



# **NATIONAL PARTICIPANT DATABASE & REGISTRATION SYSTEM**

## **STATEMENT OF REQUIREMENTS**

Version 1.0 (January 2020)

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# 1. INTRODUCTION

This document provides the high-level requirements for Wrestling Canada Lutte's ("WCL") National Database and Registration System ("System").

## 1.1. Objective

The objective of the document is to provide specification of a System such that potential system developers and suppliers are able to understand the needs of various WCL stakeholders (national, provincial/territorial, club, other) to a level where they are able to provide system solutions that meet these needs.

## 1.2. System Parts

WCL sees the System as a composite of two major parts: a national participant database and an event registration system.

These components must all be integrated to avoid pitfalls and labour involved in deploying, using and maintaining an unintegrated system. The various users expect that any new system be seamless in look and feel and facilitate operations rather than impede progress.

The system delivers these core purposes in the following order:

- 1) Participant Tracking
- 2) Event Registration

## 1.3. Current Implementation Components

In 2019, WCL used "Trackie" ([www.trackie.com](http://www.trackie.com)) for event registration. Some Provincial / Territorial Sport Organizations ("PTSOs") also used "Trackie" for their provincial membership registration needs. WCL does not currently have an integrated national participant database.

## 1.4. Expectations

### Technology

The expectation is that the system will have a projected 10- to 15-year lifespan. Technology changes and the future is unpredictable, but the underlying system components must be designed to migrate near seamlessly as technology progress without forcing a major redesign.

The system needs have a modern, secure web-based interface. This requirement means responsive designed webpages generated by HTML5 output, using CSS for formatting, and HTTPS access.

A secure authentication and authorization system is required for all parts of the system.

All technologies (languages, CMSs, dBMS) must be proven solutions at their current versions and be supported by the provider. Orphaned, deprecated, or pre-release technology will not be used in implementing any part of the production system. Solutions proposing closed, proprietary technology that is not generally commercially available will not be considered.

### Retention and Privacy

The system must comply with current Canadian data retention and privacy laws, both at the national and provincial level. Data must not be stored or transmitted outside of Canada at any part of the project (development or operations) at any time for any reason. Such violations will not be accepted.

### Timeline

WCL recognizes that the development of the System is a major undertaking. WCL understands that multiple phases of development may be necessary to implement all the needs of the various stakeholders.

WCL expects that the primary core purpose – national participant tracking & event registration – will be met by the initial version of the system and other features may require future stages of development.

### Limitations

WCL has attempted to describe the ideal 'final form' of the System. However, there may be inconsistencies and oversights as WCL's primary focus has always been on the sport and not technology. WCL will address any issues found in the requirements in a timely manner.

## 2. OVERVIEW

Wrestling in Canada is composed of one unique national sport organization (NSO), i.e. Wrestling Canada Lutte (WCL) and its membership, composed of thirteen provincial / territorial wrestling associations (PTSOs), as well as broad membership representation in four major tiers – athletes, coaches, varsity coaches, and officials (referees). Additional participation groups include staff and supporters (medical, team leaders, delegates, volunteers, directors, etc.). There are over 10,000 participants in wrestling in Canada.

Athlete and coach participation is largely based on an intricate club network that is not mutually exclusive (for example, participants can simultaneously be members of a varsity club and non-varsity club):

- Within PTSOs (grass roots, development & high performance)
- Within U SPORTS (varsity league)
- Within secondary schools (school league)

Officials participation is based on (not mutually exclusive):

- Within CAWO (Canadian Association of Wrestling Officials)
- Within PTSOs

The main objective is to develop a national participant database and central registration system so WCL can more accurately keep track of the number and status of its participants and register participants for all WCL, PTSO and CAWO sanctioned events.

The new system should also meet the registration needs of WCL's participants, ideally helping track all wrestling participation across the country and providing one location for participant interaction, for annual registration, event registration and membership communication.

### 2.1. Participants

Athlete, coach and official participants are generally members of the PTSO of their residence. PTSO members (athletes and coaches) may be members of a club or they can be unattached (independent). Officials are generally members of a provincial officials' association (where applicable).

PTSO membership fees vary according to the participant's role. PTSOs pay an affiliation fee to the NSO, which is representative of participation at Canadian Championships and / or international participation on an annual basis. WCL will be reviewing the business model (i.e. participant fee structure) in conjunction with the development of the System. It is anticipated that future participant fees will replace the current affiliation fee structure and will vary according to the participant's role and could include a WCL fee component, a PTSO fee component, and a club fee component, that will vary on the club and PTSO. WCL will work with the Vendor to ensure this makes sense.

Officials are also members of CAWO. As a representative group, CAWO pays an affiliation fee to the NSO.

Individuals cannot be members of multiple PTSOs, but can be associated with multiple clubs (eg. club, varsity, secondary school). WCL requires a 'primary club' designation that allows registration in multiple clubs, but indicates the one club the participant will compete for at NSO sanctioned events. The primary club designation may also be indicative for billing purposes.

Individuals can participate in multiple tiers concurrently, (eg. coach & official, athlete & coach, athlete & official, etc.).

Supporters (medical, team leaders, delegates, volunteers, directors, etc.) may be affiliated with clubs and / or PTSOs, but membership in a PTSO is not required.

WCL's membership agreed to use a January 1<sup>st</sup> to December 31<sup>st</sup> registration term for the System.

