DI Registration Administrator Guide

For the 2018-2019 DI Tournament Season

1.0 Introduction

There are five URLs used to access parts of the registration system. One URL is for the registration administrator, someone in the affiliate who will oversee the registration process and help teams and appraisers with registration problems. There are two URLs for team registration and two for appraiser registration. One of each pair is for entering a new team or appraiser registration and the other is for making updates after an initial registration is entered.

The URLs provided when using the system on the chuck.host-ed.me web site provide for secure (https) connections to the registration pages. If you install the software on your own web site, it is up to you to determine if this feature is available to you and provide the correct URLs to your users.

The flow of registrations begins by uploading the list of team numbers purchased by teams in the affiliate. This provides the system with the list of valid team numbers. Teams may register team numbers prior to this upload being performed, but will receive a warning until the number is uploaded. This upload also contains a list of those who purchased the numbers, the Membership Coordinators, along with their contact information including an e-mail address. The administrator can then contact the Membership Coordinators to let them know that there are numbers available for them to register. Status can be kept for each Membership Coordinator so the administrator can keep track of who has been contacted and what sort of reply was received, if any.

As part of the team registration, Team Managers can nominate Appraisers to meet any requirement that the affiliate may have for teams to supply volunteers for the tournament. The requirement for this can be customized by the administrator for the affiliate. Appraisers can then register in order to acknowledge that they are willing to serve, provide their contact information, and provide their job preferences. Team registrations are not considered complete until a team's nominated appraisers have registered, if teams are required to supply appraisers.

The administrator can track the status of all team and appraiser registrations and back up registration information off-line. There are backup files for each of the different databases associated with the registration program – Coordinator data, Team data, Team Member data, and Appraiser data. Other data is also available for download from the system. One file can be used for tournament scheduling. There is also a file of team e-mail addresses that can be extracted to be used to feed a separate e-mail list server. If Team Managers or Appraisers have difficulty saving registration data, the administrator can download a log of error messages that can help them provide assistance.

The link for administrators in the Team Registration module can also be given to Membership Coordinators to allow them to monitor the registration status of their teams. This can provide for local assistance for team and appraiser registrations.

2.0 The Registration System

The links for teams and appraisers to create and update registrations are fairly self-explanatory. There are help links all through the forms to explain what needs to be filled in. Confirmation e-mails are sent to the team manager or appraiser, when registrations are entered or updated. The text of these e-mails is logged and may be downloaded by the administrator to verify what was sent. There is also an option to copy the registration administrator on these e-mails.

This section will provide similar information for the administrative functions related to Registration Administration. Each administrator will be given an initial set of links to access the system and an administrative password. The User ID for the administrator is admin.

2.1 <u>Admin Set-Up Page</u>

The first time the administrator logs in, the Admin Set-Up page will be displayed. This page allows the administrator to customize the system for the affiliate. The following information may be customized:

- Affiliate Name
- Affiliate State
- Administrator Password
- Affiliate Web Site
- Registration Administrator's E-Mail address
- Whether to copy the admin E-Mail address on team and appraiser confirmation E-Mails
- E-Mail Configuration Settings (see details below)
- The list of jobs, by challenge or area, that are needed to be filled by appraisers
- The requirement for teams to supply appraisers - three options are currently available:
    - No appraiser requirement
    - One appraiser per team
    - One appraiser per team with a 2 appraiser minimum per membership group
- Whether or not Rising Stars teams must meet the above requirement
- Whether or not appraisers are given t-shirts to identify them at the tournament
- Whether or not team and/or appraiser registration is enabled

E-mail may be sent by the system using one of two methods – a sendmail program or by using SMTP to send e-mails by using an e-mail account of your choice. If you are using the program on the chuck.host-ed.me web site, the sendmail option is not available, as it would use an e-mail address to send the mail that is not consistent with your affiliate. For the most part, you should use an e-mail account that is consistent with the Registration Admin E-Mail you provided above. This is particularly important if anyone registers with a bad e-mail address, as the error message will be returned to the sending e-mail account. Whether you use sendmail or SMTP, you should check the account being used to send the e-mail for error messages regularly so that you can catch bad e-mail addresses quickly and contact a responsible team manager or coordinator to get it corrected.

