

UIPM **ACCREDITATIONS MANUAL**

FOR ORGANISERS



UNION INTERNATIONALE
DE PENTATHLON MODERNE



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● Registration Overview

The registration process is opened by the organizers early enough before the beginning of the event.

At a certain moment, the registration process will close and be made unavailable publicly through the UIPM NF Portal. From this moment, late registrations are possible only at the organizer's discretion. Such late registrations are basically performed in the same manner as the ordinary ones.

There are two kinds of registrations that are supported by the system:

- **Group registrations:**

In big events, especially sport ones, teams and delegations are usually registered as groups by the head of delegation that fills in the registration forms for all members of the delegation.

- **Individual registration:**

A participant registers himself / herself only by filling in a registration form. For example, an individual journalist can register himself / herself only, because he / she does not come with a group.

● Accreditation

The organizing committee analyzes the submitted registrations and considers them for accreditation. In general, registrations are considered one at a time, and each one is approved individually. Optionally (this is the case especially in smaller and less strict events), an entire set of selected registrations or all registrations of a participant group can be approved in a single batch.

Basically, an accreditation means an approval of the access rights requested by the registration (which are basically the default rights assigned to the participant's role). In some exceptional cases, some of the rights can be denied (revoked) or some additional added.

In some cases, a registration can be rejected, and accreditation not given to the participant. This should be simply registered as a decision in the system, along with optional remarks.

● Pass Printing and Issue

Once it is approved, an accreditation can go to the printing stage. In general, approved accreditations immediately go to printing, but in some exceptional cases, they might be put on hold for later printing (which is then activated explicitly by a manual action in the system).

In case of a loss or damage of a pass, a new pass can be issued for the same accreditation. This should also be recorded in the system.

● Accreditation Module

The accreditation module is used by the organizing committee staff to support the registration and accreditation processes: registering participants of various kinds (e.g. athletes, journalists, technical staff, security, etc.) and the ultimate issuance of accreditations in the form of printed passes.

● Getting Started

Go to the login page of the Event Organization System (EOS) Portal main page <http://uipm-nameofthehostcity.gem-technology.com> (Image 1).



Image 1

Log in to the accreditations module using the account that has been given to you by the administrator (it@pentathlon.org to get it) (image 2).

Image 2



IMPORTANT!

If you log in for the first time, you should change your password as soon as possible! See below for instructions. Once logged in, you should see the dashboard (Image 3).

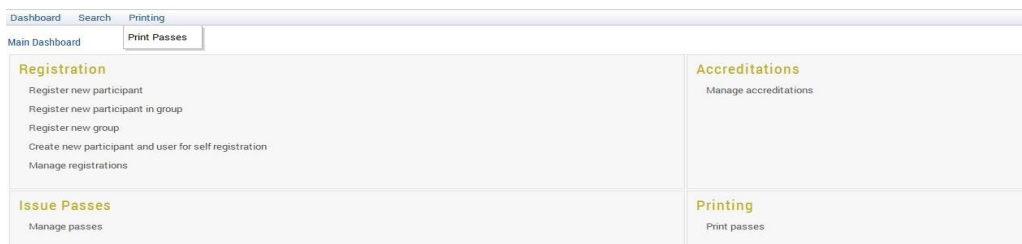


Image 3

The dashboard contains the links to the wizards for the common tasks - registrations, approval of accreditations, printing and issue of passes:

- Registration
 - Register New Participant
 - Register New Participant in Group
 - Register New Group
 - Create New Participant and User for Self-Registration
 - Manage Registrations
 - Bulk Registration
- Accreditations
 - Manage Accreditations
- Issue Passes
 - Manage Passes
- Printing
 - Print Passes

Common Screen Elements

The principal navigation elements are visible on every page - they are:

Main menu (top left) – contains shortcuts to various pages:

- Dashboard - (Please see image 4, mark A)
- Search engine - (Please see image 4, mark B)
 - Groups
 - Registrations
 - Accreditations
 - Passes
- Printing menu - (Please see image 4, mark C)

Print Passes

For more details, please refer to the sections describing the pages.

