

IPU Registration System – Administration Manual [\(Manual Registration System.docx\)](#)

The purpose of this document is to provide a reference for the administrative functionalities available in the IPU Registration System (<http://w3.ipu.org/registration/index.php>). All the functionalities henceforth assume that a user with administrative permissions is logged into the system.

Assembly registration system

Managing assemblies

Each IPU assembly requires the creation of an assembly instance with the registration system. Each assembly instance contains all the participant information related to the respective assembly. There are several key functionalities to manage these instances.

Creating an assembly

Before the start of an assembly, an assembly instance must be created in the system. To do so:

1. Go to *Admin Module Home* (<http://w3.ipu.org/registration/index.php/admin>).
2. Click on *Set up an Assembly*.
3. Enter the information the applies to the assembly and click on *Save*.

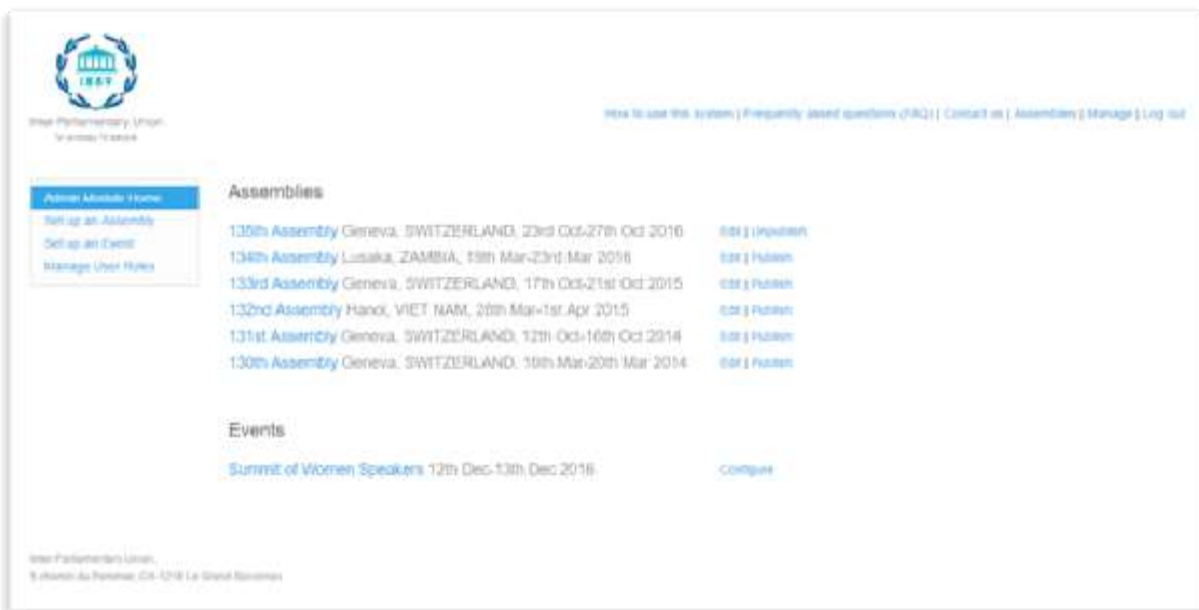


Figure 1 Admin Module Home

Publishing/Unpublishing

Once the assembly is set up, it must be published so that external users will be able to register to it. To do so, simply go to *Admin Module Home*, look for the assembly to be published and click on *Publish*.

Once the registration period for the assembly has passed, the assembly must be unpublished or else users will continue to be able to register or edit their participants. To do so, simply repeat the previous step but click on *Unpublish* on the still-published assembly.

Editing assembly-related information

To edit any information entered during the creation of the assembly, go to *Admin Module Home*, look for the assembly whose information is to be edited, click on *Edit*. The edit page for that assembly will then be shown. There, enter the desired information and click on *Save Edits* once finished.

From the same screen, an assembly can also be deleted. This will delete all information contained in the assembly, including all participants registered in the assembly. To do so, simply click on *Delete*.

Managing an assembly

An assembly that is open for registrations will contain registrations that are constantly being added or updated by external users. This will require the attention and management of an administrator to make sure that only valid and correct registrations are entered in the assembly.

To manage an assembly, click on an assembly from the *Admin Module Home*. This will then lead to the sub-area for the assembly.

