bar with "Dashboard", "Members", "Groups", "Messages", "Results", and "Club settings".

Tables

LAST 7 DAYS	PREV 7 DAYS	LAST 30 DAYS	PREV 30 DAYS
42 tables played in last 7 days			
Most frequent players			
	EBU #	Played	
Frank Leigh	436180	3	
Sylvia Symons	92618	3	
Dorothy Whittall	52315	3	
Pamela Adler	436106	2	
Sue Friedman	430138	2	

Members

NEWEST MEMBERS		MOST FREQUENT VISITORS	
Name	EBU #	Date joined	
Tricia Gerstein	436154	21 Nov 2011	
Howard Newman	304538	17 Nov 2011	
Andrew Nelson	465774	17 Nov 2011	
Martin Kaitzer	465773	17 Nov 2011	
Richard Cross	459917	16 Nov 2011	

Recent sessions

SESSION NAME	Results published	Uploaded to EBU
13 DEC Tuesday Pairs	Results published	Uploaded to EBU
12 DEC Monday Pairs	Results published	Uploaded to EBU
10 DEC Saturday Pairs	Results published	Uploaded to EBU

Sent Messages

SUBJECT
7 DEC Hosting
5 DEC LBC Christmas Party
5 DEC LBC Christmas Party

Groups

MEMBERS	GROUP NAME	Manage	Message
9	Duplimators	Manage	Message
56	Hosts	Manage	Message
18	Tournament Directors	Manage	Message

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Members

Shows a list of everyone who has played at your club, or is on your membership list.

By default, the list is filtered to show just current, active members. However, you can change the filter to show just members in a specific category, visitors, people who have left the club, or members with missing information.

Start typing a member's name to search. The list will reduce as you type.

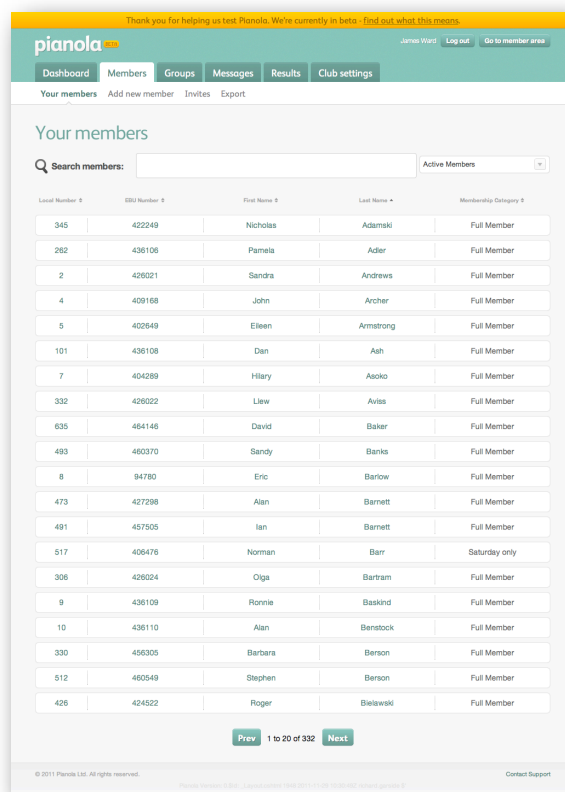
Click on a member's name to visit their membership record.

When someone plays in your club who isn't on your existing membership list they are automatically added to Pianola as a visitor.

This means that you can track how frequently an individual has played as a visitor. You may also choose to collect contact information for visitors so that you can email them later (perhaps to encourage them to join your club).

When one of your members leaves the club you can edit their record to reflect that fact and the reason why they have left:

- Lapsed (ie not renewed their membership)
- Resigned (eg a member who has moved away)
- Passed away
- Other



Viewing and editing a member's record

Clicking on a member's name gives you access to their full record.

All Club administrators can view and edit membership records. By default, records are 'locked' so they cannot be edited inadvertently. Click on the Edit button to unlock the record.

This page shows you when the user last logged in to Pianola, and provides a link to their full play history.

Numbers

The member's ABF number, local membership number, current ABF rank and current handicap (if uploaded).

Details

Name, email, custom field information and Pianola username.

