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*Competition and Travel  
Management System – CTMS*

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*User Guide – Club Admin*

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## *Version Control*

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**CTMS USER GUIDE\_V\_1.7**

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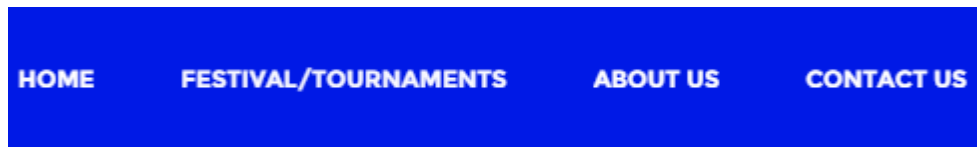
## What is CTMS:

CTMS is a new beginning of the way OSA and its partners handle and manage Competition and Travel permits. CTMS stands for "Competition and Travel Management System". It is built from ground up, has a better way of handling Competitions, Travel Permits, International Transfer Certificates and User Account Management.

## How to use CTMS:

1. Visit this link – <http://www.ontariosoccer.net/about/osa-news/742-ctms>
2. On this page, click the link – "Click here to continue to CTMS". This will redirect you to the CTMS website.
3. On this page, you will find following information.

- Menu



- Login/Register option



- OSA video with a link to find more information on the video playing
- Links to OSA Twitter, OSA Facebook, OSA Youtube channel



- Tournament List with dropdowns to further narrow down the selection

Tournament Type:

District:

- OSA Twitter Feed



- About Us



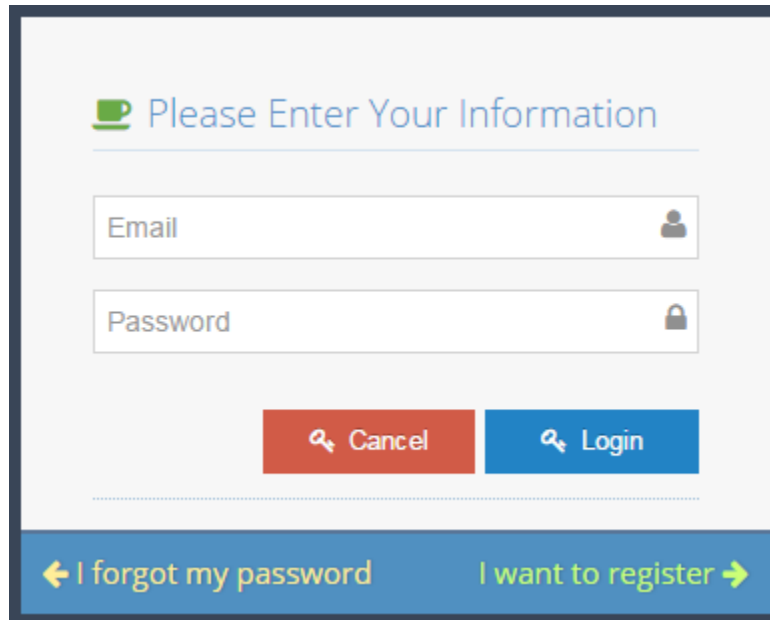
- The list of Festivals/Tournaments displays all the Festivals or Tournaments once they are approved and still are not expired, in chronological order, where latest Festival or Tournament based on its hosting date shows up at the top of the list.
- Menu comprises of these options:
  1. Home – Clicking on Home will bring back to the top of the page
  2. Festival/Tournaments – Will navigate you to the Festival/Tournament listing
  3. About Us – Will navigate you to the section of the page with more information about the OSA
  4. Contact Us – Will navigate you to the page with more information about getting help related to CTMS
- From the home page, user has an option to either Login or Register him/herself to be able to submit a new application, ATF/AHEG/FAF/TAF/ITC, manage their own account.

- If the user requires more information regarding the Tournament, user will be able to click on the "Tournament link" to see full information regarding the Tournament selected.
- If the user wishes to travel to the Tournament, he/she must login to submit an ATF.

