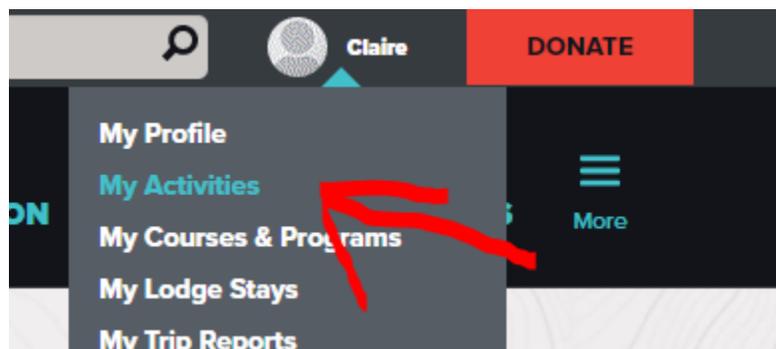


Colorado Mountain Club Olympian Web Instructions

Lesson 5: Managing a roster

Lesson 5: Managing a roster

1. Find your trip that you wish to review
 - a. Hover over your name and select “My Activities”



2. Review upcoming trips
 - a. Here you will see both upcoming and completed trips that you led and participated in. The red arrow shows upcoming and the green shows your past trip history

ACTIVITIES

Filters

Category: **All** Trips Lectures, field trips, clinics & seminars Events

Show canceled

Show only activities that need to be closed

Date Range: -

DATE	ACTIVITY/EVENT	LEADER	ROLE	STATUS
Thu, Aug 4, 2022	Backpack – Bierstadt, Mt	Claire Joseph	Primary Leader	Registered

MY ACTIVITIES HISTORY

DATE	ACTIVITY/EVENT	LEADER	TRIP RESULT	ROLE: RESULT	FEEDBACK
May 26, 2022	Hiking – Abyss Trail to Abyss Lake	Jeff Flax		Participant	Give
May 12, 2022	Backpack - Shabang	Claire Joseph		Primary Leader	
Apr 29, 2022	Climb - Knuckle Crack	a keil		Participant	

- I will be managing my upcoming Bierstadt Backpack trip
- Once you click into your trip you can manage all trip activity.
 - Scroll midway down the page to view your “Manage Activity” functions on the right hand side.
 - Pro tip:** Only the leader of each trip can view this panel on the trip page.
 - Here we will be covering the Manage Roster and Email Participants buttons.

MANAGE ACTIVITY

- MANAGE ROSTER**
- EMAIL PARTICIPANTS**
- EDIT ACTIVITY**
- CLOSE ACTIVITY**
- CANCEL ACTIVITY**
- LEAD ACTIVITY AGAIN**

5. Both buttons, Manage Roster and Email Participants, will bring you into the Roster as you see below:

ROSTER: BACKPACK – BIERSTADT, MT

THU, AUG 4, 2022

[BACK TO ACTIVITY VIEW](#)

[+ ADD PERSON TO ROSTER](#)

	CAPACITY	AVAILABILITY	REGISTERED	CANCELLATION	PENDING	PAYMENT PENDING	PENDING	OFFERED	STANDBY
PARTICIPANTS	10	9	1	0		0		0	0

LEADERS (1)

<input type="checkbox"/>	NAME	PROFILE PRIVATE	GROUPS	ACTIVITY ROLE	REGISTRATION STATUS	REGISTRATION DATE	REQUESTED INFO	REGISTRATION NOTES	PARTICIPANT RESULT	PARTICIPATION NOTES	VOLUNTEER HOURS	SHOW AS CONTACT
<input type="checkbox"/>	Claire Joseph	Edit or Cancel Review	Admins	Primary Leader		2022-05-31 02:42:48 PM						✓

Selected people: 0

[SEND EMAIL](#)

[COPY EMAIL ADDRESSES](#)

[DOWNLOAD ALL](#)

[PRINT ALL](#)

6. + Add Person to Roster

- a. If you have anyone you wish to add to your roster manually, here is where you can do so.

[+ ADD PERSON TO ROSTER](#)

- b. This can be members, leaders and/or guests. Both will have accounts with the CMC.
- c. You might enter a name and notice while testing that they have multiple results. If you know the individual's username this will help to pinpoint which account is active.

ADD PERSON TO ROSTER

■ = required field

Name ■

Enter the first and last name of the person you are adding to the roster. It may take a few seconds for results to appear.

