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.

- **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

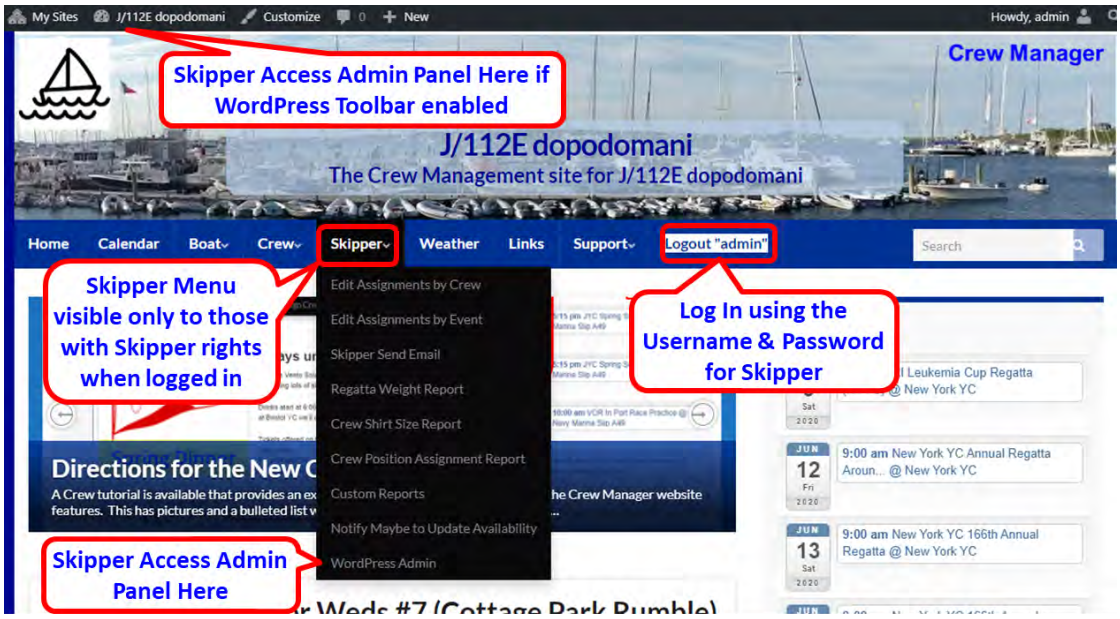
Skipper Log In to WordPress Admin Panel

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.

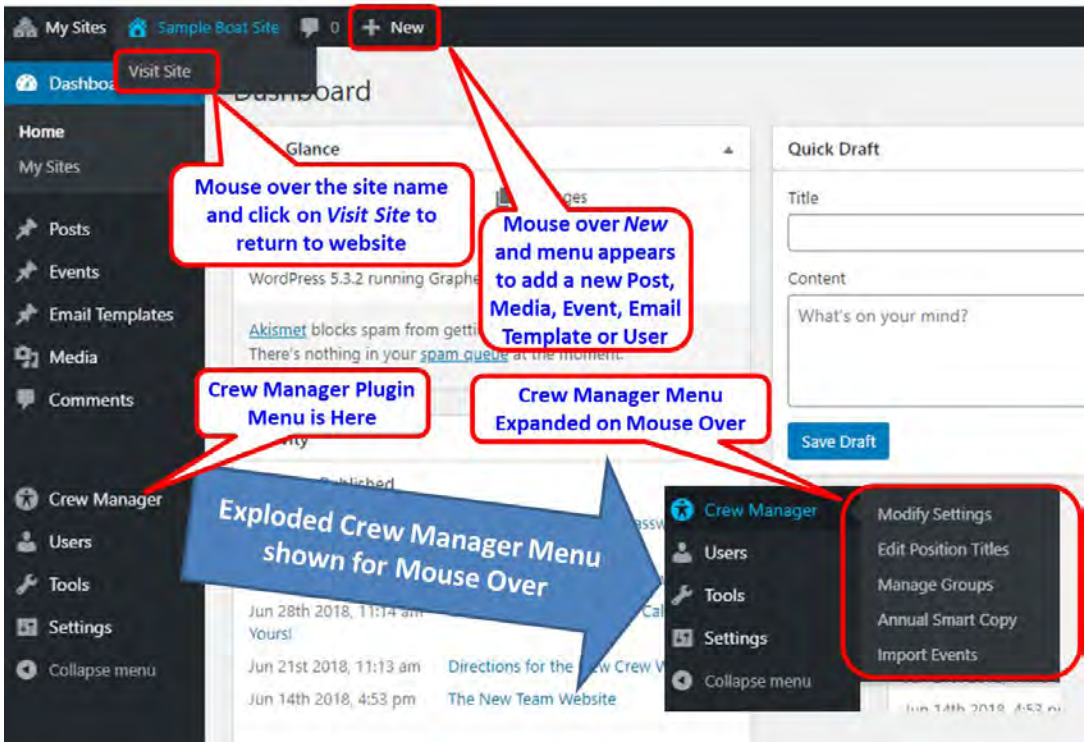
1. Log in to your *Crew Manager* site as the Skipper or Administrator if you have multiple logins. The *Skipper* menu will appear in the menu bar. The *Skipper* menu is not visible to Crew or to people who are not logged in. **Note:** The Skipper may also set the WordPress toolbar to display at the top 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

Skipper Directions for Crew Manager



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



Load Crew Members

Crew Manager is intended to be a “closed” enrollment system - meaning that new users must be entered by the Skipper. This is done to prevent spammers and unauthorized users gaining system access using “open” enrollment where anyone may subscribe via the front end. This trade-off requires a little more work for the Skipper to set up, but based on the limited size of

typical boat crews, should be easy to manage. Additional crew members may easily be added 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.

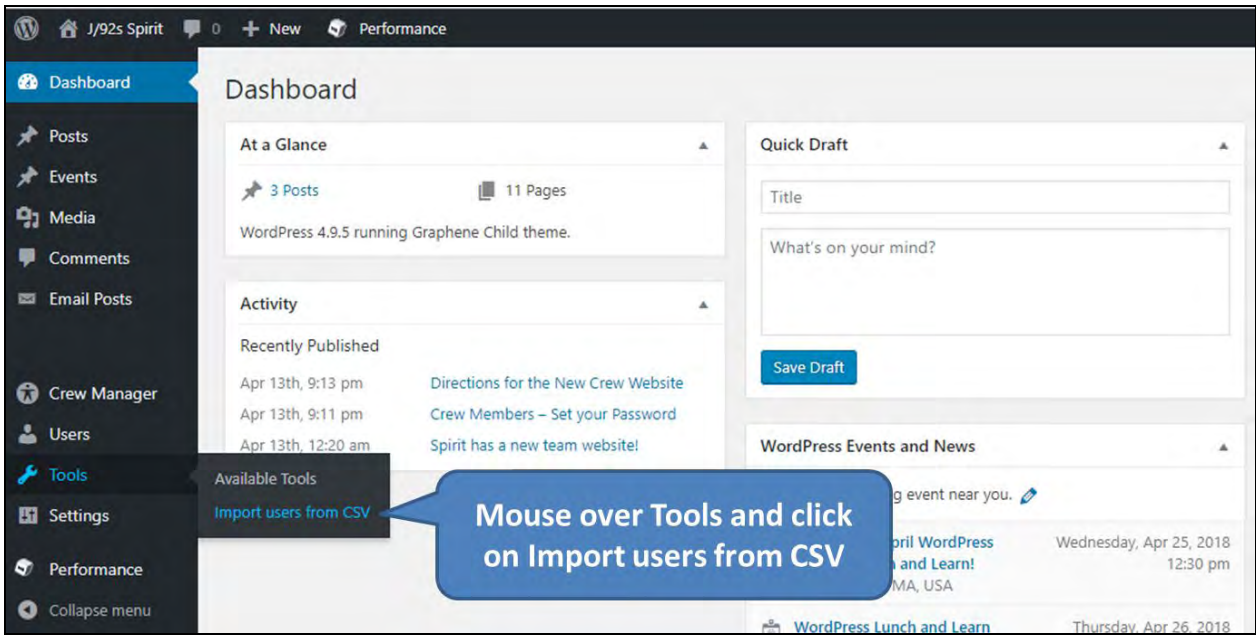
The only information shown to the public (e.g. people who visit the site but are not logged in) is the short display name. The Username and display name fields are usually populated with the same information for an individual user but are not required to be the same. Typically the display name is a nick 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*.

5. The WordPress Admin screen will load. On the left side menu, mouse over *Tools* and click on *Import users from CSV*.

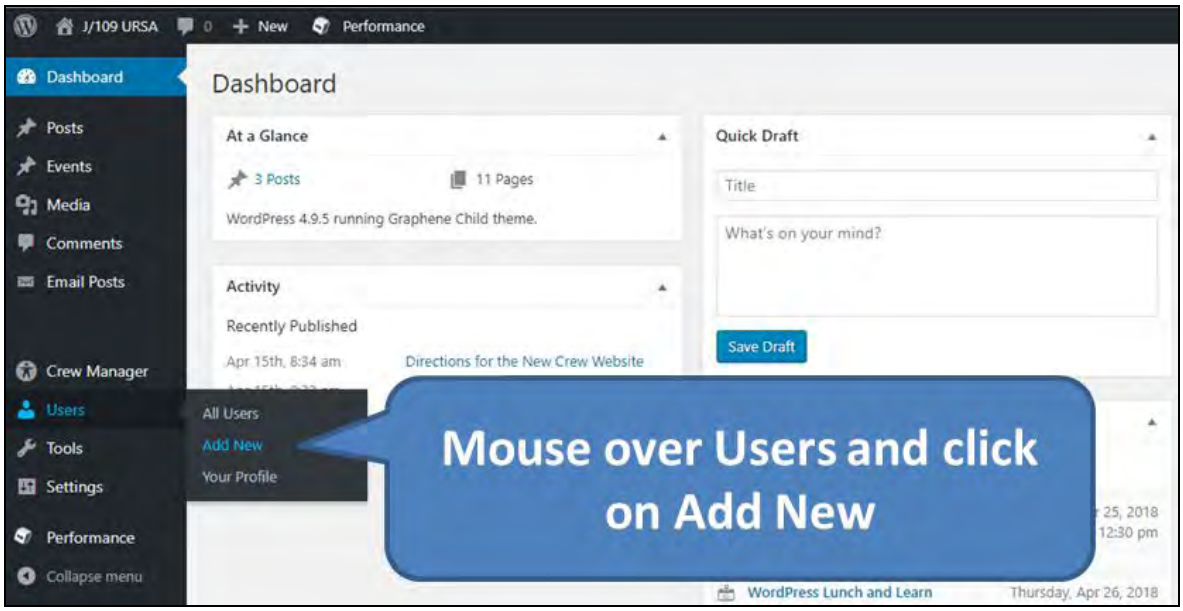


6. The plugin will load and provide a plethora of options. If this is a one time upload, use the default settings. Click on the *Choose File* button located to the right of the *CSV file (required)* label. When the dialog box opens, navigate to the directory where the CSV file containing the Crew was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

3. The WordPress Admin screen will load. On the left side menu, mouse over *Users* and click on *Add New*



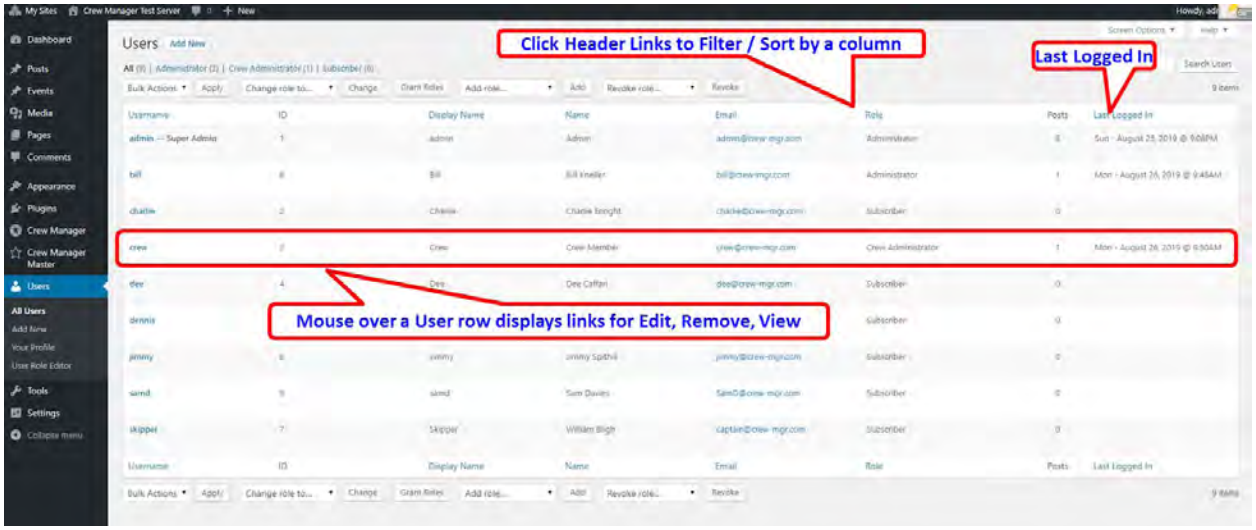
4. Scroll down past the section labeled *Add Existing User* (only displayed for Superadmins) until you reach the section labeled *Add New User*. Enter information in the following fields (* indicates required field):
    a. *Username (must be lowercase, no spaces, numbers or special characters)
    b. *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

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



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

after using Crew Manager for a while. This notification may be disabled or enabled at any time.

