<insert NSO logo>

National <Sport Name> Registration System

Statement of Requirements

**<date>**

**Version: 0.1**

**Revision: 1**

**<Sport Org Name>**

*The recipient of this information hereby acknowledges and agrees that such information is proprietary to <Sport Org Name> and shall not be used, disclosed, and/or duplicated except with express written authorization.*

**TABLE OF CONTENTS**

1. Introduction 1

1.1. Scope 1

1.2. Audience 1

1.3. Objective 1

2. Overview 2

2.1. System Context 3

3. Information Model 4

3.1. Organizations 4

3.2. Participants 4

3.3. Events 6

3.4. Membership 7

4. Administration 8

4.1. NSO Administration 8

4.1.1 Manage NSO Information 8

4.1.2 Manage Participant Information 9

4.1.3 Manage Events 10

4.1.4 Communication 11

4.1.5 Disciplinary Action 12

4.2. PSO Administration 12

4.2.1 Manage PSO Information 12

4.2.2 Manage Participant Information 12

4.2.3 Manage Events 14

4.2.4 Communication 15

4.2.5 Disciplinary Action 15

4.3. Club/Event Organizer Administration 16

4.4. Account Administration 16

4.5. Event Waitlists 16

4.6. Priority Registration 17

4.7. Copy/Save Events 17

4.8. User-Defined Fields for Events 17

4.9. Event Eligibility Rules 17

4.10. Administrative Reporting 17

4.10.1 Standard Reports 17

4.10.2 Ad-hoc Reporting 18

4.10.3 Accounting Reports 18

4.10.4 Executive Reporting 18

4.10.5 Information Exporting 18

4.11. Officials Information Management 19

5. Registration 20

5.1. View Events 20

5.1.1 View Competition List 20

5.2. Accounts 21

5.2.1 Account Creation 21

5.2.2 Maintain Account 21

5.2.3 Controls to Minimize Duplicate Participants 22

5.3. Event Registration 22

5.3.1 Registration of Individual 22

5.3.2 Register Club for Affiliation 23

5.3.3 Register Club Participants for Membership 23

5.3.4 Change Club Contact 25

5.3.5 Third Party Registration 25

5.3.6 Team/Group Registration 25

5.3.7 Acceptance of Waivers/Policies 26

5.4. Payment Processing 27

5.5. Competition Registration 28

5.5.1 List a Competition Competition 28

5.5.2 Request to Sanction a Competition 28

5.5.3 Register Participants for a Competition 29

5.5.4 Upload Results from a Competition 29

5.6. Results and Rankings 29

5.6.1 Athlete Performance 29

5.6.2 Rankings 29

5.6.3 Record Management 30

5.7. Certificate of Insurance 30

5.8. Promotions 30

5.9. Add-On Products/Services 30

5.10. Social Media 30

5.11. Competition Management System Interface 31

6. System Administration 32

6.1. Information Integrity and Availability 32

6.2. Multi-language Support 32

6.3. Online Help 32

6.4. Training Support 32

7. Characteristics 33

7.1. Performance 33

7.2. Information Management 33

7.2.1 Protection of Personal Information 33

7.2.2 Security Standards Compliance 33

7.2.3 Information Persistence 33

7.3. User Audit Trail 33

7.4. Multiple Concurrent Users 34

7.5. High Availability 34

7.6. Browser Interface 34

7.7. Adaptability 34

Appendix A – Membership Policies and Procedures 35

# Introduction

## Scope

This document provides the high level requirements for the National <Sport Name> Registration System (NxRS) envisaged for <Sport Name> in Canada.

## Audience

The intended audience for this document is the national and provincial <Sport Name> authorities in Canada as well as potential system suppliers for the NxRS.

## Objective

This document is intended to reflect the common vision for high-level requirements on a National <Sport Name> Registration System. 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 the Canadian <Sport Name> authorities to a level where they are able to provide system solutions that meet these requirements.

# Overview

*{This section should be customized to provide an overview of the sport, system and objectives}*

<Sport Name> in Canada is organized with a unique National Sport Office (NSO) and a unique Provincial Sporting Organization (PSO) for each province/territory. Both the NSO and each PSO organize and offer various types of <Sport Name> events for <Sport Name> participants in Canada. These can be competitions such as competitions, training opportunities for athletes such as camps or clinics, or leadership development events for coaches, officials or administrators. Generally speaking, the <Sport Name> season runs from xxxx through xxx.

It is the current policy of the NSO and PSOs that registrants generally are members of the PSO of their residence. Members may be members of a Club or they can be unattached. Membership fees vary according to the participant’s role. Membership is designated over a 12 month period from xxx 1 through xxx 31. Note that individual membership is purchased at the PSO level only and *{that entitles the member to be part of the NSO as well…}.* .. It should be noted that the NxRS is intended to be capable of providing event registration services to any Canadian in every PSO, however, the system must also allow for the possibility that a PSO may have a distinct system (manual or automated) for undertaking their own membership and event registration. As the NxRS must be accessible to all Canadians, it must support both official languages.

