

## CMC TRIP LEADERS:

SAVE & USE THESE DIRECTIONS WHEN YOU ARE ADDING A CMC TRIP TO THE CALENDAR

New information is highlighted in blue

**HOW TO:** Schedule a Trip ☆ Complete a Trip ☆ Manage your Trip Roster: Add Guests and Members ☆  
☆ Duplicate a Trip ☆

- **NEW! DUPLICATE A TRIP**, event, or school to a new date. Select a past trip you want to duplicate by searching by date, trip word, or leader name. Then click "Duplicate." See additional directions on pg. 14.
- **NEW! EXPORT TRIP ROSTER TO EXCEL.**
- **MANAGE WAITLIST:** To add someone from the waitlist, increase the number of tickets available in "edit trips." Or add them manually and delete them from the waitlist.
- **For the trip to BE VISIBLE** and **allow people to register for the trip ON-LINE**, you must have clicked/entered the following fields: **1. TYPE, 2. APPROVED, 3. NAME OF TRIP, 4. TRIP DATE, 5. CATEGORY TYPE, 6. ACTIVE, 7. ALLOW REGISTRATION, and 8. AVAILABLE TICKETS.** (See next page for image.)
- Text with word formatting creates problems, so if you want to copy text from a word document into a trip description **COPY ONLY PLAIN TEXT.** (See screen shot and directions below).
- If you need to **CANCEL A TRIP**, event or school: **Change the status and ALSO unclick "Active" and "Allow registration" boxes.** It helps to type "Cancelled" into the trip name, since the cancelled trip will be visible on the trip admin page.
- For **"PASS CODE"** function, also check "Need Confirm" if you want everyone to use a pass code. If you want to use a combination of the classification system and the pass code, do not check the "Need Confirm."
- Check your trip roster and if you are not listed on it, please add yourself as the leader. Also, to **ADD A MEMBER** to your roster, please follow the directions and **use the person's last name OR member ID.** NOTE: do not search by first and last name, as this often doesn't work. Trip leaders can go back at any time and adjust their roster, even if they previously closed the trip. **NOTE: Some members have more than one record** because they have signed up for activities without logging into their member account. **Usually the lowest member id number** is associated with their membership information.
- To view trips you are leading: As a leader, after you log in, click on the Trip Leader Admin tab in the top right corner, then click manage trips. Adjust the date range and select your name under the trip leader drop down to view your trips.
- Currently there is NO AUTO EMAIL sent to trip participants prior to the trip.

**TIP: As in all Computer work, SAVE FREQUENTLY!** Complete **\*\*** items first, then click "update" before putting in all the information. After "update," You will be back at the trip admin page. Click "EDIT" on your trip to fill in the details.

## IMPORTANT FIELDS TO SCHEDULE A TRIP

★ Type	Trip
★ Status	Approved
★ Title	Roxborough State Park
Title 2	
Title 3	
★ Category 1	- All Trips
Category 2	
★ Date	3/31/2013
End Date	3/31/2013
Start Time	8 30 AM
Group	<none>
Leader	Dohmen, Chris
Co-Leader	<none>
★ Allow Registration	<input checked="" type="checkbox"/>
★ Registration Requires Logged In	<input checked="" type="checkbox"/>
Registration Deadline	
Price	0.00
Non-member Price	0.00
★ Available Tickets	9
Only Admin	<input type="checkbox"/>
★ Active	<input checked="" type="checkbox"/>
Trip Type	Hike
Hike Class	B
Difficulty	Easy
Level	
Trip Prerequisite	
Trip Pace	No Pace
Trail Mileage (round trip)	8
Elevation Gain	1500
Drive Distance (round trip)	16
Topo Map 1	Kassler
Topo Map 2	
Topo Map 3	
Wilderness Restriction	<input type="checkbox"/>
Need Confirm	<input type="checkbox"/>
LIT	<input type="checkbox"/>
Register With Leader	<input type="checkbox"/>
Guests OK	<input checked="" type="checkbox"/>
Pass Code	
Roster Date	
Roster Notes	

★ Indicates Important and/or required.

“**Allow Registration**” On-line. Do Not Click if Register by leader.

“**Registration Requires Logged in**” trip for members only

“**Available Tickets**” is the number of people you want on the trip. You can adjust this at any time.

“**Active**” is Visible On-line.