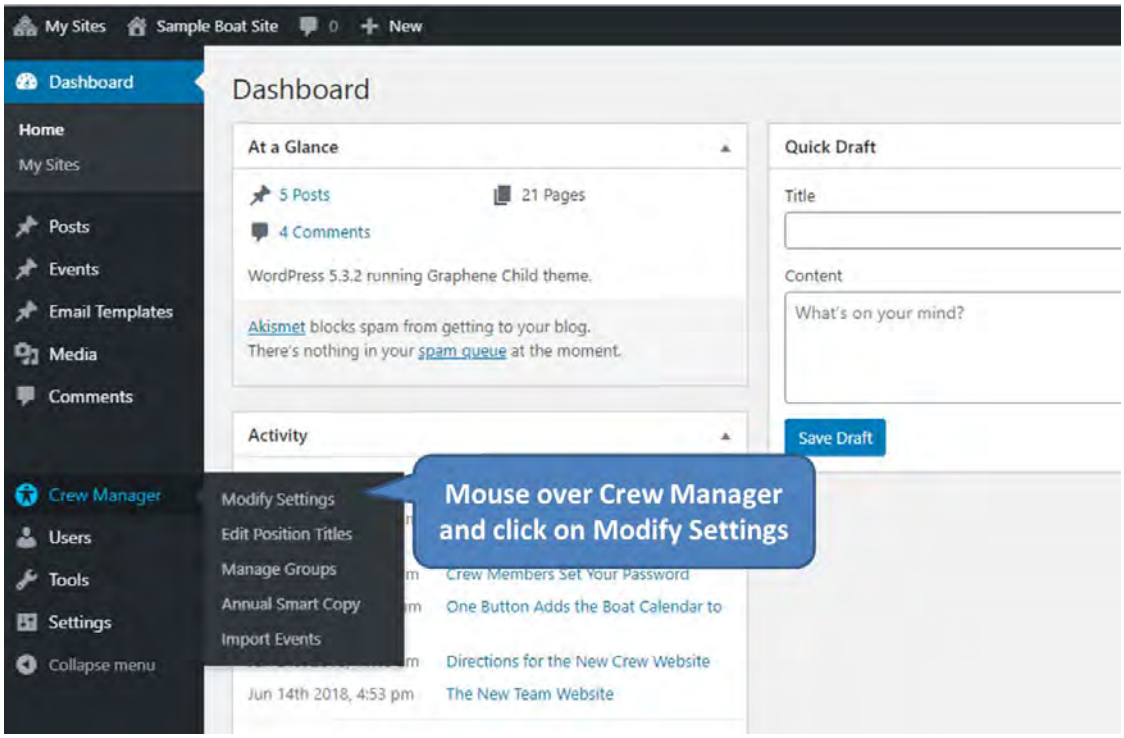
- The Skipper moves to another location with the boat in a different time zone. Not very common, but the plugin was designed so Skippers no matter where they are located may set their default time zone. If this is changed, the default time zone setting for the AI1EC plugin is automatically updated when 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

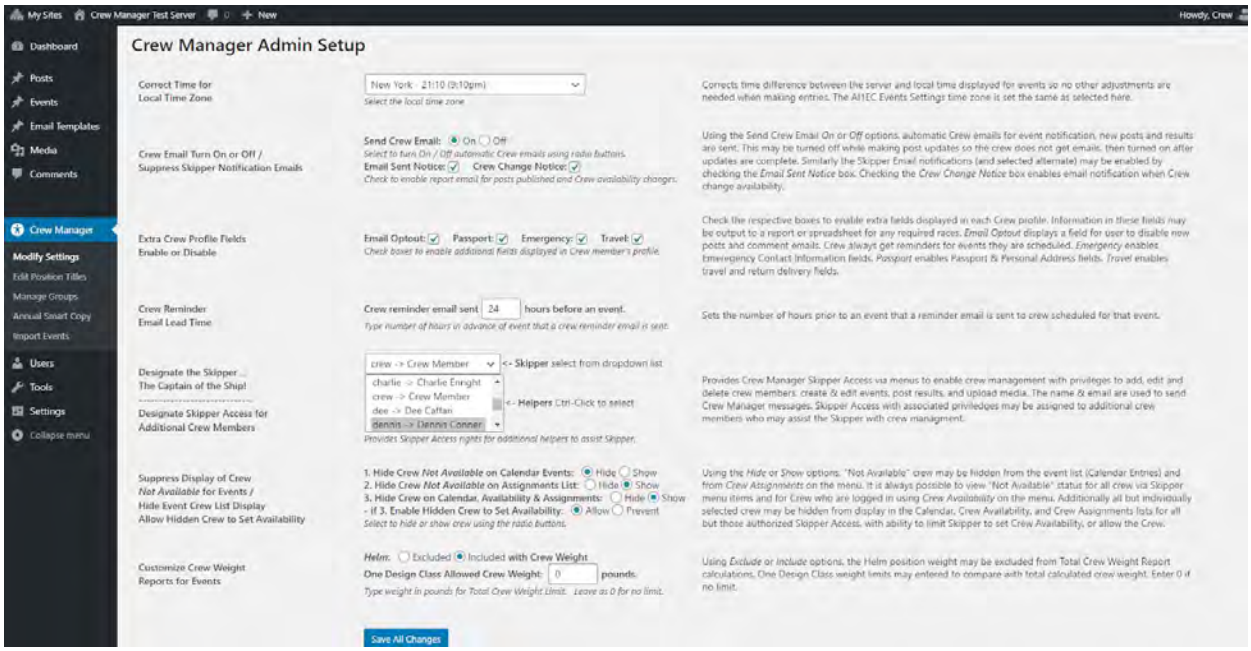
The default settings for Crew Manager are set and saved from this menu. The first time the Skipper logs in to Crew Manager, this screen should be accessed and reviewed, enter any changes desired, and save the settings. This is a one time action that is only needed again should any of the setting options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

Skipper Directions for Crew Manager



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.

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

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.

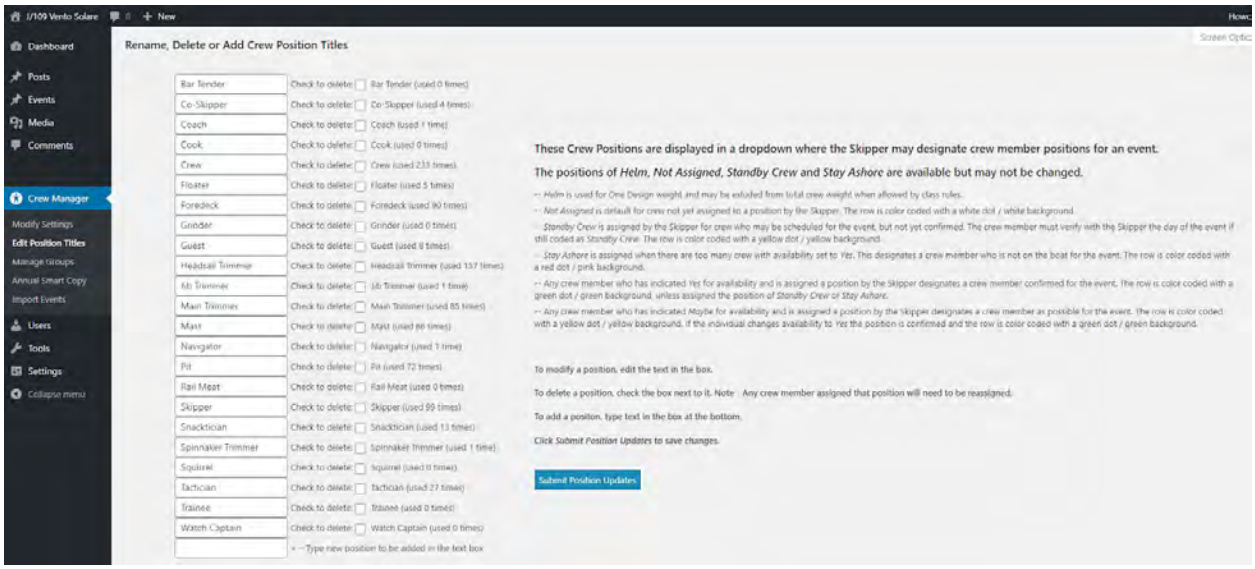
Any crew member who indicated *Yes* for availability and is assigned a position by the Skipper designates a crew member confirmed for the event. The row is color coded with a green dot / green background, unless assigned the position of *Standby Crew* or *Stay Ashore*.

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.

Skipper Directions for Crew Manager

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



2. To modify a position title, edit the text in the white text boxes to the desired position title to be displayed. This can be done for multiple positions at once.
3. To delete a position, check the delete box next to the position name. This can be done for multiple positions at once. 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.

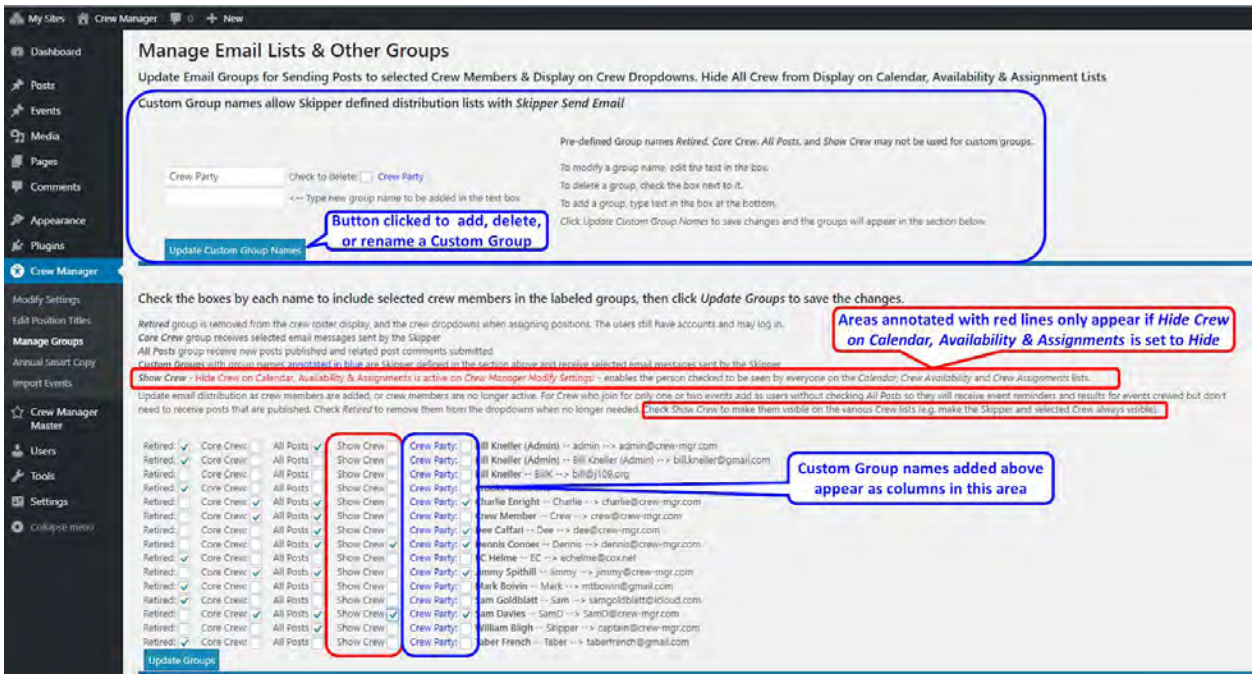
Custom group names may be defined by the Skipper on the same page where Crew are assigned to groups. These custom group name will appear in the *To:* dropdown on the *Skipper Send Email* page. There section at the top of the screen allows the Skipper to add, delete and change Custom Groups. Once added,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

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.

Copy Past Season Schedule - Annual Smart Copy

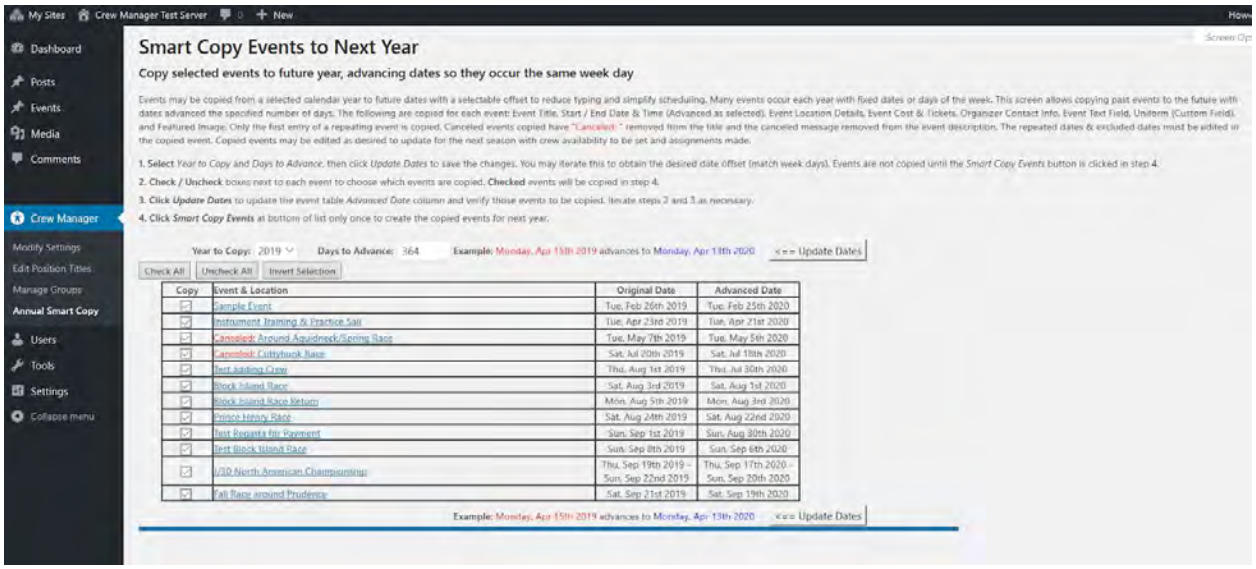
After Crew Manager has been used for a season, a new schedule may be easily copied from a previous season. The Skipper may access Annual Smart Copy via the admin screen to allow copying selected events to the next season. Events may be copied from a selected calendar year to future dates with a selectable 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.

