

EVENT MANAGEMENT SYSTEM (EMS) User Manual

Part 1 – Registration

Part 2 – Arrivals & Departures

Part 3 - Accommodation



PART 1 - BASIC GUIDE FOR THE EMS REGISTRATION MODULE

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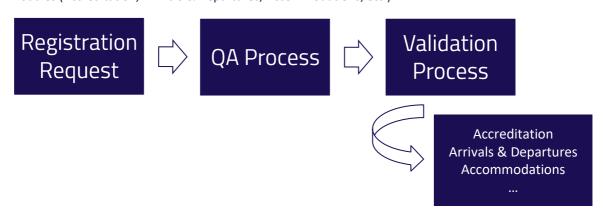
GLOBAL BUSINESS SCOPE

The Registration module allows you to register participants for a specific event. Any participant in an event must first be registered in the system before being able to carry out any other action in the system. It means that each participant in the event must be registered to be accredited, for example, or to have access or be available in any other module of the system.

This guide explains how to navigate through the Registration module within the Event Management System (EMS) for the European Championships Munich 2022 (EC2022).

MAIN STEPS

- 1. **Registration Request**: Someone requests to be registered for the event. Fill in the data and send the information. The Registration process can be done manually (single registration) or in bulk.
- 2. **Quality Process**: for specific groups, data quality will be checked by a member of the Quality Assurance team (QA).
- 3. **Validation Process**: The Group Owner will be responsible for the last validation and acceptance of these registration requests → If accepted these registrations will be available on other system modules (Accreditation, Arrivals & Departures, Accommodations, etc.)

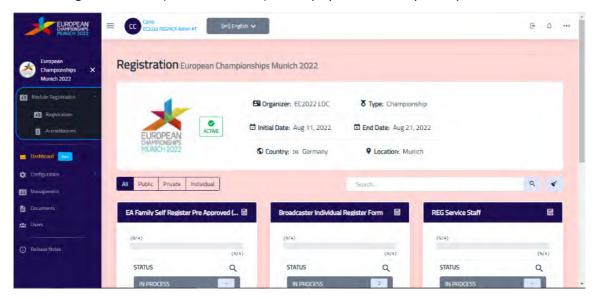




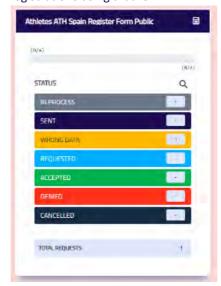
MODULE STRUCTURE

DASHBOARD

The first page that the user will see when accessing the module will be the dashboard. Here the user can see the different registration cards (one for each form) that displays the status of your requests.



Click on the magnifying glass to access all registrations using that form.

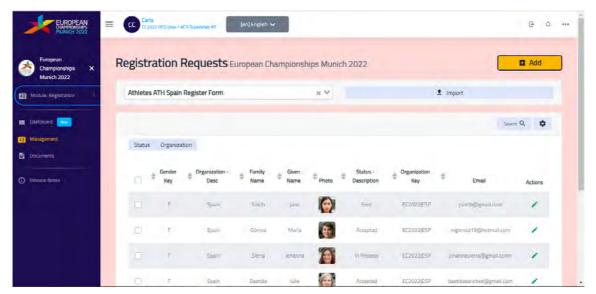


If you click on a status line (as a shortcut), you will be redirected to the registration requests page for that form in that stage of approval.

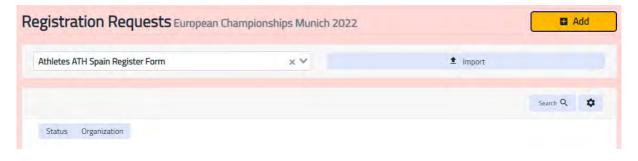


MANAGEMENT

On the menu bar on the left-hand side, click "Management" to access the registration requests made through the registration forms.

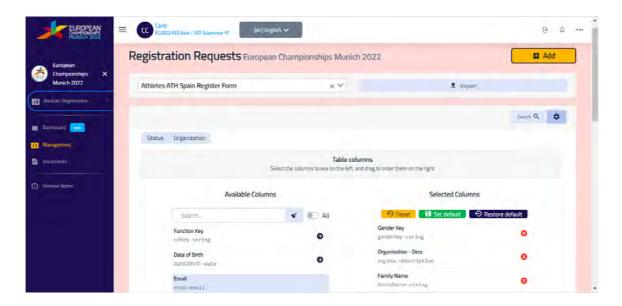


Within this section, you'll have the following functionalities:



- Search button Search Q allows you to search in each column of the table.
- Use the dropdown menus to filter by Status and Organization
- Settings Button allows you to change the table columns. All Available Columns are on left side. You can select columns on the left (then click on the arrow of selected item). This will move them to right side which lists what you will see in the table view "Selected Columns".
- In Selected Columns, you can customize the order of your data table view. To configure it drag and drop the fields to the desired position.

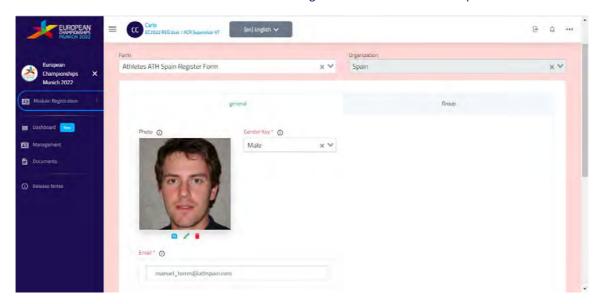




According on the type of user you may have the option to download . This option allows you to download data with selected info in formats (i.e., xls, PDF).