## Step by Step Instructions -- Updated June 19, 2013

**NOTE: \*\* REQUIRED for the trip to show up in the ON-LINE calendar.**

**TIP: As in all Computer work, SAVE FREQUENTLY!** Complete \*\* items first, then click “update” before putting in all the information. After “update,” You will be back at the trip admin page. Click “EDIT” on your trip to fill in the details.

### 1. LOGIN AS TRIP ADMIN

Go to [www.cmc.org](http://www.cmc.org). Log in with your member id and password. You’ll find the log-in box on the home page in the right-hand sidebar. You will land on the Member Dashboard page.

2. On the top right, above the search box, click on “**Trip Leader Admin.**”

### 3. CLICK “MANAGE TRIPS”

Under “Manage Trips” you will see a screen that says “Trip Search”

#### CLICK “ADD EVENT”

The Edit Event Page looks like page 2 in this document. Complete the following fields in the Edit Event Page:

- A. **\*\* TYPE** – Select Trip
- B. **\*\*STATUS** – Approved, Cancelled, or Complete. For a new trip, select “Approved”



- C. **\*\*TITLE** – FIRST line is seen on the calendar. Be descriptive yet succinct. for example:  
*Raleigh Peak - Off Trail Exploratory*  
*Pikes Peak 3-Day Backpack Trip*  
*Griffith Mtn 11,558' Doggie Hike*

**Title 2** – Put additional descriptions that would be helpful with the classification that A-E or Easy, Moderate, Difficult or Advanced don’t cover.

**Title 3** – Same as Title 2; this is the line where leaders can add a special notice such as School Outing, or a hike/snowshoe series.

- D. **\*\*CATEGORY 1** – Drop down offered. Choose All Trips unless it’s an Adventure Travel trip. All TRIPS is where a member will go to see all of the trips offered by the CMC regardless of group, type, etc.

**Category 2** – Available in case any trip or event falls into two categories. This is an optional provision that was made available because there are several events that fell into two categories.

- E. **\*\*DATE – Day of trip or event.** You can change the date later, if needed.
- F. **Start Time** – Indicate the Trip Start Time. The default is midnight.
- G. **Group** – Denver, Boulder, etc.

YOU ARE HERE: Admin > Manage Events

### EDIT EVENT

Manage

Type: Trip

Status: Approved

Title: RMNP Volunteer Day

Title 2:

Title 3:

Category 1: - All Trips

Category 2: - - Service Projects

Date: 5/7/2013

End Date: 31

Start Time: 12:00 AM

Group: <none>

- Aspen
- Boulder
- Colorado Wilderness Families
- Denver
- El Pueblo
- Fort Collins
- Friends of Colorado
- Friends of Rout. Backcountry
- Gore Range
- Longs Peak
- Pikes Peak
- San Juan
- Shining Mountains
- Western Slope

Leader:

Co-Leader:

Allow Registration:

Registration Requires Logged In:

Registration Deadline:

Member Price:

Non-member Price:

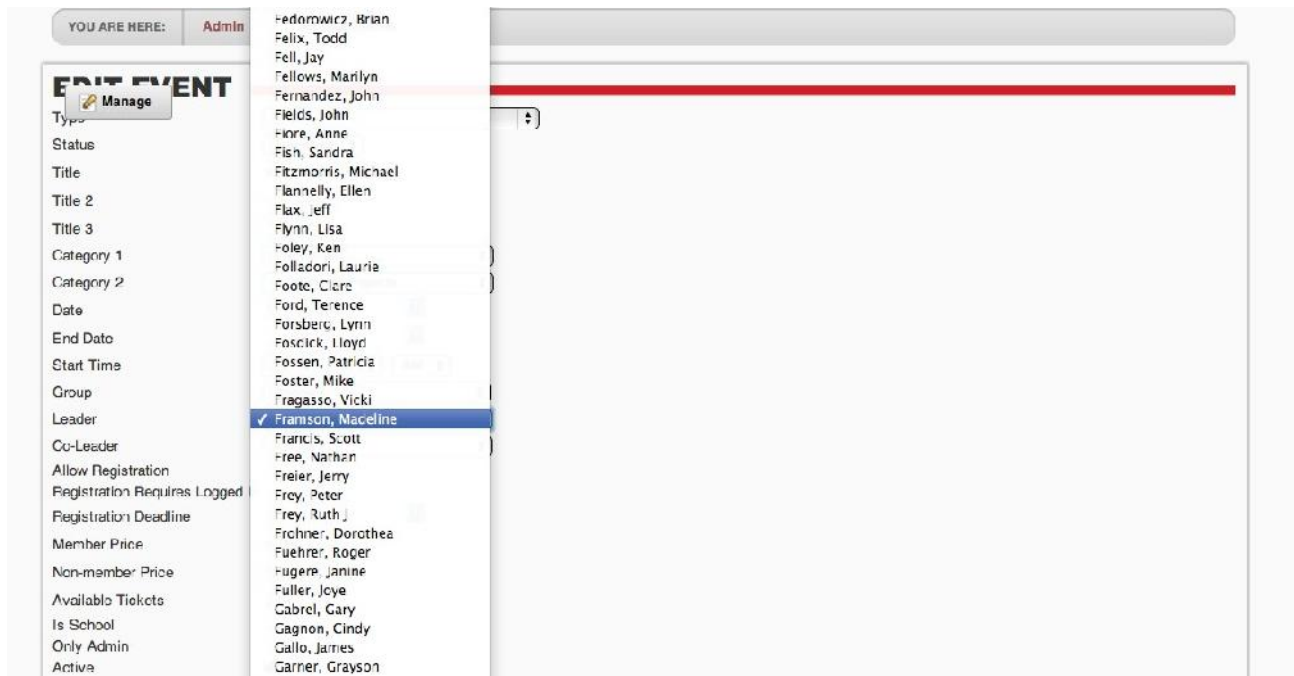
Available Tickets:

Is School:

Only Admin:

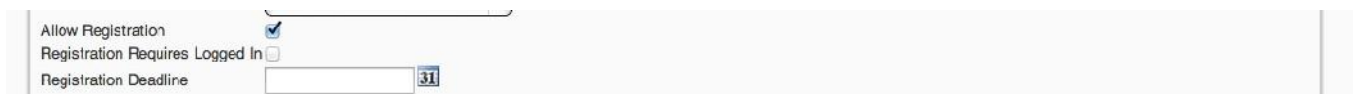
Active:

H. **Leader** – Your Name; Select from the pull down menu.



I. **Co-Leader** – Your co-leader’s name if you have one

J. **\*\*ALLOW REGISTRATION** – This must be checked in order to allow people to register for the trip. With it unchecked, it will show on the calendar, but will not show the registration fields. **If you want the trip to be REGISTER WITH LEADER do not check this box.** Note: people will not be able to see the trip on-line until you select “Active” described below.



K. **Registration Requires Logged In** – Check box if trip is for members only. All members will be asked to log in before signing up. IF you want to allow guests to sign up for the trip on-line, do not check this box.

L. **Registration Deadline** – Last date that registration is open. The registration deadline field can be left empty to allow registrations up to midnight the day of the trip. Entering a date into the deadline field will disable the registration for the event after that date, unless the trip date has already passed.

M. **Price** – Leave blank for regular CMC trips. The trip sign up system is used for Events as well as Trips. Therefore, the price category is applicable only to those Events for which there is a fee.

N. **Non-member Price** – Same as above but for non CMC members attending Events or Programs where a fee is charged.

Member Price	<input type="text" value="0.00"/>
Non-member Price	<input type="text" value="0.00"/>

O. **\*\* AVAILABLE TICKETS** – Available # of participants on trips, or attendees for events. If you do not indicate the number of tickets, the default will say “no tickets left.” **Must include number of tickets even if register by leader.** If the trip is register by leader, it is helpful to go to the website occasionally and update the number of tickets available.

Available Tickets	<input type="text" value="20"/>
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P. **Only Admin** – If you check this box your trip will not be visible by anyone without admin log-in authorization.

Q. **\*\*ACTIVE** – This must be checked to set the trip to Active, so it shows up on the calendar. This allows you to turn trips on and off, or set up trips in advance and not have them be displayed until you’re ready. Active is more or less a “published” or “unpublished” feature. This is similar to the Confirmation status of the previous website scheduling process. If you cancel the trip, unclick the Active box.

Active	<input checked="" type="checkbox"/>
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R. **Trip Type** – Hike, Climb, Ski, etc.

