



Crew Manager

Skippers Manual

Version 2.2
22 March 2019

<http://crew-mgr.com>

Version	Date	Comment
2.2	3/22/2019	Added Regatta Registration Status Report & augmented descriptions
2.1	2/23/2019	Added Participant Report & SMS Text Messaging
2.0	12/31/2018	Updated for WordPress Multisite with many new features
1.2	5/10/2018	Added Crew Email turn On/Off in Setup
1.1	4/21/2018	Corrected typos
1.0	4/20/2018	Originally published



Skipper Directions for Crew Manager

Summary

The Skipper has control over *Crew Manager* setup, the people listed on the site, scheduling the events, the content & details behind the schedule, and assigning crew to the events. In summary, *Crew Manager* works as follows

- Skipper orders [Boat Website subscription online](#) with annual or monthly term options
- Skipper loads Crew Members (via spreadsheet CSV file upload or individually typed in Crew Manager admin panel)
- Skipper setup - designate who has Skipper Rights & setup options
- Load the Season Schedule - All In One Calendar Events (with extra fields for uniform)
- Crew (or Skipper) sets "Availability" for each event - via Crew Manager menu items
- Skipper assigns each available Crew to a position - via Crew Manager menu items
- Skipper designates what to wear and who brings the beer for an event - via Crew Manager menu items
- Automatic Email reminders sent to Crew 36 hours (or as set by Skipper) in advance
- Go Sailing and win races!
- Skipper records race results and posts commentary about the race
- If an Event must be cancelled (e.g. bad weather) the Skipper clicks a *Cancel Event Immediately* button. Crew scheduled for the event are immediately notified via email.

Additional Skipper Features

Fields are included in each Crew member's profile to record mobile phone number, weight, World Sailing (ISAF) Sailor ID, World Sailing Sailor Classification, US Sailing Membership number, shirt size and jacket size. The Skipper may also assign Crew to groups including *Core Crew*, *All Posts* and *Retired*. Settings are available for the Skipper to enter One Design weight limits, and if the Helm weight is included in the limit. These settings allow Skipper menu items to be used when the Skipper is logged in.

- **Regatta Weight Report** - Allows Skipper to see sum of weights for crew assigned to an event. If One Design limits are entered, the amount under/over the limit is shown. Standby crew are shown in a separate list on the same page. It also displays the World Sailing Category declared by each crew member. A button is available to automatically validate the World Sailing Classification for each Crew member using the World Sailing database. Links are provided to the US Sailing and World Sailing profiles for each crew member.
- **Crew Shirt Size Report** - When the Skipper needs to buy swag for the Crew, this report includes a matrix of shirt and jacket sizes for each crew member. The report may be run for the *Core Crew*, *All Posts*, *Active* and *Inactive* (Retired) groups.
- **Crew Position Assignment Report** - A consolidated summary of Crew Position Assignments for a calendar year is available as a one page, printable report. This report counts people against positions for a season and displays a color coded matrix. It is helpful for Skippers who try to balance crew position assignments over a season.



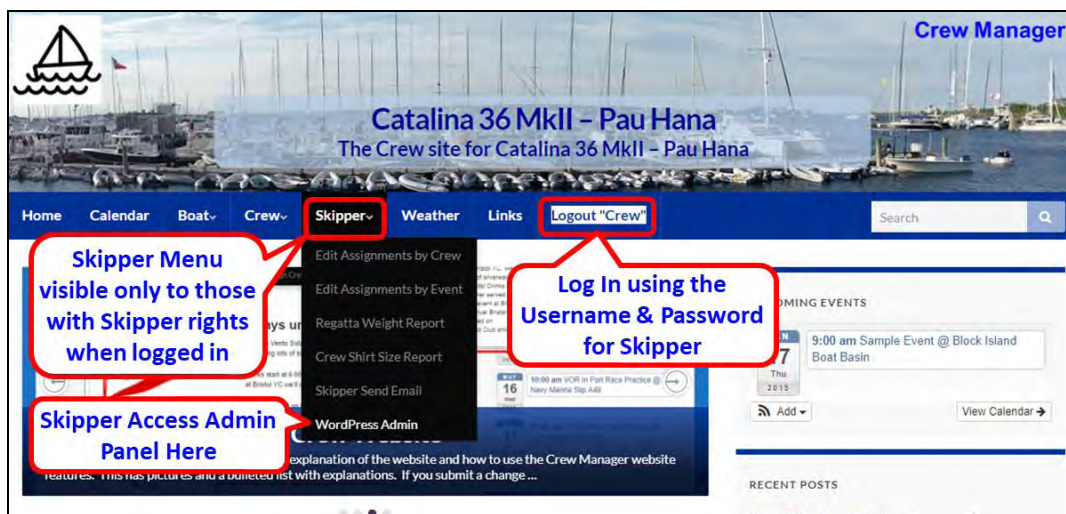
Skipper Directions for Crew Manager

- **Skipper Send Email** - Provides full featured email capability so the Skipper may compose and send messages to Crew associated with any event or the pre-defined groups selected from a drop down menu. No need to look up crew email addresses for entry in your email program, or who is scheduled for a particular event.
- **Regatta Registration Status** - This report is available from the Crew menu to help the Skipper keep track of those events registered and associated fee payments.

Skipper Log In to WordPress Admin Panel

The Skipper and designated Administrators have access to the WordPress Admin panel. Many of the settings are accessed in this area. Accessing the WordPress Admin Panel is as follows.

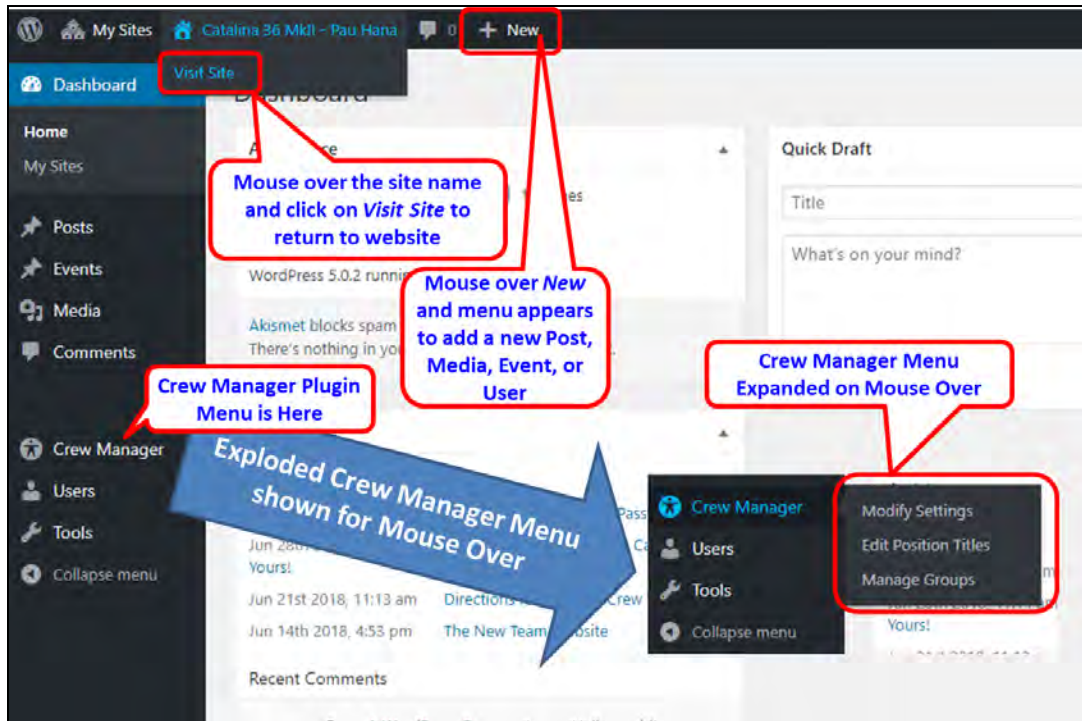
1. Log in to your *Crew Manager* site as the Skipper or Administrator if you have multiple logins. The *Skipper* menu will appear in the menu bar. The *Skipper* menu is not visible to Crew or to people who are not logged in.
2. Once logged in mouse over *Skipper* on the menu and click on *WordPress Admin*





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3. The WordPress Admin screen will load. On the left side there is a WordPress menu. This is where many of the settings described throughout this manual are accessed.



