The Mountaineers

Leader Instructions and Guidelines for Using the Club's Online Membership and Event Database

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Introduction

Welcome to the club's online system! We'll use this system to manage all aspects of our trips and events in the coming seasons. Many of you have probably already logged into your account in the new system and seen much of what it can do.

If you've never logged into your account at imis.mountaineers.org/source/security/member-logon.cfm, read and follow the first-time login instructions at www.mountaineers.org/intro.html. There are three main areas represented by icons on the left side of the screen: My Profile (the blue head), Communities (the colorful people) and Activities (the compass). Click on the icons to see what is in each of these areas.

There are two very important sets of distinctions in the new online system: committees vs. activities and events vs. destinations.

- A *committee* is a group of people who make decisions, teach courses and lead trips—the Seattle Branch Sea Kayaking Committee.
- An *activity* is something that we do—hike, climb, bike, sail.
- A *destination* is a place and a route to that place that involves a specific type of *activity*— The Tooth/S Face is a climb.
- An *event* is a course, a seminar or a climbing trip to a specific *destination* that is scheduled, organized and led by the leader of a *committee* on a given date—a hike to Summerland on September 4, 2005 led by Martin Mountaineer, a leader for the Seattle Branch Photography Committee.

Overall Procedure for Scheduling an Event and Filing Reports

These are the things you'll need to do as leader to manage an event in the new online system. Each item is discussed in detail on the following pages.

1. Create an event in the club's new online system.
2. Manage your roster and communicate with your participants.
3. Go have fun!
4. Update your event roster and assign credits if the event is associated with a course.
5. File an event (trip) report.

Scheduling/Listing an Event Online

Note that a *general online event creation procedure* may be viewed at www.mountaineers.org/temp/event_intro.html. This procedure is the general set of instructions for creating an event in the club's new online system. It is a useful reference because it contains sample screen shots for each step in the procedure.

1. Log into your account.

2. Click on either the compass icon in the upper left side of the screen or the word, "Activities" in the lower section of the title bar.

3. Click on the “Activity Set-up” link in the “Activity” box on the left side of the screen.

4. Choose the correct activity type from the “Event Type” drop-down box or just type part of the destination’s name in the “Destination Name” box. If you choose an activity from the “Event Type” drop-down box, you’ll be directed to a destination search screen with more search options. Choose options to narrow your search as you wish. Do remember that it is usually best to start with a wide search and narrow it than it is start with a narrow search and end up with little or no results. It is usually best to choose one word that is part of the destination’s name. For example, “burroughs” vs. “second burroughs” and “rainier” vs. “mount rainier,” “mt. rainier,” or “mt rainier.” If the search results list is too long to browse, then you may wish to specify more search terms or words that are part of the destination name.

5. Once you see the destination for which you wish to create an event, click on the title of that destination. If you cannot find the destination you desire, contact your committee or designated event coordinator and ask them to create the destination you desire.

6. At the top of the screen, you’ll see a list of future trips scheduled for this destination in the “Scheduled Events” table. Please make sure that the dates you plan to schedule for this destination are not in conflict with an event already scheduled. The destination details follow the list of schedule events for the chosen destination. Please look them over to be sure you have chosen the correct destination.

7. If there are no conflicts and you have selected the correct destination, click the “Create new event” button at the bottom of the screen. If you need to choose another destination, click the “Back” button.

8. On the “Event Setup” page that appears, enter the committee, branch, and begin and end dates in the appropriate boxes as required. Note that you may click on the calendar icon to view and choose dates from a calendar.

9. If you are an event coordinator click the “Find event leader” link to search for and select the event’s leader (your name should appear initially because you should log into your account, not the leader’s account for whom you are creating the event).

10. Enter the correct leader and participant capacities. Leaders are the trip leader or co-leaders, assistant leader, mentored leader and may be students or graduates of a program. The participants are everyone else. Registration for leader or participant roster is based on the prerequisites listed in the destination’s details. Make certain that the total does not exceed the maximum allowed by the destination’s jurisdiction.

11. Check the *Leader’s Permission Required* or *Sign Up With Leader* and/or *Does this event qualify for course credit?* check boxes as needed based on the information below.

    Leader’s Permission Required: Leader’s Permission Required is intended for events that require much more than the average amount of skill or conditioning for that type of activity. Registration is based on the honor system; the participant must request permission from the leader prior to registering. As part of the registration process, they are asked to check a box that states they have obtained the leader’s permission.

Sign Up With Leader: Use this option if you want complete control of the registration process. Your event will be listed like any other event. Any participant that attempts to register will be given your phone and email and directed to you for registration. As participants contact you to register, add them to the roster online (see "Registering Participants for Your Event" below).

Does this event qualify for course credit?: Check this box if the event is one for which students should get credit if they successfully complete the event.