If you choose sendmail to send your e-mail, you will need to provide the folder path where the sendmail program is available on your web site. You may also optionally provide the e-mail address of the account used by sendmail. The intent of this feature is to get by some spam filters in the case where the Registration Administrator's e-mail address has a different domain than the web site that the Registration System is hosted on. Some initial testing with different e-mail browsers has determined, however, that they do not all implement the feature that would direct e-mail replies back to the Registration Administrator's e-mail address, but some reply to the Registration Web Site E-Mail address. You may want to do some testing of your own to determine how this feature will work for you. If you leave this entry blank, the feature is disabled.

If you choose SMTP to send your e-mail, you will need to provide the E-mail host URL, port, the security type, your username and password for the account. These are similar to settings required to send e-mail through the account using an e-mail program on your computer other than webmail (e.g. Microsoft Outlook). In general, you can get this information from your e-mail host help files.

The admin set-up form also provides checkboxes that will enable or disable team and/or appraiser registration forms. It may be useful to disable registration during some maintenance operations on the registration system or after registration closes.

You may also choose to not use the e-mail features of the registration system. Choose "none" for the E-Mail Method and no e-mails will be sent. They will still appear in the archive that you may download (see the Coordinator List Page).

For any E-Mail Method, you may specify a Batch Limit. This prevents the system from exceeding your e-mail server's quota. If the administrator selects more e-mail to be sent in a single command than is allowed by the Batch Limit, the system will send that many e-mails and then hold the rest to be sent later. Held e-mails may be sent using the "Unsent E-Mail" button on the Summary Page. The administrator is also reminded of unsent e-mails when attempting to send more e-mail when held e-mails are available. It is up to the administrator to be sure enough time has passed before releasing held e-mails to avoid running afoul of their e-mail system's quota.

The Admin Set-Up page also allows the Team and Appraiser Registration help files to be customized. The help files used on the Team and Appraiser registration form are automatically customized according to the settings on this page. Alternatively, the administrator may upload custom help files. This needs to be done carefully, as there are bookmarks in the help file that are used by the system to display the portion of the help file that corresponds to a particular portion of the registration form. The easiest way to avoid a problem is to download the automatically generated help file and then replace only the text between the headers before uploading the custom file. If a custom help file is uploaded, a button will appear on the form to allow the administrator to revert to the automatic help file, if desired.

There is a “Test” button next to the Registration Admin E-Mail. Pressing this button will cause the system to send a test e-mail to that address to check that it is entered correctly.

Clicking on the “Save” button at the bottom of the page will save all updates and also update the help file(s) according to the changes on the form. Even if no changes need to be made, the “Save” button should be clicked one time to acknowledge that the information is correct so that future logins will skip this page. Clicking on the “Continue” button will cause the Summary screen to be displayed.

It is fully expected that as different affiliates try out this system that there will be requests for additional options to be added to this page to customize the various forms, the processing behind them, and the related help topics. If you have ideas for this, please send them along.

2.2 <u>Summary Page</u>

The Summary page will normally be displayed when the administrator logs in. The summary page displays the counts of team registrations by challenge and level. Two counts are displayed for each challenge / level. The second indicates the number that have registered in the registration system. The first number includes both teams that have registered and teams that have not registered but have selected a challenge and level on the DI Resources web site. Buttons are available to change the display to the Coordinator List page, Team List page, the Appraiser List page, Admin Set-Up page, or to log out of the system. If there are unsent e-mails that have been held do the E-Mail Batch Limit on the Admin Set-Up Page, the Unsent E-Mail button will be available. This button will take you to the E-Mail Status Page.

2.3 <u>Coordinator List Page</u>

The Coordinator List page lists all of the membership coordinators, their status and the name of the membership group. A checkbox is adjacent to each so that one or more coordinator can be selected for operations activated by the buttons at the bottom of the screen.

