Bacta Self-Exclusion Services Application

USER MANUAL GUIDE

Purpose of the document

This document describes the bacta self-exclusion services application. Each section below describes and showcases specific functionality and provides instructions on how to use the application.

This document is intended to guide Supervisor and User access level to use the application.

The application is always accessible at url: https://www.bacta-selfexclusion.org.uk

Contents

1. PRESENTATION OF THE SOLUTION

1.1 BRIEF DESCRIPTION

The bacta Self-Exclusion Services Application is an online portal used to exclude customers from their and other operator AGCs / MSAs.

1.2 DESCRIPTIVE ICONS

	Edit Record
	Add New Record
	Delete Record / Close Window
	Save Record
	Cancel Changes

All Mandatory fields in the application are marked with *****

1.3 SUPPORT

For any support request please contact bacta.

2. CONNECTING TO THE APPLICATION
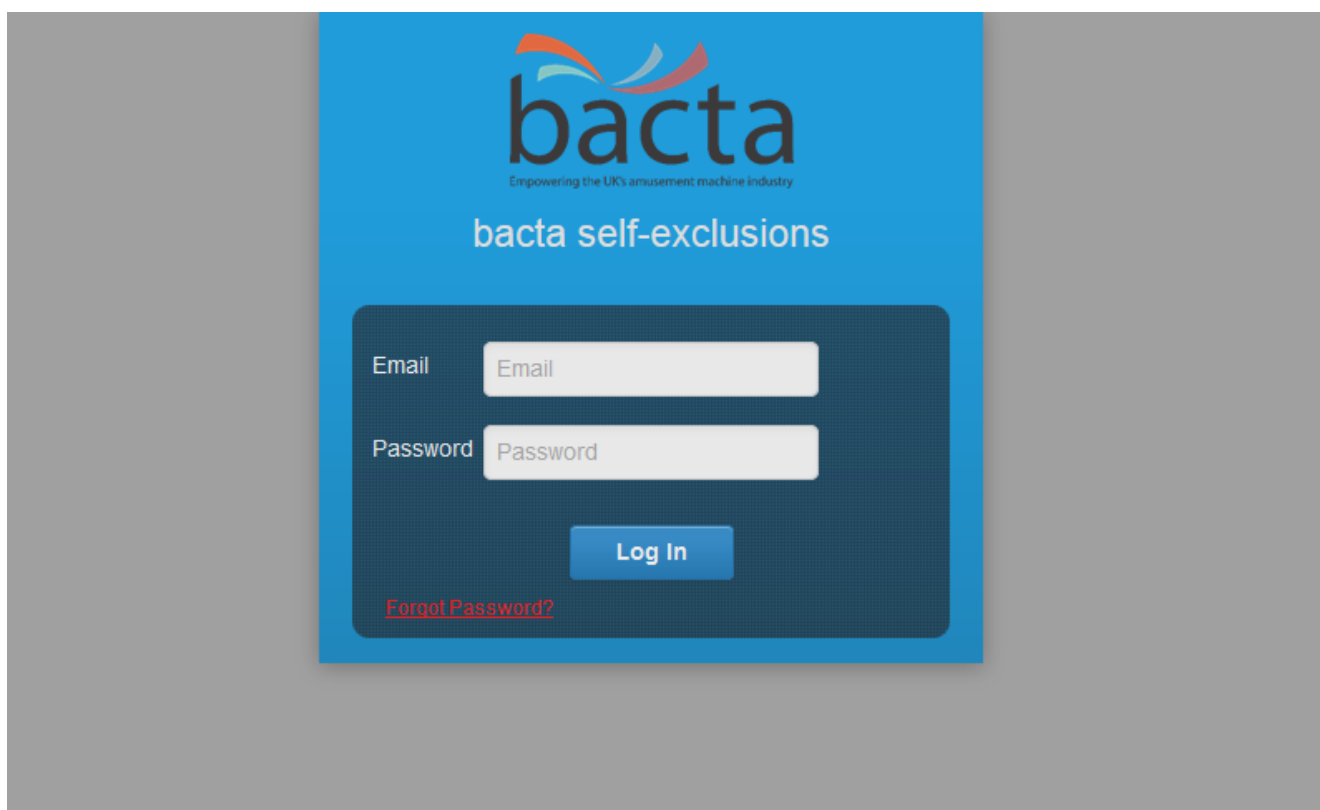
2.1 ADDRESS

You must connect to the application using the following address:
https://www.bacta-selfexclusion.org.uk

2.2 AUTHENTICATION

For Authentication user should enter their registered email id for the user name and password.

If the access is unauthorized an error message is displayed in red.

When you have signed the T&C's with bacta Self–Exclusion Services Ltd (BSESL) a Supervisor user account is created for your organisation and you will be informed of the login credentials.

At the time of first login you will be prompted to change the temporary password provided by bacta.