## **2.2. Events**

There are a number of different events in the Canadian wrestling environment. Competitions / tournaments are a major category. A wrestling competition event, which typically has an event organizer, is generally organized over a fixed time (generally a weekend or a 3- to 4-day event).

Beyond competitions, there are training camps, clinics, meetings, webinars, etc. An event consists of various people in one or more roles depending on the nature of the event. Event sizes range from two people to hundreds of people. Durations vary – a short meeting can take 30 minutes and an extended training camp can last longer than a week.

Depending on the level of competition, events can be organized by WCL, a PTSO, or CAWO.

For the purpose of the System, an Event is an activity or service with a start and end date for which registration is required.

### 3. OBJECTIVES

The System is intended to meet the following core objectives:

- Ensure a quality user experience in any interaction with the System.
- As the System must be accessible to all Canadians, it must support both official languages.
- Allow participants to register with WCL, and then with their PTSO, CAWO, and their club(s).
- Allow WCL, PTSOs, CAWO, and clubs to maintain up-to-date information on participants so they are able to provide both quality and efficient services in both defining and delivering their events and make accurate reports for insurance providers and funding partners, and for other critical operational needs.
- Allow individuals to register for events offered by WCL, a PTSO, or CAWO.
- Facilitate Payment for participant registration and event registration, with the amount being deposited directly to the appropriate body's (club, PTSO, CAWO, WCL) account, either within the System as credit or outside as a financial transaction and, if appropriate, distributed between these bodies seamlessly.
- Importing of participant data from Trackie or other PTSO and club management systems. This transfer of data is planned to be a one-time manual process before the System goes into open operations, so a web interface is not necessary. The expectation is that the dBMS tools can be used for this process. WCL will provide sample data for development purposes of the import and for system testing.

Note that while it is primarily intended that the System will provide the capability for WCL, PTSOs and CAWO to offer registration services, WCL wishes to be able to also offer this capability to clubs. Such associations would only have visibility into their own participants and their own events, and they should be able to set fees and accept payment for their events/services and communicate/collaborate with members/registrants.

WCL will define how it will measure these objectives with the selected vendor, which will then be used in the design, development, testing and validation of the system. Each objective may have multiple requirements; and each requirement may have multiple tests to validate when the requirement is met. The process should provide traceability through the whole process, helping ensure a quality system is delivered.

## 4. INFORMATION MODEL

This section is intended to provide a definition of the entities and the relationships amongst the entities that must be supported by the System.

### 4.1. Membership

A participant is a member at a prescribed membership category if they pay the membership fee in accordance with the policies of WCL, CAWO, a PTSO, and/or a club and agree to terms of membership. Membership categories and fees will be defined distinctly at the WCL, CAWO, PTSO, and club levels, based on the alignment required.

Importantly, not all membership categories require paid fees and not all participants are necessarily 'members' of an organization, per the organization's bylaws, but are defined as members in this document for ease of use.

Most events require individuals to be registered as a member before they are permitted to register for that event. If an event requires a specific membership category as a pre-requisite, then the member must hold that designation for the year in when the event occurs.

Membership provides specific services over a 12-month period (currently defined as January 1<sup>st</sup> through December 31<sup>st</sup>). A participant should be able to purchase membership for a future year while being a member for the current membership year.

### 4.2. Organizations

#### National Sport Organization (NSO) – Wrestling Canada Lutte

The association with the unique mandate as the sport governing body for wrestling in Canada. WCL will typically have one or more administrators who have authority to administer the System on behalf of WCL. The WCL Administrator(s) shall be able to edit information relating to WCL events and shall be able to view and edit information on all participants that have registered with WCL or registered as participants in their events. Certain types of WCL administrators may be restricted to a subset of capabilities.

#### Provincial / Territorial Sport Organization (PTSO)

The association with the unique mandate as the sport governing body for WCL in their province or territory. The PTSO will typically have one or more PTSO administrators who have authority to administer the system on behalf of the PTSO. A PTSO Administrator shall have visibility into all events, individuals, clubs, etc. within their PTSO. The PTSO Administrator shall be able to edit information relating to their PTSO events and shall be able to view and edit information on participants and Clubs that have registered with the PTSO or registered as participants in their events. The PTSO controls access to the system by the Clubs. Certain types of PTSO administrators may be restricted to a subset of capabilities.

## Club

Means any organized group of persons associated for the purpose of wrestling and registered through their PTSO for that purpose. A Club will typically have one or more Club Contacts that serves as the points of contact for the Club. It also has a mailing address, phone, email address, region and optionally a website. PTSOs act as the agent in determining what Clubs are able to affiliate with the PTSO and WCL.

## Canadian Association of Wrestling Officials

The association with the unique mandate as the affiliate body to WCL for wrestling officials in Canada. CAWO will typically have one or more administrators who have authority to administer the system on behalf of CAWO. The CAWO Administrator(s) shall be able to edit information relating to CAWO events and shall be able to view and edit information on participants that have registered with CAWO or registered as participants in their events. Certain types of CAWO administrators may be restricted to a subset of capabilities.

