



Crew Manager

Custom Boat Websites + Full Featured Crew Management Capabilities

Crew Manager

Crew Manager Crew Manual

Version 2.5
26 August 2019

<http://crew-mgr.com>

Version	Date	Comment
2.5	8/26/2019	Added Crew Responses to Regatta Registration Status Report, Added Multiple boat calendar filtering
2.4	6/30/2019	Added Availability selection for entire column, added short size
2.3	5/5/2019	Updated various pictures, fixed typos
2.2	3/22/2019	Added Regatta Registration Status Report
2.1	2/23/2019	Updated with SMS Text Messaging added
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 and optional text message 36 hours (or time 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 all events all events at once using the *Set Default Availability* selector at the top of the column, then may edit individual 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
- Click the floating blue button labeled *Submit Changes*
- The screen refreshes and the Skipper is notified automatically with any changes made



Crew Directions for Crew Manager

View a series of calendar events

- Click *Calendar* on the menu
- 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 proceed 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

View a Single Boat if Skipper has Multiple Boats

- Click *Calendar* on the menu
- Click the down arrow on *Tags* then click *ONE DESIGN*
- Repeat to add Tags for other boats
- Click the **X** next to *Tags* 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. At the top of the *Availability* column is a selector that sets the same availability for all events. You may use this, then change selected events before the next step
- 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, and optionally select an event category such as *One Design* to filter using the dropdown, then click the *Select Year & Event Category* button.
- Entire season is displayed by event with a list of all crew and positions assigned



Crew Directions for Crew Manager

- 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
- Click the floating blue button labeled *Submit Changes*
- The screen refreshes and the Skipper is notified automatically with any changes made

View Regatta Registration Status - you must be logged in

- **Crew Menu** - On menu, click down arrow on *Crew* then click *Regatta Registration Status*
- A list of the events by calendar year that the Skipper has scheduled is displayed showing the number of Crew responses, registration status and fee payment status
- You may select a different year and filter for event types (e.g. PHRF, One Design) clicking the dropdown, then clicking *Select Event Year & Event Category*

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
- An option check box is available to see SMS text messaging addresses when a Crew member opts to receive Text Messages in their profile
- 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, Shirt, Jacket & Short 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, scroll to the bottom and click 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, or category, click the dropdowns, then click the *Select Year & Event Category* 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.

