



# Crew Manager

Crew Manager

Custom Boat Websites + Full Featured Crew Management Capabilities

## Crew Manager Skippers Manual

Version 2.7  
8 October 2019

<http://crew-mgr.com>

Version	Date	Comment
2.7	10/8/2019	Added event import, custom email groups and customized AI1EC field names. Updated screen shots.
2.6.1	9/11/2019	Updated Smart Copy for canceled events, updated screen shots with tags.
2.6	9/4/2019	Added Results Entry to Regatta Registration Status Report, Add Crew Hide Feature for the "closed visibility" model.
2.5	8/26/2019	Updated Add User, added Crew responses to Regatta Registration Status Report, Added Multiple boat calendar filtering, and User field sorting
2.4	6/19/2019	Added Availability & Position selection for entire column, added short Sizes, added User last logged in display, added Notify Maybe to Update Availability, added custom field display in Crew shortcode, Added automatic email reminder 5 days in advance for Skipper to pay Regatta registration fees
2.3	5/5/2019	Added Smart Copy Events, updated various pictures, fixed typos
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 controls the boat website *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 48 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.
- Optional Crew Hide feature for a "closed visibility" model

## 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, jacket size and short size. The Skipper may also assign Crew to groups including the predefined groups *Show Crew*, *Core Crew*, *All Posts* and *Retired* plus custom group names the Skipper may define. Settings are available for the Skipper to enter One Design weight limits, and if the Helm weight should be 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 view & sum 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 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 to member profiles for US Sailing and World Sailing are provided.
- **Crew Shirt Size Report** - When the Skipper needs to buy swag for the Crew, this report includes a matrix of shirt, jacket and short 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 by calendar year is available. This report allows the use of category & tag filters to count 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.




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- **Skipper Send Email** - Provides full featured email capability so the Skipper may compose and send messages to Crew associated with any event, custom groups set by the Skipper, or pre-defined groups all 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, Crew responses and associated fee payments. Automated reminders are sent 5 days in advance to the Skipper if a due date is entered for the fee\_paid field. The Skipper may also enter registration and fee payment information.
- **Annual Smart Copy** - Smart Copy Events is accessible by the Skipper via the admin screen to allow copying selected events for the next season. Events are advanced a selectable number of days to create a new identical event that may be edited for the next season. This significantly reduces data entry to setup subsequent seasons.
- **Schedule Multiple Boats Owned by the Skipper** - Some own multiple boats and want to coordinate schedule and crews using a single site. Through the use of *Tags* a Skipper may schedule multiple boats on the same site and easily track individual boat schedules

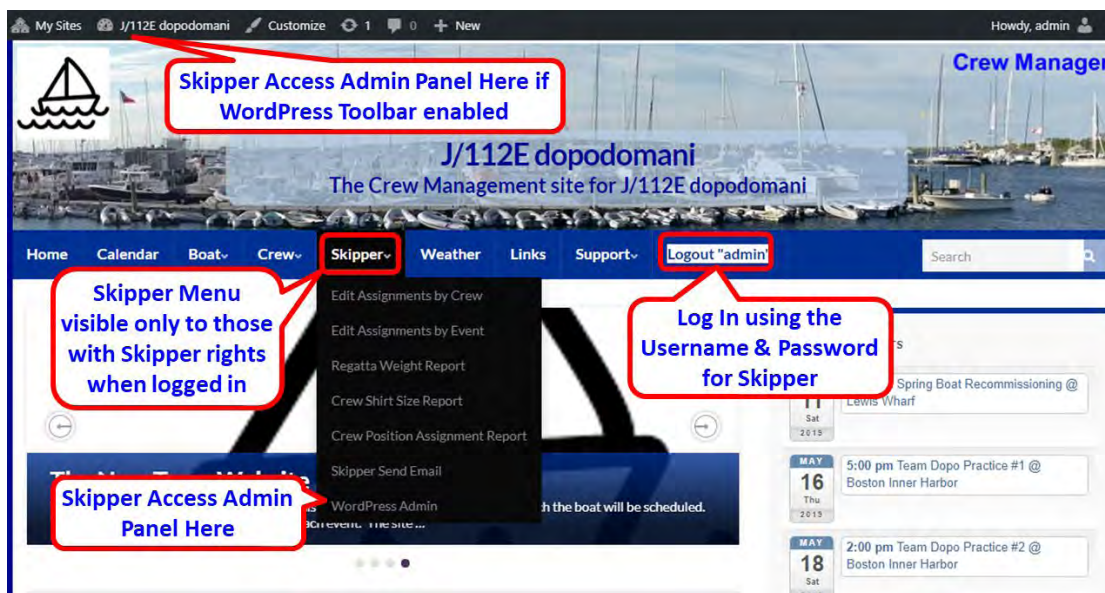
## Skipper Log In to WordPress Admin Panel

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.

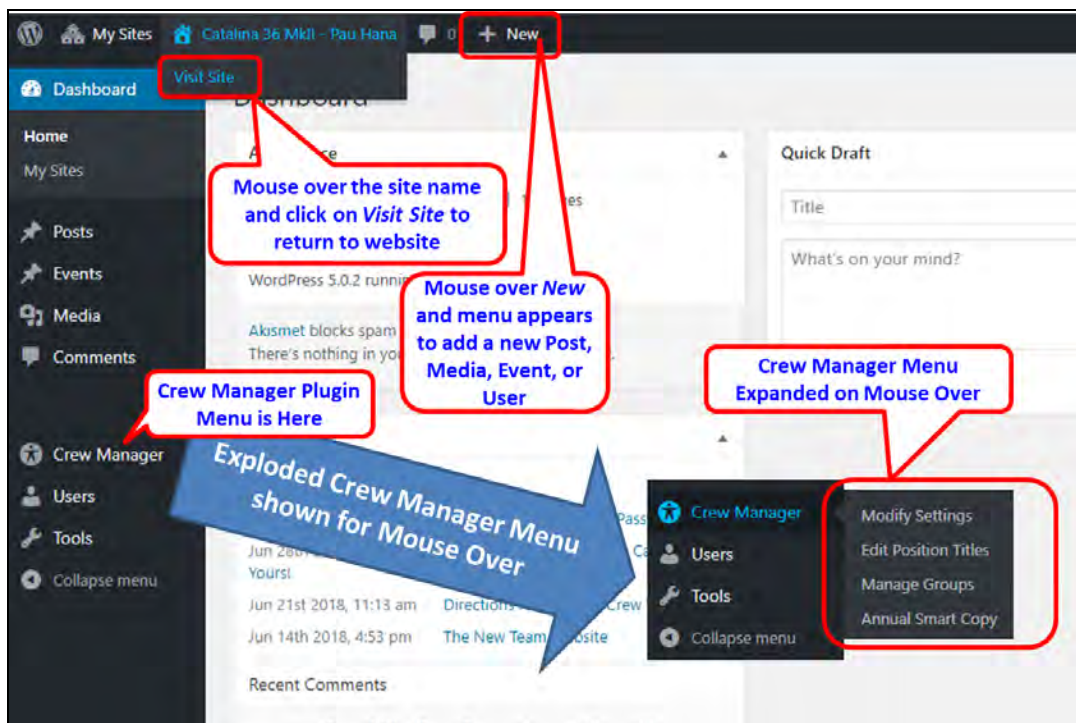
1. Log in to your *Crew Manager* site as the Skipper or Administrator if you have multiple logins. The *Skipper* menu will appear in the menu bar. The *Skipper* menu is not visible to Crew or to people who are not logged in. **Note:** The Skipper may also set the WordPress toolbar to display at the top of the screen. This option is set under the Skipper's profile by checking the box *Show Toolbar when viewing site*.
2. Option 1: Mouse over *Skipper* on the menu and click on *WordPress Admin*  
Option 2: If WordPress toolbars enabled click the dashboard icon  at screen top left



# Skipper Directions for Crew Manager



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 system access 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





# Skipper Directions for Crew Manager

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 help and have upgraded 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 utilizes 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 mobile phone number, mobile phone carrier, check box to receive SMS text messages in addition to email, shirt size, jacket size, short 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 same information for an individual user but are not required to be the same. Typically the display name is 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, spaces are permitted). The Username must be lowercase and is what a Crew member will use as their log in, with their own password. A user may also use their email address as a substitute for their Username. 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

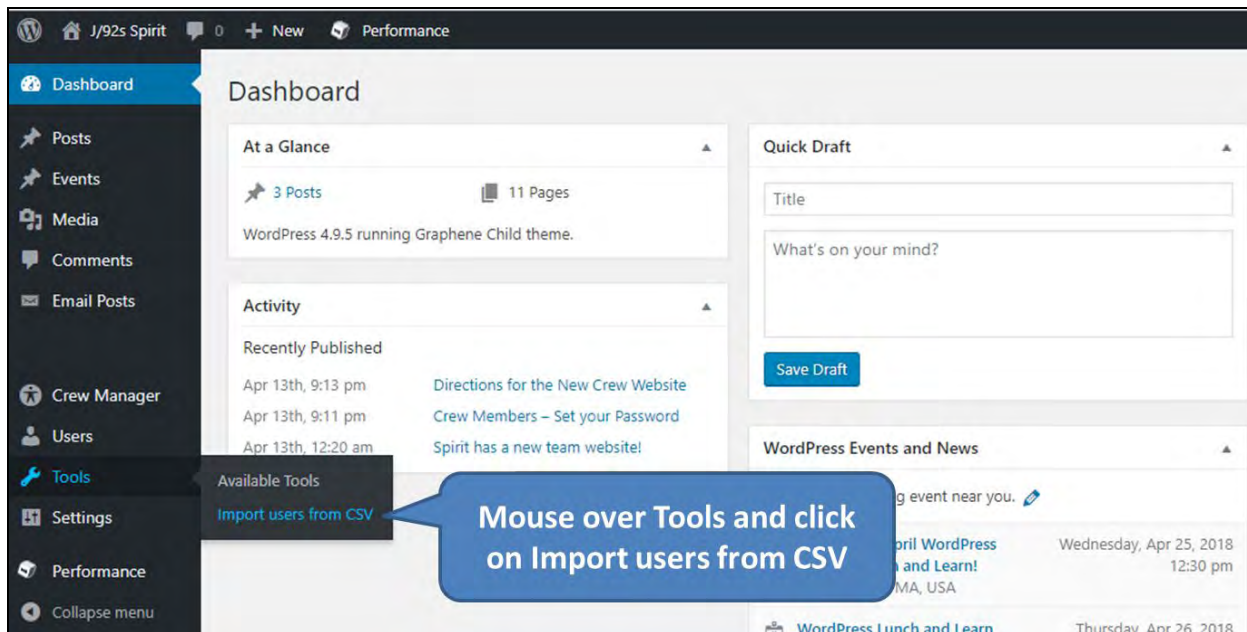
The WordPress Plugin "Import users from CSV with meta" is installed allowing a convenient method to load a list of users all at once. This is typically done when Crew Manager is initially setup for a boat. An Excel spreadsheet template is [available at this link](#) to download and populate with Crew 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 or you may end up being locked out and require the Crew Manager Administrator to set a password for you to log in again..
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*.



