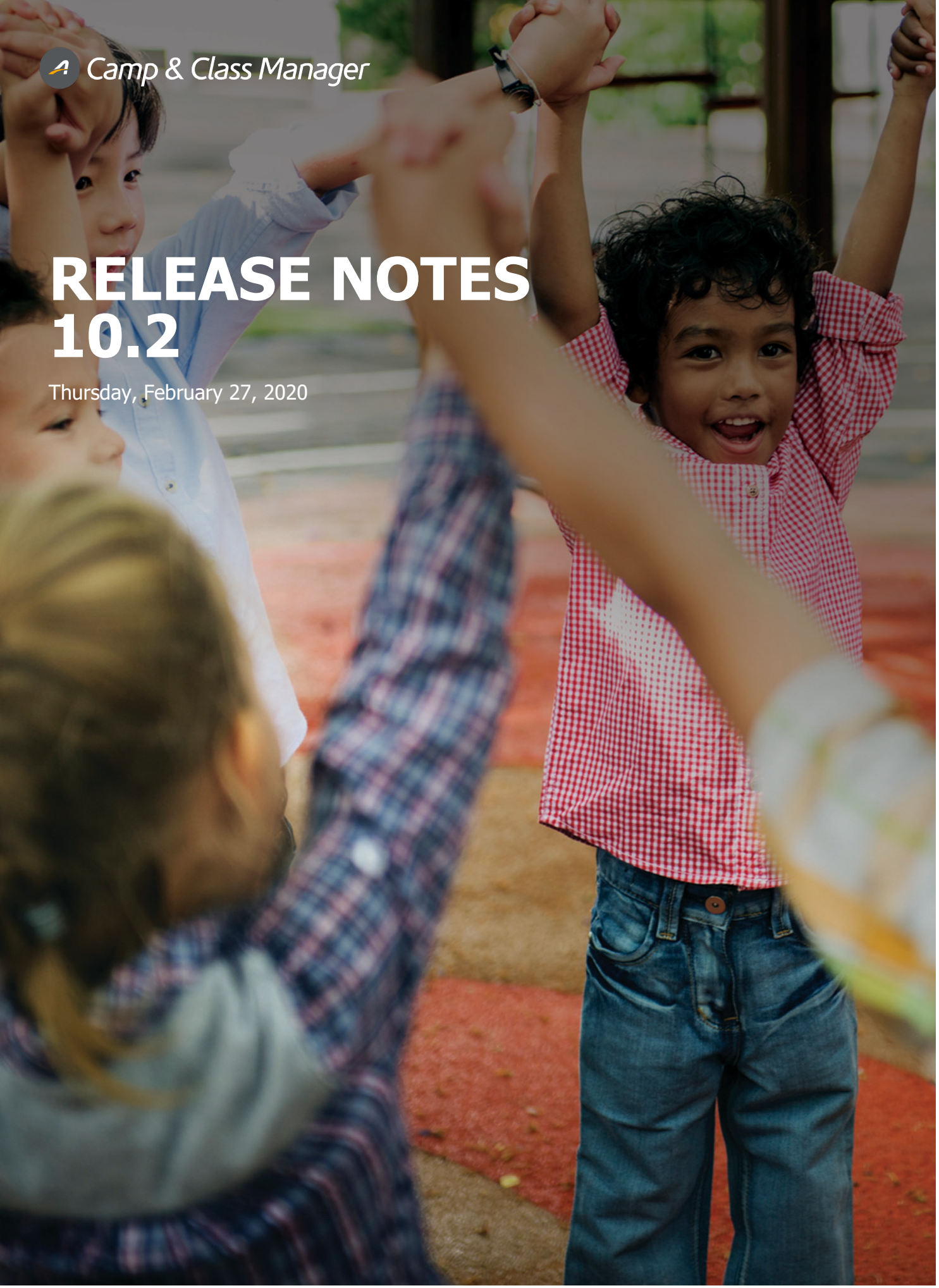

Camp & Class Manager

RELEASE NOTES 10.2

Thursday, February 27, 2020

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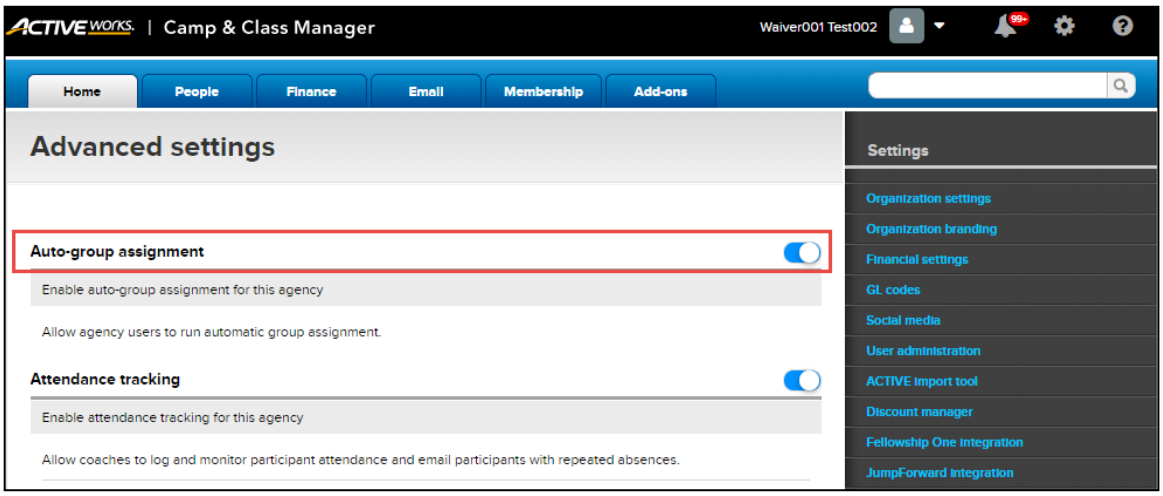
Automated Group Assignment

To allow agencies to automate the process of assigning registrants to multiple activities based on user preference, time slot and group availability, a new **Auto-group assignment** feature has been implemented.

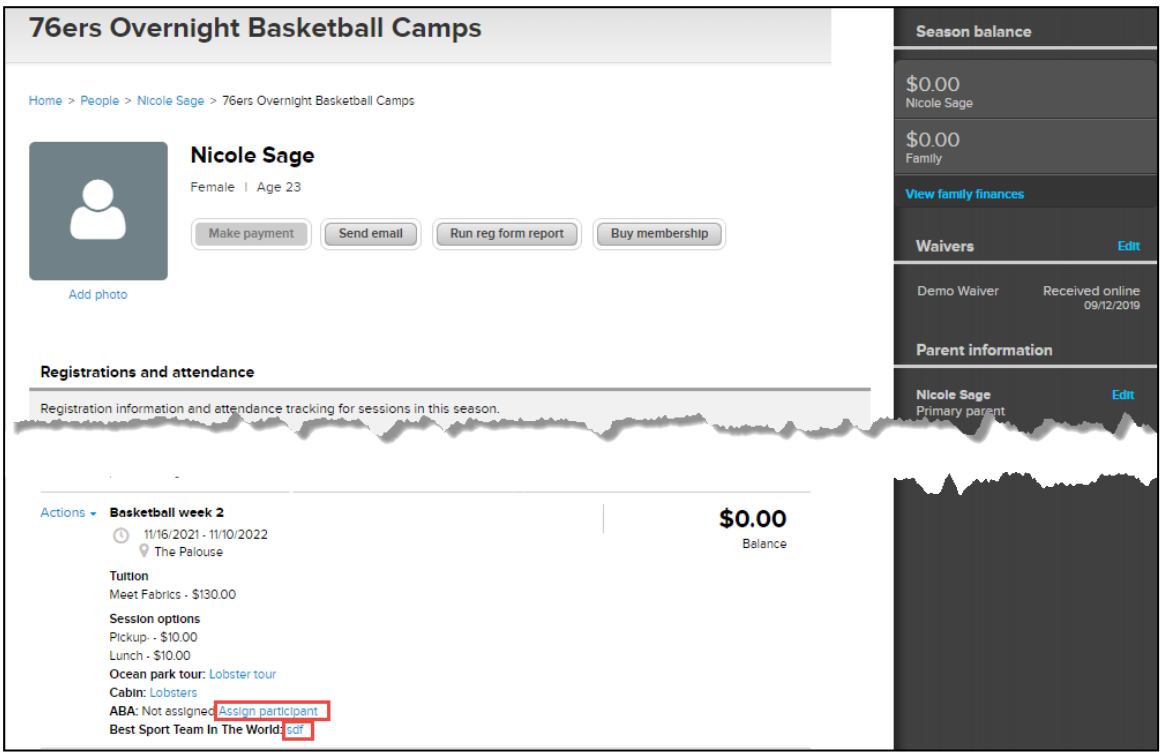
Admin Site: Enabling the Auto-group Assignment Feature