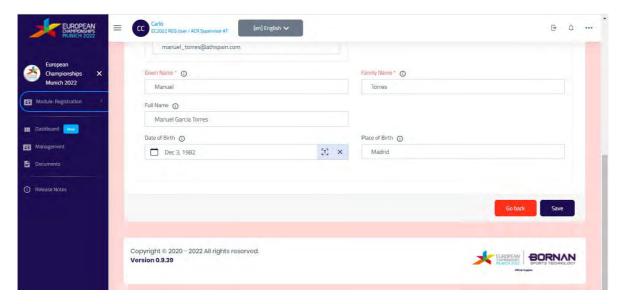
ADD A NEW REGISTRATION REQUEST (SINGLE REGISTRATION)

- 1. To make a new request click on "Add" button
- 2. Select or check that the Form and Organization selected on the top fields are correct.

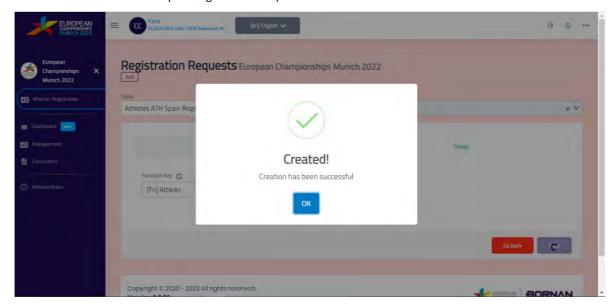




- 3. Fill in all data in the different tabs. Mandatory data fields are formatted in red with "*" symbol).
- 4. Click "Save" button.



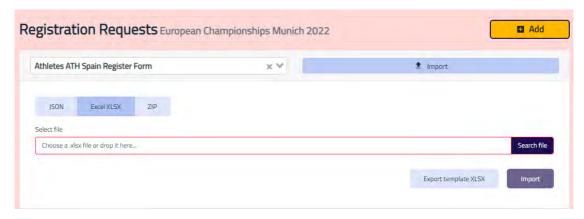
5. Click "OK" your registration request has been created.



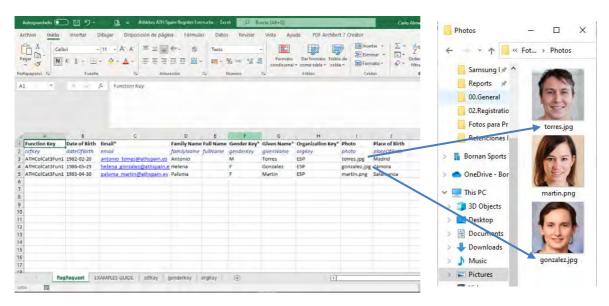
IMPORTING OF MULTIPLE REGISTRATIONS (BULK REGISTRATION)



1. From the Management menu it is also possible to import data as an Excel file (xlsx), JSON or ZIP format, using the "Import button"

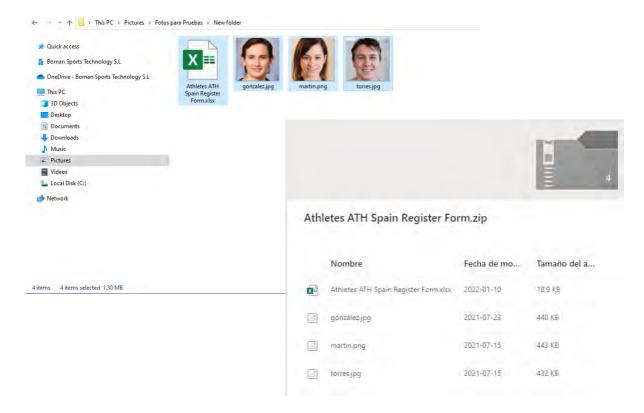


- 2. First click on the "Export template XLSX" button which allows you to export a template.
- 3. Fill the data in "RegRequest" tab. The fields with an asterisk are required fields. To see formats for required fields there will also be an example guide Excel tab below.
- 4. To upload Excel file with photos, you need to fill in the photo column with the same name as the photo's png or jpg file.

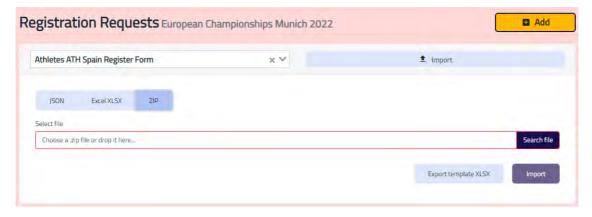


5. Add the Excel file and the photo files in a ZIP file (image below).



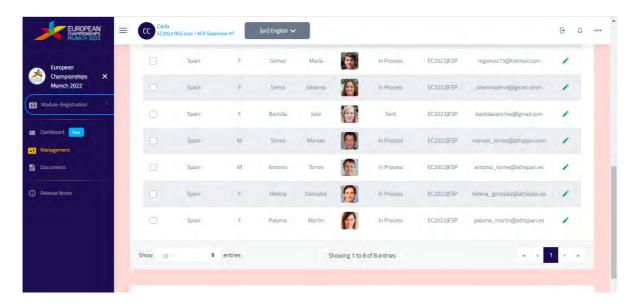


6. Choose ZIP option file and then click "Import" button.

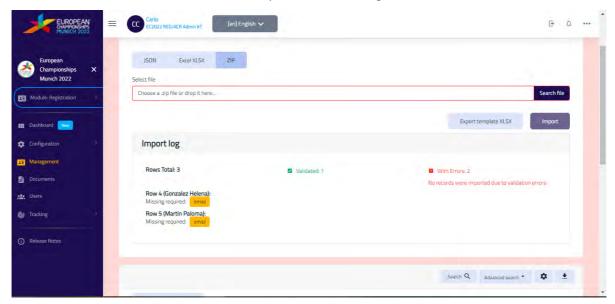


7. When entries have been imported correctly, you will see the entries with your photos included.





8. When you import the file and some required field is missing, an Import log will appear indicating in which row with errors and which required field is missing.