Current path: [Home](#)

Roberta Farrington

Roberta Farrington (testing@cmc.org)

- d. Waiver alert

- i. Please note, that if you try to register a participant (member or guest) that has not yet signed the CMC waiver, you will receive the following alert:

ADD PERSON TO ROSTER



There were some errors.

This participant must sign the waiver before they can be registered.

■ = required field

Name ■

Enter the first and last name of the person you are adding to the roster. It may take a few seconds for results to appear.

Current path: [↑](#)

✕ Madeline Bachner Lane (testing@cmc.org)

e. Admin

- i. If you are registering a co-leader that you wish to have editing access, you can grant them so by clicking the following box when adding them to the roster.

Groups

Check this box to allow this person to edit the activity details and roster, and to view feedback and incident reports submitted for this trip.

Admins

f. Activity role

- i. You can also specify the role of this registered individual

Activity Role ■

Participant

Primary Leader

Co-Leader

Assistant Leader

Mentored Leader

Instructor

Participant

Chaperone

g. Activity Registration Status

- i. When adding a participant, this will auto-populate to “Registered” status.
- ii. However, you can update the individual’s status at any point as needed.

Activity Registration Status ■

Registered ▲

Registered
Standby
Payment Pending
Offered
Cancellation Pending
Canceled

- h. Registration Date can be updated as needed, though it will automatically enter the current date/time

Registration Date

31 / May ▼ / 2022 03 : 46 : 51 PM ▼

- i. Requested Info (optional)
 - i. Any additional questions regarding the trip that the participant asked can be answered here. Participants will be notified once they are added to the roster

Requested Info

Additional info requested from the participant.

- j. Registration Notes (optional)

Registration Notes

Optional. Enter any pertinent info about this person's registration such as "Fee Waived by Martin Mountaineer" or "missed first field trip." Participants can NOT see or access these notes.

- k. Participant Result
 - i. This will be managed later when you Close your trip. Learn how to do so here. (hyperlink coming soon)
 - ii. No need to do anything to this field when adding a person to the roster.

Participant Result

Change this after you "Set Trip Results" on the Roster & Closing page if this person's result is different from the overall trip result.

I. Participation Notes (optional)

Participation Notes

Enter pertinent notes about the participant's performance. This could be for an individual who performed exceptionally or a student who needs improvement in a particular skill. These notes will be visible to activity leaders and must be objective. Please do not include subjective opinions or refer to temporary health issues that are not relevant to future trip leaders. These notes are intended to identify future activity leaders and to help match participants with trips that are appropriate for their abilities.

m. Volunteer Hours (optional)

- i. This is to be done after the completion of the activity
- ii. No need to do anything to this field when adding a person to the roster.

Volunteer Hours

Enter the number of hours this person spent volunteering for this activity. Include time spent doing administrative tasks before and after the activity as well as the time spent doing the activity.

n. Show as Contact

- i. If the participant you are adding is a co-leader or instructor and you wish to include their contact information on the activity details page, check off this box.

Show as contact

Check this box if this person should be shown as a contact on the activity details page.

o. Badges to assign

- i. Badges are not loaded into the testing site. For those who do not know yet what "badges" are, a future training (not yet on the calendar) on badges will be made available.
- ii. Badges can be rewarded to participants from leaders and instructors, thus if a participant successfully completes the trip/course/school, they will be rewarded a badge. Ex: Scrambling badge

Badges to Assign

These badges will be granted to this user when the activity is closed.

p. Carpooling

- i. Enter the participants carpool preferences, any applicable notes, and any friend they wish to be paired with

Carpool Preference ■

Enter your carpool preference. NOTE: If you set your membership profile to 'private', people will not be able to contact you to coordinate carpooling.

None ▾

Carpool Notes

Please provide general information about where you can meet, how many people you are willing to take if you can drive, and any other relevant information like how you'd personally like to handle cost allocation or if you have recently had pets in the car (for folks with allergies).

Friend Request

q. Click Save

7. Edit or Cancel a participant

a. Once on your roster, click "Edit or Cancel" next to the participant name

PARTICIPANTS (1)

<input type="checkbox"/>	NAME	PROFILE PRIVATE	GROUPS	ACTIVITY ROLE	REGISTRATION STATUS	F
<input type="checkbox"/>	Roberta Farrington	Edit or Cancel Review		Participant		

b. Select Activity Registration Status and select "Canceled"

ROBERTA FARRINGTON ✕

■ = required field

Groups
Check this box to allow this person to edit the activity details and roster, and to view feedback and incident reports submitted for this trip.

