



Crew Manager

Crew Manager

Custom Boat Websites + Full Featured Crew Management Capabilities

Crew Manager Skippers Manual

Version 2.9
29 February 2020

<http://crew-mgr.com>



Skipper Directions for Crew Manager

Revision History

Version	Date	Comment
2.9	2/29/2020	Added setting to turn off skipper emails for crew availability changes, added extra profile fields and custom report to support Newport - Bermuda race. Added copy events from all sites. Added multiple Skipper Admin option, Reformatted mobile displays. Updated screen shots
2.8	1/8/2020	Removed automatic results send from updating an AI1EC event and added option for sending results to All Posts. Added Send Crew Text button on phones, Select From and Templates with merge fields on Skipper Send Email, Updated on screen text editor with full wysiwyg capability, Updated screen shots
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) via [spreadsheet CSV file upload](#), online import, or individually in the Crew Manager admin panel)
- 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 and optional text if the Crew selected to receive text..
- Optional Crew Hide feature for a "closed visibility" model so only the Skipper sees crew members on the site

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.



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- **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.
- **Custom Reports** - Crew profiles contain extra fields that may be enabled for Passport & Address, Emergency Data and Travel Data. The Skipper may generate a custom report including only the fields desired, and has the option to export a CSV file to use with Excel.
- **Skipper Send Email** - Provides full featured email capability with custom email templates so the Skipper and Crew Administrators 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 to 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

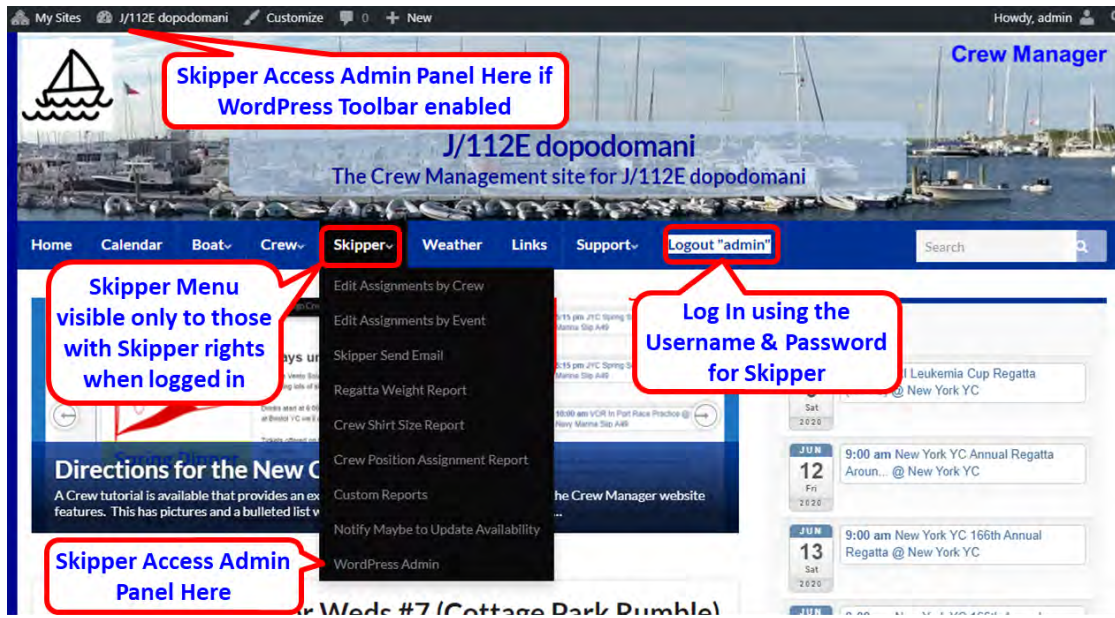
The Skipper and designated Administrators have access to the WordPress Admin panel. Many of the settings are accessed in this area. Accessing the WordPress Admin Panel is as follows.

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*

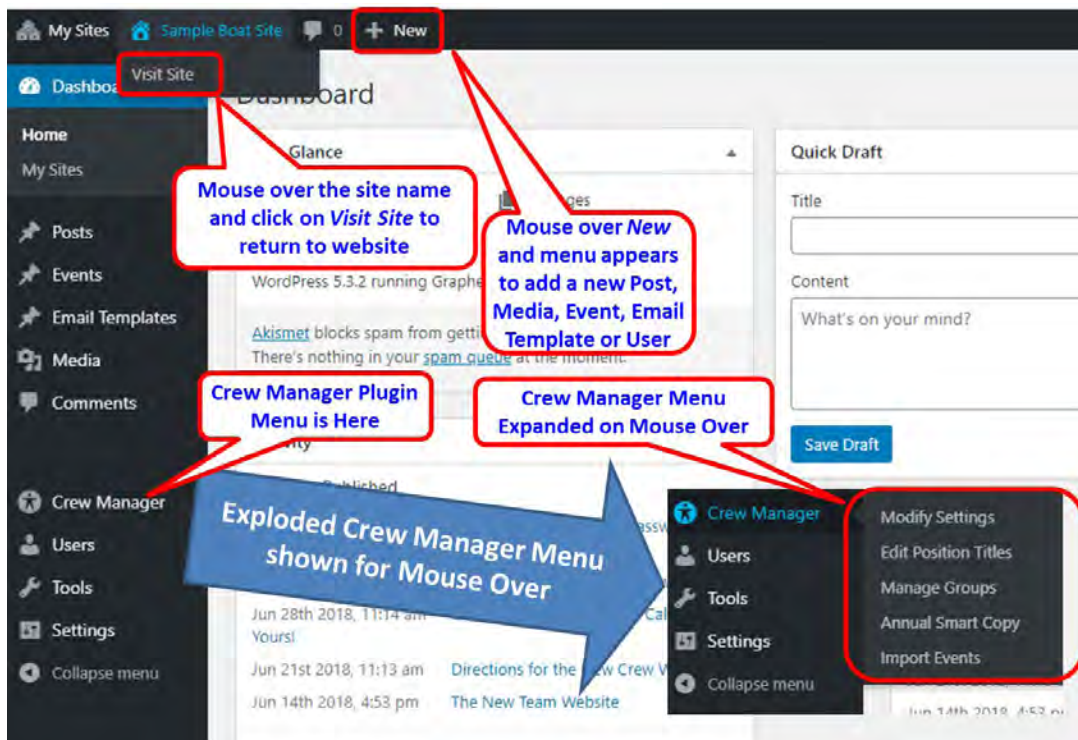
Option 2: If WordPress toolbars enabled click the dashboard icon  at screen top left



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



Load Crew Members

Crew Manager is intended to be a “closed” enrollment system - meaning that new users must be entered by the Skipper. This is done to prevent spammers and unauthorized users gaining 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



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typical boat crews, should be easy to manage. Additional crew members may easily be added at a later date. Crew members are regular WordPress users that are automatically assigned the role as a WordPress *Subscriber*. Should the Skipper desire additional users to help and have upgraded privileges (e.g. to help publish and edit posts, to add and edit users, etc.) additional users may be assigned the role as *Crew Administrator* by the Skipper on the *Crew Manager Modify Settings* screen.

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 to log in. 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