Managing registrations (i.e. validation of registrations)

Validating registrations ensures that only the right registrations end up being included in the final set of delegations attending an assembly. There are several actions involved in validating a registration:

Viewing all registrations

To see all registrations for an assembly, click on *Manage Registrations*. This will bring up all the registrations grouped by registration status.

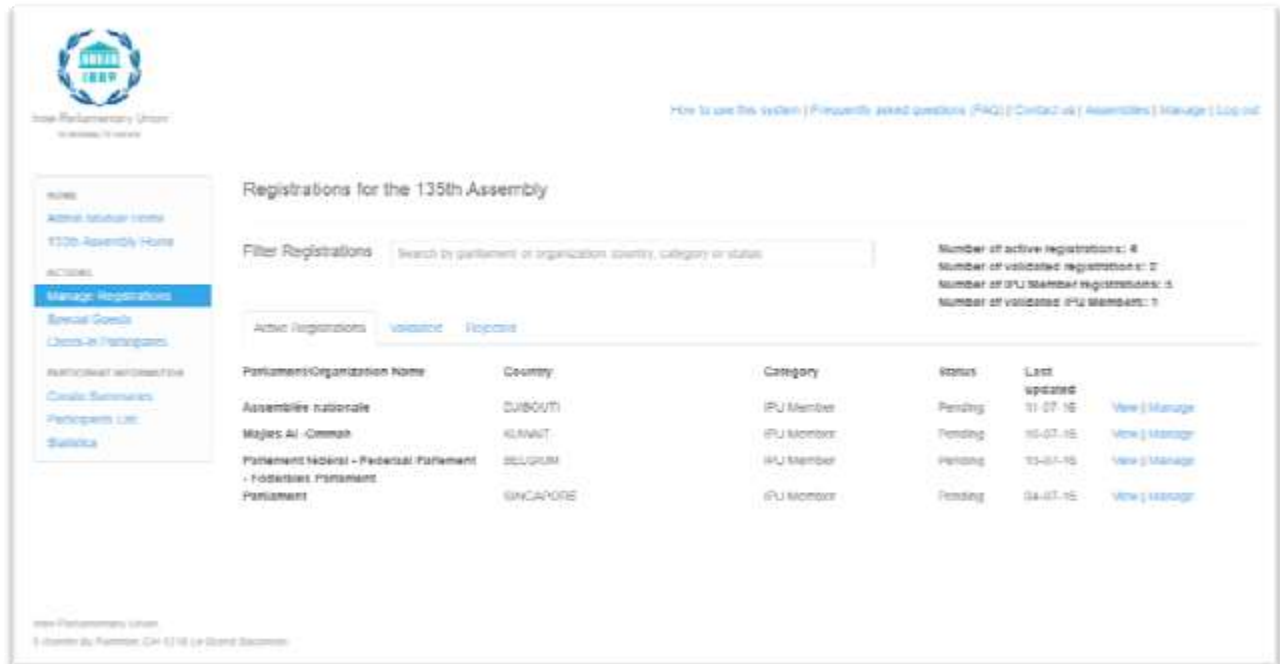


Figure 2 Manage Registrations page

The following are the status types applicable to registrations:

- *Pending* – No actions have been carried out by an administrator to the registration.
- *Follow-up required* – An administrator has determined that information in the registration is incomplete, incorrect or must be updated.
- *Validated* – The registration has been accepted by an administrator.
- *Rejected* – The registration has not been accepted by an administrator.

Managing a registration

To manage a registration, select a parliament/organization among the registrations in *Manage Registrations* by clicking on the *Manage* link for the chosen parliament/organization. This will lead to the admin summary page for the chosen registration.