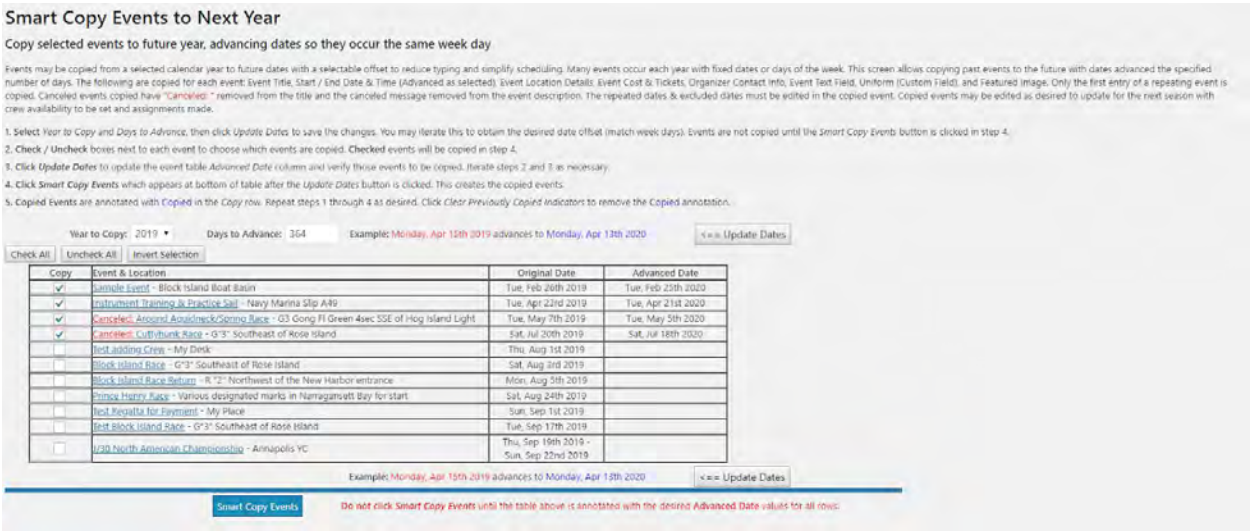
1. On the left side menu, mouse over *Crew Manager* and click on *Annual Smart Copy*.

Skipper Directions for Crew Manager



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.

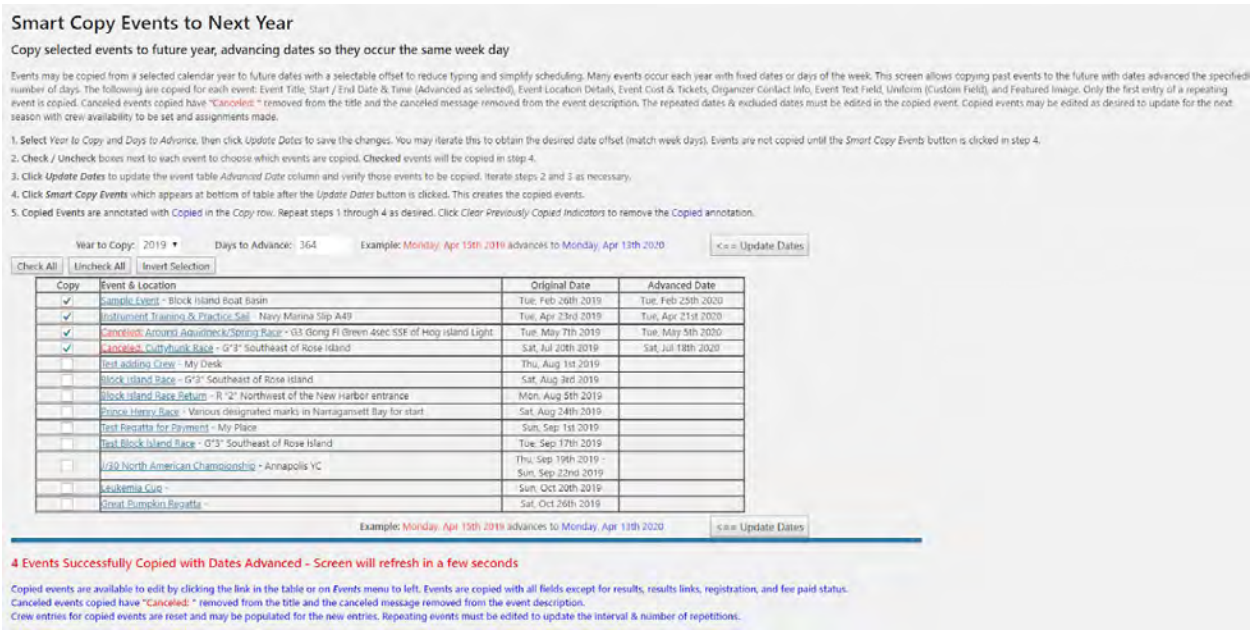
   The list is updated with those events excluded from copy having a blank in the *Advanced Date* column. A blue *Smart Copy Events* button appears at the bottom. Do not click this button until the events are listed for copy as desired. Steps 3 and 4 may be iterated as necessary to make corrections before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



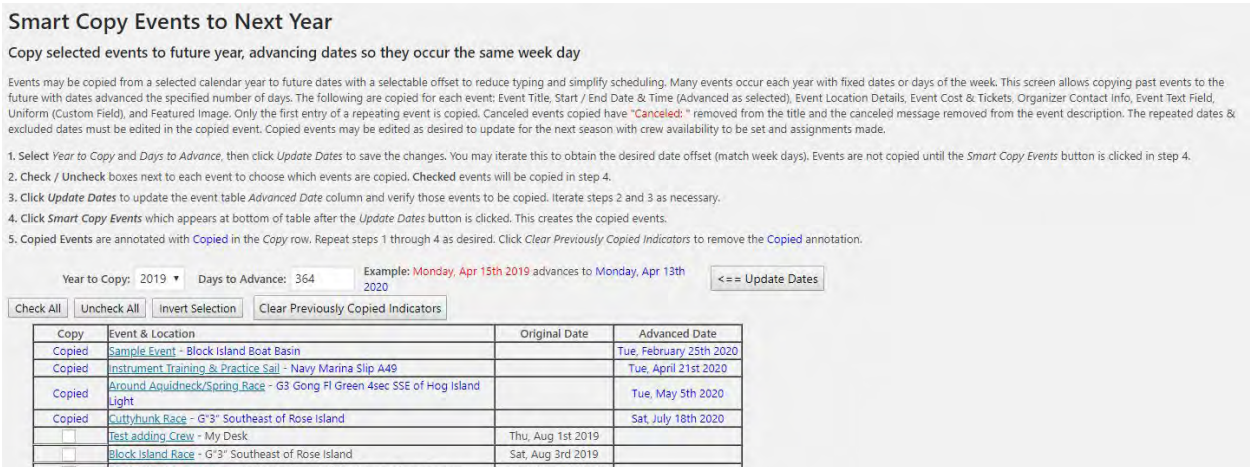
5. When the list of events to be copied and advanced is as desired, click the blue *Smart Copy Events* button once. The events will be copied and display a message showing the results, and the *Smart Copy Events* button is removed to prevent an inadvertent copy action. (See picture that follows this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



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.



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

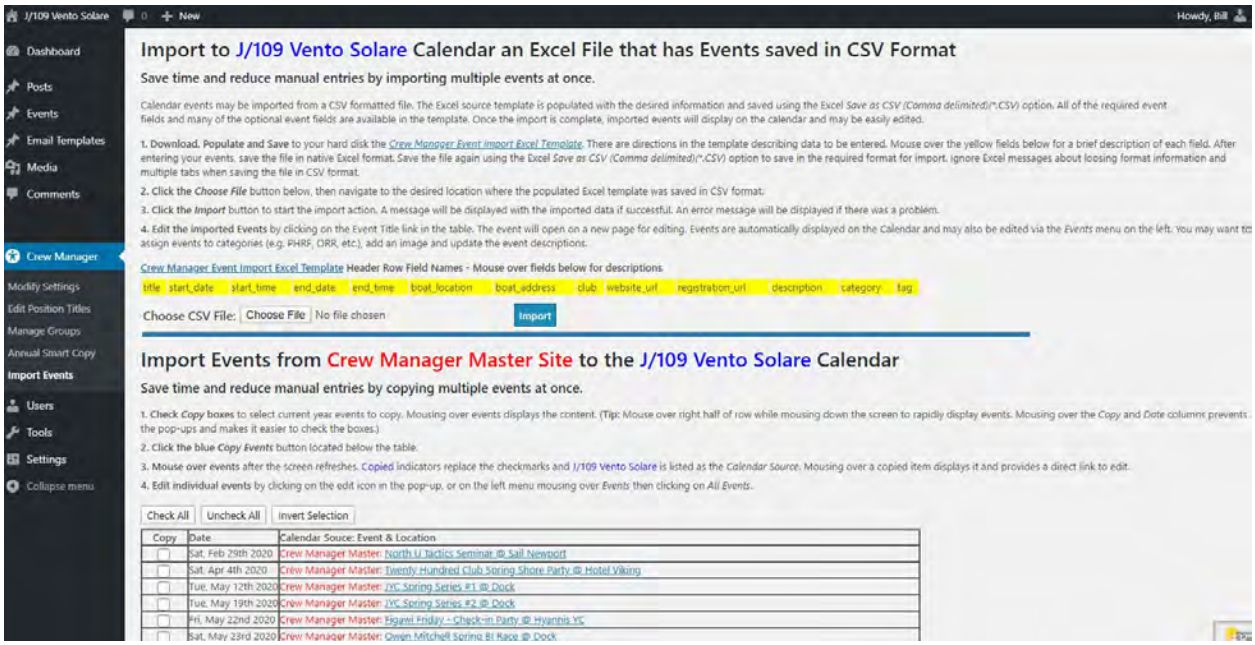
In summary - AI1EC calendar entry reminders scheduled by Crew Manager are sent automatically and will include all this information sent to crew members. Take the time to provide as much information possible so the Skipper doesn't get last minute phone calls!

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

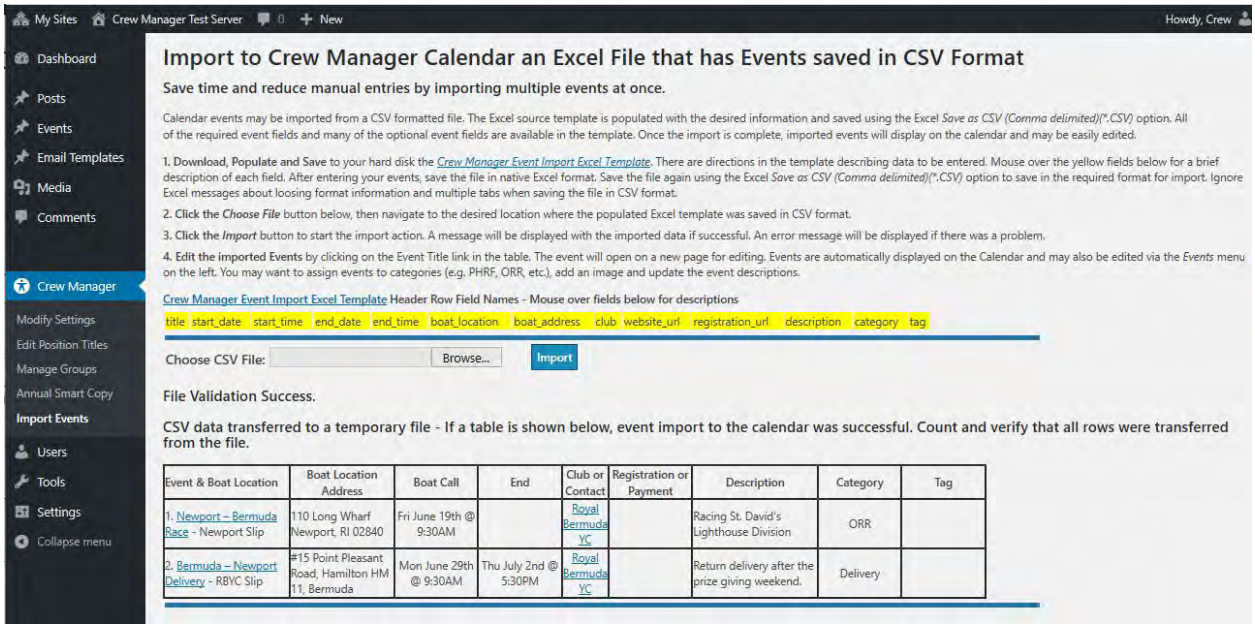
are available in the template. Once the import is complete, imported events will display on the calendar and may be easily edited.

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.



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

8. 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.