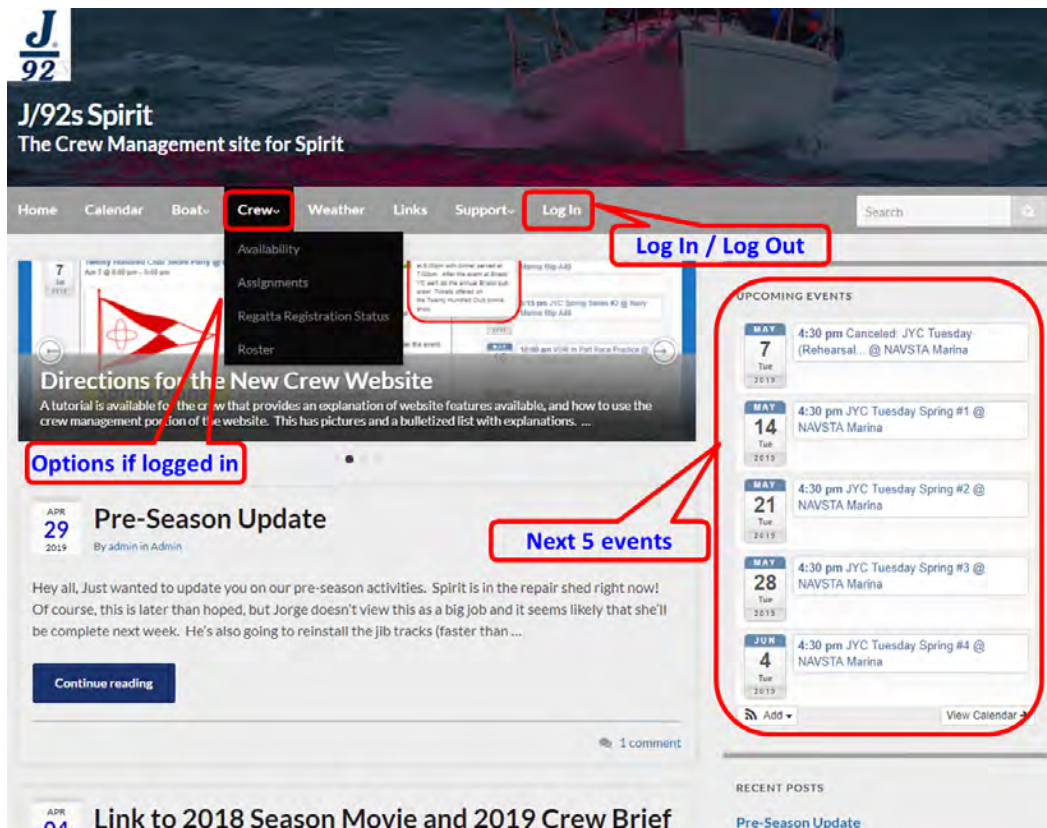


Crew Directions for Crew Manager

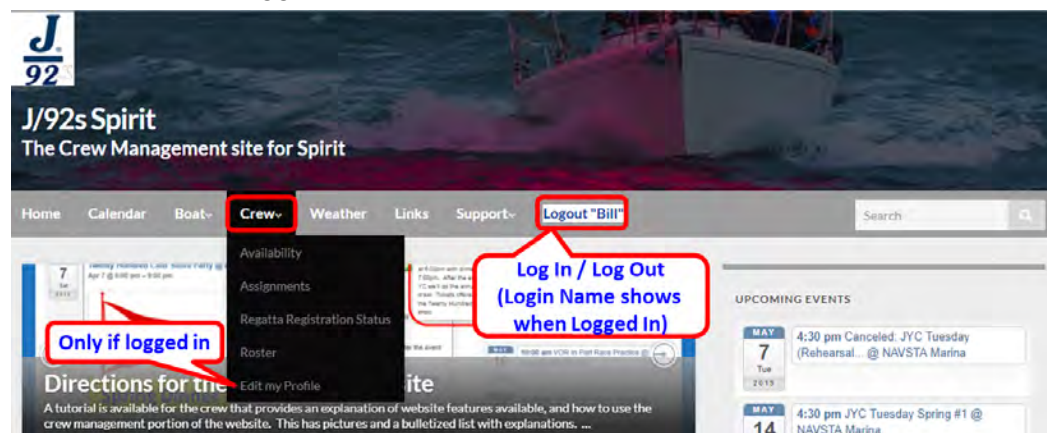
Website Pictures with Examples

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.

