



**CANOE KAYAK  
CANADA**

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# **CANOE KAYAK CANADA REGISTRATION SYSTEM STATEMENT OF REQUIREMENTS**

**VERSION: 3.0**

## **Canoe Kayak Canada**

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## 1. Introduction

This document provides the high-level requirements needed for Canoe Kayak Canada's Registration System (CKCRS).

### 1.1. Objective

The objective of the document is to provide specifications for a national registration system such that potential system developers and suppliers can understand the needs of the various Canoe Kayak Canada stakeholders (national, provincial/territorial, discipline-specific, division, and club) to a level where they are able to provide a system solution that meet those needs.

### 1.2. System Parts

CKC sees the system as a composite of two major parts: a membership tracking database and an event management system. The event system has two sub-parts: event advertising and event registration. These components must all be integrated to avoid pitfalls and labour involved in deploying, using and maintaining an unintegrated system. The various users expect that any new system be seamless in look and feel and facilitate operations rather than impede progress.

The system delivers these core purposes in the following order:

- 1) Membership Tracking
- 2) Event Advertising
- 3) Event Registration

### 1.3. Current Implementation Components

CKC has a custom web-based membership database system built on Microsoft **ASP.Net** technology. Event advertising is done on CKC's website (built on Wordpress) using a third-party plugin (The Event Calendar by Modern Tribe - <https://theeventscalendar.com/product/wordpress-events-calendar/>), and event registration is done in a third-party web system, Eventbright, or event by postal mail in some instances.

None of these components have any real integration between them (i.e., CKC's website cannot access any of the information in PadTrac, Eventbright has no knowledge of an event's details listed on the CKC website, and information from the event registration system does not make it back into the website or PadTrac).

## **1.4. Expectations**

### **Technology**

The expectation is that the system will have a projected 15-year lifespan. Technology changes and the future is unpredictable, but the underlying system components must be designed to migrate near seamlessly as technology progress without forcing a major redesign: i.e. PHP 7.2 to 8.0.

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

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

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

### **Retention and Privacy**

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

### **Timeline**

CKC recognizes that the development of a national registration system is major undertaking. CKC understands that multiple phases of development may be necessary to implement all the needs of the various stakeholders.

CKC expects that the primary core purpose – member tracking – will be met by the initial version of the CKCRS and other features may require future stages of development.

### ***1.5. Limitations***

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

## **2. Overview**

### **2.1. Organizational Structure**

Canoe Kayak in Canada is a uniquely-organized National Sport Organization (NSO) because there are three separate disciplines - Marathon, Whitewater and Sprint. Each of the three disciplines has a Member Council that governs the discipline.

Depending on the discipline, individuals can become members in different ways. In most provinces and territories, there are Provincial/Territorial Sport Organizations (PTSOs) that govern all three disciplines of Canoe Kayak. However, in some provinces there are also Discipline-Specific Provincial Sport Organizations (DPSOs) that govern the provincial activities of that discipline. For example, there are three DPSOs in Ontario as well as a PTSO. All of CKC's PTSOs and DPSOs are listed on this website: <http://canoekayak.ca/provincial-associations/>

Within the Marathon and Whitewater disciplines, individuals can become members through a PTSO or DPSO in most provinces/territories. Some individuals may be direct members of the PTSO, while others may also be registered with a club.

Within the Sprint discipline, some PTSOs or DPSOs govern the discipline at a provincial/territorial level, however; individual membership is almost always through a member club, which in turn is a direct member of CKC through one of six (6) geographical Sprint Racing Divisions. For reference, the East-Ontario Division website is here: <http://www.ckceod.com/>

Finally, some members can register directly with CKC.

### **2.2. Disciplines**

As the NSO, CKC values and serves each discipline. Historically, the Sprint discipline represents the largest number of paddlers, followed by Whitewater, then Marathon. The first two are Olympic sports and Sprint has the longest history at the Olympic level. All three disciplines have competition as a major aspect of the discipline.

While competition is an important part of sport, there are sections of recreational paddlers mainly in the Whitewater disciplines which fall under CKC's mandate.

For more information about the sport, see <http://canoekayak.ca/about-the-sport/>



## **2.3. Participants**

Participants are the main category of CKC member. CKC, PTSOs, DPSOs, Event Organizers, and clubs all organize and offer various types events or activities for members. These events can be training and day camps at clubs, competitions at the local, regional and national level, training opportunities for paddlers (such as camps), or educational or development events for coaches, officials or administrators.