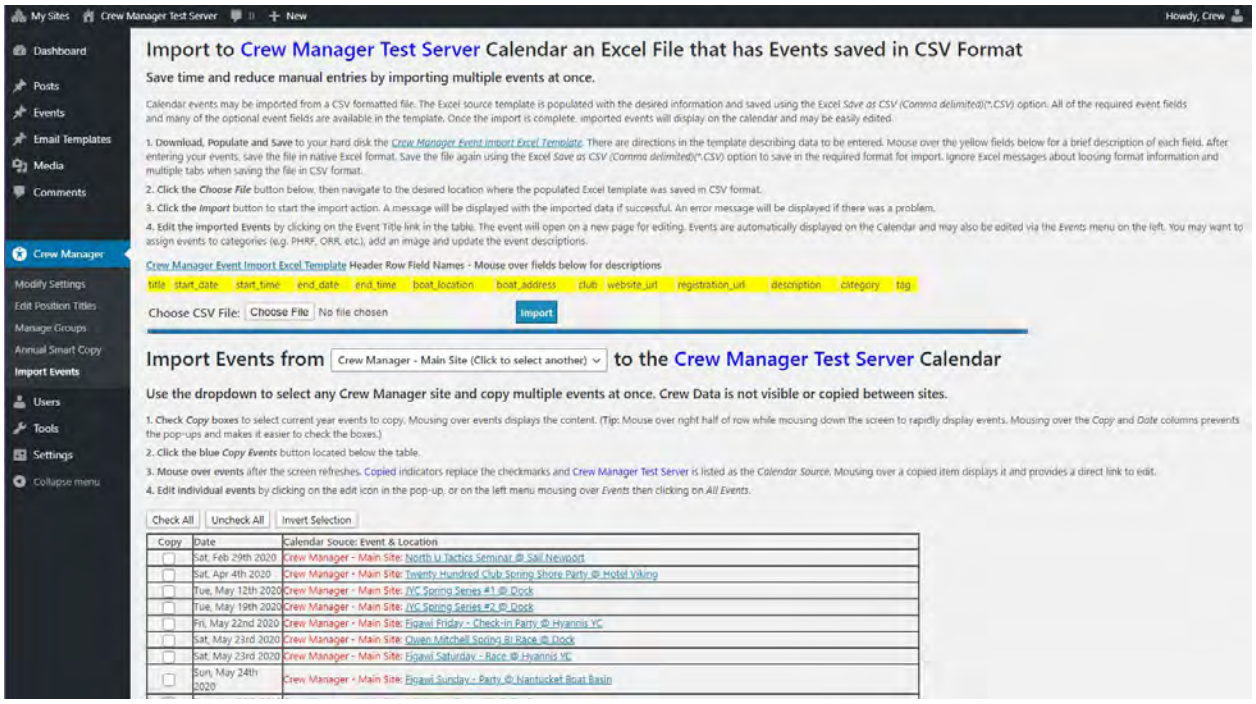


9. Edit the imported Events by clicking on the Event Title link in the table. The event will open on a new page for editing. Events are automatically displayed on the Calendar and may also be edited via the *Events* menu on the left. You may want to assign events to categories (e.g. PHRF, ORR, etc.),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

1. Log in as Skipper on the website where events are to be imported
2. Mouse over *Skipper* on the menu and click on *WordPress Admin*
3. On the left side WordPress Admin menu, mouse over *Crew Manager* and click on *Import Events*
4. 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.



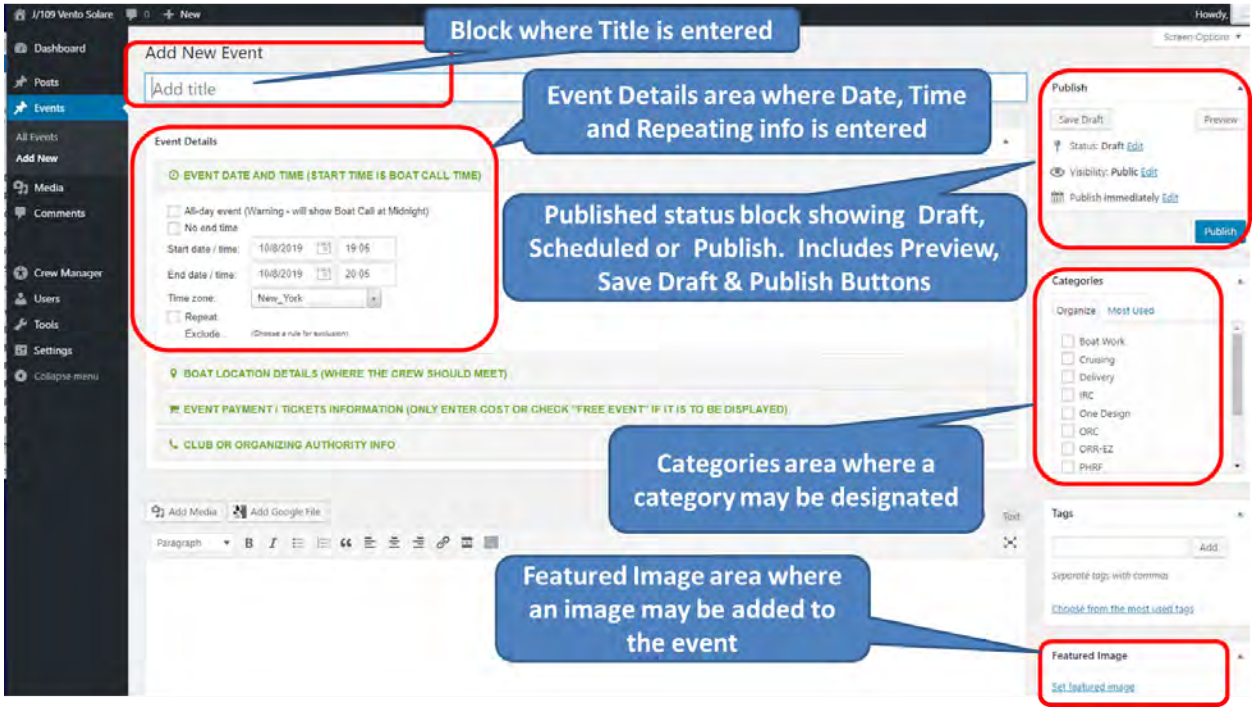
5. Check *Copy* boxes to select current year events to copy. Mousing over events displays the content. (**Tip**: Mouse over right half of row while mousing down the screen to rapidly display events. Mousing over the Copy and Date columns prevents the pop-ups and makes it easier to check the boxes.)
6. 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

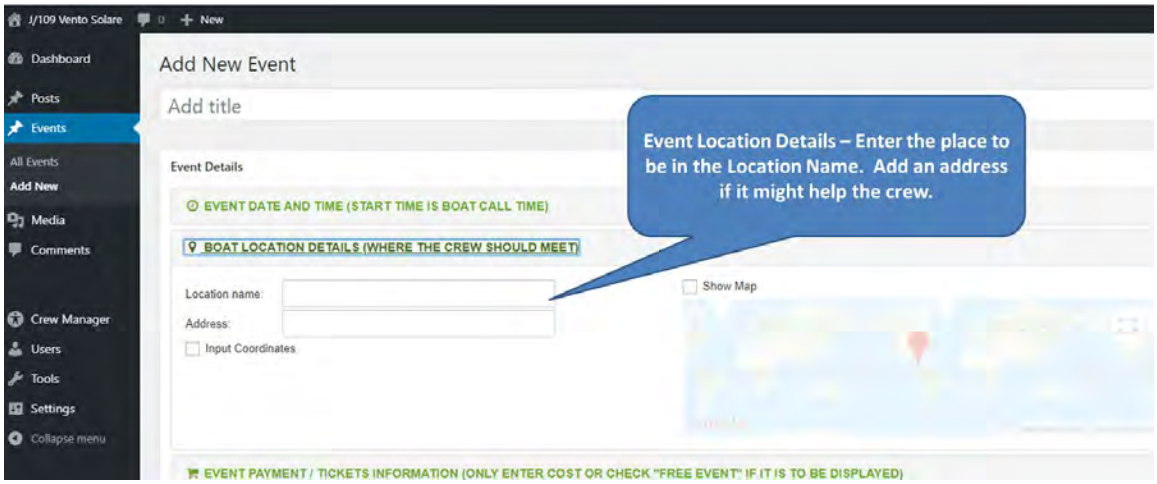
Assuming you are already logged in as the Skipper, do the following to create a new calendar event. In the example below, sample text is used to illustrate an entry.

Skipper Directions for Crew Manager

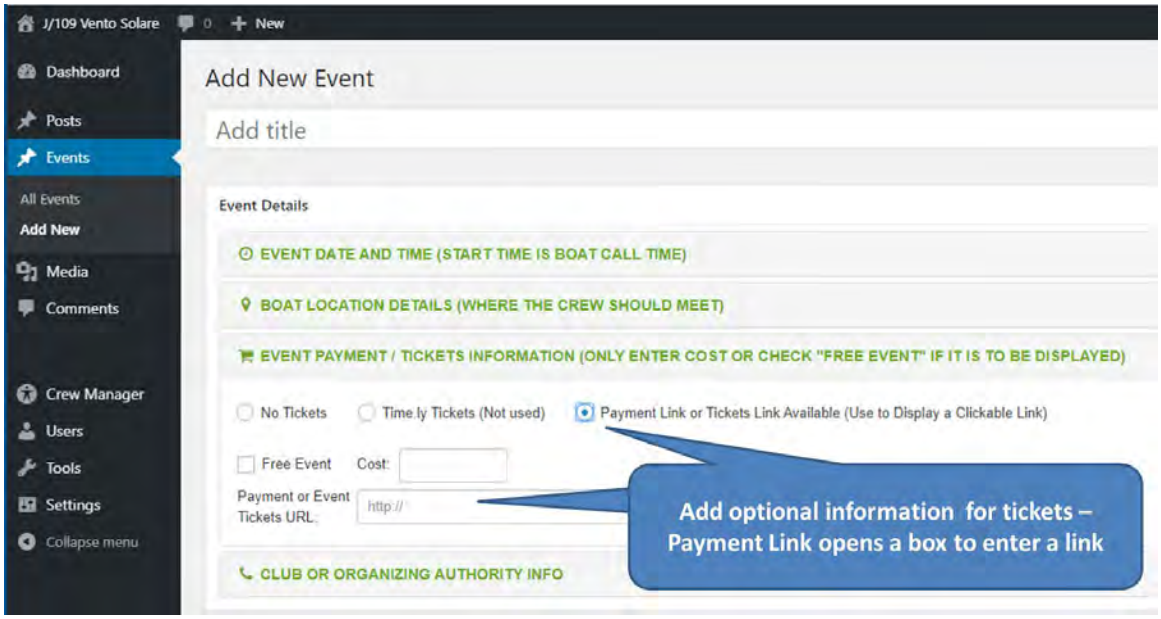
1. On the left side menu, mouse over *Events* and click *Add New*. The Add New Event page opens.



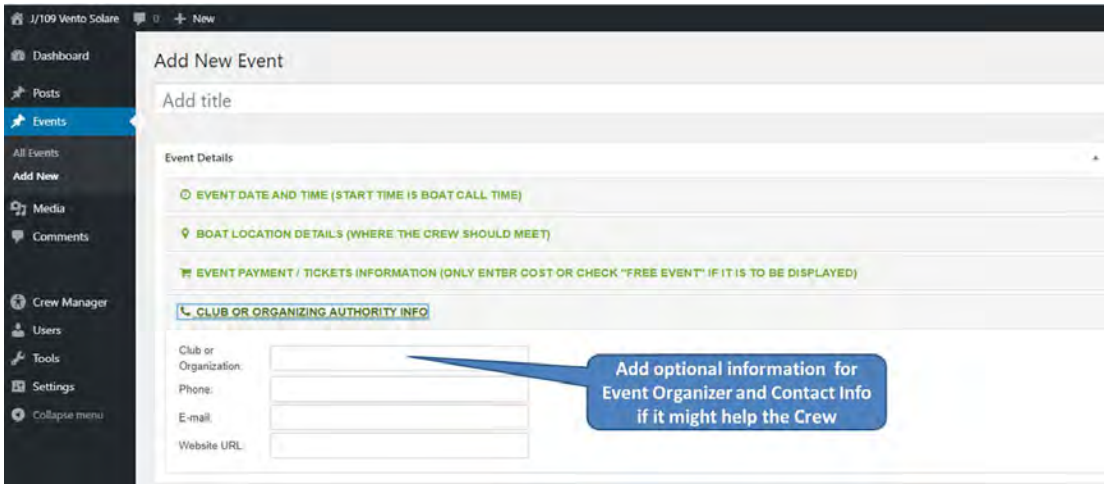
2. *Enter Title Here*: JYC Spring Race #1
3. *Event Date and Time*: Click date chooser and select May 8, 2018 and the time 5:15pm (time to be at the boat)
4. *Event Date and Time*: Check *No end time* or use the date chooser to select a day and time.
5. *Boat Location Details*: *Navy Marina* in Location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



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.

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 URLin 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.