Trip Type	<input checked="" type="checkbox"/> Hike
Hike Class	Ski
Difficulty	Snowshoe
Level	Stewardship
Trip Prerequisite	Climb
Trip Pace	Backpack
Trail Mileage (round trip)	Bike
	Fishing
	All Other

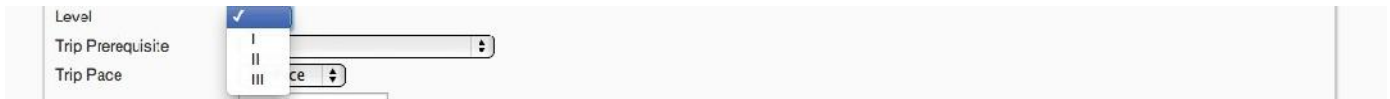
S. **Trip Class** – A-D (Do not use E – instead put EXPOSURE in the trip description and title.)

Hike Class	<input checked="" type="checkbox"/> A
Difficulty	B
Level	C
Trip Prerequisite	D
Trip Pace	E

T. **Difficulty** – Easy, moderate, advanced

Difficulty	<input checked="" type="checkbox"/> Difficult
Level	Easy
Trip Prerequisite	Moderate

U. **Level** – Use for rock climbs and ski trips.



A screenshot of a web form with three dropdown menus. The first menu is labeled 'Level' and has a blue checkmark above it. The second menu is labeled 'Trip Prerequisite' and has a blue checkmark above it. The third menu is labeled 'Trip Pace' and has a blue checkmark above it. The 'Trip Pace' menu is currently open, showing options 'I', 'II', and 'III'.

V. **Trip Prerequisite** – Include if a prereq is required such as BMS.

W. **Trip Pace** – Casual, moderate, fast

X. **Trail Mileage (round trip)** – self explanatory, use only whole numbers

Y. **Elevation Gain** – self explanatory

Z. **Drive Distance (round trip)** – self explanatory

AA. **Topo Map 1** – If you want to add. Same for 2 and 3

**Topo Map 2**

**Topo Map 3**

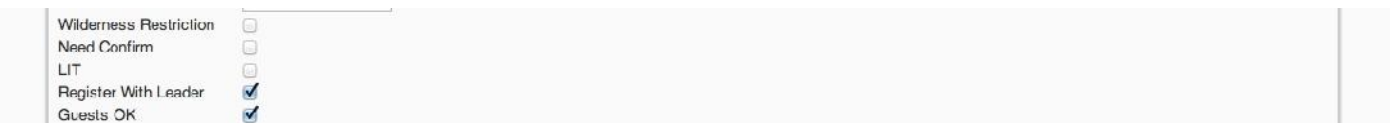
BB. **Wilderness Restriction** – Needs a permit, etc. This does not show up on the details/registration page, so members will not see this when signing up.

CC. **Need Confirm** – If check this, must also add a **“Pass Code.”** Only people who have the pass code will be able to sign up for the trip. This is specifically for trips that are for a pre-selected group of members.

DD. **LIT** – When this box is checked, the trip leader has agreed in advance to coach an LIT on the trip.

EE. **Register With Leader** – if you don’t allow online registration, DO NOT CHECK “Allow registration” #J.

FF. **Guests OK** – You will need to “uncheck” this box if you don’t want guests. It will prefill to allow guests. NOTE: If Guests are ok, be sure that #10, “Registration Requires logged in” is not checked.



A screenshot of a web form with five checkboxes. The first three are unchecked: 'Wilderness Restriction', 'Need Confirm', and 'LIT'. The last two are checked: 'Register With Leader' and 'Guests OK'.

GG. **Pass Code** –Trip leaders, particularly of field days for schools, can set a password so only registered students can sign up. Must also check # 27 Need Confirm above.