Change password link (top right) (Please see image 4, mark D) – opens the Change password page.

Sign out link (top right) (Please see image 4, mark E) – logs you out of the module.

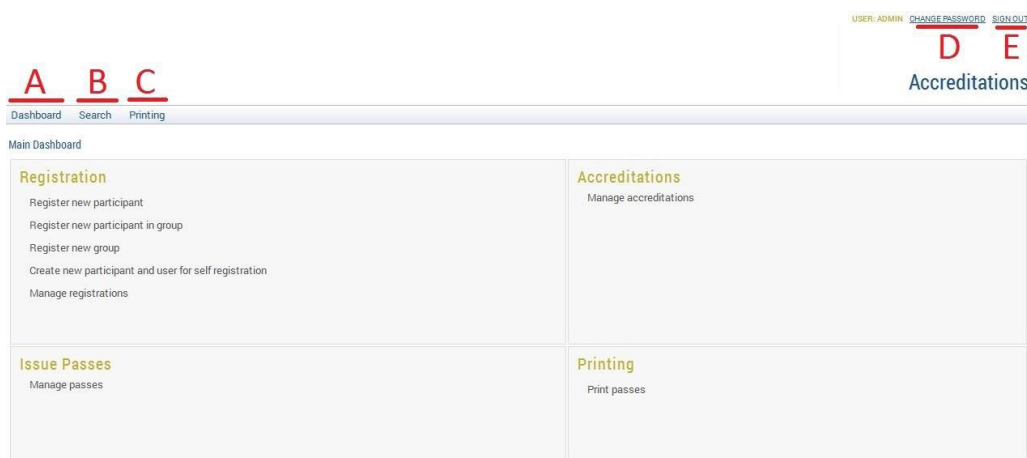


Image 4

● Register new participant wizard

The register new participant wizard can be used to register an individual participant, who does not belong to a group.

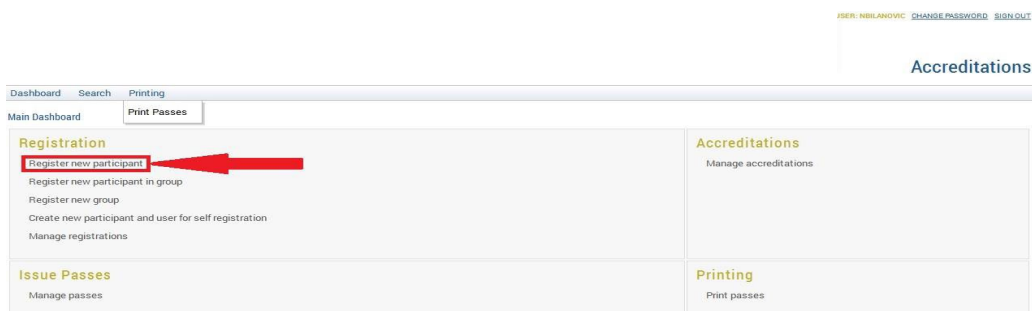


Image 5

This wizard covers the registration and optionally the accreditation, printing and issue of the pass. It is useful, for example, when a person has arrived at your desk in order to get registered and receive the pass on site.

● Step 1 – Select the role for the participant

Select the role of the new participant. The command bar offers the following buttons:

- Create registration and proceed button – *to proceed to the next step (filling out the online registration forms).*
- Cancel – *simply returns to the dashboard.*

Step 2 – Fill out the registration forms

Fill out the registration forms for the new participant.

Fields marked with an asterisk (*) are mandatory. Other fields are optional. Some fields may have a description (requirement or remarks) written below the field.

You can circulate through the tabs by using the Next and Previous buttons.

Image 6

The command bar offers the following buttons:

- Submit registration and proceed – *Submit the registration and proceed to the next step. If the registration is not valid, a message will pop up telling which fields haven't been filled out correctly.*
- Discard registration and leave – *Discard (i.e. delete) the registration and return to the dashboard.*
- Leave – *Returns to the dashboard and leaves the registration in the pending state. All data is automatically saved, already while you typed it in.*

Step 3 – Created registration

After registration submission, here you can once again review the submitted registration before taking further steps.