OPTION: FORWARD REQUEST

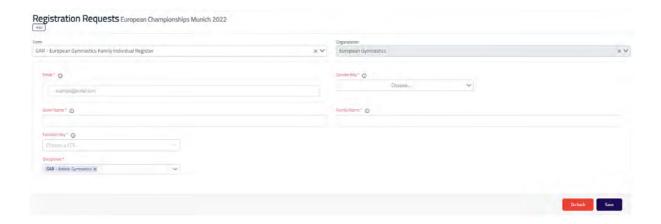
Depending on the type of user, e.g., if you are a European Federation Family SPOC you will be able to "forward a request". This means that you can create an account only with basic information for a person who is then able to enter the system and register/complete any other information by itself.

1. In Management menu, in Registration Requests there will be another button:

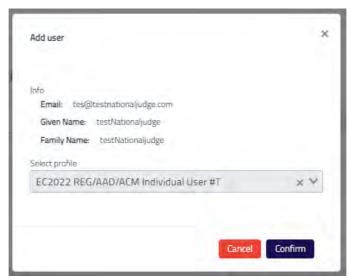


2. Fill the basic fields in the form that appears and click "save"





- 3. The person that you have just added will appear in the requests list.
- 4. By clicking the green button ^{**} on the right, the following pop-up will appear



5. Click "confirm" and this person will receive an email that an account has been created for them, they can set a password and enter the system.

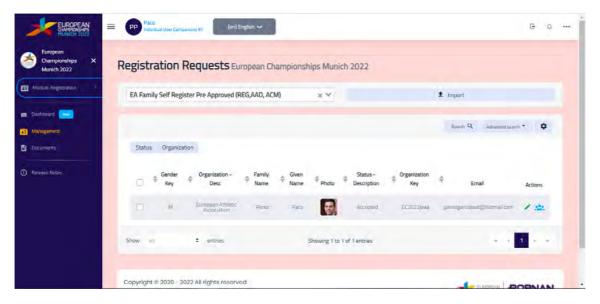
OPTION: MANAGEMENT OF COMPANIONS

Depending on the type of user, in the Management menu, there will be the possibility of managing companions from a registrant that already exists.

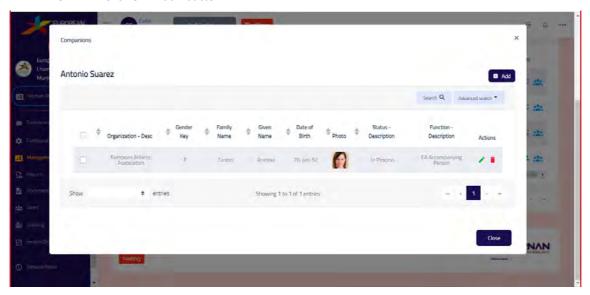
1. In Management menu, in Registration Requests choose the form (if needed)



2. Click on "Manage Companions" button

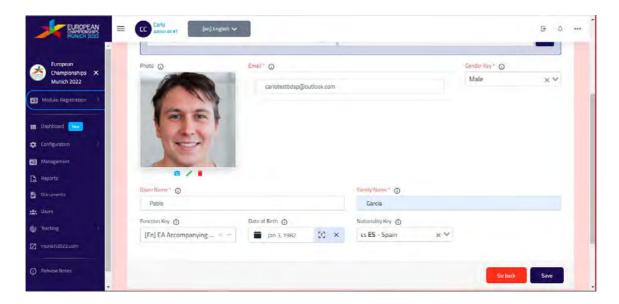


3. Click on "Add" button

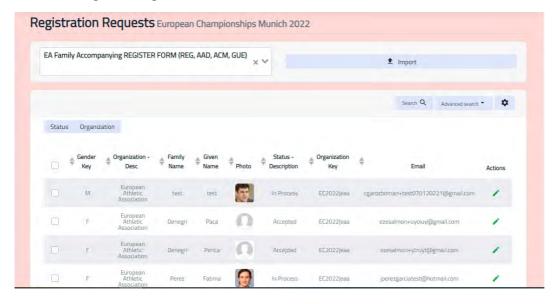


- 1. Fill in the data of the companion.
- 2. Click on "Save" button.





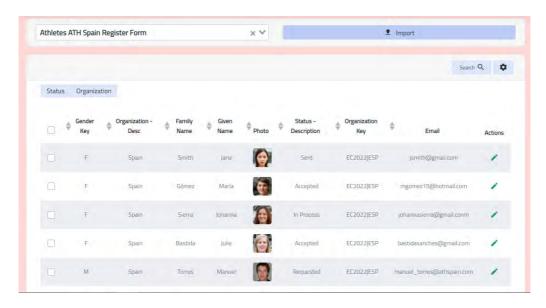
3. From that moment, the people who are companions will appear in a form where they can be managed as a registrant as well.



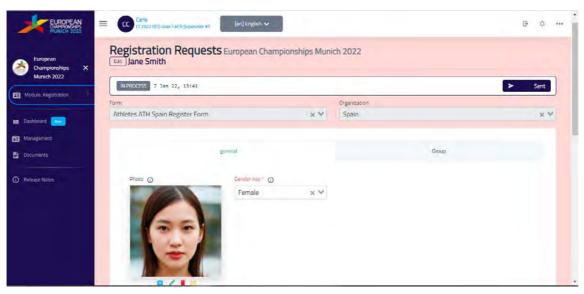


FINALIZING THE REQUEST

4. In the Management menu, according to your registration profile you can Edit and Remove registration requests in the Actions column



- 5. Depending on the assigned profile, you may be allowed to change certain statuses in the Registration flow.
- 6. When a registration is created, the initial status is IN PROCESS. **Click on SUBMIT button to confirm the request** (You will need to fill of mandatory fields before to be able to change status to SUBMIT).