Non-participant membership in CKC has been traditionally available as 'Individual membership', and this will be continued as a new alumni membership category that will be directly with CKC, or through a Discipline, PTSO/Division/DPSO, or club.

Membership fees vary according to the member's role. There is a CKC-defined fee component, a PTSO/Division/DPSO fee component (when applicable), and a club fee component (when applicable) that can vary depending on the club.

Individuals can be members of multiple disciplines but not multiple PTSOs/Divisions.

At the club level, members can be associated with multiple clubs. However, in the Sprint discipline there are rules around club membership as a participant cannot compete for two different clubs, and the CKCRS must ensure this limitation is respected while still ensuring that there are no duplicate participants in the system to get around this limitation (either intentionally or not.) CKC foresees a 'primary club' designation that allows registration in multiple clubs, but that indicates the one club the participant will compete for in regattas. The primary club designation may also be indicative for billing purposes.

Membership is designated over a 12-month period, currently set from April 1 through March 31 and is not forecasted to change.

## **2.4. Events**

There are a wide range of events in canoeing and kayaking. Competitions are a major category and use different terms based on disciplines and sub-disciplines. For example, Sprint competitions are referred to as "regattas" whereas Whitewater polo has "tournaments".

**"Regatta/Competition"** – a Canoe Kayak competition event that is typically organized for multiple clubs/PTSOs/DPSOs over a fixed time. For example, a regatta/competition is often

organized for several clubs over a weekend. A competition will typically have a chair or manager designated as the Event Contact.

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

Depending on the discipline, events can be organized by CKC, a PTSO/DPSO/Division, a club, or an Event Organizer.

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

### 3. Objectives

The Canoe Kayak Canada Registration System (CKCRS) is intended to meet the following core objectives:

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

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

Although CKC expects that many PTSOs, DPSOs and clubs will use the CKCRS for their registration purposes, the CKCRS must also allow for the possibility that a PTSO/Division/DPSO or club may have their own distinct system (manual or automated) for undertaking their own member and/event registration and allowances must be made for future integration or adaptability. These types of

modifications will only be considered after CKCRS system delivery, and CKC along with the requesting organization will define and provide requirements if such interoperability is required in the future.

## **4. Information Model**

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

### **4.1. Membership**

An individual or group is a member at a prescribed membership category if they pay the membership fee in accordance with the policies of CKC, a PTSO/Division/DPSO, and/or a club and agree to terms of membership. Membership categories and fees can be defined distinctly at the CKC, PTSO/Division/DPSO, and club levels, based on the alignment required in each discipline.

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

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

Membership provides specific services over a 12-month period. An individual or group should be able to purchase membership for a future year while being a member for the current membership year.

### **4.2. Individual Membership Roles**

Participants are the main membership category but individuals should be able register in the CKCRS in a variety of roles, including:

- Paddler (Participant/Registrant)
- Parent/Guardian of a Paddler
- Coach
- Official
- Staff
- Club/PTSO/Division/DPSO Manager
- Medical Staff
- Event Organizer
- Volunteer

- CKC/PTSO/Division/DPSO/Club Volunteer (this category is for individuals typically serving as Executive, Board, Committee or volunteer members for the respective association)
- Alumni member

Members may register in one or more of the three disciplines and may fill more than one of the above roles.

### **4.3. Member Profile**

Primarily, the member profile should indicate with which organization(s) the individual is registered and in which role(s), described above. Collected information should include:

- First Name (required)
- Last Name (required) (Note that CKC will need to support names following Indigenous cultural practices. single names are returning to use, and are very much different than Westernized names - Read <https://www.cbc.ca/news/indigenous/opinion-cree-names-reclamation-chelsea-vowel-1.488760>)
- Day/Month of Birth (required)
- Year of Birth (required)
- Gender Identity (required) (See CKC gender policy at <http://canoekayak.ca/wp-content/uploads/2018/05/Gender-Inclusion-Policy-March-2018.pdf>)
- Address/City/Province/Postal Code (each stored separately, required)
- Email address (required)
  - Consent to allow email communications from each level of the organization (a member may want club emails but not CKC emails) (checkboxes – text must comply with Canadian anti-spam legislation)
- Phone number(s)
  - Consent to allow text communications from each level of the organization (checkbox - text must comply with Canadian anti-spam legislation)
- Provincial/Territorial Sport Organization (PTSO) (if applicable)
- Division (for Sprint Discipline only)
- Clubs (if applicable)
- Primary Club (if applicable)
- Participant role(s) in each club
- Boat Type/Class (list to be provided by CKC)
- Swimming Competency Level
- Aboriginal Status (checkbox)