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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, 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 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*.

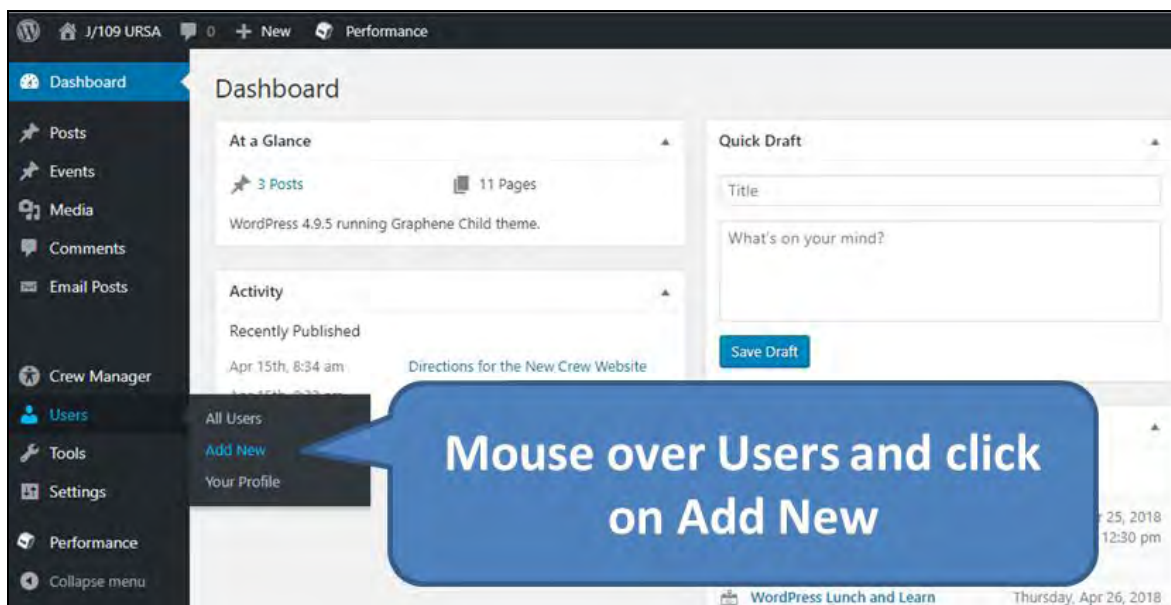
## Creating Users Individually

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*.



# Skipper Directions for Crew Manager

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* (only displayed for Superadmins) until you reach the section labeled *Add New User*. Enter information in the following fields (\* indicates required field):
  - a. \*Username (must be lowercase, no spaces, numbers or special characters)
  - b. \*Email
  - c. \*First Name
  - d. \*Last Name
  - e. \*Display Name
  - f. Send User Notification box - check or uncheck as desired if you want to notify the user about their new account, but it is not necessary
  - g. Role (leave as *Subscriber*)
  - h. Mobile Phone Number (use format 401-555-1212)
  - i. Mobile Phone Carrier (dropdown selection)
  - j. *Receive SMS Text Messages in Addition to Email* checkbox
  - k. Shirt Size (dropdown selection)
  - l. Jacket Size (dropdown selection)
  - m. Short Size (dropdown selection)
  - n. Weight in lbs.
  - o. World Sailing Sailor ID
  - p. World Sailing Sailor Classification (dropdown selection)
  - q. US Sailing Membership Number
  - r. *Include on Core Crew Email List* checkbox - Check if you want this crew to receive email messages for the Core Crew group
  - s. *Include on All Posts Email List* checkbox - 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*.



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6. Repeat these steps as necessary to add additional users

## View & Edit All Users - Display Last Logged In Time for Each User

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 *All Users*
4. The WordPress Users screen will load with all users loaded in a table. The right column displays *Last Logged In* for each user. Most of the columns have links to click in the header row. This sorts the list and toggles the sort ascending/descending for each click and filters out entries with no data. If there is no data in a field, the rows will be hidden from the display when the sort link is clicked.
5. Mousing over each user row displays a link to *Edit*, *Remove* or *View* a selected user

The screenshot shows the WordPress 'Users' screen. A red box highlights the header row with the text 'Click Header Links to Filter / Sort by a column'. Another red box highlights the 'Last Logged In' column header with the text 'Last Logged In'. A third red box highlights a user row (the user 'crew') with the text 'Mouse over a User row displays links for Edit, Remove, View'.

Username	ID	Display Name	Name	Email	Role	Posts	Last Logged In
admin	1	Admin	Admin	admin@crew-mgr.com	Administrator	0	Sat - August 25, 2018 @ 5:08PM
bill	6	Bill	Bill Kneller	bill@crew-mgr.com	Administrator	1	Mon - August 26, 2019 @ 9:45AM
chuck	2	Chuck	Chuck Knight	chuck@crew-mgr.com	Subscriber	0	
crew	3	Crew	Crew Member	crew@crew-mgr.com	Crew Administrator	1	Mon - August 26, 2019 @ 9:50AM
der	4	Der	Der Caffari	der@crew-mgr.com	Subscriber	0	
jeremy	5	Jeremy	Jeremy Spithill	jeremy@crew-mgr.com	Subscriber	0	
samd	8	Samd	Sam Davies	SamD@crew-mgr.com	Subscriber	0	
skipper	7	Skipper	William Bligh	captain@crew-mgr.com	Subscriber	0	

## 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 require saving the first time Crew Manager is used. Some may decide to change options later to better meet the needs of the Crew. Examples of changes the Skipper might make in the future include:

- Notification emails sent to Crew are scheduled for an event 48 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 36 hours).
- The Skipper receives email notifications every time 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 not be desired after using Crew Manager a while. This notification may be disabled or enabled at any time.
- The Skipper moves to another location with the boat in a different time zone. Not very common, but the plugin was designed so Skippers no matter where they are located





# Skipper Directions for Crew Manager

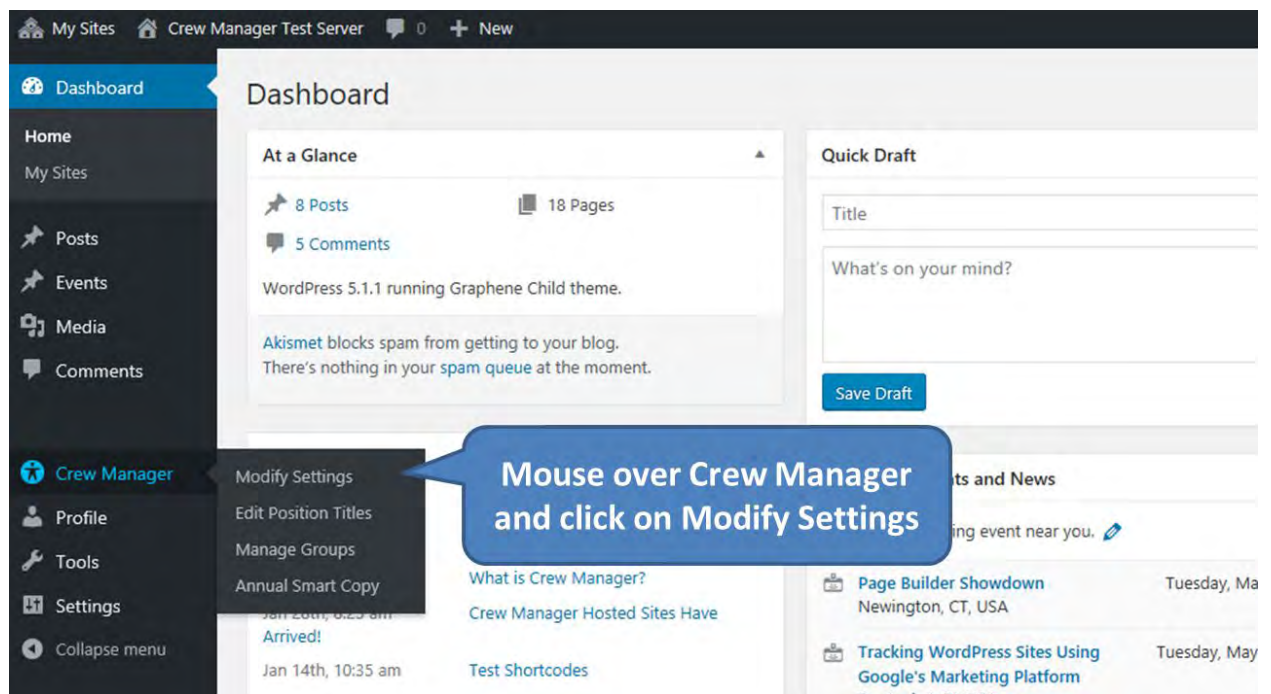
may set their default time zone. If this is changed, the default time zone setting for the AI1EC plugin must also be changed via the WordPress admin menu under *Event, Settings*.

