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Introduction

Welcome to the Center of Excellence (COE) user guide series. This comprehensive collection of guides is designed to help users navigate the various processes and functionalities within the COE portal with ease and efficiency. Whether a user is new or looking to deepen their understanding, these guides provide step-by-step instructions, essential resources, and expert tips to enhance the experience.

The purpose of this particular user guide is to walk users through the account creation process on the COE portal. Creating an account is the first and crucial step to access the plethora of tools, information, and support available through the COE. We aim to make this process as simple and straightforward as possible, ensuring that users can swiftly begin utilizing the portal's full range of features.

Vocabulary Glossary

Useful & Frequently Used Terms:	
Term	**Definition**
Portal	The main site that SO constituents will interact with the Center of Excellence platform. This is where users can log in or create an account.
Front-End	Another way of referencing the portal – What SO constituents will see and interact with.
Sandbox Environment	Also called "UAT" this is a test version of the portal – where SO staff can train and test using data that will not impact a users' experience.
Production Environment	Also called "Live Portal" – This is the version of the COE platform that constituents will use to manage their experience with SO.
Account	Also called "Profile" – This is a users' information, personal to them.
Verification Code	An important step in the account creation process, this indicates the code a user receives via email to confirm the initial creation of their portal account/profile.
Prospect	This status reason is automatically assigned and is default for all users. This status means that the contact was created, the profile information has not been populated or is partially populated. At this point they are not considered to be an Athlete, Volunteer or Parent/Guardian/Family member.
Dynamics	Also called "the Backend" – This is the staff side of the COE solution, where staff can view and interact with individual profiles, forms and events.
Role	Indicates how a user will interact with the portal. A role can be either Athlete, Parent/Guardian/Family or Volunteer. A user can be more than one of these roles, only after the initial account creation process.
Landing Zone	Indicates the screen a user will see after their account creation is completed – Dependent on the role a user selects.

Section A: Accessing the Portal

1. Access the portal by visiting either the Sandbox or Production environment. If purely testing and learning the COE product, it's recommended to use the Sandbox portal environment.
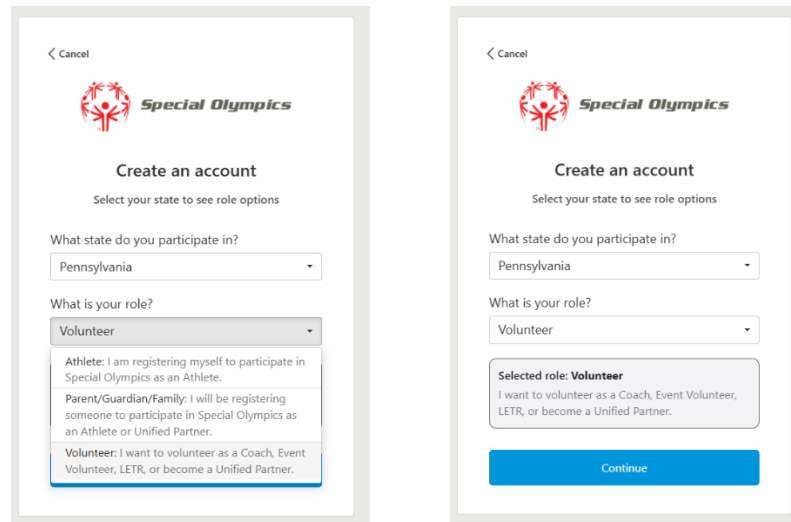