One of the first things needed is to upload a team number list. This list is available to Affiliate officials to be downloaded from the DI Resources web site (https://resources.destinationimagination.org/resources.php). To get the team number list, pull down the “Teams” menu and select “affiliate teams”. Use the “Export” button to create a .csv file on your computer.

To upload the team number file to the registration system, use the “Choose File” button on the Coordinator List page to select the file from the folder where it was downloaded on your computer and then click on the “Upload” button. The list of coordinators should then appear. You may need to perform this operation periodically through the registration period as new team numbers are purchased. Each time, you may upload the full list. The system will retain changes made for team numbers previously uploaded.

There are several ways to select coordinators for further operations. To select all coordinators, click on the “Select All” button. To select all coordinators with a given status, click on the radio button for that status, then click “Select Status”. The administrator can also just click on the individual check-boxes to select coordinators. The “Clear All” button will clear all selections made.

To set the status of one or more coordinators, select the checkboxes for the desired group of coordinators, select the radio button for the desired status, and click the “Set Status” button.

The “Send E-Mail” button will open the E-Mail Coordinator page to send e-mail to the selected coordinators. If there are previously unsent e-mails due to the E-Mail Batch Limit, the E-Mail Status Page will be opened first. If no held e-mails are sent from the E-Mail Status Page, the E-Mail Coordinator page will be opened.

The “Edit Coordinator” button will open the Edit Coordinator page for the first selected coordinator.

The “Download Backup” button downloads a backup of the current state of each coordinator in a .csv file. Periodic backups are a good idea in case of data loss. Saved backup files may be re-loaded into the system by selecting the file with the “Choose File” button and then by clicking on the “Restore Backup” button. Note that for a full backup restore it is necessary to upload the file of team numbers from the DI Resources web site prior to restoring the backup of coordinator data. It is a good idea for the administrator to perform periodic backups of data when it has changed to guard against data loss.

The E-Mail Archive function keeps a copy of each e-mail sent by the system in a daily log. There is a pull-down menu that allows each log to be selected. Once a log has been selected the “Download Archive” button will allow the log to be downloaded and viewed. The “Delete Archive” allows the log to be dropped from the pull-down menu. Note that the log for the current day cannot be deleted.

The “Download E-Mail List” button allows a list of e-mail addresses for coordinators and teams to be downloaded. If a file is selected via the “Choose File” button first, any e-mail addresses in the file will not be included in the download. This allows the administrator to look for new e-mail addresses that need to be added to another e-mail system.

The “Link” button combines the selected coordinators into a single membership group for purposes of satisfying appraiser requirements where the number of teams in a membership determines the number of required appraisers. This might be required if teams in a membership purchase their team numbers independently. The “Unlink” button will remove the link.

The “Summary” button takes the administrator back to the Summary page. The “Logout” button logs the administrator out of the system.

2.3.1 <u>E-mail Coordinator Page</u>

The E-mail Coordinator page will allow the administrator to send e-mail to all coordinators that were selected on the Coordinator List page. When e-mail is sent to multiple coordinators, each one will receive an individual e-mail rather than a single e-mail being sent to a large distribution list that might run afoul of a spam filter. The e-mail form allows the following additional options to be selected:

- Send to new coordinators – Send the e-mail only to coordinators with their status set to “New”.
- Send if no reply received – Send the e-mail only to coordinators with their status not set to “Reply Received” or “Dropped”.
- Send if no teams registered – Send the e-mail only to coordinators who have no team numbers that have registered for the tournament.
- Send User-ID and Password – Include the login information for the coordinator in the body of the e-mail. Coordinators may use this login from the URL for the registration administrator to view the status of their team registrations. Be sure to include this URL in the body of the e-mail.

Enter the e-mail subject and text and hit the “Submit” button to send the e-mail. The “Cancel” button will re-open the Coordinator List page.

While lists of e-mails are being sent, a status page is displayed that indicates how many e-mails have been sent. This page is refreshed about every 30 seconds.