The National <Sport Name> Registration System (NxRS) is intended to meet the following objectives:

* Allow <Sport Name> participants in Canada to register for activities offered by the NSO and their PSO, including the collection of fees for those events;
* Allow <Sport Name> participants to register with their Club, PSO, NSO and other <Sport Name> Event Organizers.
* Allow the NSO and PSOs to maintain up-to-date information on <Sport Name> participants so they are able to provide both quality and efficient services in both defining and delivering their events.
* Ensure a quality customer experience in registering for events while allowing the NSO and PSOs to have visibility and control of the customer relationship.

Note that while it is primarily intended that the NxRS will provide the capability for the NSO and PSOs to offer registration services, *we wish to be able to also offer this capability in the NxRS to Clubs or other <Sport Name> Event Organizers {??}.* In this case, the PSO’s would be able to establish such associations as Event Organizers in the NxRS under their jurisdiction. 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.

## System Context

The following diagram provides a system context diagram for the NxRS. This provides a context for the NxRS and its interrelationships with other systems.

Club Administration System

Registration / Membership

Competitions / Events Management

Communications

Performance / Results Management

* Participants
* Events

Competition Management System

NCCP Coach Information

**NTRS**

Officials Information Management

**Figure 2-1: NxRS System Context Diagram**

# 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.

## Organizations

**“National Sport Organization (NSO)”** – the association with the unique mandate as the sport governing body for <Sport Name> in Canada. The NSO will typically have one or more **NSO Administrators** who have authority to administer the NxRS on behalf of the NSO. The NSO Administrator shall be able to edit information relating to NSO events, and shall be able to view and edit information on Participants and Clubs that have registered with the NSO or registered as participants in their events. Certain types of NSO administrators may be restricted to a subset of capabilities.

**“Provincial Sporting Organization (PSO)”** – the association with the unique mandate as the sport governing body for <Sport Name> in their province or territory. The PSO will typically have one or more **PSO Administrators** who have authority to administer the NxRS on behalf of the PSO. A PSO Administrator shall have visibility into all events, individuals, clubs, etc within their PSO. The PSO Administrator shall be able to edit information relating to their PSO events, and shall be able to view and edit information on Participants and Clubs that have registered with the PSO or registered as participants in their events. The PSO controls access to the NxRS by the Clubs. Certain types of PSO administrators may be restricted to a subset of capabilities such as Officials administration only.

{*Clubs and Event Organizers may or may not be applicable to a sport’s organization or requirements…}*

**“Club”** - means any organized group of persons associated for the purpose of <Sport Name> and registered through their PSO 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. PSO’s act as the agent in determining what Clubs are able to affiliate with the PSO and NSO.

**“Event Organizer”** – a distinct organization (distinct from the NSO, PSO’s, and Clubs) that operates <Sport Name> events. Typically they would be organizers of <Sport Name> competitions who may wish to utilize the NxRS for registration of participants in the events they organize.

## Participants

Individuals may participate in <Sport Name> events in a variety of roles, including:

* athlete;
* Coach;
* Assistant Coach
* Integrated Support Team (IST);
* Event Organizer;
* Club Contact;
* Volunteer;
* **Official** – an individual certified to officiate at a <Sport Name> competition;
* **NSO, PSO or Club Volunteers** – individuals typically serving as Executive, Board, Committee or volunteer members for the respective association.

Note that Participants do not necessarily have to be Members of a PSO or NSO.

**“Participant Profile”** – information stored that relates to the Participants personal information. The ability to collect the following types of information relating to Participants should be maintained in the system:

* Name (required)
* Date of Birth (required)
* Gender (required)
* Address/City/Province/Postal Code (required)
* Region (required)
* Email address (required)
* Phone number(s) (required)
  + Consent to allow text communications
* Aboriginal Status
* Para-athlete Status
* Parent/Guardian Information (including address and contact information, in the case where the Participant is under the age of consent)
* Health Insurance Number (optional)
* Medical Conditions (stored only at the option of the participant for events)
* Emergency contact information
* History of Police Record Checks (PRC) and Vulnerable Sector Screening (VSS) (if applicable)
  + Date of latest PRC and result
  + Date of latest VSS and result
* Coaching certification information
* Learning Facilitator designation/levels
* Officiating certification information, including:
  + Status and certification level(s) in <Sport Name>
  + History of officiating clinics, training and assessments
  + History of competitions that have been officiated
* History of participation (including associated Club(s) and membership)
* History of event registration
* History of competition results
* Status of good-standing
* History of any disciplinary action
  + Textual description
  + date range of any sanction conditions
* Email subscription/exclusion indicators

The system should support the ability to store documents associated with personal profiles, including scans of Proof of Age as well as personal photos.

The system shall be able to store and maintain information on competition results for athletes on an ongoing basis over their lifetime.

*{Athletes may have additional sport-specific information or attributes relating to sport performance:*

* *Personal performance information, “personal bests”;*
* *Accreditations, carding, licenses, status designations;*
* *Other?}*

Participant records 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.

**“Account”** – 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 one individual (or possibly both parents) designated as the Parent/Guardian(s). The Parent/Guardian typically must take responsibility for both legal and payment obligations for the children 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 (i.e. there should not be duplicate participant records in this case). The Account will also be used by the account holder to maintain personal information for each Participant such as address, phone number email address, emergency contacts, etc.