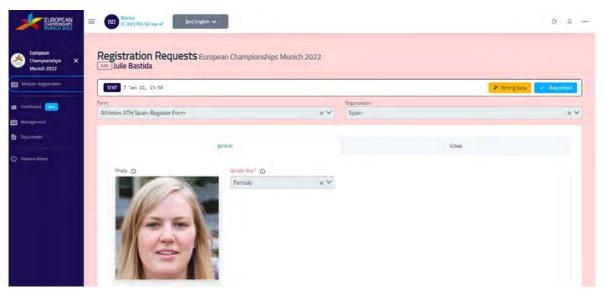




DIFFERENT USER PROFILES WITHIN THIS MODULE

QA User:

For some specific groups, this profile will check and approve the data. The status will change to REQUESTED. If there are missing or wrong data in the request, click the WRONG DATA button, and the data will be reviewed by the REG User.

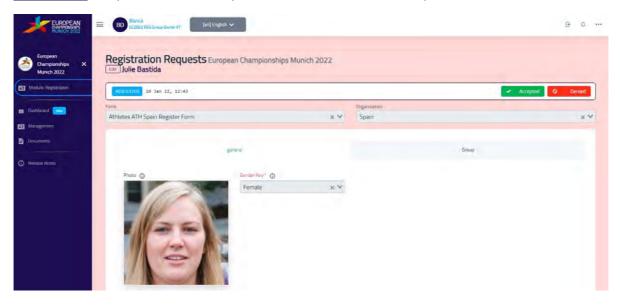


You can add observations and send an email to the registrant.

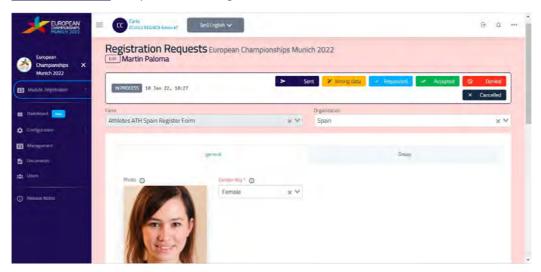




<u>Group Owner</u>: this profile will be the responsible to ACCEPT or DENY the requests.



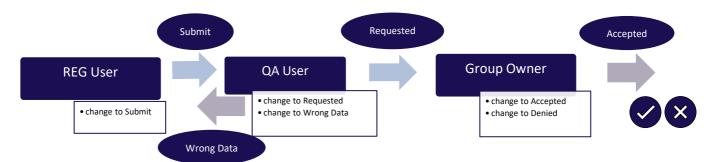
REG Admin Profile: this profile can change all the status.





REGISTRATION PROCESS SUMMARY

PLEASE NOTE: Only these requests for registrations that have the status of <u>ACCEPTED</u> will be part of the event and will be available in the rest of the system modules.

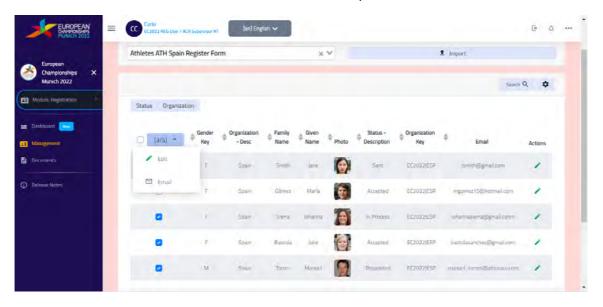


REG User change to Submit \leftrightarrow QA User change to Requested \leftrightarrow Group Owner change to Accepted REG User change to Submit \leftrightarrow QA User change to Wrong Data \leftrightarrow Go back to REG User REG USER change to Submit \leftrightarrow QA User change to Requested \rightarrow Group Owner change to Denied

ADMIN FEATURES

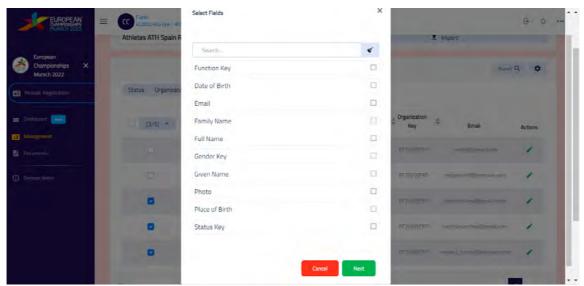
Edit fields in bulk:

1. You can select entries and edit all or the ones you want to edit. Click "Edit" button.

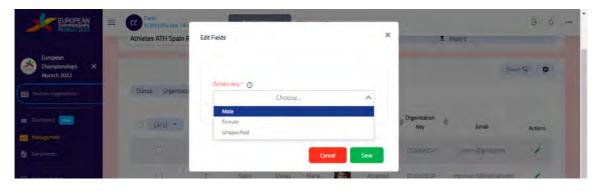


2. Select the field you want to edit.





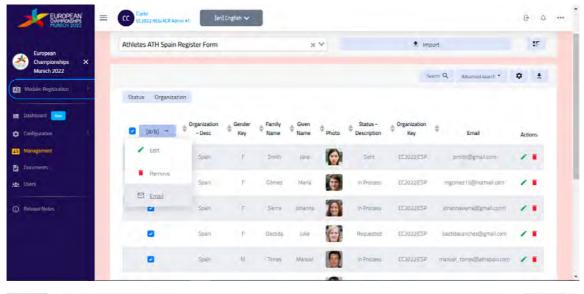
- 3. Click "Next".
- 4. Fill the data and click "Save".





<u>Send emails in bulk</u>: according to the assigned profile you may have the option of sending mass emails. Emails may also be sent to individual registrants.