This page contains various functionalities related to the management of a registration as described

The screenshot shows a web application interface for managing registrations for the 135th Assembly of Djibouti. The interface is divided into several sections:

- Header:** "135th Assembly: Assemblée nationale (DJIBOUTI) view registration"
- Left Sidebar:** Contains navigation links such as "Admin Module Home", "135th Assembly Home", "Manage Registrations", "Special Guests", "Check-in Participants", "PARTICIPANT INFORMATION", "Create Summaries", "Participants List", and "Statistics".
- Main Content Area:**
 - Registered participants:** A table with columns: Name, Title/function in Parliament/Organization, and Title or function within the IPU. It lists three participants: Mr. ALI MOHAMED DAOUID (Leader of Delegation), Mrs. DEKA AHMED ELMI, and Mr. HASSAN SAID GOUANEH.
 - Status:** A section showing the current status as "Pending" and a "Validate Registration" button.
 - Delegation info:** Shows "Number of participants: 5" and "Number of MPs: 3". It also lists the registrant: "DAOUD YOUSSEUF MOHAMED (Male)" with contact details and registration dates.
 - Buttons:** "View/Edit Registration" and "Edit Multiple Participants".
 - Translations:** Shows "Translations pending: 2" and an "Add/Edit Translations" button.
 - Notes:** A section with an "Add this note" button and tabs for "Notes", "Emails", and "Special Needs".
 - Latest updates:** A summary of recent actions, such as "11 Jul 2016 07:18: DAOUD YOUSSEUF M. started registrations for Assemblée nationale (DJIBOUTI)".

below:

1. Summary of registered participants in the parliament/organization
2. Current status of the registration. When the *Validate Registration* button is clicked, an administrator will then be able to set the status of the registration. When doing this, an optional email message may be included to notify the registrant of their registration status.
3. Various information about the registration and the user who made the registration.
4. Button that leads to the page where the registration was made.
5. Button that leads to page where information in the registration may be edited more easily than going to the registration page that is linked from (4).
6. An estimate of the translations that have yet to be made. The *Add/Edit Translations* button leads to a page where translations can be managed. Similar terminology that exists across parliaments/organizations are translated automatically.
7. Notes can be added and can be seen by all administrators in the system. All administrators may likewise see all the notification emails that have been sent to the registrant and any special needs that the registrant has specified.
8. A summary of the latest actions performed by the registrant concerning their registration

Extracting information from an assembly

Types of information that can be extracted

The registration system is capable of producing automated lists and reports for each assembly. The following are available:

1. Participants list – a Word file that is commonly used as the basis for the final list of participants in the assembly
2. Excel file of participants – may be produced through the *Create Summaries* link. Various options and filters are available in this page to help extract more precise participant information.
3. Statistics – a page containing the registration statistics of the assembly. May also be exported into an Excel file.

Synchronizing participant emails with MailChimp

Integration with the IPU MailChimp account has been included so that participant emails are synchronized from the registration system to the MailChimp account with the click of a button.

Managing users

The registration system contains hundreds of users of different account types. An administrator may sometimes wish to modify information related to a user account, or modify a user category or role.

Accessing a user account page

From the *Admin Module Home*, click on the *Manage User Roles* link. This will lead to a page that contains all of the users in the registration system. Click on the parliament/organization name of a user to access a page with their account information and list of all the assemblies a user has registered to. Likewise, the information about the user may also be edited from this page.