- The Skipper decides 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. Alternately, the Skipper might have 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, enter any changes desired, and save the settings. This is a one time action that is only needed again should any of the setting options require change.

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*
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



# Skipper Directions for Crew Manager

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. The A11EC Events Settings time zone should be set the same as selected here.
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 results are posted, and notices when new posts or comments are posted. The Skipper receives 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 *All Posts* and comments emails. Event reminders will always be sent no matter what Optout setting is used.
7. **Crew Reminder Email Lead Time:** Type in the automatic crew reminder email lead time if not 48 hours. Enter the lead time as a whole number.
8. **Designate the Skipper... The Captain of the Ship!:** Using the drop down select the Skipper. The Skipper gets access to all the Skipper screens and can manage Crew assignments. All emails sent to the Crew appear from the Skipper's email address.
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.  
**Hide Event Crew List Display (Enables "Closed Visibility"):** Using the *Hide* or *Show*



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options, crew may be hidden from display on event lists (Calendar Entries), *Crew Availability* and *Crew Assignments* lists. Crew marked in the *Show Crew* group will always display even if the hide crew option is selected. The default setting is *Show* which is the “open visibility” model. Set to *Hide* for the “closed visibility” model.

**Allow Hidden Crew to Set Availability:** Using the *Allow* or *Prevent* options, crew may be permitted to set their own availability on event lists (Calendar Entries), *Crew Availability* and *Crew Assignments* lists. The default setting is *Prevent* which has no effect unless *Hide Event Crew to Set Availability* is set to *Hide* enabling “closed visibility”. If “closed visibility” is used with this set to *Prevent*, the Skipper must enter availability for all crew members.

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 website customization 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 desired, 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 crew position titles may be edited, deleted or new positions added. A word of caution: Deleting a position title that has been assigned to any crew member 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. *Helm* 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 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* or *Maybe*. This designates a crew member to stay ashore and not sail on the boat for the event. The row is color coded with a red dot / pink background.

Any crew member who 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



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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 the desired 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, but may be repeated as necessary.
5. When all the position title modifications are as desired, 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 to four predefined groups, plus additional named groups the Skipper may define.

- **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** - receives special email messages sent by the Skipper from *Skipper Send Email* on the *Skipper* menu. This is a handy to easily contact a select crew group.
- **All Posts** - new posts published and related post comments submitted are emailed to this group.
- **Show Crew** - only displayed if *Hide Crew on Calendar, Availability & Assignments* is set to *Hide*. Enables the person checked to be displayed on the *Calendar*, *Crew Availability* and *Crew Assignments* lists. The Skipper may want to check *Show Crew* for their own name to be visible for all crew to see.





Update email distribution as crew members are added, or crew members are no longer active. Crew who join for only one or two events may be added as users without checking *All Posts*. This allows them to receive event reminders and results for events crewed but won't 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.

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

- Custom groups are defined in the upper section. The Skipper to add, delete and change Custom Groups, then click the blue *Update Custom Group Names* button to save the changes. Once added, the groups appear in the section at the bottom with a column having check boxes by each crew so they may be selectively added to the group. This picture above shows this annotated with blue lines.
- A crew member list is displayed in alphabetical order preceded by various groups with check boxes. Note the *Show Crew* group (annotated with red lines above) is only displayed when the *Hide Crew* option is selected in *Crew Manager Modify Settings*. This allows selected users to be always visible on the Calendar, Crew Availability and Crew Assignments lists when the *Hide Crew* option is selected in *Crew Manager Modify Settings*.



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4. Assignments to each group may be made by checking or unchecking the group boxes for each person as desired.
5. When assignments are complete, click the blue *Update Groups* button at the bottom to save the updates.

## Copy Past Season Schedule - Annual Smart Copy

After Crew Manager has been used for a season, a new schedule may be easily copied from a previous season. The Skipper may access Annual Smart Copy via the admin screen to allow copying selected events to the next season. Events may be copied from a selected calendar year to future dates with a selectable offset. This will reduce typing and simplify scheduling. Many events occur each year with fixed dates or days of the week. Annual Smart Copy allows copying past events to future dates advanced a specified number of days. The following are copied for each event: Event Title, Start / End Date & Time (advanced as selected), Event Location Details, Event Cost & Tickets, Organizer Contact Info, Event Text Field, Uniform (Custom Field), and Featured Image. Only the first entry of a repeating event is copied. The following are purposely not copied to the new event: certain custom fields (registered, fees paid, results, results link, series results, series results link), Crew availability, positions & assignments. A repeated event is shown on the list with the date spanning two lines. The repeated event is copied using the first date in the series as a single event. Repeated dates & excluded dates must be edited in the copied event. Canceled events that are copied have *Canceled*: removed from the title and *This event is canceled* removed from the description in the new event that is created. Copied events may be edited as desired by clicking the link in the table to update for next season. Crew availability needs to be set and assignments made for the copied entries.

Smart Copy may be run on different event batches to create a new season. An example is a regatta that is scheduled once every two years. The Year to Copy would be a year previous to the current year. The older event(s) may be selected and advanced 728 days (or offset that may be applicable) to create the new event for editing. Once that is complete, the current year would be selected to Smart Copy the desired events to next year.

Assuming you are already logged in as the Skipper, do the following to copy a past season schedule.

1. On the left side menu, mouse over *Crew Manager* and click on *Annual Smart Copy*.



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**Smart Copy Events to Next Year**  
Copy selected events to future year, advancing dates so they occur the same week day

Events may be copied from a selected calendar year to future dates with a selectable offset to reduce typing and simplify scheduling. Many events occur each year with fixed dates or days of the week. This screen allows copying past events to the future with dates advanced the specified number of days. The following are copied for each event: Event Title, Start / End Date & Time (Advanced as selected), Event Location Details, Event Cost & Tickets, Organizer Contact Info, Event Test Field, Uniform (Custom Field), and Featured Image. Only the first entry of a repeating event is copied. Canceled events copied have "Canceled" removed from the title and the canceled message removed from the event description. The repeated dates & excluded dates must be edited in the copied event. Copied events may be edited as desired to update for the next season with crew availability to be set and assignments made.

1. Select Year to Copy and Days to Advance, then click Update Dates to save the changes. You may iterate this to obtain the desired date offset (match week days). Events are not copied until the Smart Copy Events button is clicked in step 4.
2. Check / Uncheck boxes next to each event to choose which events are copied. Checked events will be copied in step 4.
3. Click Update Dates to update the event table Advanced Date column and verify those events to be copied. Iterate steps 2 and 3 as necessary.
4. Click Smart Copy Events at bottom of list only once to create the copied events for next year.

Year to Copy: 2019 Days to Advance: 364 Example: Monday, Apr 15th 2019 advances to Monday, Apr 15th 2020 <== Update Dates

Copy	Event & Location	Original Date	Advanced Date
<input type="checkbox"/>	Sample Event	Tue, Feb 20th 2019	Tue, Feb 25th 2020
<input type="checkbox"/>	Instrument Training & Practice Sail	Tue, Apr 23rd 2019	Tue, Apr 21st 2020
<input type="checkbox"/>	Candlelight Around Aqueduct/Springs Race	Tue, May 7th 2019	Tue, May 5th 2020
<input type="checkbox"/>	Candlelight Lufftunk Race	Sat, Jul 20th 2019	Sat, Jul 18th 2020
<input type="checkbox"/>	Test adding Crew	Thu, Aug 1st 2019	Thu, Jul 30th 2020
<input type="checkbox"/>	Block Island Race	Sat, Aug 3rd 2019	Sat, Aug 1st 2020
<input type="checkbox"/>	Block Island Race Setup	Mon, Aug 5th 2019	Mon, Aug 3rd 2020
<input type="checkbox"/>	Prince Henry Race	Sat, Aug 24th 2019	Sat, Aug 22nd 2020
<input type="checkbox"/>	Test Register for Payment	Sun, Sep 1st 2019	Sun, Aug 30th 2020
<input type="checkbox"/>	Test Block Island Race	Sun, Sep 8th 2019	Sun, Sep 6th 2020
<input type="checkbox"/>	Wild North American Championship	Thu, Sep 19th 2019 - Sun, Sep 22nd 2019	Thu, Sep 17th 2020 - Sun, Sep 20th 2020
<input type="checkbox"/>	Fall Race around Providence	Sat, Sep 21st 2019	Sat, Sep 19th 2020

Example: Monday, Apr 15th 2019 advances to Monday, Apr 15th 2020 <== Update Dates

2. The list of events defaults to the current year for *Year to Copy*, and 364 for *Days to Advance* resulting in future dates occurring the same day of the week, one year later (except for leap years). These may be changed using the *Year to Copy* dropdown and *Days to Advance* box. Clicking the *Update Dates* button refreshes the list.
3. Each Event & Location are displayed in a column as a link. Clicking the link opens the original event in a new page should it be desired to see the event details.
4. The *Copy* column has a checkbox next to each event. The box should be checked to copy the event. There are buttons above the table to check or uncheck all boxes to make individual selections easier. Once the desired event boxes have been checked or unchecked, click the *Update Dates* button at the top or bottom of the list to update the display for review.

The list is updated with those events excluded from copy having a blank in the *Advanced Date* column. A blue *Smart Copy Events* button appears at the bottom. Do not click this button until the events are listed for copy as desired. Steps 3 and 4 may be iterated as necessary to make corrections before executing the Smart Copy.

**Smart Copy Events to Next Year**  
Copy selected events to future year, advancing dates so they occur the same week day

Events may be copied from a selected calendar year to future dates with a selectable offset to reduce typing and simplify scheduling. Many events occur each year with fixed dates or days of the week. This screen allows copying past events to the future with dates advanced the specified number of days. The following are copied for each event: Event Title, Start / End Date & Time (Advanced as selected), Event Location Details, Event Cost & Tickets, Organizer Contact Info, Event Test Field, Uniform (Custom Field), and Featured Image. Only the first entry of a repeating event is copied. Canceled events copied have "Canceled" removed from the title and the canceled message removed from the event description. The repeated dates & excluded dates must be edited in the copied event. Copied events may be edited as desired to update for the next season with crew availability to be set and assignments made.