- 1. You can select the entries and send email to all or the individuals you select. Click "Email" button.
- 2. The "New Email window" opens.
- 3. Fill in the data and click "Send"

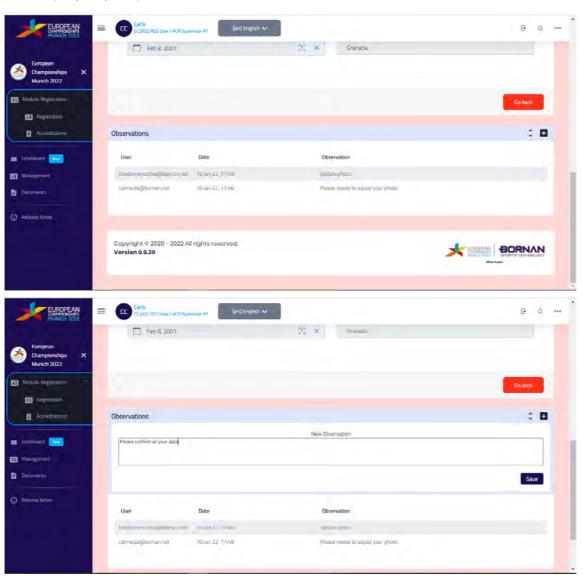






Add observations to a registration request:

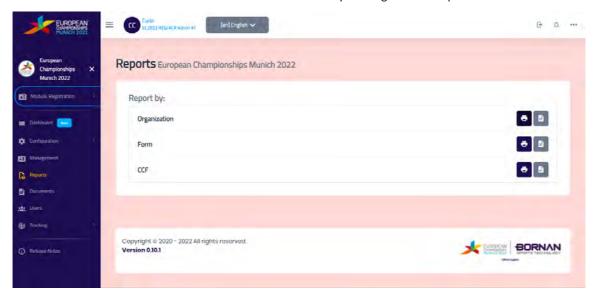
- 1. In Registrations Requests menu click on "Edit" button in the Actions column.
- 2. Click on button in observations field bellow.
- 3. Add a new observation.
- 4. Click "Save"
- 5. Any user with access to Registration will be able to see those comments from that registration (they are public).





REPORTS

- 1. Select "Reports" on the left-hand side. In this menu, you will be able to download and print request reports by Organization, Form and CCF (collectives, categories, functions)
- 2. Print document by clicking on the "Printer icon"
- 3. Download document as a PDF-document by clicking on the "Paper icon"



DOCUMENTS

This option of the menu will show any general document such as user guides, terms, and conditions, etc shared by the organising committee. Please note that this repository may be empty and that these documents will not be restricted to any user.



CONTACT

If you have questions or need help from the LOC, don't hesitate to contact us:

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PART 2 - BASIC GUIDE FOR THE EMS ARRIVALS AND DEPARTURES MODULE

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GLOBAL BUSINESS SCOPE

The Arrivals and Departures module will be used as the main tool for managing the travelling information of the expected participants joining the event. With this information, EC2022 will manage the transportation from the point of arrival to the respective accommodations and back again for the departures from the host city.

Information regarding travel dates, transport modes and travel codes (flight number, train number), baggage, special needs, etc, will be registered within the system. Only transfers for those participants that have booked their hotel through EC2022 will be entitled to this transportation service.

This guide intends to explain how you navigate through the Arrivals and Departures module within the Event Management System (EMS) for the European Championships Munich 2022.

MAIN STEPS

- 1. Access the Arrivals and Departures module
- 2. Create an entry for the selected people with information on the Arrival or Departure (date and time, type of transport and id, transfer needed, etc).
- 3. Modify any of the entries.

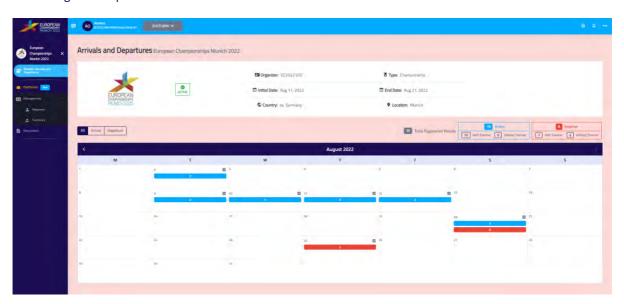


MODULE STRUCTURE

DASHBOARD

The first page that the user will see when accessing the module will be the dashboard. Here, the user will be able to see a calendar with the number of Arrivals and Departures registered for each day (Arrivals will be displayed

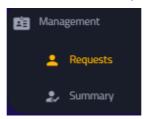
in blue and Departures will be displayed in red). By clicking the icon, a list of the people arriving or departing on the selected day will be displayed. Additionally, more information regarding these entries will be available in the management option in the menu on the left.





MANAGEMENT

The management option from the menu will be divided into two options:

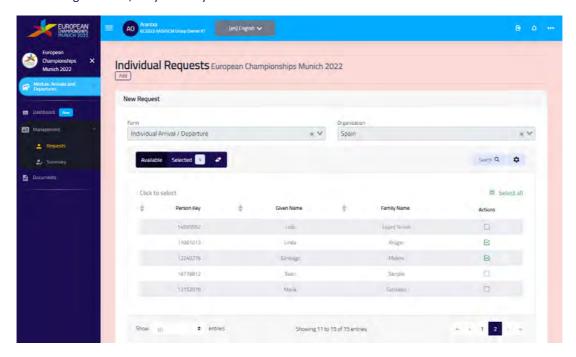


REQUESTS

This option will allow the user to manage the Arrivals and Departures requests: creation and modification To create a new entry for an Arrival or a Departure for any participant:

- 1. Inside the Arrivals and Departures Module → Go to Management → Requests option
- 2. Click "Add"
- 3. Select the participants from the list for who you want to add the arrival or departure information by $\frac{\text{Actions}}{\text{Actions}}$

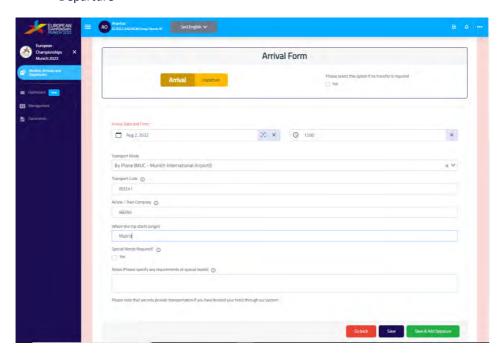
marking the actions checkboxes (individual or multiple selection allowed). Only participants whose registration has been accepted will be shown within this list. If the user is not a Responsible Organization, they will only be able to add information related to themself.