Phone numbers

Landline and mobile numbers.

Address

Postal / home address.

Membership

The current membership status of the member and the date they joined.

Resignations

Information about when and why the member has left, if applicable.

Notes

You can make private notes here. They will be visible to other admins but not visible to the member.

Roles

See Roles and Permissions for more information.

The screenshot shows the Pianola web interface for a member's record. The page is titled "James Ward" and includes an "Edit James Ward's record" button. The record is divided into several sections:

- Pianola details:** Shows the last login time (13:07 on Monday 20 January 2014), role (Club administrator, Club member), and username (jamesward).
- Membership details:** Lists EBU # (422741), local membership number (321), membership category (Full Member), date joined club (08 Sep 2011), membership paid until (31 Mar 2014), and reason for leaving club (Not left).
- Performance details:** Shows EBU Rank (Area Master), handicap (-2.76 since 09 Sep 2013), EBU NGB grade (%) (46.07 %), EBU NGB band (Six), and average score (46.0 %).
- Contact details:** Includes a profile picture, a map of the member's location (Flat One, 4 Shaftesbury Avenue, Leeds, West Yorkshire, LS8 1DT), title (Mr James Ward), initials (J. R.), DOB (10 May 1971), mobile number (07787 977825), and email (james@pianola.net).
- Private notes:** A section for adding notes, currently showing "No notes yet".
- Last 10 games:** A table showing the member's recent performance in various sessions.

Date	Session	Score	Regular session
14 Jan 2014	Tuesday Night Pairs	36.74%	Tuesday Pairs - Main Section
07 Jan 2014	Leviton Trophy	49.43%	Tuesday Pairs - Main Section
19 Dec 2013	Thursday Pairs	43.75%	Thursday Pairs
14 Dec 2013	Christmas Party	46.77%	Saturday Pairs
10 Dec 2013	Tuesday Night Pairs	46.21%	Tuesday Pairs - Main Section
19 Nov 2013	Joint Handicap Pairs	62.12%	Tuesday Pairs - Main Section
12 Nov 2013	Tuesday Night Pairs	53.03%	Tuesday Pairs - Main Section
05 Nov 2013	Monty Simons Cup	49.42%	Tuesday Pairs - Main Section
29 Oct 2013	Tuesday Pairs	44.49%	Tuesday Pairs - Main Section
22 Oct 2013	Tuesday Pairs	32.20%	Tuesday Pairs - Main Section

Adding a new member

There are two ways you can add a new member to Pianola:

1. By adding a new player's information before they have played in a session
2. By converting a visitor into a member after they have played in a session

Go to Members > Add new member

Enter the member's name and / or ABF number. We'll search your Pianola records to see if they already have a record. If so, you can edit their record to show their current membership details.

If not, you can create a new record and add all the new member's details.

Invites

You need to send an email invite to each of your members so that they can login to Pianola for the first time and set up their account on the system (choose a username and password, and select their privacy options).

The invite email is send from your club's email address and uses this text:

```
From: <the name of your club>
Subject: Welcome to Pianola
Message: Dear <first name>

<Name of your bridge club> has started using Pianola, a new service for
bridge clubs that provides you with a personal history of your bridge
results, analysis of your performance, a member directory and a
partner-finder.

To setup your account, choose a username and a password. You will need
these to login to your account in the future.

Click here to create a username and password

If that link doesn't work, or you are having any other difficulty setting
up your account, please email support@pianola.net.

(The link in this email is unique to you, <full name>. It will not work
for anybody else.)
```

You can send invites in three ways:

1. To an individual, by clicking on the link in their membership record
2. To a group that you have already created (see Groups)
3. To all your members for whom you hold an email address

To send to a group or all your members, go to Members > Invites.

Exporting your data

We take multiple backups of your data each day, but you can also take a backup copy of your membership data as often as you like.

Go to Members > Export and download your membership data in CSV format.