1. Select Year to Copy and Days to Advance, then click Update Dates to save the changes. You may iterate this to obtain the desired date offset (match week days). Events are not copied until the Smart Copy Events button is clicked in step 4.
2. Check / Uncheck boxes next to each event to choose which events are copied. Checked events will be copied in step 4.
3. Click Update Dates to update the event table Advanced Date column and verify those events to be copied. Iterate steps 2 and 3 as necessary.
4. Click Smart Copy Events which appears at bottom of table after the Update Dates button is clicked. This creates the copied events.
5. Copied events are annotated with Copied in the Copy row. Repeat steps 1 through 4 as desired. Click Clear Previously Copied indicators to remove the Copied annotation.

Year to Copy: 2019 Days to Advance: 364 Example: Monday, Apr 15th 2019 advances to Monday, Apr 15th 2020 <== Update Dates

Check All Uncheck All Invert Selection

Copy	Event & Location	Original Date	Advanced Date
<input checked="" type="checkbox"/>	Sample Event - Block Island Boat Race	Tue, Feb 20th 2019	Tue, Feb 25th 2020
<input checked="" type="checkbox"/>	Instrument Training & Practice Sail - Navy Marina Slip A10	Tue, Apr 23rd 2019	Tue, Apr 21st 2020
<input checked="" type="checkbox"/>	Candlelight Around Aqueduct/Springs Race - G3 Gong Fl Green 4wec SSE of Hog Island Light	Tue, May 7th 2019	Tue, May 5th 2020
<input checked="" type="checkbox"/>	Candlelight Lufftunk Race - G3 Southeast of Rose Island	Sat, Jul 20th 2019	Sat, Jul 18th 2020
<input type="checkbox"/>	Test adding Crew - My Dink	Thu, Aug 1st 2019	
<input type="checkbox"/>	Block Island Race - G3 Southeast of Rose Island	Sat, Aug 3rd 2019	
<input type="checkbox"/>	Block Island Race Setup - R12 Northwest of the New Harbor entrance	Mon, Aug 5th 2019	
<input type="checkbox"/>	Prince Henry Race - Various designated marks in Hatteras/Greets Bay for start	Sat, Aug 24th 2019	
<input type="checkbox"/>	Test Register for Payment - My Place	Sun, Sep 1st 2019	
<input type="checkbox"/>	Test Block Island Race - G3 Southeast of Rose Island	Tue, Sep 17th 2019	
<input type="checkbox"/>	Wild North American Championship - Annapolis YC	Thu, Sep 19th 2019 - Sun, Sep 22nd 2019	

Example: Monday, Apr 15th 2019 advances to Monday, Apr 15th 2020 <== Update Dates

**Smart Copy Events** Do not click Smart Copy Events until the table above is annotated with the desired Advanced Date values for all rows.





# Skipper Directions for Crew Manager

- When the list of events to be copied and advanced is as desired, click the blue *Smart Copy Events* button once. The events will be copied and display a message showing the results, and the *Smart Copy Events* button is removed to prevent an inadvertent copy action. (See picture that follows this step).

Copied events are available to edit by clicking on event links in the table, or via the left side Events menu. Events are copied with all fields except for results, results links, registration, and fee paid status. Crew entries for copied events are reset and may be populated for the new entries. Repeating events must be edited to update the interval & number of repetitions.

Below is the display with the results immediately after the events are copied.

### Smart Copy Events to Next Year

Copy selected events to future year, advancing dates so they occur the same week day

Events may be copied from a selected calendar year to future dates with a selectable offset to reduce typing and simplify scheduling. Many events occur each year with fixed dates or days of the week. This screen allows copying past events to the future with dates advanced the specified number of days. The following are copied for each event: Event Title, Start / End Date & Time (Advanced as selected), Event Location Details, Event Cost & Tickets, Organizer Contact Info, Event Text Field, Uniform (Custom Field), and Featured Image. Only the first entry of a repeating event is copied. Canceled events copied have "Canceled:" removed from the title and the canceled message removed from the event description. The repeated dates & excluded dates must be edited in the copied event. Copied events may be edited as desired to update for the next season with crew availability to be set and assignments made.

- Select Year to Copy and Days to Advance, then click Update Dates to save the changes. You may iterate this to obtain the desired date offset (match week days). Events are not copied until the Smart Copy Events button is clicked in step 4.
- Check / Uncheck boxes next to each event to choose which events are copied. Checked events will be copied in step 4.
- Click Update Dates to update the event table Advanced Date column and verify those events to be copied. Iterate steps 2 and 3 as necessary.
- Click Smart Copy Events which appears at bottom of table after the Update Dates button is clicked. This creates the copied events.
- Copied Events are annotated with Copied in the Copy row. Repeat steps 1 through 4 as desired. Click Clear Previously Copied Indicators to remove the Copied annotation.

Year to Copy: 2019 Days to Advance: 364 Example: Monday, Apr 15th 2019 advances to Monday, Apr 13th 2020 <== Update Dates

Check All Uncheck All Invert Selection

Copy	Event & Location	Original Date	Advanced Date
<input checked="" type="checkbox"/>	Sample Event - Block Island Boat Basin	Tue, Feb 26th 2019	Tue, Feb 25th 2020
<input checked="" type="checkbox"/>	Instrument Training & Practice Sail - Navy Marina Slip A49	Tue, Apr 23rd 2019	Tue, Apr 21st 2020
<input checked="" type="checkbox"/>	Canceled: Around Aquidneck/Spring Race - G3 Gong Fl Green 4sec SSE of Hog Island Light	Tue, May 7th 2019	Tue, May 5th 2020
<input checked="" type="checkbox"/>	Canceled: Cuttyhunk Race - G3 Southeast of Rose Island	Sat, Jul 20th 2019	Sat, Jul 18th 2020
<input type="checkbox"/>	Test adding Crew - My Desk	Thu, Aug 1st 2019	
<input type="checkbox"/>	Block Island Race - G3 Southeast of Rose Island	Sat, Aug 3rd 2019	
<input type="checkbox"/>	Block Island Race Return - R 2 Northwest of the New Harbor entrance	Mon, Aug 5th 2019	
<input type="checkbox"/>	Pence Henry Race - Various designated marks in Narragansett Bay for start	Sat, Aug 24th 2019	
<input type="checkbox"/>	Test Recatta for Payment - My Place	Sun, Sep 1st 2019	
<input type="checkbox"/>	Test Block Island Race - G3 Southeast of Rose Island	Tue, Sep 17th 2019	
<input type="checkbox"/>	USA North American Championship - Annapolis YC	Thu, Sep 19th 2019	
<input type="checkbox"/>		Sun, Sep 22nd 2019	
<input type="checkbox"/>	Aquidneck Cup -	Sun, Oct 20th 2019	
<input type="checkbox"/>	Great Pumpkin Regatta -	Sat, Oct 26th 2019	

Example: Monday, Apr 15th 2019 advances to Monday, Apr 13th 2020 <== Update Dates

4 Events Successfully Copied with Dates Advanced - Screen will refresh in a few seconds

Copied events are available to edit by clicking the link in the table or on Events menu to left. Events are copied with all fields except for results, results links, registration, and fee paid status. Canceled events copied have "Canceled:" removed from the title and the canceled message removed from the event description. The repeated dates & excluded dates must be edited in the copied event. Copied events may be edited as desired to update for the next season with crew availability to be set and assignments made.

The screen will refresh and annotate those events copied removing the copy checkbox and replacing it with a blue *Copied* indicator. The advanced dates are annotated in blue text. The event link for copied events is included in the table. Copied event annotations remain for future copies until the grey *Clear Previously Copied Indicators* button is clicked.

### Smart Copy Events to Next Year

Copy selected events to future year, advancing dates so they occur the same week day

Events may be copied from a selected calendar year to future dates with a selectable offset to reduce typing and simplify scheduling. Many events occur each year with fixed dates or days of the week. This screen allows copying past events to the future with dates advanced the specified number of days. The following are copied for each event: Event Title, Start / End Date & Time (Advanced as selected), Event Location Details, Event Cost & Tickets, Organizer Contact Info, Event Text Field, Uniform (Custom Field), and Featured Image. Only the first entry of a repeating event is copied. Canceled events copied have "Canceled:" removed from the title and the canceled message removed from the event description. The repeated dates & excluded dates must be edited in the copied event. Copied events may be edited as desired to update for the next season with crew availability to be set and assignments made.

- Select Year to Copy and Days to Advance, then click Update Dates to save the changes. You may iterate this to obtain the desired date offset (match week days). Events are not copied until the Smart Copy Events button is clicked in step 4.
- Check / Uncheck boxes next to each event to choose which events are copied. Checked events will be copied in step 4.
- Click Update Dates to update the event table Advanced Date column and verify those events to be copied. Iterate steps 2 and 3 as necessary.
- Click Smart Copy Events which appears at bottom of table after the Update Dates button is clicked. This creates the copied events.
- Copied Events are annotated with Copied in the Copy row. Repeat steps 1 through 4 as desired. Click Clear Previously Copied Indicators to remove the Copied annotation.

Year to Copy: 2019 Days to Advance: 364 Example: Monday, Apr 15th 2019 advances to Monday, Apr 13th 2020 <== Update Dates

Check All Uncheck All Invert Selection Clear Previously Copied Indicators

Copy	Event & Location	Original Date	Advanced Date
Copied	Sample Event - Block Island Boat Basin		Tue, February 25th 2020
Copied	Instrument Training & Practice Sail - Navy Marina Slip A49		Tue, April 21st 2020
Copied	Around Aquidneck/Spring Race - G3 Gong Fl Green 4sec SSE of Hog Island Light		Tue, May 5th 2020
Copied	Cuttyhunk Race - G3 Southeast of Rose Island		Sat, July 18th 2020
<input type="checkbox"/>	Test adding Crew - My Desk	Thu, Aug 1st 2019	
<input type="checkbox"/>	Block Island Race - G3 Southeast of Rose Island	Sat, Aug 3rd 2019	





# Skipper Directions for Crew Manager

## 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 the ability to add custom fields, which Crew Manager takes advantage of for Uniform (e.g. what color shirts to wear), Registered (Yes - the boat has registered for the event) and Fees Paid (Yes, Paid, 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 free one-time import of another calendar 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*. Crew Manager also provides an Excel template allowing a spreadsheet calendar event import.