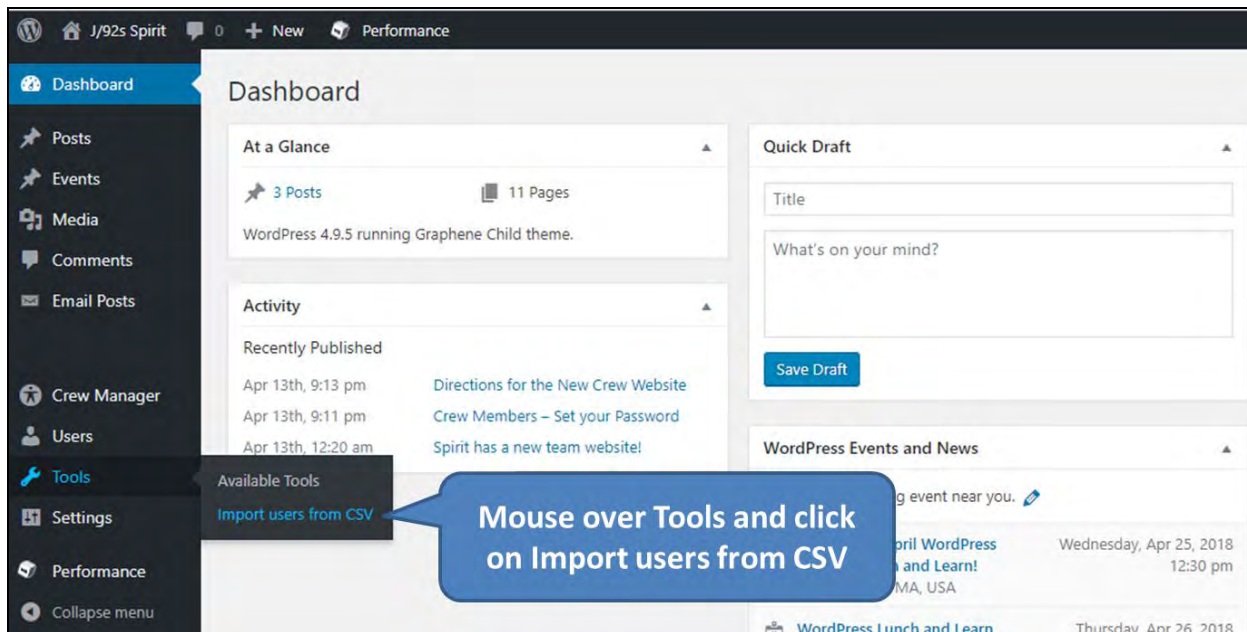
The WordPress Plugin “Import users from CSV with meta” is installed allowing a convenient method to load a list of users all at once. This is typically done when Crew Manager is initially setup for a boat. An Excel spreadsheet template is [available at this link](#) to download and populate with Crew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

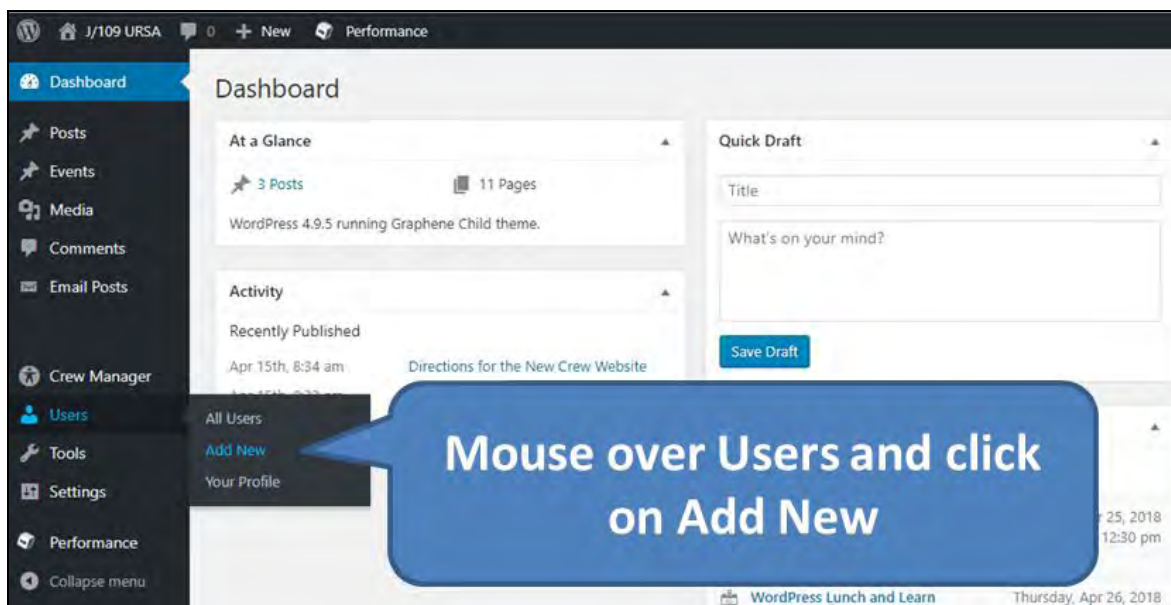
Creating Users Individually

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*.



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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. It provides additional site information and asks that they update their profile 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. *Include on Core Crew Email List* checkbox - Check if you want this crew to receive email messages for the Core Crew group
 - l. *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)
 - m. Shirt Size (dropdown selection)
 - n. Jacket Size (dropdown selection)
 - o. Short Size (dropdown selection)
 - p. Weight in lbs.
 - q. World Sailing Sailor ID
 - r. World Sailing Sailor Classification (dropdown selection)
 - s. US Sailing Membership Number



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- t. Safety at Sea completion date
 - u. CPR / First Aid completion date
 - v. Click the blue button labeled *Add New User*.
5. 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 sidebar on the left contains navigation links. The main area displays a table of users. Annotations with red boxes and arrows highlight specific features:

- A red box at the top of the table header says "Click Header Links to Filter / Sort by a column", pointing to the 'Bulk Actions', 'Apply', 'Change role to...', 'Change', 'Grant Roles', 'Add role...', 'Add', 'Revoke role...', and 'Revoke' links.
- A red box on the right side of the table header says "Last Logged In", pointing to the 'Last Logged In' column header.
- A red box at the bottom of the table says "Mouse over a User row displays links for Edit, Remove, View", pointing to the row for user 'drew'.

Username	ID	Display Name	Name	Email	Role	Posts	Last Logged In
admin	1	Admin	Admin	admin@crew-mgr.com	Administrator	0	Sun - August 25, 2019 @ 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
drew	4	Drew	Drew Callan	drew@crew-mgr.com	Subscriber	0	
dennis					Subscriber	0	
jenny	5	Jenny	Jenny Spithill	jenny@crew-mgr.com	Subscriber	0	
sam	8	Sam	Sam Davies	sam@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 transmitted 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



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after using Crew Manager for 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 may set their default time zone. If this is changed, the default time zone setting for the AI1EC plugin is automatically updated when the time zone is updated in Crew Manager.
- 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.

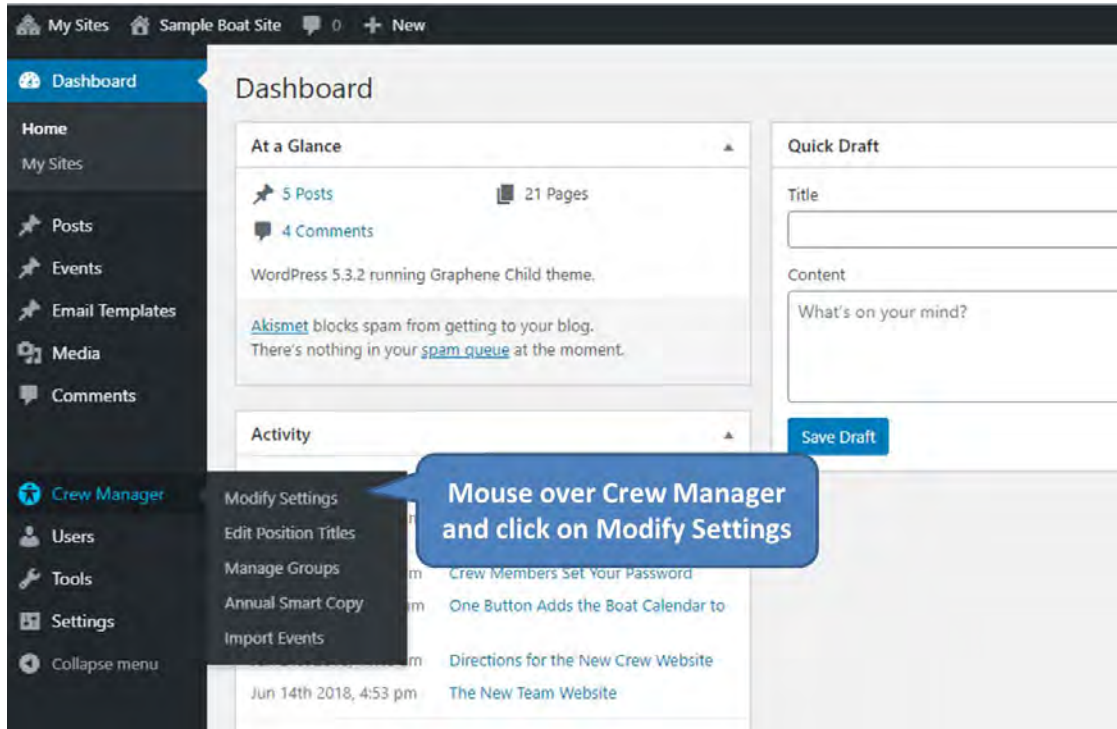
Crew Manager Admin Setup - Modify Settings

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.