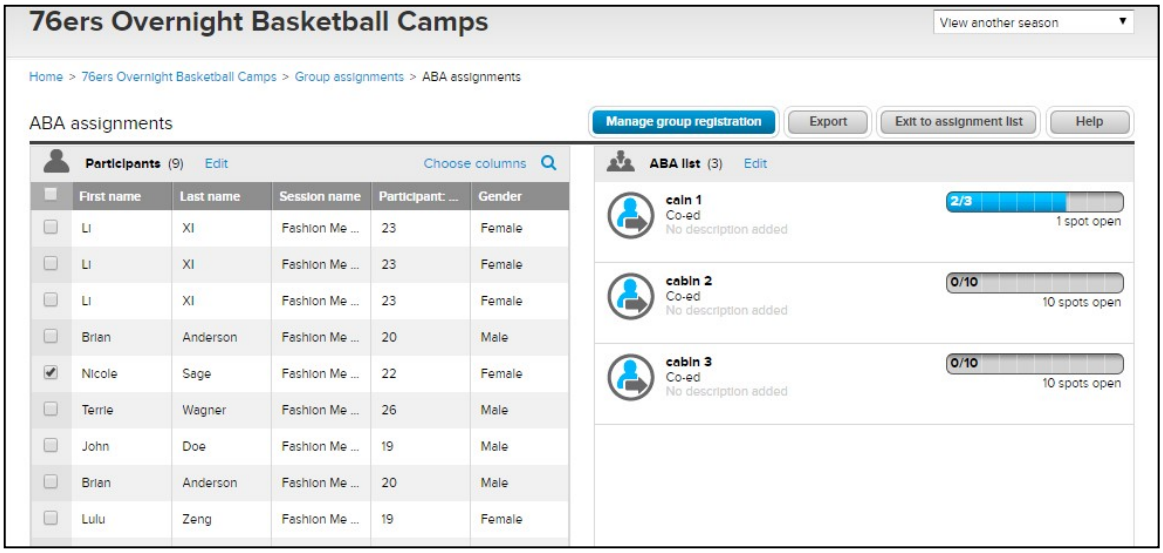
ACTIVE users can enable this feature by clicking the Admin Site > **Settings** (Gear icon) > **Advanced settings** > **Auto-group assignment** toggle switch (defaults to OFF):



Note:

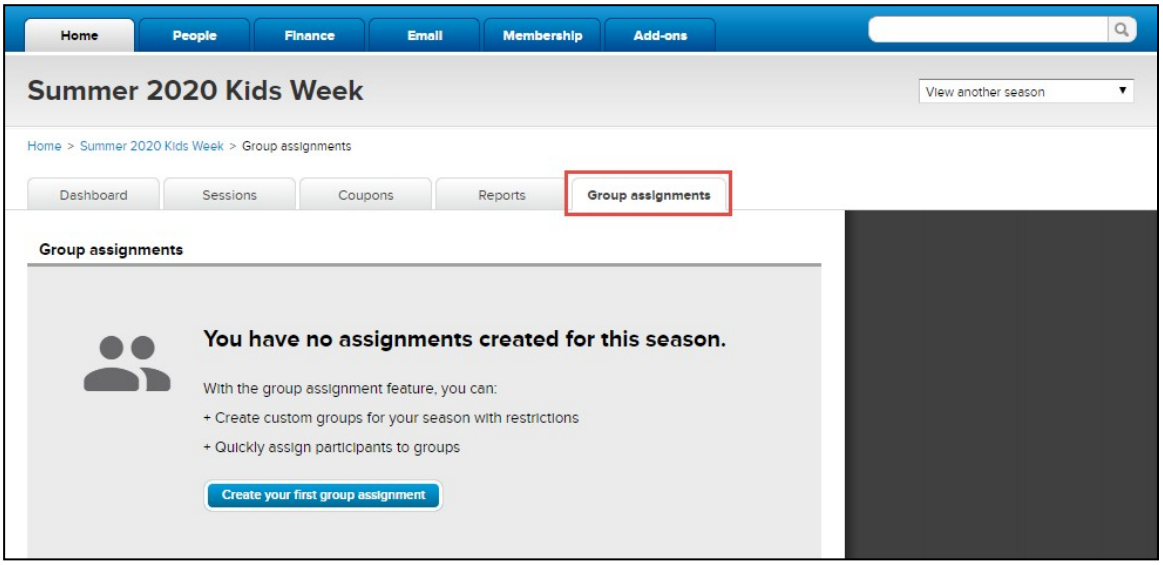
- The new **Auto-group assignment** feature supports USA Hockey memberships.
- For agencies that wish to continue to use the existing **Group assignments** feature, leave the **Auto-group assignment** setting to OFF.
- For agencies that have old group assignments configured for a season using the existing **Group assignments** feature, enabling the new **Auto-group assignment** feature has the following impacts:
    - In the registration view (Admin Site > **Home** > a season > a participant > **Registrations and attendance** section), the **Assign participant** link (if the participant has not been assigned) or assigned-group link (if the participant has been assigned) is displayed, which opens the existing **Group assignments** page:



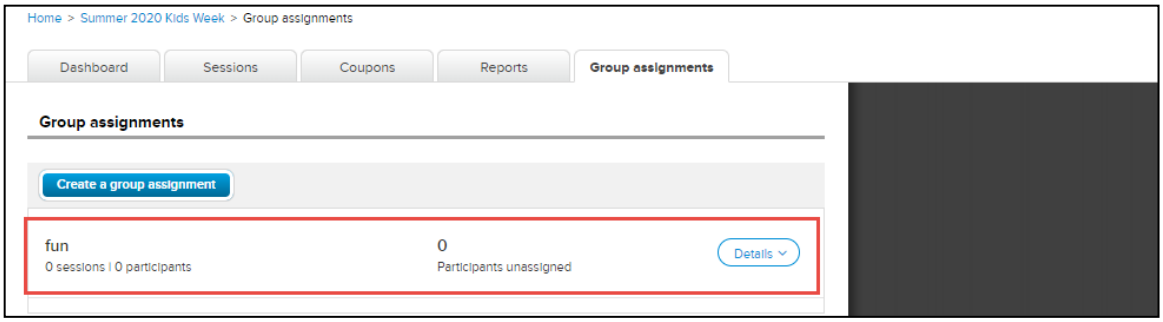


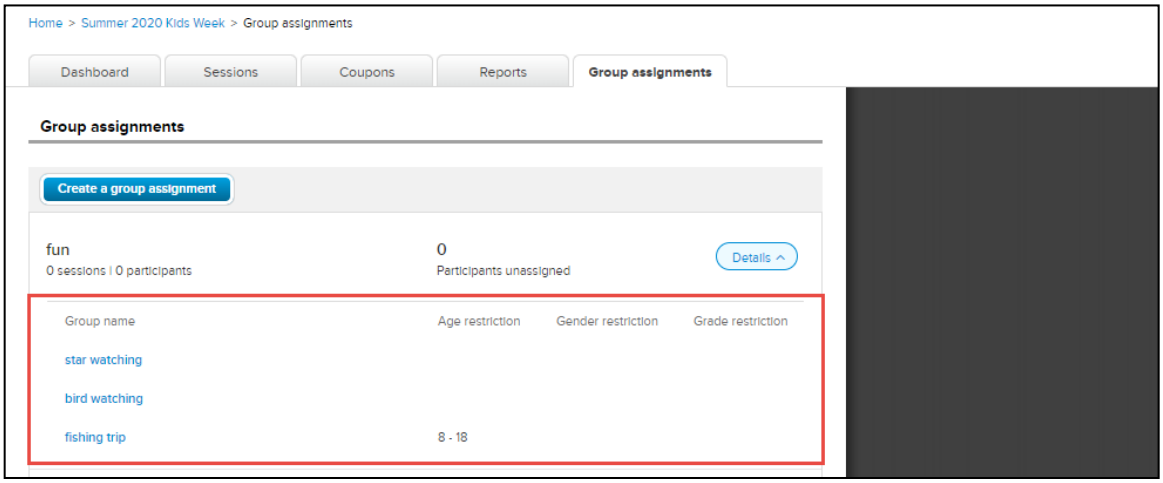
- The Admin Site > **Home** > a season > **Reports** > **New custom report** or **Registration form report** > **Group assignment** column is populated with the old group assignment information (if there was no assignment, then the column is displayed as blank).
- The Admin Site > **Home** > a season > **Reports** > **Check-In report** > **Assignments** column is populated with the old group assignment information (if there was no assignment, then the column is displayed as blank).
- In confirmation emails (Admin Site > **Home** > a season > **Setup** > **Confirmation email**) and broadcast emails (Admin Site > **Email** > **New**), if the **Group Assignment** merge field has been added, then in the sent email, the field is populated with the old group assignment information (if there was no assignment, then the field is displayed as blank).

Once the **Auto-group assignment** feature is enabled, the new Admin Site > **Home** > a season > automated **Group assignment** feature is activated (the screenshot below shows when no groups have been created for this season):



If group assignments already exist for this season, then they are listed under the **Group assignments** tab. Agency users can view details of each group type (including associated sessions, groups in the same group type and assignment details) by clicking anywhere in the group-type header area:



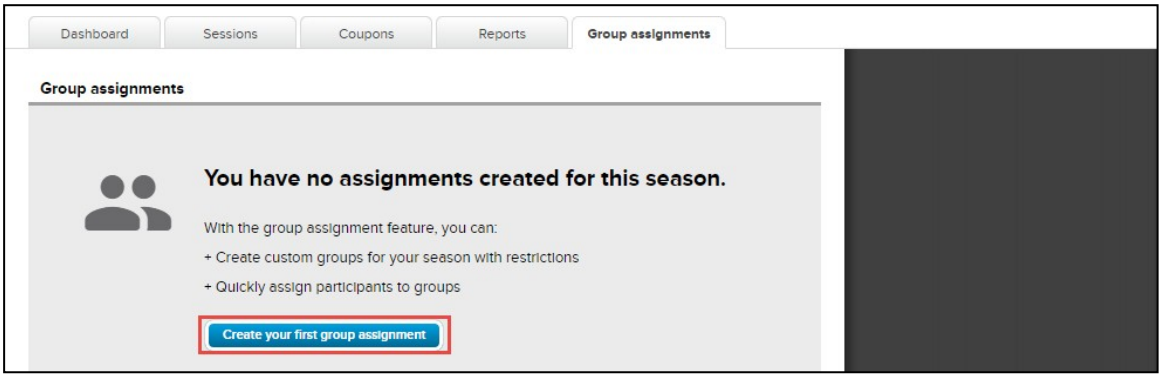


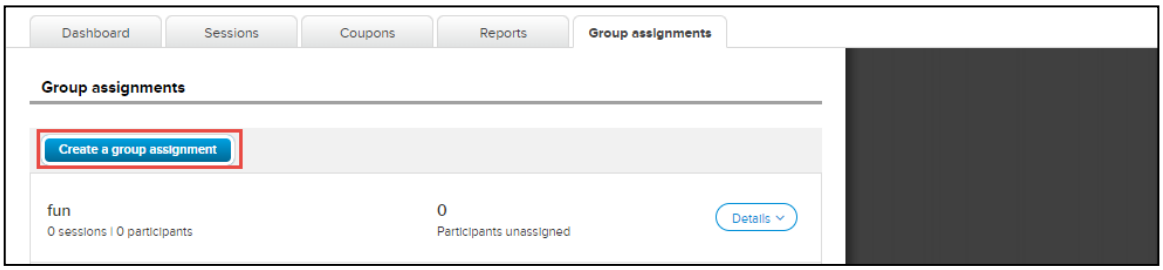
Admin Site: Setting Up and Managing Group Assignments

Setting Up and Managing Group Assignments

Agency users can create a new group assignment by clicking **Group assignment** > **Create your first group assignment**

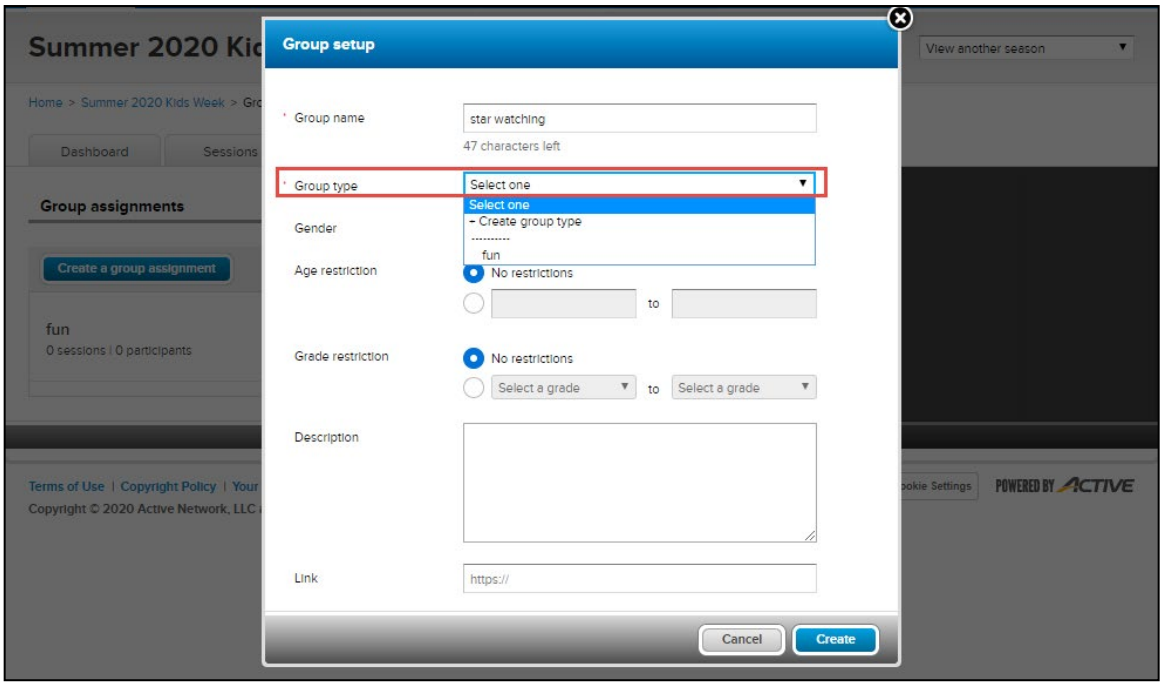
(if no assignments exist) or **Create a group assignment** (if assignments already exist):



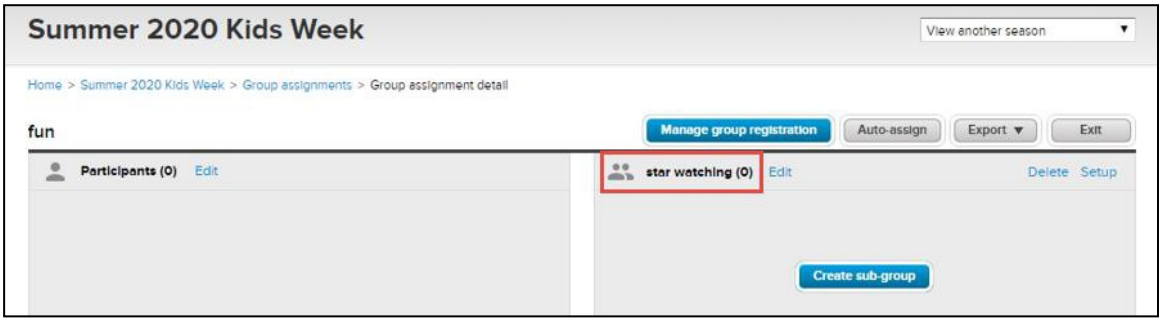


On the **Group setup** popup, agency users:

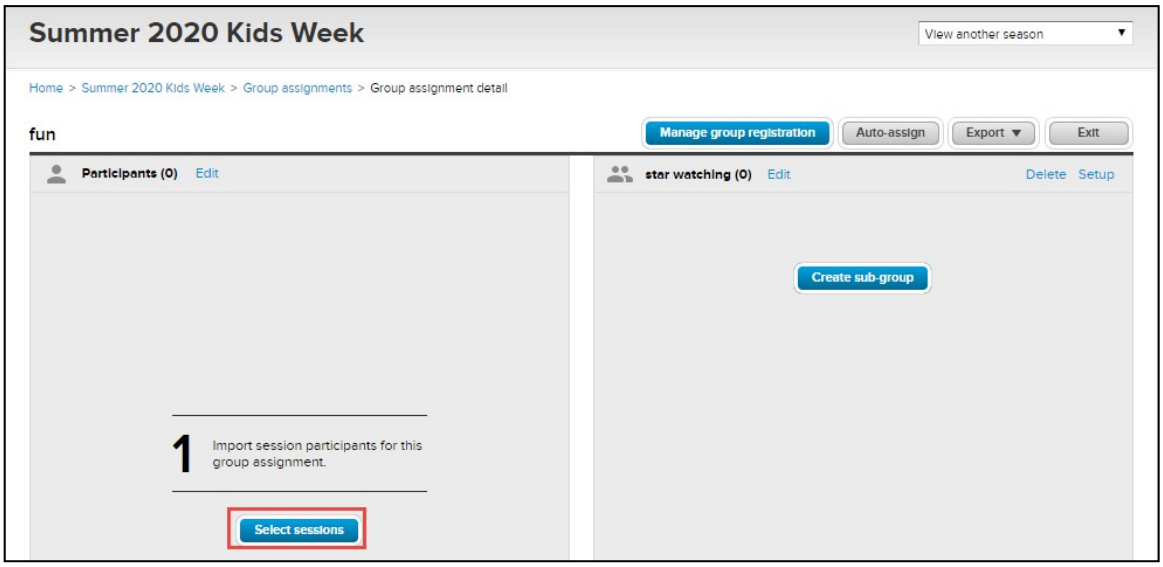
- must select an existing group type (or create a new type) for this group by clicking the **Group type** dropdown. Groups of the same group type are listed together (note: group type names in the same season must be unique).
- can set up the group-level **Gender**, **Age restriction** or **Grade restriction** for this group.
- can enter custom **Description** for this group that is to be displayed in the CUI.
- enter a **Link** for this group (supported protocols: http, https and ftp). For example, a video link to embed a video in the CUI that is to be displayed with the custom **Description**.