- Para-canoe Status (checkbox)
- Intellectual Disability/Special Olympic Status (checkbox)
- Health Insurance Number (optional)
- Medical Conditions (optional)
- Emergency contact information
- History of Criminal Record Checks (CRC) and Vulnerable Sector Check (VSC) (if applicable)
  - Date of latest CRC and result
  - Date of VSC and result
  - Scope of jurisdiction the CRC/VSC
- Coaching certification information (if applicable) - linked to the Coaching Association of Canada's NCCP's Locker system.
- Learning Facilitator designation/levels (if applicable) - same as above.
- Officiating certification information (if applicable), including:
  - Status and certification level(s) in Canoe Kayak Canada
  - History of officiating clinics, training and assessments
  - History of competitions that have been officiated (Note that a member may be officiating in one or more disciplines)
- History of participation (including associated club(s) and membership) (optional)
- History of event registration (optional)
- History of competition results (optional)
- Alumni Status per discipline
- Status of good-standing (optional)
- History of any disciplinary action (optional)
  - Textual description
  - date range of any sanction conditions
- Additional comments for each level of the organization, so that notes for the paddler can be kept. While comments should be visible to all, only administrators should be able to add/edit/delete them and the author should indicated with a datetime stamp (optional)
- Administrative roles in the CKCRS system should also be tracked in a member's profile.
- The system should have a numeric field for the CKC number, which is a seven-digit unique identifier assigned to each paddler. Current entries imported from PadTrac will have a value already assigned, new entries will need to generate a new number based on the same algorithm used in PadTrac. CKC will supply this information to the selected vendor.

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

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

The system should also be able to store and maintain information on competition results for athletes on an ongoing basis over their lifetime. Data retention policies will need to be respected in such tracking (see **Section 1.4.2**).

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

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

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

### **Background Check Status**

Background checks usually require a Criminal Record Check (CRC) and/or Vulnerable Sector Check (VSC). Users may log into their accounts and edit the member profile to indicate the date of the CRC/VSC check. They may also attach a scan of the CRC/VSC confirmation letter. The system should be able to send a message to the user when their CRC/VSC status is required to be renewed (where the triggering condition is configurable by the administrator).



#### **4.4. Account**

This is the information relating to registrations, invoices, payments and receipts for one or more members. Accounts may be individual accounts or family accounts. For individual accounts there may be only one member associated with the account. For family accounts there may be multiple members with at least one individual designated as the Parent/Guardian, who will manage the account. The parent/guardian typically must take responsibility for both legal and payment obligations for the dependant members. Accounts may be accessed by one individual only through secured access. The member profile should remain unique (i.e., there should not be duplicate member records in this case). For more information see **Section 2.3**.

#### **4.5. Other Membership Categories**

In addition to the individual membership category, the CKCRS should support additional membership categories with different types of profiles.

##### **Organization Membership**

This profile should include the following:

- Organization name
- Organization type (e.g., club, division, PTSO, DPSO)
- Organization address
- Organization contact information (name, email address) (Note that the profile should support multiple contacts)
- Agree to adhere to bylaws and policies, as amended (checkbox)
- Additional comments (optional)
- Storage of related documents (optional)

Again, future enhancements may require additional fields to meet CKC's goals. The underlying dBMS should support these types of additions, and the existing web interface must not break.

##### **Corporate Membership**

This profile should include the following:

- Organization name
- Contact individuals (name, email address)

- Additional comments (optional)
- Storage of related documents (optional)

## 5. Administration

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

1. CKC
2. PTSO/Division
3. DPSO
4. Clubs
5. Event Organizer

The CKC administrator controls access to the system by PTSO/Division administrators. A CKC administrator shall be able to view and edit information relating to CKC events and shall be able to view and edit information on all members, PTSOs, Divisions, DPSOs and clubs that have registered on the CKCRS.

A PTSO/Division administrator controls access to the system by DPSO administrators and club administrators. A PTSO/Division administrator shall be able to view and edit information relating to all members within their organization and for their Events. They should have no access or ability to view members registered with other PTSOs/Divisions. However, they would be able to view information on Events that are organized by CKC, other PTSOs/Divisions/DPSOs, and event organizers.

