Crew Manager

Crew Manual

Version 2.0
30 December 2018

http://crew-mgr.com

Version	Date	Comment
2.0	12/30/2018	WordPress Multisite update with subscriptions and new features
1.2	5/10/2018	Updated to include login button inside multiple events in a list
1.1	4/27/2018	Updated to include login from button inside event
1.0	4/20/2018	Originally published

Crew Directions for Crew Manager

Summary

The team website has features crew members will use throughout the sailing season. In a nutshell, the team website provides a "Who, What, When, Where and Wear" schedule with automatic reminders. After an event, the results may be posted and crew members may submit comments, pictures and stories about the event.

- Provides a calendar of events for the boat and crew. Additional pages contain links of interest, weather and winds
- Events include boat location and time to be there and may specify "Uniform" (e.g. orange shirts). It also may include the boat registration and fee payment status for an event.
- Crew members set their availability to participate - this is displayed on the events
- The Skipper designates boat positions for available crew members and makes assignments by crew member (e.g. bring beer) - all these are displayed on the event
- Additional information may be included such as weather forecast, tides & currents, links to race documents, etc.
- Crew members receive a reminder email 36 hours (or time as as set by the Skipper) prior to events for which they are scheduled - all the event information is included
- Crew members may view a roster with contact information for all crew members. This is only visible to crew members logged in.

Quick Tips (Refer to pictures at end)

Crew Members must have an account set up by the Skipper before being able to log in. Once an account is established, the Skipper will trigger an email with a message for the Crew Member to set their password.

View my entire season to display all events, my availability, crew position and assignments
- *Log in* on menu (it will display *Logout* if already logged in)
- Click down arrow on *Crew* then click *Availability*
- The current year season is displayed by event. To select a different year, click the dropdown, then click the *Select Year* button.
- **You may change your availability** to Yes, No or Maybe for any event and may set multiple events before submitting
- Click floating blue button labeled *Submit Changes*
- The screen refreshes and the Skipper is notified automatically with any changes made

View an upcoming calendar event
- On the right column see *Upcoming events* where the next 5 events are displayed
- Mouse over the text for an event and a pop up summary is displayed
- Click on the text to open the event and display the details
- **You may change your availability** if you are logged in to Yes, No or Maybe
- Scroll to bottom and click blue button labeled *Submit Availability Change*
- The screen refreshes and the Skipper is notified automatically with any changes made

View a series of calendar events
- Click *Calendar* on the menu

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- Click on the **+** symbol to expand a particular event and see the details, then click *Read More* if you want to see additional information
- Click *Expand All* to expand all the events
- **You may change your availability** for a particular event if you have already set it and are logged in. This may be set to Yes, No or Maybe
- If you are logged in go to the next step, otherwise click the blue button labeled *Login to Update Availability* **-** you will then log in and be redirected back to the event
- Click the blue button in the event labeled *Submit Availability Change*
- The screen refreshes and the Skipper is notified automatically with any changes made

View only One Design (PHRF, Social, etc.) events if Skipper categorized the event
- Click *Calendar* on the menu
- Click the down arrow on *Categories* then click *ONE DESIGN*
- Repeat to add other categories
- Click the **X** next to *Categories* to clear selections and display all

Search for a calendar event
- In the *Search* box upper right type the desired search ter, (e.g. Block Island) then click the magnifying glass or press enter
- A list of items is displayed - Click on the desired event

Change Availability for an event may be done via multiple methods - you must be logged in
- **Crew Menu** - On menu, click down arrow on *Crew* then click *Availability*
- The current year season is displayed by event. To select a different year, click the dropdown, then click the *Select Year* button.
- Entire season is displayed by event
- You may change your availability to Yes, No or Maybe for any event
- Click the floating blue button labeled *Submit Changes*
- The screen refreshes and the Skipper is notified automatically with any changes made
- **An Individual Event -** Click on the text to open the event and display the details
- You may change your availability to Yes, No or Maybe
- Scroll to bottom and click blue button labeled *Submit Availability Change*
- The screen refreshes and the Skipper is notified automatically with any changes made

View Assignments and Change Availability for an event - you must be logged in
- **Crew Menu** - On menu, click down arrow on *Crew* then click *Assignments*
- The current year season is displayed by event. To select a different year, click the dropdown, then click the *Select Year* button.
- Entire season is displayed by event with a list of all crew and positions assigned
- You may change your availability to Yes, No or Maybe for any event
- Click the floating blue button labeled *Submit Changes*
- The screen refreshes and the Skipper is notified automatically with any changes made
- **An Individual Event -** Click on the text to open the event and display the details
- You may change your availability to Yes, No or Maybe
- Scroll to bottom and click blue button labeled *Submit Availability Change*
- The screen refreshes and the Skipper is notified automatically with any changes made

View Crew Roster - you must be logged in
- **Crew Menu** - On menu, click down arrow on *Crew* then click *Roster*
- A list of the entire crew is displayed by name with email address and mobile phone

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- You may view various group lists by clicking the dropdown, then clicking *Select Group*
- Each email address is a link
- Next to your name is a *(click to edit)* link that allows editing information in your profile

