

## GUIDE TO ADDING A TRIP TO THE CMC WEBSITE

**INCLUDES HOW TO: Schedule a Trip, Duplicate a Former Trip, Complete/Close a Trip  
Manage your Trip Roster: Add Guests and Members**

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## QUICK TIPS & IMPORTANT REMINDERS















- **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.
- **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. 17.
- **For the trip to BE VISIBLE and allow people to register for the trip ON-LINE,** you must have clicked/entered the following fields: (See Screen Shot on next page.)
  1. TYPE (trip)
  2. STATUS (approved)
  3. TITLE (XYZ Peak)
  4. DATE (00/00/0000)
  5. CATEGORY I (All Trips)
  6. ACTIVE
  7. ALLOW REGISTRATION
  8. AVAILABLE TICKETS
- **Text with Word/html formatting creates problems throughout the web system,** so if you want to copy text from a Word document into a trip description **COPY ONLY PLAIN TEXT.** (See page 9 for directions).
- **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.”
- **ADD A MEMBER to your roster,** please follow the directions and use the person’s last name OR member ID. 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 or made a purchase without logging into their member account. Usually the lowest member ID number is associated with their membership information.
- **MANAGE WAITLIST:** To add someone to the waitlist, go to waitlist. Type in their name, click “look-up.” Select the name of the member, whether they want to ride or drive and then click “add member.” To delete someone from the waitlist, click “delete” by their name.
- **Currently there is NO AUTO TRIP REMINDER EMAIL sent to trip participants 24 hours prior to the trip. Please plan to send an email prior the trip to your participants.**
- **TIP: As in all Computer work, SAVE FREQUENTLY!** Complete **\*\*** items (listed on page 3) 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

Breadcrumbs to use for navigating between edit trip, roster and waitlist.

Roster | Waitlist

## EDIT EVENT

	Type *	Trip
	Status	Approved
	Title *	Mountain Fun
	Title 2	
	Title 3	
	Category 1 *	- All Trips
	Category 2	
	Date *	6/10/2014
	End Date	
	Start Time *	3:00 AM
	Group *	State CMC
	Leader *	Porter, Brenda
	Co-Leader	<none>
	Allow Registration	<input checked="" type="checkbox"/> (for On-line registration; do not click if the trip is "re
	Registration Requires Logged In	<input type="checkbox"/> (click if for members only)
	Registration Deadline	
	Available Tickets *	5
	Is School	<input type="checkbox"/>
	Only Admin	<input type="checkbox"/>
	Active	<input checked="" type="checkbox"/> (Will not be visible on the calendar unless clicked; u
	Trip Type	Hike



Indicates IMPORTANT AND REQUIRED.

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



Indicates IMPORTANT:

“Active” On-line Visibility.

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

“Registration Requires Logged in” trip for members only

“Status” – used for reporting purposes

“Type” only “Trip” shows up on quick trip search function

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

**TIP:** As in all Computer work, SAVE FREQUENTLY! Complete \*\* items (see page 3 for screen shot) 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**

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”

**4. CLICK “ADD EVENT”**

The Edit Event Page looks like page 3 in this document. Complete the following fields in the Edit Event Page:

**A. \*\* TYPE – Select “Trip”** NOTE: Only “Trips” are visible in the “Quick trip” search. *Do not select any other category.*

**B. \*\*STATUS – Approved, Cancelled, or Complete. For a new trip, select “Approved”** (Leaders now approve their own trips.)



**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.

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

**D. \*\*CATEGORY 1** – Drop down offered. Choose “All Trips” unless it’s an Adventure Travel trip.

Category 2 – Do NOT USE except for special circumstances, such as service trips. This field is 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.

**End Date** -- Not currently used. Type this into the trip description below if it is a multi day trip.

**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

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:

Start Time: 12:00 AM

Group: <none>

- Aspen
- Boulder
- Colorado Wilderness Families
- Denver
- El Pueblo
- Fort Collins
- Friends Of Colorado
- Friends of Routt 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:

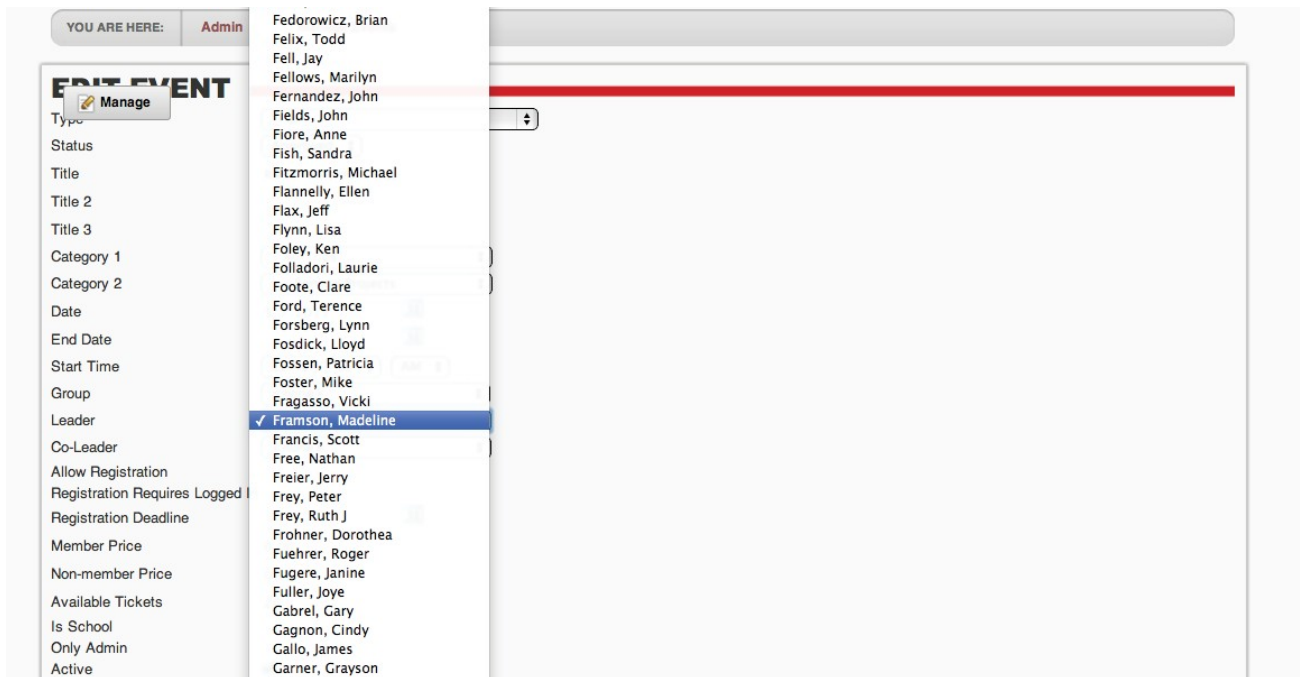
Available Tickets:

Is School:

Only Admin:

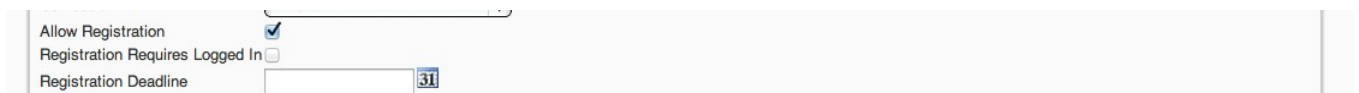
Active:

**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 and also indicate the trip is “Register With Leader” in the Notes section 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** – This field is no longer available, as all regular CMC trips are free.