## Login/User Account Setup/Registering a new User Account:

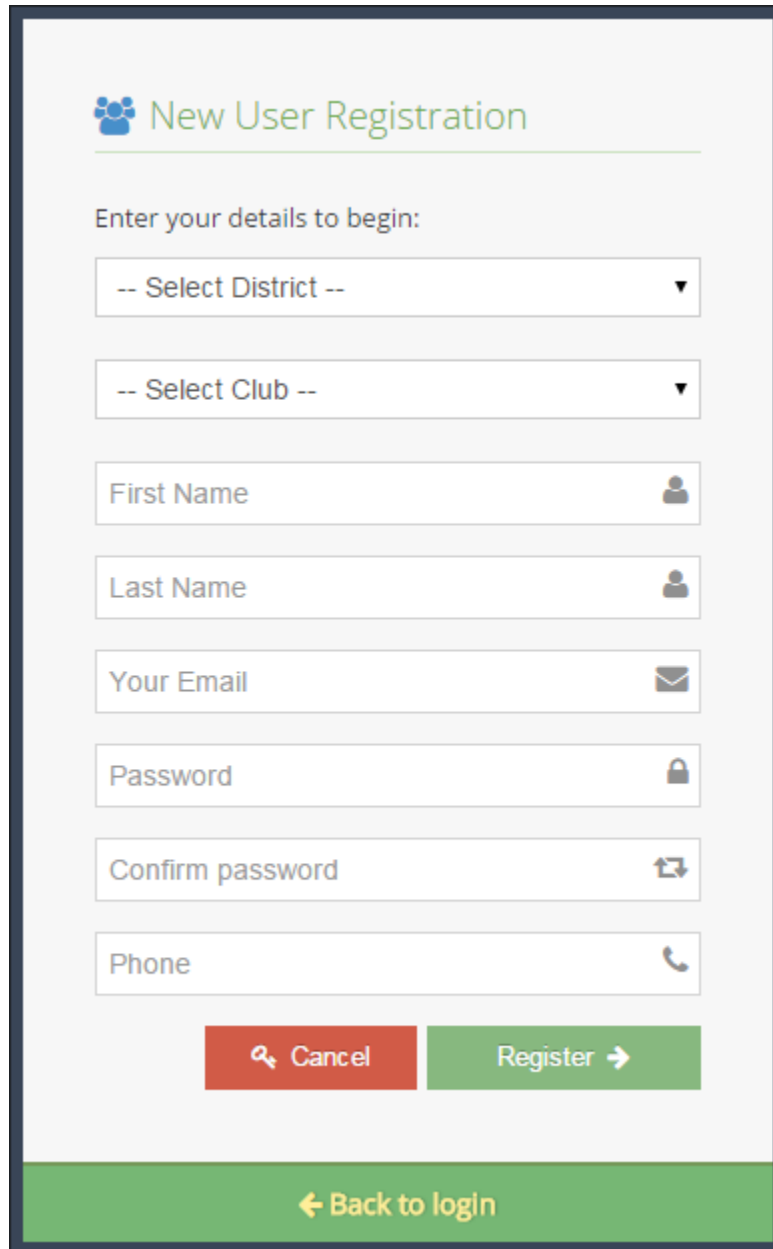
- To set up an account or to login with your existing account, click on Login/Register link at the top right corner of the page.
- Once you click the link, a new interface will appear on the screen.

### i) Login

A screenshot of a login form. At the top, there is a green speech bubble icon followed by the text "Please Enter Your Information". Below this, there are two input fields: "Email" with a person icon on the right, and "Password" with a lock icon on the right. Underneath the input fields are two buttons: a red "Cancel" button and a blue "Login" button. At the bottom of the form, there is a blue bar containing two links: "← I forgot my password" and "I want to register →".