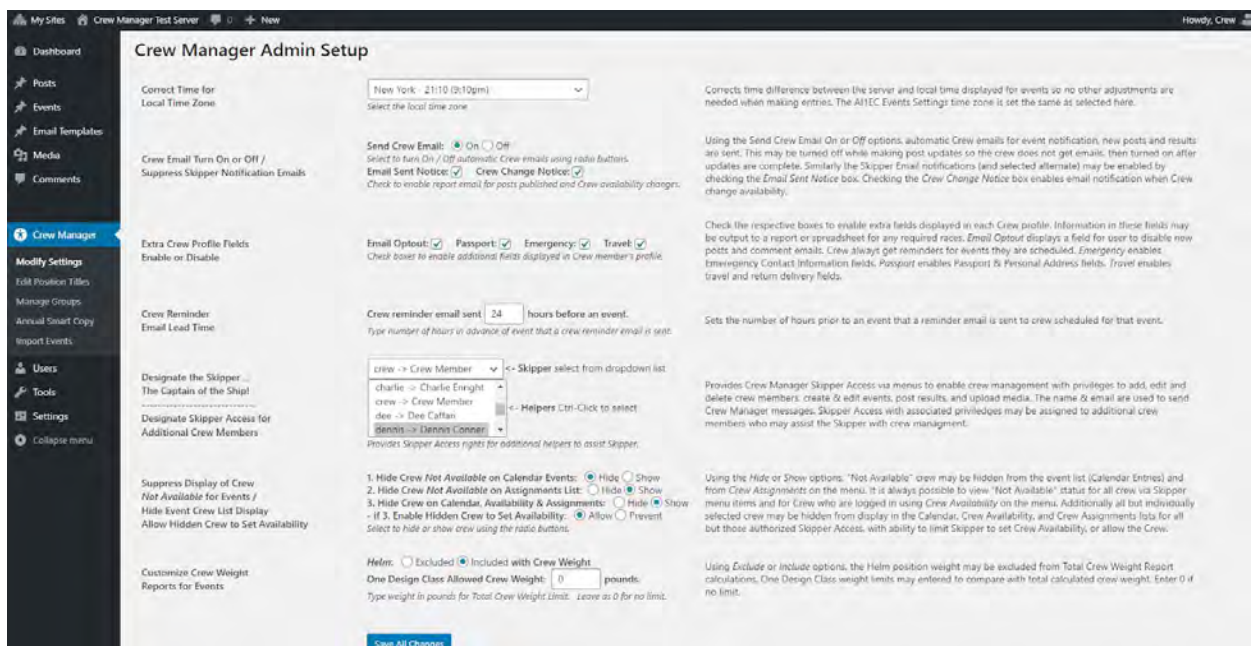
1. Log in to your *Crew Manager* site as the Skipper if you have multiple logins. The *Skipper* menu will appear in the menu bar.
2. Once logged in mouse over *Skipper* on the menu and click on *WordPress Admin*
3. The WordPress Admin screen will load. On the left side menu, mouse over *Crew Manager*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



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



4. **Correct Time for Local Time Zone:** Select the default time zone from the drop down if not New York. The program automatically compensates for the shift between daylight savings and standard time for those time zones that change. The AI1EC Events Settings time zone is automatically set with the same time zone selected.



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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 may check *Email Sent Notice* to receive a completion report after the emails are sent if the option is *On*. The *Crew Change Notice* box enables the Skipper to receive notification emails whenever Crew change availability status.
6. **Extra Crew Profile Fields Enable or Disable:** This allows the Skipper to enable extra fields to be displayed on each Crew profile by checking a checkbox. The fields are: *Email Optout* 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. *Passport* enables fields to input passport information and home address. *Emergency* enables fields to enter information for an emergency contact person. *Travel* enables fields to capture destination arrival & departure dates, accommodations, and travel mode back (e.g. Boat Delivery or Other Transportation).
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 Members:** Using the drop down with Ctrl-Click select additional Crew members who will have Skipper access, if desired. These individuals get 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* 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 with 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



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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. A count with the number of times a position has been assigned is displayed to easily determine if any positions have been assigned to crew members.

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 too many crew have 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 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 automatically 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.



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

Rename, Delete or Add Crew Position Titles

Bar Tender	<input type="checkbox"/> Check to delete	Bar Tender (used 0 times)
Co-Skipper	<input type="checkbox"/> Check to delete	Co-Skipper (used 4 times)
Cook	<input type="checkbox"/> Check to delete	Cook (used 1 time)
Crew	<input type="checkbox"/> Check to delete	Crew (used 233 times)
Flatter	<input type="checkbox"/> Check to delete	Flatter (used 5 times)
Foredeck	<input type="checkbox"/> Check to delete	Foredeck (used 40 times)
Grinder	<input type="checkbox"/> Check to delete	Grinder (used 0 times)
Guest	<input type="checkbox"/> Check to delete	Guest (used 8 times)
Headall Trimmer	<input type="checkbox"/> Check to delete	Headall Trimmer (used 137 times)
Id Trimmer	<input type="checkbox"/> Check to delete	Id Trimmer (used 1 time)
Main Trimmer	<input type="checkbox"/> Check to delete	Main Trimmer (used 85 times)
Man	<input type="checkbox"/> Check to delete	Man (used 66 times)
Navigator	<input type="checkbox"/> Check to delete	Navigator (used 1 time)
Pit	<input type="checkbox"/> Check to delete	Pit (used 72 times)
Rail Mast	<input type="checkbox"/> Check to delete	Rail Mast (used 0 times)
Skipper	<input type="checkbox"/> Check to delete	Skipper (used 99 times)
Snackician	<input type="checkbox"/> Check to delete	Snackician (used 13 times)
Sprinkler Trimmer	<input type="checkbox"/> Check to delete	Sprinkler Trimmer (used 1 time)
Squirrel	<input type="checkbox"/> Check to delete	Squirrel (used 0 times)
Tactician	<input type="checkbox"/> Check to delete	Tactician (used 27 times)
Trainer	<input type="checkbox"/> Check to delete	Trainer (used 0 times)
Watch Captain	<input type="checkbox"/> Check to delete	Watch Captain (used 0 times)
+ - Type new position to be added in the text box		

These Crew Positions are displayed in a dropdown where the Skipper may designate crew member positions for an event. The positions of *Helm*, *Not Assigned*, *Standby Crew* and *Stay Ashore* are available but may not be changed.

- Helm is used for Crew Design weight, and may be excluded from total crew weight when allowed by class rules.
- 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 Ver. This designates a crew member who is not on the boat for the event. The row is color coded with a red dot / pink background.
- Any crew member who has indicated Ver 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 has indicated Ashore for availability and is assigned a position by the Skipper designates a crew member as possible for the event. The row is color coded with a yellow dot / yellow background. If the individual changes availability to Ver the position is confirmed and the row is color coded with a green dot / green background.

To modify a position, edit the text in the box.

To delete a position, check the box next to it. Note - Any crew member assigned that position will need to be reassigned.

To add a position, type text in the box at the bottom.

Click Submit Position Updates to save changes.

[Submit Position Updates](#)

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. The number of times a position is assigned to crew members is located to the right of each position.
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 this 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.

Custom group names may be defined by the Skipper on the same page where Crew are assigned to groups. These custom group name will appear in the *To:* dropdown on the *Skipper Send Email* page. There section at the top of the screen allows the Skipper to add, delete and change Custom Groups. Once added, the groups appear in a column with check boxes by each



Skipper Directions for Crew Manager

crew so they may be selectively added to the group. The picture below shows the screen with sections annotated.

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 scheduled for an event will always receive email notifications for the event, no matter what group assigned to.

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

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

2. 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. The picture above shows this annotated with blue lines.
3. 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*.
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.



Skipper Directions for Crew Manager

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*.