### **4.3. Individual Participant Roles**

Individuals may participate in wrestling and wrestling events in a variety of roles, including:

- Athlete
- Coach
- Official (Referee)
- Staff
- Supporter:
  - Team Leader / Manager
  - Medical Staff
  - Event Organizer
  - Volunteer
  - WCL / PTSO / Club Volunteer (this category is for individuals typically serving as Executive, Board, Committee or volunteer members for the respective association)
  - Alumni member

### **4.4. Sport Disciplines**

Participants may register in one or more of the two disciplines and may fill more than one of the above roles. Wrestling disciplines sanctioned by WCL include:

- Women's Freestyle (WW)
- Men's Freestyle (FS)
- Women's Greco-Roman (WWGR)
- Men's Greco-Roman (GR)

#### 4.5. Participant Profiles

Primarily, the participant profile should indicate with which organization(s) the individual is registered and in which role(s). Collected information should include, but not limited to:

- First Name (required)
- Last Name (required)
- Date of Birth (required)
- Gender Identity (required)
- Address, City, Province, Postal Code (required)
- Email address (required)
  - Consent to allow email communications from each level of the organization (eg. a member may want club emails, but not WCL emails). Checkboxes must comply with Canadian anti-spam legislation
- Phone number (required)
  - Consent to allow communications from each level of the organization. Checkboxes must comply with Canadian anti-spam legislation
- Emergency contact information (required)
  - Parent / guardian information when the participant is under the age of consent
- PTSO (required):
  - Primary club (required)
  - Other club(s) (if applicable)
  - Participant role(s) in each club (required)
- CAWO (if applicable)
- Aboriginal status (checkbox)
- Safe Sport Results:
  - History of criminal record checks and vulnerable sector check
    - Date of latest E-PIC and result
    - Date of Vulnerable Sector Check and result
  - History of Respect Program Training
  - History of Make Ethical Decisions Training
  - History of Making Headway Training (where applicable)
- NCCP certification number (if applicable)
- Officiating certification information, including
  - Status and certification level in CAWO / WCL
  - Status and certification level in UWW (if applicable)
- Status of good-standing at each level of the organization (required)
- History of any disciplinary action
  - Description
  - Date range of any sanctions
- Additional comments for each level of the organization, so that notes for the individual can be kept. While comments should be visible to all, only administrators should be able to add/edit/delete them and the author should be indicated with a date/time stamp.
- Administrative roles should also be tracked in a participant's profile.
- The System should have a numeric field for the WCL number, which is a unique identifier assigned to each participant.

Not every profile will contain all the data described above, and users and administrators will not be required to submit any data other than in the fields designated as 'required'. However, the System should have the capacity to store the information if entered.

The System should support the ability to store documents associated with personal profiles, including photos, passports, scanned forms, and other documents. Every file uploaded should have a description field explaining the contents, avoiding having to interpret potentially cryptic file names. Tools may be required in the software to ensure documents can be resampled/resized to avoid storage bloat. As well, some rudimentary document management (CRUD) are needed for files in the system.

The System must be able to generate a validation report.

Participant profiles should be unique regardless of what roles that individual may assume. For example, an individual who is an athlete, official and/or coach should have one record that indicates the multiple roles he/she may assume. Similarly, if an athlete is registered in both Freestyle and Greco-Roman disciplines then there should only be one member profile for that individual.

While the System stores all this information, it will only display a limited amount of personal data to determine a potential conflict between an existing record and a new record being entered.

The system should allow future additional fields in the underlying database, as data requirements may change over the lifespan of the system. The existing web interfaces should continue to work without modification with a newer database record structure (i.e., be backward compatible, with the understanding that the interface will change to display/edit the new information at a later time).

#### Safe Sport Status

Background checks usually require an Enhanced Police Information Check (E-PIC) and Vulnerable Sector Check (VSC). Users must be able to log into their accounts and edit participant profile information to indicate the date of the checks. They should also be able to attach a scan of their report. The System must be able to send a message to the user and administrator(s) when their respective status is required to be renewed (where the triggering condition is configurable by the administrator).

Same check status requirements would apply for Respect Program training and other required Safe Sport training.

#### **4.6. Account**

This is the information relating to registrations, invoices, payments and receipts for one or more participants. Accounts may be individual accounts or family accounts. For individual accounts there may be only one participant associated with the account. For family accounts there may be multiple participants with at least one individual designated as the Parent/Guardian. The Parent/Guardian typically must take responsibility for both legal and payment obligations for the dependant participants. Accounts may be accessed by one individual only through secured access. A participant may be associated with both an individual and family account, however, the participant record should remain unique (ie. there should not be duplicate participant records in this case).

#### **4.7. Events**

For the purpose of the System, an Event is an activity or service with a start and end date for which registration is required. An Event will have an Event Organizer who is the point of contact for the Event. An Event is uniquely owned by one association – WCL, PTSO, Club, or other.

Competition – a wrestling competition event that is typically organized for athletes over a day (or days). A competition will typically have a Tournament Chair designated as a point of contact.

Training camp, clinic, meeting, symposium, webinar, conference – examples of other types of events for which individuals may wish to register.

## 5. ADMINISTRATION

The System shall accommodate three tiers of organizations that can manage events and registrations on the System, plus event organizers who can only manage events (and not registrations):

1. WCL
2. PTSO + CAWO
3. Clubs

The WCL administrator controls access to the system by PTSO + CAWO administrators. A WCL Administrator shall be able to view and edit information on all Participants, PTSOs, CAWO and clubs that have registered on the System. The WCL administrator shall be able to view and edit information relating to WCL events, however, can only view information relating to events owned by PSO and Clubs.

A PTSO Administrator controls access to the system by Club administrators. A PTSO Administrator shall be able to view and edit information relating to all participants and affiliated clubs who register within their organization and for their Events. They should have no access or ability to view participants registered with other PTSOs. However, they would be able to view information on Events that are organized by WCL, other PTSOs, CAWO, clubs, and event organizers.