- (1) If you already have an account, enter your email and password and click Login.
- (2) If you do not have an account, you can click on "I want to register".
- (3) If you forgot your password, you can reset your password by clicking on "I forgot my password".
- (4) If you want to cancel the login process, click "Cancel" and you will return to the homepage.

ii) Register



The image shows a mobile application interface for "New User Registration". At the top, there is a blue icon of three people and the text "New User Registration". Below this, the instruction "Enter your details to begin:" is displayed. The form consists of several input fields: two dropdown menus for "District" and "Club", followed by text input fields for "First Name", "Last Name", "Your Email", "Password", "Confirm password", and "Phone". Each text field has a corresponding icon (person, envelope, lock, refresh, and phone). At the bottom of the form, there are two buttons: a red "Cancel" button with a magnifying glass icon and a green "Register" button with a right-pointing arrow. Below the form is a green bar with a yellow left-pointing arrow and the text "Back to login".

- (1) To set up a new user account, you must first select the District from the list.
- (2) Once the district is selected, the Club list will populate and you can choose your Club from the list accordingly.
- (3) Fill in the rest of the information, all the fields are mandatory and you cannot set up the account by leaving any of the fields blank.

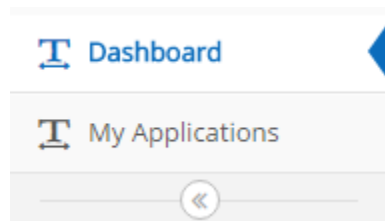
- (4) Once the form is complete, click "Register" and you will have an account in CTMS.
- (5) Your Email address is your Username.
- (6) When you login for the first time, your account is created by default as a Team Official.
- (7) Once the account is set up, you will have to inform the Administrator (See Notes) to change your account to the appropriate role.
- (8) Until your account's type is changed by the Administrator, you can still continue to work as a Team Official and submit applications but cannot approve any applications or set up accounts or any other activities in the CTMS.

#### NOTE:

- If you are an Administrator and require to upgrade your account type from a Team Official to a Club/District/OSA Administrator, you must contact an existing Administrator from your organization to make the necessary changes.
- If such an Administrator doesn't exist/doesn't have an account with such permissions, you must contact the next level Governing Organization. For example, if you are a Club Administrator, you must contact your District Administrator to give your account the correct permissions.

#### Landing Page:

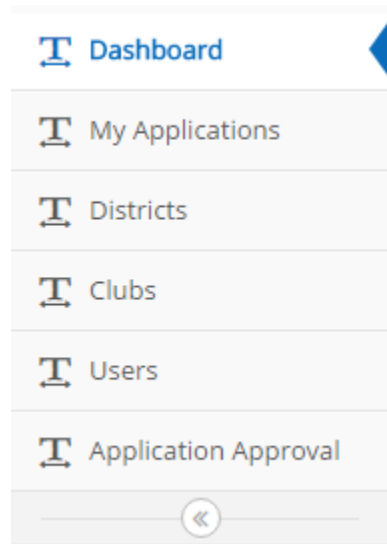
- Once you login, you will see 3 sections on the page (By default selection is Dashboard)
  - 1) Menu Panel
  - 2) Canvas Area
  - 3) User Account Management
- If you are logged in as a Team Official, you will see 2 choices in the Menu Panel (By default selection is Dashboard)
  - 1) Dashboard
  - 2) My Applications



- If you are logged in as a Club/District/OSA/CSA Admin, you will see up to 6 choices in the left panel
  - 1) Dashboard



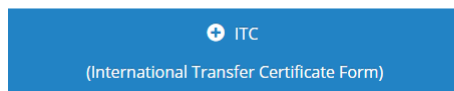
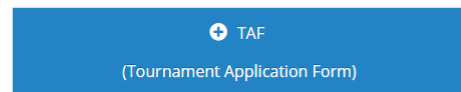
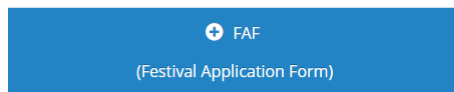
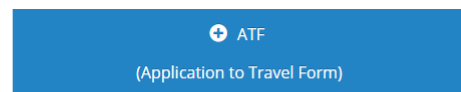
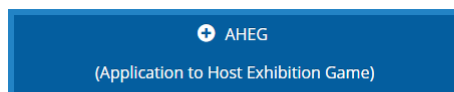
- 2) My Applications
- 3) Districts
- 4) Clubs
- 5) Users
- 6) Application Approval