## Events

For the purpose of the NxRS an **Even**t 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 – the NSO, PSO, Event Organizer or Club.

**“Competition”** – a <Sport Name> competition event that is typically organized for athletes over a day (or days). A competition will typically have a **Competition Director** designated as a point of contact.

**“Training Camp”, “Clinic”, “Training Course”, “Tryout”, “Meeting”, “Symposium”, “Fundraiser”, “Banquet”, “Sanctioned Event”** – examples of other types of events for which individuals my wish to register.

**“Invitation-Only Event”** – Events can be designated such that only those individuals invited to register for the Event may register for it.

## Membership

A Participant is a **Member** at a prescribed **Membership Category** if they pay the **Membership Fee** in accordance with the policies of the NSO and PSO (Appendix A). Most Events require individuals to be registered at a prescribed **Membership** **Category** before they are permitted to register for that Event. Membership categories and fees are defined distinctly at the PSO level.

Membership provides specific services over a 12 month period (currently defined as xxx through xxx). A Participant should be able to purchase membership for a future year while being a member for the current membership year. If an Event requires membership as a pre-requisite, then the Participant must hold that membership for the season in when the Event occurs.

# Administration

The NxRS shall accommodate three tiers of Organizations that can manage events and registrations on the NxRS:

1. The NSO
2. PSOs
3. Clubs and other Event Organizers

An NSO Administrator shall be able to view and edit all Participants, Clubs, and Event Organizers across the NSO and all PSO’s where the Participants are members of the NSO or participants in NSO events. The NSO Administrator shall be able to edit information relating to NSO events however can only view information relating to events owned by PSO, Clubs and Event Organizers.

A PSO 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 would have no visibility into Participants and Clubs for other PSOs. They would be able to view information on Events that are organized by the NSO or other PSO’s. A PSO Administrator will control access to the system by Clubs and Event Organizers.

The Club and Event Organizer Administrators shall be able to control access, view and edit information relating to all Participants who register within their organization and for their Events. They would have no visibility into Participant information for other Clubs or Event Organizers. They would be able to view information on Events that are organized by the NSO, PSO’s and other Clubs.

## NSO Administration

The NxRS shall support a NSO **Administrator** role which would have the following capabilities.

### Manage NSO Information

The NSO Administrator shall be able to manage the following information relating to the NSO:

* Configuration of Competitive Categories at the national level, including the creation of age categories, competition types, and sanction types;
* Configuration of tax information applying to NSO registration fees;
* Creation and editing of General Ledger account names for use with financial transactions;
* Configuration of membership categories, membership season start/end dates and associated fees for membership at the NSO level (or configure that there is no membership at the NSO level).

### Manage Participant Information

#### Search Functions

The NSO Administrator shall be able to search for Participants, Accounts, and Clubs by a variety of search criteria.

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

* First and/or last name
* Member ID number
* Email address
* PSO; Region
* Club
* Membership Category and Season
* Competitive Category(s)
* Age; gender
* Coaching certification level; Learning facilitator designation
* Officiating certification level

Upon receipt of the search results Participant information can then be selected for viewing or editing. Additionally the NSO Administrator may be able to select to send an email message to all Participants in the list.

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

* Account Username
* Email address
* First and/or last name of Account Holder
* First and/or Last Name of Participant associated with an Account
* PSO and Club
* Outstanding Payables

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

Clubs and Event Organizers can be searched for by (at least) the following criteria:

* Name
* PSO, Region
* Competitive Category(s)
* Status

Upon receipt of the search results Club/Event Organizer 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/Event Organizer) the system shall also be able to print the search result list or download the list into a file (at least in CSV and semi-colon delimited).

#### Editing Participant Information

The NSO Administrator shall be able to edit information on Participants and Clubs that have registered as Members of the NSO or registered as participants in their events:

* Add and edit Participants and their associated information;
* Add and edit Accounts and their associated information;
* Add and edit Clubs and their associated information;

Note that while the NSO Administrator shall have the capability to edit information on Participants and Clubs this is typically only done to support the PSO Administrator.

#### Account Password Changes

The system shall provide the ability for an Account Holder to change their password.

### Manage Events

The NSO Administrator shall be able to view all Events in the NxRS including NSO, PSO, Club and Event Organizer Events. The NSO Administrator shall only be able to edit NSO events.

The NSO Administrator shall be able to create and manage the following information for NSO Events in the NxRS:

* Event Type (for example, “Membership”, “Competition”, “Competition Sanction Request”, “Meeting”, “Camp”, “Clinic”, “Fundraiser”, “Tryout”, etc);
* Competition Categories (if event is a Competition);
* Event Name;
* Event Description;
* Location;
* Venue;
* Event Contact Person (including contact email and phone number);
* Start and End date and time;
* Membership Category pre-requisite (if any);
* Performance Pre-requisites (if any);
* Age Class(es) (if applicable);
* Start and End Date for registration;
* Registration Fee (and associated taxability requirements);
* G/L Account for fee income;
* Individual or team registration;
* Minimum/Maximum number of registrants;
* Definition of eligibility prerequisites for the event (for example, Level 1 certification before eligible to sign up for Level 2, age requirements, pre-requisite license or accreditation etc)
* Payment Method options to be offered;
* Waitlist option;
* 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 (map, poster, etc)
* Ability to create customizable fields for events where we can gather info we need on participants. (for example allergies, medication info, t-shirt size, special pick up or drop off instructions, etc)

In the case of Competition events, it is periodically the case that registration for these events occurs with a 3rd party Event Organizer who may have a distinct Competition Management System. See section 5.8 for further details.

