

APPALACHIAN MOUNTAIN CLUB

AMC Activity Listings: Chapter Trip Reviewer/Approver Guide – Logging In/Account Admin/CSV Data

Download/User Rights Management/My Dashboard/Registration Statistics/Message Center

© Appalachian Mountain Club
5 Joy Street
Boston, MA 02108
Phone 617.523.0636

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AMC Activity Listings Application: An Overview

The Appalachian Mountain Club has developed a searchable online activity listings database for use by staff and volunteers. The purpose of this application is to present a universal set of searchable upcoming AMC events and volunteer opportunities sponsored by volunteer committees or staff. The system also automates the process for volunteer committees submitting their Advance Notice trips to *AMC Outdoors* for inclusion in Backcountry, while at the same time making trips eligible for publication on the AMC website, activities.outdoors.org. Volunteer newsletter editors and webmasters may also extract data from the system to feed their websites and print publications.

The application offers a workflow that allows volunteer committees to create an electronically managed approval process based on the following structure:

- General users have records in the system but no rights to list or edit activities. Users log in once to verify their account, and then they do not take action within the system unless they later take on one of the following roles:
- **Contributors** (trip leaders, trail event organizers) input their trips/volunteer opportunities into a web-based form.
- Trips/volunteer opportunities are then sent to the appropriate volunteer **Reviewer** within the contributor's committee.
- Once reviewed and approved by the committee Reviewer, the trip is passed to the appropriate volunteer committee **Approver**, who makes any final edits and approves the trip on behalf of the committee.
- While trips and volunteer opportunities are not subject to approval by AMC staff, AMC staff may periodically review listings for quality and edit as needed.

Chapter and volunteer committee leaders determine the best workflow for their committees within this structure (illustrated on the next page). If you would like to learn more about how your committee's approval process works check in with your committee chair or click on "My Approval Workflow" under "Events" on the left side of the screen.

Event/Trip Approval

Per the workflow of the system, once trips/volunteer opportunities are added by contributors, they are passed first to committee reviewers for editing and approval, and then to chapter approvers for additional editing and approval. Once this process has been completed within your chapter, the trip listing is published to the web and/or queued for inclusion in the magazine, as designated on the data entry form.


The process of editing and approving trips is the same for both reviewers and approvers. Once logged into the system, trips awaiting your approval will be listed in the table at the bottom of the screen, under Events > Search Events.

Current Berkshire (Mass.) Events

Listing Profile	Date	Status	Event Type Event Title	Edit Stage	Edit Options
	5/02/15 (4/05/15 - 5/02/15)	(O)	Chapter Trip: Squirrel chasing hike through New England Trail bog	Reviewer sent to: Approver	view web edit change status delete

Click on the edit link to open it for review. Browse the trip information and make any edits you see fit. When done, scroll to the bottom and use the Preview button to view how the trip will look when approved. When done, click “Save Edits” or “Save & Reject Back to...”.

APPROVAL

Approve 

Cancel

Clear Changes

Preview

Save Edits

Save & reject back to Reviewer

Bulk Approval (Reviewers & Approvers only)

Following on from the previous section, trips/volunteer opportunities submitted to reviewers and approvers may also be reviewed & approved in bulk.

The process of doing so is the same for both reviewers and approvers. To do this, log into the system and click the “Bulk Approval” link in the left sidebar. A list of trips/volunteer opportunities pending approval will be displayed. For each, you’ll be able to preview the web listing as it would appear on Outdoors.org and the text to be submitted to the magazine.

For events not using the AMC Registration Form, you will see the standard web details view.


my trip - Event 1 of 2 - Web-only

my trip

April 22, 2015 (Wed)

An evening critical treasure hike

Leader:



Faith Salter
([Email this person.](#))

Registration is not required for this activity. However, you may wish to contact us if you have any questions.