**N. Non-member Price** – Same as above.

**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.

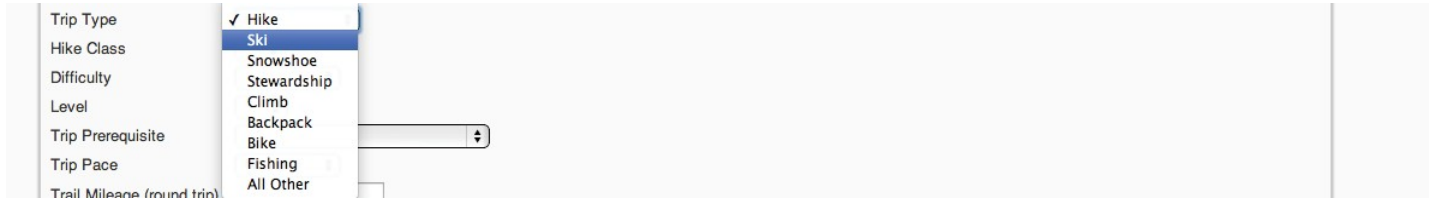
Available Tickets

**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. If you cancel the trip, unclick the Active box.

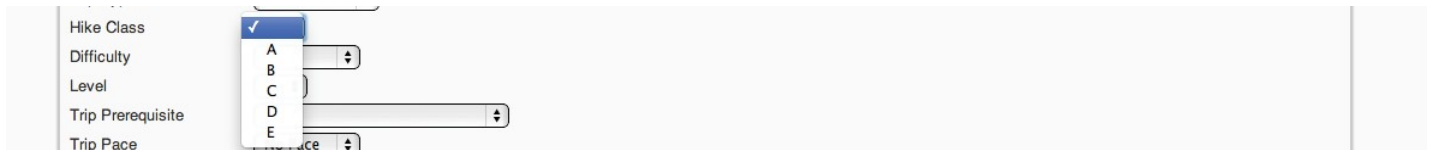
Active

**R. Trip Type** – Hike, Climb, Ski, etc.



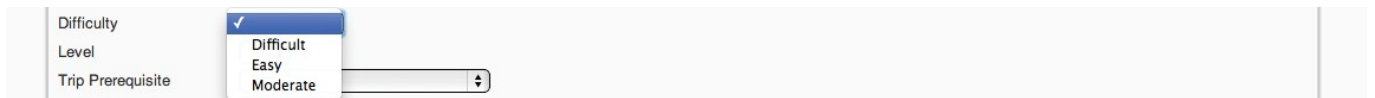
A screenshot of a web form showing a dropdown menu for 'Trip Type'. The menu is open, displaying several options: Hike (checked), Ski, Snowshoe, Stewardship, Climb, Backpack, Bike, Fishing, and All Other. Other form fields like 'Hike Class', 'Difficulty', 'Level', 'Trip Prerequisite', 'Trip Pace', and 'Trail Mileage (round trip)' are visible in the background.

**S. Hike Class** – Indicate the hike classification A-D (Do not use E – instead put EXPOSURE in the trip description and title.) This is used only for hikes. Leave blank for other types of trips.



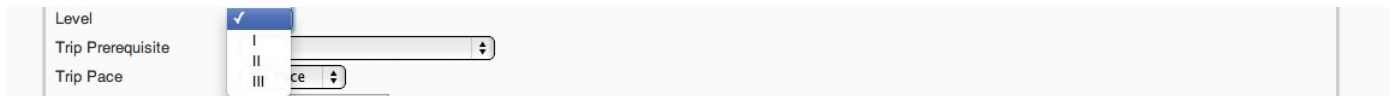
A screenshot of a web form showing a dropdown menu for 'Hike Class'. The menu is open, displaying options A, B, C, D, and E. Option A is checked. Other form fields like 'Difficulty', 'Level', 'Trip Prerequisite', and 'Trip Pace' are visible in the background.

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



A screenshot of a web form showing a dropdown menu for 'Difficulty'. The menu is open, displaying options Difficult, Easy, and Moderate. Option Difficult is checked. Other form fields like 'Level' and 'Trip Prerequisite' are visible in the background.

**U. Level** – Use for rock climbs and ski trips. Leave blank for other types of trips.



A screenshot of a web form showing a dropdown menu for 'Level'. The menu is open, displaying options I, II, and III. Option I is checked. Other form fields like 'Trip Prerequisite' and 'Trip Pace' are visible in the background.

**V. Trip Prerequisite** – Disregard; currently not functional

**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)** – From carpool location to Trailhead

**AA. Topo Map 1, 2, 3** – Disregard; currently not functional

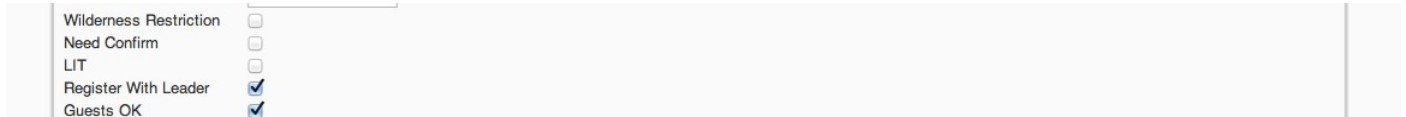
**BB. Wilderness Restriction** – Needs a permit, etc. This does not show up on the details/registration page, so members will not see this when signing up.