Skipper Directions for Crew Manager

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/Spring Race	Tue, May 7th 2019	Tue, May 5th 2020
<input type="checkbox"/>	Candlelight Cuthbert Race	Sat, Jul 20th 2019	Sat, Jul 18th 2020
<input type="checkbox"/>	Test sailing Cruise	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 Regatta 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"/>	U.S. North American Championships	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 13th 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 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 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/Spring Race - G3 Gong Fl Green 4wc SSE of Hog Island Light	Tue, May 7th 2019	Tue, May 5th 2020
<input checked="" type="checkbox"/>	Candlelight Cuthbert Race - G3 - Southeast of Rose Island	Sat, Jul 20th 2019	Sat, Jul 18th 2020
<input type="checkbox"/>	Test sailing Cruise - My Dock	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 Narragansett Bay for start	Sat, Aug 24th 2019	
<input type="checkbox"/>	Test Regatta 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"/>	U.S. North American Championships - Annapolis YC	Thu, Sep 19th 2019 - Sun, Sep 22nd 2019	

Example: Monday, Apr 15th 2019 advances to Monday, Apr 13th 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"/>	U19 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.
2. Log in as Skipper on the website where events are to be imported
3. Mouse over *Skipper* on the menu and click on *WordPress Admin*
4. On the left side WordPress Admin menu, mouse over *Crew Manager* and click on *Import Events*
5. The importer page opens with the upper section for spreadsheet import and the lower section for Crew Manager Master Site import. Directions are provided at the top of the yellow highlighted import fields.
6. 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 J/109 Vento Solare 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 description.

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
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Choose CSV File: **Choose File** | No file chosen **Import**

Import Events from Crew Manager Master Site to the J/109 Vento Solare Calendar

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

1. Check Copy boxes to select current year events to copy. Mousing over events displays the content. (Tip: Mouse over right half of row while mousing down the screen to rapidly display events. Mousing over the Copy and Date columns prevents the pop-ups and makes it easier to check the boxes).
2. Click the blue **Copy Events** button located below the table.
3. Mouse over events after the screen refreshes. Copied indicators replace the checkmarks and J/109 Vento Solare is listed as the Calendar Source. Mousing over a copied item displays it and provides a direct link to edit.
4. Edit individual events by clicking on the edit icon in the pop-up, or on the left menu mousing over Events then clicking on All Events.

Copy	Date	Calendar Source: Event & Location
<input type="checkbox"/>	Sat, Feb 29th 2020	Crew Manager Master: North U. Yachts Seminar @ Sail Newport
<input type="checkbox"/>	Sat, Apr 4th 2020	Crew Manager Master: Twenty Hundred Club Spring Shore Party @ Hotel Viking
<input type="checkbox"/>	Tue, May 12th 2020	Crew Manager Master: JVC Spring Series #1 @ Dock
<input type="checkbox"/>	Tue, May 19th 2020	Crew Manager Master: JVC Spring Series #2 @ Dock
<input type="checkbox"/>	Fri, May 22nd 2020	Crew Manager Master: Hiram Friday - Check-in Party @ Hyannis YC
<input type="checkbox"/>	Sat, May 23rd 2020	Crew Manager Master: Owen Mitchell Spring BI Race @ Dock

7. 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.

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
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Choose CSV File:

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	Description	Category	Tag
1. Newport - Bermuda Race - Newport Slip	110 Long Wharf Newport, RI 02840	Fri June 19th @ 9:30AM		Royal Bermuda YC		Racing St. David's Lighthouse Division	ORR	
2. Bermuda - Newport Delivery - RBVC Slip	#15 Point Pleasant Road, Hamilton HM 11, Bermuda	Mon June 29th @ 9:30AM	Thu July 2nd @ 5:30PM	Royal Bermuda YC		Return delivery after the prize giving weekend.	Delivery	

- 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.

Copy Events from Any Crew Manager Site Calendar

The Crew Manager main site and other subscriber sites include sailing events of interest that may be of interest to Crew Manager subscribers. Crew Manager subscribers may easily copy these events to their own site. No crew information is imported, only selected events. The following describes how this may be done.

- Log in as Skipper on the website where events are to be imported
- Mouse over *Skipper* on the menu and click on *WordPress Admin*
- On the left side WordPress Admin menu, mouse over *Crew Manager* and click on *Import Events*
- The importer page opens with the upper section for spreadsheet import and the lower section defaults to the Crew Manager Master Site with a dropdown selector to import for other site events. Directions are provided at the top of the event table.



Skipper Directions for Crew Manager

Import to Crew Manager Test Server 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

site	start_date	start_time	end_date	end_time	boat_location	boat_address	club	website_url	registration_url	description	category	flag
------	------------	------------	----------	----------	---------------	--------------	------	-------------	------------------	-------------	----------	------

Choose CSV File: No file chosen

Import Events from **to the Crew Manager Test Server Calendar**

Use the dropdown to select any Crew Manager site and copy multiple events at once. Crew Data is not visible or copied between sites.

- Check Copy boxes to select current year events to copy. Mousing over events displays the content. (Tip: Mouse over right half of row while mousing down the screen to rapidly display events. Mousing over the Copy and Date columns prevents the pop-ups and makes it easier to check the boxes.)
- Click the blue **Copy Events** button located below the table.
- Mouse over events after the screen refreshes. **Copied** indicators replace the checkmarks and **Crew Manager Test Server** is listed as the Calendar Source. Mousing over a copied item displays it and provides a direct link to edit.
- Edit individual events by clicking on the edit icon in the pop-up, or on the left menu mousing over **Events** then clicking on **All Events**.

Copy	Date	Calendar Source: Event & Location
<input type="checkbox"/>	Sat, Feb 29th 2020	Crew Manager - Main Site: North U Tactics Seminar @ Sail Newport
<input type="checkbox"/>	Sat, Apr 4th 2020	Crew Manager - Main Site: Twenty Hundred Club Spring Shore Party @ Hotel Viking
<input type="checkbox"/>	Tue, May 12th 2020	Crew Manager - Main Site: JYC Spring Series #1 @ Dock
<input type="checkbox"/>	Tue, May 19th 2020	Crew Manager - Main Site: JYC Spring Series #2 @ Dock
<input type="checkbox"/>	Fri, May 22nd 2020	Crew Manager - Main Site: Fjavel Friday - Check-in Party @ Hyannis YC
<input type="checkbox"/>	Sat, May 23rd 2020	Crew Manager - Main Site: Fjavel Saturday - Race @ Race @ Dock
<input type="checkbox"/>	Sat, May 23rd 2020	Crew Manager - Main Site: Fjavel Saturday - Race @ Hyannis YC
<input type="checkbox"/>	Sun, May 24th 2020	Crew Manager - Main Site: Fjavel Sunday - Party @ Nantucket Boat Basin

5. Check **Copy** boxes to select current year events to copy. Mousing over events displays the content. (**Tip:** Mouse over right half of row while mousing down the screen to rapidly display events. Mousing over the Copy and Date columns prevents the pop-ups and makes it easier to check the boxes.)
6. Click the blue **Copy Events** button located below the table.
7. A message indicating successful copy with a table showing the copied events is displayed.
8. Mouse over events after the screen refreshes. **Copied** indicators replace the checkmarks and your **Boat Name** is listed as the Calendar Source. Mousing over a copied item displays it and provides a direct link to edit.
9. Edit individual events by clicking on the edit icon in the pop-up, or on the left menu mousing over **Events** then clicking on **All Events**, or 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. You have the ability to assign the events to categories (e.g. PHRF, ORR, etc.), change or add an image and update the event descriptions.

Create New 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' page with several callouts:

- Block where Title is entered:** Points to the 'Add title' text input field.
- 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 includes a list of 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 since it is included in the crew reminders.

The screenshot shows the 'Add New Event' page 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.



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.

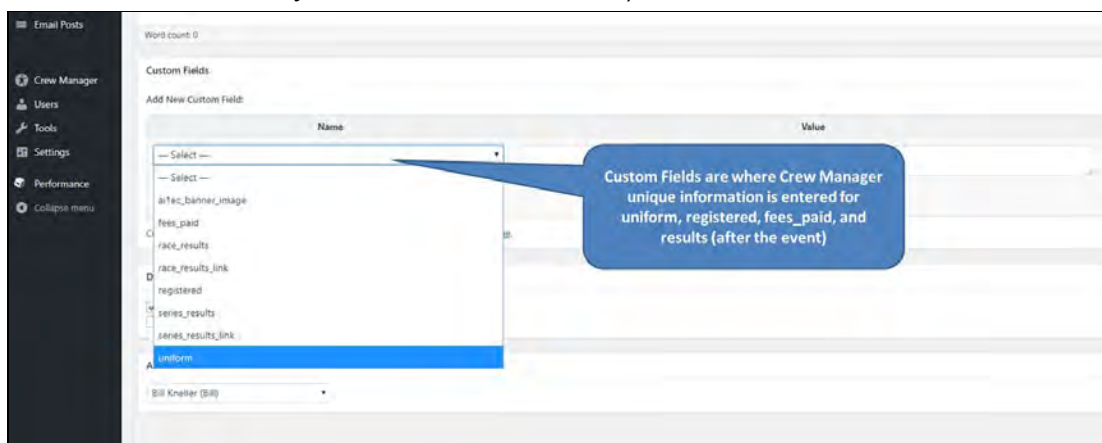
7. *Club or Organizing Authority Info*: leave blank or fill in info if it would help the crew and include the club or event website link.