The command bar offers the following buttons:

- Create accreditation and proceed – *This will create a pending accreditation and advance to the next step.*
- Leave – *Simply returns to the dashboard.*

Image 7

Step 4 – Create and approve accreditation

Here you can review the participant's access rights (on the Authorization tab) and modify them as needed.

Authorization tab shows (image 8) given access rights to this accreditation. Access rights may be modified while the accreditation is pending. They're read-only for approved and cancelled accreditations.

Image 8

● Register new participant in group wizard

Register new participant in group wizard should be used to register a participant that belongs to a participant specific group.

Dashboard Search Printing

Main Dashboard Print Passes

Registration

- Register new participant
- Register new participant in group**
- Register new group
- Create new participant and user for self registration
- Manage registrations

Issue Passes

- Manage passes

Accreditations

- Manage accreditations

Printing

- Print passes

● Step 1 – Selecting the group

Select the group in which to register the new participant. The search filter and the search results are the same as the ones in search participant groups page. Please see that article for an explanation of the search fields and the search results.

In order to select a participant group, you must follow these steps:

1. Use the search to find the group.
2. Click once on the group in the participant group column in order to select it.

Do not double-click or select other cells.

3. Press the next button in the command bar to advance to the next step

If the group itself is not registered yet, it can be done by using the Register new group wizard.

Dashboard Search Printing

Register New Participant in Group - Find a group to register a new participant, select the group in the table and press Next

Prototype: No Clear filter Advanced Search (<->)

Group name:

Text code:

Search

Participant Group	to prototype	Text code	Head	First name	Last name	# pending registrations	# submitted registrations	# processed registrations	# pending accreditations	# approved accreditations	# canceled accreditations	# created passes	# printed passes	# issued passes	Up to date
MEDIA	No			10010	-	1	0	1	0	1	0	0	1	0	Yes
LDC	No			10009	-	1	0	0	0	0	0	0	0	0	Yes
TEAMS	No			10002	-	2	0	0	0	0	0	0	0	0	Yes
All groups	No			-	-	5	0	1	0	1	0	0	1	0	Yes
UIPRA	No			10005	-	1	0	0	0	0	0	0	0	0	Yes
France	No			10003	-	1	0	0	0	0	0	0	0	0	Yes

Export result

Result: 1 to 6 of 6

Next >> Cancel

● Step 2 – Select the Role for the Participant

Select a role of the new participant. The command bar offers the following buttons:

- Create registration and proceed button – *to proceed to the next step (filling out the online registration forms).*
- Cancel – *simply returns to the dashboard.*

Dashboard Search Printing

Register New Participant In Group - Select the role for the participant

Select role:

- Athlete
- Team Members
- Team Manager
- Head Coach
- Coach
- Team Doctor
- Team Physiotherapist
- Team Official
- Media Liaison

Create registration and proceed >> Cancel

● Step 3 – Fill out the registration forms

The step 3 of this wizard is basically the same as the step 2 of the register new participant wizard.

Please follow the instructions described therein: fill out the registration forms.

● Step 4 – Created registration

The step 4 of this wizard is basically the same as the step 3 of the register new participant wizard.

Please follow the instructions described therein: selected registration.

● Step 5 – Created Accreditation

The step 5 of this wizard is basically the same as the step 4 of the register new participant wizard.

Please follow the instructions described therein: created accreditation.

● Step 6 – Created pass

The step 6 of this wizard is basically the same as the step 5 of the register new participant wizard.

Please follow the instructions described therein: created pass.

Step 7 – Print pass

The step 7 of this wizard is basically the same as the step 6 of the register new participant wizard.

Please follow the instructions described therein: print pass.

Search engine

Search engine pages allow you to search for participant:

- Group
- Registration
- Accreditation
- Pass

Search filter is displayed at the top and the search results at the bottom of the page. Press the Search button to update the search results at any time.