## Menu Panel:

## Dashboard:

- The Dashboard consists of Application Forms and Festival/Tournament Listing (Approved and Current Festivals/Tournaments are listed, by default, Tournaments are selected)
- To submit an application, the procedure is consistent and simple.
  - 1) Once you log in, the Dashboard gives you 5 options to choose from - ATF, AHEG, TAF, FAF, ITC



- 2) Select the application type
- 3) Fill in the form (All the mandatory fields are marked with an asterisk \*)
- 4) Read the agreement and check the "Box"
- 5) Click "Save and Submit"



- 6) If you choose to not submit the application, click "Cancel"



- CTMS decides who will give a final approval by the selected "Jurisdiction" of an application

Jurisdiction \*

- Once the application is submitted, its status becomes "Pending"

Status

- Select Status --
- Pending
- Approved By Club
- Approved By District
- Rejected

- 1) Each application submitted must be approved by the Club Admin. Once the application is approved, the status changes to "Approved by Club"
- 2) If the application requires any further approval, it goes to the District Admin. And the application status changes to "Approved by District"
- 3) If the application requires any further approval, it goes to the OSA Admin. And the application status changes to "Approved by OSA"
- 4) If the application requires any further approval, it goes to the CSA Admin. And the application status changes to "Approved by CSA"

- At any of the approval levels, an Administrator may reject the application. The Administrator fills out the Notes section, changes the status of the application to Rejected and saves the application by clicking the "Save" button



- To start the process of applying to a Tournament from the Festival/Tournament list, follow the steps below:

1. Go to Dashboard (If logged in) or go to homepage (If not logged in)

2. Select the Festival/Tournament from the list, click the name of an Festival/Tournament you want to participate in
3. Click on "If you want to apply for an ATF, click here" link
4. If you are not logged in, you will be asked to login, if you are already logged in, you will be redirected to an "ATF-Application" form, which will be partially filled in with information from the Tournament selected on the home page
5. Fill in the rest of the information
6. Click "Save and Submit"
7. CTMS knows which application is to be approved by whom based on the "Jurisdiction" selected in the application
8. Each application submitted requires approval at least by a Club Admin, depending on jurisdiction selected, the application may require approval from higher authorities

## My Applications:

- The Applications section contains all the applications submitted by a user
- To view the list of the applications, select criteria from the filters
  - i) Application Type – Select an application type, ATF or AHEG or TAF or FAF or ITC
  - ii) Application Status – Select an application status, Pending, Approved by Club, Approved by District, Approved by OSA, or Approved by CSA, Rejected
  - iii) District
  - iv) Clubs – Clubs list will populate once one of the districts is selected
  - v) Jurisdiction – The Jurisdiction list changes with each application type. Once the Application type is selected, the dropdown will update accordingly
  - vi) Season
- "Application Type" is mandatory for search, all other criteria are not mandatory.
- After the search result is populated, if a new application needs to be submitted (Whichever application type is selected in the filter), the user can click on the "Add" button and proceed with the application submission process.

## Data Export:

- CTMS allows users to export a list of all the applications submitted.

- 1) To export a list of application, login first. Any user with an account in CTMS can do an export
- 2) Upon login, go to "My Applications"



- 3) Select the "Application Type", "Application Status" and other filters if you desire

A screenshot of the application filters in the CTMS interface. It shows two dropdown menus side-by-side. The first is labeled 'Application Type' and has 'AHEG' selected. The second is labeled 'Application Status' and has 'Pending' selected. Both dropdowns have a small downward arrow on the right side.