Load Crew Members

Crew Manager is intended to be a “closed” enrollment system - meaning that new users must be entered by the Skipper. This is done to prevent spammers and unauthorized users gaining access to the system using “open” enrollment where anyone may subscribe via the front end. This trade-off requires a little more work for the Skipper to set up, but based on the limited size of typical boat crews, should be easy to manage. Additional crew members may easily be added at a later date. Crew members are regular WordPress users that are automatically assigned the role as a WordPress *Subscriber*. Should the Skipper desire a user to have upgraded website privileges (e.g. to help publish and edit posts, to add and edit users, etc.) a user may be assigned the role as *Crew Administrator* by the Skipper in the user’s profile.

Crew members may be uploaded from a spreadsheet saved as a formatted CSV file, or typed individually. The Skipper has WordPress privileges to enter Crew using either method. Crew Manager uses a limited set of the WordPress user fields (Username, first & last names, nick name, display name & email address) that have been supplemented with fields including the mobile phone number, mobile phone carrier, check box to receive SMS text messages in addition to email, shirt size, jacket size, weight, World Sailing Sailor ID, World Sailing Classification, US Sailing Membership number and a check box where the Crew member may opt out of *All Posts* group emails.

The only information shown to the public (e.g. people who visit the site but are not logged in) is the short display name. The Username and display name fields are usually populated with the



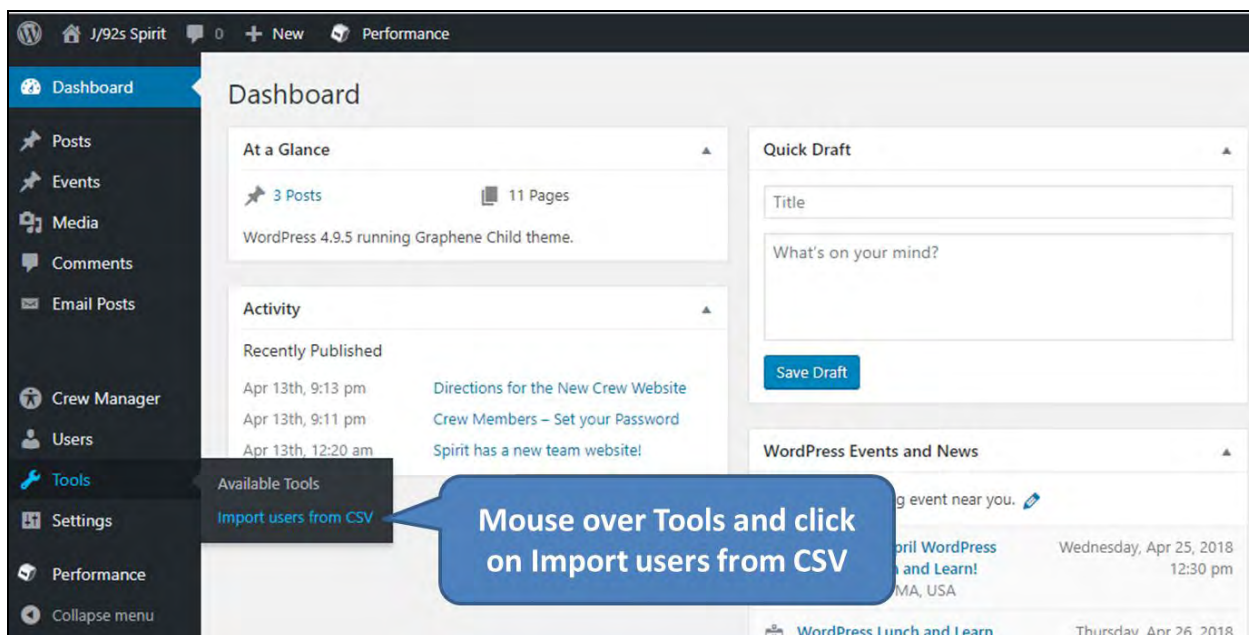
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same information for an individual user. Typically use a nick name such as Bob, Sally, Joe. etc. If you have Crew with the same first name, consider BobR and BobS (first name and first letter with last name). These must be all letters and numbers (e.g. no special characters or spaces). The Username is what a Crew member will use as their log in with their own password. The first and last names, email address and mobile number are only visible to Crew who are logged in. All information that is entered in WordPress may be changed, except for the Username. Once entered, it may not be changed, except by deleting the user and creating a new user.

Uploading Users via Spreadsheet File

The WordPress Plugin “Import users from CSV with meta” is installed which allows a convenient method to import a list of users all at once. This is typically only done when Crew Manager is initially setup for a boat. An Excel spreadsheet template is [available at this link](#) to download and populate with Crew information.

1. Populate each row in the spreadsheet with Crew information under the column names. The only mandatory fields are Username and email. Other fields are optional and may be edited later in the WordPress user’s profile by either the Skipper or the Crew member.
2. Save the spreadsheet, first in native Excel format (allows easier updates in the future), then using the Save As menu option in Excel as a CSV (Comma delimited) (*.csv) text file. Note: Do not include a record with the Skipper username and email that the website was set up with.
3. Log in to your *Crew Manager* site as the Skipper if you have multiple logins.
4. Once logged in mouse over *Skipper* on the menu and click on *WordPress Admin*.
5. The WordPress Admin screen will load. On the left side menu, mouse over *Tools* and click on *Import users from CSV*.



6. The plugin will load and provide a plethora of options. If this is a one time upload, just use the default settings. Click on the *Choose File* button located to the right of the *CSV file (required)* label. When the dialog box opens, navigate to the directory where the CSV



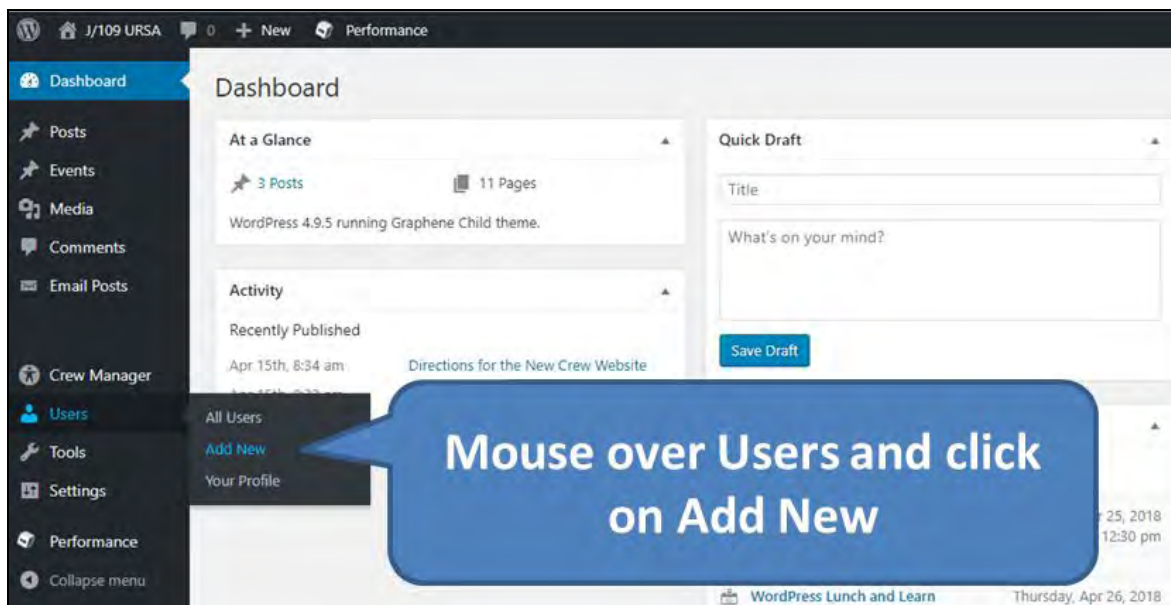
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file containing the Crew was saved and select the file. Click on the blue button at the bottom of the plugin Admin screen labeled *Start Importing*.

7. When the upload is complete, the screen will display the list of Crew that were imported. You may now review and edit any user information by mousing over *Users* and clicking on *All Users*.