Admins

Activity Role ■
Participant ▾

Activity Registration Status ■
Registered ▾
Registered
Standby
Payment Pending
Offered
Cancellation Pending
Canceled

: 21 : 34 PM ▾

c. Make any edits you need to. This form matches the form to add a participant as detailed above.

d. Click Save and return to roster window

- e. Now you will see a separate list with your canceled participants
 - i. **Pro tip:** You can click “Edit or Cancel” again at any time to update the Activity Registration Status for canceled participants if they become available to rejoin the trip

CANCELED (1)

<input type="checkbox"/>	NAME	PROFILE PRIVATE	GROUPS	ACTIVITY ROLE	RS
<input type="checkbox"/>	Roberta Farrington	Edit or Cancel Review		Participant	

8. Review Participants

- a. Leaders have the ability to screen their participants and review a participants profile by clicking on the name of the participant (as shown above). This will show leaders their participants' past experience including badges they have earned and any other information that the participant wishes to highlight on their profile.

Roberta Farrington

PROFILE

Roberta Farrington

Member since: Sep 13, 2021

Branch: [Unaffiliated](#)

testing@cmc.org

COMMITTEES

[▶ Denver](#)

- b. Once we move to the “Production” site, we will review badges and ways to screen trip participants
- c. As you see above, the testing site will not show these details at this point
- d. See example below of a member profile on Mountaineers (neighboring organization)

PROFILE

Will Greenough

- Member since: Mar 1, 1977
- Branch: [Olympia](#)

kayakwill@yahoo.com

PRIMARY ACTIVITIES

- ▶ [Sea Kayaking](#)

COMMITTEES

- ▶ [COVID-19 Vaccine Verification Committee](#)
- ▶ [Olympia Sea Kayaking Committee](#)
- ▶ [Sea Kayaking Summit Group](#)

ADMINISTRATIVE BADGES

- ▶  [COVID-19 Vaccine](#)

AWARD BADGES

- ▶  [2015 Super Volunteer](#) ▶  [2016 "10+ Trips" Key Leader](#)



9. Email all participants

- Check the box to the left of "name" on your roster participant list to select all

PARTICIPANTS (3)

<input checked="" type="checkbox"/>	NAME	PROFILE PRIVATE	GROUPS	ACTIVITY ROLE	REGISTRATION STATUS
<input checked="" type="checkbox"/>	Jeff Flax				Participant
<input checked="" type="checkbox"/>	Graham Ottley				Participant
<input checked="" type="checkbox"/>	Ben Lee				Participant

- Scroll down and select Send Email

Selected people: 3

SEND EMAIL

COPY EMAIL ADDRESSES

DOWNLOAD SELECTED

PRINT SELECTED



- c. Complete the required fields, add an attachment or two if you'd like, and click send

SEND EMAIL ✕

■ = required field

From: Claire Joseph <testing@cmc.org>

To: Jeff Flax, Graham Ottley, Ben Lee

Subject ■

Message ■

Attachment 1
 No file chosen

Attachment 2
 No file chosen

Attachment 3
 No file chosen

SEND

- d. If you only wish to email a specific individual you can select the specific participant in step "a" above.

10. Download participant roster

- a. Check the box to the left of "name" on your roster participant list to select all

PARTICIPANTS (3)

<input checked="" type="checkbox"/>	NAME	PROFILE PRIVATE	GROUPS	ACTIVITY ROLE	REGISTRATION STATUS
<input checked="" type="checkbox"/>	Jeff Flax	Edit or Cancel Review			Participant
<input checked="" type="checkbox"/>	Graham Ottley	Edit or Cancel Review			Participant
<input checked="" type="checkbox"/>	Ben Lee	Edit or Cancel Review			Participant

b. Scroll down and select Download Selected

Selected people: 3

SEND EMAIL

COPY EMAIL ADDRESSES

DOWNLOAD SELECTED

PRINT SELECTED

c. Select whichever option you would like (copy, CSV, Print)

ROSTER: BACKPACK – BIERSTADT, MT

[Back to roster](#)

Search:

FIRST NAME	LAST NAME	PROFILE PRIVATE	EMAIL	HOME PHONE	MOBILE PHONE	PREFERRED PHONE	STREET ADDRESS	CITY	STATE	ZIP
Jeff	Flax		testing@cmc.org		[REDACTED]	Mobile	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Ben	Lee		testing@cmc.org		[REDACTED]	Mobile	710 10th St	Golden	US-O-CO	80401
Graham	Ottley		testing@cmc.org		[REDACTED]	Mobile	123 Fake Street	Golden	Colorado	80401

Showing 1 to 3 of 3 entries

Copy

CSV

Print

Show 10 entries

Previous 1 Next