- 4. The user will select between Arrival/Departure depending on what type of information they want to
- 5. If the user doesn't want to be transferred by the LOC they will have the option to resign by checking the checkbox to the right

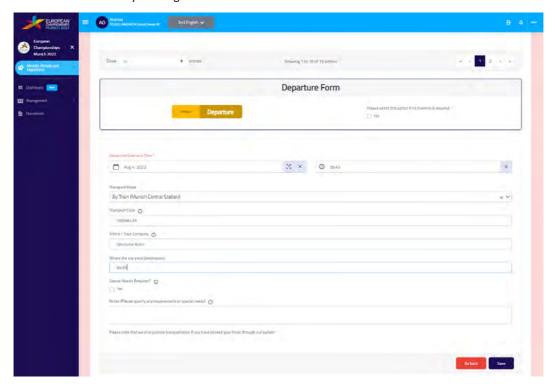


6. When the user completes the information related to an Arrival, they will be able to save the information and add the information related to the departure directly by clicking on "Save & Add Departure"



7. Once the user completes the information related to a departure, they will be able to save the information by clicking

Save

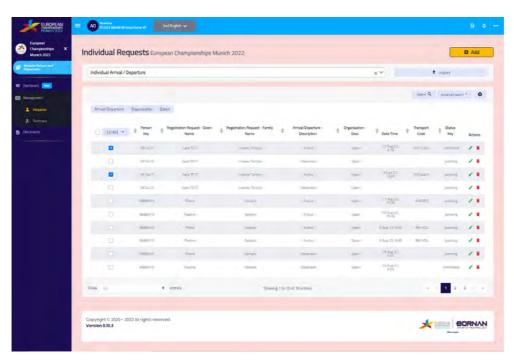




To modify an entry for an Arrival or a Departure:

Please note that all Arrivals & Departures requests must be confirmed by the LOC. This is especially to be kept in mind for late changes - only for requests that have been confirmed, transportation can be provided.

1. Select the entry from the list of requests.



- 2. Click on the edit icon of the Arrival or Departure to be modified.
- 3. The screen with the registered Arrival or Departure form will be displayed and the information may be changed and saved
- 4. Please note that the modification of an Arrival and a Departure must be done separately. If the toggle button is changed from Arrival to Departure when editing an entry, that means that that Arrival is now considered a Departure.





To create new entries for Arrivals and Departures in bulk (file importation):

- 1. Click on the tab "Import"
- 2. An extended menu will be showing different options for the importation.



- 3. Choose the file format to be uploaded: json, .xlsx or .zip.
- 4. For importing an .xlsx format the template must first be downloaded by clicking on Export template XLSX
- 5. Fill the excel file by following the examples given. Please make sure to use the correct keys.
- 6. Once the file is correctly filled, this file can be uploaded from the computer to the system by clicking

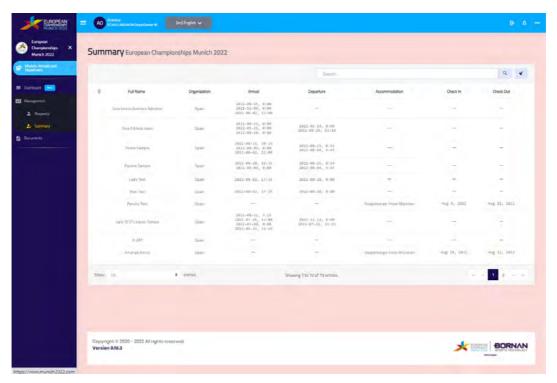
 Search file and Import
- 7. An import log will be displayed with information on the success of imported rows. Information on the errors given will be shown in case the importation fails.





SUMMARY

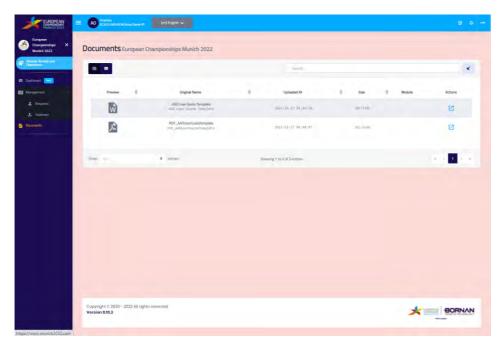
Within this option from the menu, an abstract on the reservations for each participant can be seen.





DOCUMENTS

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CONTACT

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PART 3 - BASIC GUIDE FOR THE EMS ACCOMMODATION MODULE

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GLOBAL BUSINESS SCOPE

The Accommodation module will be used as the main tool for managing the hosting reservations for the participants joining an event. Information on accommodations, and their availability and restrictions will be registered within the system.

This guide intends to explain how you navigate through Accommodation module within the Event Management System (EMS) for the European Championships Munich 2022.