The screenshot shows a web application interface for searching participants. At the top, there are tabs for 'Dashboard', 'Search', and 'Printing'. Below the tabs is a 'Search registrations' section with a form containing fields for 'Identifier', 'Status', 'First name', 'Last name', 'Gender', 'Nationality', and 'Last'. A 'Clear filter' button is located next to the 'Identifier' field. To the right of the form is a link for 'Advanced Search (>>)'. Below the form is a 'Search' button. The search results are displayed in a table with columns: 'Registration', 'Created at', 'Status', 'Submitted at', 'First name', 'Last name', 'Role', 'Group', 'Discipline', 'Responsible', 'Arrival date', and 'Departure date'. The table shows 9 results, with the first result being '10010-R0' created on 2/11/14 at 10:31 AM, with a status of 'Pending'. The table also includes a 'Select columns' button and a 'Result: 1 to 9 of 9' indicator. At the bottom of the table, there is an 'Export result' button and a 'Result: 1 to 9 of 9' indicator. The interface also includes navigation buttons like '< Back' and 'Leave'.

Basic search criteria

Basic search filter will be automatically open/visible and depending what category you want to search there will be most common filter options.

Advanced search criteria

Advanced search filter can be shown/hidden by clicking on advanced search. It includes the more advanced criteria and switches.

Pressing the Clear filter will reset all search criteria to initial, empty, values.

Dashboard Search Printing

Search registrations

Identifier: Clear filter

Status:

First name:

Last name:

Gender:

Nationality:

Last: ☐

Advanced Search (<>)

Has photo: ☐

Date of arrival from: To:

Date of departure from: To:

Responsible person identifier:

Responsible person first name:

Responsible person last name:

Created from: To:

Submitted from: To:

Select role: ☐ Athlete ☐ Team Members ☐ UIPM Family ☐ Competition Authorities ☐ LOC, Media, Security & VIP

Select group: ☐ TEAMS ☐ UIPM ☐ LOC ☐ MEDIA

Select discipline:

☒ Any role ☒ Any group

Search

Select columns

Result: 1 to 9 of 9

Registration	Created at	Status	Submitted at	First name	Last name	Role	Group	Discipline	Responsible	Arrival date	Departure date
10010-RD	2/11/14 10:31 AM	Pending	-	-	-	Media Officer	UIPM	MEDIA	10010	-	-

< Back Leave

Search Results

Search results will be shown in the bottom of the page and depending what category you have searched they include most common columns (mark A):

Dashboard Search Printing

Search participant groups

Prototype: No Clear filter

Group name:

Text code:

Search

Select columns

Result: 1 to 6 of 6

Participant Group	Is prototype	Text code	Head	First name	Last name	# pending registrations	# submitted registrations	# processed registrations	# pending accreditations	# approved accreditations	# canceled accreditations	# created passes	# printed passes	# issued passes	Up to date
MEDIA	No		10010	-	-	1	0	1	0	1	0	0	1	0	Yes
LOC	No		10009	-	-	1	0	0	0	0	0	0	0	0	Yes
TEAMS	No		10002	-	-	2	0	1	0	1	0	1	0	0	Yes
All groups	No		-	-	-	5	0	2	0	2	0	1	1	0	Yes
UIPM	No		10005	-	-	1	0	0	0	0	0	0	0	0	Yes
France	No		10003	-	-	1	0	1	0	1	0	1	0	0	Yes

Export result

Result: 1 to 6 of 6



IMPORTANT

Some browsers may require you to allow pop-ups in order to have the export function working.

Select columns (mark B) allow you to choose which columns will be included in the search result. Press the Search button to update the results after making a choice.

Click on a column header to sort the results by that column. Click again, to toggle the sorting order between ascending and descending.

Results can be exported in Microsoft Excel format by pressing the export result button (mark C).

Print Passes

To be able to print the passes scheduled for printing you must go to the printing section/queue.

Once you are there you will be able to choose which pass you want to print.