2. Once one the portal screen, select "*Create An Account*"
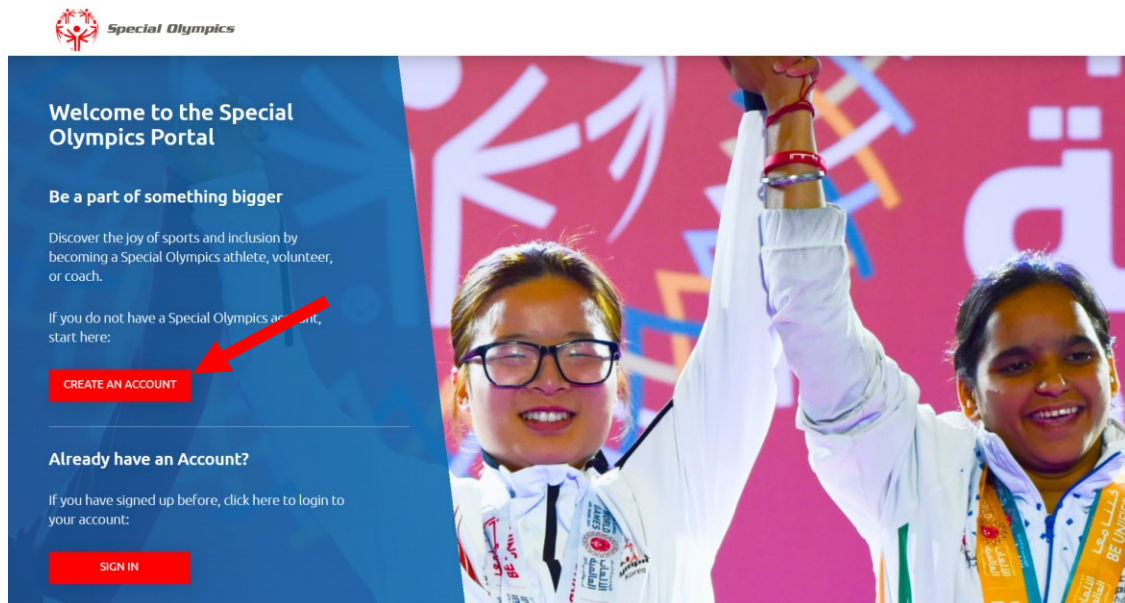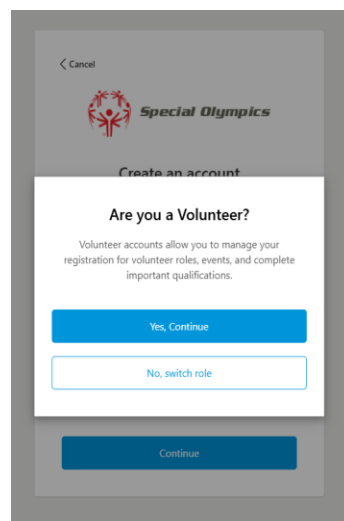
Section B: Completing the Email Verification Process

1. "Create an Account" button opens a new screen, asking for the state the user participate with and what the role is they are registering with. Selecting the correct role for the user will walk them through the correct account set up.
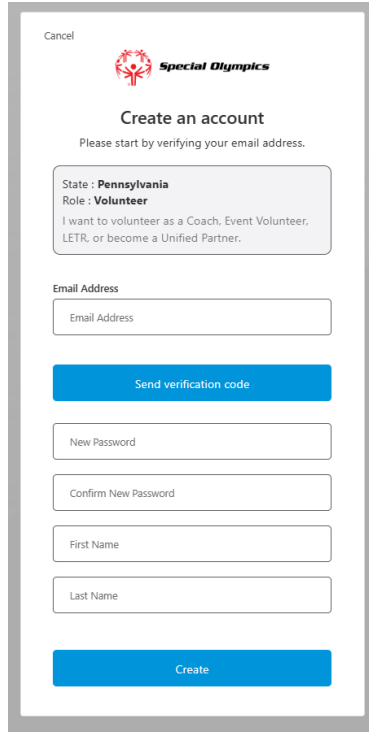
2. After selecting the correct role (either Athlete, Parent/Guardian/Family, or Volunteer) the user will need to confirm that this is the correct role they are wanting to apply for. A user can be more of these roles later, but the initial selection will determine what Landing Zone they see first.

3. Users will be asked for initial basic information; their email, password, and name. The email is the **most important** piece of information regarding a user's profile or account. This is required for any user who would like to access the portal. The user will need to make an account for **<u>themselves</u>** first before any other action can be taken.