MAIN STEPS

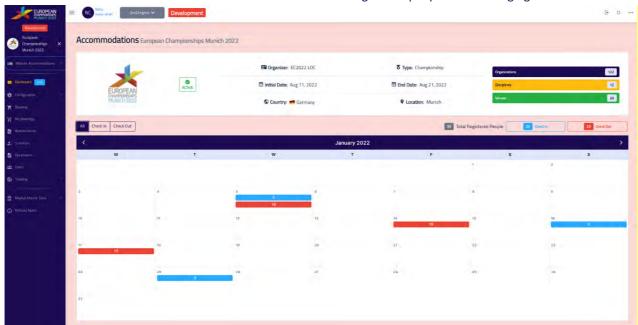
- 1. Access the Accommodation Module
- 2. First Phase → Generation of a reservation for a certain hotel and dates.
- 3. Confirmation of the reservation and checkout process through a payment gateway or bank money transfer
- 4. Reception of confirmation to the user of its reservation (email with confirmation and invoice).
- 5. Once the reservation is confirmed, participants (only those previously accepted in the registration module) can be assigned to the different rooms.
- 6. Modification and cancellation of bookings will also be available during this initial phase.
- 7. <u>Second Phase</u> → No new bookings are allowed. Only modification or cancellations of previous reservations are allowed. EC2022 will be responsible to approve or reject such requests. Assignation of participants to reservations is still allowed
- 8. <u>Third Phase</u> → Any request must be done through a text field within the system, and the administrator will be responsible for handling those requests.



MODULE STRUCTURE

DASHBOARD

The first page that the user will see when accessing the module will be the dashboard. Here the user will be able to see in a calendar all the check-in and check-out dates for the registered people he is managing.





BOOKING

Within the "Booking" option from the menu, the user can make reservations on the available hotels for certain dates.

The ability to make reservations, modifications and cancellations will depend on the phase of accommodation (explained throughout this guide). New bookings can only be done in the <u>First Phase</u> of the process.

To create a new reservation:

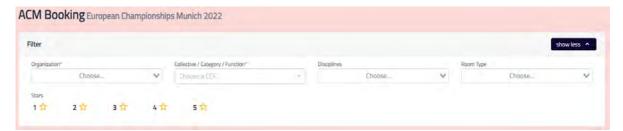
1. Inside the Accommodation Module → Go to the Booking option from the menu → The available hotels will appear according to the filters applied.

If you are an individual user making a reservation for yourself (or yourself and accompanying people), some of these filters will be preselected on your behalf.

Otherwise, if you are a Responsible Organization managing different people and functions, you will need to apply the filters according to the booking you want to do.

IMPORTANT NOTE: If you do not select the correct Collective / Category / Function (CCF) in this step, you will not be able to assign Guests to these rooms at a later step. Only people who belong to the CCF (mandatory field within registration) can be assigned to the respective room.

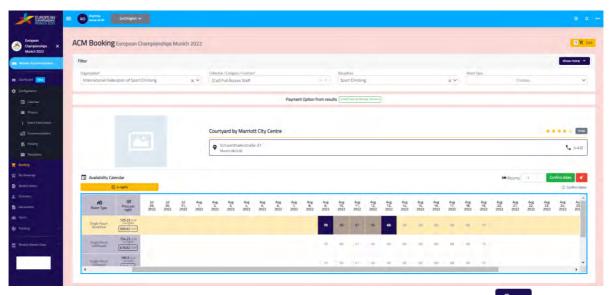
These filters will be applied by selecting Organization, CCF (Collective, category and function) and discipline for the reservation from the combo fields on the top of the page. Room type and category can also be filtered:





2. Available hotels will appear → Press select dates

→ to select the desired nights from the available dates within the selected hotel and click confirm dates



3. Check that the Booking details in the pop-up window are correct and click save

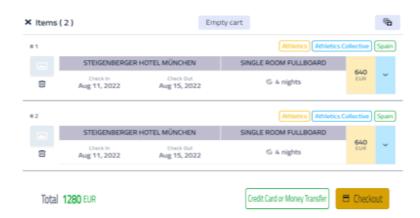


- 4. The new reservation will now be added to your Cart. If you are a Responsible Organization, you may repeat this process as many times as you want to add more rooms before doing the checkout process. If you are an individual user, you will be limited to 3.
- 5. For reviewing the information on the reservations made click the Cart button on the top right of the screen.



6. Check the items in your cart. These rooms will be blocked within the platform but will not be confirmed until the checkout process has been completed. To do so, click on Checkout button

Checkout



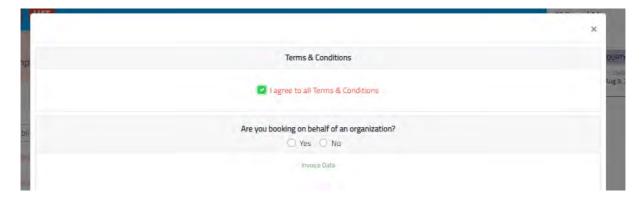
Please be aware that the items in you cart will erased after 1 hour if the checkout process won't be completed.

7. A pop up will appear with a message and a text-area to add information. This is for teams of Para-Rowing and Para-Canoe to be able to specify special requirements in their bookings.

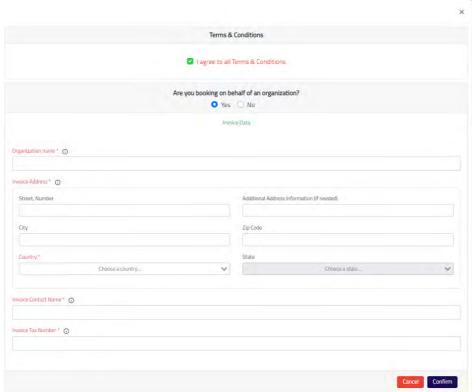




8. If your user is configured as non-payer, you will see a summary of the items that you have selected and will need to confirm it to finalise the process. If this is not your case, you will first see a pop-up with terms and conditions (which the user needs to agree to proceed).



9. On the same pop-up window, the user will have to provide their own financial information for invoicing purposes. To do this they will have to select if they are purchasing on behalf of an organization or for themself.