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 recommended for 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)
- Tags - a filter that allows assignment of boat name or boat type so that multiple boats may be scheduled and displayed individually on the calendar
- 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 an 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!

## Import Events Using an Excel Spreadsheet

Calendar events may be imported from a CSV formatted file. The Excel source template is populated with the desired information and saved using the Excel Save as CSV (Comma delimited)(\*.CSV) option. All of the required event fields and many of the optional event fields



# Skipper Directions for Crew Manager

are available in the template. Once the import is complete, imported events will display on the calendar and may be easily edited.

1. Download, Populate and Save to your hard disk the [Crew Manager Event Import Excel Template](#). There are directions in the template describing data to be entered. Mouse over the yellow fields below for a brief description of each field. After entering your events, save the file in native Excel format. Save the file again using the Excel **Save as CSV (Comma delimited)(\*.CSV)** option to save in the required format for import. Ignore Excel messages about losing format information and multiple tabs when saving the file in CSV format.

**Import to Crew Manager Calendar an Excel File that has Events saved in CSV Format**

Save time and reduce manual entries by importing multiple events at once.

Calendar events may be imported from a CSV formatted file. The Excel source template is populated with the desired information and saved using the Excel **Save as CSV (Comma delimited)(\*.CSV)** option. All of the required event fields and many of the optional event fields are available in the template. Once the import is complete, imported events will display on the calendar and may be easily edited.

1. Download, Populate and Save to your hard disk the [Crew Manager Event Import Excel Template](#). There are directions in the template describing data to be entered. Mouse over the yellow fields below for a brief description of each field. After entering your events, save the file in native Excel format. Save the file again using the Excel **Save as CSV (Comma delimited)(\*.CSV)** option to save in the required format for import. Ignore Excel messages about losing format information and multiple tabs when saving the file in CSV format.
2. Click the **Choose File** button below, then navigate to the desired location where the populated Excel template was saved in CSV format.
3. Click the **Import** button to start the import action. A message will be displayed with the imported data if successful. An error message will be displayed if there was a problem.
4. Edit the imported Events by clicking on the Event Title link in the table. The event will open on a new page for editing. Events are automatically displayed on the Calendar and may also be edited via the *Events* menu on the left. You may want to assign events to categories (e.g. PHRF, ORR, etc.), add an image and update the event descriptions.

[Crew Manager Event Import Excel Template](#) Header Row Field Names - Mouse over fields below for descriptions

title	start_date	start_time	end_date	end_time	boat_location	boat_address	club	website_url	registration_url	description	category	tag
-------	------------	------------	----------	----------	---------------	--------------	------	-------------	------------------	-------------	----------	-----

Choose CSV File:

No file chosen

2. Click the **Choose File** button, then navigate to the desired location where the populated Excel template was saved in CSV format.



# Skipper Directions for Crew Manager

- Click the *Import* button to start the import action. A message will be displayed with the imported data if successful. An error message will be displayed if there was a problem.

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## Import to Crew Manager Calendar an Excel File that has Events saved in CSV Format

Save time and reduce manual entries by importing multiple events at once.

Calendar events may be imported from a CSV formatted file. The Excel source template is populated with the desired information and saved using the Excel *Save as CSV (Comma delimited)(\*.CSV)* option. All of the required event fields and many of the optional event fields are available in the template. Once the import is complete, imported events will display on the calendar and may be easily edited.

- Download, Populate and Save to your hard disk the [Crew Manager Event Import Excel Template](#). There are directions in the template describing data to be entered. Mouse over the yellow fields below for a brief description of each field. After entering your events, save the file in native Excel format. Save the file again using the Excel *Save as CSV (Comma delimited)(\*.CSV)* option to save in the required format for import. Ignore Excel messages about losing format information and multiple tabs when saving the file in CSV format.
- Click the *Choose File* button below, then navigate to the desired location where the populated Excel template was saved in CSV format.
- Click the *Import* button to start the import action. A message will be displayed with the imported data if successful. An error message will be displayed if there was a problem.
- Edit the imported Events by clicking on the Event Title link in the table. The event will open on a new page for editing. Events are automatically displayed on the Calendar and may also be edited via the *Events* menu on the left. You may want to assign events to categories (e.g. PHRF, ORR, etc.), add an image and update the event descriptions.

[Crew Manager Event Import Excel Template](#) Header Row Field Names - Mouse over fields below for descriptions

title	start_date	start_time	end_date	end_time	boat_location	boat_address	club	website_url	registration_url	description	category	tag
-------	------------	------------	----------	----------	---------------	--------------	------	-------------	------------------	-------------	----------	-----

Choose CSV File:

Choose File

No file chosen

Import

File Validation Success.

CSV data transferred to a temporary file - If a table is shown below, event import to the calendar was successful. Count and verify that all rows were transferred from the file.

Event & Boat Location	Boat Location Address	Boat Call	End	Club or Contact	Registration or Payment	Category	Tag
1. <a href="#">Leukemia Cup</a> -	Pier 40, 89 King St, San Francisco, CA 94107	Sun October 20th @ 9:00AM	Sun October 20th @ 8:00PM	Corinthian YC		PHRF	
2. <a href="#">Great Pumpkin Regatta</a> -	351 Brickyard Cove Rd, Richmond, CA 94801	Sat October 26th @ 9:00AM	Sat October 26th @ 5:00PM	<a href="#">Richmond YC</a>		PHRF	

- Edit the imported Events by clicking on the Event Title link in the table. The event will open on a new page for editing. Events are automatically displayed on the Calendar and may also be edited via the *Events* menu on the left. You may want to assign events to categories (e.g. PHRF, ORR, etc.), add an image and update the event descriptions.

## Create New All In One Calendar Events

Assuming 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.



# Skipper Directions for Crew Manager

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

The screenshot shows the 'Add New Event' form with several callouts:

- Block where Title is entered:** Points to the 'Add title' text input field at the top.
- Event Details area where Date, Time and Repeating info is entered:** Points to the 'EVENT DATE AND TIME (START TIME IS BOAT CALL TIME)' section, which includes checkboxes for 'All-day event' and 'No end time', and date/time pickers for 'Start date / time' and 'End date / time'.
- Published status block showing Draft, Scheduled or Publish. Includes Preview, Save Draft & Publish Buttons:** Points to the 'Publish' section on the right, which includes 'Save Draft', 'Preview', 'Status: Draft', 'Visibility: Public', and 'Publish immediately' buttons.
- Categories area where a category may be designated:** Points to the 'Categories' section on the right, which lists categories like 'Boat Work', 'Cruising', 'Delivery', etc.
- Featured Image area where an image may be added to the event:** Points to the 'Featured image' section at the bottom right, which includes a 'Set featured image' button.

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. *Boat Location Details:* *Navy Marina* in Location Name. For away locations, consider entering the complete address

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

- Event Location Details – Enter the place to be in the Location Name. Add an address if it might help the crew.** Points to the 'Location name' and 'Address' input fields in the 'BOAT LOCATION DETAILS (WHERE THE CREW SHOULD MEET)' section.





# Skipper Directions for Crew Manager

6. *Event Payment / Tickets*: leave blank or fill in the external payment link.. It is a good place to put the Yachtscoring link for an event.

1/109 Vento Solare + New

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EVENT DATE AND TIME (START TIME IS BOAT CALL TIME)

BOAT LOCATION DETAILS (WHERE THE CREW SHOULD MEET)

EVENT PAYMENT / TICKETS INFORMATION (ONLY ENTER COST OR CHECK "FREE EVENT" IF IT IS TO BE DISPLAYED)

☐ No Tickets ☐ Time.ly Tickets (Not used) ☒ Payment Link or Tickets Link Available (Use to Display a Clickable Link)

☐ Free Event Cost:

Payment or Event Tickets URL:

CLUB OR ORGANIZING AUTHORITY INFO

Add optional information for tickets – Payment Link opens a box to enter a link

7. *Club or Organizing Authority Info*: leave blank or fill in info if it would help the crew

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Add title

Event Details

EVENT DATE AND TIME (START TIME IS BOAT CALL TIME)

BOAT LOCATION DETAILS (WHERE THE CREW SHOULD MEET)

EVENT PAYMENT / TICKETS INFORMATION (ONLY ENTER COST OR CHECK "FREE EVENT" IF IT IS TO BE DISPLAYED)

CLUB OR ORGANIZING AUTHORITY INFO

Club or Organization:

Phone:

E-mail:

Website URL:

Add optional information for Event Organizer and Contact Info if it might help the Crew

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. *Tags*: Assign and select the boat name and / or type if the Skipper has multiple boats.
11. *Featured Image*: Click on *Set Featured Image* to open the media library. If the image is not in the library, it may be uploaded.



# Skipper Directions for Crew Manager

12. *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. The Skipper may add new custom fields that may be displayed on any event. A link may be inserted in the *Value* field. If a link is inserted the field *Name* is displayed as a clickable link that opens in a new page (e.g. *Name* as “Notice of Race” with a link in *Value* displays *Notice of Race* as a link that may be clicked for that event).