Groups

You can create groups of your members in order to send targeted emails and letters. Pianola offers two types of groups:

1. Simple groups
2. Smart groups

Simple groups

Simple groups are lists of members that are unlikely to change very frequently. Here are some examples:

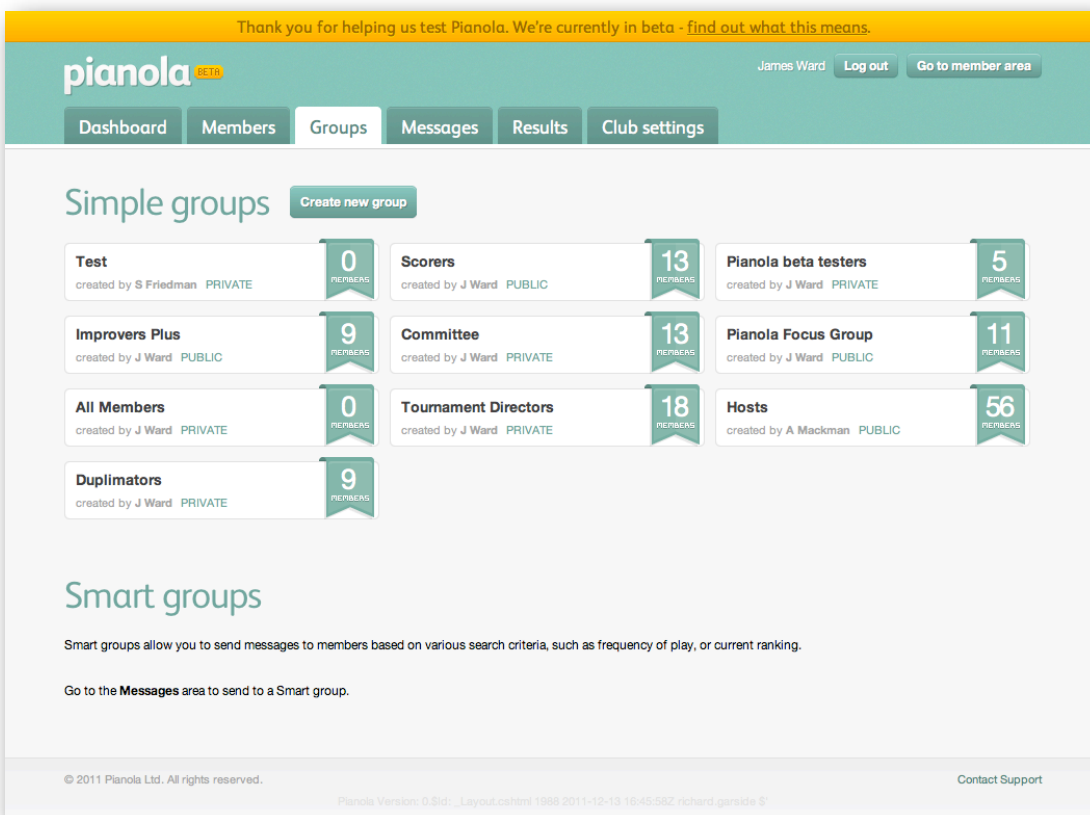
- Committee
- TDs
- Scorers

You can also make your simple groups 'public'. This means that your members can opt in to these groups. Here are some examples:

- Improvers
- Hosts

Creating a simple group

To create a simple group, go to Groups and click on Create new group.



Give the group and name and a description. The description is especially important if you're creating a public group as it will help your members decide whether or not to join. Include some information about who the group is aimed at and what kind of content you will be sending.

Click Save and edit members.

Put a tick against the people you want to include in this group and click Save.

The screenshot shows the 'Edit members of Scorers' page in the Pianola admin interface. At the top, there is a navigation bar with 'Dashboard', 'Members', 'Groups', 'Messages', 'Results', and 'Club settings'. Below this is a search bar with the text 'Search members: Start typing here to search...'. The main content is a table of members with columns for 'Name' and 'Category'. Each row has a checkbox on the right for selection. The table lists 20 members, with the first 15 having 'Full Member' as their category and the last 5 having 'Full Member' or 'Visitor'. A 'Save' button is located at the bottom left of the table. At the bottom of the page, there is a footer with copyright information and a 'Contact Support' link.