Creating Users Individually

1. Log in to your *Crew Manager* site as the Skipper if you have multiple logins.
2. Once logged in mouse over *Skipper* on the menu and click on *WordPress Admin*.
3. The WordPress Admin screen will load. On the left side menu, mouse over *Users* and click on *Add New*



4. Scroll down past the section labeled *Add Existing User* until you reach the section labeled *Add New User*. Enter information in the following fields (* indicates required field):
 - a. *Username
 - b. *Email
 - c. Role (leave as *Subscriber*)
 - d. *Skip Confirmation Email* box - leave unchecked if you want the Crew member to receive an immediate email when the account is created
 - e. Mobile Phone Number
 - f. Mobile Phone Carrier (dropdown selection)
 - g. *Receive SMS Text Messages in Addition to Email* box
 - h. Shirt Size (dropdown selection)
 - i. Jacket Size (dropdown selection)
 - j. Weight in lbs.
 - k. World Sailing Sailor ID
 - l. World Sailing Sailor Classification (dropdown selection)
 - m. US Sailing Membership Number



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- n. *Include on Core Crew Email List* box - Check if you want this crew to receive email messages for the Core Crew group
 - o. *Include on All Posts Email List* box - Check if you want this crew to receive email messages for the All Posts group (this also has new posts emailed to that Crew member)
5. Click the blue button labeled *Add New User*.
 6. Repeat these steps as necessary to add additional users

Skipper Setup - A Summary of Crew Manager Options

Crew Manager has a number of one-time setup options with default settings that may be modified by the Skipper. It also includes utilities to help manage email lists used to notify Crew. The setup options usually only require saving on initial setup, but some may decide to change options later to better meet the needs of the Crew. Some examples of changes that might be made in the future include:

- Notification emails sent to Crew are scheduled for an event 36 hours in advance. The Skipper may decide that time is too far in advance, or not soon enough. The setting can be set to another value (e.g. 24 or 48 hours - use a whole number only).
- The Skipper receives email notifications every time a messages are automatically sent showing the number of emails sent for a particular event or post. This might be useful in the beginning or when trying to localize a mail problem, but may become annoying. This notification can be disabled or enabled at any time.
- The Skipper moves to another place and with the boat in a different time zone. Not real common, but the plugin was designed so Skippers no matter where they are located may set their default time zone.
- The Skipper decides that the Crew position titles need to change, or needs to add another position that isn't on the list. The Skipper may update, add or delete the titles used for Crew position assignments.
- The Skipper decides that Crew not available or not assigned a position should be displayed on the event calendar in addition to Crew available and assigned a position.
- The Skipper has a Webmaster who is part of the crew and wants to include that person on the Crew roster. Conversely, the Skipper might have employed a Webmaster who is not part of the Crew and does not want that person's information displayed on the Crew roster. There is a check box that allows hiding the WordPress administrator from the Crew roster and all lists.

Crew Manager Admin Setup - Modify Settings

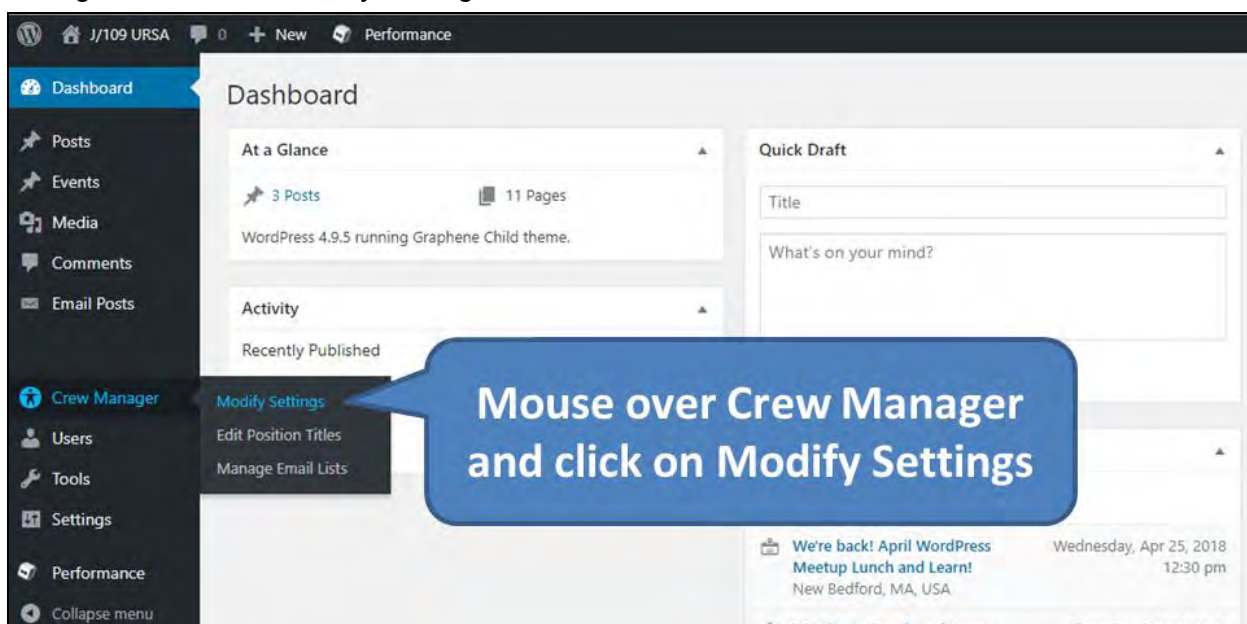
The default settings for Crew Manager are set and saved from this menu. The first time the Skipper logs in to Crew Manager, this screen should be accessed and reviewed, any changes desired entered, and the settings saved. It is a one time action that is only needed again should any of the setting options need to be changed.

1. Log in to your *Crew Manager* site as the Skipper if you have multiple logins. The *Skipper* menu will appear in the menu bar.
2. Once logged in mouse over *Skipper* on the menu and click on *WordPress Admin*

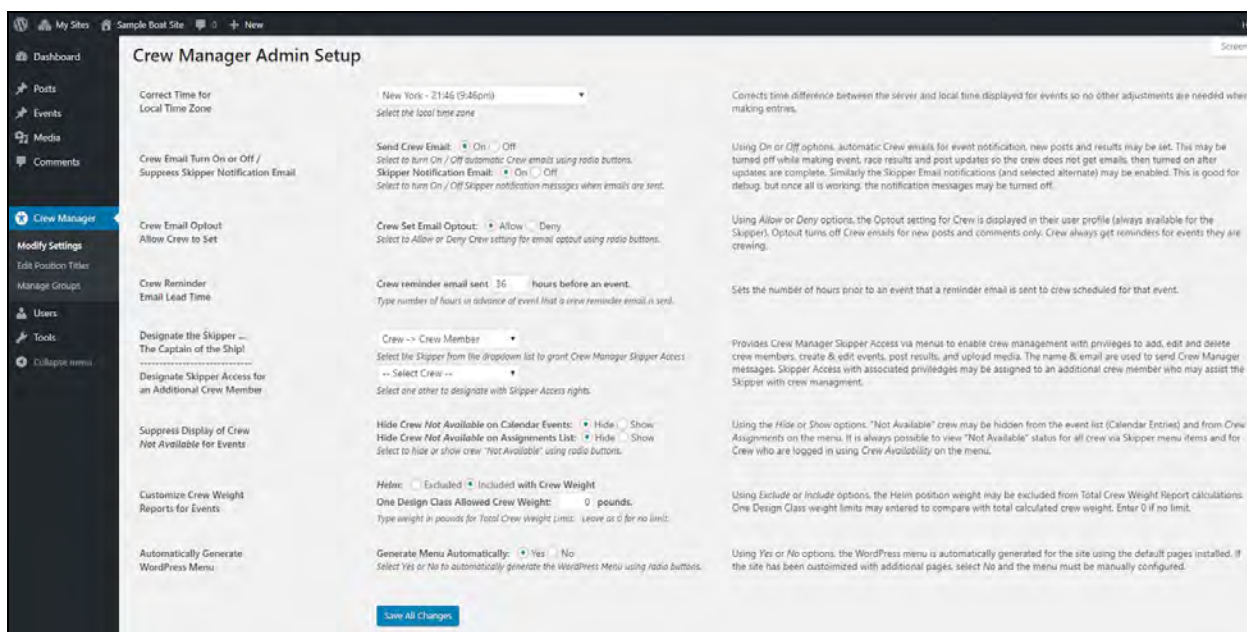


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3. The WordPress Admin screen will load. On the left side menu, mouse over **Crew Manager** and click on **Modify Settings**.