A DPSO administrator shall be able to view and edit information relating to all members within their organization and for their Events. They should have no access or ability to view members registered with other PTSOs/Divisions/DPSOs. However, they would be able to view information on Events that are organized by CKC, other PTSOs/Divisions/DPSOs, and event organizers.

A club administrator can view and edit information relating to all members who register within their organization and for their events. They should have limited access or ability to view limited member information for other clubs so that duplicate records can be prevented. They would be able to view information on events that are organized by CKC, other PTSOs/Divisions/DPSOs, and event organizers.

Note: In the above four paragraphs, it was indicated that administrators in parallel organizations (such as two DPSO administrators in different disciplines in Ontario) should have limited ability to

view member information in the other organization. This restriction should not apply if the individual is a member of both organizations; in which case both DPSO administrators should be able to see the member's information.

## **5.1. CKC Administration**

The CKCRS should support a CKC administrator role.

### **Manage CKC Information**

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

- Configuration of PTSO/Divisions/DPSOs and clubs
- Configuration of CKC Events
- Configuration of membership categories, membership start/end dates and associated fees for membership with CKC
- Configuration of competitive categories, including the creation of age categories, competition types, time standards, boat classes, and sanction type
- Configuration of tax information applying to CKC registration fees
- Creation and editing of general ledger account names for use with financial transactions

### **Manage User Information**

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

- Add and edit members and their associated information (where members can include PTSOs, DPSOs, Divisions, clubs, and individuals)
- Add and edit accounts and their associated information

### **Member Transfers**

The CKC administrator shall be able to transfer members as follows:

- PTSO/Division to PTSO/Division
- Primary Club to Primary Club. (Note: there are restrictions and rules around when and how a transfer may be accomplished in the Sprint discipline).

## **5.2. PTSO/Division Administration**

The CKCRS should support a PTSO/Division administrator role.

### **Manage PTSO/Division Information**

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

- Configuration of PTSO/Division information
- Configuration of PTSO/Division events
- Configuration of PTSO/Division membership categories and associated fees for membership at the PTSO/Division level
- Configuration of competitive categories, including the creation of age categories, competition types, time standards, boat classes, and sanction type
- Configuration of tax information applying to PTSO/Division registration fees
- Creation and editing of general ledger account names for use with financial transactions

### **Manage User Information**

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

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

### **Member Transfers**

The PTSO/Division administrator shall be able to transfer members as follows:

- Primary Club to Primary club within the PTSO/Division. (Note: There are restrictions and rules around when and how a transfer may be accomplished in the Sprint discipline).

## ***5.3. DPSO Administration***

The CKCRS should support a DPSO administrator role.

### **Manage DPSO Information**

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

- Configuration of DPSO information
- Configuration of DPSO events
- Configuration of DPSO membership categories and associated fees for membership at the DPSO level
- Configuration of competitive categories, including the creation of age categories, competition types, time standards, boat classes, and sanction type
- Configuration of tax information applying to DPSO registration fees
- Creation and editing of general ledger account names for use with financial transactions

### **Manage User Information**

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

- Add and edit members and their associated information (where members can include clubs, and Individuals)
- Add and edit accounts and their associated information

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

The CKCRS shall support a club administrator role.

### **Manage Club Information**

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

- Configuration of club information
- Configuration of club membership categories and associated fees for membership at the club level
- Configuration of competitive categories, including the creation of age categories, competition types, time standards, boat classes, and sanction type
- Configuration of tax information applying to club registration fees
- Creation and editing of general ledger account names for use with financial transactions

### **Manage User Information**

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

- Add and edit members and their associated information

- Add and edit accounts and their associated information

### **5.5. Event Organizer**

The CKCRS shall support an Event Organizer role.

#### **Manage Event Information**

- Configuration of event organizer's events

### **5.6. Deleting Members**

Members are often registered with multiple organizations at the time of registration. For example, a member who registers with a club will often also be registered with a PTSO/Division. Similarly, members who are athletes are almost always registered with CKC. For this reason, only the CKC administrator should have the ability to completely remove a member from the CKCRS. Club administrators, DPSO administrators, and PTSO/Division administrators may mark a member for deletion on a conditional basis, but the CKC administrator must have final removal authority.