12. Enter the meeting time, meeting place, drive time and any notes to your participants in the appropriate boxes if desired. The "Leader's Notes" area is good way to provide specific information to participants. This information appears online by clicking on the event's title wherever it appears and is part of the confirmation that is emailed to each participant. Note that you may use HTML tags and Style Elements to format text in the "Event Leader's Notes" box. An *HTML and Style Elements Primer* may be viewed at www.mountaineers.org/temp/comtags.html.

13. Once you have entered all of the required and optional information, click the "Next" button.

14. Enter the registration opening and closing dates and times. You may set the registration opening and closing date and time to whatever you wish. This could be five minutes before you plan to leave. So long as the event is available for registration in the online system and the clubhouse is open for business, the staff will take registrations and cancellations by telephone. There is no need to enter anything in the "Early Registration" date and time fields. These fields are not applicable to any of our events and will be soon removed. There is usually no need to enter any information in the fee fields. If you are running an event for which there is a fee (e.g. a course or seminar), please contact the clubhouse for advice (clubmail@mountaineers.org or (206) 284-6310).

15. Click the "Next" button.

16. Verify that all of the event's details are correct and click the "Submit" button.

Editing the Details of an Online Event Listing

You can change most of the details of an event online. This is a way to correct errors, add more notes, extend the registration period, etc. If you do make changes after registration opens, please contact participants who have already registered so they will be aware of the changes. If you are unable to change a detail online, contact the Member Services staff by phone during regular business hours or by email at clubmail@mountaineers.org to request the change.

1. Log into your account and navigate to your "My Profile" area by clicking the "blue head" icon at the left side of the screen.

2. Click on the event's title in the "Upcoming Events" table.

3. Click the "Edit" button at the bottom of the event detail page that is displayed.

4. Make the necessary changes and click the “Submit” button.

Changing the Event Leader

1. Log into your account and navigate to your “My Profile” area by clicking the “blue head” icon at the left side of the screen.

2. Click on the appropriate “View Roster” link in the “Upcoming Events” table.

3. Use the “Register another member” link to add the new leader to the roster if they are not already on the roster.

4. Click the gray arrow next to the leader’s name to whom you are transferring leadership duties.

5. Cancel yourself from the event if necessary.

Changing the Event’s Destination

1. Log into your account and navigate to your “My Profile” area by clicking the “blue head” icon at the left side of the screen.

2. Click on the event’s title in the “Upcoming Events” table.

3. Click the “Edit” button at the bottom of the event detail page that is displayed.

4. Click on the “Change destination button” at the top of the screen.

5. Search for the new destination on the search page displayed.

6. Click on the title of the new destination in the list of search results presented.

7. Verify that no other leader has scheduled the destination that you are choosing.

8. Click the “Change Destination” button.

Registering Participants for Your Event

Once you have scheduled an event, you may add participants to the leader and participant rosters.

1. Log into your account and navigate to your “My Profile” area by clicking the “blue head” icon at the left side of the screen.

2. Click on the appropriate “View Roster” link in the “Upcoming Events” table.

3. Click the “Register another member” link at the bottom of the roster page that is displayed.

4. Enter the name (last, first) of the member you wish to add in the “Name” box and click the “Search” button. Note that you may enter part of the last name or the entire last name and part of the first name (e.g. “Mountai” or “Mountaineer, Ma” to find Martin Mountaineer).

5. Choose the correct person by clicking once on their name in the pop-up box containing the list of names that match your search criteria.

6. If the participant is qualified to be on the leader roster and you wish to register them as such, click the “Yes” radio button in the leader roster area.

7. Click the “Register” button.

8. Enter the participant’s carpool information if known and click the “Submit” button.

9. Click the “Register another member” link on the confirmation page that appears to continue adding participants.

Canceling Participants From Your Event

Once you have scheduled an event and participants have registered or been registered, you may cancel them.

1. Log into your account and navigate to your “My Profile” area by clicking the “blue head” icon at the left side of the screen.

2. Click on the appropriate “View Roster” link in the “Upcoming Events” table.

3. Click the “X” link to left of the name of the participant that you need to cancel.

4. Enter any appropriate comments in the box at the bottom the “Confirm Event Cancellation” screen that is displayed. Note that these comments will be emailed to the participant as part of a cancellation confirmation email.

5. Click the “Cancel Registration” button.

Canceling an Event Scheduled for a Future Date

It is not yet possible to cancel an event online if it is scheduled for a future date. This feature is still under development. If you need to cancel a future event, please do these two things:

1. Contact the Member Services staff by phone during regular business hours or by email at clubmail@mountaineers.org to request the cancellation.

2. Contact the affected participants to notify them of the cancellation.

Viewing and Using Your Event's Roster

Finding the Roster: Log into your account and navigate to your "My Profile" area by clicking the "blue head" icon at the left side of the screen. Click on the appropriate "View Roster" link in the "Upcoming Events" table.

Sorting the Roster: Select the appropriate radio button at the top of the roster to sort the list by name or registration order. You may print this page, email participants or download a file containing the roster.