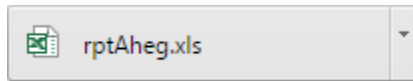
- 4) Click Search



- 5) CTMS will give you an option to "Export" above the search result



- 6) Click Export and a file will download as ".xls" file, which can be saved on local computer for further use

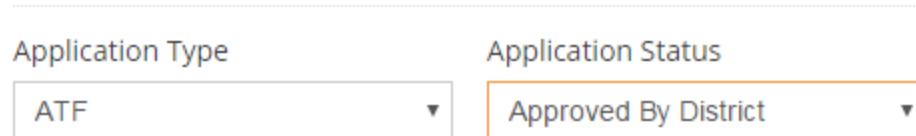


## Print an Application:

- Any approved application can be printed by the user
  - 1) To do so, login to CTMS
  - 2) Go to My Applications



- 3) Select the "Application Type", "Application Status" and other filters if you desire


A screenshot of the application filters in the CTMS interface. It shows two dropdown menus side-by-side. The first is labeled 'Application Type' and has 'ATF' selected. The second is labeled 'Application Status' and has 'Approved By District' selected. The second dropdown is highlighted with an orange border.

- 4) Click Search



- 5) CTMS will show a list of all the applications as searched

Display  records Search:

<input type="checkbox"/>	Application ID	District Name	Orginazation Name	Jurisdiction	Team Name	Status
<input type="checkbox"/> 	4	DT0005 - Durham Region SA	CD0502 - Ajax FC 0502	Within Ontario	Team Test ATF 1	Approved By District

Showing 1 to 1 of 1 entries << 1 >>

6) Click on the "Edit – Pencil" icon next to the application



7) Scroll down to the bottom of the application page

8) Click "Print"



9) A printable copy of the application will be generated, which can then be printed from any printer connected to a computer

### Note:

- Once an ATF is approved by the appropriate Governing Organization, an Applicant can print the ATF and submit it to the Festival/Tournament hosts

### Clubs:

- This section is a list of all clubs available under a District
- District Administrator can Add, Delete and Manage their clubs from here



- Clubs can be Added or Deleted by clicking "Add" or "Delete" button



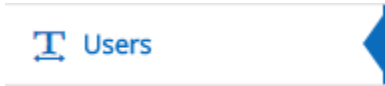
- Club information can be modified by clicking "Edit – Pencil" icon



- If the club is no longer operational, the District Administrator can edit the club information and change the club status to "Inactive"
- If a club is set in CTMS that should not exist, the club can be Deleted from the database

## Users:

- The Users section allows the Club Administrator to manage all the users his/her Club



- User accounts can be Added or Modified under this section by clicking the “Add” or “Edit – Pencil” icon



- In “Edit” mode, the Club Administrator can make changes to user’s credentials, reset password, update contact information or change user account status to “Inactive” if the user no longer works for the Club

## Application Approval:

- The application Approval process can be started by an Administrator by clicking the “Application Approval” section in the left hand panel.



- To view the list of the applications, please select criteria from the available dropdown filters.
  - i) Application Type – Select an application type, ATF or AHEG or TAF or FAF
  - ii) Application Status – Select an application status, Pending, Approved by Club, Approved by District, Approved by OSA, or Approved by CSA
  - iii) District
  - iv) Clubs – Clubs list will populate once one of the districts is selected
  - v) Jurisdiction – The jurisdiction list changes with each application type. Once the Application type is selected, the dropdown will update accordingly
  - vi) Season
- “Application Type” is mandatory for search, all other criteria are not mandatory.
- Once the application search result is populated, the Administrator can then click on the “Edit – Pencil” icon to open the application form.