The NSO Administrator shall be able to view and edit the list of registrants for any NSO event in the NxRS. He may also remove participants from the registration list. The NSO Administrator may authorize and process full or partial refunds to a registered participant who has previous paid the event fee. The NSO Administrator shall be able to move registrants from one event to another (for example, in the case where an event is cancelled and a comparable one is available in its place.)

### Communication

The NSO Administrator shall be able to utilize various selection criteria to be able to create a list of Participants to whom they may then send an email message. The message should clearly indicate that the message is from the NSO. The message body should be able to be formatted in HTML to allow richer and more appealing viewing. This formatting must allow branding of the message by the NSO. The system should maintain and display information relating to the status of the messages sent such as messages rejected, messages read, message unopened, etc.

Email messages should include both CC and BCC capabilities and ability to add attachments.

### Disciplinary Action

The NSO Administrator shall be able to edit a Participant’s record to indicate any disciplinary actions that may have been imposed by the NSO. The system shall allow a description of any such actions and the date such actions were imposed. Furthermore, if such actions impose constraints on the Participant’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 Administrator if such an individual attempts to register for an event.

Comments on disciplinary action cannot ever be revised or deleted.

## PSO Administration

The NxRS shall support a **PSO Administrator** role which would have the following capabilities.

### Manage PSO Information

The PSO Administrator shall be able to manage the following information relating to the PSO:

* Configuration of PSO information and their Regions and Clubs
* Configuration of PSO membership categories and associated fees for membership at the PSO level;
* Configuration of Competitive Categories at the PSO level, including the creation of age categories, competition types, and sanction types;
* Configuration of tax information applying to PSO registration fees;
* Creation and editing of General Ledger account names for use with financial transactions;

### Manage Participant Information

#### Search Functions

The PSO Administrator shall be able to search for Participants, Accounts, and Clubs in the PSO by a variety of search criteria.

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

* First and/or last name
* Member ID number
* Email address
* Region
* Club
* Membership Category; Season
* Competitive Category(s)
* Age; gender
* Coaching certification level; Learning facilitator designation
* Officiating certification level

Upon receipt of the search results Participant information can then be selected for viewing or editing. Additionally the PSO Administrator may be able to select to send an email message to all Participants in the list.

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

* Account Username
* Email address
* First and/or last name of Account Holder
* First and/or Last Name of Participant associated with an Account
* Club
* Outstanding Payables

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

Clubs and Event Organizers can be searched for by (at least) the following criteria:

* Name or Identifier/Code
* Region
* Competitive Category(s)
* Status

Upon receipt of the search results Club/Event Organizer 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/Event Organizers) the system shall also be able to print the search result list or download the list into a file (at least in CSV and semi-colon delimited).

#### Editing Participant Information

The PSO Administrator shall be able to manage the following information relating to all Participants in their PSO:

* Add and edit Participants and their associated information;
* Add and edit Accounts and their associated information;
* Add and edit Clubs and their associated information;

#### Account Password Changes

The system shall provide the ability for an Account Holder to change their password.

The system shall provide the ability for the respective administrators to reset user names and passwords.

### Manage Events

The PSO Administrator shall be able to view all Events in the NxRS including NSO, Club, and Event Organizer Events. The PSO Administrator shall only be able to edit PSO Events.

The PSO Administrator shall be able to create and manage the following information for PSO Events in the NxRS:

* Event Type (for example, “Membership”, “Competition”, “Competition Sanction Request”, “Meeting”, “Camp”, “Clinic”, “Fundraiser”, “Tryout”, etc);
* Competition Category (if event is a Competition);
* Event Name;
* Event Description;
* Location;
* Venue;
* Event Contact Person (including contact email and phone number);
* Start and End date and time;
* Membership Category pre-requisite (if any, potentially for each of the NSO and PSO membership categories);
* Performance Pre-requisites (for example, a competition that requires a sport-specific license);
* Age Class (if applicable);
* Start and End Date for registration;
* Registration Fee (and associated taxability requirements);
* G/L Account for fee income;
* Minimum/Maximum number of registrants;
* Definition of eligibility prerequisites for the event (for example, previous performance prerequisite, Level 1 certification before eligible to sign up for Level 2, age requirements, etc)
* Payment Method options to be offered;
* Waitlist option (see section 4.1.3.1 Event Waitlists);
* Event may be optionally designated as “Sanctioned” or “Unsanctioned”
* Textual annotations including terms/conditions, waiver of liability, etc.
* Ability to attach PDF files associated with the event (map, poster, etc)
* Ability to have customizable fields that the PSO can create to collect information they need for that event (i.e. t-shirt size, allergy info, medication info, special pick up or drop off time instructions, etc.)