### **5.7. Manage Events**

Each level of administrator should be able to view all events in the CKCRS including CKC events, PTSO/Division events, DPSO events, event organizer events, and club events. However, each level of administrator should only be able to edit their own events. See **Section 2.4** for more about events.

Each administrator should be able to create and manage the following information for events in the CKCRS:

- Event Type (for example, "Regatta", "Meeting", "Camp", "Clinic", "Fundraiser", etc.)
- Competition Categories (if the event has categories)
- Event Contact Person (including contact email and phone number)
- Event Name
- Event Description
- Event Website (if any)
- Location (open map data source preferred.)
- Venue
- Start and End date and time (stored in UTC, but displayed in local time of the location)
- Participant pre-requisite (if any)
- Performance pre-requisites (if any)

- Age Class(es) (if applicable)
- Boat Classes (if applicable)
- Start and End Date for registration, including early bird periods
- Registration Fee (and associated taxability requirements)
- G/L Account for fee income
- Minimum/Maximum number of registrants
- Payment Method options to be offered
- Waitlist option (sequential or prioritized)
- Event may be optionally designated as “Sanctioned” or “Unsanctioned”
- Textual annotations including terms/conditions, waiver of liability, etc.
- Ability to attach files (or include links, if documents cannot be stored) associated with the event (map, poster, etc.)
- Up to five (5) user-defined fields (for example allergies, medication info, t-shirt size, special pick up or drop off instructions, etc. See **Section 5.7.3**).

Administrators should be able to edit the list of registrants for any of their events. Administrators may also remove registrants from the event registration list or move registrants from one event to another (for example, in the case where an event is cancelled and a comparable event is available in its place). Administrators may authorize and process refunds to a registrant who previously paid the event fee.

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

### **5.7.1. 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. Administrators should be able to invite waitlisted registrants to register, view invitations and dates of invitations. Administrators 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.



### **5.7.2. Copy / Save Events**

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

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

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

### **5.7.4. Event Eligibility**

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

- Registrant age constraints
- Registrant gender constraints
- Boat classes
- Membership category requirements
- Registrant role(s)
- Previous performance standards
- Pre-requisite qualifications or licenses (coaching or officiating certification level)
- Criminal Record Check status
- Attendance/Results at qualification events

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

### **5.7.5. 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.

### **5.7.6. Event Change Notification**

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

### **5.8. Communication**

It would be beneficial if administrators could use various selection criteria to be able to create a list of members to whom they may then send an email message through the CKCRS. The message should clearly indicate that the message is from the administrator on behalf of CKC, the PTO/Division/DPSO, or the club. The message body should be able to be formatted in HTML to allow richer and more appealing viewing. This formatting should also allow branding of the message by the organization. The system should maintain and display information relating to the status of the messages sent such as messages rejected, messages read, message unopened, etc., however Canadian data privacy laws must be respected. Email messages should include both CC and BCC capabilities.

CKC recognizes that a working email delivery system within the CKCRS may be outside the scope of the system requirements and/or email integration could occur with another tool separate from the CKCRS.

### **5.9. Disciplinary Action**

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

### **5.10. Coordinators and Registrars**

Administrators should have the capability to create accounts for individuals who take on specific roles in the organization. For example, an administrator may want to assign duties within the CKCRS to the following individuals:

- Event Contact
- Event Manager / Event Chair
- Registrar
- Disciplinary Chair

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

## **5.11. Administrative Reporting**

### **5.11.1. Standard Reports**

CKC expects to work with the system supplier to determine which reports can be created from the collected member information and event information. Eventually, the CKCRS should be able to produce the following standard reports, with full filtering capabilities:

- Event Reports (event registrants, outstanding payables for event, etc.)
- Club List
- Membership Reports by category/year/PSTO-Division-DPSO/club, including other membership filters:
  - Aboriginal report
  - Para-athlete Report
  - Volunteers
  - Club Information Report
  - Officials Report
  - Coaches Report
  - Boat Class/Type Report
- Account Report
- Rankings/Power Rankings Report
- Competition Host Report
- Club Competition Results Report
- Qualifier Reports
- Ranking Reports

### **5.11.2. Accounting Reports**

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

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

- Transaction Report (over date range)
- Refund Report

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

### **5.11.3. Executive Reporting**

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

### **5.11.4. Information Exporting**

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

## **6. Registration**

One of the primary objectives of the CKCRS is to provide users with an easy method of registering with CKC, the PTSO/Division/DPSO, or club, and for registering for an Event. The CKCRS 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.