Name	Category	
Sandra Andrews	Full Member	<input checked="" type="checkbox"/>
Angela Buckley	Full Member	<input checked="" type="checkbox"/>
Peter Doerfler	Full Member	<input checked="" type="checkbox"/>
Sue Friedman	Full Member	<input checked="" type="checkbox"/>
Alan Harte	Full Member	<input checked="" type="checkbox"/>
Jacqui Jackson	Full Member	<input checked="" type="checkbox"/>
John Kitteridge	Full Member	<input checked="" type="checkbox"/>
Gillian Mapstone	Full Member	<input checked="" type="checkbox"/>
Stephen Mapstone	Full Member	<input checked="" type="checkbox"/>
Jonathan Spry	Full Member	<input checked="" type="checkbox"/>
Christina Turner	Full Member	<input checked="" type="checkbox"/>
James Ward	Full Member	<input checked="" type="checkbox"/>
Brian Ziff	Full Member	<input checked="" type="checkbox"/>
Nicholas Adamski	Full Member	<input type="checkbox"/>
Pamela Adler	Full Member	<input type="checkbox"/>
Tina Andersson	Visitor	<input type="checkbox"/>
Marie Appleby	Full Member	<input type="checkbox"/>
Ron Appleby	Full Member	<input type="checkbox"/>
John Archer	Full Member	<input type="checkbox"/>
Eileen Armstrong	Full Member	<input type="checkbox"/>

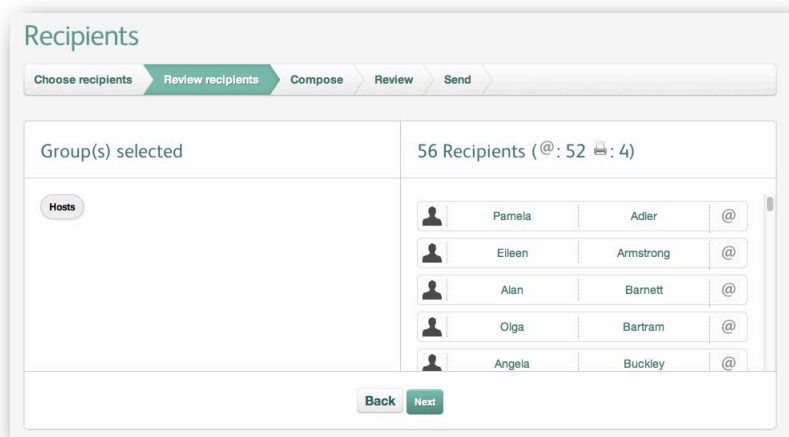
Smart groups

Smart groups allow you to identify segments of your membership based on their play history, ranking or membership status. You'll find smart groups in Messages and Reports.

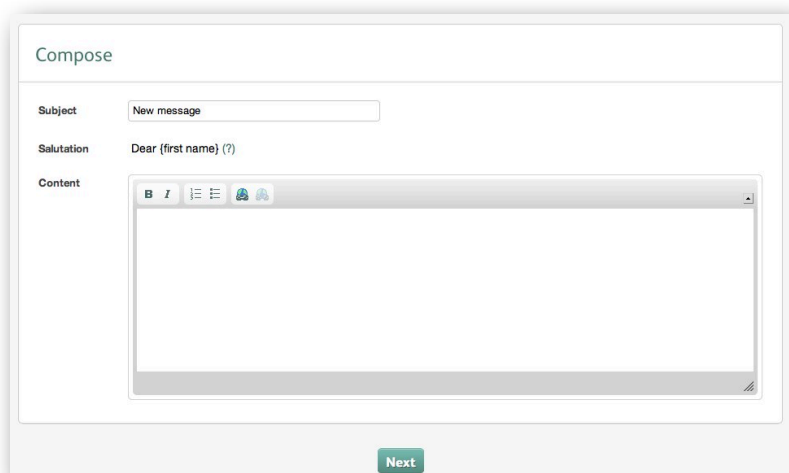
Messages

You can send message by email to all the members for whom you hold an email address, and Pianola creates a letter version for any members who don't have an email address.

In Messages, you will see a list of all the simple groups you have created. To send to one of these groups, just select it and click Next.



You'll see a list of the recipients in this group, the number of people who have email and the number of people who will need a letter version. Click Next.