2.3.2 Edit Coordinator Page

The Edit Coordinator page displays the details of a coordinator. The coordinator’s name, address, e-mail address, and phone number can be viewed and/or changed. The coordinator’s status is displayed and can be changed. A list of the team numbers is shown. The team numbers that have been registered are buttons that can be clicked to open the Team Registration page. The team’s name, manager, program (DI or RS), Region, number of required appraisers, number of registered primary appraisers and number of registered alternate appraisers are also displayed for each team.

If any attempt has been made to register a team, a button will be displayed to download the activity log for the team. The activity log will contain error messages that prevented the team registration from being saved. This can be used by the administrator to help team managers who are having problems completing their registration forms.

If the membership is linked to another (see the “Link” button above), the linked membership coordinators are also displayed.

Click on the “Save” button to save changes. Click on the “Coordinator List” button to return to the Coordinator List page. Click on the “Logout” button to log out of the system.

2.4 Team List Page

The Team List page lists all of the registered team numbers, their team name, their manager’s name, their level and their challenge. A checkbox is adjacent to each so that one or more team can be selected for operations activated by the buttons at the bottom of the screen.

There are several ways to select teams for further operations. To select all teams, click on the “Select All” button. A team number (last 5 digits) can be typed in the entry box at the bottom of the page and then click on the “Select” button. The administrator can also just click on the individual check-boxes to select coordinators. The “Clear All” button will clear all selections made.

The “Send E-Mail” button will open the E-mail Team page. If there are previously unsent e-mails due to the E-Mail Batch Limit, the E-Mail Status Page will be opened first. If no held e-mails are sent from the E-Mail Status Page, the E-Mail Team page will be opened.

The “Edit Team” button will open the Team Registration page.

The “Delete” button deletes the registrations of the selected team or teams.

The “Download Backup” button downloads a backup of the selected data into a .csv file. Either the Team or Team Member databases can be backed up. Selecting Schedule Data downloads a combination of Team and Coordinator data that is useful for tournament scheduling. Periodic backups of the Team and Team Member data are a good idea in case of data loss. Saved backup files may be re-loaded into the system by selecting the file with the “Choose File” button and then by clicking on the “Restore Backup” button. The Schedule data may not be restored, as it is only useful for scheduling at the end of registration.

The “Error Summary” button displays a summary of the registration form warnings from all teams that have them.

The “Download Log” button displays any error messages related to saving team data for the selected teams. This can be used to aid Team Managers who are having trouble getting registration data saved.

The “Summary” button takes the administrator back to the Summary Page.

The “Logout” button logs out of the application.

2.4.1 E-mail Team Page

The E-mail Team page will allow the administrator to send e-mail to all teams that were selected per the above process. When e-mail is sent to multiple teams, each one will receive an individual e-mail rather than a single e-mail being sent to a large distribution list that might run afoul of a spam filter. The e-mail form allows the following options:

- Send Team Data – Include a confirmation of the team’s registration data in the body of the e-mail.
- Send Warnings – Include any registration warnings in the body of the e-mail.
- Send Only If Warnings – Only send the e-mail to a selected team if the team has warnings. This is useful to filter a longer distribution list.
- Send Password – Include the team’s registration password in the body of the e-mail.
- Include MC E-Mail Addresses – In addition to the Team Manager(s), send the e-mail to the Membership Coordinator.
- Include Alternate E-Mail Addresses – In addition to the Team Manager(s), send the e-mail to the addresses listed on the registration form under “Alternate E-Mail Addresses”.
- Send to Unregistered Appraisers – Send the e-mail only to appraisers on the team’s registration form who have not yet registered as appraisers.

Blanks are provided for the e-mail subject and the text of the message to send. If Warnings, Password, or registration confirmation are sent, they will be appended to the message that you provide in the text box.

Clicking on the “Submit” button will cause the e-mail to be sent. Clicking on the “Cancel” button will cancel the e-mail and return to the Team List page or Team Registration page, depending on how the E-Mail Team page was invoked.

While lists of e-mails are being sent, a status page is displayed that indicates how many e-mails have been sent. This page is refreshed about every 30 seconds.