A CAWO Administrator shall be able to view and edit information relating to all participants who register within their organization and for their Events. They should have no access or ability to view other registered participants. However, they would be able to view information on Events that are organized by WCL, other PTSOs, clubs, and event organizers.

A Club Administrator can view and edit information relating to all participants who register within their organization and for their events. However, they would be able to view information on Events that are organized by WCL, other PTSOs, and event organizers.

### 5.1. WCL Administration

The System should support a WCL administrator role.

#### Manage WCL Information

The WCL administrator shall be able to manage the following information relating to WCL:

- Configuration of PTSO, CAWO and clubs
- Configuration of WCL Events
- Configuration of participant categories, membership start/end dates and associated fees for membership with WCL, CAWO, PTSO and club (or configure that there is no participant fee at the various levels)
- Configuration of competitive categories, including the creation of age and weight categories, competition types, etc.
- Configuration of tax information applying to WCL registration fees

- Creation and editing of general ledger account names for use with financial transactions

### **Manage Participant Information**

The WCL administrator shall be able to manage the following information for members:

- Add and edit participants and their associated information (where members can include participants of CAWO, PTSOs, clubs, and individuals)
- Add and edit accounts and their associated information
- Transfer members between PTSOs

### **5.2. PTSO Administration**

The System should support a PTSO administrator role.

### **Manage PTSO Information**

The PTSO administrator should be able to manage the following information relating to the PTSO:

- Configuration of PTSO information
- Configuration of PTSO events
- Configuration of PTSO membership categories and associated fees for membership at the PTSO level (or configure that there is no participant fee at the PTSO level)
- Configuration of competitive categories, including the creation of age and weight categories, competition types, etc.
- Configuration of tax information applying to PTSO registration fees
- Creation and editing of general ledger account names for use with financial transactions

### **Manage Participant Information**

The PTSO administrator shall be able to manage the following information relating to all members in their PTSO:

- Add and edit members and their associated information (where members can include clubs, and individuals)
- Add and edit Accounts and their associated information
- Transfer members between clubs within the PTSO

### **5.3. CAWO Administration**

The CAWO administrator should be able to manage the following information relating to CAWO:

- Configuration of CAWO information
- Configuration of CAWO Events

- Configuration of CAWO membership categories and associated fees for membership (or configure that there is no participant fee at a certain level)
- Configuration of tax information applying to CAWO registration fees
- Creation and editing of general ledger account names for use with financial transactions

#### **Manage Participant Information**

The CAWO administrator shall be able to manage the following information relating to all members in CAWO:

- Add and edit members and their associated information (where members can include clubs, and individuals)
- Add and edit Accounts and their associated information

#### **5.4. Club Administration**

The System shall support a club administrator role.

#### **Manage Club Information**

The club administrator shall be able to manage the following information relating to the club:

- Configuration of club information
- Configuration of club membership categories and associated fees for membership at the club level (or configure that there is no participant fee at the club level)
- Configuration of tax information applying to club registration fees
- Creation and editing of general ledger account names for use with financial transactions

#### **Manage Participant Information**

The club administrator shall be able to manage the following information relating to all members in their club:

- Add and edit members and their associated information
- Add and edit accounts and their associated information

#### **5.5. Event Organizer**

The System shall support an Event Organizer role.

#### **Manage Event Information**

- Configuration of event organizer's events

## **5.6. Search Functions**

The WCL Administrator, CAWO, PTSO or Club shall be able to search for Participants, Accounts, and Clubs by a variety of search criteria (based on their members).

Participants can be searched for by (at least) the following criteria:

- First and/or last name
- Member ID / Licence number (to be configured)
- Email address
- PTSO
- Club
- Membership category and season
- Age
- Gender

Upon receipt of the search results Participant information can then be selected for viewing or editing.

For all search criteria the system should also allow partial specification of the field value, for example, first name starts with, first name contains, last name starts with, last name contains, account name contains, email contains, city contains, home phone contains, postal contains, address contains, etc.

Upon receipt of the list of entities matching any of the above search criteria (for Participants, Accounts, or Clubs) the system shall also be able to print the search result list or download the list into a file (at least in CSV, XLS and semi-colon delimited).

## **5.7. Account Passwords**

Due to the sensitive nature of data, 2-factor authentication is required. The system shall provide the ability for users and account holders to manage their passwords.

## **5.8. Deleting Members**

Members are often registered with multiple organizations at the time of registration. For example, a member who registers with a club will often also be registered with a PTSO. For this reason, only the WCL administrator should have the ability to completely remove a member from the System. CAWO, PTSO and Club administrators may mark a member for deletion on a conditional basis, but the WCL administrator must have final removal authority.

## **5.9. Manage Events**

Each level of administrator should be able to view all events in the System including WCL events, CAWO events, PTSO events, event organizer events, and club events. However, each level of administrator should only be able to edit their own events.