### **6.1. Events**

Anyone should be able to view available events on an event viewer in the CKCRS. The event viewer should display all listed Events and provide the viewer with registration information and other details about the Event.

#### **6.1.1. Listing an Event**

An administrator (or someone designated this specific function by an administrator (see **Section 5.10**)) should be able to submit information about an Event for the purpose of informing the sanctioning organization (e.g., CKC or the PTSO/Division/DPSO) about their intent to offer an event. Some types of Events may require approval to be listed and others may not. If approval is required, the administrator of the governing organization would review the submission and determine whether the event can be listed.

#### **6.1.2. View Event List**

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

- Type of event (e.g., Regatta, meeting, conference, clinic, etc.)
- PTSO/Division/DPSO
- Club
- Location
- Date
- Race card (for Regattas/Competitions)
- Meet Type (for Regattas/Competitions)
- Course (for Regattas/Competitions)
- Season (for Regattas/Competitions)
- Results (for past Regattas/Competitions)

### **6.1.3. Event Registration**

Importantly, individual users cannot register for all Events listed in the Event Viewer. The user must be eligible (see **Section 5.7.4**) but the Event must also allow for individual user registration.

Depending on the discipline and type of Event, sometimes only a coach or a club administrator may register individuals for the Event. When Events are listed by an administrator, it must be clear who may register for that Event.

Individual event registration is frequently required for regattas, 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.

Assuming the user has created or is logged into their Account and has selected to register for an event, the system will then check the eligibility rules for registration in the event. In the case that the member is eligible and there is space in the Event, then the member will proceed to Payment Processing.

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

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

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

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

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

#### **6.1.4. Event Registration by Non-Members**

Presently, CKC permits some non-members to register for Events. CKC is working to ensure that these individuals are provided with 'event memberships' without needing to register with a governing organization or an Event Organizer. CKC would prefer if there was a mechanism in the CKCRS that permitted individuals to register for Events without becoming members.

#### **6.1.5. Pad Comp and Canoe 123 – Future System Interface**

Some organizations within CKC currently use Pad Comp (CKC Regatta Management Software) and Canoe 123 for registration and management of Events.

CKC recognizes that integration of these two systems with the CKCRS may not be possible in the initial stages of the CKCRS's development. However, CKC would like integration to be considered for the future. When considered, the CKCRS should be able to support the Event File, Finish Line Management Files, and Results Files from the following 3<sup>rd</sup> party systems:

- Pad Comp
- Canoe 123
- Finish Lynx

When the CKCRS is coupled to external programs, the CKCRS must be maintained to adapt to changes made in those external applications.

CKC will provide demonstrations of these 3rd party packages and sample output data files for this integration work.

#### **6.1.6. PadTrac/PadComp Sprint Nationals Functionality**

The current CKC Sprint Nationals Registration and Regatta Management functionality is split between the PadTrac Registration System and CKC's PadComp Software. The process for Sprint Nationals entries and race card creation is quite specific and is a strong component of the current system.

This process generally works through the following steps:

1. The pool of athlete entries is pulled from the PadTrac Database.
2. Divisions enter athletes in each event in an online section of the PadTrac Database, which

includes a Divisional Rank of the athletes in each given event.

3. PadComp pulls these entries from the PadTrac Database and checks for errors in ranking or names.
4. PadComp uses the specific rules for entries, lane placements and random entries to create the draw for all 148 events in the Sprint Nationals.
5. PadComp is used to run the regatta.

The new CKC system should be able to accommodate steps 1 and 2 above and be able to input the Divisional entry data into the PadComp program. Additional details about this process will be available on request.

## **6.2. Accounts**

### **6.2.1. Account Creation**

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

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

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

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

### **6.2.2. Maintain Account**

At any time the user may log into their account and be able to edit their personal information, payment information, or change their password. Users should not be able to change their first name,



last name or date of birth. For family accounts the account holder may add, edit or request to remove members within the family from the account, such as when a minor becomes an adult. Administrators will process removal requests. Note that no one but an administrator can delete a member record.

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

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

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

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

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

This feature is particularly important for PTSOs/Divisions/DPSOs or clubs who register their members on the CKCRS in bulk (see **Section 6.4.2**).

### **6.3. PTSO/Division/DPSO and Club Registration**

PTSOs/Divisions/DPSOs may be required to renew their membership annually with CKC. Similarly, DPSOs or clubs may be required to renew their membership with PTSOs/Divisions/DPSOs, as applicable.