8. *Text Area for Details*: Type free form text with any information that might help the crew. Tides and currents expected, links to race documents, etc. Note the tabs at the top right or the box labeled *visual* and *text*. *Text* is basic and allows raw html editing. *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.



Skipper Directions for Crew Manager

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. This provides a nice calendar pop up feature.
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).



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.

Tracking Registration & Fee Payment Status

A Regatta Registration Status report is available to the Skipper when logged in by mousing over *Crew* and clicking on *Regatta Registration Status & Payment Entry*. When the Skipper is logged in, this page shows extra fields the Skipper may enter regatta registration information with links, fee payment information and payment links. This handy feature allows the Skipper to keep track of regatta registrations and associated payments/due dates. Information for this report is entered in multiple rows as follows:



Skipper Directions for Crew Manager

- Under the *Registered?* Column enter Yes or No. This may be updated from No to Yes when registration is complete.
- The *Website Link* field allows entry of the regatta or host club website URL including http:// or https://. When a URL is entered, it is combined with the text in the *Registered?* Field to create a hyperlink displayed in the *Registered* column after submission.
- The *Fees Paid* field allows entry of text. Enter "Yes", "No", "Due 6/15/2019", "Due June , 15, 2019" or whatever is desired to display in the value field. If the field contains a date, an email reminder will be sent to the skipper 5 days before this date. Entering *Paid* or *Yes* prevents the reminder being sent
- The *Payment Link* field allows entry of the payment website URL including http:// or https://. When a URL is entered, it is combined with the text in the *Fees Paid* Field to create a hyperlink displayed in the *Fees Paid* column.
- Click the blue *Submit Changes* button when entries are complete

When the registration fee is paid at a future date, edit the *Fees Paid* field to *Yes* or *Paid*. The status will be displayed in the event Calendar entry and the *Regatta Registration Status* page.



Skipper Directions for Crew Manager

Home Calendar Boat~ Crew~ Skipper~ Weather Links Support~ Logout "Bill" Search

Regatta Registration Status

Text visible only to Skipper logged in

Skippers and Admins may enter race registration & fee payment status with associated links. Dates formatted m/d/yyyy in the **Fees Paid** field trigger a reminder email 5 days before due. Use the **Submit Changes** button after entering data in the boxes provided.

To delete data in a field, clear the text and type a minus sign (-) in the text box, then click **Submit Changes**. Entering **Yes** or **Paid** in the **Fees Paid** field prevents the payment due reminder email even if a date is there.

Jump to Next Scheduled Event

2020 One Design -- All Event Tags -- <== Select Year, Event & Tag Category, then click here to update display

<= All Events Displayed - Check Box to display only events with Registered or Fees Paid, then resubmit using button above

Event - Boat Location	Date	Crew Responses			Registered	Fees Paid	Registered?	Website Link	Fees Paid	Payment Link
Next Event: Crew Practice at Cedar Point	05/29/2020	2	3	1			Yes, No	Enter link	DateDue/Yes	Enter link
- Cedar Point YC										
Cedar Point OD Regatta	05/30/2020	4	2	0	Yes	Due 5/21/2020	Yes	http://www.c	Due 5/21/202	https://www.ya
- Cedar Point YC	05/31/2020									
New York YC Annual Regatta Around the Island	06/12/2020						No	https://nyyc.c	DateDue/Yes	Enter link
- Navy Marina Slip A49										
New York YC Annual Regatta (J/109 OD)	06/13/2020	2	2	1	No		No	https://nyyc.c	DateDue/Yes	Enter link
- Navy Marina Slip A49										
NYYC Race Week Tune-up Sess (J/109 OD)	07/14/2020	2	2	2				https://nyyc.c	DateDue/Yes	Enter link
- Navy Marina Slip A49										
NYYC Race Week (J/109 OD)	07/15/2020	2	3	1	No		No	https://nyyc.c	DateDue/Yes	Enter link
- Navy Marina Slip A49										
NYYC Race Week (J/109 OD)	07/16/2020	2	3	1			Yes, No	https://nyyc.c	DateDue/Yes	Enter link
- Navy Marina Slip A49										

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

Floating Submit Changes button only visible to Skipper logged in

Submit Changes

Sample Automatic Email to Skipper with Fee Payment Due Reminder:

From: **Bill Kneller** <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>

Hello Bill Kneller,

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

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.



Skipper Directions for Crew Manager

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 AI1EC 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

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](#)



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.
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.



Skipper Directions for Crew Manager

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. 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. There are multiple screens where the Skipper may set Crew Availability and assign Crew Positions. Opening an Event form the Calendar is a convenient way to make a change. There are also buttons to *Cancel Event Immediately* and on phones there is a button *Compose SMS Text to Crew*. For multiple changes it may be easier to use the Skipper Menu options *Edit Assignments by Event* or *Edit Assignments by Crew*.

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*.

Skipper Access Admin Panel Here if WordPress Toolbar enabled

Skipper Menu visible only to those with Skipper rights when logged in

Log In using the Username & Password for Skipper

Skipper Access Admin Panel Here

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.

(1) Use the Select Crew drop down to get the desired Crew, Year, Event Category & Tag, then click the Select button to the right of it

Jump to Next Scheduled Event

(2) Set Availability & Position for all events at once, then modify as needed below

(3) Set Availability (if Crew did not), designate the Position, and make assignments (Bring Beer!)

(4) Submit Changes when edits are complete

Submit Changes

Set Availability & Position for all events, then edit individually

Event	Date	Location	Available	Crew Comment Input	Position	Assignment
Pleasure Cruise Around	Sat, Apr 27th 10:00 AM	Newport	Yes	Type input here	Skipper	Bring spiced rum
New York YC	Sat, Apr 27th 10:00 AM	Hotel	Yes	Type input here	Skipper	Type text here
Twelve	Sat, Apr 27th 10:00 AM	Hotel	Yes	Type input here	Skipper	Type text here
Short	Sat, Apr 27th 10:00 AM	Hotel	Yes	Type input here	Skipper	Type text here
Instrument training & Practice Sail	Tue, Apr 23rd 5:00 PM	Marina	Yes	Type input here	Helm	rum & cider packet
Instrument	Tue, Apr 23rd 5:00 PM	Marina	Yes	Type input here	Skipper	Type text here
Crew Practice	Tue, May 7th 5:15 PM	Navy Marina	Yes	Type input here	Helm	Andrew's Beer (alr
JYC Spring Series	Tue, May 7th 5:15 PM	Navy Marina	Yes	Type input here	Helm	Type text here

3. Click the blue *Select Crew Name & Year ...to Update* button. The screen will update and load information for the selected Crew member.



4. The entire season is displayed by event 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*



Edit Assignments by Event

Note: Names only show in this view if availability was previously set to Yes, No or Maybe.

3. You may change the Crew members availability to Yes, No or Maybe for any event (only if Availability was previously set for an event)
4. You may designate a Crew position using the position drop down for any event.
5. You may assign the Crew member a task in the text box such as "Bring Beer"
6. Click the floating blue button labeled *Submit Changes* to save the changes
7. 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*.

1. On the top menu, click the down arrow next to *Skipper* then click on *Notify Maybe to Update Availability*.
2. 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*



Skipper Directions for Crew Manager

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*.