This opens the Crew Manager Admin Setup page where all of the default settings for Crew Manager may be modified. The page is shown below followed by an explanation of the settings that may be modified.



4. **Correct Time for Local Time Zone:** Select the default time zone from the drop down if not New York. The program automatically compensates for the shift between daylight savings and standard time for those time zones that change.
5. **Crew Email Turn On or Off / Suppress Skipper Notification Email:** Using the radio buttons select whether to have crew emails sent for event reminders, notices when



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results are posted, and notices when new posts or comments are posted. The Skipper received a completion report after the emails are sent if the option is *On*. This is good for debug, but once all is working, the notification messages may be turned off.

6. **Crew Email Optout Allow Crew to Set:** This allows the Skipper to enable a checkbox where crew members may opt out of receiving any emails, except event reminders.
7. **Crew Reminder Email Lead Time:** Type in the crew reminder email lead time if not 36 hours for automatic emails sent. Enter the lead time as a whole number.
8. **Designate the Skipper... The Captain of the Ship!:** Using the drop down select who the Skipper is. The Skipper gets access to all the Skipper screens and can manage Crew assignments.
9. **Designate Skipper Access for an Additional Crew Member:** Using the drop down select an additional Crew member who will have Skipper access, if desired. This individual gets access to all the Skipper screens and can manage Crew assignments the same as the Skipper.
10. **Suppress Display of Crew *Not Available* for Events:** Using the *Hide* or *Show* options, "Not Available" crew may be hidden from the event list (Calendar Entries) and from Crew Assignments on the menu. The default setting keeps "Not Available" Crew hidden. It is always possible to view "Not Available" status for all crew via Skipper menu items and for Crew who are logged in using Crew Availability on the menu.
11. **Customize Crew Weight Reports for Events:** This is used for One Design classes that have weight limits. Set the maximum allowed total crew weight in lbs. Click the appropriate radio button to include or exclude Helmsman's weight in the total.
12. **Automatically Generate WordPress Menu:** This option is only visible to users with administrative access (not the default for Skippers). This allows customization of the website with additional menu pages. Leave this *On* if no custom pages are used. Turn *Off* with custom pages. A menu must be built manually using the WordPress menu settings.
13. When all the settings are as you desire, click the blue button at the bottom labeled *Save All Changes*.

Crew Manager Admin Setup - Edit Position Titles

The Crew Manager plugin loads a number of crew positions that may be assigned by the Skipper. The titles on the crew positions may be edited, deleted or new positions added. A word of caution: Deleting a position title that any crew member has been assigned to for an event will require that the crew member be assigned to another position.

There are four position titles with special functions that are not displayed on the editing screen. These may not be deleted or modified.

- *Helm* is used for One Design weight calculations and may not be deleted. It may be included or excluded from the calculation.
- *Not Assigned* is default for crew not yet assigned to a position by the Skipper. The row is color coded with a white dot / white background.
- *Standby Crew* is assigned by the Skipper for crew who may be scheduled for the event, but not yet confirmed. The crew member must verify with the Skipper the day of the



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event if still coded as *Standby Crew*. The row is color coded with a yellow dot / yellow background.

- *Stay Ashore* is assigned when there are too many crew with availability set to Yes. This designates a crew member who is not on the boat for the event. The row is color coded with a red dot / pink background.

Any crew member who has indicated *Yes* for availability and is assigned a position by the Skipper designates a crew member confirmed for the event. The row is color coded with a green dot / green background, unless assigned the position of *Standby Crew* or *Stay Ashore*.

Any crew member who indicated *Maybe* for availability and is assigned a position by the Skipper designates a crew member as possible for the event. The row is color coded with a yellow dot / yellow background. If the individual changes availability to *Yes* the position is confirmed and the row is color coded with a green dot / green background.

Assuming you are already logged in as the Skipper, do the following to update, delete or add a crew position.

1. On the left side menu, mouse over *Crew Manager* and click on *Edit Position Titles*.

2. To modify a position title, edit the text in the white text boxes to however you want the position title to be displayed. This can be done for multiple positions at once.
3. To delete a position, check the delete box next to the position name. This can be done for multiple positions at once.
4. To add a position, type the new position title in the text box at the bottom of the list. Only a single position may be added at a time.
5. When all the position title modifications are as you desire, click the blue button at the bottom labeled *Submit Position Updates*.

Crew Manager Admin Setup - Manage Email Lists & Other Groups

Crew Manager provides the ability to assign people in three groups.

All Posts - new posts published and related post comments submitted are emailed to this group.



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Core Crew - receives special email messages sent by the Skipper. This is a handy to easily contact a select crew group.

Retired - group is removed from the crew roster display, and the crew dropdowns when assigning positions. The users still have accounts and may log in.

Update email distribution as crew members are added, or crew members are no longer active. For Crew who join for only one or two events add as users without checking All Posts so they will receive event reminders and results for events crewed but don't need to receive posts that are published. Check Retired to remove them from the dropdowns when no longer needed. Crew that are scheduled for an event will always receive email notifications for the event, no matter what group assigned to.

Assuming the you are already logged in as the Skipper, do the following to update the email list:

1. On the left side menu, mouse over *Crew Manager* and click on *Manage Groups*.

Manage Email Lists & Other Groups

Update Email Groups for Sending Posts to selected Crew Members & Display on Crew Dropdowns

Check the boxes by each name to include selected crew members in the labeled groups, then click *Update Groups* to save the changes.

Retired group is removed from the crew roster display, and the crew dropdowns when assigning positions. The users still have accounts and may log in.
Core Crew group receives special email messages sent by the Skipper
All Posts group receive new posts published and related post comments submitted

Update email distribution as crew members are added, or crew members are no longer active. For Crew who join for only one or two events add as users without checking *All Posts* dropdowns when no longer needed.

Retired:	<input type="checkbox"/>	Core Crew:	<input type="checkbox"/>	All Posts:	<input type="checkbox"/>	Bill Kneller (Admin) -- admin --> admin@crew-mgr.com
Retired:	<input type="checkbox"/>	Core Crew:	<input checked="" type="checkbox"/>	All Posts:	<input checked="" type="checkbox"/>	Charlie Enright -- Charlie --> charlie@crew-mgr.com
Retired:	<input type="checkbox"/>	Core Crew:	<input type="checkbox"/>	All Posts:	<input checked="" type="checkbox"/>	Crew Member -- Crew --> crew@crew-mgr.com
Retired:	<input type="checkbox"/>	Core Crew:	<input checked="" type="checkbox"/>	All Posts:	<input type="checkbox"/>	Dee Caffari -- Dee --> dee@crew-mgr.com
Retired:	<input type="checkbox"/>	Core Crew:	<input checked="" type="checkbox"/>	All Posts:	<input type="checkbox"/>	Dennis Conner -- Dennis --> dennis@crew-mgr.com
Retired:	<input type="checkbox"/>	Core Crew:	<input type="checkbox"/>	All Posts:	<input checked="" type="checkbox"/>	Jimmy Spithill -- Jimmy --> jimmy@crew-mgr.com
Retired:	<input type="checkbox"/>	Core Crew:	<input type="checkbox"/>	All Posts:	<input type="checkbox"/>	William Bligh -- Skipper --> captain@crew-mgr.com

[Update Groups](#)

2. The list of all crew members is displayed in alphabetical order preceded by the three groups with check boxes.
3. Assignments for each group may be made by checking or unchecking the group boxes for each person as desired.
4. When assignments are complete, click the blue *Update Groups* button at the bottom to save the updates.

Load the Season Schedule - All In One Calendar Events

Crew Manager takes advantage of the All in One Event Calendar (AI1EC) plugin by Timely to setup a calendar for the season. The AI1EC plugin provides a full featured calendar with different views available. It also supports graphical icons associated with events that provide a professional look. AI1EC has integrated in the Calendar the ability to add custom fields, which Crew Manager takes advantage of for Uniform (e.g. what color shirts to wear), Registered (Yes -



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the boat has registered for the event) and Fees Paid (Yes or a date when the fees are due). After the event, the entry may be updated with the finish (1 of 7 or 1st) and a link to the finish results. It also allows entry of a series finish (2 of 7) and a link for the series results. The AI1EC plugin allows a one-time import of another calendar for free to load events. If you desire to import other calendars or feeds, there is information on the AI1EC menu when logged in as an administrator by mousing over *Events* on the left menu, then clicking on *Import Feeds*.