**CC. Need Confirm** – If you check this, you must also add a “Pass Code.” Only people who have the pass code will be able to sign up for the trip. (See “GG. Pass Code” below

**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” See “J” above.

**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.



Wilderness Restriction	<input type="checkbox"/>
Need Confirm	<input type="checkbox"/>
LIT	<input type="checkbox"/>
Register With Leader	<input checked="" type="checkbox"/>
Guests OK	<input checked="" type="checkbox"/>

**GG. Pass Code** – Trip leaders can set a password which they provide to people they have screened. Only participants with the pass code can sign up. Also check “CC. Need Confirm” above to require all participants to use the passcode.

**HH. Roster Date** - Disregard.

**II. Roster Notes** - Disregard.

**JJ- NN TEXT BOXES:** For the following six text boxes type directly into the text box, or copy plain text only. SEE Copy Plain Text Directions and screen shot below if you are tempted to copy text from a word document.

Note: We recommend clicking the “Update” button at the bottom of your page to save your work so far.

**JJ. Location** – Enter the trip meeting location.

**KK. Directions** -- Do not enter information in this field. Include directions in “MM. Details” below.

**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.” If your trip is “Register with leader” please include that info here, as it does not automatically indicate register with leader.

\* **UPDATE** – Click Update to enter the trip. (Note, we recommend that you “Update” frequently.

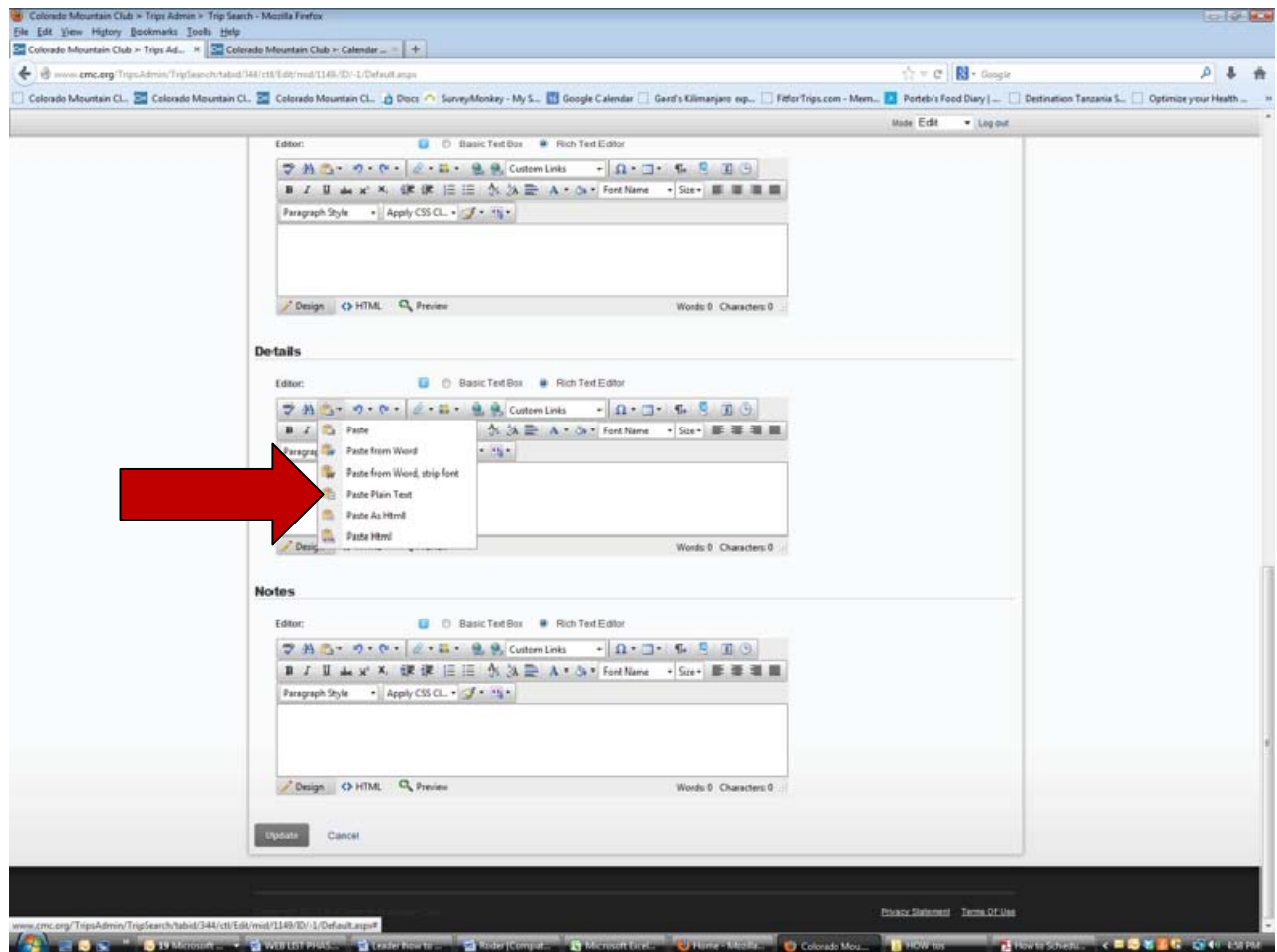
Once you update the trip, you should see it in the calendar. You can view it immediately, and go back to the Trip admin to EDIT at the right of the trip name to make changes if needed.