4. Enter an email address the user has access to and wishes to use for communication regarding a portal account. Click "***Send verification code***"

5. After clicking "**Send verification code**" a user will receive an email, containing a verification code. This email is sent via _Microsoft on behalf of Special Olympics_. A user can copy and paste this code or type it into the box that appears after clicking "**Send Verification Code**". ***Note: A user may need to check spam folders depending on the settings of their email provider***

Special Olympics
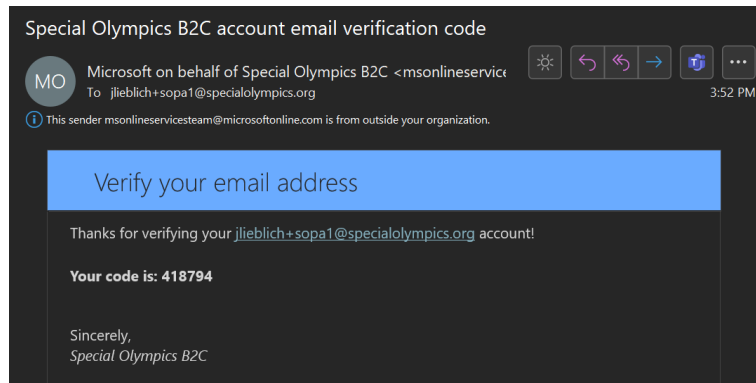
6. Once a user has confirmed an email, they will be asked to set a password and enter their first and last name. Passwords are a requirement, and the portal will indicate the character requirements for them if not met, including use of an uppercase letter, digit and symbol.

Special Olympics

Create an account

Please start by verifying your email address.

State : **Pennsylvania**
Role : **Volunteer**

I want to volunteer as a Coach, Event Volunteer, LETR, or become a Unified Partner.

One or more fields are filled out incorrectly. Please check your entries and try again.

E-mail address verified. You can now continue.

Email Address

jlieblich+sopa1@specialolympics.org

The password must be between 8 and 64 characters.
The password must have at least 3 of the following:
 - a lowercase letter
 - an uppercase letter
 - a digit
 - a symbol

••••

The password must be between 8 and 64 characters.
The password must have at least 3 of the following:
 - a lowercase letter
 - an uppercase letter
 - a digit
 - a symbol

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Create

7. Click "*Create*" to move on to the next series of questions. At this point, a user is considered a "Prospect" in the system, meaning that their journey towards participation has started. Their information can be accessed in dynamics moving forward, and a SO staff member can view and interact with the user's information.

Section C: Completing the Profile Questions

1. The next series of screens will walk the user through answering important questions regarding their person. Most of this information can be updated by the user later or changed in its entirety by a SO Staff Member in Dynamics. Required fields are indicated by a red asterisk (*).
   a. Use the dropdown to select your Country Code for the primary phone number.

2. Clicking "**Save & Continue**" moves the user through the portal, saving their information each time. A user can come back to the portal and pick up where they left off in the account creation process.

3. **"When were you born?":** A user can type their date of birth in the applicable format (MM/DD/YYYY) or use the calendar icon on the right side of the text box to select their date of birth. *NOTE: If a user's date of birth is Under 18, they may have a different experience with the portal, such as requiring a Parent or Guardian to complete information on their behalf*. Click "**Save & Continue**"
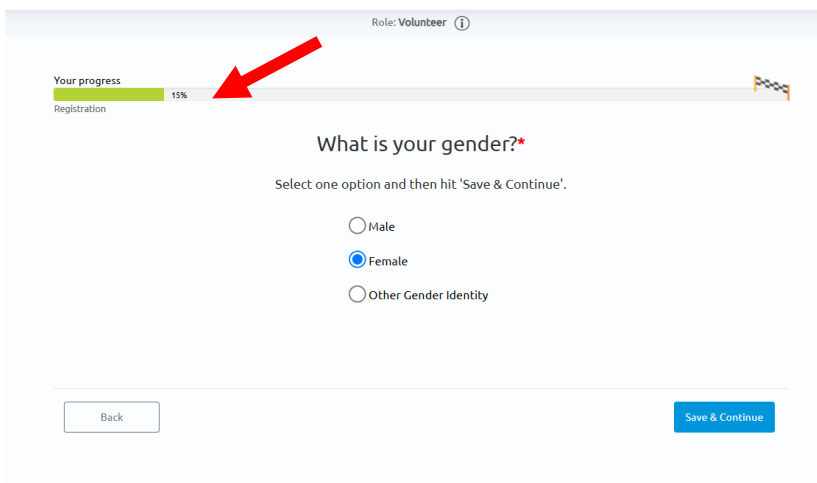
4. As a user moves through the process they will see a progress bar at the top of their screen, this indicates how far they are into completing their profile information. They are still able to come back to this information and update it later. Click "**Save & Continue**"
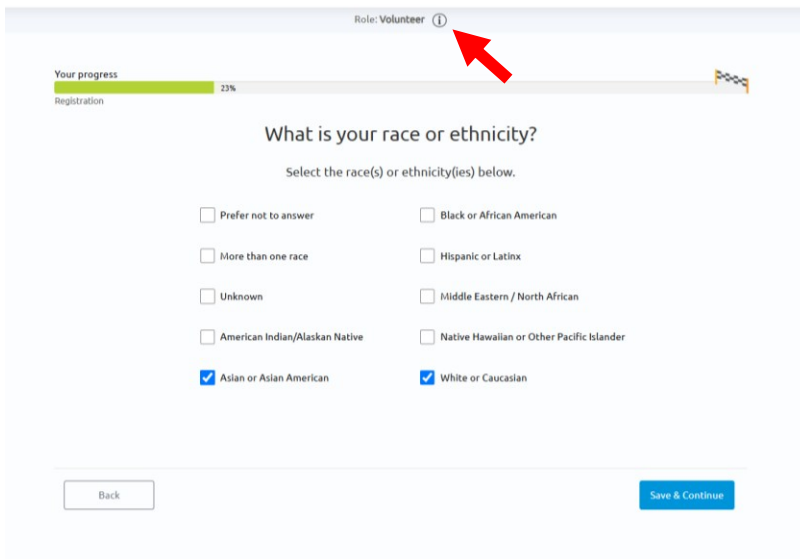
5. A user will also see what role they initially signed up for at the top of their screen. This cannot be changed from the portal, but other roles can be added later. Continue answering the questions, clicking "*Save & Continue*" after each one.