Approve this event

Trip at a Glance

Activity: Critical Treasure

Offered By: Test

Status: Open

Location: Massachusetts, Cape Cod, MA

my trip - Event 1 of 2 - Web-only

Event Approved

Test Trip - Event 2 of 2 - Web-only

Event Details

Registration Questions

Test Trip

April 21, 2015 (Tue)

Test description. Test description. Test description. Test description. Test description. Test description. Test description. Test description. Test description. Test description. Test description. Test description. Test description. Test description. Test description.

Registration is closed

Leader:

(Email this person.)

Registration is required for this activity. See contact above.

Trip at a Glance

Activity: Backpacking

Offered By: Test

Status: Open

Location: Massachusetts, Cape Cod, MA

Test Trip - Event 2 of 2 - Web-only

[Event Details](#)

[Registration Questions](#)

***This is an example
True/False question:**

True

False

***Example question
w/optional display on
registration forms:**

***This is a chapter level**

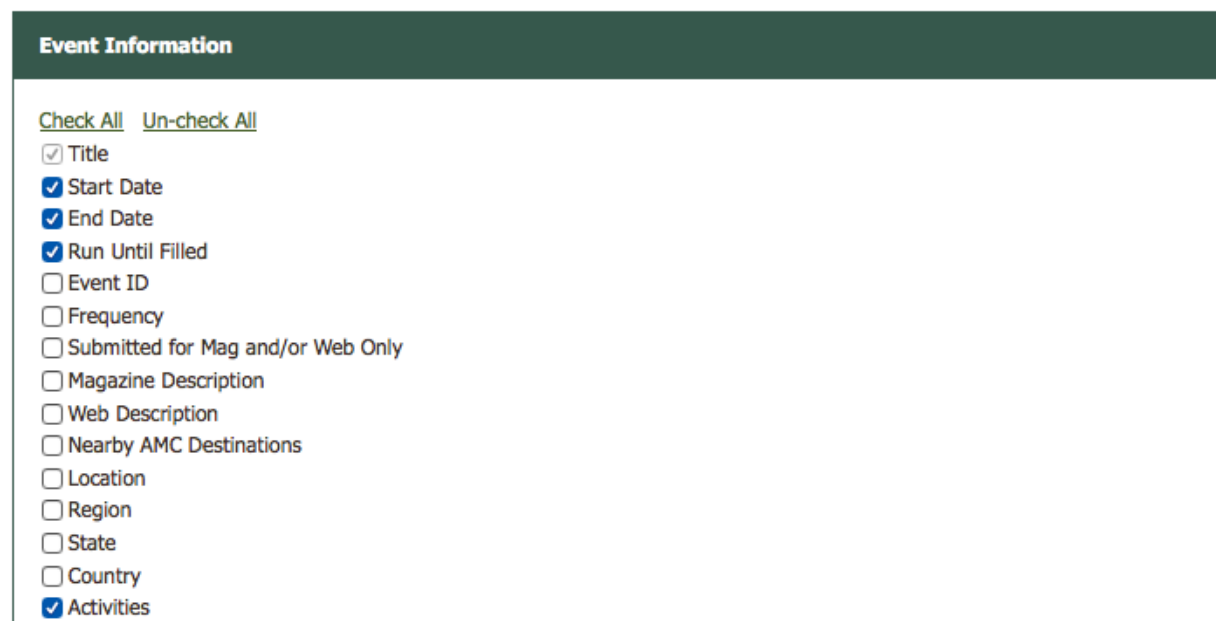
CSV Data Download

Approvers are able to download listing information stored in the system for reporting purposes.

To do this, log into the system and click on the CSV Data Download link in the left navigation pane. The field selection screen will open, providing a list of all fields available to be included in the download as well as a number of search/sort options to better customize the data.

CSV Data Download

Check boxes to include field in download



Event Information

[Check All](#) [Un-check All](#)

- ☒ Title
- ☒ Start Date
- ☒ End Date
- ☒ Run Until Filled
- ☐ Event ID
- ☐ Frequency
- ☐ Submitted for Mag and/or Web Only
- ☐ Magazine Description
- ☐ Web Description
- ☐ Nearby AMC Destinations
- ☐ Location
- ☐ Region
- ☐ State
- ☐ Country
- ☒ Activities

To create your report, select the fields you'd like included in the report by checking the checkbox next to the applicable fields.