3. STRUCTURING OF THE APPLICATION

3.1 LAYOUT

All modules of the application can be accessed from the top menu. Based on your access level the menu will show more or less items.
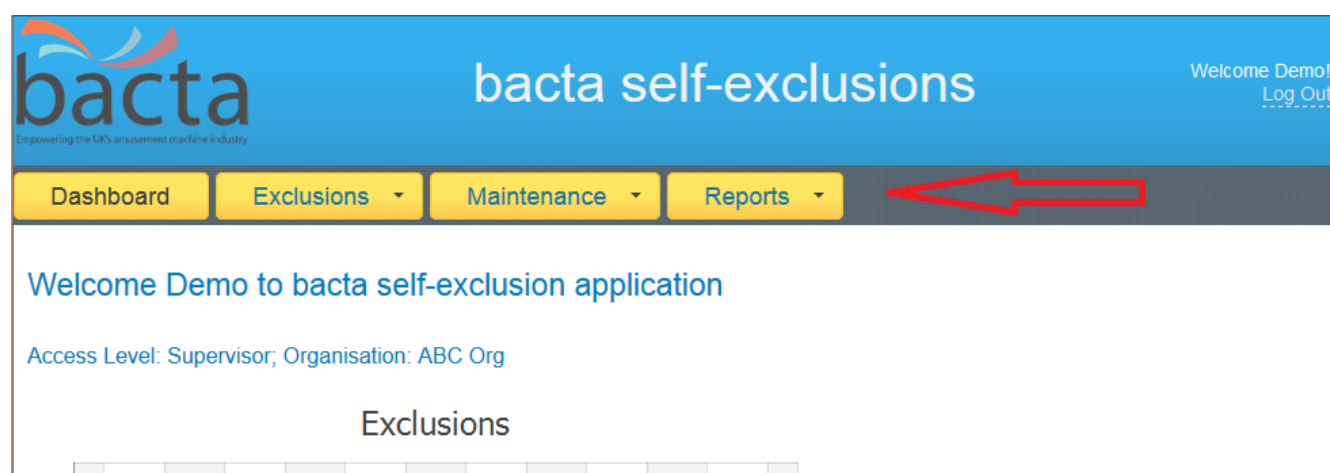
3.2 FUNCTIONALITIES

The functionalities that will be described in this document are:

- Maintenance
  - ➢ Add/Update Sites
  - ➢ Add/Update Users
  - ➢ Data Customisation

- Exclusions
  - ➢ Adding New Exclusion
  - ➢ Recording Breach
  - ➢ Reinstatement
  - ➢ Photo Gallery

- Reporting
- Forgot Password

4. ADD/UPDATE SITES

Only Supervisor users can add / update site information for their organization

STEP 1: Navigate to Maintenance > Sites in the top menu of the application
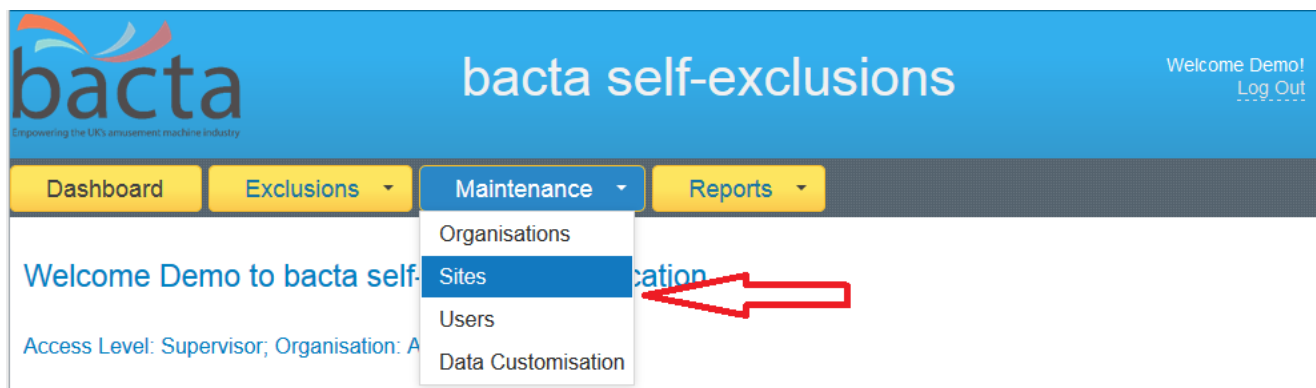
STEP 2: The screen will now show a list of all sites that have been added for your organizations

STEP 3: Click on the button "Create New Site"

STEP 4: Enter the details of the site in the form displayed

New Site

Details

Site Name*:	Example Site 2
Site Code*:	1122
Organisation*:	ABC Org
Site Type*:	AGC
Location Code*:	
Status*:	Open
Region Code:	
District Code:	

Address

Postcode*:	SO53 1JP
Address 1*:	
Address 2:	
Address 3:	
Town/City*:	
County:	

Opening Times

Sunday:		To	
Monday:		To	
Tuesday:		To	
Wednesday:		To	
Thrusday:		To	
Friday:		To	
Saturday:		To	

Save

When you enter the postcode, a pop up will display a list of addresses for the postcode entered. Select the address of your site and click on the button "Use Selected Address". On doing so, the address will be populated automatically.

- Site Code is the unique reference of your site used within the organisation. If you do not have one please enter a unique code like 1, 2, 3 etc for all site you need to add.
- Location code is mandatory for MSA Organisation Sites
- Region Code can be used if you would like your supervisors to have access only to certain sites. More details can be found in the Add User section

Enter all your site information and click on save button. On successful save, the browser will display the success message. If not an error message is displayed by highlighting the fields that require correction. You will need to hover on the icon to see the error relating to the field

STEP 5: Add any site contacts by clicking on Add new contact button. When new exclusions are added and if the exclusion is in the site vicinity then an alert email will be sent out to these contacts.