- i) If any changes are required, the Administrator can make the changes here

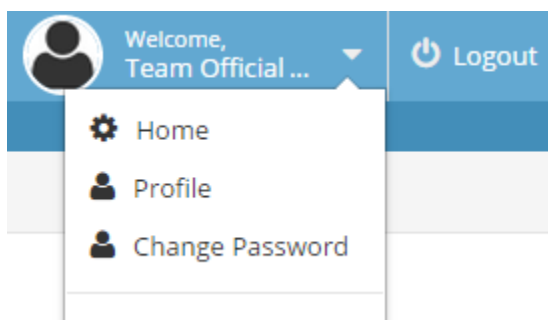
- ii) Change the status of the application from the dropdown from "Pending" to "Approved by\_Respective Administrator Type" or "Rejected"
- iii) Click the "Save"
- iv) Clicking on the "Save" button sends the application for further approval, if required, depending on the Jurisdiction type of the application
- v) After the application is approved by the final governing organization, the application now becomes available for the Applicant to view in their respective "My Applications" section
- vi) If the application is rejected by any of the governing organizations, they have an option to input "Notes" for the Applicant's reference
- If any changes are required, the Administrator can perform the changes as necessary
- If the application is rejected by any of the governing organizations
  - 1) The Applicant can resubmit the application by making a copy of the Original Application by clicking the Refresh icon below the Pencil icon of the Rejected Application



- 2) Doing this allows the CTMS to retain the original application with its original status and resubmits a new application

## Manage User Profile:

- Once the user completes creating a profile for him/herself, he/she can then manage his/her own profile
- The user can make changes to his/her profile by clicking on the down arrow at the top right corner
- By clicking on the name of the user logged in, the user would see 3 options:
  - 1) Home
  - 2) Profile
  - 3) Change Password



- By clicking on "Home", the user is taken back to the Dashboard
- To make changes to the user profile such as change address, phone # etc., the user should click "Profile" option
- In the "Profile" option, the user is greeted with this form



## Update Profile

District Name DT0005 - Durham Region SA

Organization Name CD0502 - Ajax FC 0502

First Name

Last Name

Email

Address1

Address2

Province

City

Postal Code

Country

Phone

Gender

Profile Image  No file chosen

Save

Cancel

- The User can fill in the rest of the information and click "Save" to save the changes

- To change the password, click on "Change Password"
  - 1) Enter "Current Password"
  - 2) Enter "New Password" and enter the same password in "Confirm Password"

**Change Password**

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Current Password

New Password

Confirm Password

**Change Password**

## Manage (Add/Remove/Edit) User Accounts:

- When a user account is created, by default the account is set up as a Team Official account.
- Once the account set up is complete, the user then must contact his/her respective organization or his/her governing organization to get the account type changed

**For example:**

- i) If the user is a Club Admin, he/she must contact another Club Admin from the same organization or his/her respective District Admin to give them access as a "Club Admin"
- To edit the account type
    - 1) Click the "Users" option in the Menu Panel



- 2) Click the "Edit" or "Pencil" icon



- 3) Change the account type as required

User Type

- Please Select --
- Team Official/Coach
- Club Administrator

4) Click "Save"



- The user account can also be set up by an Admin for their own respective organization/s if required.



**For example:**

- i) If an account is required for a CSA Admin, an OSA Admin can set up an account on their behalf if the OSA Admin possesses all the required information to set up an account.
- ii) If an account is required for an OSA Admin, an OSA Admin can set up an account on their behalf if the OSA Admin possesses all the required information to set up an account.
- iii) If an account is required for a District Admin, an OSA Admin or a District Admin can set up an account on their behalf if the OSA Admin or the District Admin possesses all the required information to set up an account.
- iv) If an account is required for a Club Admin, an OSA Admin or a District Admin or a Club Admin can set up an account on their behalf if they possess all the required information to set up an account.
- v) If an account is required for a Team Official, an OSA Admin or a District Admin or a Club Admin can set up an account on their behalf if they possess all the required information to set up an account.

	OSA_User	CSA_User	District_User	Club_User	Team Official_User
OSA_Admin	✓	✓	✓	✓	✓
CSA_Admin		✓			
District_Admin			✓	✓	✓
Club_Admin				✓	✓
Team Official_Admin					✓