Once you've selected the fields you'd like included in the report, use the "Search Criteria" box to filter your report by keyword, region, state, AMC Destination, Committee, Activity, or trip dates.

Click the "Submit" button at the bottom to create the report. The Download Trip Data screen will load, with a CSV file link in the main area of the screen, as shown below.

PC users: Right click on the link and select "Save target as..."

Macintosh users: Click on link and hold. Select "Download link to disk".

[events_berk_langevin_jeff_4282_150421114211.csv](#)

To download the report:

PC users: Right click on the link and select "Save target as..."

Macintosh users: Click on link and hold. Select "Download link to disk".

Save the CSV file to a convenient location on your hard drive. To utilize the file, open it in an application that supports comma-delimited files (e.g. Excel, Access) and manipulate the data as you see fit.

events-11664.csv [Read-Only] - Microsoft Excel

	A1											
	A	B	C	D	E	F	G	H	I	J	K	L
1	TripTitle	TripStartDate	TripEndDate	Activity	TripLeader1	TripLeade	TripLeade	TripLeade	TripCoLeader1	TripCoLea	TripRegist	ContributorN
2	Young Me	8/18/2010		Hiking	Chapter Chair							Faith Salter
3	Mind, Bod	3/25/2011	3/27/2011	Hiking	Anthony Sadasiva						AMC Rese	Joan Aichele
4	St Anthon	3/25/2011	3/27/2011	Hiking	Ron Phelps				Cindy Crosser		Cindy Cro	Ron Phelps
5	2011 Annu	3/26/2011	3/26/2011	Hiking	Stephanie Wall							Social Review
6	AT in Penr	3/26/2011	3/26/2011	Hiking	John Rowen							John Rowen
7	Bucks Cou	3/26/2011	3/26/2011	Hiking	Jeff Lippincott							Jeff Lippincot
8	Class 2-4 C	3/26/2011	3/27/2011	Hiking	John Milne							Eric Pavlak
9	Nockamix	3/26/2011	3/26/2011	Hiking	Peter Jarrett							Peter Jarrett
10	Nockamix	3/26/2011	3/26/2011	Hiking	Joan Aichele				George Gorman			Joan Aichele
11	YM Biking	3/26/2011	3/26/2011	Hiking	Phillip Yu							Phillip Yu
12	AT in Penr	3/27/2011	3/27/2011	Hiking	John Rowen							John Rowen
13	Broad Mo	3/27/2011	3/27/2011	Hiking	Rich Pace							Rich Pace
14	French Cri	3/27/2011	3/27/2011	Hiking	Scott Vant							Scott Vant

Data Download for Print

This feature of the system, launched in spring 2011, is the ability for Approvers to download trip listings and volunteer opportunities for their chapter exactly as submitted for a given issue of AMC Outdoors. For example, 1-2 days prior to a magazine deadline, an approver may wish to view the magazine data as it's queued up for the staff of AMC Outdoors to confirm that all trips are appearing as they should.

To do this, log into the system as an approver and click on the "Magazine Download" link.

MAGAZINE DOWNLOAD

Select Magazine Issue:

May/Jun 2015

▼

Submit

PREVIOUS DOWNLOADS

(Note: only the latest download from any given date is saved.)

[magazine_2015_Iss3-May-Jun_04-20-2015.txt](#) (04/20/2015 10:58:31 PM)

From the "Select Magazine Issue" dropdown menu, select the issue of the magazine that you'd like to preview and click Submit. The system will produce a text file and make it available to open/download on the subsequent screen.

Click the link below to view your magazine download, or right click (pc)/command+click (Mac) to save the file locally.

[magazine_2015_Iss3-May-Jun_04-20-2015.txt](#)

Back to [download admin](#).

To download the report:

PC users: Right click on the link and select "Save target as..."

Macintosh users: Click on link and hold. Select "Download link to disk".