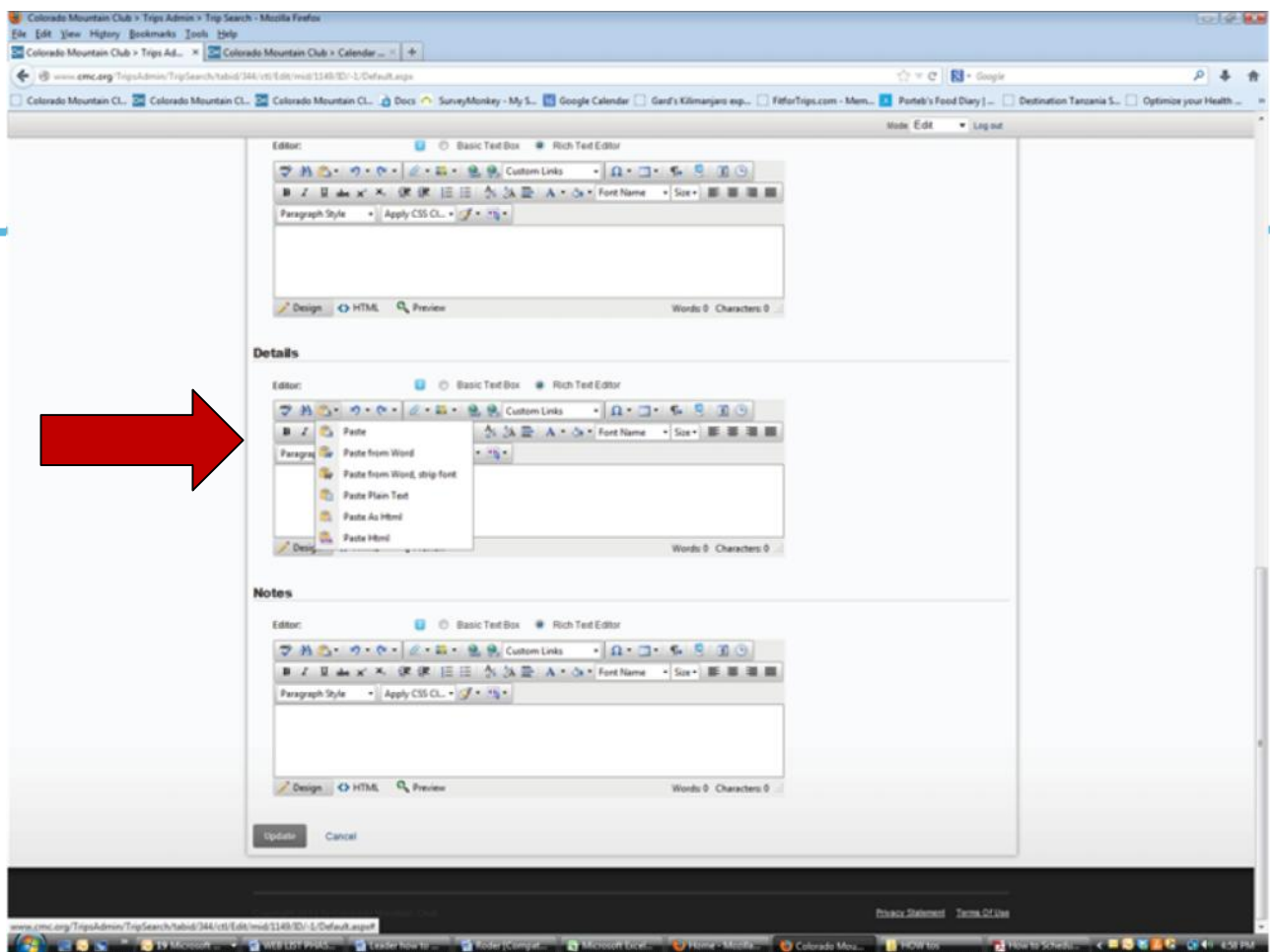
HH. **Roster Date** - Disregard.

II. **Roster Notes** - Disregard.

FOR THE TEXT BOXES USE PLAIN TEXT ONLY. SEE DIRECTIONS & SCREEN SHOT BELOW IF YOU ARE TEMPTED TO COPY FROM A WORD DOCUMENT.

### Steps to copy PLAIN TEXT:

1. Select the text you want using Ctrl C.
2. Go to the text box you want to paste it into and click the arrow beside the paste icon. (see red arrow above.)
3. Select "Plain Text."
4. Scroll down to see the pop-up box. Use CTRL + V to paste below the content you would like to be cleaned into the pop-up box.
5. Click "Paste."





JJ. **Location** – You as the leader will need to add the trip location, and the meeting location. Enter the trip location first, and then the meeting location. This information is available to the public. If you do not want the public to see the meeting location, you can email the trip participants with this information.

KK. **Directions**

LL. **Contact** - Leader’s contact information indicating phone, e-mail, whether phone accepts texts, time of day leaders are willing to accept calls. **This information is available to the public.** Do not list information that you do not want to be public.