1. Choose the Event Category & Tag with Date Range, then click the blue **<=Select Event & Tag Category, Date Range...>** button
2. 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
3. Click the blue *Send Notification Email* button to send a personalized email with checked events consolidated for each crew member

Event Category	Event Tag	Starting From	Through Date				
-- All Event Categ	-- All Event Tags	01/06/2020	05/02/2020	<=Select Event & Tag Category, Date Range, then Click Here to Update			
Set Notify Boxes - Check All, Uncheck All, and change Notify check boxes below as required =>				Check All	Uncheck All	Invert Selection	
Admin							
Event	Date	Time	Location	Position	Available	Crew Comment Input	Notify
Instrument Training & Practice Sail	Wed, Jan 8th	1:30 PM	Navy Marina Slip A49	Not Assigned	Maybe		<input type="checkbox"/>
Bill Kneller							
Event	Date	Time	Location	Position	Available	Crew Comment Input	Notify
Instrument Training & Practice Sail	Wed, Jan 8th	1:30 PM	Navy Marina Slip A49	Not Assigned	Maybe		<input type="checkbox"/>
				Send Notification Email			
Crew Member							
Event	Date	Time	Location	Position	Available	Crew Comment Input	Notify
Instrument Training & Practice Sail	Wed, Jan 8th	1:30 PM	Navy Marina Slip A49	Jib Trimmer	Maybe		<input type="checkbox"/>

3. 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.
4. 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*.

1. Choose the Event Category & Date Range, then click the blue **<=Select Event Category & Date Range...>** button
2. 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
3. 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	<=Select Event Category & Date Range, then Click Here to Update

Recording Race Results

Race results may be entered on existing A1EC 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.



Skipper Directions for Crew Manager

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

Results

Results & Results Entry

Menu item renamed only for 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						
<input type="checkbox"/> <= 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 Link	Email Results	
Sample Event	02/26/2019	1 of 6	3 of 6	1 of 6	http://twentyhu	3 of 6	http://vs.j109.o	No	▼
Instrument Training & Practice Sail	04/23/2019	2 of 3		2 of 3	http://www.jyc	Enter results	Enter link	No	

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

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						
<input type="checkbox"/> <= 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 Link	Email Results	
Sample Event	02/26/2019	1 of 6	3 of 6	1 of 6	http://twentyhu	3 of 6	http://vs.j109.o	No	▼
Instrument Training & Practice Sail	04/23/2019	2 of 3		2 of 3	http://www.jyc	Enter results	Enter link	No	▼
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	No	▼
Canceled: Cuttyhunk Race				2 of 3	Enter link	3 of 4	Enter link	No	▼
Test adding Crew	08/01/2019	111		111	Enter link	Enter results	Enter link	No	▼
Block Island Race	08/03/2019			Enter results	Enter link	Enter results	Enter link	No	▼
Block Island Race Return	08/05/2019			Enter results	Enter link	Enter results	Enter link	No	▼
Prince Henry Race	08/24/2019			Enter results	Enter link	Enter results	Enter link	No	▼
Test Regatta for Payment				Enter results	Enter link	Enter results	Enter link	No	▼
Test Block Island Race				Enter results	http://www.jyc	Enter results	Enter link	No	▼
J/30 North American Championship	09/19/2019 09/22/2019			Enter results	Enter link	Enter results	Enter link	No	▼

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 dropdown in a row is selected for Event Crew or All Posts, the results for that event are emailed to the crew in the selected group



Skipper Directions for Crew Manager

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

The screenshot displays the Vento Solare J/109 crew manager website. The top navigation bar includes links for Home, Calendar, Boat, Crew, Skipper, Weather, Links, Photos, and Log out. The main content area is titled "Calendar" and features a "Expand All" button. A calendar view for April 2018 is shown, with a highlighted event for April 7th: "Twenty Hundred Club Shore Party @ Bristol YC". The event details include a description, ticket information, and a list of crew members with their positions and availability. A sidebar on the right lists upcoming events for April and May.

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



Skipper Directions for Crew Manager

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

Calendar

UPCOMING EVENTS

- JAN 25** Sat 2020: 6:00 pm Annual Vento Solare Party @ Kneller's House
- FEB 29** Sat 2020: 9:00 am North U Tactics Seminar @ Sail Newport
- APR 4** 6:00 pm Twenty Hundred Club Shore Party @ Hotel Viking
- APR 12** Tue 2020: 5:15 pm JYC Spring Series #1 @ Navy Marina Slip A49
- MAY 19** Tue 2020: 5:15 pm JYC Spring Series #2 @ Navy Marina Slip A49

Calendar

Categories: [dropdown]
APRIL - MAY 2018
[Previous] [Next] Collapse All Expand All Agenda

APR 7 Sat 2018: Twenty Hundred Club Shore Party @ Bristol YC
Apr 7 @ 6:00 pm - 9:00 pm [Register] [Tickets]

APR 17 Tue 2018: North Sails Spinnaker Trial @ Borden Light Marina
Apr 17 @ 2:45 pm - 4:45 pm **Edit**

North Sails Spinnaker Trial @ Borden Light Marina
Apr 17 @ 2:45 pm - 4:45 pm

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 Mastronic
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 and tally as *Maybe* - need to verify with Skipper.

Name	Position	Assignment	Available	Crew Comment Input
Bill Kneller	Helm		Yes	Type input here
Brooke Mastronic	Crew		✓	
Kimo Worthington	Crew		✓	

RECENT RESULTS

Event	Date	Results	Series
Around Aquidneck Island	10/18/2019	4:33:12 (3:53:12 Corrected)	
Challenge (Spinnaker)		Best Spinnaker 2019	
Around Aquidneck Island		4:38:35 (3:48:27)	

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

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

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

Word count: 96
Last edited by Bill on July

Custom Fields

ai1ec_banner_image
Delete Update

fees_paid
Delete Update

race_results
Delete Update

--- Select ---

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

Enter new
Add Custom Field

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

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

Click *Add Custom Field* when ready to save the results



Skipper Directions for Crew Manager

5. *Custom Fields*: Click the arrow on the *Select* dropdown, then click *race_results*. In the *Value* field type results (e.g. 1st, 3 of 8, etc.), then click the *Add Custom Field* button. If there is a link to the results on the web, repeat the procedure and select the custom field *race_results_link*. The full link is typed (or pasted) into the *Value* field. 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.

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

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



Skipper Directions for Crew Manager

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

Sample Event **Changes to Validated Sailor Classification**

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

Name	Weight (lbs)	Position	Sailor ID	Declared Sailor Classification	US Sailing #
1 Charlie Enright	185	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)	

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

Active Crew List [Select Crew Group & Click Here to Update](#)

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



Skipper Directions for Crew Manager

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.

A report is displayed with the results similar to below.

Crew Position Assignment Report

2019

-- All Event Categories --

-- All Event Tags --

<== Select Year, Event & Tag Category, then click here to update display

Grouping Color Code: 0 ≤ 25% 25 ≤ 50% 50 ≤ 75% 75 ≤ 100% of greatest value in row.

	Bill	Charlie	Dee	Dennis	samd	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 Directions for Crew Manager

Custom Reports

Crew Manager can produce custom reports for a selected group using any of the fields available in a user's profile. This includes additional fields the Skipper may enable for Passport Information, Emergency Contact and Travel information. Typically this information is required for international distance races such as Newport to Bermuda. The Skipper may select field using check boxes to include in the custom report. Once the report is run, a button is available to download the file in CSV format so that it may be directly read by Excel.

- The Skipper logs in and selects from the *Skipper* menu *Custom Reports*
- A group dropdown allows selection of predefined and custom groups. Select the desired group, and check boxes for the fields to be displayed, then click the blue button next to the group dropdown to update the display

Custom Reports

(1) Defaults to Active Crew Group – select other groups as desired using the dropdown.

Default View When First Opened

Create a Custom Report with selectable fields and download a CSV file for Excel

Note: Passport Data, Emergency Contact & Travel fields may be enabled in Crew Manager Modify Settings in WordPress Admin.

1. Choose the Crew Group using the dropdown.
2. Check boxes for desired fields to include in the report.
3. Click the blue <=Select Crew Group & Desired Fields & Click Here to Update button.
4. Click the blue Download xxxxx.csv button below the table to download the file to your computer.

Active Group Displayed

Active Crew List

<=Select Crew Group & Desired Fields & Click Here to Update

(2) Basic fields displayed with default selection for First Name, Last Name and Email.