Custom Fields

Add New Custom Field:

Name	Value
--- Select ---	
--- Select ---	
artec_banner_image	
fees_paid	
race_results	
race_results_link	
registered	
series_results	
series_results_link	
uniform	

Bill Kneller (Bill)

There are pre-defined fields labeled *registered* and *fees\_paid*. The first is used to indicate when the Skipper has registered for an event by entering “Yes”. The *fees\_paid* field may include a date in m/d/y format along with text. Something such as “Payment due 7/23/2019”. In addition to these fields, the Skipper may put the Event Website URL in the *Organizer & Contact* section for the event. The payment URL such as the Yachtscoring Link may be put in the *Event Cost & Tickets* section by selecting *External Tickets* and entering the link in the field labeled *Tickets URL*. The custom field *Payment Link* may be used interchangeably with the *Tickets URL*. A link posted in either location works the same. When the URLs are entered for the event and payment the *Regatta Registration Status* report will display links to easily access the target locations. An automatic email reminder is sent daily to the Skipper starting 5 days prior to the payment due date listed. When payment is made, the *fees\_paid* field should be updated to include the word “paid” or “Yes” so that reminders will not be sent. Reminders will not be sent after the event.

## Sample Automatic Email to Skipper with Fee Payment Due Reminder:

From: **Bill Kneller** <[admin@crew-mgr.com](mailto:admin@crew-mgr.com)>

Date: Mon, Aug 26, 2019 at 5:00 AM

Subject: J/109 Vento Solare Payment Due for AYC Fall Series

To: Bill Kneller <[bill@crew-mgr.com](mailto:bill@crew-mgr.com)>

Hello Bill Kneller,

The [AYC Fall Series](#) scheduled for Saturday September 21, 2019 requires that registration fees be paid by **Thursday August 29th, 2019**.



# Skipper Directions for Crew Manager

Pay fees at the following link: [Race Fee Payment Link](#)

**After paying fees:** Click this [J/109 Vento Solare link](#) to update the *fees\_paid* field by inserting the word *Paid* in the field value, then click the grey *Update* button under the field name.

13. 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.

## Using Crew Manager to Schedule Multiple Boats

Crew Manager was originally developed to accommodate the schedule and coordination of one boat, but some own multiple boats and want to coordinate the schedule and crews using a single site. Here are some tips on how to accommodate multiple boats an owner may have.

- **Use a Team Name for the Boat Type and Name** - The boat type and name on the subscription are joined to identify the site name and are included on all reminder emails. If you have multiple boats with the same name, leave the *boat type* blank and use the *boat name* for the site (e.g. two boats each named Leading Edge would be called Leading Edge). If you have multiple boats with different names, provide a name for the team and use that in the format of "Team" or "Fastboat" for *boat type* and "Fastboat" or "Racing" for *boat name* . All messages will be sent using the combination of *boat type* and *boat name* (e.g. Fastboat Racing or Team Fastboat).
- **Create Tags to Identify Each Boat** - The All in One Event Calendar plugin has the ability to use *Categories* and *Tags* that allow filtering of events on the calendar. Categories are pre-set to identify the type of events (e.g. One Design, PHRF, IRC, etc.). Tags are not used and available to identify separate boats. For multiple boats with the same name, consider using the boat type for the tag (e.g. *J/35* and *J/109*). Owners having multiple boats with different names may include tags with the boat name and type (e.g. *IC37 Dragon*, *Etchells 291* and *Sunfish 5955*).
- **Setup Tags** - One time setup
  1. Log in to your own *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 *Events* and click on *Organize*.
  4. The All1EC plugin Organize Events screen will open - at the top is *Categories* and *Tags*. Click on *Tags*.
  5. Below **Add New Tag** type the desired tag name In the Name box (e.g. *IC37 Dragon*). The Slug will be generated automatically when saved. The description is not used and may be left blank, or a short description entered as information when the page is opened.
  6. Scroll down and click the blue *Add New Tag* button.
  7. Repeat and add additional tags for each boat as desired



# Skipper Directions for Crew Manager

Tags may now be selected on each event to identify the boat used for an event. If there are multiple events and boats where it might be confusing to discriminate which boat, the boat name and or type may be typed in with the event name as an easy discriminator (e.g. C&C30 - Conanicut ATI Race would be entered in the Event Title box)

- **Selecting a Tag for an Event** - Assumes you are creating an Event per the [Skipper Directions for Crew Manager](#)
  1. On the right side of the Add New Event screen is a section labeled *Tags* - Click on the link below that titled *Choose from the most used tags*
  2. Click on the desired tag from the list that is displayed
  3. When done creating an event click on the blue *Publish* button or *Update* button if editing an event
- **Using Tags to Filter Calendar Events for a Single Boat** - The calendar may be filtered to display only selected tags or all tags (default setting). The steps below allow anyone viewing the site to view filtered Events by tag on the Calendar
  1. Click *Calendar* on the top menu
  2. When the page opens *Categories* and *Tags* are displayed at the top. Mouse over *Tags* and click on the desired tag or tags you want to display. The Calendar will update to show only the selected tags.
  3. To clear the tags and display everything, click the X immediately to the left of *Tags*

## Splitting a Repeating Event into Single Events

The All in One Event Calendar has a feature to enter repeating events. 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 must 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.





# Skipper Directions for Crew Manager

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 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 changed. 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. Using Crew Manager Smartcopy will automatically strip out the information that needs to be manually removed when *Clone to Draft* is used.
- 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.

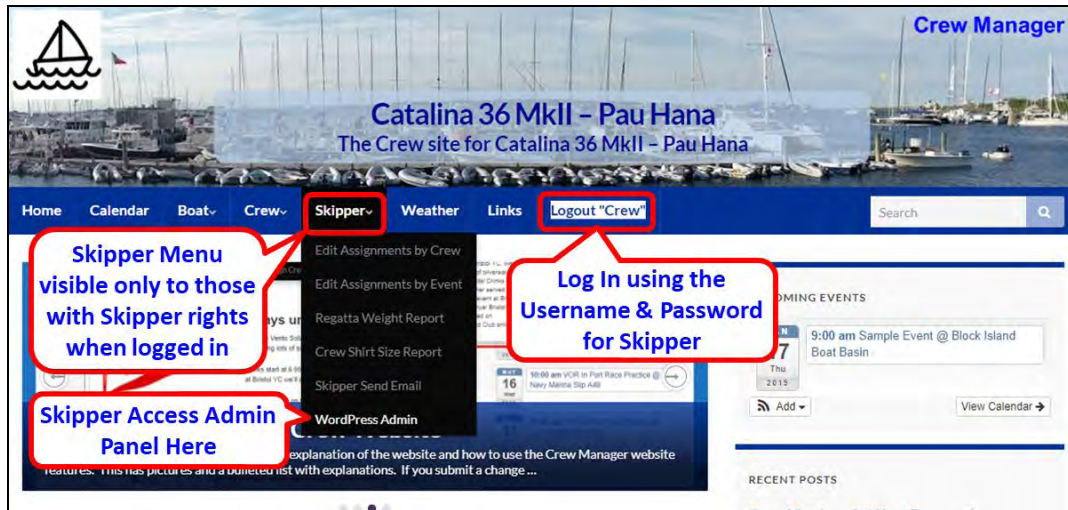
The Skipper may also set availability for any crew member as follows:

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

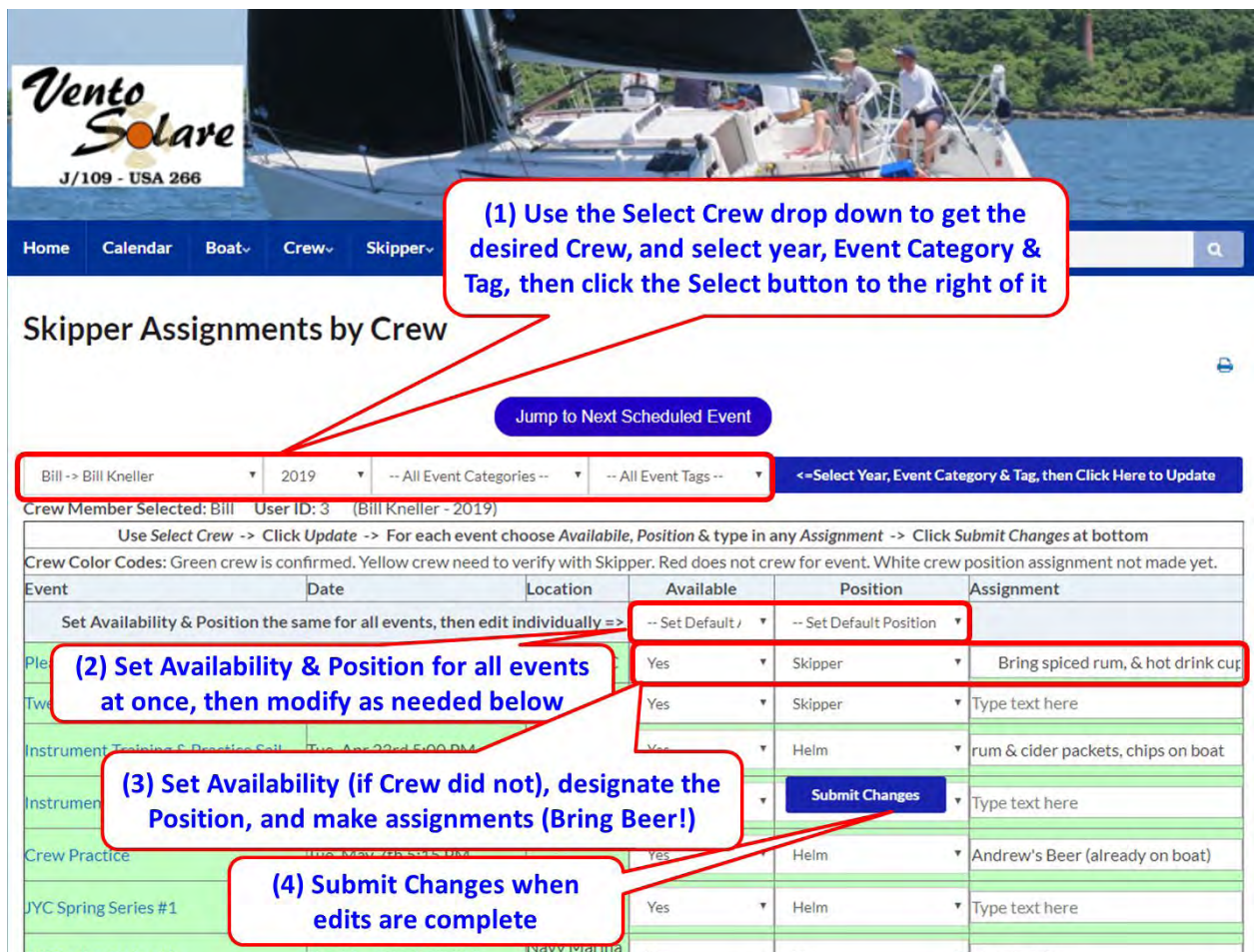


# Skipper Directions for Crew Manager

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 shown, 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.