10. Once this information is confirmed, the user will be able to select the payment method they prefer Credit Card or bank transfer. Below, they will see a summary of the items to be purchased with the total amount to be paid (VAT Included).





- 11. If bank transfer is selected, information regarding the transfer will be shown. Please note this information as it is very important to complete the process.
- 12. In case credit card is selected the system will redirect the user to the payment gateway where they will need to complete their credit card information.
- 13. When confirmed, an email with the invoice information will be sent to the user.



Thank you for completing your accommodation request.

Attached you can find the invoice and the payment details. You are kindly requested to proceed with the deposit payment within five (5) working days but not later than 01 May 2022 to guarantee the hotel booking. Your booking request will be confirmed after we received the full payment on the respective bank account.

Please be aware of your respective payment and cancellation deadlines and conditions. You can find them in your EMS profile under "documents".

We are looking forward to welcoming you in August!



MY BOOKINGS

In this option a list of the reservations made within the system will be displayed. Each line will represent a reservation in which multiple information is be shown trough the different columns. The status and summary of the purchase can be viewed () and the invoice downloaded () by clicking the icons.



DETAILS

By pressing the details icon a new screen will be opened with information regarding the general status of the booking (pending, requested, confirmed, rejected) and its financial status together with an abstract of the items and prices of the reservation.





INVOICE

By pressing the invoice icon , a new browser window will be opened containing the pdf file of the invoice. This pdf invoice is the same sent when completing the checkout process.



CANCELLATION/ MODIFICATION

During the <u>First Phase</u> of the booking process, the user will be able to cancel or modify any of the bookings done.

To do this the user will need to click the cancellation button $^{\bigcirc}$ or the modification button $^{\prime}$ of the purchase they want to change. These actions, when executed can't be undone.

The cancellation will change the status of the booking to "Cancelled" and the rooms will be returned to the hotel available rooms.

The modification process will change the status of the booking to cancelled and will add at the same time all the items from the cancelled booking to the cart. From here, the user will be free to add or remove any of the previous bookings. To finish the request, the user will have to follow a simplified checkout process.

0 %	0€	14635.52€	Confirmed	Money Transfer - Pending	16-Dec-21, 11:31	/ O O A
0 %	0 €	1224.56€	Confirmed	Money Transfer - Pending	16-Dec-21, 10:46	/ ○ ● □

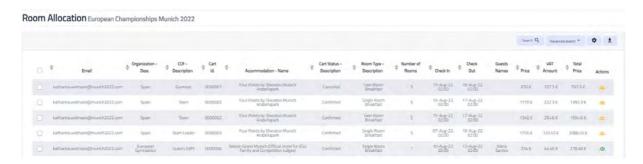


During the <u>Second Phase</u>, cancellations and modifications can be requested but will need the final validation from the LOC. This will be reflected in the platform with the status: "Cancellation Request" and "Modification Request". When approved or rejected by the LOC the status will be: "Cancellation/Modification Rejected" or "Cancellation/Modification Approved". In this phase, availability of hotels will not be considered when requesting a modification.

In the Third Phase, only change requests via a text form in the booking element will be allowed.

ROOM ALLOCATION

The list of the booked items (rooms) is shown in this view. Here, previously registered participants (through the registration process) can be assigned to the different rooms and hotels.

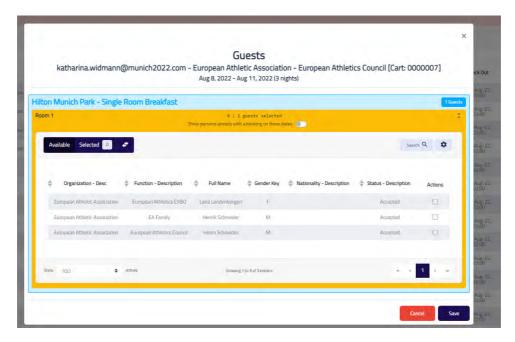


To add a participant to a room:

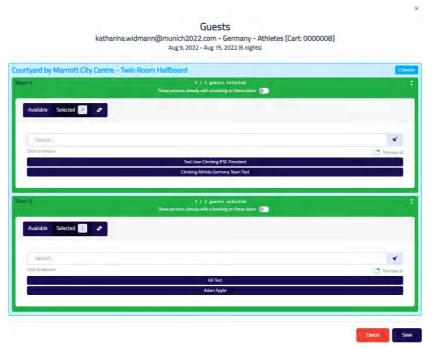
1. Click the icon of the row of a room to which you want to assign a guest.



2. A pop-up window will appear, click the icon to display a list of possible participants that can be added to the room.



3. Select the participant(s) by checking on the box at the end of the row and click Save . Depending on the type of room selected you will be able to add or remove participants (single room, twin room, etc).



By default, people already assigned to other rooms will not be displayed. If you wish to overwrite this,

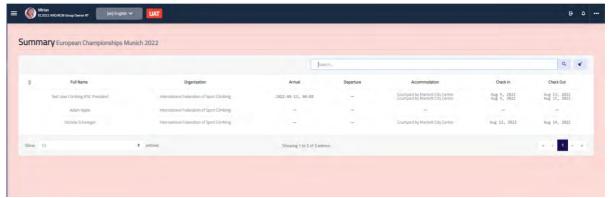


- 4. If in a room, the maximum number of participants hasn't been reached, its border will be yellow. When the capacity is reached, the border will change to green.
- 5. Similarly, the icon of the row of the bookings list will change from yellow to green when all rooms have reached their capacity.



SUMMARY

This menu option shows see an abstract of each participant's reservations. Additionally, the information regarding the arrival and departure of the participant is also shown if it has already been completed.



DOCUMENTS

This menu option shows any general document such as user guides, terms, and conditions, etc shared by the organising committee. Please note that this repository may be empty and that these documents will not be restricted to any user.





CONTACT

If you have questions or need help from the LOC, don't hesitate to contact us:

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