Update Site Details

Back to Sites List

Details

Site Name*:	Example Site 2
Site Code*:	1122
Organisation*:	ABC Org
Site Type*:	AGC
Location Code*:	
Status*:	Open
Region Code:	
District Code:	

Address

Postcode*:	SO53 1JP
Address 1*:	
Address 2:	
Address 3:	
Town/City*:	
County:	

Opening Times

Sunday:		To
Monday:		To
Tuesday:		To
Wednesday:		To
Thrusday:		To
Friday:		To
Saturday:		To

Save Add New Contact

Site Contacts

Title	First Name	Surname	Position	Email	Telephone	Mobile

No contacts found for this site

To Update Site Details:

➢ Navigate to Maintenance > Sites
➢ In the listing screen click on the edit icon

Sites
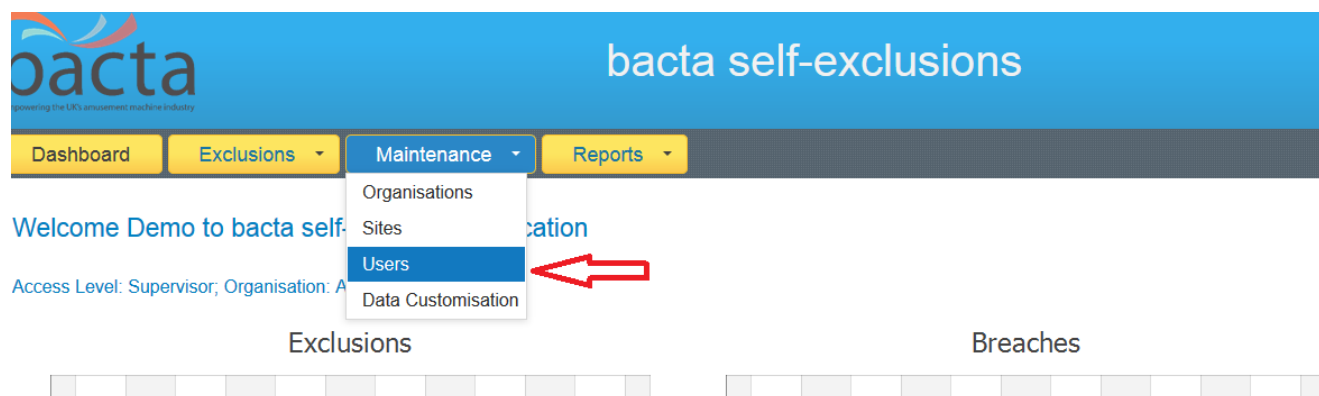
Create New Site

Select Organisation: ABC Org

|	Name	Site Code	Town	Postcode	
🟢	Example Site 1	1234	Eastleigh	SO53 1JP	✏️
🟢	Example Site 2	1122	Eastleigh	SO53 1JP	✏️

5. ADD / UPDATE USERS

Only Supervisors can add other users.

STEP 1: Navigate to Maintenance > Users in the top menu of the application

STEP 2: The screen will now show a list of all users that have been added for your organizations / Sites. This listing will be shown only to supervisors. If you have only 'User' access level then the screen will display your user account information rather than the listing screen.
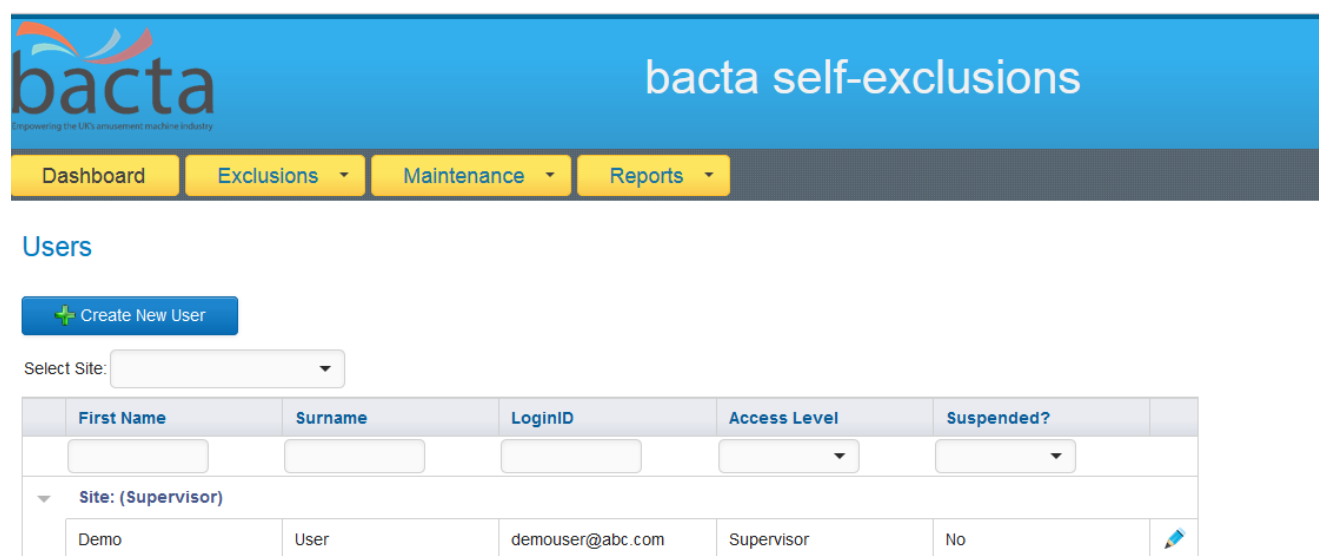
STEP 3: Click on the button "Create New User"

STEP 4: Enter the details of the user in the form displayed

Details

Title*: [▼]   First Name*: [   ]