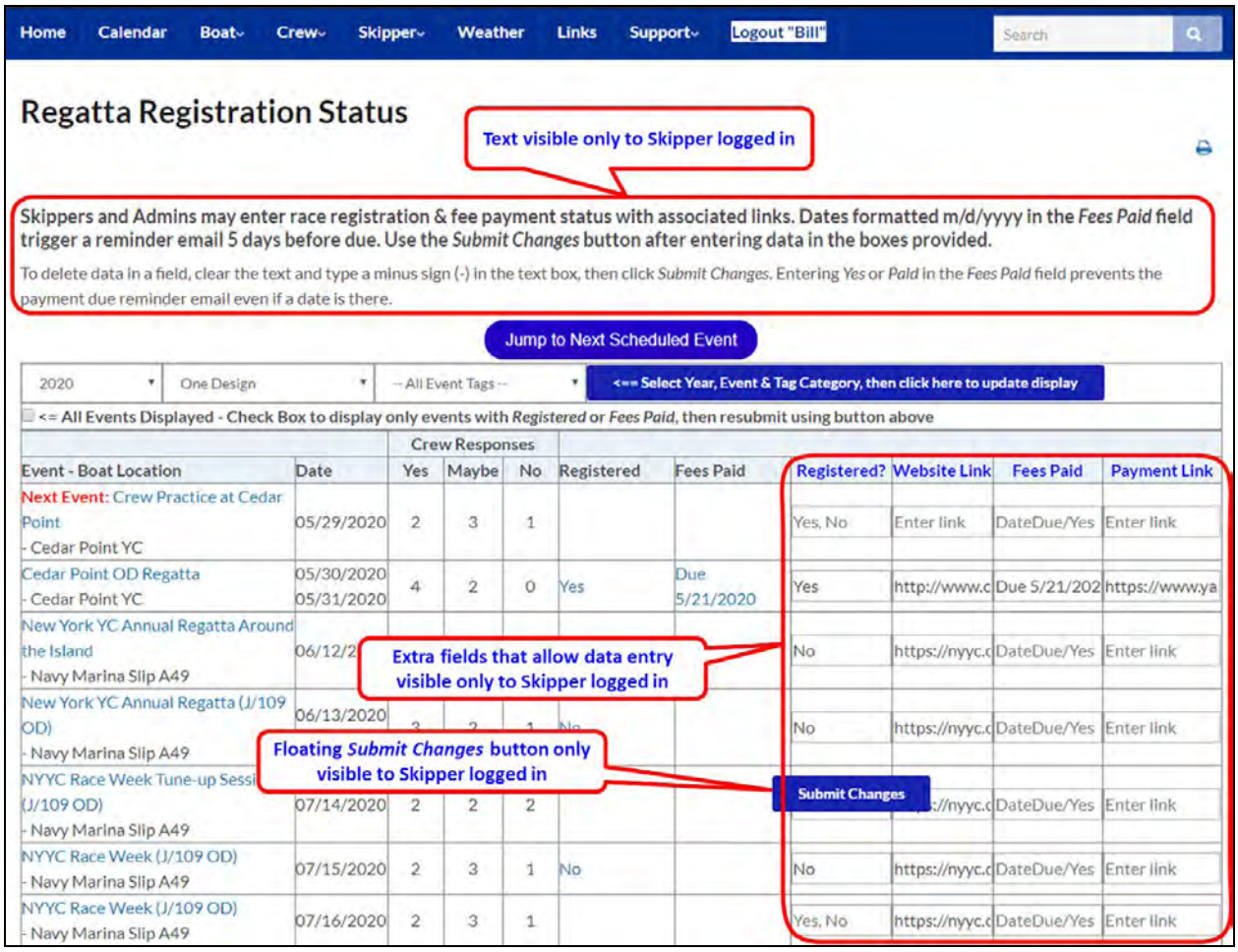
Tracking Registration & Fee Payment Status

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:

- 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. It 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



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.

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

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 seperate 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, the click the blue *Update* button. If the only change is the Crew for that day, just click the blue *Update* button and the event will be split from the repeating series allowing different Crew for that day.

8. Close that editing window once it has saved and repeat steps 6 and 7 until you have edited all the desired events.

Some Handy Tips for Events:

- When entering a series (e.g. JYC Spring Series) make the first entry with the label JYC Spring #1. In the date chooser, once the start date and time are entered, check the *Repeat* box and setup "repeats every week", then set the number of occurrences or the end date. Save as draft, then you may edit each week and fill in the race number (JYC Spring #2, JYC Spring #3, etc.).
- Copying a previous event using *Clone to Draft* makes it easy to create a new entry without having to type the details. The date may be modified, and the title changed. If results are recorded on the event being copied. 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.

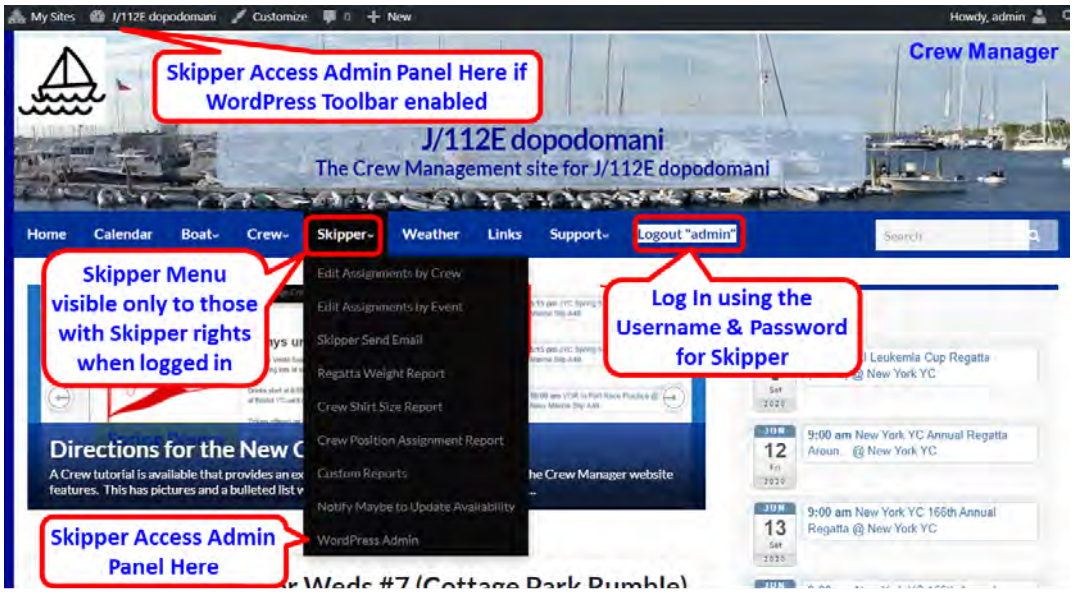
Skipper sets "Availability", "Position" & "Assignments" for events

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*.

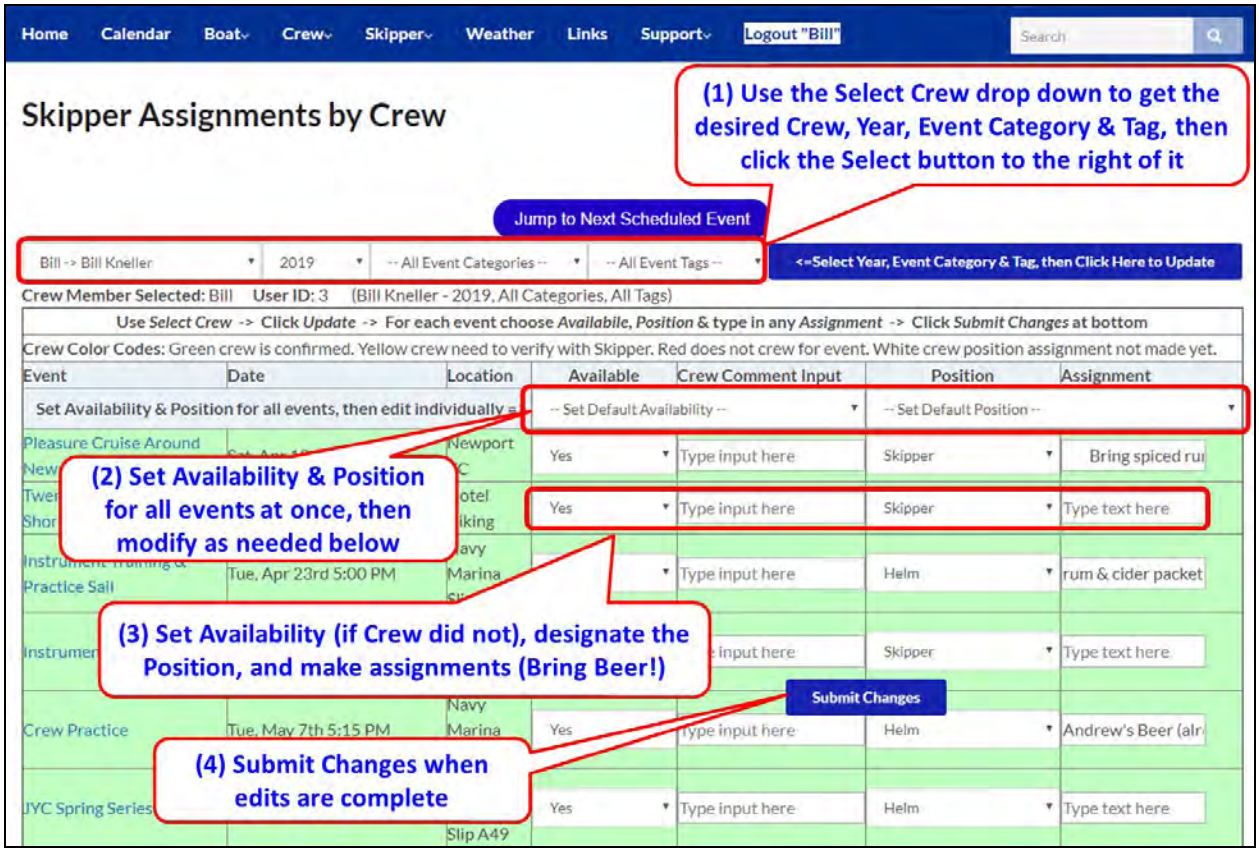
The Skipper may also set availability for any crew member as follows:
Assuming you are already logged in as the Skipper, do the following to set availability, positions and assignments for any Crew.

Skipper Directions for Crew Manager

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



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



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

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

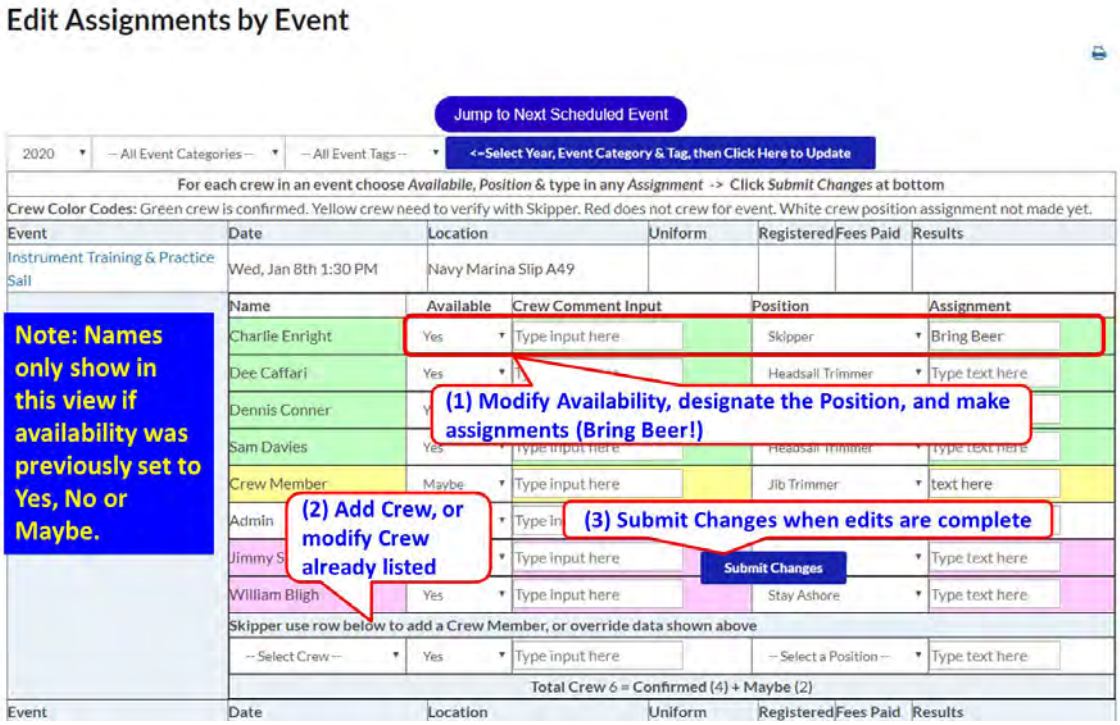
Alternate Method for Skipper Setting Availability, Positions & Assignments

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*

Here to Update button next to the year. The entire season is displayed by event.



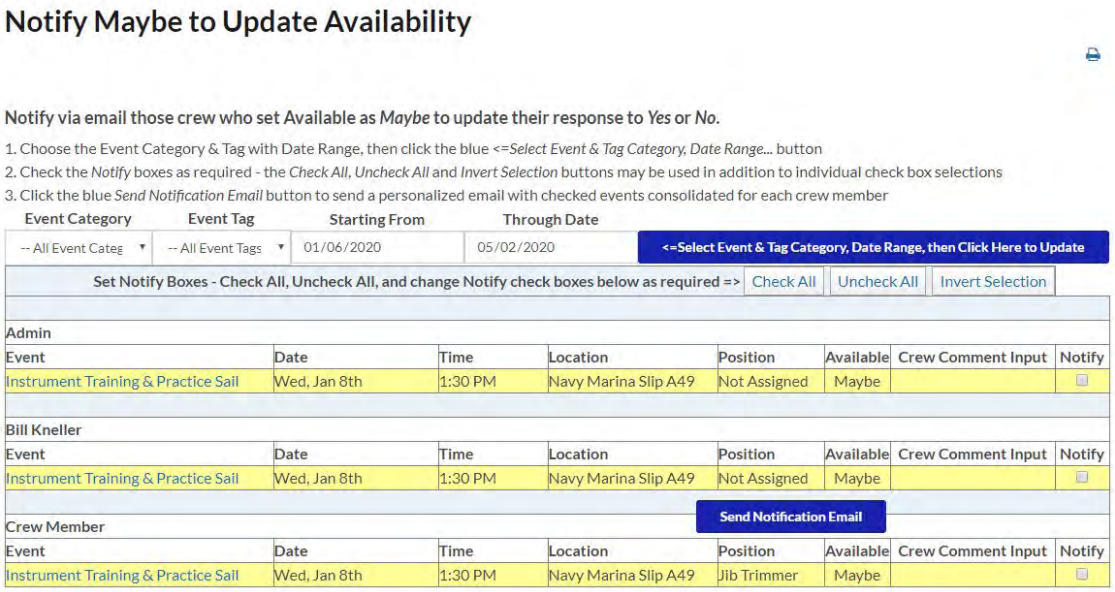
3. You may change the Crew members availability to Yes, No or Maybe for any event (only if Availability was previously set for an event)
4. You may designate a Crew position using the position drop down for any event.
5. You may assign the Crew member a task in the text box such as “Bring Beer”
6. Click 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

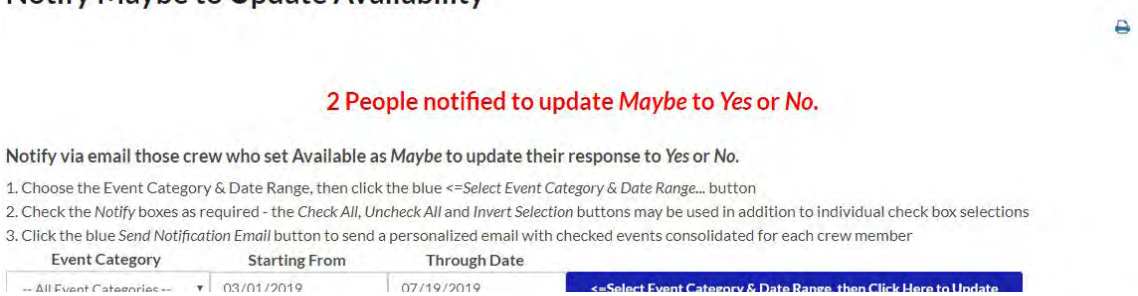
Crew members may initially set their availability to *Maybe* for some events. As the season progresses the Skipper may want firm commitments so that other people may fill vacant spots and crew positions assigned. The menu item *Notify Maybe to Update Availability* is on the Skipper menu to identify individuals 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*

Range button is clicked. The screen will refresh with the updated selections.