You may also choose to open the text link directly and your computer will use a text editor to open the file.

User Rights Management

As of summer 2014 the process for managing user rights in the Online Trip Listing System has changed. Leaders will now log in to the activities database using their AMC Member Center information (see Logging In for more information).

NOTE: New users must both create their AMC Login account and log into activities.outdoors.org/login before you can add Leader, Contributor, or other rights to their account. They must also be an Active AMC Member. Until they have logged into the OLTL with their AMC Account, you will not find them in the user search results.

Managing Contributor and Reviewer Rights

The activity listings application allows approvers and reviewers to add reviewers and contributors respectively (you can edit rights for anybody with rights below your own).

Start by clicking “Manage User Rights” in the left sidebar. A list of users will be displayed.

Activities

- My Dashboard
 - Registration Stats
 - Manage Digest Emails
 - Message Center
 - Merge Old Login Account
 - Log Out
- Activities Admin
- Activities Search
- USERS
 - My Defaults
 - Manage User Rights**
- LEADERS
 - Manage Leader Rights
 - Add Social Event Leader
 - Manage Field Labels:
 - Choose Committee--
 - Manage Leader Levels:
 - Choose Committee--
 - Manage Chairs
- EVENTS
 - My Approval Workflow

Events | My Dashboard | Admin

Search/Manage Test Group Users

Keyword: Search: Type:

Committee:

Lapsed Members ⓘ
We found **1 lapsed member** account matching your criteria. Users with lapsed AMC Memberships are highlighted.

Non-Members ⓘ
We found **0 non-member** accounts matching your criteria.

If you can't find a user ⓘ, please confirm they have logged into this site (which creates their account) and have an active AMC membership. If you continue to have problems, please contact AMCactivities@outdoors.org.

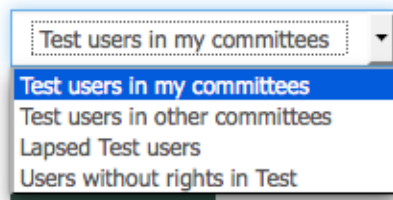
<< Prev 1 Next >>

Actions	Name	Email	Phone	Committee(s)
edit	App 1, Test		(617) 523-0655	Event Manager: Hiking (Approver) Paddling (Approver) Leader Manager:

Enter the name of the individual you want to manage in the keyword box.

If the user is new to OLTL, select “Users without rights in <chapter>” from the Search dropdown and click the “Search Users” button. If you know the user already manages trips for other committees, chose “<chapter> users in my committees” or “<chapter> users in other committees”. If you want to remove rights from a lapsed member, chose “Lapsed <chapter> users”.

Search:



When you find the user you are looking for, click the edit link under the Actions row next to their name:



Once you click edit, you will see the following screen:

Committee	Grant Rights/Approval Level					Leader Email Warnings
Andover	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Backpacking	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Bicycling	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Canoeing	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Conservation	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Education	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Executive Committee	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Family	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Forty Plus	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Hiking	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Hiking/Backpacking	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Intro	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Local Walks/Hikes	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Membership	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Mountaineering	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Music	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Paddling	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	
Skiing	<input type="button" value="None"/>	<input type="button" value="Contributor"/>	<input type="button" value="Reviewer"/>	<input type="button" value="Approver"/>	<input type="button" value="AMC Editor"/>	

Note: Only the committees you are associated with and have Reviewer/Approver rights with will show up on an individual's user right's page.

To add a new Reviewer or Contributor, click on the appropriate option next to the committee name. Clicking on the appropriate rights will automatically update the user’s account privileges.



Membership

None

Contributor

Reviewer

Approver

AMC Editor

Once you have finished updating the user’s rights, you are all set. The new data saves automatically.

Additionally, if you wish to remove privileges from a user, you can do so by following the same steps as above and selecting the ‘None’ option next to the committee.

Again, please be aware that in order to add rights to an individual in the Online Trip Listing System, they must be an Active AMC Member with an AMC Login account and must first log in to the system, establishing a user record themselves, before rights can be added (including the rights to be identified as a leader).