Surname*: [   ]   Access Level*: [User   ▼]

Organisation*: [ABC Org   ▼]   Site*: [▼]

Email*: [   ]   Delegate Email*: [   ]

Telephone*: [   ]   Mobile: [   ]

Position*: [   ]   Region Code: [   ]

Suspended*: [No   ▼]

Login Details

Username*: [   ]   Password: [   ]

Confirm Password: [   ]

Features

☐ Add Self-Exclusion   ☐ Record Breach

☐ Reinstatement   ☐ Photo Gallery

Reports

☐ Excluded Customer Photo Gallery   ☐ Excluded Customers List   ☐ Self-Excluded Breaches List

☐ Self-Exclusion Breaches Volume   ☐ Excluded Customers Volume By Week   ☐ Lapsed / Reinstatements Volume

[💾 Save]

NOTES:
- ➢ Supervisors will be able to set up other users with access level either Supervisor or User.
- ➢ For User access level, it is mandatory to select the site as well
- ➢ Email is the user name for the user account
- ➢ Delegate Email should be the email of higher authority in the organisations who can monitor the alerts and user account for this user.
- ➢ Region code can be used only for Supervisor user account. When used, the user will be able to see only the sites with matching Region Code as described in the earlier section.
- ➢ The Password has to be 6 to 10 characters with at least one uppercase, one lowercase alphabet and one number.
- ➢ Select all the features that the user can do when logged in
- ➢ Select the reports that a user can have access to.

Enter all information and click on save button. On successful save, the browser will display the success message. If not an error message is displayed by highlighting the fields that require correction. You will need to hover on the icon to see the error relating to the field.

To Update User Details:

➢ Navigate to Maintenance > Users
➢ In the listing screen click on the edit icon

6. DATA CUSTOMISATION

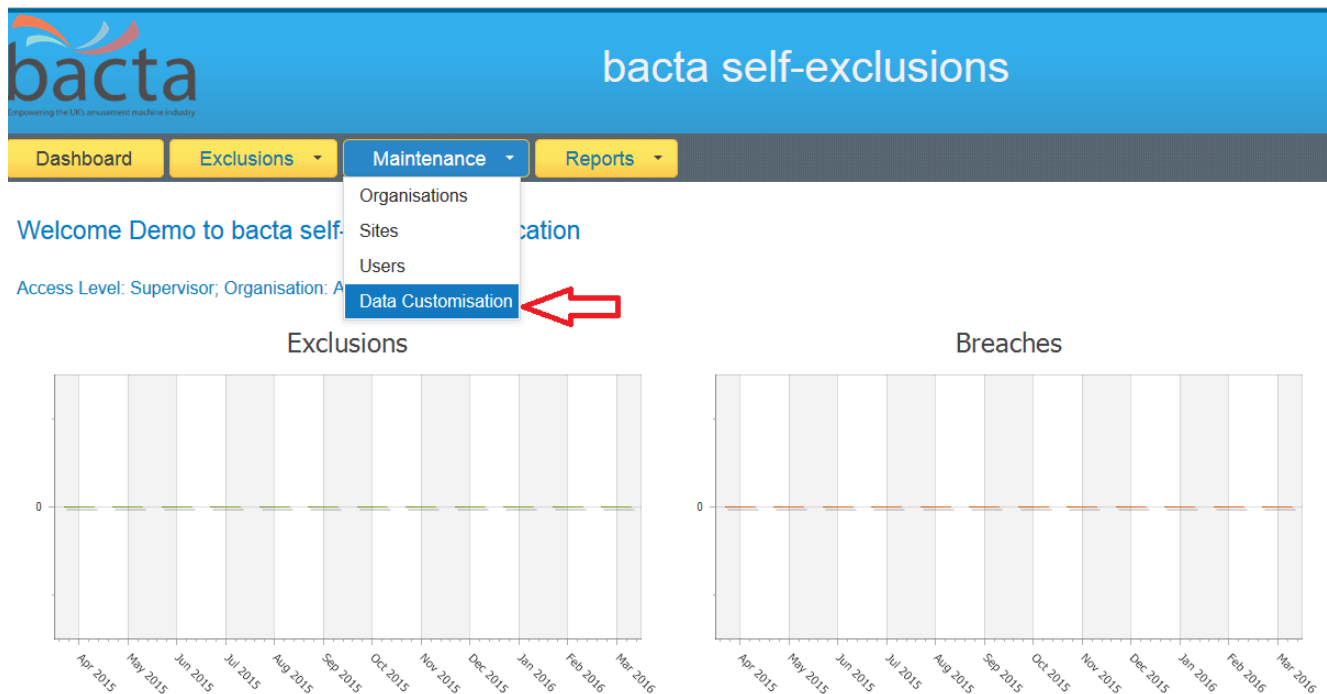Only Supervisors set the customisation of the fields that need to be displayed / mandatory when entering a self-exclusion.

STEP 1: Navigate to Maintenance > Data Customisation in the top menu of the application

STEP 2: In the listing screen, set which ever field you would like display/hide or to make mandatory/non-mandatory by clicking on the edit icon

Example 1: Setting Birth Date As Non Mandatory

a) Click on the Edit icon 🖉
b) Set Mandatory to No

c) Click on Save icon 💾

On doing so, when entering an exclusion the user will not be prompted to enter Birth Date. The field is completely optional to be used by the user.