Basic: ☒ First Name | ☒ Last Name | ☒ Email | ☐ Mobile | ☐ Carrier | ☐ Shirt Size | ☐ Short Size | ☐ Jacket Size | ☐ Weight | ☐ World Sailing ID | ☐ Sailor Classification | ☐ US Sailing ID | ☐ Safety at Sea Date | ☐ CPR Date |

Passport: ☐ Full Name | ☐ Passport Number | ☐ Expiration | ☐ City Issued | ☐ Country Issued | ☐ Formatted Address | ☐ Street Address | ☐ Address 2nd line | ☐ City | ☐ State | ☐ Zip |

Emergency Contact: ☐ Emergency Contact | ☐ Emergency Phone | ☐ Emergency Email | ☐ Formatted Emergency Address | ☐ Emergency Street Address | ☐ Emergency Address 2nd line | ☐ Emergency City | ☐ Emergency State | ☐ Emergency Zip |

Travel: ☐ Arrival Date | ☐ Hotel | ☐ Hotel Address | ☐ Departure Date | ☐ Departure Mode |

First Name	Last Name	Email
Charlie	Enright	charlie@crew-mgr.com
Dee	Caffari	dee@crew-mgr.com
Dennis	Conner	dennis@crew-mgr.com
Jimmy	Spithill	jimmy@crew-mgr.com
Sam	Davies	SamD@crew-mgr.com
William	Bligh	captain@crew-mgr.com

(3) Additional fields displayed are enabled in Crew Manager Modify Settings available in WordPress Admin

Download active.csv <=Click to download as CSV file for Excel import

- The customized report for the Active Crew List is displayed below with passport information. The blue Download active.csv button may be clicked to download a CSV formatted file that has the same information as the screen report. Note that there are so many fields available, it is possible to produce a report that is difficult to see on the screen. Downloading this as a CSV file and opening in Excel allows formatting as desired.



Skipper Directions for Crew Manager

Custom Reports

Customized View After Submit

Create a Custom Report with selectable fields and download a CSV file for Excel

Note: Passport Data, Emergency Contact & Travel fields may be enabled in Crew Manager Modify Settings in WordPress Admin.

1. Choose the Crew Group using the dropdown.
2. Check boxes for desired fields to include in the report.
3. Click the blue <=Select Crew Group & Desired Fields & Click Here to Update button.
4. Click the blue Download xxxxx.csv button below the table to download the file to your computer.

Active Group Displayed

Active Crew List <=Select Crew Group & Desired Fields & Click Here to Update

Basic: ☒ First Name | ☒ Last Name | ☒ Email | ☐ Mobile | ☐ Carrier | ☐ Shirt Size | ☐ Short Size | ☐ Jacket Size | ☐ Weight | ☐ World Sailing ID | ☐ Sailor Classification | ☐ US Sailing ID | ☐ Safety at Sea Date | ☐ CPR Date |

Passport: ☒ Full Name | ☒ Passport Number | ☒ Expiration | ☒ City Issued | ☒ Country Issued | ☐ Formatted Address | ☐ Street Address | ☐ Address 2nd line | ☐ City | ☐ State | ☐ Zip |

Emergency Contact: ☐ Emergency Contact | ☐ Emergency Phone | ☐ Emergency Email | ☐ Formatted Emergency Address | ☐ Emergency Street Address | ☐ Emergency Address 2nd line | ☐ Emergency City | ☐ Emergency State | ☐ Emergency Zip |

Travel: ☐ Arrival Date | ☐ Hotel | ☐ Hotel Address | ☐ Departure Date | ☐ Departure Mode |

First Name	Last Name	Email	Full Name	Passport Number	Expiration	City Issued	Country Issued
Charlie	Enright	charlie@crew-mgr.com	Charles Francis Enright	D2345678910	9/18/2015	Boston	United States
Dee	Caffari	dee@crew-mgr.com	Dee NMN Caffari	GBR43526124	8/13/2016	London	United Kingdom
Dennis	Conner	dennis@crew-mgr.com	Dennis John Connor	D2314652736	9/20/2016	Los Angeles	United States
Jimmy	Spithill	jimmy@crew-mgr.com	James Ozzy Spithill	AUS762453142	10/14/2018	Adelaide	Australia
Sam	Davies	SamD@crew-mgr.com	Samantha Bee Davies	GB76234516	4/19/2019	London	United Kingdom
William	Bligh	captain@crew-mgr.com	William Joseph Bligh	F65246175342	3/21/2019	Miami	United States

Download active.csv <=Click to download as CSV file for Excel import

Basic fields selected First Name, Last Name and Email.

(3) Additional fields selected Full Name, Passport Number, Expiration, City Issued, Country Issued

Click Download active.csv button to save file to computer

Skipper Send Email

Provides full featured email capability so the Skipper and Crew Administrators 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:

- Email templates are selectable from a dropdown for personalized "Merge Print" messages and a general message to a group. These may be edited by the Skipper, and new templates created.
- The Skipper or Crew Administrator may select who the message is from using a dropdown that contains only Crew Administrators or Website Administrators.
- 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. An additional group called *Crew having Mobile Number with No Carrier Selected* allows the Skipper to send an email and request a carrier be set in the Crew members profile. 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"



Skipper Directions for Crew Manager

- 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 Send Email

Mail Template: Default – no merge print <-- Select this first - Screen updates, any changes will be lost

From: Crew Member [crew@crew-mgr.com] <-- Select this first - Screen will update and any changes will be lost

To: -- Select Email Group to Send Message-- <-- 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: If left blank defaults to: A Message from the Sample Boat Site Skipper

Append Event: -- Select Optional Event to Append Link & Content--


Message Content:

[Add Media](#) Visual Text

File Edit View Insert Format Tools Table

Paragraph B I “ ” List Bulleted Numbered Link Unlink Image Table

Georgia 12pt



Type over text here

[Crew Member](#)

[Sample Boat Site](#)

[Send Email](#)

- Select template in the dropdown by **Mail Template**. This initializes the message content
- Select email sender in the dropdown by **From**. This updates the signature block and return email address.
- 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**:
- Select an event in the **Append Event** dropdown to optionally append an event link with the event content below your signature
- Type message in the **Message Content** area and format using the toolbar below **Message Content**. The following variables may be used to automatically insert the individual's data when sent to an **Individual** (not **Group**):
%firstname%, %lastname%, %email%, %mobile%, %carrier%, %shirt_size%, %short_size%, %jacket_size%, %weight%, %isaf_number%, %isaf_classification%, %ussailing%
- Click **Send Email** to send the message.

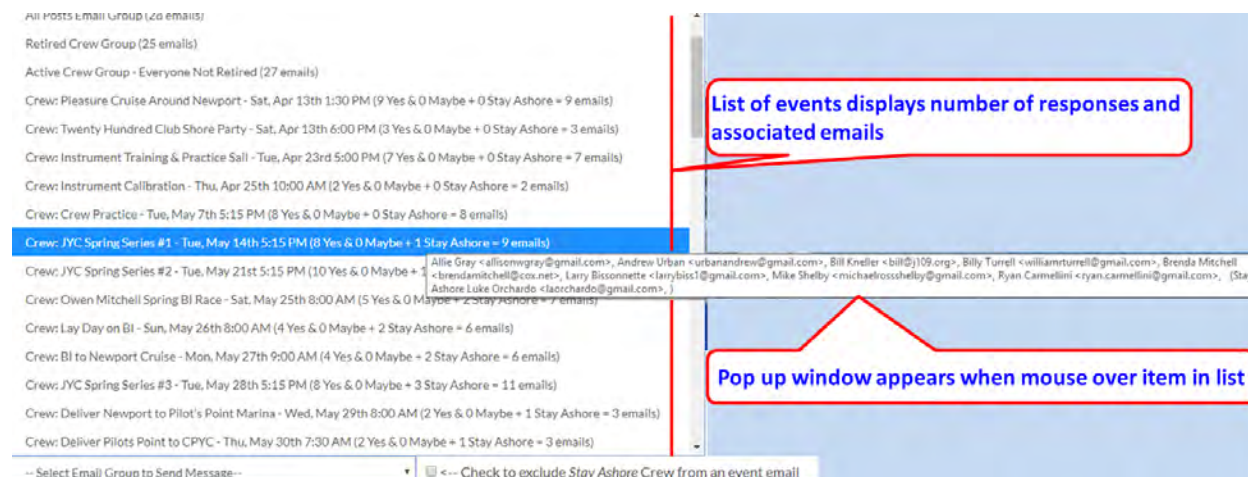
2. Next to **Mail Template**: select the desired template. If the template will use merge variables (e.g. %firstname% %lastname%), the data saved in the person's profile will be inserted. All messages with merge variables must use the **Individual** (not **Group**) selection or the variables will not be populated with the user's information. The screen will refresh momentarily when the dropdown is changed. The message content area is



Skipper Directions for Crew Manager

updated with the selected template. **Note:** Do this step first as any changes made on other fields including the text area will be lost when the screen is refreshed.