# Skipper Directions for Crew Manager

4. The entire season is displayed by event with master selectors at the top of the *Availability* and *Position* columns to set all events at once.
5. You may change the Crew members availability to Yes, No or Maybe for any event
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 sets Availability, Position and made Assignments using a view for each individual crew member. **Note:** A Crew member who has not set availability for an event already may be added to the list using the section under the event crew list labeled *Skipper use row below to add a Crew Member, or override data shown above*. 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 item 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 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*



# Skipper Directions for Crew Manager

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 -- All Event Categories -- -- All Event Tags -- [--Select Year, Event Category & Tag, 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	Tue, Feb 26th 11:00 AM	Block Island Boat Basin	Wear White Shirts	registered	Yes	1 of 6

Name	Available	Position	Assignment
Charlie Enright	Yes	Skipper	Bring Beer
Dee Caffari	Yes		
Dennis Conner	Yes		
Sam Davies	Yes	Headsail Trimmer	Type text here
Crew Member	Maybe	Jib Trimmer	Type text here
Admin	Maybe	Not Assigned	Type text here
Jimmy Spithill	No	Main Trimmer	
William Bligh	Yes	Stay Ashore	

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

(2) Add Crew, or modify Crew already listed

(3) Submit Changes when edits are complete

Submit Changes in Bligh

Skipper use row below to add a Crew Member, or override data shown above

Select Crew -- Yes -- Select a Position -- Type text here

Total Crew 6 = Confirmed (4) + Maybe (2)

- You may change the Crew members availability to Yes, No or Maybe for any event (only if Availability was previously set for an event)
- You may designate a Crew position using the position drop down for any event.
- You may assign the Crew member a task in the text box such as "Bring Beer"
- Click the floating blue button labeled *Submit Changes* to save the changes
- The screen refreshes with any changes made - no notifications are sent, unlike when a crew member updates availability

## Remind Crew - Notify Maybe to Update Availability

Crew members may initially set their availability to *Maybe* for some events. As the season progresses the Skipper may want firm commitments so that other people may fill vacant spots and crew positions assigned. The menu item *Notify Maybe to Update Availability* is on the Skipper menu to identify individuals who have set availability to *Maybe*. There are filters to select by category (e.g. PHRF, One Design, All Categories) and for a date range with selectable start and end dates. Once the categories and dates have been filtered as desired, the Skipper checks boxes for events a Crew reminder should be sent. This is sent as an email to the designated Crew, and an optional SMS text message if the Crew opted to receive text messages on their profile. Assuming you are already logged in as the Skipper, do the following to send a reminder for designated Crew to update availability from *Maybe* to *Yes* or *No*.

- On the top menu, click the down arrow next to *Skipper* then click on *Notify Maybe to Update Availability*.





# Skipper Directions for Crew Manager

- The page opens and defaults to show all categories with dates filtered starting today through 30 days later. These may be changed, and the *Select Event Category & Date Range* button is clicked. The screen will refresh with the updated selections.

**Notify Maybe to Update Availability**

Notify via email those crew who set Available as *Maybe* to update their response to *Yes* or *No*.

- Choose the Event Category & Date Range, then click the blue *Select Event Category & Date Range...* button
- Check the *Notify* boxes as required - the *Check All*, *Uncheck All* and *Invert Selection* buttons may be used in addition to individual check box selections
- Click the blue *Send Notification Email* button to send a personalized email with checked events consolidated for each crew member

Event Category	Starting From	Through Date				
-- All Event Categories --	06/20/2019	07/20/2019	<a href="#">Select Event Category &amp; Date Range, then Click Here to Update</a>			
Set Notify Boxes - Check All, Uncheck All, and change Notify check boxes below as required =>			<a href="#">Check All</a>	<a href="#">Uncheck All</a>	<a href="#">Invert Selection</a>	
<b>Cheryl Marrone</b>						
Event	Date	Time	Location	Position	Available	Notify
Cuttyhunk	Sat, Jul 20th	9:00 AM	NAVSTA Marina	Not Assigned	Maybe	<input type="checkbox"/>
<b>Mark Boivin</b>						
Event	Date	Time	Location	Position	Available	Notify
Delivery to NEB: Around Aquidneck Race	Fri, Jun 21st	4:00 PM	New England Boatworks	Not Assigned	Maybe	<input type="checkbox"/>
JYC Tuesday Summer #4	Tue, Jul 16th	4:30 PM	NAVSTA Marina	Standby Crew	Maybe	<input type="checkbox"/>
Cuttyhunk	Sat, Jul 20th	9:00 AM	NAVSTA Marina	Not Assigned	Maybe	<input type="checkbox"/>
<b>MaryBeth Boivin</b>						
Event	Date	Time	Location	Position	Available	Notify
Delivery to NEB: Around Aquidneck Race	Fri, Jun 21st	4:00 PM	New England Boatworks	Not Assigned	Maybe	<input type="checkbox"/>
Around Aquidneck Return Delivery	Sun, Jun 23rd	12:00 PM	Tiverton Yacht Club	Crew	Maybe	<input type="checkbox"/>
<b>Mike Marrone</b>						
Event	Date	Time	Location	Position	Available	Notify
Cuttyhunk	Sat, Jul 20th	9:00 AM	NAVSTA Marina	Not Assigned	Maybe	<input type="checkbox"/>

- There are *Notify* check boxes at the right of each event. These may be selected in bulk using the *Check All* button at the top of the table. Individual boxes may also be clicked.
- Once the desired boxes are checked, the floating *Send Notification Email* button is clicked. This results in reminder emails being sent with events aggregated in a single email per person. A summary email is sent to the Skipper if the *Skipper Notification Email* is enabled on the Crew Manager *Modify Settings* page. A confirmation that emails were sent is also displayed on the page as shown below..

## Notify Maybe to Update Availability

2 People notified to update *Maybe* to *Yes* or *No*.

Notify via email those crew who set Available as *Maybe* to update their response to *Yes* or *No*.

- Choose the Event Category & Date Range, then click the blue *Select Event Category & Date Range...* button
- Check the *Notify* boxes as required - the *Check All*, *Uncheck All* and *Invert Selection* buttons may be used in addition to individual check box selections
- Click the blue *Send Notification Email* button to send a personalized email with checked events consolidated for each crew member

Event Category	Starting From	Through Date				
-- All Event Categories --	03/01/2019	07/19/2019	<a href="#">Select Event Category &amp; Date Range, then Click Here to Update</a>			



# Skipper Directions for Crew Manager

## Recording Race Results

Race results may be entered on existing AI1EC calendar events or via the *Boat, Results* page from the menu. Another method is to open the calendar, find the event, and edit the event. The event may also be edited from the WordPress admin panel by finding the event on the event list, then editing it there.

## Using the Race Results Page to Record Results

Race results may be entered via the *Results & Results Entry* located on the *Boat* menu for Skippers who are logged in.

Home Calendar **Boat** Crew Skipper Weather Links Support Subscribe Logout "admin" Search

Results & Results Entry

Results

Skippers and Admins may enter race results & email results to crew scheduled for selected event(s) using *Submit Changes* button

To delete data in a field, clear the text and type a minus sign (-) in the text box, then click *Submit Changes*

Jump to Next Scheduled Event

Event	Date	Results	Series Results	Results Link	Series Results	Series Results Link	Email Results
Sample Event	02/26/2019	1 of 6	3 of 5	http://twentyh	3 of 5	http://vs.j109.o	
Instrument Training & Practice Sail	04/23/2019	2 of 3		http://www.bv	Enter results	Enter link	

1. Skipper logs in to boat website
2. Mouse over *Boat* and click on *Results & Results Entry*



# Skipper Directions for Crew Manager

Home Calendar Boat Crew Skipper Weather Links Support Subscribe Logout "admin" Search

## Results

Text visible only to Skipper logged in

Skippers and Admins may enter race results & email results to crew scheduled for selected event(s) using **Submit Changes** button

To delete data in a field, clear the text and type a minus sign (-) in the text box, then click **Submit Changes**

Jump to Next Scheduled Event

2019 -- All Event Categories -- -- All Event Tags -- <== Select Year, Event Category & Tag, then click here to update display									
<= All Events are displayed as filtered above - Check Box to display only events with results									
Event	Date	Results	Series Results	Results	Results Link	Series Results	Series Results Link	Email Results	
Sample Event	02/26/2019	1 of 6	3 of 5	1 of 6	http://twentyhu	3 of 5	http://vs.j109.o	<input type="checkbox"/>	
Instrument Training & Practice Sail	04/23/2019	2 of 3		2 of 3	http://www.jyc.	Enter results	Enter link	<input type="checkbox"/>	
Canceled: Around Aquidneck/Spring Race	05/07/2019	1 of 2	2 of 3	1 of 2	http://vs.j109.o	2 of 3	http://www.jyc.	<input type="checkbox"/>	
Canceled: Cuttyhunk Race		2 of 3		2 of 3	my test	3 of 4	Enter link	<input type="checkbox"/>	
Test adding Crew	06/01/2019			Enter results	Enter link	Enter results	Enter link	<input type="checkbox"/>	
Block Island Race	08/03/2019			Enter results	Enter link	Enter results	Enter link	<input type="checkbox"/>	
Block Island Race Return	08/05/2019			Enter results	Enter link	Enter results	Enter link	<input type="checkbox"/>	
Prince Henry Race	08/24/2019			Enter results	Enter link	Enter results	Enter link	<input type="checkbox"/>	
Test Regatta for Payment	09/01/2019			Enter results	Enter link	Enter results	Enter link	<input type="checkbox"/>	
Next Event: Test Block Island Race	09/12/2019			Enter results	http://www.jyc.	Enter results	Enter link	<input type="checkbox"/>	
J/30 North American Championship				Enter results		Enter results	Enter link	<input type="checkbox"/>	
Fall Race around Prudence	09/21/2019			Enter results	Enter link	Enter results	Enter link	<input type="checkbox"/>	