Each Administrator shall be able to create and manage the following information for Events in the System:

- Event type (eg. competition, meeting, camp, clinic, webinar, etc.)
- Competition categories (if the event has categories)
- Event name
- Event description
- Event website (if any)
- Location
- Venue
- Event contact person (including contact email and phone number)
- Start and end date
- Participant pre-requisites (if any)
- Performance pre-requisites (if any)
- Age class(es) – ability to limit registration to a specific age class(es)
- Weight class
- Start and end date for registration, including early-bird and late periods
- Registration fee (and associated taxability requirements)
- Payment method options to be offered
- Event may be optionally designated as sanctioned or unsanctioned
- Specification of terms, conditions, waiver of liability, personal information usage, etc.
- Ability to attach files associated with the event (eg. map, poster, etc.), or include links
- Ability to create customizable fields for events where information can be gathered on participants (eg. walk-out song, t-shirt size, etc.)

In the case of Competition events, it is periodically the case that registration for these events occurs with a 3<sup>rd</sup> party Event Organizer who may have a distinct Competition Management System.

Administrators shall be able to view and edit the list of registrants for any of their events. S/he may also remove participants from the registration list. Administrators may authorize and process full or partial refunds to a registered participant who has previously paid the event fee.

Event Contacts may or may not be the same individual as an administrator. Event contacts should have the capability to add/delete events, register/deregister/monitor participation, enter results, and have additional capabilities described in the applicable sections of this document.

#### **5.9.1. Copy / Save Events**

As administrators must frequently create events that are very common to existing or previous events, the system shall support the capability to reduce recurring data entry by allowing the administrator to duplicate existing or previous events, edit it, and save it as an instance of a new event. Similarly, the system may support the capability to save templates of event information for re-use.

### **5.9.2. User-Defined Fields (Events)**

The system shall support the capability for having user-defined fields that can be defined by administrators when they create an event. For example, administrators should be able to define the text field prompt for a field value and allow either a free format text field response or an enumerated field response. The system should support at least five (5) user-defined fields for each event.

### **5.9.3. Event Eligibility**

The system should provide checking of eligibility rules for events, when applicable, such as:

- Registrant age constraints
- Registrant gender constraints
- Previous performance standards
- Registrant role(s)
- Pre-requisite qualifications or licenses (coaching or officiating certification level)
- Safe Sport Check status (eg. criminal record check, Respect training, etc.)

Registrants should be NOT able to register for, or be registered for, an event for which they are not eligible.

### **5.9.4. Event Change Notification**

The system should notify registered individuals via email of any significant changes to an event such as dates, contacts, requirements, etc.

## **5.10. Communication**

Administrators should be able to use various selection criteria to be able to create a list of participants to whom they may then communicate with. WCL would consider exploring an email integration tool that is separate from the System.

## **5.11. Disciplinary Action**

Administrators should be able to edit a member's record to indicate any disciplinary actions that may have been imposed by the organization. The system should allow a description of any such actions and the date such actions were imposed. Further, if such actions impose constraints on the member's ability to register or participate in any events this must be noted and the start and end dates for the imposition of such constraints should be noted. The system should raise an alert to the appropriate administrator if a disciplined individual attempts to register for an event.

## **5.12. Coordinators and Registrars**

Administrators should have the capability to create accounts for individuals who take on specific roles in the organization.

An administrator should be able to create or modify an account that corresponds to a specific user role, and should be able to specify which functions that user shall be able to perform from within that account. For example, an event contact at a club should only be able to manage and edit the club's events – not edit member information.

## **5.13. Administrative Reporting**

### **5.13.1. Standard Reports**

WCL expects to work with the selected vendor to determine which reports can be created from the collected member information and event information. Eventually, the System should be able to produce the following standard reports, with full filtering capabilities:

- Validation file (first name, last name, club, province)
- Event Reports (event registrants, outstanding payables for event, etc.)
- Audit log
- Club List
- Membership Reports by category/year/PTSO/club, including other membership filters
- Account Report

### **5.13.2. Accounting Reports**

The System shall, at a minimum, provide the following standard reports to support accounting requirements:

- Account Reconciliation Report (over date/time range)
- Invoice Reports
- Accounts Receivable Report (over date range)
- Transaction Report (over date range)
- Refund Report

The system shall be able to export accounting reports into a format that can be uploaded by accounting software such as Quickbooks, Simply, Accpac, etc.

### **5.13.3. Executive Reporting**

The System shall provide reporting and information query functions that will support executive needs at WCL and PTSOs for business intelligence on participants and event registrants. This would include the ability to know numbers of participants at various levels and types of servicing as well as demographic information. Executive functions should be able to report on trends in growth and areas of demand in their offerings. The system should be able to report on retention rates for members from year to year.

#### **5.13.4. Information Exporting**

The System should, for each standard report, also be able to export the data selected into a file in standard formats (such as CSV).

## 6. EVENT REGISTRATION

One of the primary objectives of the System is to provide users with an easy method of registering with WCL, CAWO, the PTSO, or club, and for registering for an Event. The System must provide a user interface consistent with modern best-practices for providing an easy and attractive view of the offerings and provide an easy and intuitive means to achieve registration and payment.

The user interface should be available and designed for ease of use on PCs, Apple products, mobile devices, and for use with various internet browsers.

### 6.1. Events

Anyone should be able to view available events on the System. If a user navigates to the System they should be able to view all events however they should also be able to select the view of WCL, CAWO, PTSO, Club. In the case where the user is directed to the System from WCL, CAWO, PTSO, Club site they should get the default view defined by that association.

The user should be able to filter their view of events by either specifying selection filters (for example, by event type, date range, location, competitive category, organization etc.) or by entering a search phrase.

The event viewer should provide the viewer with registration information and other details about the Event.

The user shall be able to select to register for an event shown. In this case, the user should be able to either log in to an account or create a new account.