Compose your subject line and message. Pianola sends an individual email to each recipient (not cc or bcc) and inserts their first name. You have some formatting options: bold, italics, lists and links. Click Next.

You can add an attachment to your email.

On the next screen, you can review your email and send yourself a test version if you want to check how it will look when delivered.

Review email

Choose recipients > Review recipients > Compose > **Review** > Send

To: Hosts [Edit groups](#)

Subject: New hosts rota [Edit subject](#)

[Edit message](#)

Leeds Bridge Club

We are currently drawing up the new hosts rota. Please contact Anne Mackman to add your name to the list.

[Next](#)

Send a test email

This is optional, but you can send yourself a test email to check if everything looks right. (It may take a minute or two for the email to arrive)

Send test email to:

[Send test](#)

If you are happy with your message, click Next, which will bring you to the Send screen. Click Send to x emails to send by email, and click Download letter as PDF to print a letter for the recipients without an email address.

Send

Choose recipients > Review recipients > Compose > Review > **Send**

Emails

[Send 52 emails](#)

[Download Letter as PDF](#)

Smart groups

Within Messages you can also send to 'Smart groups'. These groups are based on live data from your Pianola records.

The smart groups we currently offer are:

- Played more than
- Played less than
- Ranking greater than
- Ranking less than
- Attended a regular session
- Stopped attending a regular session
- Birthdays
- Custom field
- All current members
- Left club (lapsed / resigned / other)
- Visitors

After selecting a Smart group, continue with sending the message in the same way as for a Simple group.

Played more than / played less than

Identify your most frequent players, or people who haven't played much recently. For example, to identify who hasn't played in the past month, search for people who have played less than 1 time.

Ranking greater than / ranking less than

Send emails to your members based on their current ranking.

Attended a regular session

Identify all the players who played in one of your regular sessions between two dates. For example, if you run an improvers session you might want to invite them to a new class you are running.

Stopped attending a regular session

This smart groups allows you to identify people who did attend a regular session for a certain number of times, but who haven't been since. If you notice numbers are dropping for one of your games, use this smart group to send an email to the people who have stopped coming.

Birthdays

Identifies people who birthday falls between two dates you specify.

All current members

All the people who are listed as current members in your club. This excludes visitors and players who have let their membership lapse, or have resigned, or have passed away.

Left club

You can send a targeted email to just the people who have let their membership lapse, or who have resigned.

Visitors

All the people listed as having played at your club as a visitor.

Combining smart groups

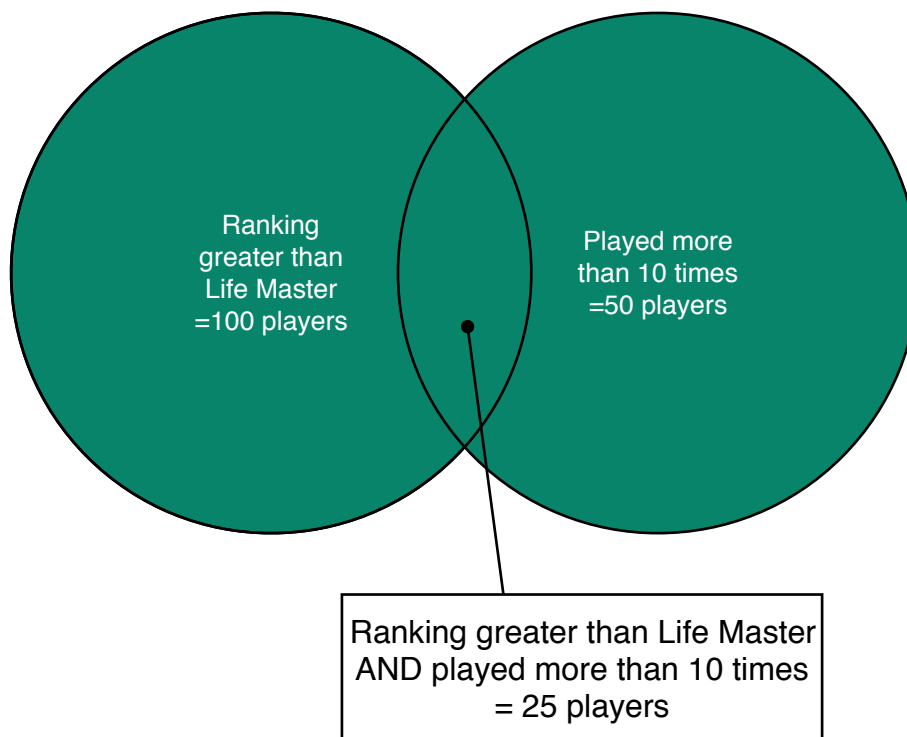
You can combine more than one smart group together to form complex queries. When you do so, you'll need to specify whether you want Pianola to identify players who match **ALL** your smart groups, or match **ANY** of them.