**YOU ENTERED A TRIP --CONGRATULATIONS!**



## COPY/PASTE 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 below.)
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.”



## 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.

[Add Event](#)

	ID	Category	Title	Date	Start Time	End Time	Available Tickets	Active				
<a href="#">Delete</a>	27600	■ All Trips	Rise & Shine Series Training Event	6/12/2014	4:30 AM	12:00 AM	4	Yes	Custom Questions	Edit Duplicate	Roster	
<a href="#">Delete</a>	27637	■ All Trips	Bear Creek Trail Cycling	6/12/2014	7:00 AM	12:00 AM	2	Yes	Custom Questions	Edit Duplicate	Roster	

5. Scroll down until you see the roster.
6. Click "Lookup"

Available Tickets  
Current # on Roster: 0  
Current # on Wait List: 0  
Roster Notes  
Special Notes

Add member to the roster

id

7. Type the member's last name or ID into the "Name" search field and click the "Search" button. 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.

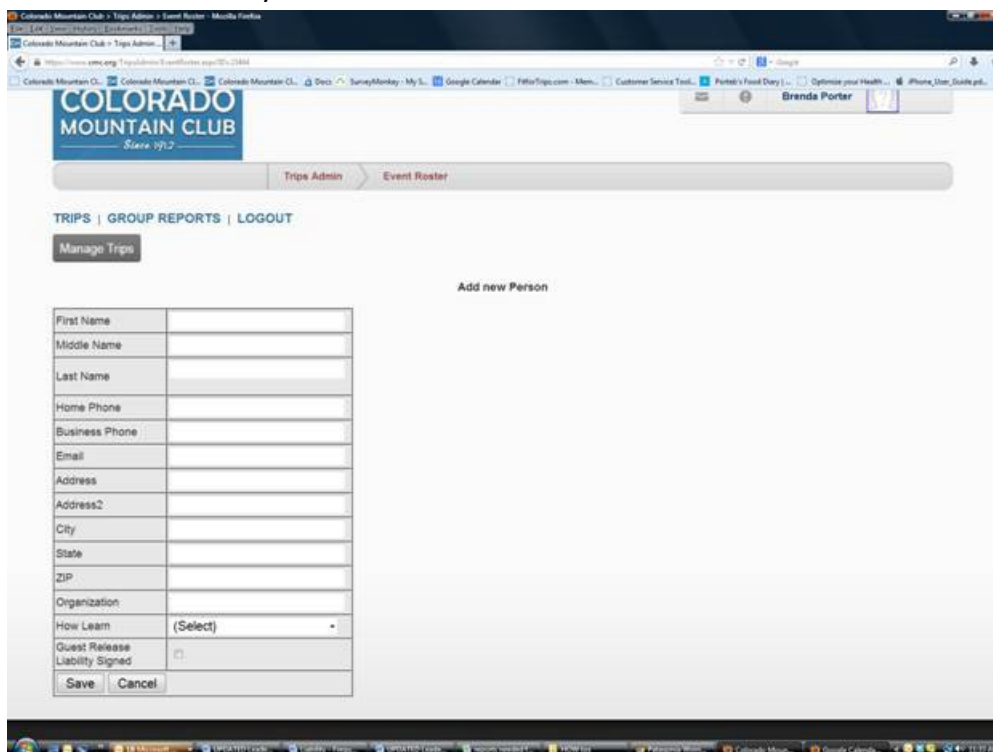
Trip leaders can go back at any time and adjust their roster, even if they previously closed the trip.