Managing Leader Rights

The activity listings application allows “Leader Managers” to add new leaders to their respective committees. The process for adding leader rights is the same as adding contributors and reviewers. All new users must have a Member Center account and log into activities.outdoors.org/login before you can add user rights to their account. Once they have taken these steps, you can search for them using the screen shown below.

Click on the Manage User Rights link in the left navigation. You will see a list of current users in the system:

Activities

My Dashboard
Registration Stats
Manage Digest Emails
Message Center
Merge Old Login Account
Log Out

Activities Admin

Activities Search

USERS
My Defaults
Manage User Rights

LEADERS
Manage Leader Rights
Add Social Event Leader
Manage Field Labels:
-- Choose Committee--

Manage Leader Levels:
-- Choose Committee--

Manage Chairs

EVENTS
My Approval Workflow

Events | My Dashboard | Admin

Search/Manage Test Group Users

Keyword:

Search:
Test users in my committees

Type:
-- Any type --

Committee:
-- All My Committees --

Search Users

Lapsed Members 1
We found **1 lapsed member** account matching your criteria. Users with lapsed AMC Memberships are **highlighted**.

Non-Members 1
We found **0 non-member** accounts matching your criteria.

If you can't find a user 1, please confirm they have logged into this site (which creates their account) and have an active AMC membership. **If you continue to have problems, please contact AMCactivities@outdoors.org.**

<< Prev

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Next >>

Actions	Name	Email	Phone	Committee(s)
edit	App 1, Test		(617) 523-0655	Event Manager: Hiking (Approver) Paddling (Approver) Leader Manager:

Using the search form, enter the name of the individual you want to add as a leader to your committee. Then, click Search Users (if they are new, you need to select “Users without rights in X” in the “search” dropdown). When you find the user you are looking for, click the edit link under the Actions row next to their name:

12

[edit](#)
Cont 1, Test

(617) 523-0655

Event Manager:
Hiking (Contributor)
Paddling (Contributor)

Leader:
Hiking (L)
Paddling (L)

Click “edit” and on the next screen, scroll down to the “Leader” section.

Leader

Committee	Grant Rights
Hiking	<div>None</div> <div>Inactive</div> <div>L</div> <div>LT</div>
Paddling	<div>None</div> <div>Inactive</div> <div>L</div> <div>LT</div>

Note: Only the committees for which you have “Leader Manager” rights will show up on an individual’s user right’s page.

To add Leader rights, click on the option with the appropriate Leader Level code next to the committee name. Clicking on the appropriate rights will automatically update the user’s account privileges.

Leader

Committee	Grant Rights
Hiking	<div>None</div> <div>Inactive</div> <div>L</div> <div>LT</div>
Custom Field 1:	<div></div> <div>Update (Shown on trip/event entry screen)</div>
Custom Field 2:	<div></div> <div>Update (Shown on trip/event entry screen)</div>
Custom Field 3:	<div></div> <div>Update (Shown on trip/event entry screen)</div>
Paddling	<div>None</div> <div>Inactive</div> <div>L</div> <div>LT</div>

Additional fields required for leaders in the committee will show when applicable.

Once you have finished updating the leader’s rights, you are all set. The new rights save automatically.

To remove Leader rights from a user, you can click “None” next to the committee for which you wish to remove their leader rights. To mark a leader inactive, click “Inactive”. A leader marked Inactive remains in the Leader Audit and allows for easier reactivation of a Leader down the road.

Managing Question Manager Rights

There are three Question Manager levels: AMC, Chapter, and Committee. Users with a higher level of Question Manager rights can add/remove lower question manager rights from other users. See the table below for which levels can add/remove which question manager rights.

User w/ Question Manager Level	Can Manage
AMC-level	Chapter, Committee and Trip-level Question Manager rights
Chapter-level	Committee and Trip-level Question Manager rights
Committee-level	None

Managing Question Manager rights is similar to managing other rights in OLTL. Click the “Manage User Rights” link in the left sidebar. Use the search to find the appropriate user and click the “Edit” link next to their name in the search results.