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..



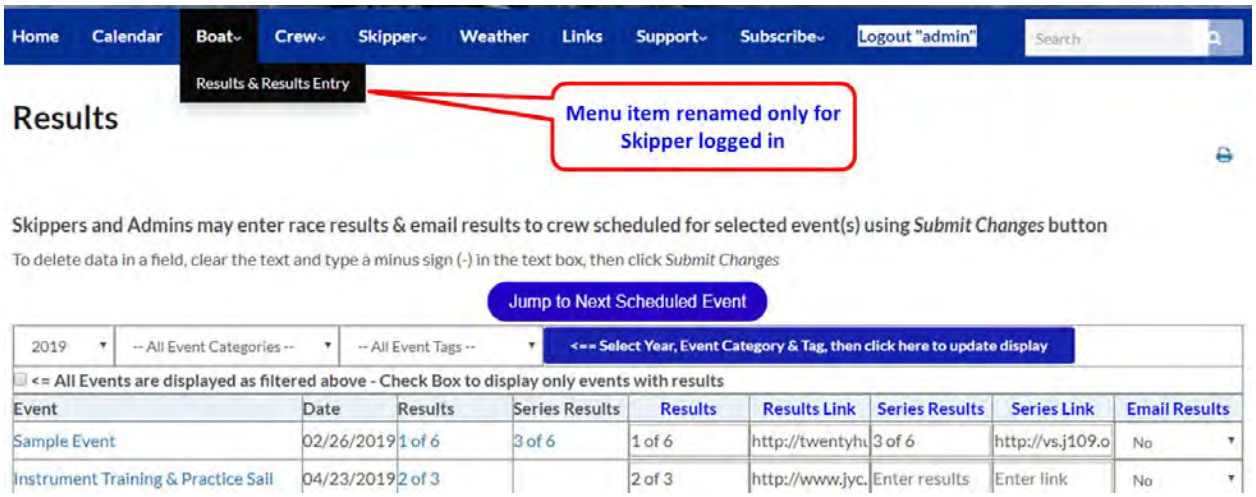
Recording Race Results

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

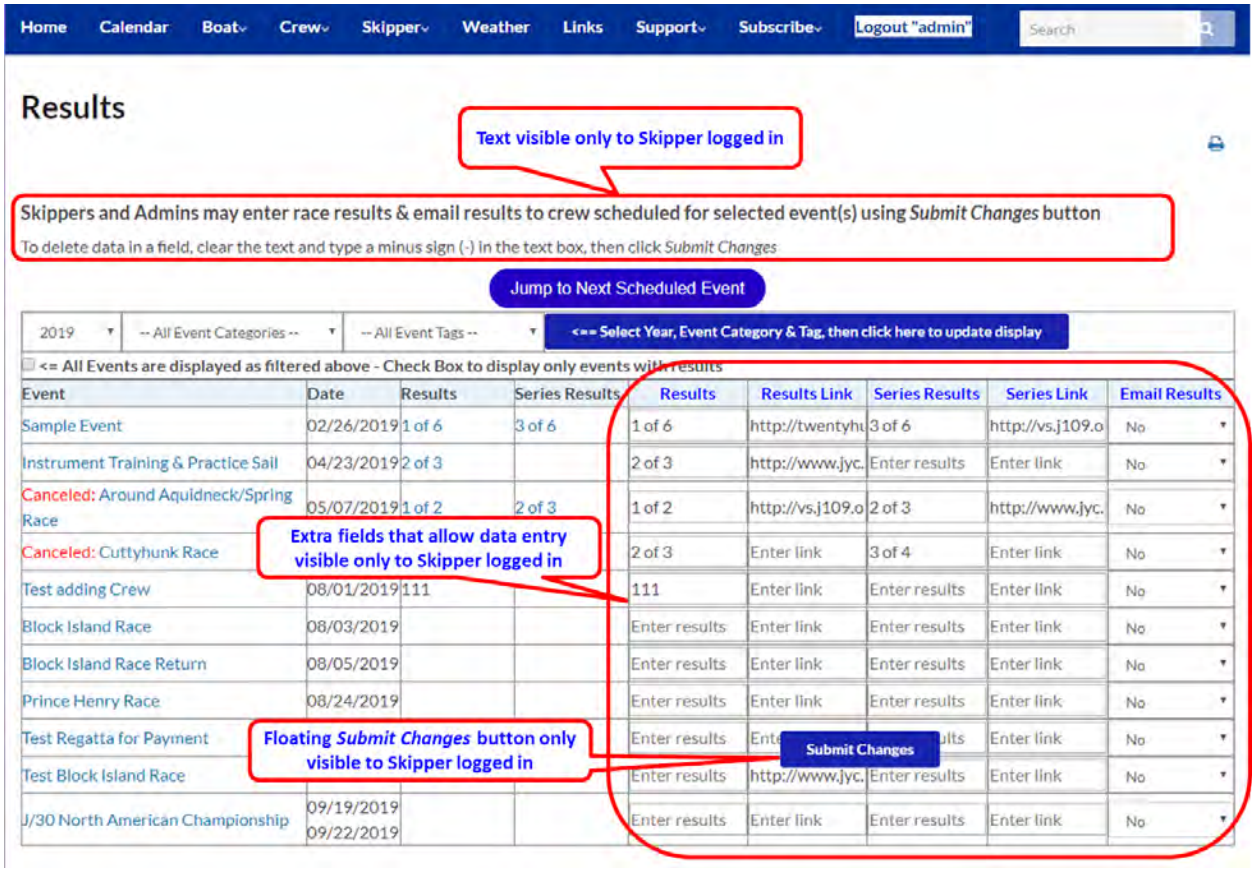
Using the Race Results Page to Record Results

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

Skipper Directions for Crew Manager



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



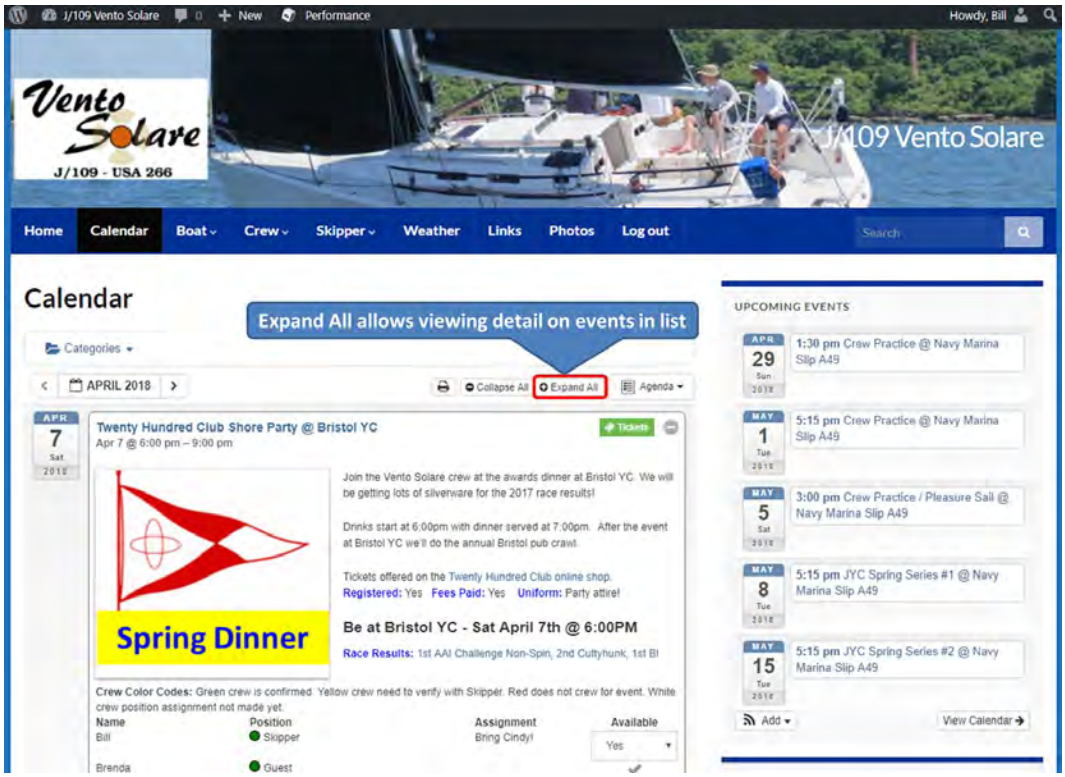
3. The report detects a Skipper logged in and adds columns to the right for *Results*, *Results Link*, *Series Results*, *Series Results Link*, and *Email Results* with fields in these columns the Skipper may type in the associated results and a check box to email results
4. A floating Submit button 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

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

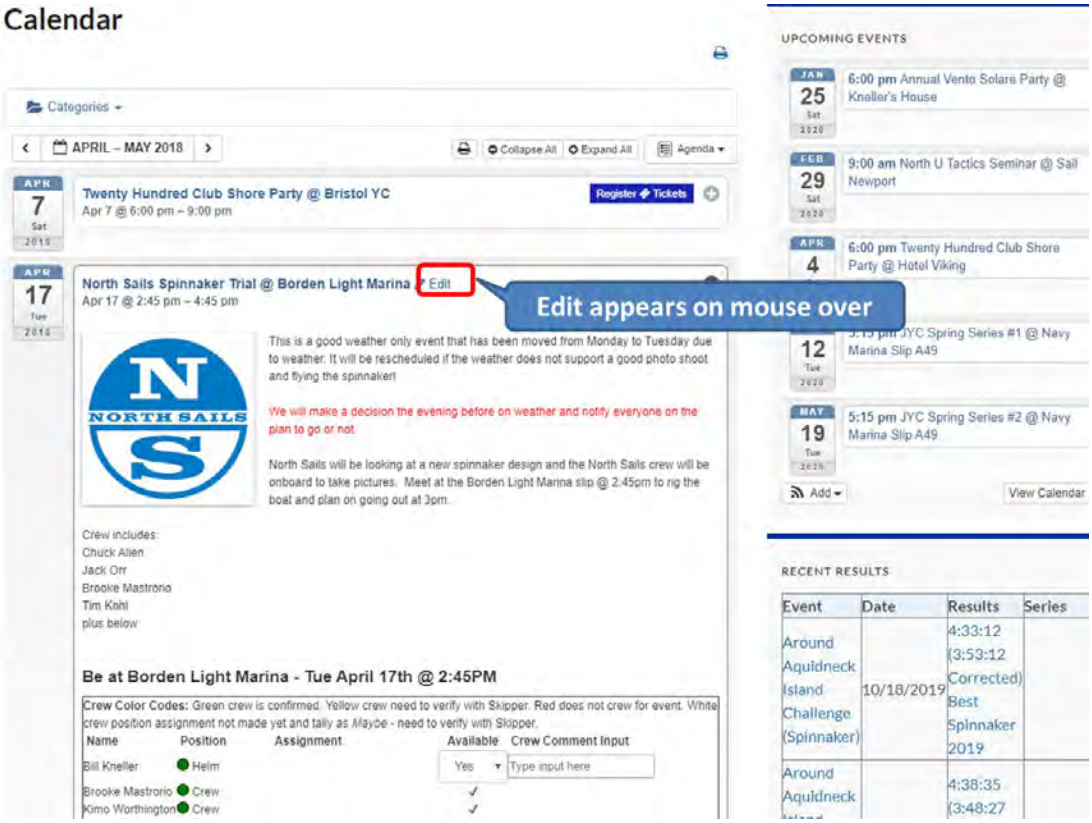
Assuming you are already logged in as the Skipper, do the following to edit an existing calendar event. In the example below, sample text is used to illustrate an entry.