ALL

Choosing ALL will select only people who appear **in every single one** of the smart groups that you've selected. This will typically be a shorter list. In a Venn diagram it's the area of overlap - so 25 players in the example shown below..

ANY

Choosing ANY will select people who appear in **one or more** of the smart groups you've selected. This will typically be a longer list. In a Venn diagram below, it's the entire area of all the circles - so 150 players in the example shown below.



Reports

Reports allow you to run the same queries as smart groups but view the results on screen or download as a CSV.

Results

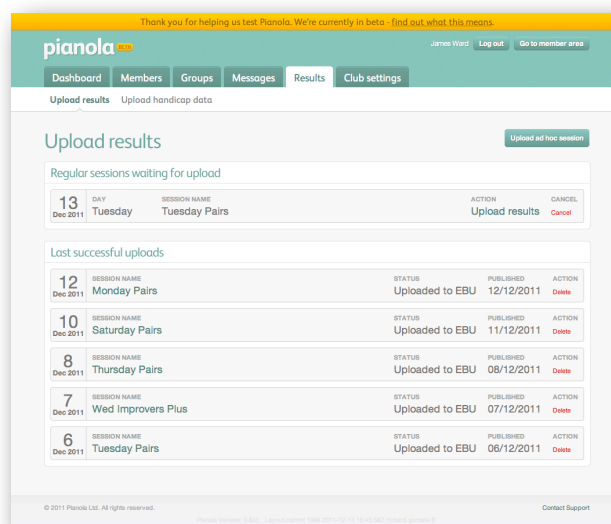
When you upload results into Pianola we automatically:

- Publish them to the web so your members can see them
- Update all your players' averages and personal histories

At the end of the session create the XML file from your scoring program

Pianola knows what regular sessions your club holds (see Settings) so will be expecting results whenever you have had a game. Click Upload results for the session you have just completed.

Choose the XML file and the hand record file from your PC's hard drive and click Upload results. We currently accept PBN or TXT hand record files, which can include makeable contracts if your dealing software produces the double dummy analysis.



Upload results for Tuesday Pairs – Tuesday 13 December 2011

- 1 Choose the results file**
This is known as the P2P file (or XML file) and is generated by your scoring software
Choose results file (P2P or XML):
 No file chosen
- 2 Choose the hand record file**
This is the file generated by your dealing software. We currently accept PBN or TXT files
Choose hand record file (TXT or PBN):
 No file chosen
- 3 Is your event handicapped?**
If so, check this box to apply the latest handicaps you have uploaded
 Apply handicap

Settings

This section is where you specify the relevant settings for your club.

Club details

Name, address, email. Also choose how contract information is displayed.

Logo

Upload a logo and it will be used in your news feed posts and on any letters you print.

Regular sessions

Set up your club's regular sessions so that Pianola knows when to expect results.

Renewals

Set whether your club sends membership renewals once a year or on a rolling month-by-month basis.

Widgets

Code you can insert into your club's existing website to generate 'login to Pianola' buttons and a results calendar.

Roles and permissions

There are three roles in Pianola:

- Club member
- Results uploader
- Chief scorer
- Secretary
- Membership secretary
- Club administrator

You assign roles to individual members to give them access to the parts of Pianola that are relevant to them.

All members are assigned the role of 'Club member'. This gives them access to the member features of the product (results history, news feed, partner-finder).

To assign admin rights to a member, edit their individual membership record.

Read more about roles and permissions in our help centre:

<http://support.pianola.net/customer/portal/articles/823126-roles-and-permissions>