Choosing Participants to Email or Include in an Export: Click the link "Select/deselect all" link at the bottom of the right-most column, called "Send email?" for each group (Leader and Participant Registration and Waitlist Rosters) to select or deselect all of the participants in that group. Click the individual check boxes in the "Send email?" column to select or deselect individual participants.

Emailing Chosen Participants: Click the "Email all selected members" radio button and click the "Submit" button. Type your message and click the "Send" button. Note that the email is web-generated. It does not send a copy of the message to the sender (you) unless your email address is included in the "To:" box of the email message being generated.

Exporting Chosen Participant Information: Click the "Export selected members" radio button and click the "Submit" button. Click the MemberExport.csv link to download the file to your computer. Choose to open or save the file as desired. Note that this file is a comma-delimited text file that will likely contain more information than you need.

Updating Your Roster and Assigning Credit to Students After the Event

1. Log into your account and navigate to your "My Profile" area by clicking the "blue head" icon at the left side of the screen.

2. Click on the appropriate "Update Roster/Credits" link in the "Leader" column of your "Event History" table.

3. Use the "Register another participant" link to add any last-minute additions to the event roster.

4. Use the "remove from roster" link to cancel participants.

5. Use the "red double arrow in the yellow box" links to add participants who were on the waitlist or had been cancelled but attended.

6. If you need to change the event leader, use the gray arrow to the left of the name of the leader to whom you are transferring leadership duties. At this point, you may wish to click the "Save for later" button so that the new leader may complete the Update Roster/Credits and Event Reporting filing processes.

7. If credit may be obtained for successfully completing this event, use the "Select/deselect group" links or check the boxes under the "Process course credit?" column to assign credit to those participants who have successfully completing the event.

8. If you need to change any of the event's details, click on the "Edit event details" link at the top of the screen.

9. If the event was cancelled, check the "Check if this event was cancelled" box at the top of the screen.

10. Click the "Save for Later" button if you wish to check your work later before submitting it. If it is ready to submit, click the "Submit and close" button. Clubhouse staff will finalize the closing within one business day and archive the event's roster and credit assignments.

11. After clicking either the "Save for later" or "Submit and close" button, you'll be taken to the "Event Report" screen where you may enter the details of your event.

Filing Event (Trip) Reports

1. After clicking either the "Save for later" or "Submit and close" button during the Update Roster/Credits process, you'll be taken to the "Event Report" screen where you may enter the details of your event.

   If you did not file the event report immediately after you filed the roster and assigned credits or if you need to edit the event report, log into your account and navigate to your "My Profile" area. Click on the "File event report" or "View event report" link next to the appropriate event title in the "Leader" column of your "Event History" table.

2. If empty boxes are present, enter appropriate information in them and click the "Submit" button. If there are no empty boxes, click the "Edit" button at the bottom of the screen, enter appropriate information in the boxes and then click the "Submit" button.

NOTE: Information entered in the "Incident Reporting" and "Confidential Participant Performance Notes" boxes is confidential. It will NOT be displayed to anyone viewing the event report. Information entered in the "Incident Reporting" box will be forwarded to the Executive Director and the BOT Safety Committee Chair and stored in the database for later data analysis. Information entered in the "Confidential Participant Performance Notes" box will be forwarded to the chair of the committee that sponsored the event and stored in the database.

Researching Event (Trip) Reports

Option 1 – Destination Search Method

This is the best option because it provides an excellent summary of the event reports available as a table with events listed from most recent to least recent.

1. Log into your account.

2. Click on either the compass icon in the upper left side of the screen or the word, “Activities” in the lower section of the title bar.

3. Click on the “Activity Set-up” link in the “Activity” box on the left side of the screen.

4. Type part of the desired destination’s name in the “Destination Name” box. If you choose an activity from the “Event Type” drop-down box, you’ll be directed to a destination search screen with more search options. Choose options to narrow your search as you wish. Do remember that it is usually best to start with a wide search and narrow it than it is start with a narrow search and end up with little or no results.

5. Once you see the destination for which you wish to find event reports, click on the title of that destination.

6. At the top of the screen, you’ll see a list of future events scheduled for this destination in the “Scheduled Events” table and a list of events for this destination for which event reports have been filed in the “Event Report Summary” table. Click on the “View event report” link next to the event report you wish to view.

7. When you are finished viewing the event report, you may click you internet browser’s back button to return to the destination details if you wish to view more event reports for that destination listed in the “Event Report Summary” table.

Option 2 – Event Search Method

1. Log into your account.

2. Click on either the compass icon in the upper left side of the screen or the word, “Activities” in the lower section of the title bar.

3. Check the “Search for **past** event rosters/reports (enter date range to search).” Checkbox.

4. Choose an appropriate date range for your search.

5. Enter any other search criteria to help narrow your search for the events for which you wish to view event reports.

6. Click the “Search for activities” button.

7. Click on the “View Event Report” link for the event whose report you wish to view.