The minimum information required for AI1EC entry includes:

- Event Title - the name of the event
- Date - the day the event is scheduled
- Location - Where the boat will be located for the event

Additional information that is recommended for the AI1EC entry includes

- Start time - The time the Skipper wants people at the boat
- Category - A checkbox that allows filter views (e.g. PHRF, Delivery, Cruising, One Design)
- Uniform - A text field to let the crew know what to wear (e.g. white shirts)
- A description with supplementary information - This is a free form text field where information about the race may be entered. Consider adding tides and currents, post event party plans, links to the NOR and SI, or whatever the crew would find helpful preparing for the event
- Featured Image - this allows upload of an image to be displayed with the event. The organizers burgee or the race logo provides a nice touch when users mouse over the event.
- The end time and ability to repeat and event is included in the date & time section

In summary - AI1EC calendar entry reminders scheduled by Crew Manager are sent automatically and will include all this information sent to crew members. Take the time to provide as much information possible so the Skipper doesn't get last minute phone calls!

Assuming the you are already logged in as the Skipper, do the following to create a new calendar event. In the example below, sample text is used to illustrate an entry.



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1. On the left side menu, mouse over *Events* and click on *Add New*. The Add New Event page opens.

The screenshot shows the 'Add New Event' page with the following callouts:

- Add New Event**: Enter title here
- Block where Title is entered**: Points to the title input field.
- Published status block showing Draft, Scheduled or Publish. Includes Preview, Save Draft & Publish Buttons**: Points to the status and action buttons on the right.
- Categories area where a category may be designated**: Points to the categories list on the right.
- Event Details area where Date, Time and Repeating info is entered**: Points to the 'EVENT DATE AND TIME' section.
- Featured Image area where an image may be added to the event**: Points to the 'Featured Image' section at the bottom right.

2. *Enter Title Here*: JYC Spring Race #1
3. *Event Date and Time*: Click date chooser and select May 8, 2018 and the time 5:15pm (time to be at the boat)
4. *Event Date and Time*: Check *No end time* or use the date chooser to select a day and time.
5. *Event Location Details*: *Navy Marina* in Venue Name. For away locations, consider entering the complete address

The screenshot shows the 'Add New Event' page with a callout for the 'Event Location Details' section:

- Event Location Details – Enter the place to be in the Venue Name. Add an address if it might help the crew.**: Points to the 'Venue name' and 'Address' input fields.



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6. *Event Cost & Tickets*: leave blank or fill in the external link if you want crew to purchase tickets for an event. It is a good place to put the Yachtscoring link for an event.

The screenshot shows the 'Add New Event' form in the Skipper Crew Manager. The left sidebar contains navigation links: Dashboard, Posts, Events (selected), All Events, Add New, Media, Comments, Email Posts, Crew Manager, Users, Tools, Settings, and Performance. The main content area is titled 'Add New Event' and has a text input field for the title. Below this is the 'Event Details' section, which includes four expandable sections: 'EVENT DATE AND TIME', 'EVENT LOCATION DETAILS', 'EVENT COST AND TICKETS' (highlighted with a blue callout), and 'ORGANIZER CONTACT INFO'. The 'EVENT COST AND TICKETS' section has three radio buttons: 'No Tickets' (selected), 'Time.ly Tickets', and 'External Tickets'. Below these is a checkbox for 'Free Event' and a 'Cost' input field. The 'ORGANIZER CONTACT INFO' section is partially visible below.

7. *Organizer Contact Info*: leave blank or fill in info if it would help the crew

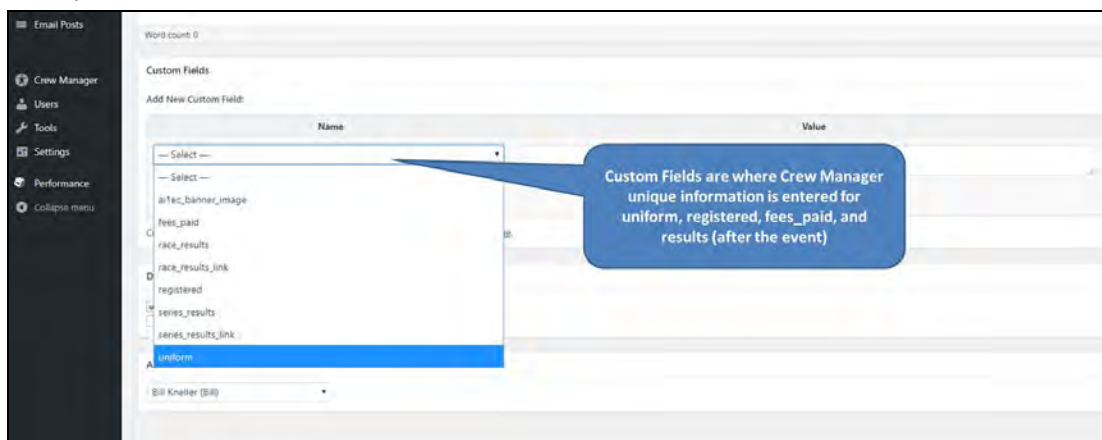
The screenshot shows the 'Add New Event' form in the Skipper Crew Manager. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Add New Event' and has a text input field for the title. Below this is the 'Event Details' section, which includes four expandable sections: 'EVENT DATE AND TIME', 'EVENT LOCATION DETAILS', 'EVENT COST AND TICKETS', and 'ORGANIZER CONTACT INFO' (highlighted with a blue callout). The 'ORGANIZER CONTACT INFO' section has four input fields: 'Contact name:', 'Phone:', 'E-mail:', and 'Website URL:'.

8. *Text Area for Details*: Type free form text with any information that might help the crew. Tides and currents expected, link to race documents, etc. Note the tabs at the top right or the box labeled *visual* and *text*. Text is basic and allows use of raw html. Visual provides an editing toolbar. **Note:** Crew Manager automatically adds the text [crew] at the end of this field when it is saved. This is a shortcode that tells WordPress to display the custom Crew Manager information (crew list, positions, assignments, shirts, etc.) to those viewing the event. If you inadvertently remove [crew] when editing, the Crew Manager information will not be displayed. Should this happen, just open the event to edit and type [crew] at the end of the field and click Publish to save it.
9. *Categories*: Check which category this event is (PHRF, One Design, Delivery, etc.)
10. *Featured Image*: Click on *Set Featured Image* to open the media library. If the image is not in the library, it may be uploaded.



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11. *Custom Fields*: Click the arrow on the *Select* dropdown, then click *uniform*. In the *Value* field type *White Shirts*, then click the *Add Custom Field* button.



12. Scroll up and click the *Save Draft* button. Click the *Preview* button and check your work in the page that opens. Go to the original page being edited and make any corrections. Click *Publish* when complete. Close the preview window that opened.

Splitting a Repeating Event into Single Events

The All in One Event Calendar has a feature that allows entering a repeating event. This is handy if you have a multi-day regatta or a series such as a weekly spring or weekly summer series. It allows the basics to be entered (title, date & time, place, featured image, special fields and text). A recurring event is created by checking the Repeat box in the Event Date & Time section and the Exceptions box if there is a lay day or skipping a day in a series. Once a repeating event is created, you will want to split into separate events if any of the following apply.


- The Crew is different on any of the days
- The start time (time to be at the boat) or location is different on any of the days
- The text included is different for any day (e.g. you may include text about post race activities that are different each day)
- You want to specify a different Uniform for each day (e.g. white shirts one day, blue shirts the next)

Splitting a repeating event into separate events is described in this Time.ly AI1EC support article [How to Edit One Instance of a Recurring Event](#). Here are some pointers on how to easily do this in Crew Manager.

1. The Skipper should be logged in
2. Click *Calendar* on the menu
3. Click the dropdown in the upper right of the event list labeled *Agenda* and select *Month*
4. Use the date chooser at the top of the calendar and navigate to the desired month the event starts
5. You will now open and edit each of the repeating events starting with the first one. It is easier to right click on each event to open that event in a new window. Otherwise you'll need to repeat steps 2 - 4 after editing an event.