If there are several passes ready to be printed and you do not want to print them all, you can use search/filter options to choose passes that you want to print.

Select one or several passes from the list (or press select all if you want them all) and then press the batch print button in order to have them printed.

A printable HTML document containing the high-resolution (300dpi) images of the selected passes will be opened in a new browser window.

Use your browser's Print dialog in order to print the passes on your local printer.

After having issued the batch print request, the passes will be automatically marked as printed. However, you need to confirm this - see Confirm the result of the batch print.



IMPORTANT

Some browsers may require you to allow pop-ups in order to have the batch print working.

● Confirm the result of the batch print

After a batch print request, you need to confirm whether the selected passes have been printed successfully:

1. Click on a pass in order to toggle its printing status between successful and failed. The passes that have failed to print for whatever reason should be marked in dark red, whereas those that have been printed successfully should be marked in dark green.
2. Check the retry failed passes checkbox if you want to have the failed passes put back into the printing queue.
3. Finally, press the confirm button to conclude.

Passes that have been printed successfully shall have their status set to "printed", whereas those that have failed shall earn a "print failed" status. If you leave this page without a confirmation, the passes shall remain in the "printed" state.

Dashboard Search Printing

Confirm the result of the batch print

Select passes that haven't been printed correctly:

	10017-P1 (Successfully printed)
	10022-P1 (Successfully printed)

☐ Select all

☐ Retry failed passes

● Frequently asked questions

This section contains the possible answers to some frequently asked questions. Note that very often there are several ways to achieve the same goal.

● A VIP came with his/her spouse and I have to issue a pass for the spouse

You can use the register new participant in group wizard if the VIP is part of a participant group. Otherwise, use the register new participant wizard.

In either case, by using one of these wizards, you will fill out the registration forms, create and approve an accreditation and finally create, print and issue the pass for the VIP's spouse.

● Later, the VIP came again and requested the access to a restricted zone for both of them

In order to fulfill this request, you must:

- create new accreditations for them (and extend the access rights before approval)
- create and print new passes for the new accreditations
- cancel their old accreditations
- take away their old passes and declare them as returned (or destroy them and declare them as discarded).

You can use the search participants page to find them and see all their accreditations and passes. You can also create the new accreditations here. Alternatively, you can use the search passes and the search accreditations pages.

● A person has lost his/her pass and requests a replacement

- declare the old pass as lost
- create a new pass from the latest approved accreditation, print it and issue it to the person

You can use the search participant page to find the participant and see all of his/her passes. You may also create the new pass there. Alternatively, you can use the Search passes and the search accreditations pages.

● The same person has found her pass and now returns it. What do I do now?

You need to change the pass status to returned.

You can use the search passes page to find the pass that was previously declared as lost.

● I have prepared all passes for a group, but there are some last-minute changes to be done

One member of the group gave up, another member (unregistered) came instead of him/her, and it is reported that the registration data of another participant needs correction. I must give the passes to the head of the group, who is already here and is waiting impatiently. What do I do?

As of the member who gave up, you need to:

- destroy her pass and declare it as discarded
- cancel her accreditation
- cancel her registration

You can use the search participant page to find the participant and see all of his/her registrations, accreditations and passes. Alternatively, you may use the manage passes, manage accreditations and manage registration wizards to find the pass, the accreditation and the registration respectively.

In order to register the new member, it is easier to use the register new participant in group wizard - you will fill out his/her registration forms on site, create and approve and accreditation for her, and finally create and print the pass.

As of the incorrect registration, you need to:

- Find the registration and modify it to correct the data (a new registration will be created for this participant)
- Cancel the old accreditation
- Destroy the old pass and mark it as discarded

For the first three steps you can use the search participant page to find the participant and see all of his/her registrations, accreditations and passes.

Create a new accreditation and a pass

you can use the approve individual registration to create and approve an accreditation for the new registration and finally create and print the pass for the new accreditation.

When both old passes have been discarded and both new passes have been created and printed, you can issue the passes to the head of the group and report to have done so by using the issue passes to group wizard.



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