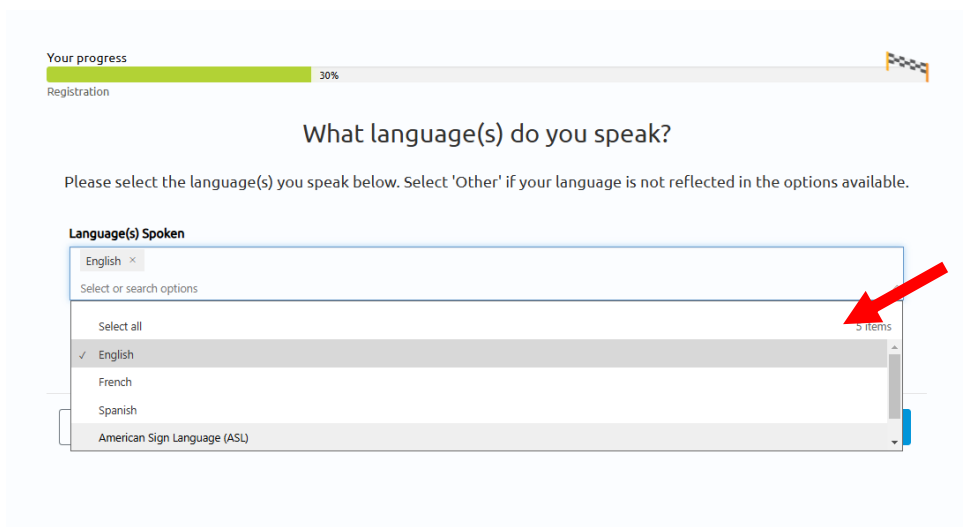6. **"What language(s) do you speak?":** A user can type the language(s) they speak or use the drop-down menu on the right side of the text box to select the pre-populated options. A user should select all that apply, then select "*Save & Continue*"

Special Olympics

7. **T-Shirt Size** can be selected via the drop-down menu. These options are set by your SO program and can be modified at any time. Click "**Save & Continue**"

8. **"Select Region":** Is often the question that is confusing to a user. These options are set by your program. The user should indicate the localized area that they participate in. By clicking the **Plus Sign icon**, you can expand the options based on a programs structure. A user also has the option of selecting "**Don't Know**".
    a. If a user selects the lowest level of the Region Select, Example "*Beaver*", the system will automatically make the relationship up to the highest level of the region structure, for example "*Region 9: Three Rivers*". A user only needs to indicate one selection on this question.