MM. **Details** – Add the detailed trip description and all details about the trip that are not included above

NN. **Notes** – More space for extra info. Example “We will stop for a bit to eat in Frisco after the hike.”

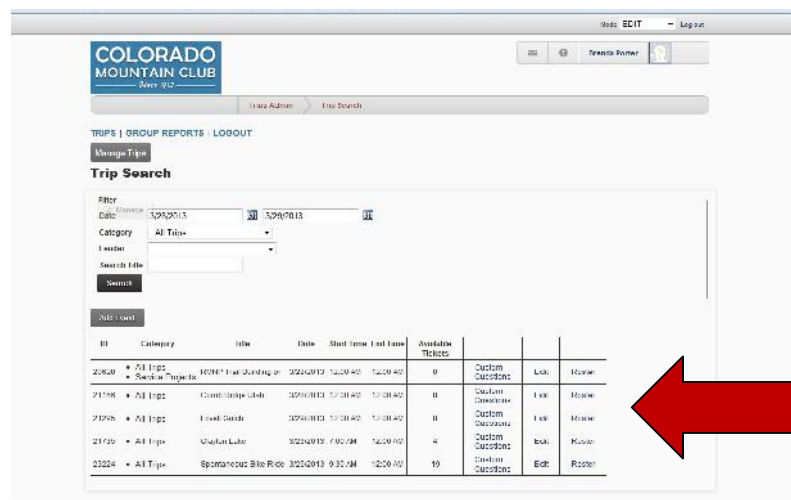
**\* UPDATE – Click Update to enter the trip.**

Once you update the trip, you should see it in the calendar. You can view it immediately, and go back to the Trip admin to EDIT at the right of the trip name to make changes if needed.

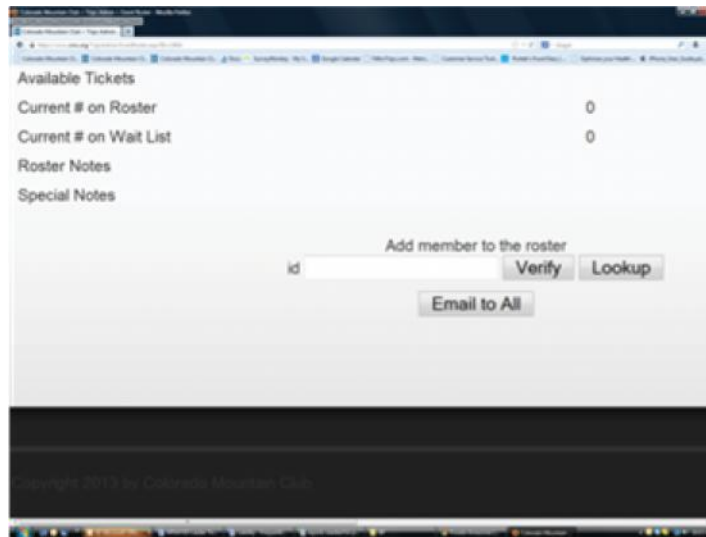
CONGRATULATIONS! YOU ENTERED A TRIP.

## HOW TO ADD A MEMBER TO YOUR ROSTER

1. Log in as a trip leader and click the "Trip Leader Admin" link in the upper right hand corner.
2. Click the “Manage Trips” link to open the list of trips and search filters.
3. Click the calendar icons to select your desired date range.
4. Click the “Roster” link at the far right for the desired trip. This is found next to the “Edit” link.



5. Scroll down until you see the roster.



6. Click "Lookup"
7. Type the member's **last name OR id** into the "Name" search field and click the "Search" button. *Note: we are aware of some glitches around this functionality. Thanks for your patience. If the member's name does not appear, try first name.*
8. Click on the member's name, which will highlight in red.
9. Choose from the dropdown whether the member is going to drive, ride or call the leader.
10. Click the "Add Member" button. This will add the member with their information to the roster and remove one of the available tickets for the trip.
11. Trip leaders can go back at any time and adjust their roster, even if they previously closed the trip. **NOTE: Some members have more than one record** because they have signed up for activities without logging into their member account. **Usually the lowest member id number** is associated with their membership information.