In the case of Competition events, it is possible that registration for these events occurs with a 3rd party Event Organizer who may have a distinct Competition Management System. See section 5.8 for further details.

The PSO Administrator shall be able to view and edit the list of registrants for any PSO event. He may also remove participants from the registration list. The PSO Administrator may authorize and process full or partial refunds to a registered participant who has previously paid the event fee. The PSO Administrator shall also be able to move registrants from one event to another (for example, in the case where an event is cancelled and a comparable available in its place).

### Communication

The PSO Administrator shall be able to utilize various selection criteria to be able to create a list of Participants to whom they may then send an email message. The message should clearly indicate that the message is from the PSO. The message body should be able to be formatted in HTML to allow richer and more appealing viewing. This formatting must allow branding of the message by the PSO. The system should maintain and display information relating to the status of the messages sent such as messages rejected, messages read, message unopened, etc.

Email messages should include both CC and BCC capabilities.

### Disciplinary Action

The PSO Administrator shall be able to edit a Participant’s record to indicate any disciplinary actions that may have been imposed by the PSO. The system shall allow a description of any such actions and the date such actions were imposed. Furthermore, if such actions impose constraints on the Participant’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.

Comments on disciplinary action cannot ever be revised or deleted.

## Club/Event Organizer Administration

For any Club or Event Organizer that is to utilize the NxRS for its own registration needs, the PSO Administrator would provide an analogous administration user role with analogous capabilities as noted on sections 4.1 and 4.2.

## Account Administration

Both the PSO and NSO Administrators shall have the capability to administer user accounts on the NxRS within their organizations. There shall be a single master system administration account at each of the NSO and PSO levels that shall have the authority to administer all other accounts. Examples of Administrative Accounts to support different roles might be:

* NSO National Event Coordinator;
* PSO Membership Registrar;
* PSO Coaching Administrator;
* Club Administrator:
* Competition Organizer;
* Competition Sanction Officer;

The system administrator shall be able to create or modify a user administration account that corresponds to a specific user role, and shall be able to specify which functions that user shall be able to perform from within that account.

## Event Waitlists

If an event was created with the Waitlist option, then the system will maintain an ordered list of entrants who wish to be waitlisted in the case that the event has achieved its maximum number of registrants. The NSO/PSO Administrator shall be able to invite waitlisted Participants to register, view invitations and dates of invitations. The NSO/PSO Administrator shall also be able to manually override the waitlist priority queue. Once a registrant is offered a spot from the waitlist they must confirm or decline the invitation, and if confirming they must complete the payment process.

## Priority Registration

The system should optionally provide methods for maintaining prioritized registration. For example, the system should support a method for allowing registrants who have previously participated in an event or group of events to have priority in registering for the upcoming event. Additionally, the system may support the prioritization of registrants who may have additional qualifications in comparison with other registrants.

## 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 copy existing or previous Event information, 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.

## User-Defined Fields for Events

The system shall support the capability for having user-defined fields that can be defined by Event Administrators when they create an Event. For example, the Administrator should be able to define the text field prompt for a field value (“Specify T-shirt size:”) and allow either a free format text field response or an enumerated field response (“S”, “M”, “L”, “XL”). The system should support up to 5 user-defined fields for each event.

## Event Eligibility Rules

The system shall provide checking of eligibility rules for events such as:

* Participant age constraints
* Gender constraints
* Membership Category requirements
* Previous performance standards
* Pre-requisite qualifications or licenses (coaching or officiating certification level)
* PRC/VSS clearance

## Administrative Reporting

### Standard Reports

The NxRS shall, at a minimum, produce the following standard reports, with full filtering capabilities:

* [Event Reports](https://vcnrs.ifathom.ca/Event/EventTeams)(event registrants, outstanding payables for event, etc)
* [Audit Log](https://vcnrs.ifathom.ca/PTAAdmin/AuditLog)
* Club List
* Membership Reports by category/year/PSO/Region/Club, including other Membership filters:
  + Aboriginal report
  + Para-athlete Report
  + Volunteers
  + Club Information Report
* Account Report

### Ad-hoc Reporting

The NxRS shall be able to produce ad-hoc reports based on selection criteria determined by the NSO/PSO Administrator. Note that PSO Administrators shall only be able to report on the entities visible within their context.

### Accounting Reports

The NxRS 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.

### Executive Reporting

The NxRS shall provide reporting and information query functions that will support Executive needs in the NSO and PSOs for business intelligence on their registered participants. 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. As well, the system should be able to report on retention rates for members from year to year.

### Information Exporting

The system shall, for each standard report and ad-hoc report, also be able to export the data selected into a file in standard formats (such as CSV).

## Officials Information Management

The system shall maintain information relating on the status, history and certification of Officials. The system shall allow Administrators the ability to create, edit and delete Participant information relating to Officiating activities, including the following information:

* General Participant Profile information as noted in section 3.2;
* Status and certification level(s)
* History of officiating clinics, training and assessments
* History of competitions that have been officiated

The Administrator shall be able to view a list of Officials and filter by the following criteria:

* PSO
* Certification Type
* Certification Level
* Status

Upon receipt of the list of entities matching any of the above search criteria the system shall also be able to print the search result list or download the list into a file (at least in CSV and semi-colon delimited). Additionally the system shall allow the Administrator to send a message to the Officials in the list.