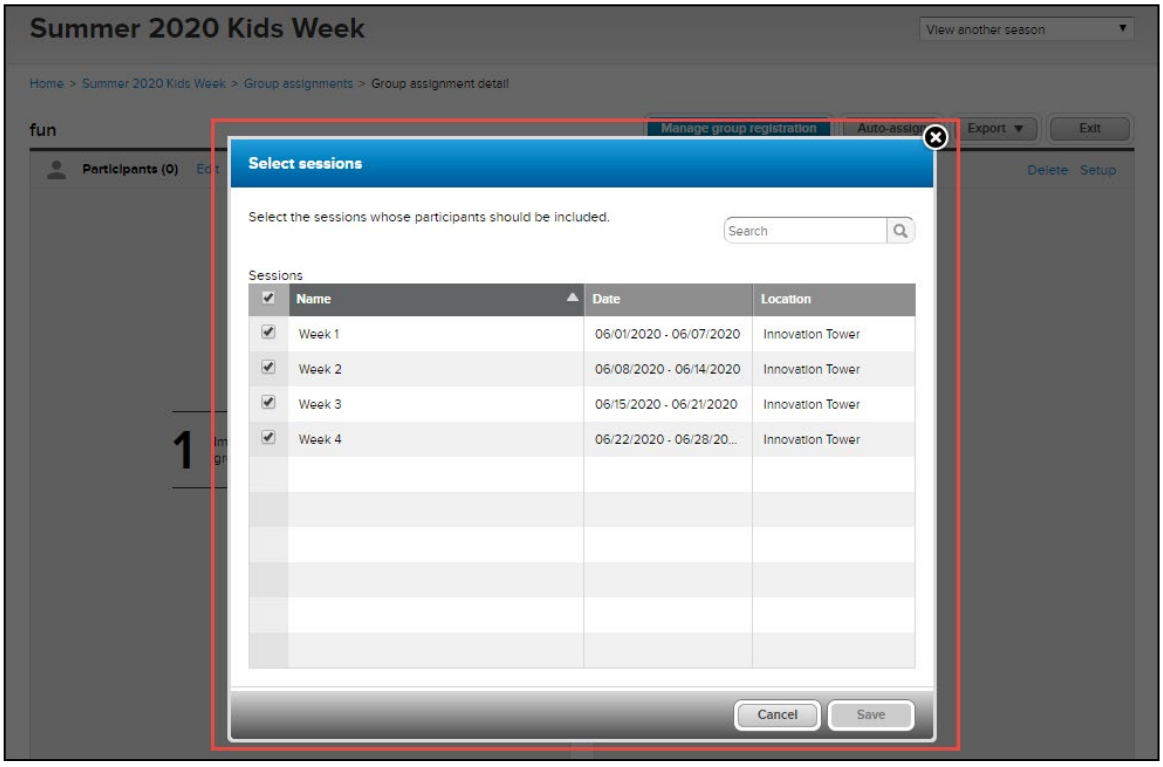


After a group has been created, it is then listed on the group type page to which it belongs (users can also access this page by clicking the required season > **Group assignments** tab > the required group type > a group):

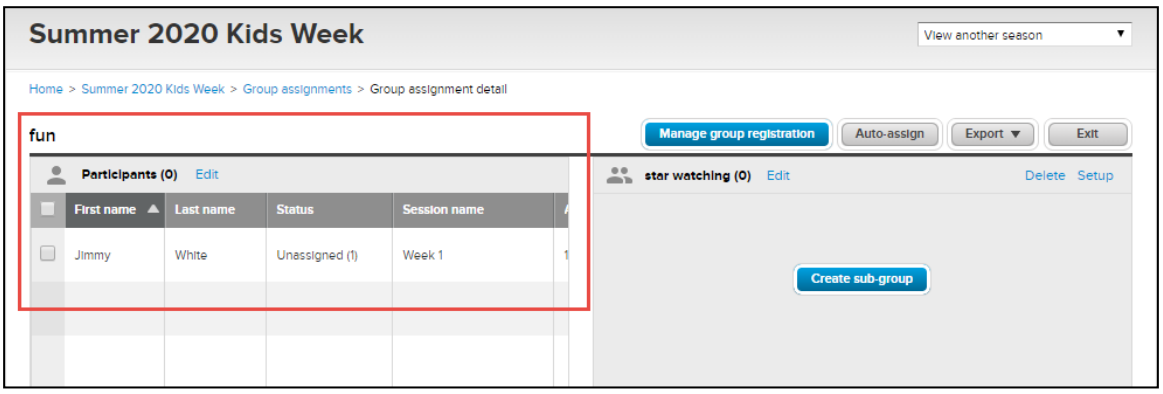


Agency users can add this season's sessions to this group type by clicking the **Select sessions** button and then selecting the required sessions:

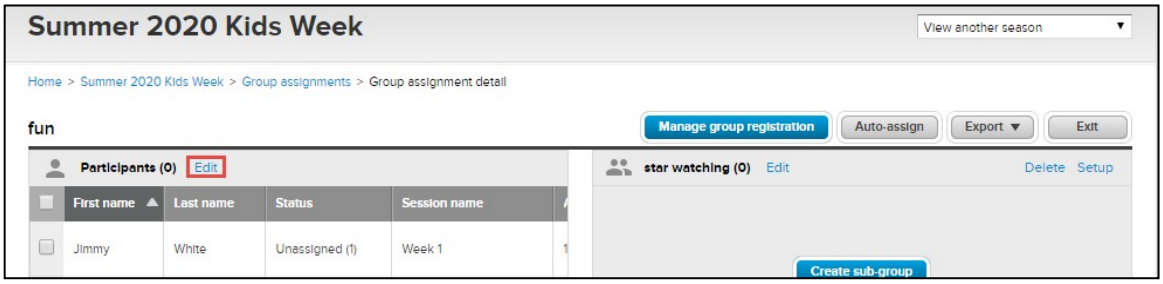


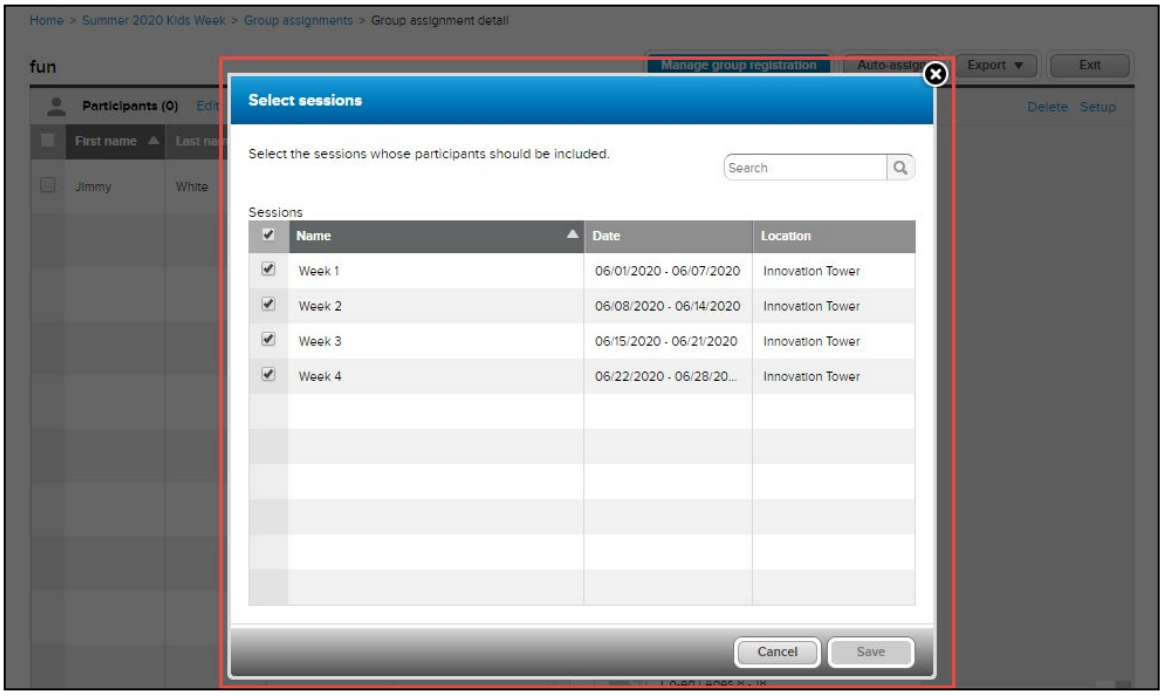


Registrants (if any) of the selected sessions are then listed in the **Participants** section:

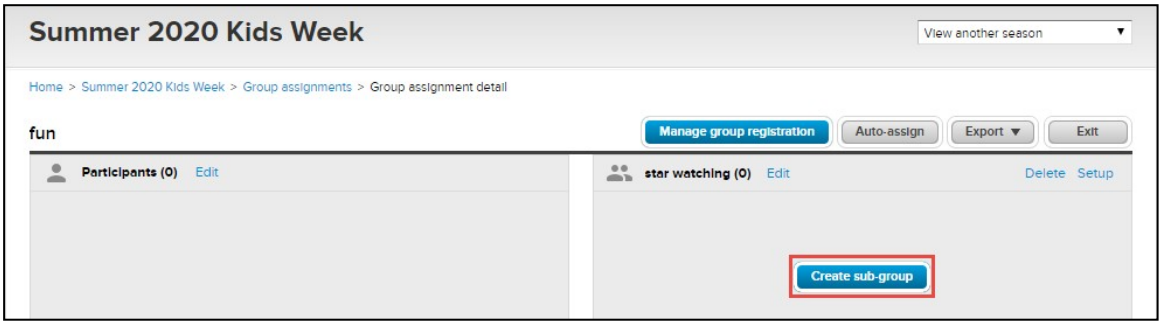


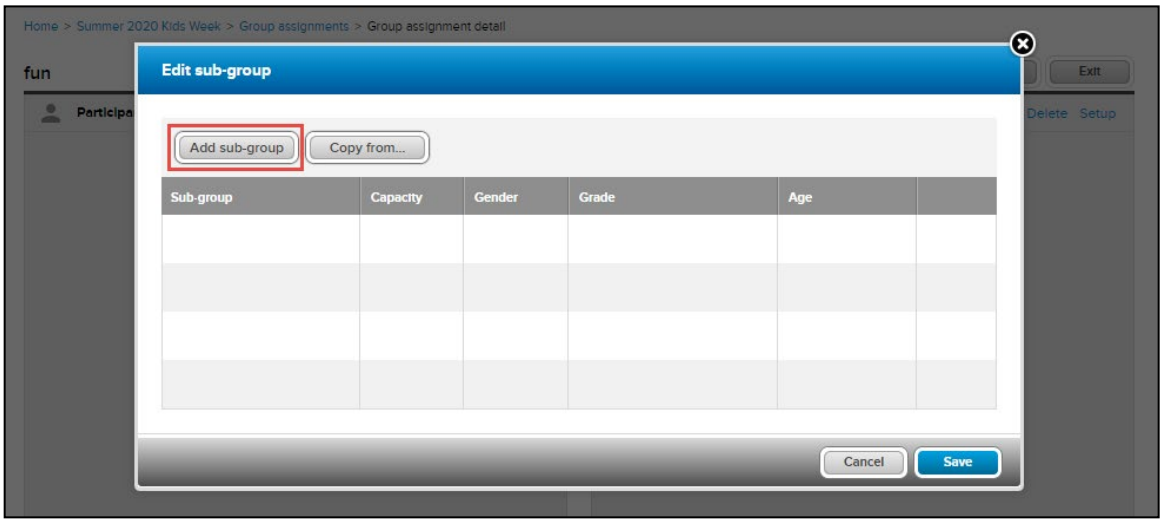
Agency users can later add or remove sessions by clicking **Participants** > **Edit** and then making the required changes on the **Select sessions** popup (note: when removing sessions from a group type, any participants that have been assigned to its groups will be removed from the group assignments):