#### 6.1.1. Listing an Event

An administrator (or someone designated this specific function by an administrator) should be able to submit information about an Event for the purpose of informing the sanctioning organization (e.g., WCL, CAWO, PTSO, club) about their intent to offer an event. Some types of Events may require approval to be listed and others may not. If approval is required, the administrator of the governing organization would review the submission and determine whether the event can be listed.

#### 6.1.2. View Event List

Users should be able to view all upcoming or past events on an event viewer. A user should be able to filter the list of events by the following criteria:

- Type of event (e.g., competition, meeting, conference, clinic, etc.)
- PTSO or CAWO
- Club
- Location
- Month
- Year

- Competition Type (local, championship, varsity, etc.)
- Upcoming or past events

### **6.1.3. Event Registration**

Individual event registration is frequently required for competitions, camps, clinics, courses, symposiums, meetings, etc. In some cases, the registrant must possess the correct membership category to be able to register for these types of events. Additionally, an individual may wish to simply register for membership in a specific category.

Assuming the user has created or is logged into their Account and has selected to register for an event, the system will use information from the account to fill in required information for the registration. It will prompt the user for any further required information and then check the eligibility rules for registration in the event. In the case that the member is eligible and there is space in the Event, then the member will proceed to Payment Processing.

If the member does not meet the eligibility requirements for the event, then they will be prompted with a message that explains the reason.

Many events will require the member to be of a prescribed membership Category before being able to register for an event. In this case the member does not have such a membership then the system will prompt the user that they need to purchase the membership, and it will add that item and its incremental cost to the Invoice and request confirmation from the user to proceed.

Once the necessary registration information is fully provided then the registrant will confirm that they wish to register and proceed to payment processing. An Invoice will be created indicating the items that are being purchased within the registration.

In the case where the event is full and the event allows wait-listing, the system should prompt the user to determine if they wish to be put on the waitlist.

If the participant is successfully registered for an event then the system shall send a confirmation email to the Participant along with their receipt/invoice. If they are unconfirmed for the event but placed on a wait list then they should also get a message indicating this.

When multiple members are being registered for an Event by a coach or club administrator, the system should check whether the members are eligible.

If the member is successfully registered for an event then the system shall send a confirmation email to the member along with their receipt / invoice.

## **6.2. Accounts**

### **6.2.1. Account Creation**

When creating an account, users should be able designate if they wish to establish an individual account or family account. For individual accounts, there may be only one member associated with the account who is also the account holder. For family accounts, there may be multiple members with the account holder designated as a parent/guardian. The parent/guardian typically must take responsibility for both legal and payment obligations for underage members. Note that the definition of minors and dependants by age are set by provincial law - 19 in BC, 18 in others.

The user must designate a username and password as well as personal contact information such as address, phone number and email address. The system shall ensure usernames are unique and passwords are sufficiently secure.

For family accounts the user may add or delete members for whom they will agree to undertake legal (for example, for Waiver of Liability (for adults), Informed Consent (for minors), Personal Information Disclosure, Code of Conduct, Communications Opt-In/Out, etc.) and payment responsibilities.

The account shall maintain information relating to registrations, invoices, payments and receipts for the designated members. The account will also maintain personal information for each member in the account.

### **6.2.2. Maintain Account**

At any time, the user may log into their account and be able to edit their personal information, payment information, or change their password. Users should not be able to change their first name, last name or date of birth. For family accounts the account holder may add, edit or request to remove members within the family from the account, such as when a minor becomes an adult. (NOTE: deletion must never remove a participant information. It only removes the link to the account).

Administrators will process removal requests. Note that no one but an administrator can delete a member record.

In addition, a profile in an individual account should be transferable to a family account by the individual. Once part of a family account, only the account manager or administrator can separate the member back to an individual. In some cases, a family goes through a change where the family account holder is no longer legally responsible (divorce, orphan, adoption). Also, some members may be forever under guardianship, such as adult dependents.

The system shall support typical functions for username and password retrieval.

In the event a member wishes to change their name or date of birth they must contact the WCL Administrator.

### **6.2.3. Controls to Minimize Duplicate Members**

The system should provide capabilities that can minimize the potential for duplicate records for the same member. For example, if a user creates a new member, the system may check its database for existing members and determine if there is an existing member record that is identical or similar to the newly created one. In this case the system may prompt the user for reconciliation of the information or send a message to the administrator that a newly created record is similar to an existing one. The administrator may then attempt to reconcile the potential duplicates.

This feature is particularly important for PTSOs or clubs who register their members in the System in bulk.

## **6.3. CAWO, PTSO and Club Registration**

CAWO and PTSOs will be required to renew their membership annually with WCL. Similarly, clubs may be required to renew their membership with PTSOs, as applicable.

The System should permit the organizations to register their membership with their governing organization via an application form, the submission of required documents, and the payment of any membership dues. The System should permit the respective administrator (e.g., WCL administrator or PTSO administrator) to approve or deny membership to the applicant organization and/or indicate if more submissions are required.

### **6.3.1 Register Club for Affiliation**

At the outset of a season a Club may have to apply for affiliation with a PTSO. An individual shall be able to apply to register a Club for affiliation. In providing such an application, they would need to specify the Club name, address, and contact information plus designate a Club Contact.