# Registration

As one of the primary objectives of the NxRS is to allow potential customers an easy method to view and purchase the offerings of the NSO, PSOs, Clubs, or Event Organizers, the NxRS 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 PC’s, Apple devices and mobile devices, and for use with various internet browsers.

## View Events

Anyone should be able to view available events on the NxRS. If a user navigates to the NxRS they should be able to view all events however they should also be able to select the view of the NSO, PSO, Club or Event Organizer. In the case where the user is directed to the NxRS from a NSO, PSO, Club or Event Organizer 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 user shall be able to select an event shown and obtain further details on that event.

The user shall be able to select to register for an event shown (see section 5.3 Event Registration). In this case, the user should be able to either log in to an account or create a new account (see section 5.2 Accounts)

### View Competition List

Competitions are important types of events that users shall be able to view. A user should be able to filter the list of Competitions by the following criteria:

* Season
* Month
* Location
* Event Organizer
* Competition Type
* Competitive Categories
* Upcoming or Past Events

For upcoming Competitions the user shall be able to view if the Competition has been sanctioned and shall be able to obtain competition information.

## Accounts

### Account Creation

The user must designate if they wish to establish an Individual Account or Family Account. For Individual Accounts there may be only one Participant associated with the Account who is also the Account Holder. For Family Accounts there may be multiple Participants with the Account Holder designated as the Parent/Guardian. The Parent/Guardian typically must take responsibility for both legal and payment obligations for underage Participants. There may be two individuals designated as Parent/Guardian.

The user shall 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 Parent/Guardian(s) may add or delete Participants for whom they will agree to undertake legal (for example, for Waiver of Liability, Informed Consent, 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 Participants. The account will also maintain personal information for each Participant in the account.

### 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, other than they cannot change their first name, last name or date of birth. For family accounts the account holder may add, edit or delete Participants within the family from the account. (NOTE: “deletion” must never remove the Participant information. It only removes the link to the account.)

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

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

#### Background Check Status

Background checks usually require a Personal Record Check (PRC) and Vulnerable Sector Screening (VSS). Users may log into their Accounts and edit the Participant Profiles to indicate the date of PRC/VSS verification for each of PRC and VSS and the results of those searches. They may also attach a scan of the PRC/VSS confirmation letter. The system should be able to send a message to the User when their PRC/VSS status is required to be renewed (where the triggering condition is configurable by the Administrator).

### Controls to Minimize Duplicate Participants

The system should provide capabilities that can minimize the potential for duplicate records for the same Participant. For example, if a user creates a new Participant, the system may check its database for existing Participants and determine if there is an existing Participant 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 merge duplicate records the potential duplicates.

## Event Registration

### Registration of Individual

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.

A user may register for an event using an existing Account they may have created previously or they may register without an Account. Assuming the user has created or is logged into their Account and has selected to register for an event, the system will utilize 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 Participant is eligible and there is space in the event, then the Participant will proceed to Payment Processing.

In the case where a registrant does not have an existing Account, the system shall either:

1. Prompt the user to enter the required information for registration for the event and automatically set up an account from that information, or
2. Prompt the user to create an account before undertaking the registration.

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

Many events will require the Participant to be of a prescribed Membership Category before being able to register for an event. In this case the Participant does not have such a membership then the system will prompt the user that they need to purchase the membership (for example this could be a day membership or an annual one), 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 (see section 5.4 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 shall 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.

### Register Club for Affiliation

At the outset of a season a Club may have to apply for affiliation with a PSO. 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 PSO may need to verify that the Club meets any PSO conditions before the Club is approved for the season. The PSO 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 PSO. Once the PSO is satisfied that a Club meets all the requirements for affiliation, the PSO 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.

### Register Club Participants for Membership

Affiliated Clubs shall be able to register their Participants (athletes, coaches, team managers, club administrators, officials, etc) for membership with the PSO and the NSO. The system shall support member registration as follows:

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

#### 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 NxRS. The Club will designate an individual to be the Club CTRA Administrator and provide them with an initial Account.

The NxRS Club Registration Portal will function similarly to the NSO 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 NxRS Club Registration Portal to register members for their Club Membership as set out in section 5.3.1 Registration of an Individual. The NxRS Club Registration Portal should also be able to offer PSO/NSO membership together with Club Membership as a common registration transaction.

#### Bulk Upload of Club Membership

In the case where a Club has an offline club membership process or a separate 3rd party registration system, such Clubs may gather information relating to all of their participants who are required to register for membership with the PSO and NSO, and then submit a list of all such Participants to register for membership 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 system shall detect potential duplicate records of the same Participant. The user shall review these and resolve any duplicates encountered.

The list of Participants from the Club must have the membership category designated and subsequent to the list being submitted by the Club Contact, the registration would move into Payment Processing. The system would determine which Participants have not already paid their appropriate Membership Fees and create an Invoice of fees due. The Club Contact would then pay as set out in section 5.3.5. Payment Processing.

All Participants who are registered for membership by a Club in this manner will receive an email notifying them that they have been registered. (See section 5.3.7 Third Party Registration).