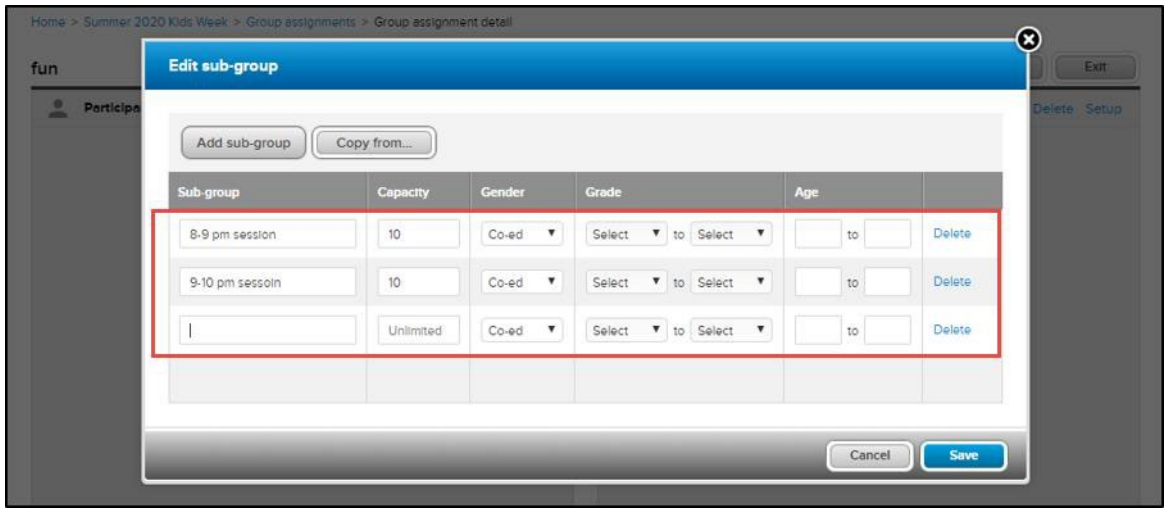




Agency users can divide a group by time slot, age or other factors by clicking **Create sub-group** > **Add sub-group** to create sub-groups under this group:



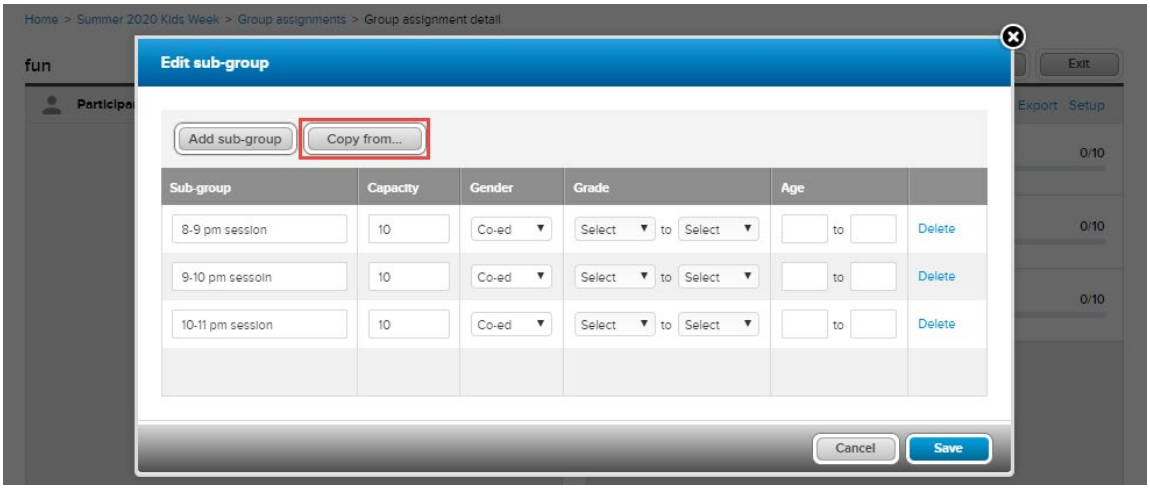


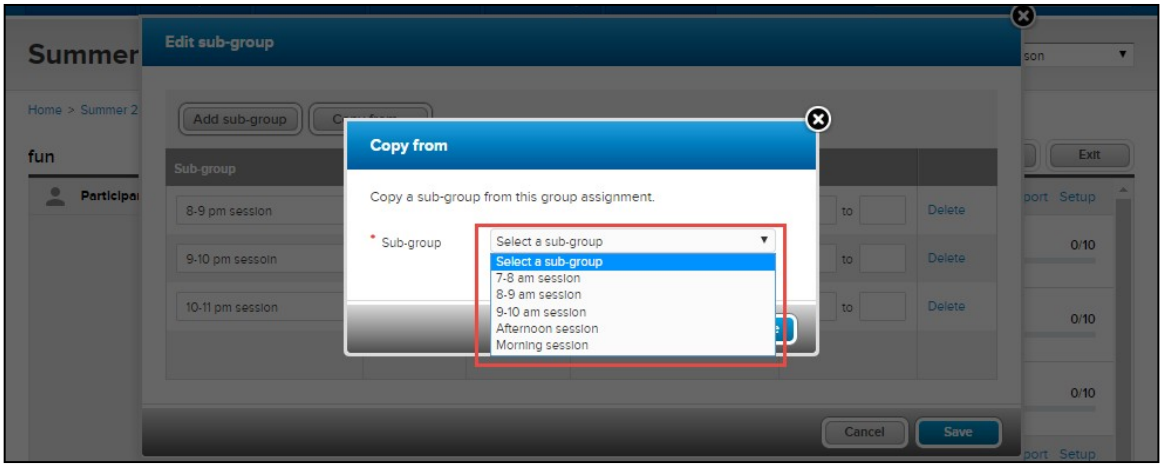


Note:

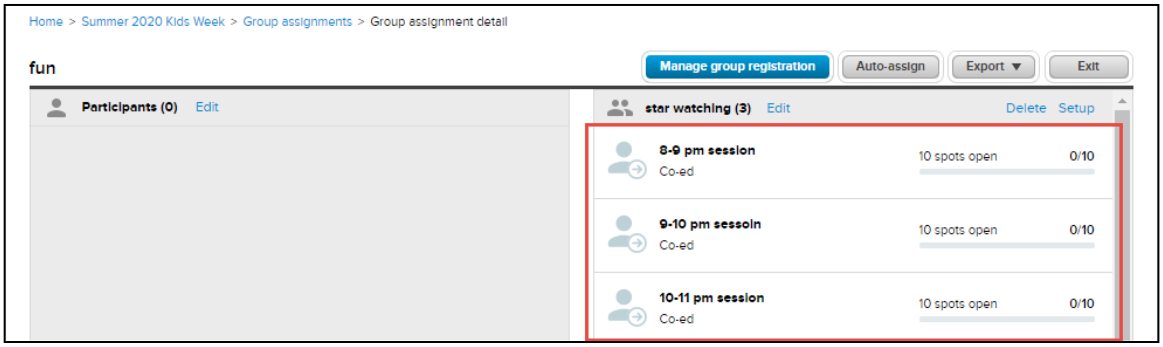
- Within a group, the sub-group names must be unique.
- The maximum sub-group **Capacity** is 100,000 for each sub-group. If no value is entered, then the **Capacity** is unlimited.
- If group-level **Gender**, **Grade** or **Age** restrictions have been set on the **Group setup** popup (see page 6), then those restrictions apply to all sub-groups and cannot be overridden (corresponding fields on this **Edit sub-group** popup are disabled). If a restriction is not configured at the group level, then users can configure the restriction for each sub-group.