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

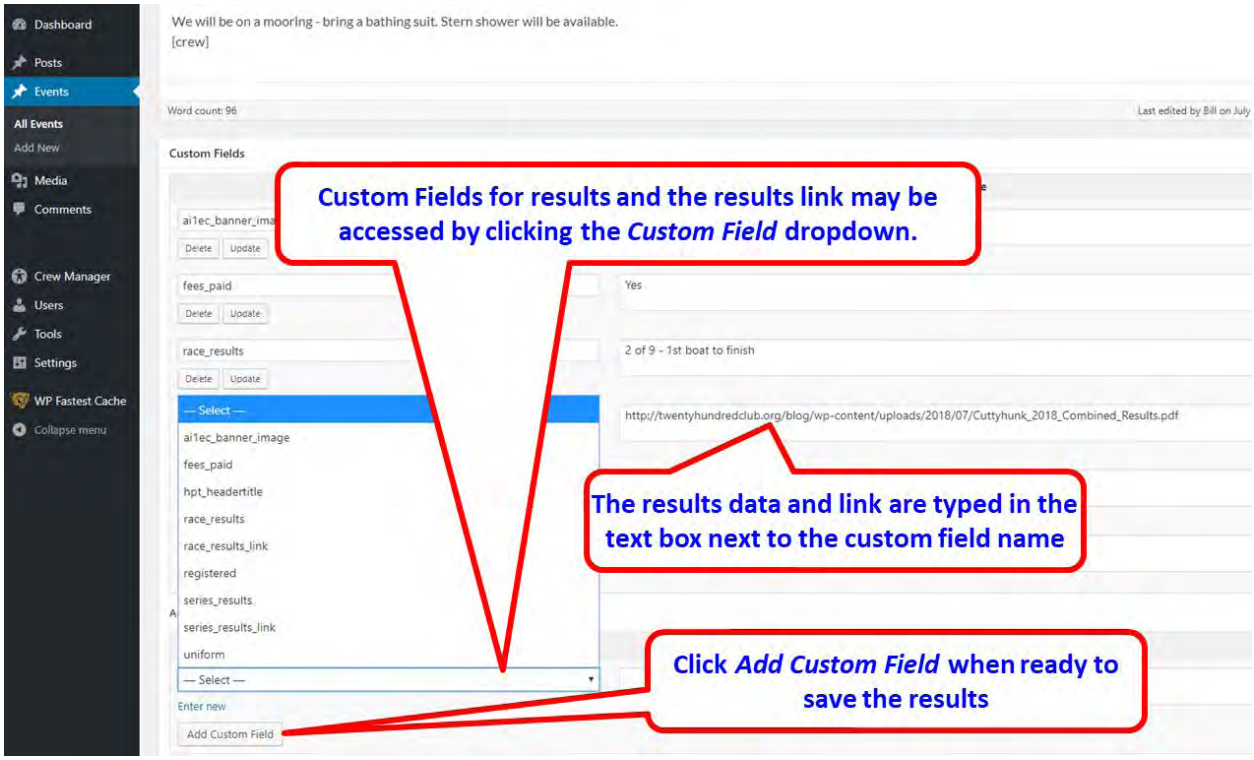


Skipper Directions for Crew Manager

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



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



5. *Custom Fields*: Click the arrow on the *Select* dropdown, then click *race_results*. In the *Value* field type results (e.g. 1st, 3 of 8, etc.), then click the *Add Custom Field* button. If there is a link to the results on the web, repeat the procedure and select the custom field *race_results_link*. The full link is typed (or pasted) into the *Value* field. The *race_results_link* may be preloaded with a url to the results, but will not display until the *race_results* field is populated.
6. If there are series results, the same procedure is used using the custom field names *series_results* and *series_results_link*. The *series_results_link* may be preloaded with a url to the results, but will not display until the *series_results* field is populated.
7. Changes for custom fields are automatically saved when the *Add Custom Field* button is clicked. There is no need to click the blue *Update* button.

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

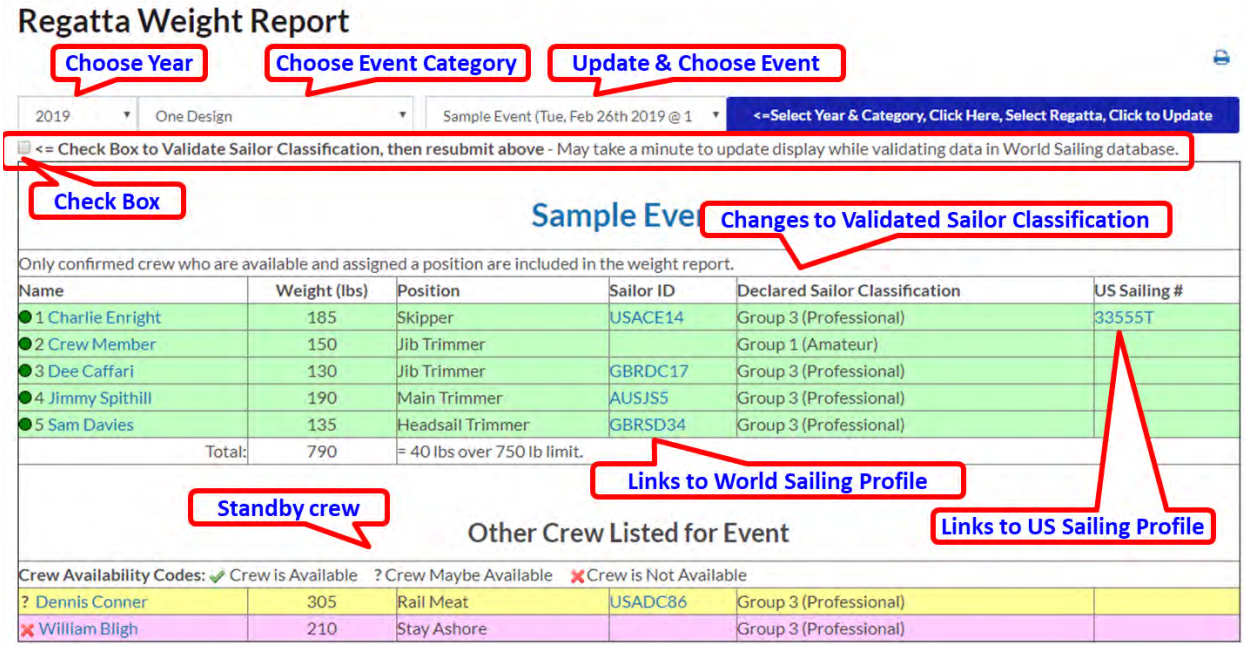
Regatta Weight Reports

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

blue *Select Year & Category ...* button. It may take a couple of minutes for the World Sailing database to return the results.



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 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.

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- 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.

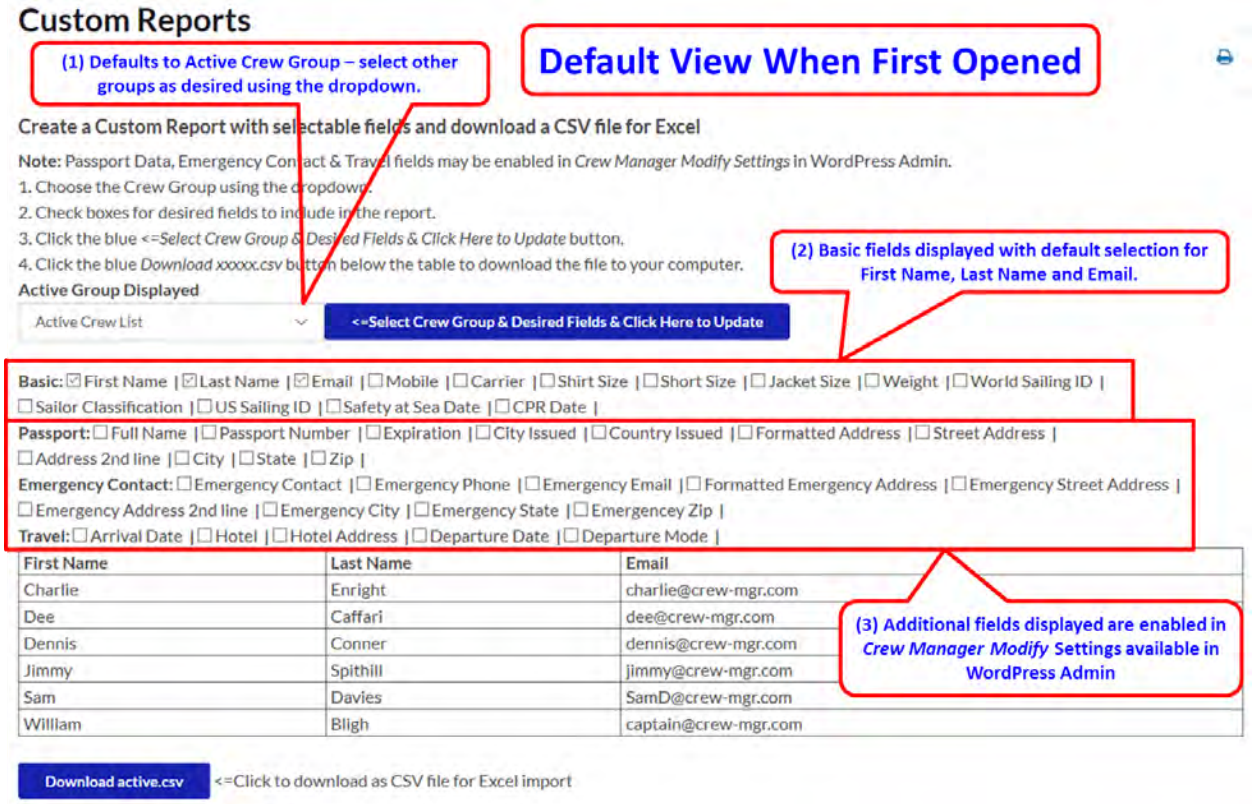
	Bill	Charlie	Dee	Dennis	samd	Skipper	admin	Bill is Testing	Crew	Jimmy
Cook									1	
Crew	1								1	1
Foredeck										1
Guest			1							
Headsail Trimmer					1					
Jib Trimmer			1						1	
Main Trimmer										1
Mast		1					1			
Navigator					1			1		
Pit				1					2	
Rail Meat	1			1			1			1
Skipper	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

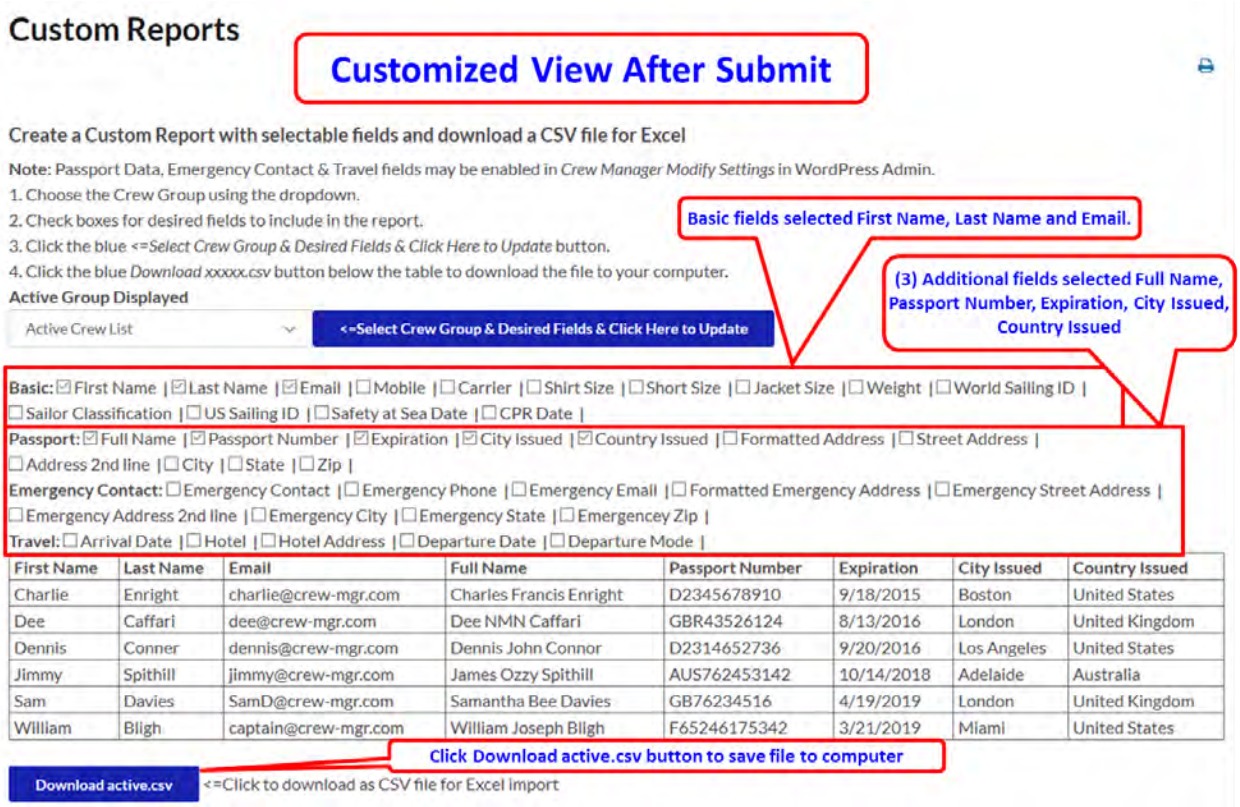
Crew Manager can produce custom reports for a selected group using any of the fields available in a user's profile. This includes additional fields the Skipper may enable for Passport Information, Emergency Contact and Travel information. Typically this information is required for international distance 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



- 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



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:

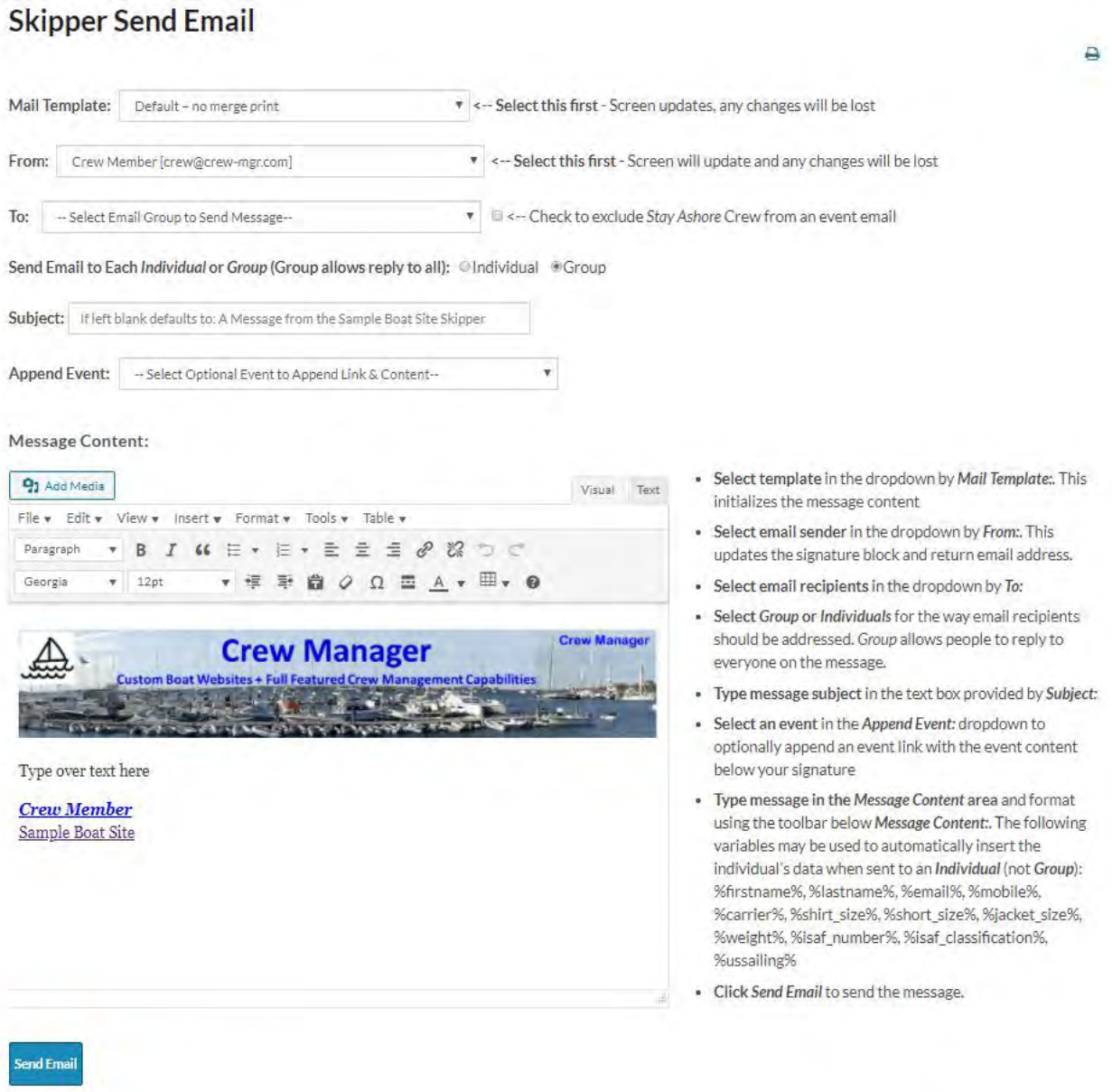
- Email templates are selectable from a dropdown for personalized “Merge Print” messages and a general message to a group. These may be edited by the Skipper, and new templates created.
- The Skipper or Crew Administrator may select who the message is from using a dropdown that contains only Crew Administrators 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.

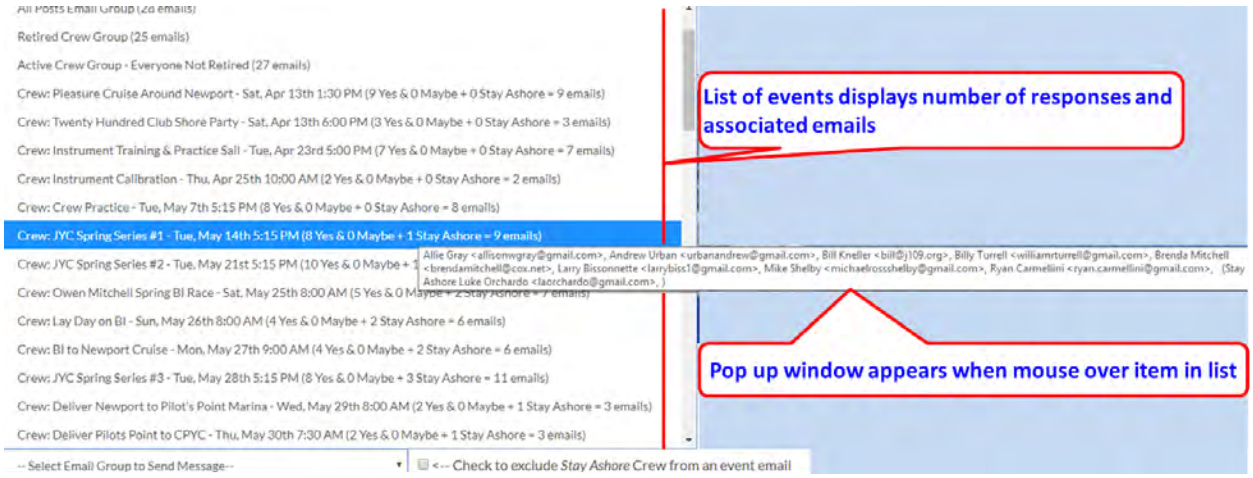
1. Mouse over Crew Manager on the left menu and click on *Skipper Send Email*



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

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.

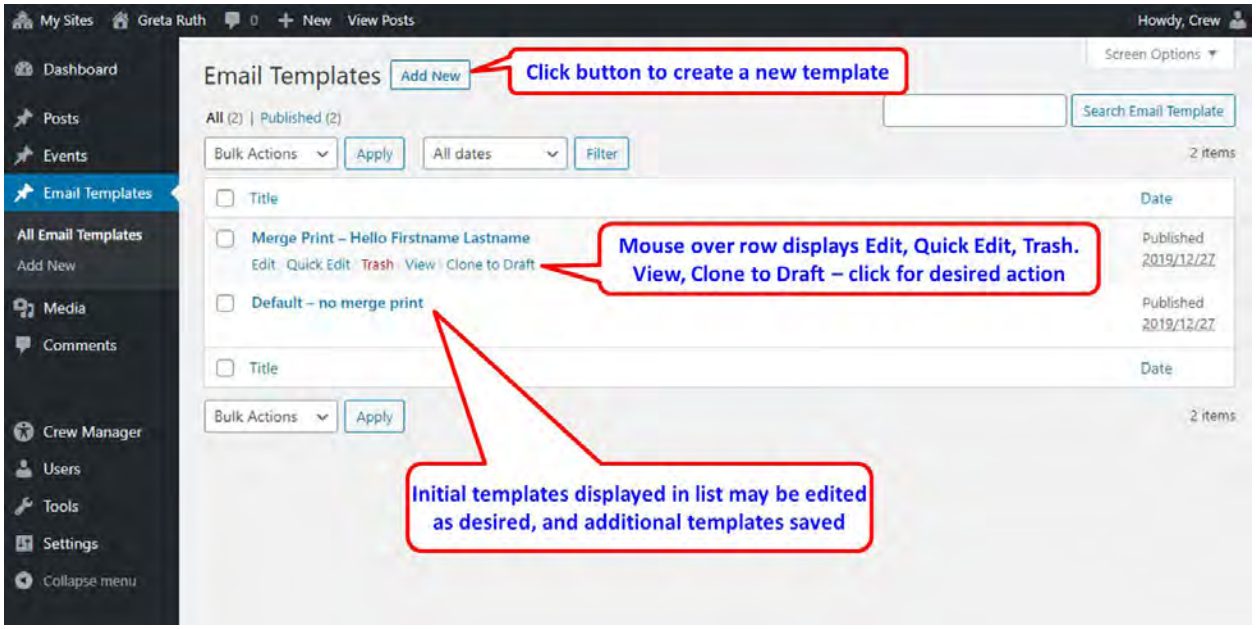
A summary message is displayed on the screen showing the results of sending the email.

Skipper Directions for Crew Manager

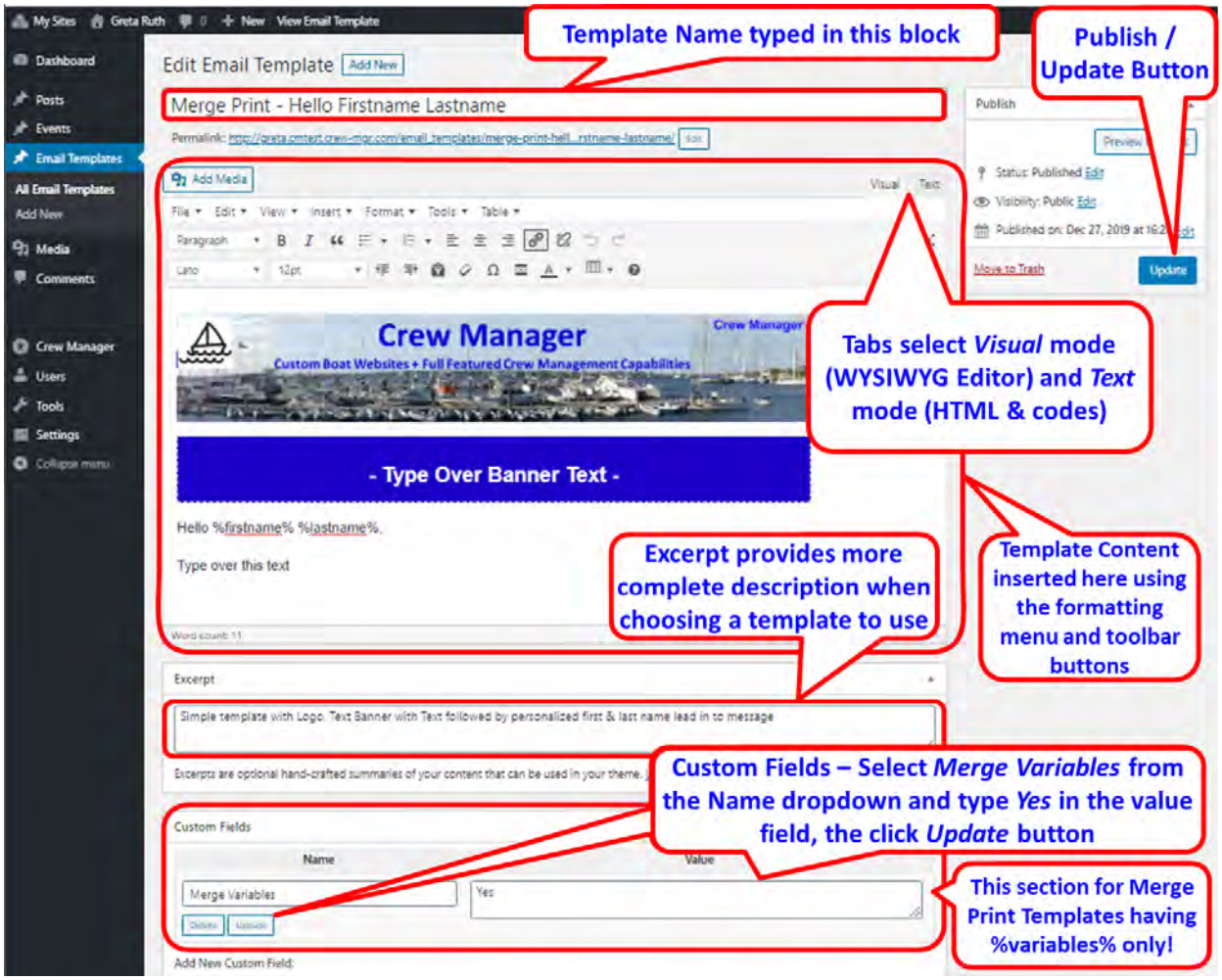
Create or Edit Email Templates

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.



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.

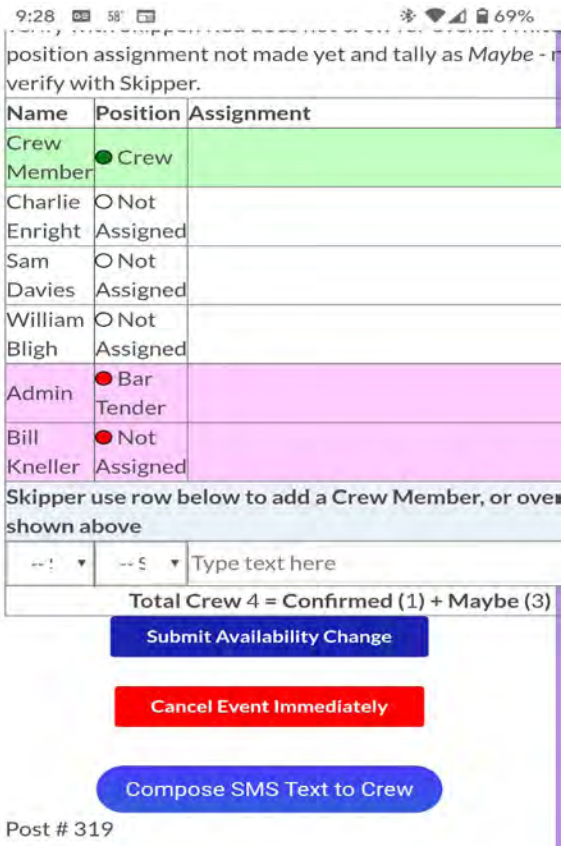


5. The template may contain text and graphics. For merge print the following variables are used so that the information stored in a user's profiles is inserted in place of the variable:%firstname%, %lastname%, %email%, %mobile%, %carrier%, %shirt_size%, %short_size%, %jacket_size%, %weight%, %isaf_number%, %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.

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



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.

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 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

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.