### Change Club Contact

If the Club Contact wishes to designate a new Club Contact they shall notify the PSO Administrator. The PSO Administrator shall also be able to change the Club Contact name and details.

### Third Party Registration

In general, whenever a Participant is registered for an event or membership the system shall 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 phone or email to indicate this.

In the case where the Participant has had their Membership paid by a third party, the email message should explain this and encourage the participant 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 Participant when they are registered by a Third Party should be editable by the registration event organizer.

### Team/Group Registration

The system shall support the ability to register teams or groups for team/group events.

In some cases the registrant and the team/group members must possess the correct membership category to be able to register for these types of events. Additionally an individual may wish to simply register a group of people for membership in a specific category.

The team event registration may or may not require the explicit specification of the team members (i.e. the Team Roster). The system shall allow the Administrator who is setting up the registration to designate if a Team Roster is required to be specified and if so, specify the minimum and maximum roster size.

A user may register a team for an event using an existing Account they may have created previously or they may register without an Account. Assuming the user has created or is logged into their Account and has selected to register for the event, the system will utilize 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 registrant and team are eligible and there is space in the event, then the registrant will proceed to Payment Processing.

As for individual registration, in the case where a registrant does not have an existing Account, the system shall either:

1. Prompt the user to enter the required information for registration for the event and automatically set up an account from that information, or
2. Prompt the user to create an account before undertaking the registration.

If the registrant or team members do not meet the eligibility requirements for the event, then they will be prompted with a message that explains the situation.

In the case where the event is full and the event allows wait-listing, the system shall 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.

#### Team Rosters

If an Event was created where the roster specification is required, the user may enter the roster at the time of registration or subsequently at any time prior to the Roster Lock deadline. Team Rosters may be edited by the Team Contact or the Coach. The system should provide auto-notification of an impending roster lock deadline by sending an email to the team contact and coach at a prescribed time period prior to the deadline (i.e. 72 hours?).

Administrators should have an override function that re-opens the roster for changes subsequent to the deadline.

Administrators should be able to download or print rosters for an event.

### Acceptance of Waivers/Policies

In any individual or team registration form the user 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.

## 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,
* Cheque/Cash

When setting up a specific registration form the Administrator shall have the option of designating what payment types he wishes to offer for registering for the event.

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 and registrant instead of a receipt. When the cash/cheque is received by the NSO, PSO, Club or Event Organizer 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.

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) 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.

The system shall support transaction splitting amongst accounts. For example, if a membership fee being paid has a component due to the PSO and a portion to the Club or Event Organizer the system shall be able to direct the correct amounts to the separate accounts of the respective organizations.

The system shall support batch disbursement of the registration proceeds to the beneficiary organization, or it may offer “real-time” disbursements to the beneficiary organization for each registration payment. In the case of batch disbursements, the frequency of disbursements shall be no longer than every month and preferably will be at the discretion of the beneficiary organization. Each batch disbursement shall be accompanied by a disbursement reconciliation report that details all transactions relating to that disbursement, including amounts withheld for transaction processing fees. The reconciliation report shall be provided in CSV format and be suitable to upload into a common accounting system. In the case of real-time disbursements, the system shall provide a Transaction Report that an Administrator can run at their discretion over a user-specified time frame.

#### Refunds

The system shall support the capability to provide refunds for amounts previously paid, where such a refund must be authorized by the appropriate NSO, PSO or Club Administrator who control the event. The refund amount can be for all or a portion of the previously paid amount.

## Competition Registration

The system shall support the following types of registration for a competition. Each type of event should allow the Administrator to designate a unique fee for registration in each specific event.

### List a Competition

A Competition Organizer shall be able to submit information about a competition and/or for the purpose of informing the PSO, NSO and Clubs about their intent to offer a Competition. In submitting this information, the Competition Organizer must provide the date and location of the Competition as well as an overview of events that are proposed to be offered. Upon receipt of this submission from a Competition Organizer, the PSO Admin shall be able to review the information provided to determine if it is acceptable to publish to the information on the proposed competition for viewing on the NxRS.

### Request to Sanction a Competition

A Competition Organizer shall be able to request a sanction for a competition from the PSO or NSO. The Competition Organizer will provide, as a minimum, the following competition information when submitting a sanctioning request:

* Date of proposed Competition;
* Location of competition;
* Proposed events and competitive categories to be offered.
* Type of Competition.

The system shall support the option that a fee is charged for the sanctioning process and this will be handled as described in section 5.3.5 Payment Processing.

#### Designation of Sanction

Once the PSO or NSO representative has undertaken the sanctioning process, they shall be able to then designate the Competition as being sanctioned. The PSO or NSO Administrator shall be able to log into the NxRS, select the Competition and designate that the competition is designated as being sanctioned. Until this is done, the meet shall be designated as unsanctioned. A sanctioned or unsanctioned Competition will show on a Competition list calendar

### Register Participants for a Competition

Participants may register for a Competition through the NxRS or through an independent 3rd party Registration System.