Example 2: Setting Birth Date Not To Display

a) Click on the Edit icon 🖉
b) Set Display to No (Mandatory field automatically changes to No and is not editable)

c) Click on Save icon 💾

On doing so, the birth date field is not displayed in the exclusion form and hence this information cannot be recorded for the exclusion.

Follow the same process for the other fields you wish to display or not and which you wish to make mandatory or not.

7. ADD EXCLUSION

This feature is available only if the user account is enabled to use this feature.
To add a new exclusion:

STEP 1: Navigate to Exclusions > Add New Exclusion
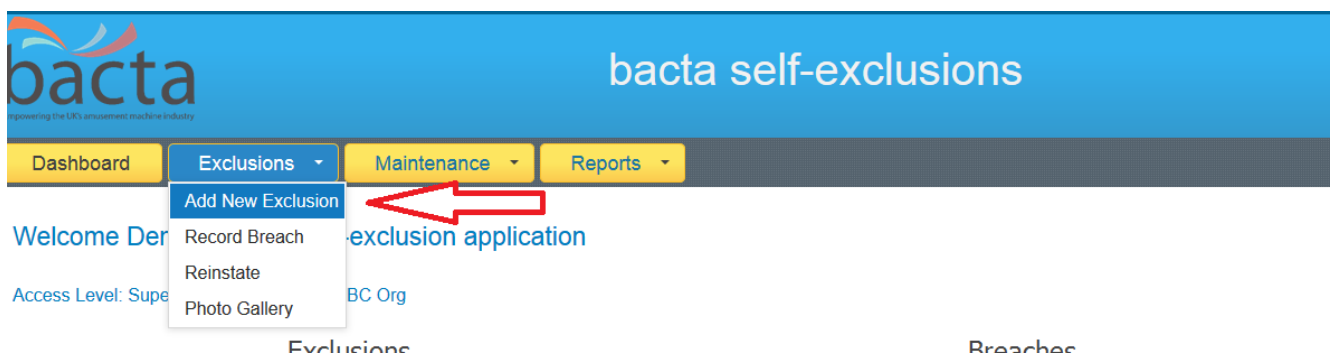
STEP 2: Enter all exclusion details in the form displayed

New Exclusion

Customer Details

Title*:	[dropdown]	Gender: [dropdown]
First Name*:	[field]	Surname*: [field]
Birth Date*:	[dropdown]	Mobile*: [field]
Telephone*:	[field]	Email*: [field]
Car Reg*:	[field]	Other Info*: [field]

Photo

Add/Change Photo

- Passport Style
- Full Face in View
- Head & Shoulders

Customer Address

Postcode*:	[field]	Line 1*: [field]
Line 2:	[field]	Line 3: [field]
Town/City*:	[field]	County: [field]

Exclusion Details

Start Date*: [dropdown]   Period In Months*: [field]

Exclusion Reason*: [dropdown]

Exclude From	Exclude	Plan to Exclude
Bingo	☐	☐
Casino	☐	☐
Betting Shop	☐	☐
Online	☐	☐

Exclusion Zone

Organisation*: ABC Org [dropdown]

Site*: [dropdown]

Radius*: [dropdown]

☰ List   Map

Declaration

ID Check:* ☐ [dropdown]   Email Confirmation*: [dropdown]

T&C*: ☐ I CONFIRM MY SELF-EXCLUSION*: ☐

Signature*:

Redo Signature

START EXCLUSION   Print
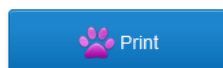
NOTES:
- ➢ When postcode is entered a pop up is shown with all address for that postcode. You can either select an address from the list or enter the address manually.
- ➢ Use the map/list button to see which all sites the user will be excluded from
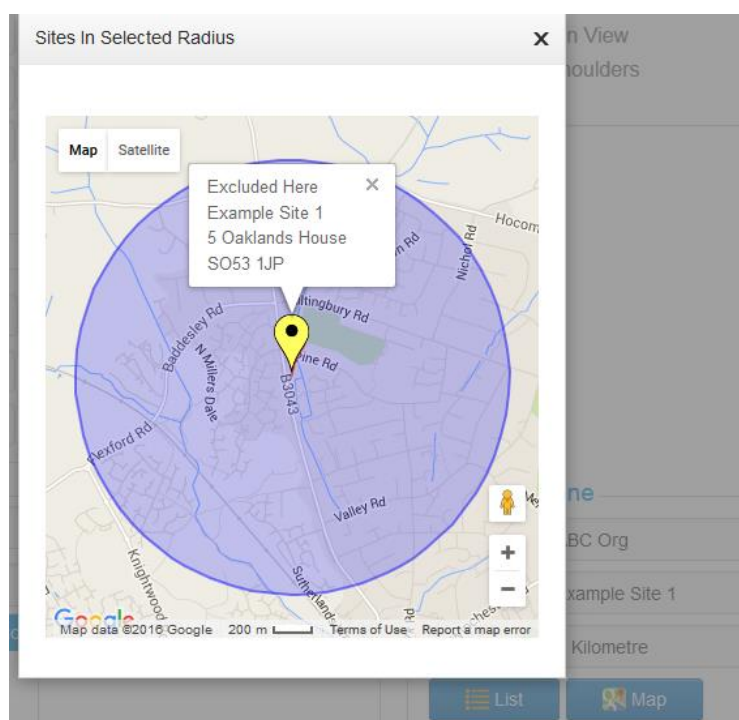
- ➢ To write the signature on a tablet, just click on the signature panel and draw your signature pattern
- ➢ To write the signature on personal computer, move the mouse cursor into the signature panel, right click (do not release the click) and draw a pattern.
- ➢ Use the print button to view a printable form of the exclusion with Terms and Conditions. You can even export the document to PDF/XLS format. Please see reporting section to use these tools

Enter all information and click on Start Exclusion button. On successful save, the browser will display the success message. If not an error message is displayed by highlighting the fields that require correction. You will need to hover on the icon to see the error relating to the field.