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6. For each event instance opened to the right of the Date/Time is a Repeats and an Edit this occurrence icon . Click on the *Edit this occurrence* icon.
7. Make any changes desired to this occurrence, then click the blue *Update* button. If the only change is the Crew for that day, just click the blue *Update* button and the event will be split from the repeating series allowing different Crew for that day.
8. Close that editing window once it has saved and repeat steps 6 and 7 until you have edited all the desired events.

Some Handy Tips for Events:

- When entering a series (e.g. JYC Spring Series) make the first entry with the label JYC Spring #1. In the date chooser, once the start date and time are entered, check the *Repeat* box and setup “repeats every week”, then set the number of occurrences or the end date. Save as draft, then you may edit each week and fill in the race number (JYC Spring #2, JYC Spring #3, etc.).
- Copying a previous event that is similar using *Clone to Draft* makes it easy to create a new entry without having to type the details. The date may be modified, and the title change. If results are recorded on the event being copied, turn off crew email notifications while copying events. Strip out the results in the new events, then enable crew emails again.
- When logged in as the Skipper, you may edit events from the front of the website. Click *Calendar* on the menu, then Click on the + symbol to expand a particular event and see the details. As you mouse over each event the *Edit* link will be displayed that you may click on to edit that event.

Skipper sets “Availability”, “Position” & “Assignments” for events

Once the Crew is loaded into WordPress as *Subscribers* and the boat schedule is entered as AI1EC events, the availability of each Crew member is set for each event. Ideally each crew member does this by logging in and setting their availability using the procedure outlined in the *Crew Member Team Website Directions* manual.

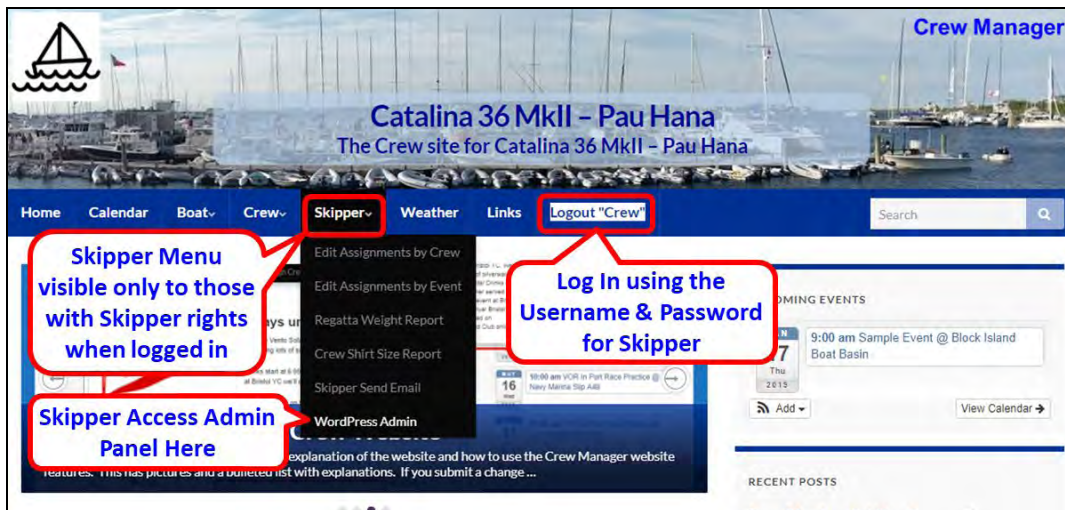
The Skipper may set availability for any crew member as follows:

Assuming the you are already logged in as the Skipper, do the following to set availability, positions and assignments for any Crew.

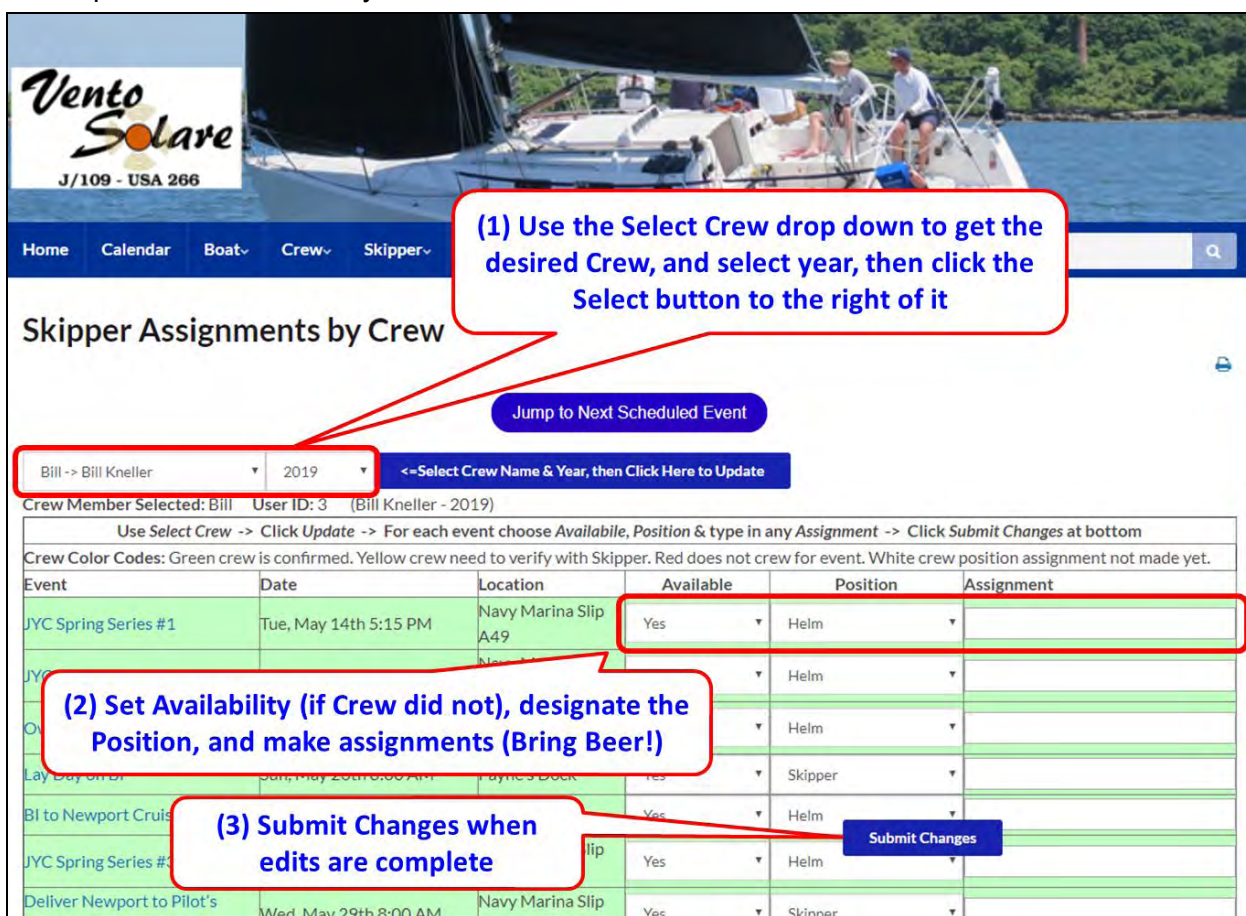


Skipper Directions for Crew Manager

1. On the top menu, mouse over *Skipper* then click on *Edit Assignments by Crew*.



2. On the page that opens, click the *Select Crew* drop down arrow to open the drop down and select a crew member by clicking on the name. If the desired year is not show, click the drop down to select the year.



3. Click the blue *Select Crew Name & Year ...to Update* button. The screen will update and load information for the selected Crew member.
4. The entire season is displayed by event
5. You may change the Crew members availability to Yes, No or Maybe for any event



Skipper Directions for Crew Manager

6. You may designate a Crew position using the position drop down for any event.
7. You may assign the Crew member a task in the text box such as "Bring Beer"
8. Click the floating blue button labeled *Submit Changes* to save the changes
9. The screen refreshes with any changes made - no notifications are sent, unlike when a crew member updates availability

Alternate Method for Skipper Setting Availability, Positions & Assignments

The previous section described a process where the Skipper set Availability, Position and made Assignments using a view for each individual crew member. There may be times when the Skipper wants to see all Crew listed for a regatta and make changes. This is enabled via the second option under the *Skipper* menu labeled *Edit Assignments by Event*.