When a Club is registered for affiliation, the PTSO may need to verify that the Club meets any PTSO conditions before the Club is approved for the season. The PTSO may require certain information be provided and certain conditions be met before a Club is accepted for affiliation. The system shall be able to describe the required information that must be provided by the Club Contact and the system shall allow the Club Contact to provide information through fields on the registration form or through the provision of attachments to be provided to the PTSO. Once the PTSO is satisfied that a Club meets all the requirements for affiliation, the PTSO Admin can select that a Club be affiliated and send an email message to the Club Contact to indicate that they have been accepted for affiliation.

### **6.3.2 Club Registration Portal**

Once a Club is affiliated or renewed for affiliation they will be provided a link to their Club Registration Portal in the System. The Club will designate an individual to be the Club Administrator and provide them with an initial Account.

The System Club Registration Portal will function similarly to the WCL and PSO Registration Systems in that the Administrator can set up event or membership registrations, post those on their Club Event Viewer, accept and manage registrations, and accept payment for those registrations.

Clubs can use the System Club Registration Portal to register members for their Club Membership. The System Club Registration Portal should also be able to offer PSO/WCL membership together with Club Membership as a common registration transaction.

### **6.3.3. Certificate of Insurance**

Registration with WCL and/or a PTSO may qualify the registrant for certain types of insurance coverage provided by WCL or a PTSO.

An administrator may be able to provide a Certificate of Insurance for a PTSO or a club provided the organization has satisfied any registration requirements set out by WCL, a PTSO, and/or an insurer.

## **6.4. Member Registration**

WCL, CAWO, PTSOs, and clubs should be able to register their individual members on the System. The system should support registration as follows:

1. Using a Registration Portal as part of the System.
2. Bulk offline upload of a file produced (in CSV format) from a third-party registration system, or a spreadsheet application.

### **6.4.1. Registration Portal**

Once CAWO, a PTSO or club is affiliated or renewed for affiliation they will be provided a link to a Registration Portal in the System. The organization will designate at least one individual to be an administrator and provide them with an account.

The Registration Portal will permit the administrator to set up event or membership registrations, post events on the Event Viewer, accept and manage registrations, and accept payment for those registrations.

WCL, CAWO, PTSOs, and clubs can use the Registration Portal to register members. As applicable, registration with one organization (such as a club) should be accompanied by registration with a governing organization (such as a PTSO) along with all applicable applications, consents, and registration fees.

### **6.4.2. Bulk Upload of Members**

In the case where a PTSO or club has an offline registration process or a separate 3<sup>rd</sup> party registration system, such organizations may gather information relating to all of their members, and then submit a list of all such members in a file in CSV format.

The system shall provide a template of the format for the upload file plus documentation of the format requirements. Once a file has been prepared the user must select and run the upload file verification function to determine if the file is valid to be uploaded. Once the file has been successfully validated the user may run the upload function.

The upload function should take the file and automatically validate the entries. If there are no questionable records the import should proceed and a success message with the number of entries displayed. A display/report should be generated listing the valid entries, invalid entries (and potential duplicates) only if questionable data is being submitted.

For invalid entries a CSV of only those invalid entries can be retrieved so that issues can be fixed for a subsequent attempt.

The system shall detect potential duplicate records of the same member. The user shall review these and resolve any duplicates encountered online.

The list of members from the PTSO or club must have the membership category designated and, after the list is submitted, the registration would move into payment processing. The system would determine which members have not already paid their appropriate membership fees (noting that they may have fees paid by a different club) and create an invoice of fees due. The PTSO or club would then pay the fees.

All members who are registered in this manner will receive an email notifying them that they have been registered, whether any outstanding fees are due, and whether there are any additional requirements for membership (e.g., agreement to terms, submission of documents, etc.).

#### **6.4.3. Third Party Registration**

In general, whenever a member is registered for an event or membership (such as by an administrator via a bulk upload) the system should send an email to inform them of their registration. In the case where a third party has registered them, the message should encourage them to either create an account or check their account to ensure the information in it is correct and up to date. Additionally, they should be informed that if they do NOT wish to be registered for the event they should contact the event organizer.

In the case where a member has had their membership paid by a third party, the email message should explain this and encourage the member to save the membership information as it may be required to register in another event later in the season.

The message that is sent to the member when they are registered by a third party should be editable by the administrator.

#### **6.4.4. Acceptance of Waivers/Policies**

During any registration process, the system shall display the various policies and waivers as set up by the administrator when creating the registration form. The user shall be able to perform an online

acceptance of the policies and waivers prescribed as conditions required for registration prior to proceeding to registration and payment. New records created during a mass import should not automatically acknowledge acceptance; this process must be done by the individual user.

The acknowledgment should track of the text of the waivers/policies agreed to, and a date/timestamp of acceptance.

The system should archive the waivers and policy document the user agrees to, as these normally do change from time to time.

The system must also notify users when any of these items change, allowing the user to review and agree before a set deadline.

## **6.5. Payment Processing**

Once the registration information has been input then the account holder will proceed to payment processing. An invoice will be generated by the system (or the “shopping cart” paradigm may be used, where a list of items to be purchased is prepared for payment). The user would then be navigated to the payment process (or they may need to select to “Proceed to Checkout”).

The system shall support the following methods of payment:

- Credit cards, paypal, etc.
- Cheque/Cash

It would be preferable that the system also support pre-authorized recurring payments.

In the case of payment by cash/cheque, the system shall generate an Invoice and send that to the Account Holder instead of a receipt. When the cash/cheque is received by WCL, CAWO, a PTSO, Event Organizer, or club, the administrator can then select the registration record and indicate that payment has been received. At that time a receipt is sent by email to the account holder.