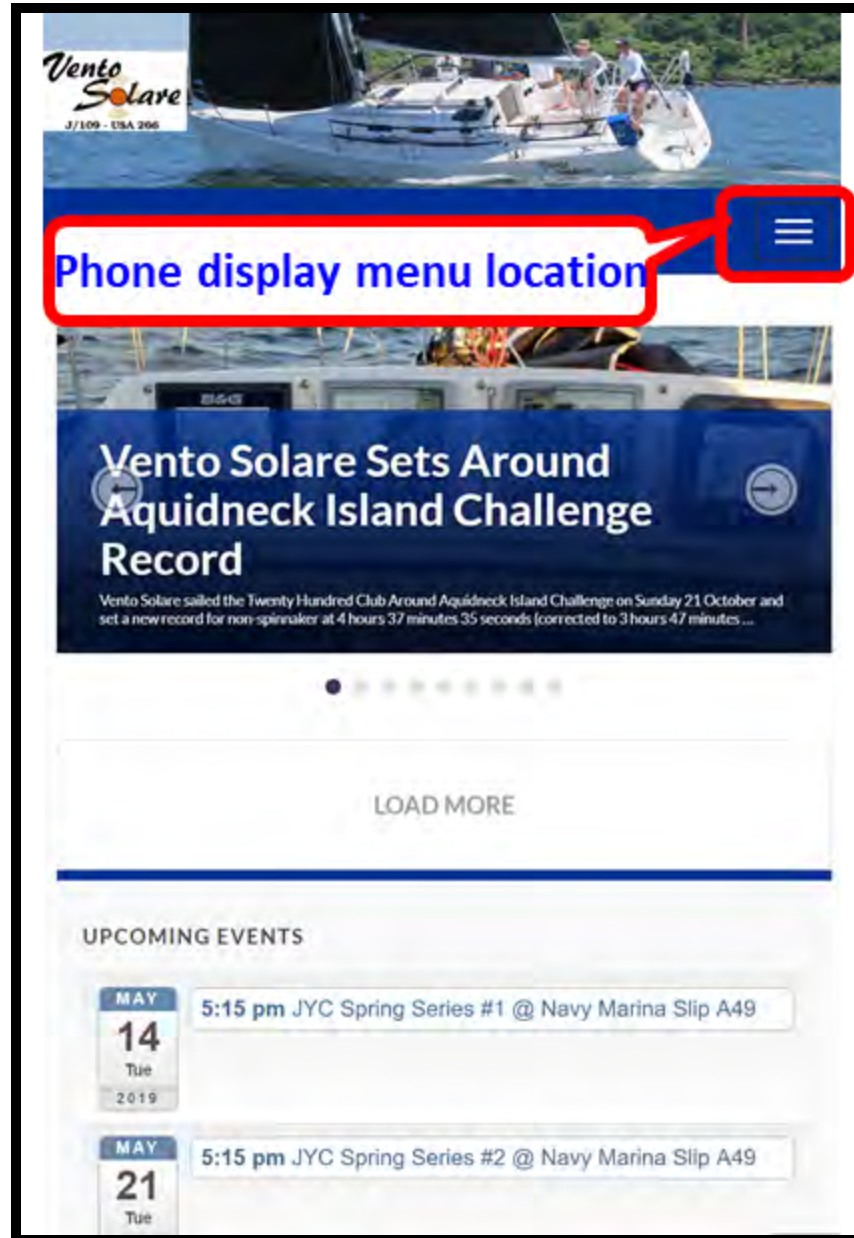




Crew Directions for Crew Manager

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.





Crew Directions for Crew Manager

Annotated Calendar Display - Shows items in Quick Tips

Vento Solare
J/109 - USA 266

Home Calendar Boat Crew Weather Links Photos Logout "Cindy"

Calendar

Categories

APRIL - MAY 2018

Expand All Events

Search Box

Pop-up on mouse over

Category selection

Change Availability Dropdown

Submit Button

Submit Availability Change

Opens event completely

Read more

Spring Dinner

Be at Bristol YC - Sat April 7th @ 6:00PM

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

Name	Position	Assignment	Available
Bill	Skipper	Bring Cindy!	✓
Brenda	Guest		✓
Cindy	Guest		Yes
Eric	Guest		✓
Mary	Guest		✓

Total Crew 5 = Confirmed (5) + Maybe (0)

Post # 215

CATEGORIES: SOCIAL

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

RECENT POSTS

- Vento Solare Sets Around Aquidneck Island Challenge Record
- A Preview of Things to Come
- Vento Solare turning Green!
- One Button Adds the Boat Calendar to Yours!
- Thanks Crew for the Great Sun Shade

=2143



Crew Directions for Crew Manager

Submit comments & stories for an event when logged in

Spring Dinner

shop. **Uniform:** Party attire!
Be at Bristol YC - Sat April 7th @ 6:00PM
Race Results: 1st AAI Challenge Non-Spin, 2nd Cuttyhunk, 1st

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

Name	Position	Available	Assignment
Bill	● Skipper	Yes	Bring Cindy!
Brenda	● Guest	✓	
Cindy	● Guest	✓	
Eric	● Guest	✓	
Mary	● Guest	✓	
Billy	○ Not Assigned	?	
AdamM	● Not Assigned	✗	

Total Crew 5 = Confirmed (5) + Maybe (0)

[Submit Availability Change](#)

Post # 215

Leave a Reply

Logged in as Bill. Log out?

Your message:

Area to leave comments for an event (if logged in)

[Submit Comment](#)

3/30/18
11:12 am
Day
Falling
0.9'
Rate
-1.1'/hr

Newport, Narragansett Bay,
Rhode Island

High: 07:46 AM, 08:08 PM
Low: 01:09 AM, 01:38 PM

Drag the circle on the plot.

Rose Island

Forecast model data currently not available for this spot.

Coasters Harbor

Forecast model data currently not available for this spot.

1BI Bell

Forecast model data currently not available for this spot.



Crew Directions for Crew Manager

View the entire season and set availability for each event

- Menu *Crew, Availability*
- You may set Availability for all events at once using the *Set Default Availability* selector at the top of the column, then may edit individual events
- 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

Availability

Jump to Next Scheduled Event

2019 <=>Select Year, then Click Here to Update

Crew Member Logged in: Bill User ID: 3 (Bill Kneller - 2019)

Change availability for events - Choose *Available* dropdown for events you want to change => Scroll to bottom => Click *Submit Changes*