The Skipper may set availability for any crew member on an event view as follows:

Assuming the you are already logged in as the Skipper, do the following to set availability, positions and assignments for any Crew.

1. On the top menu, click the down arrow next to *Skipper* then click on *Edit Assignments by Event*.
2. If the desired year is not shown, click the drop down to select the year, click the dropdown to select desired event categories, then click the blue *Select Year, then Click Here to Update* button next to the year. The entire season is displayed by event.

Edit Assignments by Event

Jump to Next Scheduled Event

2019 <-Select Year, then Click Here to Update

For each crew in an event choose Available, Position & type in any Assignment -> Click Submit Changes at bottom

Crew Color Codes: Green crew is confirmed. Yellow crew need to verify with Skipper. Red does not crew for event. White crew position assignment not made yet.

Event	Date	Location	Uniform	Registered	Fees Paid	Results
Sample Event	Sat, Apr 13th 10:00 AM	Block Island Boat Basin	Wear White Shirts	Yes	Yes	1 of 7
Name	Available	Position	Assignment			
Charlie Enright	Yes	Tactician	Bring Beer			
Crew Member	Yes					
Dee Caffari	Yes	Main Trim				
Jimmy Spithill	Yes	Foredeck				
Sam Davies	Yes	Headsail Trimmer				
William Bligh	Yes	Stay Ashore	Fix your attitude Captain Bligh!			
		Rail Meat				
		Not Assigned				
Total Crew 6 = Confirmed (5) + Maybe (1)						

Submit Changes

(1) Modify Availability, designate the Position, and make assignments (Bring Beer!)

(2) Submit Changes when edits are complete

3. You may change the Crew members availability to Yes, No or Maybe for any event
4. You may designate a Crew position using the position drop down for any event.
5. You may assign the Crew member a task in the text box such as "Bring Beer"
6. Click the floating blue button labeled *Submit Changes* to save the changes



Skipper Directions for Crew Manager

7. The screen refreshes with any changes made - no notifications are sent, unlike when a crew member updates availability

Recording Race Results

Race results are easily entered on existing AI1EC calendar entries. The easiest method is to open the calendar, find the event, and edit the event. The event could also be edited from the admin panel in WordPress by finding the event on the event list, then editing it there.

Assuming the you are already logged in as the Skipper, do the following to edit an existing calendar event. In the example below, sample text is used to illustrate an entry.

1. On the top menu, click on *Calendar*.
2. Navigate forward or reverse using the left and right arrows as needed to have the event show on the page

Calendar

Expand All allows viewing detail on events in list

Categories ▾

< APRIL 2018 >

Collapse All Expand All Agenda ▾

APR 7
Sat
2018

Twenty Hundred Club Shore Party @ Bristol YC
Apr 7 @ 6:00 pm – 9:00 pm

Join the Vento Solare crew at the awards dinner at Bristol YC. We will be getting lots of silverware for the 2017 race results!

Drinks start at 6:00pm with dinner served at 7:00pm. After the event at Bristol YC we'll do the annual Bristol pub crawl.

Tickets offered on the Twenty Hundred Club online shop.
Registered: Yes **Fees Paid:** Yes **Uniform:** Party attire!

Be at Bristol YC - Sat April 7th @ 6:00PM
Race Results: 1st AAJ Challenge Non-Spin, 2nd Cullyhunk, 1st BI

Spring Dinner

Crew Color Codes: Green crew is confirmed. Yellow crew need to verify with Skipper. Red does not crew for event. White crew position assignment not made yet.

Name	Position	Assignment	Available
Bill	● Skipper	Bring Cindy!	Yes
Brenda	● Guest		

UPCOMING EVENTS

APR 29
Sun
2018
1:30 pm Crew Practice @ Navy Marina Slip A49

MAY 1
Tue
2018
5:15 pm Crew Practice @ Navy Marina Slip A49

MAY 5
Sat
2018
3:00 pm Crew Practice / Pleasure Sail @ Navy Marina Slip A49

MAY 8
Tue
2018
5:15 pm JYC Spring Series #1 @ Navy Marina Slip A49

MAY 15
Tue
2018
5:15 pm JYC Spring Series #2 @ Navy Marina Slip A49

Add ▾ View Calendar →



Skipper Directions for Crew Manager

3. Mouse over the event and click on the *Edit* link that appears.

Edit appears on mouse over

North Sails Spinnaker Trial @ Borden Light Marina [Edit](#)

Apr 17 @ 2:45 pm – 4:45 pm

North Sails

This is a good weather only event that has been moved from Monday to Tuesday due to weather. It will be rescheduled if the weather does not support a good photo shoot and flying the spinnaker!

We will make a decision the evening before on weather and notify everyone on the plan to go or not.

North Sails will be looking at a new spinnaker design and the North Sails crew will be onboard to take pictures. Meet at the Borden Light Marina slip @ 2:45pm to rig the boat and plan on going out at 3pm.

Crew includes:
Chuck Allen
Jack Orr
Brooke Mastrorio
Tim Kohl
plus below

Be at Borden Light Marina - Tue April 17th @ 2:45PM

Crew Color Codes: Green crew is confirmed. Yellow crew need to verify with Skipper. Red does not crew for event. White crew position assignment not made yet.

Name	Position	Assignment	Available
Bill	Helm		Yes

4. The *Edit Event* screen opens. Scroll down to display the section labeled *Custom Fields*

Dashboard
Posts
Events
All Events
Add New
Media
Comments
Crew Manager
Users
Tools
Settings
WP Fastest Cache
Collapse menu

We will be on a mooring - bring a bathing suit. Stern shower will be available.
[crew]

Word count: 96
Last edited by Bill on July

Custom Fields

ai1ec_banner_image
Delete Update

fees_paid
Delete Update

race_results
Delete Update

--- Select ---

ai1ec_banner_image
fees_paid
hpt_headertitle
race_results
race_results_link
registered
series_results
series_results_link
uniform
--- Select ---

Enter new
Add Custom Field

Custom Fields for results and the results link may be accessed by clicking the Custom Field dropdown.

The results data and link are typed in the text box next to the custom field name

Click Add Custom Field when ready to save the results



Skipper Directions for Crew Manager

5. *Custom Fields*: Click the arrow on the *Select* dropdown, then click *race_results*. In the *Value* field type results (e.g. 1st, 3 of 8, etc.), then click the *Add Custom Field* button. If there is a link to the results on the web, repeat the procedure and select the custom field *race_results_link*. The full link is typed (or pasted) into the *Value* field.
6. If there are series results, the same procedure is used using the custom field names *series_results* and *series_results_link*.
7. Scroll up and click the *Publish* button. If Crew Emails are enabled, an immediate email is sent to crew members listed as Crew for that event.

The race results are displayed in multiple areas including:

- On the main menu *Race Results by Year* under *Boat*
- In the respective calendar entry when it is opened
- On the main menu *Assignments* under *Crew*, results are shown in the header for each event
- On the main menu *Skipper Assign Crew by Event* under *Skipper*, results are shown in the header for each event
- In Crew emails that are sent if the Crew Email option is enabled

Regatta Weight Reports

Crew Manager can store the weights and World Sailing IDs for each crew member. These may be used to generate a One Design report that sums crew weights and displays the Sailor Classification for each crew member. The report may be run for any event. Only the Skipper may see weights for crew assigned to an event. If One Design limits are entered, the amount under/over the limit is shown. Standby crew are shown in a separate list on the same page. It also displays the World Sailing Category declared by each crew member. A button is available to automatically validate the World Sailing Classification for each Crew member using the World Sailing database. Links are provided to the US Sailing and World Sailing profiles for each crew member.

Assuming the you are already logged in as the Skipper, do the following to view a report.

1. On the top menu, click the down arrow next to *Skipper* then click on *Regatta Weight Report*.
2. Click the dropdown *Select Regatta for Report* to chose the event.
3. Click the blue *Select Regatta and Click Here to Update* button
4. A report is displayed with the results similar to below. The declared sailor classification stored in a crew members profile is displayed. When a crew member stores their World Sailing Sailor ID, the classification may be validated by checking the box and clicking the blue *Select Regatta and Click Here to Update* button. It may take a couple of minutes for the World Sailing database to return the results.



Skipper Directions for Crew Manager

Regatta Weight Report

Sample Event (Sat, Apr 13th 2:00 PM) <--Select Regatta & Click Here to Update

☐ <= Check Box to Validate Sailor Classification, then resubmit above - May take a minute to update display while validating data in World Sailing database.