2.4.2 <u>Team Registration Page</u>

The Team Registration page is the same form that is presented to a team when they register. This allows the Registration Administrator, or the team’s coordinator to view and make changes as needed to assist a team in their registration. Help links on the page provide assistance for individual data entries. The Registration Administrator has one additional button on the form not available to others. The “E-Mail” button will open the E-mail Team page. The “Logout” button will return the Registration Administrator to the Team List page or will return a coordinator to their Edit Coordinator page. The “Save” and “Submit” buttons work the same way as when teams use this form to register.

2.5 <u>Appraiser List Page</u>

The Appraiser List page lists all of the appraiser’s names, their team number and their status (Primary or Alternate). A checkbox is adjacent to each so that one or more appraiser can be selected for operations activated by the buttons at the bottom of the screen.

There are several ways to select appraisers for further operations. To select all appraisers, click on the “Select All” button. The administrator can also just click on the individual check-boxes to select coordinators. The “Clear All” button will clear all selections made.

The “Send E-Mail” button will open the E-mail Appraiser page. If there are previously unsent e-mails due to the E-Mail Batch Limit, the E-Mail Status Page will be opened first. If no held e-mails are sent from the E-Mail Status Page, the E-Mail Appraiser page will be opened.

The “Edit Appraiser” button will open the Appraiser Registration form that appraisers will see when they register.

The “Download Backup” button downloads a backup of the current state of each appraiser in a .csv file. Periodic backups are a good idea in case of data loss. Saved backup files may be re-loaded into the system by selecting the file with the “Choose File” button and then by clicking on the “Restore Backup” button. The appraiser backup file contains all data that would be required to assign appraisers to the required jobs at a tournament.

The “Error Summary” button displays a summary of the registration form warnings from all appraisers that have them.

The “T-Shirt List” button downloads a summary of t-shirt size selections. This button will only appear if “T-Shirt Provided to Appraisers” is selected in the Admin Set-Up.

The “Delete” button deletes the registrations of the selected appraiser or appraisers.

The “Download Log” button displays any error messages related to saving appraiser data for the selected appraisers. This can be used to aid appraisers who are having trouble getting registration data saved.

The “Summary” button takes the administrator back to the Summary Page.

The “Logout” button logs out of the application.

2.5.1 E-mail Appraiser Page

The E-mail Appraiser page will allow the administrator to send e-mail to all appraisers that were selected per the above process. When e-mail is sent to multiple appraisers, each one will receive an individual e-mail rather than a single e-mail being sent to a large distribution list that might run afoul of a spam filter. The e-mail form allows the following options to be selected:

- Send Appraiser Data - Include a confirmation of the appraiser’s registration data in the body of the e-mail.
- Send Warnings – Include any registration warnings in the body of the e-mail.
- Send Only If Warnings – Only send the e-mail if the team has warnings.
- Send Password – Include the team’s registration password in the body of the e-mail.

Blanks are provided for the e-mail subject and the text of the message to send. If Warnings, Password, or registration confirmation are sent, they will be appended to the message that you provide in the text box.

Clicking on the “Submit” button will cause the e-mail to be sent. Clicking on the “Cancel” button will cancel the e-mail and return to the Appraiser List page or Appraiser Registration page, depending on how the E-Mail Appraiser page was invoked.

While lists of e-mails are being sent, a status page is displayed that indicates how many e-mails have been sent. This page is refreshed about every 30 seconds.

2.5.2 Appraiser Registration Page

The Appraiser Registration page is the same form that is presented to an appraiser when they register. This allows the Registration Administrator to view and make changes as needed to assist an appraiser in their registration. Help links on the page provide assistance for individual data entries. The Registration Administrator has one additional button on the form not available to others. The “E-Mail” button will open the E-mail Team page. The "Logout" button will return the Registration Administrator to the Appraiser List page. The "Save" and "Submit" buttons work the same way as when appraisers use this form to register.

2.6 E-Mail Status Page

The E-Mail Status page shows a list of e-mail topics that weren't completely sent due to the E-Mail Batch Limit. The time, subject and count of each set of messages is displayed. The administrator may then select to Hold, Send or Delete each one. The "Cancel" button returns back to the previous page without performing any actions. The "Go" button performs the actions selected in the Disposition column for each message set.