Extra fields that allow data entry visible only to Skipper logged in

Floating Submit Changes button only visible to Skipper logged in

Submit Changes

3. The report detects a Skipper logged in and adds columns to the right for *Results*, *Results Link*, *Series Results*, *Series Results Link*, and *Email Results* with fields in these columns the Skipper may type in the associated results and a check box to email results
  4. A floating Submit button is displayed and when clicked saves the results
  5. If the checkbox in a row is checked to email the results, the results for that event are emailed to the crew, similar to if results were sent by editing and updating the event
- When the screen is refreshed after saving the results, a confirmation message is displayed at the top of the display

## Entering Results by Editing an Event

Assuming 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





**Vento Solare**  
J/109 - USA 266

Home Calendar Boat Crew Skipper Weather Links Photos Log out

**Calendar**

Expand All allows viewing detail on events in list

Categories

APRIL 2018

**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

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

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

**Edit appears on mouse over**

**APR 17**  
Tue  
2018

**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





# Skipper Directions for Crew Manager

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

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. The *race\_results\_link* may be preloaded with a url to the results, but will not display until the *race\_results* field is populated.
6. If there are series results, the same procedure is used using the custom field names *series\_results* and *series\_results\_link*. The *series\_results\_link* may be preloaded with a url to the results, but will not display until the *series\_results* field is populated.
7. Changes for custom fields are automatically saved when the *Add Custom Field* button is clicked. There is no need to click the blue *Update* button unless it is desired to email the results to the Crew. To send the results via email, scroll up and click the blue *Update* button on the right side. If Crew Emails are enabled, an immediate email is sent to crew members listed as Crew for that event.

Race results are displayed in multiple areas including:

- On the main menu *Race Results* under *Boat*
- In the respective calendar entry when the event is opened
- On the main menu *Assignments* under *Crew*, results are shown in each event header
- On the main menu *Edit Assignments by Event* under *Skipper*, results are shown in each event header
- The 5 most recent results displayed on the right sidebar
- In Crew emails that are sent if the Crew Email option is enabled



# Skipper Directions for Crew Manager

## Regatta Weight Reports

Crew Manager can store the weights, US Sailing IDs 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 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. Defaults to Current Year and One Design. If another year or Event Category is desired, update the dropdowns for Year and Event Category and click the blue *Select Year & Category...* button to update the event list.
3. Select the desired event using *Select Regatta for Report* dropdown
4. Click the blue *Select Year & Category ...* button
5. 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 Year & Category ...* button. It may take a couple of minutes for the World Sailing database to return the results.

### Regatta Weight Report

**Choose Year** 2019 **Choose Event Category** One Design **Update & Choose Event** Sample Event (Tue, Feb 26th 2019 @ 1 [Select Year & Category, Click Here, Select Regatta, Click 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** **Changes to Validated Sailor Classification**

**Sample Event**

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	Skipper	USACE14	Group 3 (Professional)	33555T
2 Crew Member	150	Jib Trimmer		Group 1 (Amateur)	
3 Dee Caffari	130	Jib Trimmer	GBRDC17	Group 3 (Professional)	
4 Jimmy Spithill	190	Main Trimmer	AUSJS5	Group 3 (Professional)	
5 Sam Davies	135	Headsail Trimmer	GBRSD34	Group 3 (Professional)	
Total:	790	= 40 lbs over 750 lb limit.			

**Standby crew** **Links to World Sailing Profile** **Links to US Sailing Profile**

**Other Crew Listed for Event**

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

Dennis Conner	305	Rail Meat	USADC86	Group 3 (Professional)	
William Bligh	210	Stay Ashore		Group 3 (Professional)	



# Skipper Directions for Crew Manager

## Crew Shirt Size Report

Crew Manager can store the shirt, jacket and short sizes for each crew member. When the Skipper needs to buy Crew swag, this report displays clothing size matrix for each crew member. The report is available for *Core Crew*, *All Posts*, *Active* and *Inactive* (Retired) groups.

Assuming 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



Name	Shirt Size	Jacket Size	Short Size
1. Charlie Enright	Mens - Large	Mens - Large	Mens - 34" waist
2. Crew Member	Mens - Medium	Mens - Large	Mens - 32" waist
3. Dee Caffari	Womens - Small	Womens - Small	Womens - Size 4
4. Dennis Conner	Mens - XXL	Mens - XXL	Mens - 48" waist
5. Jimmy Spithill	Mens - Large		
6. Sam Davies	Womens - Medium		
7. William Bligh	Mens - Extra Large		

## Crew Position Assignment Report

Crew Manager can produce a consolidated summary of Crew Position Assignments for a calendar year as a one page report. This report counts people by 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, or just to show who did what over the 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, Category and Tag 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 approximately a 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.



# Skipper Directions for Crew Manager

A report is displayed with the results similar to below.

## Crew Position Assignment Report



<div> 2019 -- All Event Categories -- -- All Event Tags -- <a href="#">&lt;== Select Year, Event &amp; Tag Category, then click here to update display</a> </div>										
Grouping Color Code: 0 ≤ 25% 25 ≤ 50% 50 ≤ 75% 75 ≤ 100% of greatest value in row.										
	Bill	Charlie	Dee	Dennis	sand	Skipper	admin	Bill is Testing	Crew	Jimmy
Cook									1	
Crew	1								1	1
Foredeck										1
Guest			1							
Headsail Trimmer					1					
Jib Trimmer			1						1	
Main Trimmer										1
Mast		1					1			
Navigator					1			1		
Pit				1					2	
Rail Meat	1			1			1			1
Skipper	3	1								
Spinnaker Trimmer							1			
Squirrel					1					
Stay Ashore			1	1		1				
Totals for 10 events	5	2	3	3	3	1	3	1	5	4

## 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 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", "All Posts", "Retired", or "Active" Crew groups. Custom groups defined by the Skipper in the *Manage Groups* screen are also available in the Crew Manager Admin panel. If an Event is selected, the Skipper may exclude sending the email to Crew who are designated as "Stay Ashore" for an event
- 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 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:  ☐ <-- Check to exclude Stay Ashore Crew from an event email

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

Subject:

### Message Content:

Add Media

Visual Text

Paragraph **B** *I*

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

- Next to **To:** select the desired message group or event for crew associated with that event. Holding the cursor over an item in the selection list displays the email addresses in a pop-up window (up to 7 lines, then ... is displayed).

ALL POSTS EMAIL GROUP (20 emails)

Retired Crew Group (25 emails)

Active Crew Group - Everyone Not Retired (27 emails)

Crew: Pleasure Cruise Around Newport - Sat, Apr 13th 1:30 PM (9 Yes & 0 Maybe + 0 Stay Ashore = 9 emails)

Crew: Twenty Hundred Club Shore Party - Sat, Apr 13th 6:00 PM (3 Yes & 0 Maybe + 0 Stay Ashore = 3 emails)

Crew: Instrument Training & Practice Sail - Tue, Apr 23rd 5:00 PM (7 Yes & 0 Maybe + 0 Stay Ashore = 7 emails)

Crew: Instrument Calibration - Thu, Apr 25th 10:00 AM (2 Yes & 0 Maybe + 0 Stay Ashore = 2 emails)

Crew: Crew Practice - Tue, May 7th 5:15 PM (8 Yes & 0 Maybe + 0 Stay Ashore = 8 emails)

Crew: JYC Spring Series #1 - Tue, May 14th 5:15 PM (8 Yes & 0 Maybe + 1 Stay Ashore = 9 emails)

Crew: JYC Spring Series #2 - Tue, May 21st 5:15 PM (10 Yes & 0 Maybe + 1 Stay Ashore = 11 emails)

Crew: Owen Mitchell Spring BI Race - Sat, May 25th 8:00 AM (5 Yes & 0 Maybe + 2 Stay Ashore = 7 emails)

Crew: Lay Day on BI - Sun, May 26th 8:00 AM (4 Yes & 0 Maybe + 2 Stay Ashore = 6 emails)

Crew: BI to Newport Cruise - Mon, May 27th 9:00 AM (4 Yes & 0 Maybe + 2 Stay Ashore = 6 emails)

Crew: JYC Spring Series #3 - Tue, May 28th 5:15 PM (8 Yes & 0 Maybe + 3 Stay Ashore = 11 emails)

Crew: Deliver Newport to Pilot's Point Marina - Wed, May 29th 8:00 AM (2 Yes & 0 Maybe + 1 Stay Ashore = 3 emails)

Crew: Deliver Pilots Point to CPYC - Thu, May 30th 7:30 AM (2 Yes & 0 Maybe + 1 Stay Ashore = 3 emails)

Pop up window appears when mouse over item in list

- To the right of the **To** group selected, you may optionally check the box to exclude *Stay Ashore* Crew from receiving a selected event email
- Check *Individual* or *Group* to select if the message will be sent to all at once, or as individuals
- Under **Subject:** type in the desired subject or leave blank for the default.



# Skipper Directions for Crew Manager

6. Under *Message Content*: type your desired message using the formatting buttons as desired.
7. When complete, scroll down and click the blue *Send Email* button.

A summary message is displayed on the screen showing the results of sending the email.

## 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 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 is required 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
- Tide Graph
- 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



# Skipper Directions for Crew Manager

themes are not allowed because specific Crew Manager functionality is built in the modified Graphene Child theme. Thus Crew Manager may 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.