The system shall support transaction splitting amongst accounts. For example, if a membership fee being paid has a component due to the PTSO and a portion to the club, the system shall be able to direct the correct amounts to the separate accounts of the respective organizations. Similarly, an individual registering for an event with an event organizer may be required to pay membership fees to a club, PTSO, or WCL. Also, some events may have a charitable cause tied to participation and donations to this cause should be possible (and in some cases, required) during payment.

Once the registration process has been successfully completed and submitted, the account holder (and registrants, in the case where the registrant(s) are not the account holder, such as in bulk registrations by an administrator) will be sent a confirmation email. The confirmation email shall summarize the registration information and shall include the invoice/receipt. The confirmation email shall be editable by the event organizer so they can tailor the message as may suit the situation.

## **6.6. Refunds**

The system shall support the capability to provide refunds for amounts previously paid, where such a refund must be authorized by the appropriate administrator. The refund amount can be for all or a portion of the previously paid amount. Refunds should be either sent as a credit to the account or a payment to the account holder.

## **6.7. Listing an Event**

An Event Organizer shall be able to submit information about an event and/or for the purpose of informing WCL, CAWO, PTSO, and Clubs about their intent to offer an event. In submitting this information, the Event Organizer must provide the date and location of the event as well as an overview of activities that are proposed to be offered. Upon receipt of this submission from an Event Organizer, the appropriate administrator shall be able to review the information provided to determine if it is acceptable to publish to the information on the proposed event list for viewing on the System.

### **6.7.1. Request to Sanction a Competition**

An Event Organizer shall be able to request a sanction for an event from WCL, CAWO or the PTSO. The Event Organizer will provide, as a minimum, the following event information when submitting a sanctioning request:

- Date of proposed event;
- Location of event
- Proposed activities

### **6.7.2. Designation of Sanction**

Once the appropriate representative has undertaken the sanctioning process, they shall be able to then designate the event as being sanctioned. The Administrator shall be able to log into the System, select the event and designate that the event as being sanctioned. Until this is done, the event shall be designated as unsanctioned. Only sanctioned events will be shown on an event list calendar.

## **6.8. Promotions**

The System should support various mechanisms for discounts and promotions relating to event registration. For example, the system should support coupon codes, “gifts” for registration, early bird periods, etc.

## **6.9. Social Media**

The System should support integration with appropriate social media channels that would improve the value and interest for the System amongst its users. Implementing this request will be considered post-initial delivery.

## **7. OTHER SYSTEM REQUIREMENTS**

### **7.1. Information Integrity and Availability**

The system supplier shall ensure the integrity and availability of all information in the System. They shall ensure that capabilities such as data backup, archival and restoration are available.

### **7.2. General UI Considerations**

The system should work with the current desktop browser versions of Microsoft Edge, Chrome, Firefox, and Safari plus the last major version. The expectation is that responsive design will be used in all implementation. On tablets, the front end should support both the Safari and Chrome browsers and all aspects of operation. On mobile (phone) devices, event viewing and subsequent registration are the primary tasks, other administrative functions may require more space than is available to be practical.

The system must have clear guidelines for both administrators and members on what will function on mobile devices and what will not; Ideally it would prevent access to parts of the system that would be impractical to use on a small mobile screen.

### **7.3. Multi-language Support**

The system user interface must be available in English or French. The system should support international character sets for input. The user may be able to toggle between language at any time and from any screen.

### **7.4. Online Help**

The system shall provide a practical online help facility with the ability for WCL to edit the contents to adapt to user feedback and create addition help FAQs and other documents.

### **7.5. Support Requests**

The system should allow users to send support requests to administrators via email.

### **7.6. Training Support**

The system supplier shall also provide support for the training of administrators in using the system. Ideally a small system with artificial data be deployed for training purposes.

### **7.7. Protection of Personal Information**

The system shall provide features, such as data encryption while data is in transit or at rest, that ensure the protection of personal information stored in the System. The information should be protected in compliance with personal information protection regulations and standards as set out in Canada and its respective Provinces/Territories.

## **7.8. Security Standards Compliance**

As the System shall be storing personal information as well as processing financial transactions, the supplier of the System shall preferably be compliant with Payment Card Industry (PCI) Data Security Standards (DSS) and ISO 27001 and shall maintain certification to this standard for the duration of their supply contract.

## **7.9. Multiple Concurrent Users**

The system shall support the capability for multiple concurrent users logging into the system without a significant degradation in system performance. The vendor will supply a baseline minimum hardware/platform/OS specification to WCL.

## **7.10. High Availability**

Due to the critical business nature of the system, the system must remain available and in operation at least 99% of the time.

## **7.11. Offline Mode**

The system should be capable of being taken offline for maintenance/upgrades in a controlled manner that does not corrupt data, logs out users appropriately and notifies users who try to log in that the system is offline with an ETA of it coming back online.

## **7.12 Information Persistence**

Information relating to Participants and their Accounts must persist online transparent to the System users for at least three years (after becoming inactive) at which point it may be archived. Participants and their Accounts may become inactive but should never be deleted or removed.

## **7.13. Deliverables**

Beyond the system code, the design documents, test plans, automated test suites, and sample data should all be deliverables of the project. These items should not have significant restrictions that would prohibit future use by WCL to repair, adapt or improve the system.