Users can also create a new sub-group by copying from an existing sub-group of another group in the same group type by clicking **Copy from**:



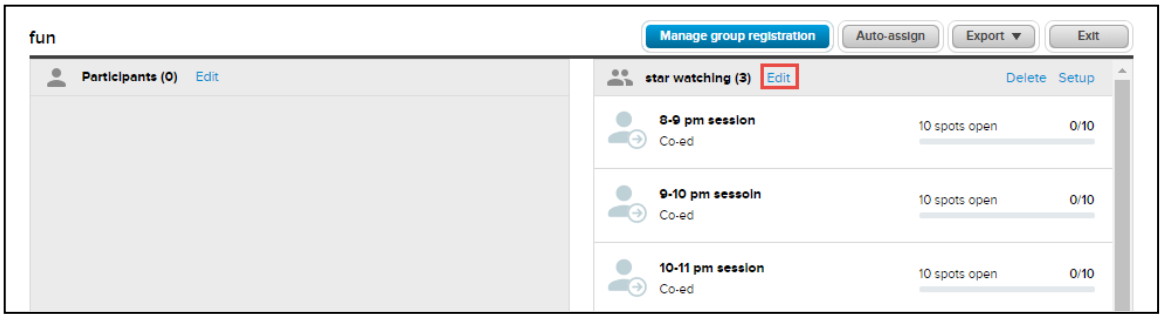


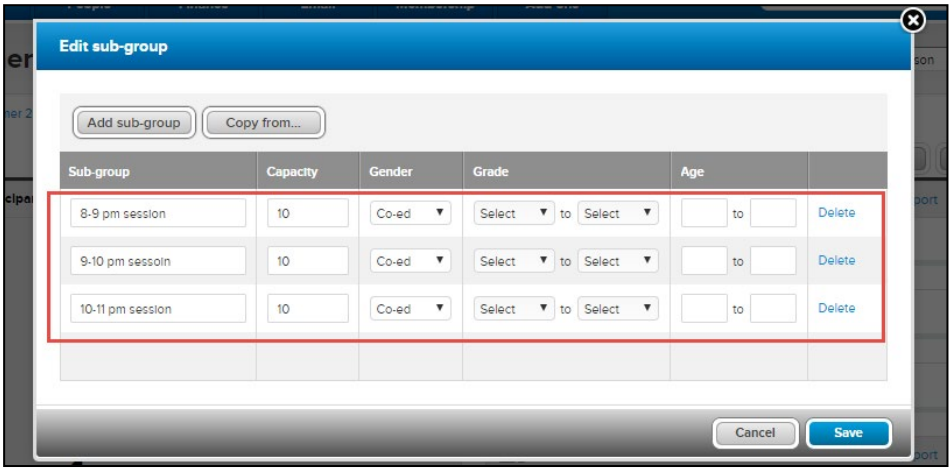
After sub-groups are created and saved, they are listed under their parent group:



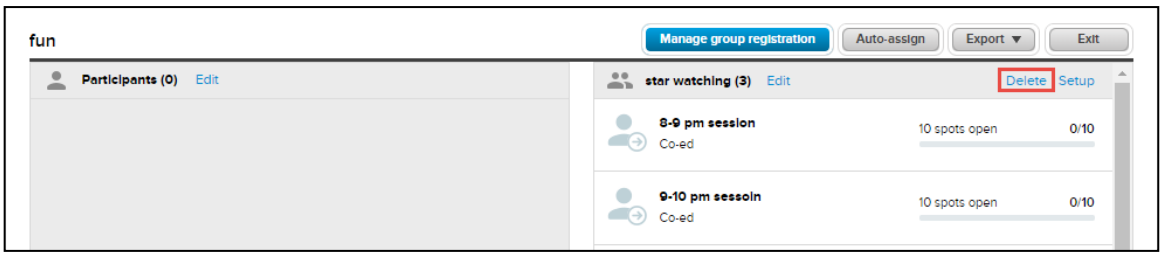
To edit or delete sub-groups under a group, click the group header > **Edit** and then make required changes on the

Edit sub-group popup:

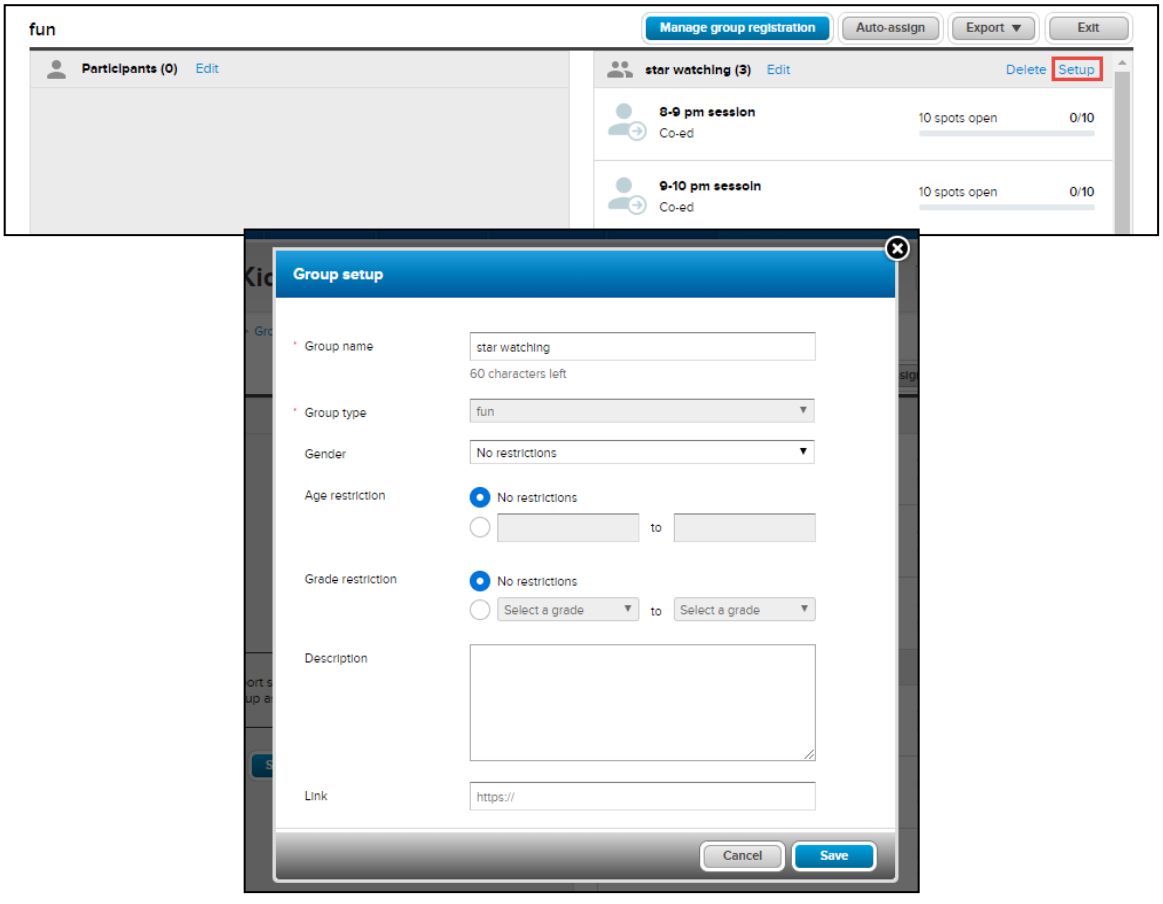

fun
Manage group registration
Auto-assign
Export
Exit
Participants (0)
Edit
star watching (3)
Edit
Delete
Setup
8-9 pm session
Co-ed
10 spots open
0/10
9-10 pm sessoin
Co-ed
10 spots open
0/10
10-11 pm session
Co-ed
10 spots open
0/10



To delete a group, click the group header > **Delete**:

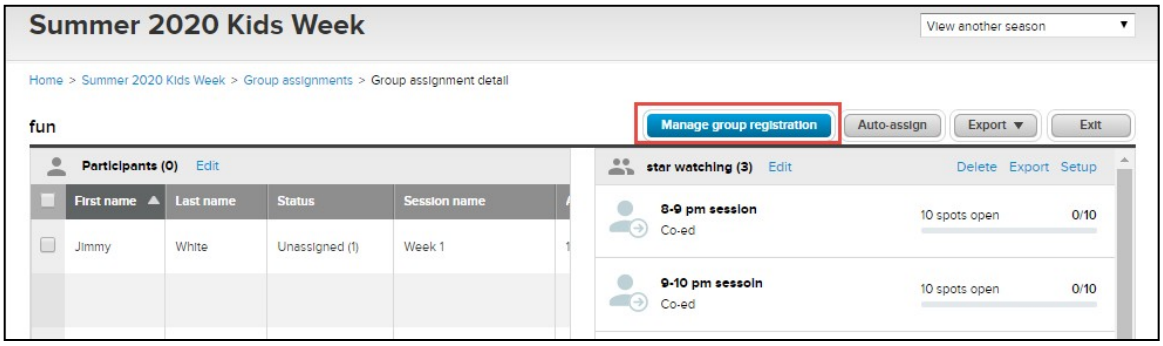


To edit a group setup, click the group header > **Setup** and then make required changes on the **Group setup** popup (changes will also be applied to all sub-groups):

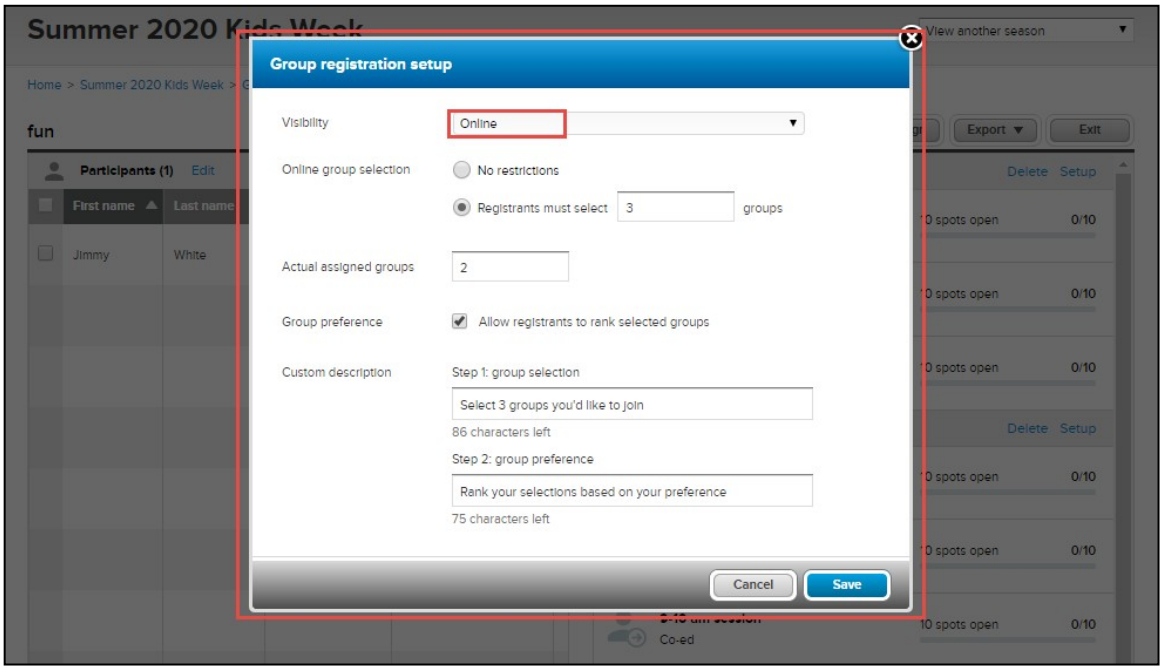


Configuring Group Registrations

After setting up the required groups and their sub-groups, on the group type page, agency users can configure online group registration rules for this group type by clicking the **Manage group registration** button:



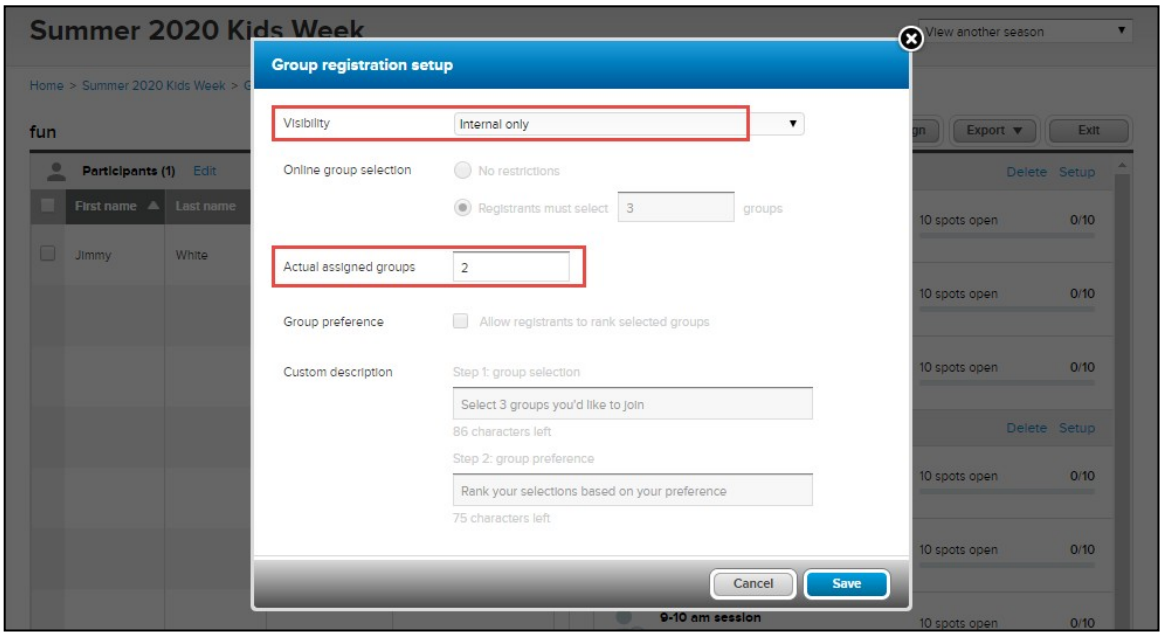
On the **Group registration setup** popup, if the **Visibility** > **Online** option is selected, then the groups will be available during the CUI registration workflow. Agency users can configure rules for CUI group registrations (such as the number of groups that consumers can select in a session or to allow consumers to set priorities for their online group selections):



- **Online group selection**:
  - If the **No restrictions** radio button is selected, then consumers can select any number (including 0 or all groups) during online registration.
  - If the **Registrants must select** *X* **groups** radio button is selected (*X* must be less than or equal to 3), then consumers must select the required number of groups during online registration.
- **Actual assigned groups**: the actual number of groups to which to assign the consumers (if a number is entered, then it must be less than or equal to the number of groups that consumers can select online).
- **Group preference**: selecting this option allows consumers to rank their selected groups by preference.
- **Custom description**: custom text to replace the default **Step 1: group select** and **Step 2: group preference**

headers in the CUI.

If the **Visibility** > **Internal only** option is selected, then the groups are not available to CUI registrations. The relevant fields for online registrations are disabled and agency users can only configure the **Actual assigned groups** number:

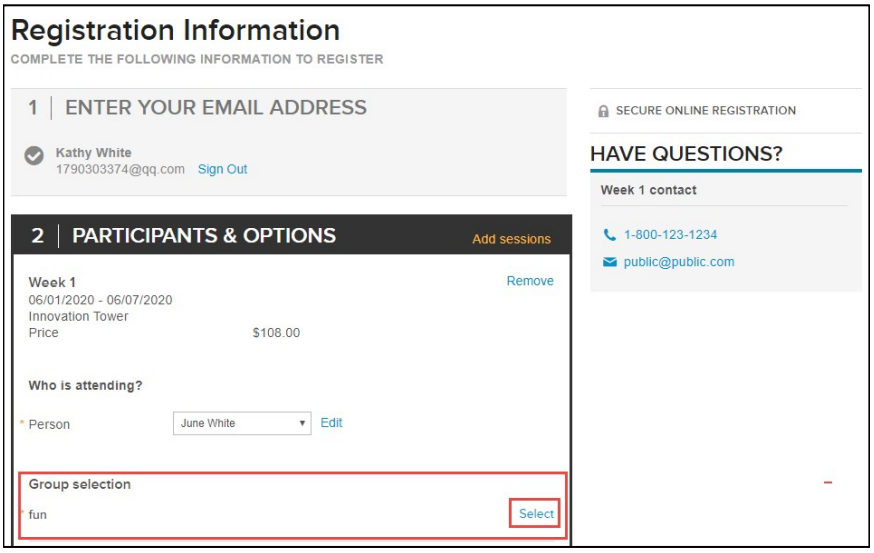


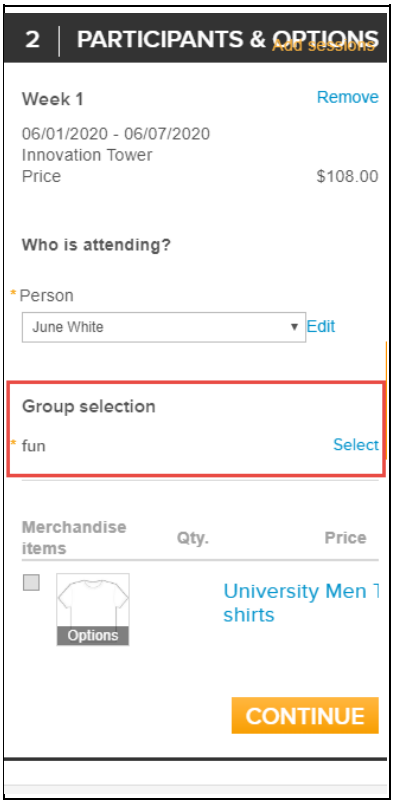
CUI: Online Group Registrations

If the Admin Site > **Group registration setup** > **Visibility** dropdown > **Online** option has been selected (see page 12), then during a CUI registration, after selecting a participant, available groups are displayed in the **PARTICIPANTS & OPTIONS** > **Group selection** section:

Desktop

Mobile


Registration Information
COMPLETE THE FOLLOWING INFORMATION TO REGISTER
1 | ENTER YOUR EMAIL ADDRESS
Kathy White
1790303374@qq.com Sign Out
SECURE ONLINE REGISTRATION
HAVE QUESTIONS?
Week 1 contact
1-800-123-1234
public@public.com
2 | PARTICIPANTS & OPTIONS
Add sessions
Week 1
Remove
06/01/2020 - 06/07/2020
Innovation Tower
Price
$108.00
Who is attending?
* Person
June White
Edit
Group selection
* fun
Select

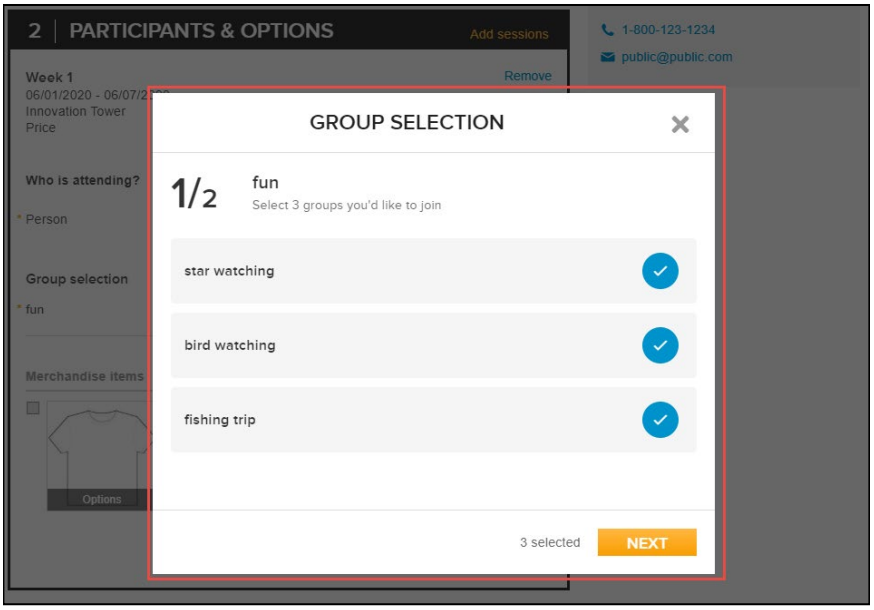

2 | PARTICIPANTS & OPTIONS
Add sessions
Week 1
Remove
06/01/2020 - 06/07/2020
Innovation Tower
Price
$108.00
Who is attending?
* Person
June White
Edit
Group selection
* fun
Select
Merchandise items
Qty.
Price
Options
University Men T shirts
CONTINUE