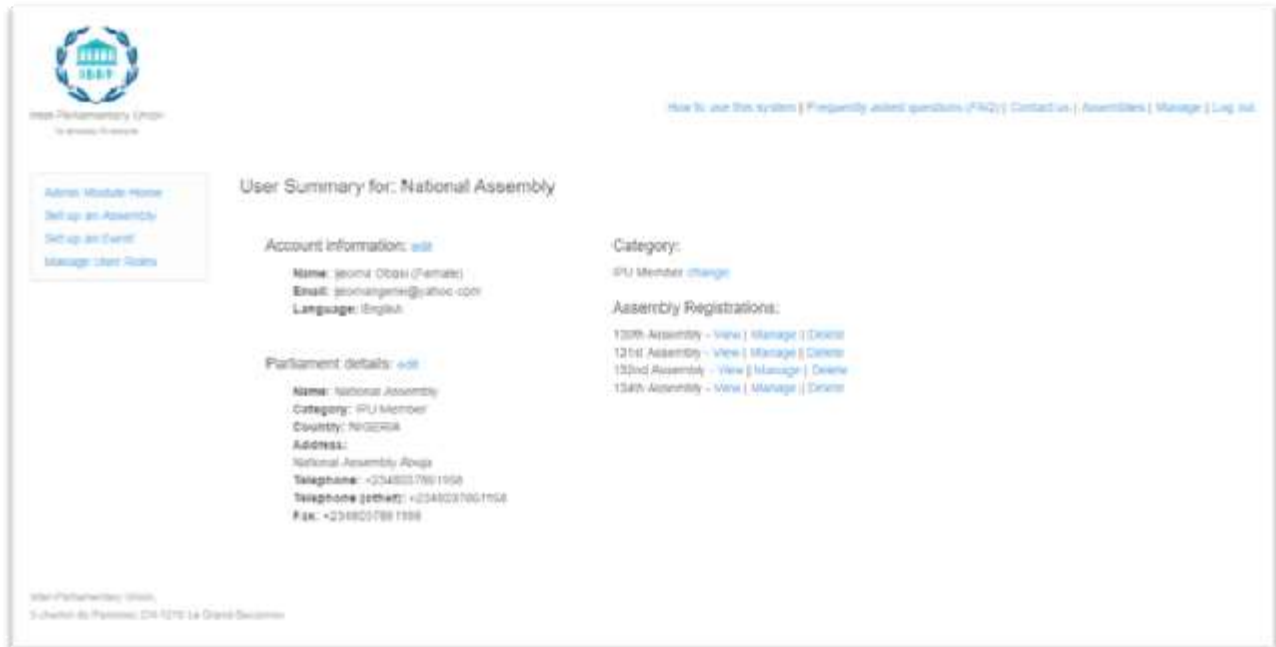


Figure 3 A user account page

Changing the user category

The user's category refers to the type of organization a user belongs to (i.e. IPU member, Associate member, Permanent observer, Media, Other) and determines which kinds of information they will be able to enter when registering for an assembly. Sometimes an administrator may wish to change this – for instance, when a user created an account of the wrong category and is thus unable to correctly register for an assembly.

To change a user category, simply click on the *change* link under category on the user account page.

Note: Changing a user category deletes all the data a user has entered for assemblies, except for a few cases.

Setting the user role

The registration system is comprised of users with roles having different permission settings:

- *User* – may only register for assemblies and view their own information
- *Super-user* – may view all registrations but not modify them
- *Administrator* – may view all registrations and modify them

To set the role of a user:

1. Go to the *Manage User Roles* page
2. Choose the user whose role is to be modified and select the role to be applied from the select box at the end of the row
3. Click on the *Update* button at the bottom of the page.

FAQs/Common issues

A user is not able to log into his account

This commonly happens when a user has forgotten their account or is not aware whether an account in their name exists in the first place. To solve this issue, check first if the user account exists by going to the *Manage User Roles* page and verifying the account.

If the account exists, there are two options:

- Direct the user to the *password reset* page: <http://w3.ipu.org/registration/index.php/password/remind/en> , or
- Directly reset the password of the user in the user's account settings page (that is, reset the password to a temporary one) and advise the user to immediately reset their password once logged in.

Browser-related issues

There may be users who are using outdated browsers and are thus not able to make use of the functionality of the registration system. In such cases, please advise the user to make use of the latest browser versions.

A user registered with the wrong category

When external users register with a wrong category (e.g. registers as a permanent observer when it should be IPU member), their category must be.

Once the category has been changed, the following will take place to data that the user might have already entered:

- If the change is from Associate member to IPU Member or vice versa, the system will keep the user's participant data and update accordingly; otherwise
- The user's participants data will be deleted

In either case, the administrator must contact the user and ask that information either be re-entered or updated as the existing data might no longer be accurate due to the automated changes made by the system.

A user registered with the wrong country

Once again, this can be solved by updating the user's information. In certain cases, should the correct country's parliamentary structure not be the same as the initial registration (i.e. unicameral instead of bicameral), the system will have to make changes to participant data. Necessary updates to the participant data must be then be made by the administrator or by the user.

A delegation cancels its participation in an Assembly

For statistical purposes, the administrator must cancel the user's registration for a particular assembly by going to the user information page and clicking on Delete for that assembly.

A user registered a participant with the wrong participant type

To resolve this, either the user or the administrator deletes the participant with the wrong participant type and adds it again with the correct participant information.

The same delegation is registered by multiple users

Although not ideal, the system still allows multiple registrations for the same delegation. The statistics page for an Assembly aggregates the information for each IPU member regardless of how many registrations there are. The only downside is that when the automated participants list is produced, the delegation for which there are multiple registrations must be edited manually to make sure that all the information for that delegation appears under one heading.