Check Box

Sample Event **Changes to Validated Sailor Classification**

Only confirmed crew who are available and assigned a position are included in the weight report.

Name	Weight (lbs)	Position	Sailor ID	Declared Sailor Classification	US Sailing #
1 Charlie Enright	185	Tactician	USACE14	Group 3 (Professional)	335555T
2 Crew Member	150	Helm		Group 1 (Amateur)	
3 Dee Caffari	130	Main Trimmer	GBRDC17	Group 3 (Professional)	
4 Jimmy Spithill	190	Foredeck	AUSJS5	Group 3 (Professional)	
5 Sam Davies	135	Headsail Trimmer	GBRSD34	Group 3 (Professional)	
Total:	790	= 40 lbs over 750 lb limit.			

Standby crew **Other Crew Listed for Event** **Links to World Sailing Profile** **Links to US Sailing Profile**

Crew Availability Codes: ☒ Crew is Available ? Crew Maybe Available ☒ Crew is Not Available

<input checked="" type="checkbox"/> William Bligh	210	Stay Ashore		Group 3 (Professional)	
? Dennis Conner	305	Rail Meat	USADC86	Group 3 (Professional)	

Crew Shirt Size Report

Crew Manager can store the shirt and jacket sizes for each crew member. When the Skipper needs to buy swag for the Crew, this report includes a matrix of shirt and jacket sizes for each crew member. The report may be run for the *Core Crew*, *All Posts*, *Active* and *Inactive* (Retired) groups.

Assuming the you are already logged in as the Skipper, do the following to view a report.

1. On the top menu, click the down arrow next to *Skipper* then click on *Crew Shirt Size Report*.
2. A report is displayed with the results similar to below. A report may be displayed for various crew groups using the dropdown.

Crew Shirt Size Report

Active Crew List <--Select Crew Group & Click Here to Update

Name	Shirt Size	Jacket Size	
1. Charlie Enright	Mens - Large		
2. Crew Member	Mens - Medium	Mens - Large	
3. Dee Caffari	Womens - Small		
4. Dennis Conner	Mens - XXL		
5. Jimmy Spithill	Mens - Large		
6. Sam Davies	Womens - Medium		
7. William Bligh	Mens - Extra Large		



Skipper Directions for Crew Manager

Crew Position Assignment Report

Crew Manager can produce a consolidated summary of Crew Position Assignments for a calendar year as one page, printable report. This report counts people against positions for a season and displays a color coded matrix. It is helpful for Skippers who try to balance crew position assignments over a season.

- The Skipper logs in and selects from the *Skipper* menu *Crew Position Assignment Report*
- A date dropdown appears at the top and defaults to current year. Select the date and click the blue button next to it to update the display
- A matrix is displayed on the screen with the column headings being each crew member's display name. These are at approximately 45 degree angle so that more information may fit on the display
- Each row displays the position name on the left. Positions with no assignments are not displayed.
- The matrix shows the number of times a crew member was assigned a position during the calendar year, and sums all the assignments at the bottom. Events that were canceled are not included in the totals. The position of Not Assigned is not totaled. Color code shades are displayed with a legend at the top of the matrix. This is a linear comparison of quartiles (25%, 50%, 75%, 100%) to easily see visual indicators for crew members and totals.

A report is displayed with the results similar to below.

2019	<--Select Year, then Click Here to Update				Grouping Color Code: 0 ≤ 25% 25 ≤ 50% 50 ≤ 75% 75 ≤ 100% of greatest value in row.									
	Bill	Cindy	Eric	LarryB	Mikes	Ryan	Allie	Andrew	Billy	Brenda	JV	Luke	Mary	Matt
Co-Skipper	1		1											
Crew	1	5	6	4	2	5	2	2	4	2	7	10	7	
Floater			2			1								
Foredeck					9		10					5		1
Headsail Trimmer						11		18		14		5	1	1
Helm	37													
Main Trimmer			10	20					1					2
Mast					5	5	2		8		1			
Pit							1		2	1		1	17	3
Skipper	18													
Snacktician		6												
Standby Crew					3	4	1		1				1	
Stay Ashore						2	2	5	5	2	7	4	3	
Tactician			15				1							
Totals	57	11	34	24	19	28	19	25	21	19	15	25	29	7



Skipper Directions for Crew Manager

Skipper Send Email

Provides full featured email capability so the Skipper may compose and send messages to Crew associated with any event or the pre-defined groups selected from a drop down menu. No need to look up crew email addresses for entry in your email program, or who is scheduled for a particular event. Skipper Email capability includes the following:

- The Skipper may email the crew associated with an event, or select people who are checked as members of the "Core Crew" group or "All Posts" group. There is no need to update address books on your email program
- The Skipper may address the entire group at once which allows people to "Reply to All", or to send the message individually to each group member.
- A Subject may be added, if none is entered it will default to "A Message from the [boat name] Skipper"
- The message may be formatted using an MS Word like toolbar. You may also attach images.
- A status message is sent to the Skipper admins upon completion of sending, if enabled in the Crew Manager Admin panel.

Assuming the you are already logged in as the Skipper, do the following to send email.

1. Mouse over Crew Manager on the left menu and click on *Skipper Send Email*



Skipper Directions for Crew Manager

Skipper Send Email

To:

Send Email to Each *Individual* or *Group* (Group allows reply to all): ☐ Individual ☒ Group

Subject:

Message Content:

Add Media

VisualText

ParagraphBBIListListQuoteListListListLinkListImageTable

Type over this text

Bill Kneller
[J/109 Vento Solare](#)

- Select email recipients in the dropdown by **To**:
- Select **Group** or **Individuals** for the way email recipients should be addressed. **Group** allows people to reply to everyone on the message.
- Type message subject in the text box provided by **Subject**:
- Type message in the **Message Content** area provided and format using the toolbar below **Message Content**:
- Click **Send Email** to send the message.

Send Email

2. Under *To*: select the desired message group or event for crew associated with that event.
3. Check *Individual* or *Group* to select if the message will be sent to all at once, or as individuals
4. Under *Subject*: type in the desired subject or leave blank for the default.
5. Under *Message Content*: type your desired message using the formatting buttons as desired.
6. When complete, scroll down and click the blue *Send Email* button.

Customize a Crew Manager Site

Existing Capabilities

The Skipper is able to create, edit and delete both posts and calendar events with the default privileges granted. Comments may also be created, edited and deleted.

Administrative Access to WordPress

In order to customize the website, additional Administrative privileges will be granted to the Skipper or a person designated by the Skipper. There is no charge for this. Additional Administrative privileges are not granted by default because someone who does not know what



Skipper Directions for Crew Manager

they are doing can "break" the boat's website. Additional privileges are required to create and edit pages, modify the menu, update sidebar widgets, change the header, change colors and overall website layout.

A separate login account requiring a different email address from the Skipper email will be needed in order to setup this access. This is to make sure that inadvertent changes are not made to the site when the Skipper is logged in.

Technical Information

The boat website is built with WordPress using the Graphene theme. and an associated child theme. WordPress is installed in a multisite configuration with each site as a subdomain. Plugins available to each site are installed on the main site and enabled over the network. This means that individual boat websites are restricted to use only those plugins installed and enabled over the network (e.g. individual users are unable to install additional plugins). This is to preclude incompatibilities and security risks. The following plugins are installed and enabled over the network for all sites:

- Akismet Anti-Spam
- All-in-One Event Calendar by Time.ly
- Classic Editor
- Crew Manager
- Import users from CSV with meta
- User Role Editor

The installed plugins provide needed website functionality, or permit a convenient method to import data (e.g. Crew members).

The Graphene theme has been tailored and extensive testing done with Crew Manager to optimize the experience across various devices (PC, Mac, iPad, iPhone, Android phone). Other themes are not allowed because specific Crew Manager functionality is built in the modified Graphene Child theme. Thus Crew Manager can not be modified to use another theme.

Restoring the Default Configuration

Should a site be "totally trashed" as a result of modifications, Crew Manager LLC has the ability to restore the default configuration. This is done without the loss of event data, posts or crew data. It will replace any theme modifications made and overwrite pages with the same name. This will be done once at no charge. There will be a charge for subsequent restorations to the default configuration.