8. PHOTO GALLERY

This feature is available only if the user account is enabled to use this feature.
All excluded customer photos for your site can be viewed in this screen

Photo Gallery can be accessed from Exclusions > Photo Gallery
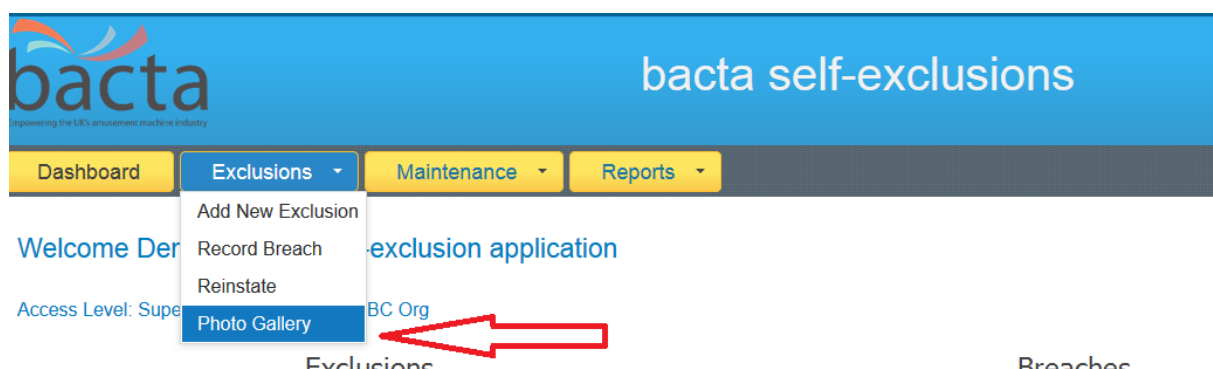
All excluded customer photos at your site will be displayed for 'User access level'. For supervisors, you need to select the site and click on Go button.

You can view more information about the excluded customer by clicking on the name/reference displayed on the photo. A screen will pop up as shown below. You can do further actions to Record Breach / Reinstate / Print all information about the exclusion.

Click on the Close button to view the gallery back.

NOTES:
- ➢ Any new up to 5 days will be shown in green back ground colour in the gallery
- ➢ Any exclusions with breaches will be highlighted with red border in the gallery
- ➢ Any exclusions in the hiatus period will be shown in blue back ground colour in the gallery. Users can then reinstate this customer if they wish to do so.
- ➢ It is possible to sort the gallery items by Most Recent / Location (Nearest first)/ Surname (A – Z)
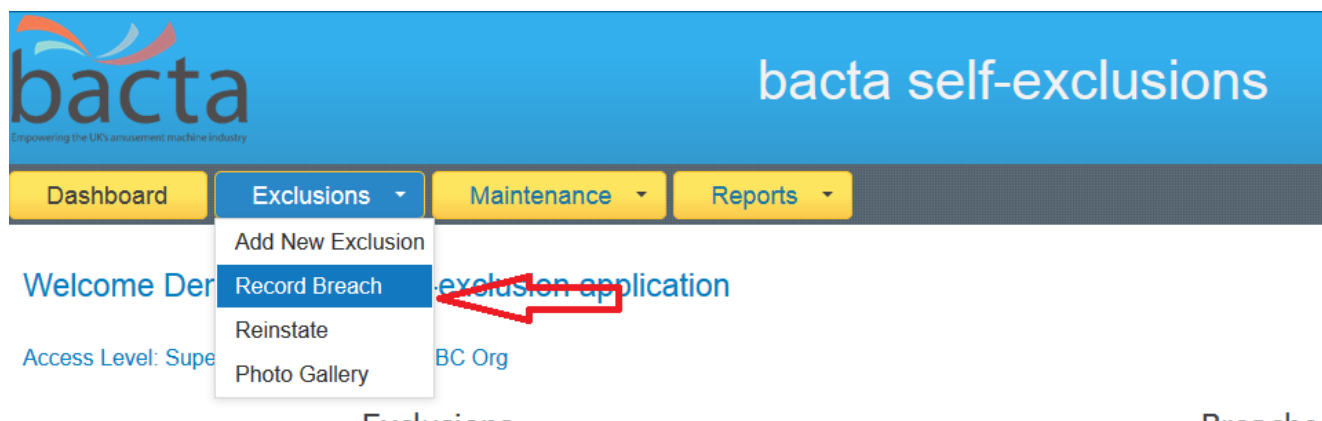- ➢ Detailed information is only available to Supervisors

9. RECORD BREACH

This feature is available only if the user account is enabled to use this feature.

IMPORTANT: A breach can be recorded from the photo gallery as described in the earlier section or from the top menu as described below

STEP 1: Navigate to Exclusions > Record Breach

STEP 2: Search for the exclusion either by using reference number or by details

If the exclusion is in your vicinity, then the exclusion is displayed as above.

STEP 3: Click on the record you wish to record as a breach. Then click on the Record Breach button.

STEP 4: The Application provides you with a form on which to record the breach.