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

Event	Date	Time	Location	Position Assigned	Available
Set Availability the same for all events, then edit individually =>					-- Set Default Availability --
Pleasure Cruise Around Newport				Skipper	Yes
Twenty Hundred Club Shore Party			Hotel Viking	Skipper	Yes
Instrument Training & Practice Sail	Tue, Apr 23rd	5:00 PM	Navy Marina Slip A49	Helm	Yes
Instrument Calibration	Thu, Apr 25th	10:00 AM	Navy Marina Slip A49	Skipper	Yes
Crew Practice			Navy Marina Slip A49	Helm	Yes
JYC Spring Series #1			Navy Marina Slip A49	Helm	Yes
JYC Spring Series #2	Tue, May 21st	5:15 PM	Navy Marina Slip A49	Helm	Yes
Owen Mitchell Spring BI Race	Sat, May 25th	8:00 AM	Navy Marina Slip A49	Helm	Yes
Lay Day on BI	Sun, May 26th			Skipper	Yes
BI to Newport Cruise	Mon, May 27th			Helm	Yes
JYC Spring Series #3	Tue, May 28th	5:15 PM	Navy Marina Slip A49	Helm	Yes
Deliver Newport to Pilot's Point Marina	Wed, May 29th	8:00 AM	Navy Marina Slip A49	Skipper	Yes
Deliver Pilot's Point to CPYC	Thu, May 30th	7:30 AM	Brewers Pilot's Point Marina	Skipper	Yes
Cedar Point OD Regatta	Sat, Jun 1st - Sun, Jun 2nd	9:00 AM	Cedar Point YC	Helm	Yes

Submit Changes



Crew Directions for Crew Manager

View Assignments for the entire season

- Menu *Crew, Assignments*
- Dropdowns are available to filter by Year and Event Category. 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

Assignments

Display Crew Assignments for Events

[Jump to Next Scheduled Event](#)

2018 -- All Event Categories -- <--Select Year & Event Category, then Click Here to Update

Crew Member Logged in: Bill User ID: 3 (Bill Kneller - 2018)

Change availability for events - Choose *Available* dropdown for events you want to change => Scroll to bottom => Click *Submit Changes*

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

Event	Date	Location	Uniform	Registered	Fees Paid	Results
Twenty Hundred Club Shore Party	Sat, Apr 7th 6:00 PM	Bristol YC	Party attire!	Yes	Yes	1st AAI Challenge Non-Spin, 2nd Cuttyhunk, 1st BI
	Name	Available	Position	Assignment		
	Bill Kneller	Yes	Skipper	Bring Cindy!		
	Brenda Mitchell	✓	Guest			
	Cindy Kneller	✓	Guest			
	Eric Irwin	✓	Guest			
	Mary Martin	✓	Guest			
	Adam Marks	X	Not Assigned			
	Allie Gray	X	Not Assigned			
	Billy Turrell	X	Not Assigned			
	JV Hanson	X	Not Assigned			
	Luke Orchard	X	Not Assigned			
	Total Crew 5 = Confirmed (5) + Maybe (0)					
Event	Date	Location	Uniform	Registered	Fees Paid	Results
North Sails Spinnaker Trial	Tue, Apr 17th 2:45 PM	Borden Light Marina				
	Name	Available	Position	Assignment		
	Bill Kneller	Yes	Helms			
	Brooke Mastrorio	✓	Crew			
	Kimo Worthington	✓	Crew			
	Mary Martin	✓	Crew			
	Allie Gray	?	Not Assigned			
	Billy Turrell	?	Not Assigned			
	JV Hanson	X	Not Assigned			
	Larry Bissonnette	X	Not Assigned			
	Luke Orchard	X	Not Assigned			
	Total Crew 6 = Confirmed (4) + Maybe (2)					
Event	Date	Location	Uniform	Registered	Fees Paid	Results
Cruise from BLM to Navy Marina	Tue, Apr 24th 12:30 PM	Newport Nautical or O'Club Parking Lot				
	Name	Available	Position	Assignment		
	Bill Kneller	Yes	Skipper	Beer & Water		

[Submit Changes](#)

(1) Modify Availability for Multiple Events

(2) Submit Changes when edits are complete



Crew Directions for Crew Manager

Links to Quick Tips

Quick tips are provided in the Documentation and FAQ section of the [Crew Manager Support Forum](#) with those relevant to Crew Members linked below.

- [I Want to be Added to Crew for a Boat](#)
- [How to Set Your Password or Forgot Your Password](#)
- [How to Add the Boat Calendar to Your Own](#)
- [How do I Get Text Messages?](#)
- [Add a Shortcut on Phone Home Screen](#)

Support & Documentation

Support documentation is always available on the Crew Manager Support Forum. Anyone may read the forum but you need to create a forum account to post. The forum is easily reached via the boat website menu where the following choices are provided.

- [Documentation and FAQs](#) - Crew & Skipper manuals and answers to frequently asked questions
- [Crew Manager User Discussion and Questions](#) - If you have a question or want to discuss something post it here.
- [Report a Bug](#) - If you find a problem report it here so it can be addressed.
- [Request a Feature](#) - We are open to suggestions, additions or changes to Crew Manager that will make it better for everyone!

These links open in a new page. The *Home* and associated menu items on the new page are all on the main Crew Manager website, not the boat website.