Note:

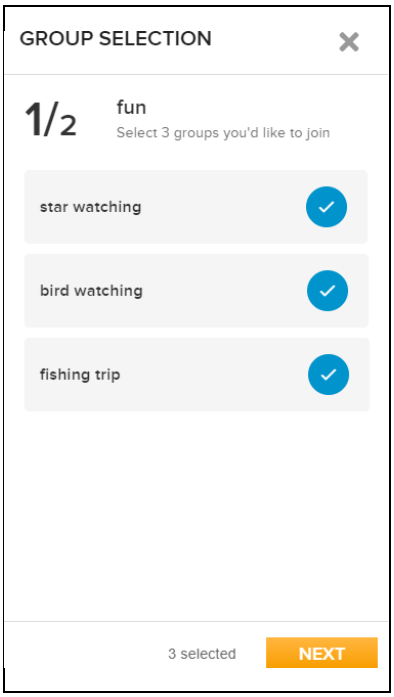
- If the agency has configured group-level age, gender or grade restrictions on the ADMIN SITE > **Group setup** popup (see page 6), then only eligible groups for the selected participant's age, gender and grade are displayed.
- If ADMIN SITE group configurations are changed before consumers place their order, then their eligible groups will change accordingly.
- If the agency has configured the ADMIN SITE > **Group registration setup** > **Online group selection** > **Registrants must select** *X* **groups** option (see page 12), then consumers must select the required number of groups before proceeding.
- Registrants on a waitlist are not eligible for group registrations.

Consumers can click **Select** to select the groups they are interested in:

Desktop



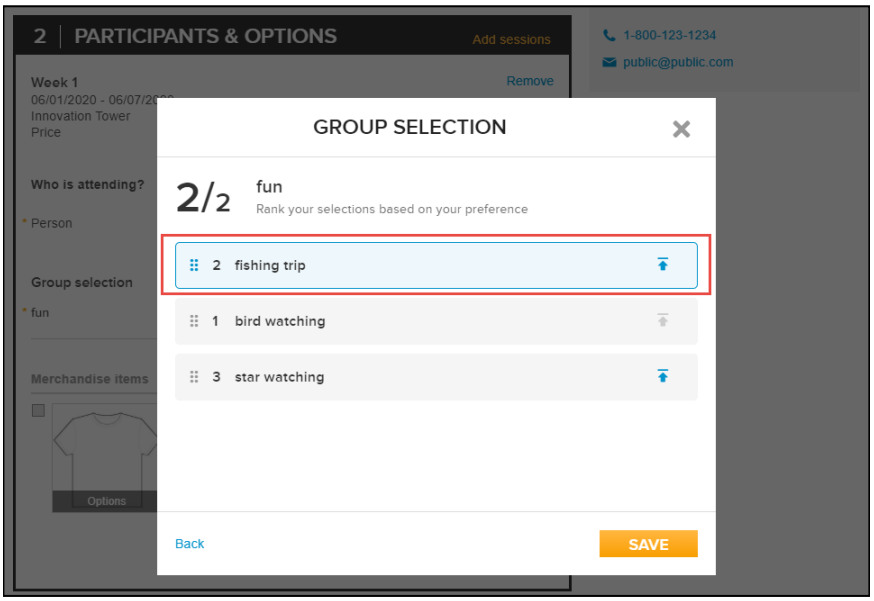
Mobile

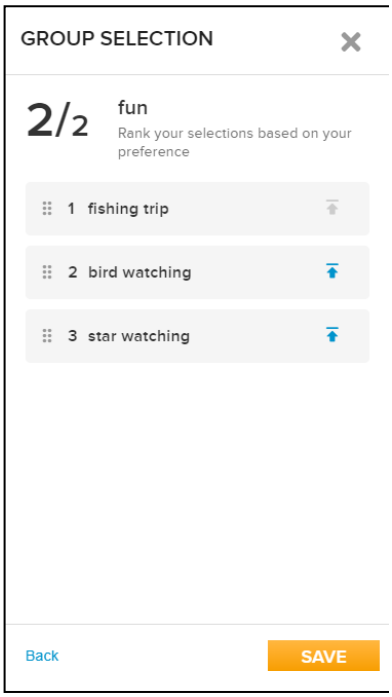


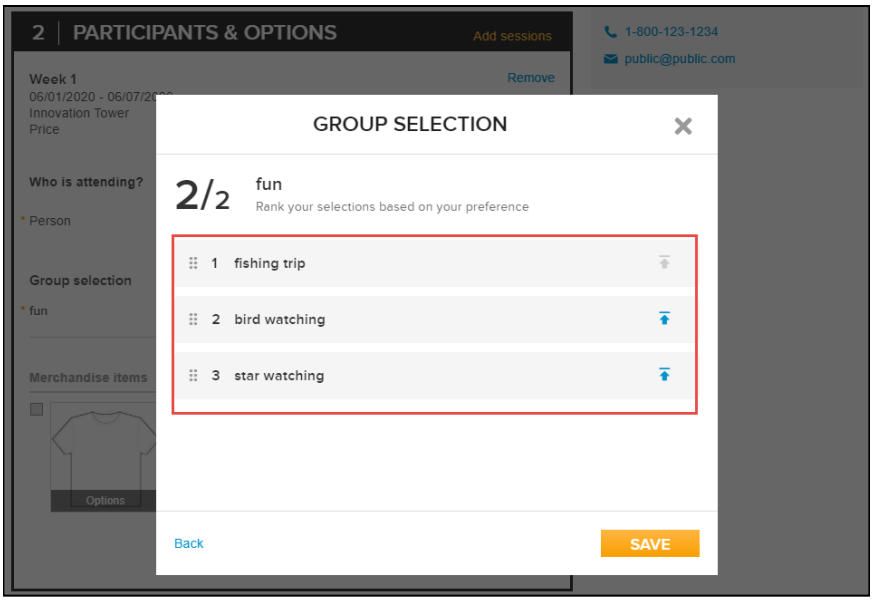
After selecting the required groups and clicking **NEXT**, if the Admin Site > **Group registration setup** > **Group preference** checkbox has been checked (see page 12), then consumers can rank their group selections according to their preference by dragging-and-dropping the selected groups into the required order:

Desktop

Mobile





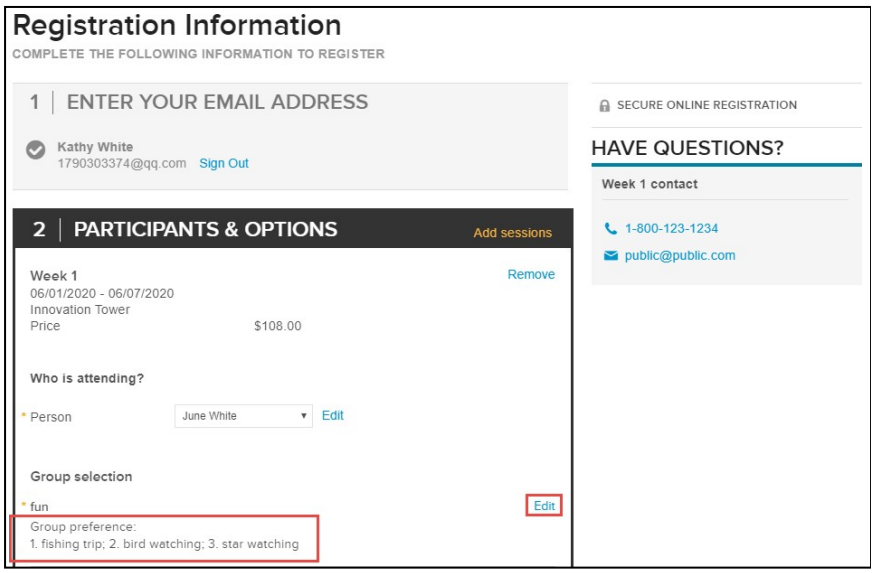


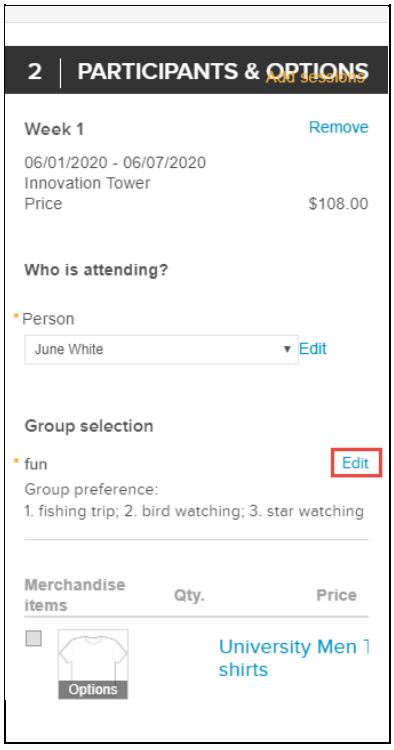
Note: if consumers proceed without ranking their selected groups, then the order in which the groups were selected is used.

After saving their group selections, consumers can change their selections or re-rank their preferences by clicking the group type > **Edit**:

Desktop

Mobile





When editing a registration with group selections:

- transferring the registration to another session will remove the participant's group selections.
- canceling the registration will remove the participant from the Admin Site > group type > **Participants** section (see page 6).
- editing a registration tuition will remove group selections belonging to that tuition.

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