Special Olympics
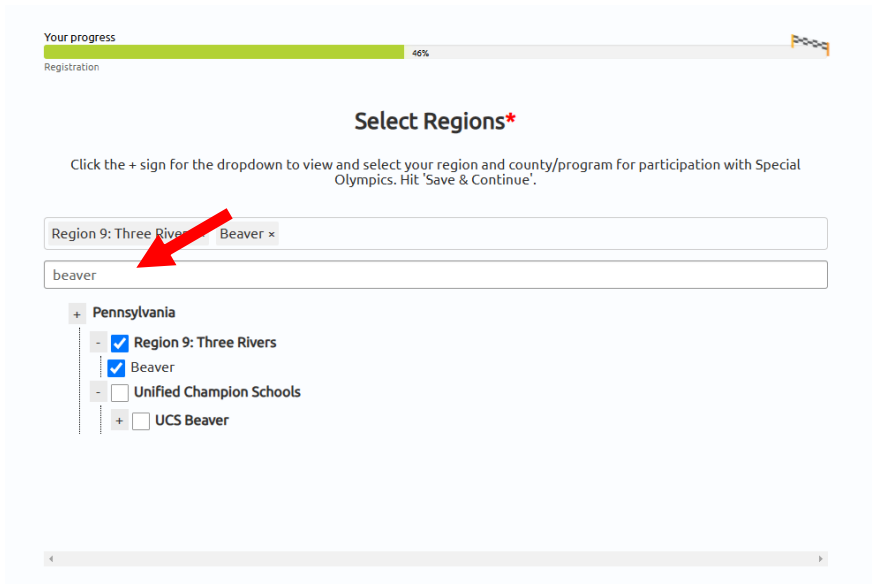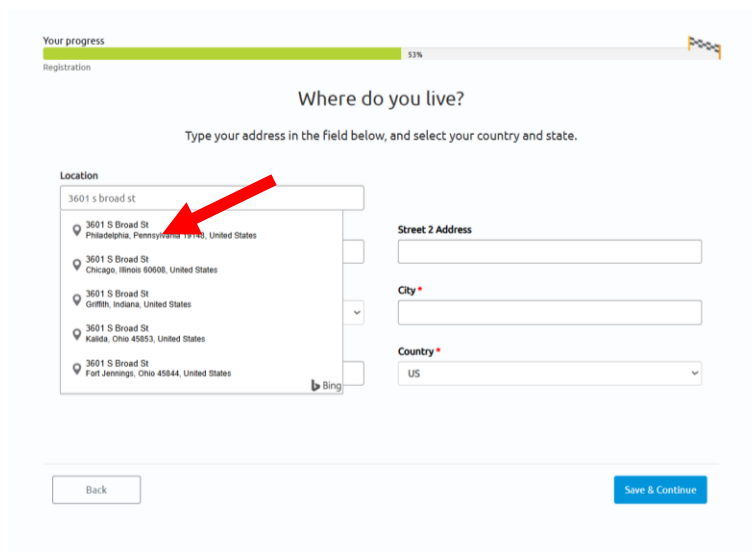
9. **"Select Region":** The user can also utilize the search bar by typing in the specific name they are looking for: by using the search bar this will shorten the list to just include Regions that include the specified. They will still need to select the Plus Sign Icon to select the box.

10. **"Where Do You Live**?": A user will need to indicate their mailing address on this question. In the "*location*" box, they can use the Bing Maps integration to populate their address, saving time. Alternatively, they can type information regarding their address in each of the available boxes. Apartment, suite, etc.. numbers can be entered into the Street 2 Address. Click "***Save & Continue***"

11. **Parent/Guardian Information:** *Only applicable if user is Under 18* This question requires a user to complete information regarding their parent or guardian, including mailing address and email address. Once filled, click "*Save & Continue*"

12. **"In case of Emergency, who should we contact?":** This question asks a user to indicate an emergency contact required for all contacts. Users will need to provide a name, phone number, and the relationship they have with this individual. Click "*Save & Continue*"

13. This completes the steps required for the initial account creation process. Depending on what Role a user selected, you may have one additional question to answer before accessing the landing zone. Once all is complete you will now see the landing zone of the role the user applied for. Please refer to the applicable user guide on the role a user selected for more information specific to their experience in that landing zone.

Helpful Links & Resources:

Sandbox/UAT Portal

Sandbox/UAT Dynamics (Backend)

Production/Live Portal

Production/Live Dynamics (Backend)

COE HelpDesk

COE Sharepoint Resource Page

Video Library

Userguide Library

One Pager Library

Glossary Library

FAQ Library