Record Breach

Breach Details

Organisation*:	ABC Org ▼
Site*:	▼
Breach Date*:	▼
Breach Time*:	00:00
Duration*:	00:00
Played*:	▼
Breach Details:	

Ref: 5J2643L6l4
Mr Lion Zoo
Building 1000
Lakeside North Harbour
Western Road
Portsmouth
PO6 3EZ
HAMPSHIRE
07885151910
lion@zoo.com
Exclusion:24/03/2016 - 24/11/2016
Site: Example Site 1, SO53 1JP

[🚶 Record Breach] [Cancel]

Enter the details and click on the Record Breach button. On successful save, the browser will display the success message. If not an error message is displayed by highlighting the fields that require correction. You will need to hover on the icon to see the error relating to the field.

Now when you navigate to the photo gallery you should be able to see a red border on the customer photo as below:

Excluded Customers Photo Gallery

| Organisation: ABC Org ▼ | Site: -- All Sites -- ▼ | Sort Order: Recent ▼ | Go |

Ref: 5J2643L6l4
Mr Lion Zoo

10. REINSTATE EXCLUSION

This feature is available only if the user account is enabled to use this feature.

IMPORTANT: A Reinstatement can be recorded from the photo gallery as described in the Photo Gallery section or from the top menu as described below
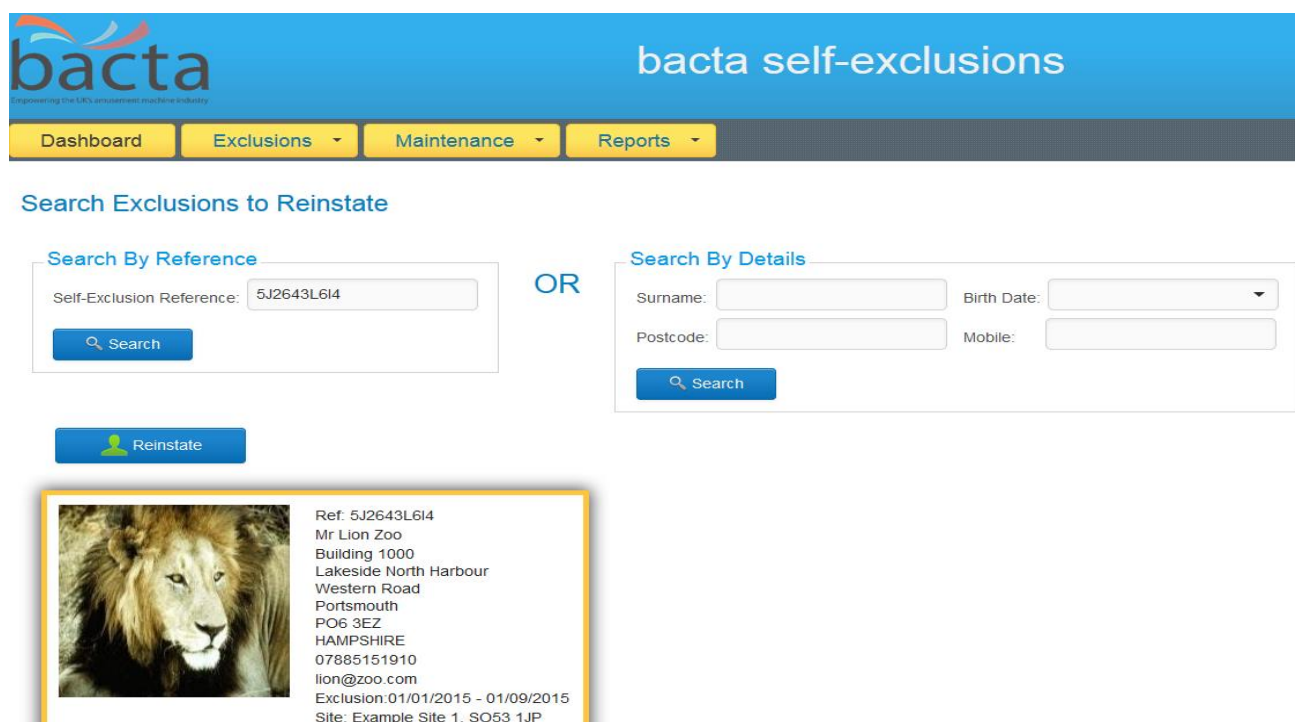
STEP 1: Navigate to Exclusions > Reinstate
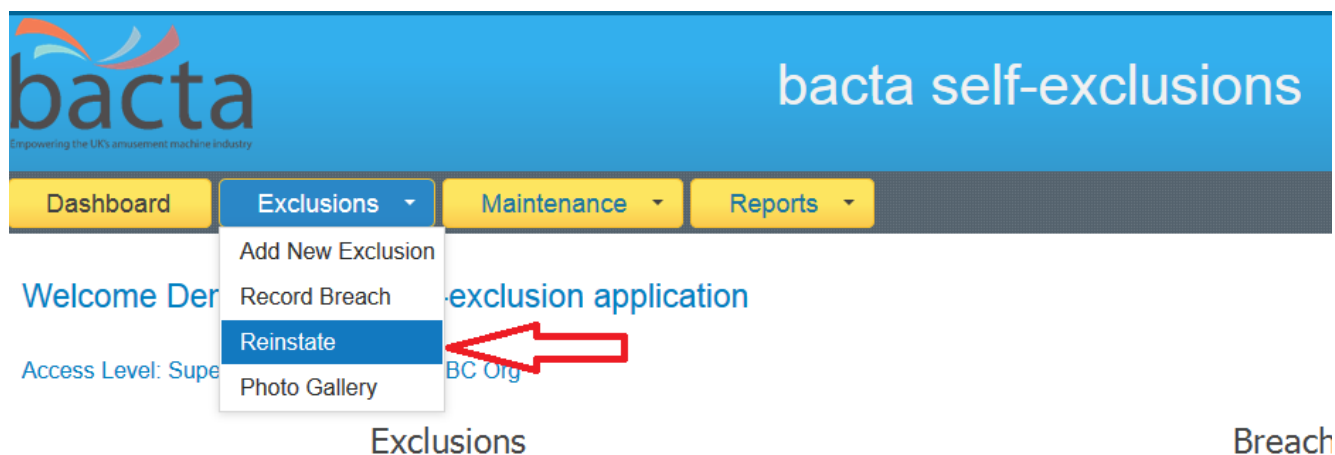
STEP 2: Search for the exclusion either by using the reference number or by details