3. Next to *From*: select the desired person to be listed as the sender. This will use the displayed name and email address to send the message. The screen will refresh momentarily when the dropdown is changed. The signature block is updated with the selected name and email address. **Note:** Do this prior to making any changes in the text area, or it will be lost when the screen is refreshed.
4. 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). Events for the past 90 days plus all future events are listed.



5. 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
6. Check *Individual* or *Group* to select if the message will be sent to all at once, or as individuals. *Individual* must be checked when using merge print variables.
7. Under *Subject*: type in the desired subject or leave blank for the default.
8. Optionally use *Append Event*: dropdown to include the link and content of a selected event after the signature on the message. Events for the past 30 days plus all future events are listed.
9. Under *Message Content*: type your desired message using the formatting buttons as desired. There is a full featured editing menu and toolbar to format the message. The following variables may be inserted in the message and will be replaced by information in the user's profile: %firstname%, %lastname%, %email%, %mobile%, %carrier%, %shirt_size%, %short_size%, %jacket_size%, %weight%, %isaf_number%, %isaf_classification%, %ussailing%. These may be handy if you want to verify information for a regatta, or confirm sizes to purchase crew swag.
10. 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.



Skipper Directions for Crew Manager

Create or Edit Email Templates

Email templates provide pre-formatted content and style for Skipper sent emails. Multiple templates may be created and used whenever desired. Two templates are provided - . “Default - no merge print” and “Merge Print - Hello Firstname Lastname”. Merge print templates may be handy if you want to crew to validate information for a regatta, or confirm sizes to purchase swag. To edit or create a new template, assuming you are already logged in as the Skipper, do the following.

1. Mouse over *Skipper* on the menu and click on *WordPress Admin*.
2. The WordPress Admin screen will load. On the left side menu, mouse over *Email Template* and click on *All Email Templates*
3. The Email Templates screen will load with all existing templates loaded in a table.

The screenshot shows the WordPress 'Email Templates' screen. The left sidebar has a menu with 'Email Templates' selected. The main content area shows a table of templates. Annotations with red boxes and arrows point to specific elements:

- A red box around the 'Add New' button at the top left of the main content area, with the text: "Click button to create a new template".
- A red box around the row for 'Merge Print - Hello Firstname Lastname', with the text: "Mouse over row displays Edit, Quick Edit, Trash. View, Clone to Draft - click for desired action".
- A red box around the 'Default - no merge print' row, with the text: "Initial templates displayed in list may be edited as desired, and additional templates saved".

<input type="checkbox"/>	Title	Date
<input type="checkbox"/>	Merge Print - Hello Firstname Lastname Edit Quick Edit Trash View Clone to Draft	Published 2019/12/27
<input type="checkbox"/>	Default - no merge print	Published 2019/12/27
<input type="checkbox"/>	Title	Date

4. To create a new template click the *Add New* button at the top, or to edit an existing template, mouse over the row with the desired template to edit then click on the *Edit* button. The next screen shown will be the same, with content already populated if you are performing an edit.



Skipper Directions for Crew Manager

The screenshot shows the 'Edit Email Template' page in WordPress. The left sidebar contains navigation links: My Sites, Greta Ruth, New, View Email Template, Dashboard, Posts, Events, Email Templates (selected), All Email Templates, Add New, Media, Comments, Crew Manager, Users, Tools, Settings, and Collapse menu. The main content area is titled 'Edit Email Template' and shows a template named 'Merge Print - Hello Firstname Lastname'. The template content includes a logo, a banner with the text 'Crew Manager Custom Boat Websites + Full Featured Crew Management Capabilities', and a personalized greeting 'Hello %firstname% %lastname%'. The interface includes a 'Publish / Update Button' on the right, a 'Visual' and 'Text' tab selector, and a 'Custom Fields' section at the bottom. Callouts provide detailed instructions for each of these elements.

Template Name typed in this block

Publish / Update Button

Visual **Text**

Tab select Visual mode (WYSIWYG Editor) and Text mode (HTML & codes)

Excerpt provides more complete description when choosing a template to use

Template Content inserted here using the formatting menu and toolbar buttons

Custom Fields – Select Merge Variables from the Name dropdown and type Yes in the value field, the click Update button

This section for Merge Print Templates having %variables% only!

5. The template may contain text and graphics. For merge print the following variables are used so that the information stored in a user's profiles is inserted in place of the variable: %firstname%, %lastname%, %email%, %mobile%, %carrier%, %shirt_size%, %short_size%, %jacket_size%, %weight%, %isaf_number%, %isaf_classification%, %ussailing%. Graphics should be a maximum of 733px wide to show properly in an email. The graphic may be linked, or stored in the Media Library available on the left WordPress admin menu. There is no need to insert a signature in the template, as these are automatically added after the template when a message is created.
6. When finished editing / creating the template, click the blue button labeled *Publish* if the template has not yet been published. If already published the button is labeled *Update*.

Skipper Compose SMS Text Message to Crew

When a Skipper is logged in on a mobile phone, there is a blue button on each event below the red *Cancel Event Immediately* button labeled *Compose SMS Text to Crew*. When this button is clicked, it opens the SMS text application on a phone and populates the address field with the mobile number of each crew member assigned on the event. Crew *Not Available* or marked as *Stay Ashore* are not included in the text. The button does not appear on a desktop display. A similar capability for group SMS Text is available to the Skipper on the Crew Roster page.



Skipper Directions for Crew Manager

The picture below shows the *Compose SMS Text to Crew* button on a phone display.

Name	Position	Assignment
Crew Member	<input checked="" type="radio"/> Crew	
Charlie Enright	<input type="radio"/> Not Assigned	
Sam Davies	<input type="radio"/> Not Assigned	
William Bligh	<input type="radio"/> Not Assigned	
Admin	<input checked="" type="radio"/> Bar Tender	
Bill Kneller	<input checked="" type="radio"/> Not Assigned	

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

--: ▾ --\$ ▾ Type text here

Total Crew 4 = Confirmed (1) + Maybe (3)

Submit Availability Change

Cancel Event Immediately

Compose SMS Text to Crew

Post # 319

Customize a Crew Manager Site

The site may be customized by a designated “power user” or using [Site Customizing Services Available](#) on the Crew Manager shop.

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 to Customizing Site

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.



Skipper Directions for Crew Manager

A separate login account requiring a different email address from the Skipper email is required to setup this access. This is to make sure inadvertent site changes are not made 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
- Crew Manager
- Import users from CSV with meta
- Tide Graph
- TinyMCE Advanced Editor
- User Role Editor

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

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

Image Sizes

- The Header image may be replaced with another image sized 1170px x 200px
- The Email template header image is 733px x 138px
- All in One Event Calendar featured image 510px x 285px (other sizes will be scaled)

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.

Site Customizing Services Available

The Crew Manager website will be customized so that the style is uniquely matched to the boat / team. The customization includes desired colors with images for headers, website background



Skipper Directions for Crew Manager

and email templates using customer supplied pictures. There is no change to website operation or capability.

- Custom colors may be applied to the background, menu & associated text, header and footer. Colors may be chosen using the [Google Color Picker](#) - the desired hex values (format #000000) are supplied in the fields contained on the [Customize Crew Manager Website](#) offering in the Crew Manager shop.
- Custom images (supplied by the customer) are used to generate the website header and replace the Crew Manager logo image, if desired, a website background image (replaces solid color background), and email template header image (replaces Crew Manager Logo image)
- Custom images will be either cropped or resized (stretched/shrunk) to fit the area. Optimal sizes for the Header image is 1170px by 200px. The Email template header optimal image size is 733px by 138px. The All in One Event Calendar featured optimal image size is 510px by 285px (other sizes will be scaled). Acceptable file formats are bmp, jpg, png and gif.
- Desired text may be overlaid on images and saved with the image to create custom logos. This can be done as part of the customization and should be annotated in the order comments.
- All formatted custom images are stored on the website's media library and are accessible to the Skipper when logged in.
- You will be notified when the updates are made so you may review the changes. Once reviewed, you may accept as is, or provide feedback for changes to be made.

Note: Upload image files to be used for customizing before adding to cart. Provide any special instructions in the comment field when placing the order. Color default hex values setup on Crew Manager sites are included in the field labels. You may enter any desired new values. Use the [Google Color Picker](#) to determine the hexadecimal values for the colors you would like to change. Any color fields left blank will maintain the existing default color scheme.