## HOW TO ADD A GUEST TO YOUR ROSTER

(Same steps as described 1-4 above for adding member)

1. Log in as a trip leader and click the "Trip Leader Admin" link in the upper right hand corner.
2. Click the "Manage Trips" link to open the list of trips and search filters.
3. Click the calendar icons to select your desired date range.
4. Find your trip and Click the "Roster" link at the far right for the desired trip. This is found next to the "Edit" link. (see screen shot above.)
5. Scroll down until you see the roster. Click "Add Guest"

6. Complete the information you need in the following form:

The screenshot shows a web browser window with the Colorado Mountain Club website. The page title is 'Colorado Mountain Club - Trips Admin - Event Roster - Member Profile'. The browser address bar shows 'https://www.emc.org/TripAdmin/EventRoster.aspx?ID=2384'. The user is logged in as 'Brenda Porter'. The page has a navigation bar with 'Trips Admin' and 'Event Roster' tabs. Below the navigation bar, there are links for 'TRIPS | GROUP REPORTS | LOGOUT' and a 'Manage Trips' button. The main content area is titled 'Add new Person' and contains a form with the following fields:

First Name	
Middle Name	
Last Name	
Home Phone	
Business Phone	
Email	
Address	
Address2	
City	
State	
ZIP	
Organization	
How Learn	(Select) ▾
Guest Release Liability Signed	<input type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

7. Click "save"

8. Select if the Guest wants to "Ride" or "Drive"

9. Click the "Add Member" button. This will add the Guest with their information to the roster and remove one of the available tickets for the trip.

## HOW TO CANCEL A PARTICIPANT FROM YOUR ROSTER

Click the "Cancel" link at the bottom right of the member info box on the roster page. This will show that the member's registration has been cancelled and will return the ticket to the available tickets number.

## HOW TO MANAGE YOUR WAITLIST

1. If you want to move one or more people from the top of your waitlist onto the roster, go into the “Edit Trip” and change the number of “tickets available” to the number of people on the roster. NOTE: This will become the default number of people on the trip. OR
2. You can manually add the person to the trip as described above, and cancel them from the waitlist.

## HOW TO E-MAIL EVERYONE IN THE ROSTER LIST

Click the “E-mail to All” button, which will open the e-mail page. On the e-mail page, enter your subject and the e-mail message, and then send the “Send E-mails” button.

NOTE: CURRENTLY THERE IS NO AUTOMATIC EMAIL SENT TO TRIP PARTICIPANTS PRIOR TO THE TRIP.

## HOW TO COMPLETE TRIP REPORT

1. Bring your trip up on the trip admin page, using sort by date.
2. Click “Edit.”
3. Change the Status to “Complete.”
4. Click “Update” (scroll down to the bottom of the page to see update).
5. That will take you back to the list of trips on the trip admin page.
6. Click “Roster.”
7. Add members to the roster, if needed (see directions above) and/or note “No Shows.”
8. Type in the number of hours, notes or problems.
9. Click “Save Roster.”
10. If you had an incident or accident on the trip, please MAIL the CMC Incident Report Form to the Golden office. **DO NOT COMPLETE THE ONLINE FORM** that appears when you click the box next to incident.

## HOW TO CANCEL A TRIP

1. Bring your trip up on the trip admin page, using sort by date.
2. Click “Edit.”
3. Change the Status to “Cancel.”

4. **\*\*UNCLICK “Allow Registration”**
5. **\*\*UNCLICK “Active”**
6. Click “Update” (scroll down to the bottom of the page to see update).

## HOW TO DUPLICATE A PAST TRIP TO A NEW DATE

1. Bring the trip you want to duplicate up on the trip admin page, using any combo of search criteria: trip name, leader name, date trip was offered.
2. Click “Duplicate.”
3. Change the date to the new date desired.
4. Check all of the fields and details to make sure they are correct.
5. Click “UPDATE” to save new trip.

The screenshot shows the 'Trip Search' page in the Colorado Mountain Club admin interface. The search filters are set to Date: 6/1/2010, Category: All Trips, Leader: Jagger, Linda, and Search Title: yale. The search results table is as follows:

ID	Category	Title	Date	Start Time	End Time	Available Tickets	Active	Custom Questions	Edit	Duplicate	Roster
24184	All Trips	Mt Yale	6/15/2013	12:00 AM	12:00 AM	10	Yes				

A red arrow points to the 'Duplicate' button in the table row for ID 24184.

**CMC TRIP LEADERS, THANK YOU FOR ALL YOU DO FOR THE CMC!**