### Upload Results from a Competition

Subsequent to a competition the Competition Organizer shall be able to upload the competition results into the NxRS. The competition results information shall be saved with the Participant records for the athletes in the meet. As the competition results are typically compiled in a 3rd party system, the NxRS must be able to upload a results file produced by 3rd party Competition Management Systems, including the following:

* *Insert names of any commonly used Competition Management System*

Any user shall be able to view a report of the results of a competition on the NxRS subsequent to those being uploaded.

## Results and Rankings

The NxRS shall be able to display performance results for athletes in the following formats. Performance results shall be able to be viewed by any user of the system.

### Athlete Performance

The user shall be able to search for an athlete by specifying first and last name. The system shall return all matches and the user shall be able to then select an individual athlete record to view. The system shall be able to display:

* History of events and results;
* Personal bests (if applicable);
* Records;
* Biography

### Rankings

The user shall be able to view, export and save rankings of athletes by their performance results. Rankings shall be displayed by the following criteria:

* Gender;
* Para-athlete or not;
* Competitive category;
* Event Type;
* Between two dates

The user should have the ability to filter to any of the above criteria

### Record Management

The user shall be able to view record performances. Record performances shall be displayed by the following criteria:

* National Records, Provincial records
* Para records, able body records
* Gender;
* Para-athlete or not;
* Competitive category;
* Event Type;
* Season or All-Time

The system shall support the processes for approval and management of Records

## Certificate of Insurance

Registration with the NSO and/or PSO may qualify the registrant for certain types of insurance coverage provided by the NSO and/or PSO.

A Club Contact or Event Organizer should be able to obtain a Certificate of Insurance for a group of Participants (i.e. their Team, Club or Event Registrants) provided their group has satisfied the registration requirements set out by the NSO, PSO and/or insurer. The system shall provide a form to fill out that shall be directed to the Insurer (through the PSO) to obtain the Certificate of Insurance.

Note that this feature should be optional to the NSO, PSO, Club or Event Organizer.

## 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, etc.

## Add-On Products/Services

The system shall allow an Administrator to add on supplementary optional products/services to an event or membership registration.

## Social Media

It would be valuable for the system to support integration with appropriate social media channels that would improve the value and interest for the NxRS amongst its users.

## Competition Management System Interface

The system should be able to interface and/or integrate with a Competition Management System for registration and management of <Sport Name> competitions. Such a system would utilize information about participants, teams, clubs, officials and volunteers that are registered or assigned to the event from the NxRS for the purpose of schedule creation, resource allocation, results collection and information dissemination.

In the case of Competition events, the NxRS shall accommodate the following cases:

1. Registration for the Competition is done on the NxRS and the entry list is downloaded to the Competition Management System for the purpose of timing and results, or
2. Registration is done on the Competition Management System.

In the first case, the NxRS shall be able to produce a download file of competition entries in CSV format. The Competition Management System shall be able to upload the competition entries, undertake the timing and produce competition results. The NxRS shall be able to then upload a competition results file from the competition Management System.

In the second case, registration for these events occurs with a 3rd party Competition Management System. In this case, the NxRS shall be able to add and edit information about Competitions that are upcoming, their sanctioning status, entry deadlines and registration details. The NxRS shall be able to upload the results file produced by the Competition Management System.

# System Administration

## Information Integrity and Availability

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

Purging of the database will occur periodically. The purge period is configurable by either number of days or months. The process of purging data shall not destroy or delete personal information or personal performance history.

## Multi-language Support

The system user interface shall be available in English or French. The user may be able to toggle between language at any time and from any screen.

## Online Help

The system shall provide an Online help facility. This should include Frequently Asked Questions (FAQ’s).

The system should allow the NSO or any PSO to subscribe to receiving copies of online support requests.

## Training Support

The system supplier shall also provide support for the training of Administrators in using the system.

Interfaces

# Characteristics

## Performance

The system shall be able to support the following volume of data without noticeable degradation in performance:

* Over xx,000 participants
* Total annual transaction volume ($):  $xx,000,000
* Total annual transaction volume (No. of transactions):  xx,000

## Information Management

### Protection of Personal Information

The system shall provide features that ensure the protection of personal information stored in the NxRS. The information should be protected in compliance with Personal Information Protection regulations and standards as set out in Canada and its respective Provinces.

### Security Standards Compliance

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

### Information Persistence

Information relating to Participants and their Accounts must persist online transparent to the NxRS 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.

## User Audit Trail

The system shall maintain an audit log of all administrative user interactions with the system. Such an audit log will capture all important commands and interactions with the system by the user.

## Multiple Concurrent Users

The system shall support the capability for multiple concurrent users logging into the system without a significant degradation in system performance.

## 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.

## Browser Interface

The system should work with the current desktop browser versions of Internet Explorer, Chrome, Firefox, and Safari plus the last major version (the last 2 for IE). On Tablets, the front end should support both the Safari and Chrome browsers. On mobile (phone) devices, we recognize that some forms may require more space than is available. The new NxRS must have clear guidelines for both administrators and members on what will function on those devices and what will not.

## Adaptability

The system must be configurable to allow easy adaptation of the system, particularly for the following circumstances:

* Adding or changing events;
* Adding or changing users and user accounts;
* Adding or changing business rules;

# Appendix A – Membership Policies and Procedures

*{insert membership policy docs here}*

# 