If the exclusion is in your vicinity and is in the hiatus period, then the exclusion is displayed.

STEP 3: Click on the record you wish to Reinstate. Then click on Reinstate button.

STEP 4: The Application provides you with a form on which to record the reinstatement details.

Reinstate Self-Exclusion

Ref: 5J2643L6I4
Mr Lion Zoo
Building 1000
Lakeside North Harbour
Western Road
Portsmouth
PO6 3EZ
HAMPSHIRE
07885151910
lion@zoo.com
Exclusion:01/01/2015 - 01/09/2015
Site: Example Site 1, SO53 1JP

Reinstatement Details

Organisation*:	ABC Org
Site*:	
Considered Implications of Gambling Again?*	
Understand 24 hour cooling off period?*	
Interview Mode*:	
Interview Date*:	
Reinstatement Date:	
Reason for Reinstatement:	

Interviewed By

First Name*:
Surname*:

Declaration

Receive Email Confirmation?
I CONFIRM MY REINSTATEMENT*
Signature:

Redo Signature

[Reinstate] [Print] [Cancel]

Enter the details and click on the Reinstatement button. On successful save, the browser will display the success message. If not an error message is displayed by highlighting the fields that require correction. You will need to hover on the icon to see the error relating to the field.
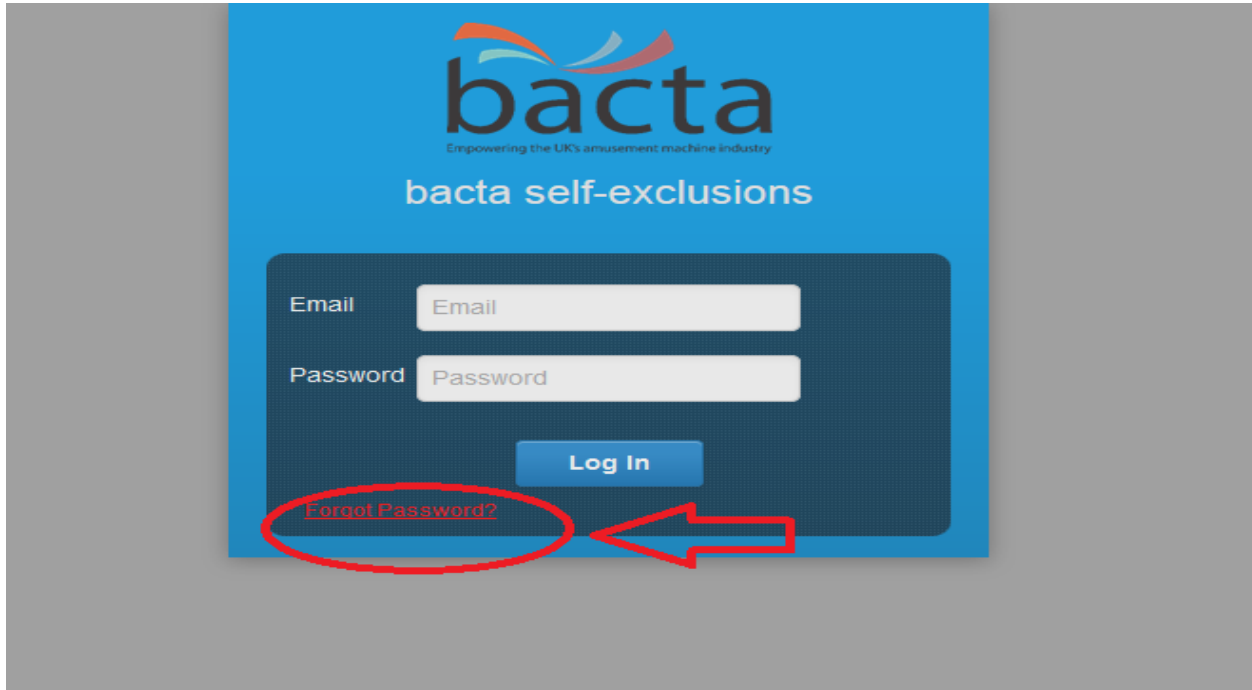
Now when you navigate to photo gallery this exclusion will no longer be displayed

LAST BUT NOT THE LEAST: ALWAYS LOG OUT FROM THE APPLICATION

11. FORGOT PASSWORD

If you forget your password click on the Forgot Password link in the login screen.

Then enter your login email address and your bacta organisation reference number. Click on Email me new password. The new temporary password will be sent to you.

When you login with this new temporary password you will be forced to change your password for the first time.

NOTE: Other than this the user password will expire every 60 days. When you login, you will be forced to change your password

End of document