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 to Roster"



The screenshot shows a web browser window displaying the Colorado Mountain Club website. The page is titled "Event Roster" and features a navigation bar with "Trips Admin" and "Event Roster" links. 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"/>
Save	Cancel

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

7. Click "save"

## 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

There are two ways to manage your list:

1. If you decide to increase the number of "tickets available" on the Edit Event screen, that number of people will automatically move from the waitlist to the trip roster.
2. If you want to move a specific person from the waitlist to the trip roster, click "add member" next to that person's name. By "adding member" the ticket number is reduced, and the person is removed from the waitlist and added to the trip roster. *There is no longer a need to change the number of tickets to accommodate your waitlist.*

[Trips Admin](#) > [Event Wait List](#)

[TRIPS](#) | [GROUP REPORTS](#) | [LOGOUT](#)

[Manage Trips](#)

### Wild Land Adventures June 9-13 (Approved)

Add member to the wait list

id  [Verify](#) [Lookup](#)

[Export to Excel](#) [Email to All](#)

Name	Signup Date	Phone	Email		
Van Keith	5/18/2014 9:01:11 AM	303-590-5333	<a href="mailto:Dianehighlandhealth@gmail.com">Dianehighlandhealth@gmail.com</a>	<a href="#">Delete</a>	<a href="#">Add Member</a>



## 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 reminder email sent to trip participants 24 hours prior to the trip.

## HOW TO COMPLETE TRIP REPORT -- THIS IS IMPORTANT!

*By completing your trip reports, you provide vital information about the CMC's participation!*

Bring your trip up on the trip admin page, using sort by date.

Click “Edit.”

Change the Status to “Complete.”

Click “Update” (scroll down to the bottom of the page to see update).

That will take you back to the list of trips on the trip admin page.

Click “Roster.”

Add members to the roster, if needed (see directions above) and/or note “No Shows.”

Type in the number of hours, notes or problems and other relevant trip information.

Click “Save Roster.”

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. If t

## HOW TO CANCEL A TRIP

Bring your trip up on the trip admin page, using sort by date.

Click "Edit."

Change the Status to "Cancel."

\*\*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

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.

Click "Duplicate."

Change the date to the new date desired.

Check all of the fields and details to make sure they are correct.

Click "UPDATE" to save new trip.

The screenshot displays the 'Trip Search' page of the Colorado Mountain Club. The search filters are set to Date: 6/1/2010, Category: - All Trips, Group: (empty), 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				
24184	All Trips	Mt Yale	6/15/2013	12:00 AM	12:00 AM	10	Yes	Custom Questions	Edit	Duplicate	Roster

A red arrow points to the 'Duplicate' button in the actions column of the first row.

**TIPS FOR ENTERING A STEWARDSHIP TRIP IN THE CMC WEBSITE**

**EDIT EVENT**

Type \* Trip

Status Approved

Title \* USFS South Platte trailwa

Title 2 Ben Tyler Trail

Title 3

Category 1 \* - All Trips

Category 2 - - Service Projects

Date \* 6/14/2014

End Date 6/14/2014

Start Time \* 7 30 AM

Group \* Denver

Leader \* Motzer, Jean

Co-Leader Mills, James

Allow Registration  (for On-line registration; do not click if the trip is "register by leader" or is cancelled)

Registration Requires Logged In  (click if for members only)

Registration Deadline 6/13/2014 31

\* Note: Negative prices will not be displayed. Zero (\$0.00) prices will be Fr

Available Tickets \* 8

Is School

Only Admin

Active  (Will not be visible on the calendar unless clicked; unclick if the trip is cancelled)

Trip Type Stewardship

Hike Class

Difficulty Moderate

**IMPORTANT! Use this guide so your trips will show up properly when searching for stewardship trips on the calendar:**

**Type= Trip**

**Category 1= All Trips**

**Category 2= Service Projects**

**Trip Type=Stewardship**