The CKCRS should permit the organizations to register their membership with their governing organization via an application form, the submission of required documents, and the payment of any membership dues. The CKCRS should permit the respective administrator (e.g., CKC

administrator or PTSO/Division administrator) to approve or deny membership to the applicant organization and/or indicate if more submissions are required.

### **6.3.1. Certificate of Insurance**

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

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

## **6.4. Member Registration**

CKC, PTSOs/Divisions/DPSOs, and clubs should be able to register their individual members on the CKCRS. The system should support registration as follows:

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

### **6.4.1. Registration Portal**

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

The Registration Portal will permit the administrator to set up event or membership registrations, post events on the Event Viewer (see **Section 6.1.2**), accept and manage registrations, and accept payment for those registrations.

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

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

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

The system shall provide a template of the format for the upload file plus documentation of the format requirements.

The prepared the user must select and run the upload file verification function to determine if the file is valid to be uploaded. Once the file has been successfully validated the user may run the upload function.

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

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

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

The list of members from the PTSO/Division/DPSO or club must have the membership category designated and, after the list is submitted, the registration would move into payment processing. The system would determine which members have not already paid their appropriate membership fees (noting that they may have fees paid by a different club) and create an invoice of fees due. The PTSO/Division/DPSO or club would then pay the fees, per **Section 6.5**.

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

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

In general, whenever a member is registered for an event or membership (such as by an administrator via a bulk upload) the system should send an email to inform them of their registration. In the case where a third party has registered them, the message should encourage them to either create an account or check their account to ensure the information in it is correct and

up to date. Additionally, they should be informed that if they do NOT wish to be registered for the event they should contact the event organizer.

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

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

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

During any registration process, the system shall display the various policies and waivers as set up by the administrator when creating the registration form. The user shall be able to perform an online acceptance of the policies and waivers prescribed as conditions required for registration prior to proceeding to registration and payment. New records created during a mass import should not automatically acknowledge acceptance; this process must be done by the individual user.

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

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

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

#### **6.5. Payment Processing**

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

The system shall support the following methods of payment:

- Credit cards
- Cheque/Cash

- Account Credits

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

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

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

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

### **6.6. Refunds**

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

### **6.7. Results and Rankings**

The CKCRS shall be able to display performance results for athletes and the results of previous competitions/regattas.

### **6.7.1. Upload Results from a Competition**

Following a competition, an administrator (or someone designated this specific function by an administrator) should be able to upload the results into the CKCRS. Results information should be connected to member profiles. Any user shall be able to view a report of the results of a competition on the CKCRS.

### **6.7.2. Viewing Results**

The CKCRS shall be able to display historical performance results for participants.

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

- History of events and results
- Personal bests
- Records
- Biography (if available)

### **6.7.3. Viewing Rankings**

Users should be able to view rankings of athletes by their performance results. Rankings should be displayed by the following criteria:

- Gender identity
- Para-athlete or not
- Competitive category
- Discipline Type
- Event Type
- Season or All-Time
- By year or birth and/or age

### **6.7.4. Viewing Records**

Users should be able to view record performances. Record performances shall be displayed by the following criteria:

- Gender identity
- Para-athlete or not

- Competitive category
- Event Type
- Season or All-Time

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

### **6.7. Promotions**

It would be beneficial if the system could support various mechanisms for discounts and promotions relating to event registration. For example, the system should support coupon codes, "gifts" for registration, early bird periods, etc.

### **6.8. Social Media**

It would be beneficial if the system could support integration with appropriate social media channels that would improve the value and interest for the CKCRS amongst its users. Implementing this request will be considered post-initial delivery.

## **7. Other System Requirements**

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

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

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

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

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

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

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

### **7.4. Online Help**

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

### **7.5. Support Requests**

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

### **7.6. Training Support**

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



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

The system shall provide features that ensure the protection of personal information stored in the CKCRS. The information should be protected in compliance with personal information protection regulations and standards as set out in Canada and its respective Provinces/Territories. CKC will deliver a list of known regulations and standards it must meet.

### **7.8. Security Standards Compliance**

As the CKCRS shall be storing personal information as well as processing financial transactions, the supplier of the CKCRS 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.

### **7.9. Multiple Concurrent Users**

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

### **7.10. High Availability**

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

### **7.11. Offline Mode**

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

### **7.12. Deliverables**

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