Edit my Profile- you must be logged in

- **Crew Menu** - On menu, click down arrow on *Crew* then click *Edit my Profile*
- A page with fields that contain information for your profile is displayed. All fields may be updated except for Username.
- The following fields are available to update: First Name, Last Name, Nickname, Display name publicly as (dropdown), Email, Password, Mobile Phone, Mobile Phone Carrier (dropdown), Receive SMS message check box (not active yet), Shirt Size & Jacket Size dropdowns, Weight in Lbs., World Sailing Sailor ID, World Sailing Classification (dropdown), US Sailing Membership Number, Opt out of *All Posts* emails (checkbox)
- When updates are complete, click on the *Update Profile* button
- Return to the boat website by mousing over the house icon located top left with the boat name, then click on *Visit Site*
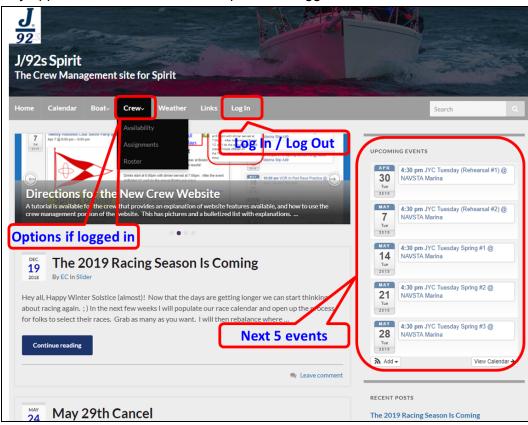
View Results - you do not need to log in

- **Boat Menu** - On menu, click down arrow on *Boat* then click *Results*
- The current year results are displayed by event. To select a different year, click the dropdown, then click the *Select Year* button.
- If the Skipper entered results for an event, it will be listed and if the Skipper included a link to the results, clicking on a result opens a new page with specific event results.
- The event name is a link to the calendar entry where the results are also displayed.

Website Pictures with Examples

Log in / Logout and Crew options on Menu

Display showing Log in / Logout and Crew options on menu. Note that you may also login using the Log in button displayed inside any event. Log out is only available on the menu. Edit my Profile only appears in the Crew menu if a person is logged in.
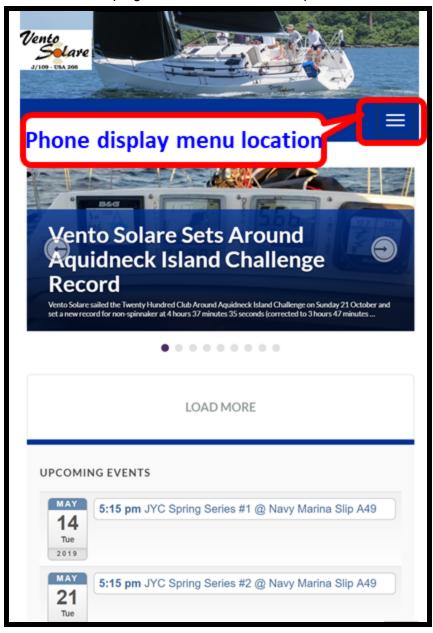

Logout displays the Login name when Crew Member is logged in. *Edit my Profile* is also shown on the Crew menu when logged in.

Phone Display Menu Location

The menu on phones and smaller displays automatically changes content so only the most important information is displayed. The display may be scrolled down to see more content. The menu appears as bars on the top right. Click on the bars to open the menu structure.
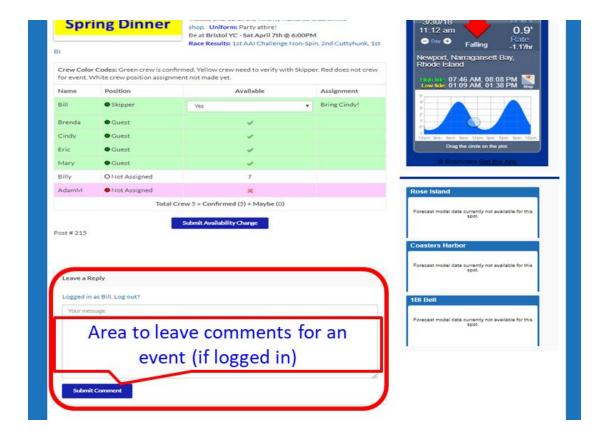
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Annotated Calendar Display - Shows items in Quick Tips

Submit comments & stories for an event when logged in

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View the entire season and set availability for each event

- Menu *Crew*, *Availability*
- If you have a long list of events, the *Jump to Next Scheduled Event* button scrolls to the next event scheduled based on the current date
- Once availability is modified for any events using the dropdowns, click the floating *Submit Changes* button

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View Assignments for the entire season

- Menu *Crew*, *Assignments*
- If you have a long list of events, the *Jump to Next Scheduled Event* button scrolls to the next event scheduled based on the current date
- Event details with Position & Assignments for all Crew members is displayed. Crew members may change their availability for any event on this screen.
- Once availability is modified for any events using the dropdowns, click the floating *Submit Changes* button