Scroll down to the “Question Manger” section. Simply toggle Yes/No to add or remove the appropriate right:

Questions Manager - Chapter-Level	
Grant Rights	
Test	<input type="checkbox"/> No <input type="checkbox"/> Yes

Questions Manager - Committee-Level	
Committee	Grant Rights
	<input type="checkbox"/> No All <input type="checkbox"/> Yes All
Hiking	<input type="checkbox"/> No <input type="checkbox"/> Yes
Paddling	<input type="checkbox"/> No <input type="checkbox"/> Yes

Managing Registration Screening Questions

If you have Question Manager rights, you will see the QUESTIONS section of the left sidebar. Depending upon whether you have Chapter, Committee or Trip-level Question Manager rights, you will see one or more of these three question levels:



The screenshot shows a sidebar titled "QUESTIONS". Underneath, it says "Berkshire (Mass.) Chapter-Level" and "Committee-Level:". Below this is a dropdown menu with the text "-- Choose Committee--" and a downward arrow.

To administer questions, click on the Chapter-level link or select a Committee from one of the dropdowns.

The top section of the Question Admin displays the list of questions for that level – Chapter or Committee-Level along with the basic configuration info for the question:

Manage Chapter-level Questions: Test

[Add question](#)

Actions	Question	Question Type	Required	Active	Display Optional
Edit	This is a chapter level question (appears on all reg forms for chapter)?	Text Box (Multi-line)	Yes	Yes	No
Edit	What is rule number 1 ?	Text Box (Single-line)	Yes	Yes	No
Edit	What is rule number 2 ?	Text Box (Single-line)	Yes	Yes	No

“Required” - indicates the registrant must answer the question when on a registration form.

“Active” - indicates whether the question is available for use on associated registration forms.

“Display Optional” - indicates that a contributor can decide whether or not to include the question on their registration form. “No” in this column means that it appears on all registration forms for the appropriate Chapter/Committee.

The bottom section of the Question Admin displays all questions above the level you are managing to help avoid duplication of questions.

You are managing Chapter-Level questions. The questions below are configured above the level you are managing. To make things easier for your end-users, please do not duplicate questions:

AMC-Level Question(s)

***This is an example True/False question:**

True ☐ False ☐

***Example question w/optional display on registration forms:**

Address 3 (example)

To edit a question, click the “Edit” link.

Manage Chapter-level Questions: Test

[Add question](#)

Actions	Question	Question Type	Required	Active	Display Optional
Edit	This is a chapter level question (appears on all reg forms for chapter)?	Text Box (Multi-line)	Yes	Yes	No
Edit	What is rule number 1 ?	Text Box (Single-line)	Yes	Yes	No
Edit	What is rule number 2 ?	Text Box (Single-line)	Yes	Yes	No

The Question Manager will be displayed:

***Question Level:**

***Question:**

***Question Type:**

***Response Required:** ☐ Yes ☒ No

***Display on Reg. Form Optional:** ☐ Yes ☒ No

Question Preview:

***This is a chapter level question (appears on all reg forms for chapter)?**

Characters Remaining: 1000

Save

When you change the field on the form, the Question Preview will update to show how your question will look to the end users registering for an event.

If you choose one of the checkbox or radio button question types, you will need to also configure the individual response options. Click the “Add Answer” link to add a new answer. Enter the text for the answer.

*Question Type:

Checkboxes (with "Other")

*Response Required:

Yes

No

*Display on Reg. Form

Yes

No

Optional:

Answers:

Click & drag answer row to reorder

[Add Answer](#)

#1

First option

Active

Inactive

#2

Second option

Active

Inactive

Question Preview:

*This is a chapter level question (appears on all reg forms for chapter)?

☐ First option

☐ Second option

☐ Other:

You can click drag the alternating color answer rows to re-order the answers.

#1

First option

Active

Inactive

#2

Second option

Active

Inactive

My Dashboard

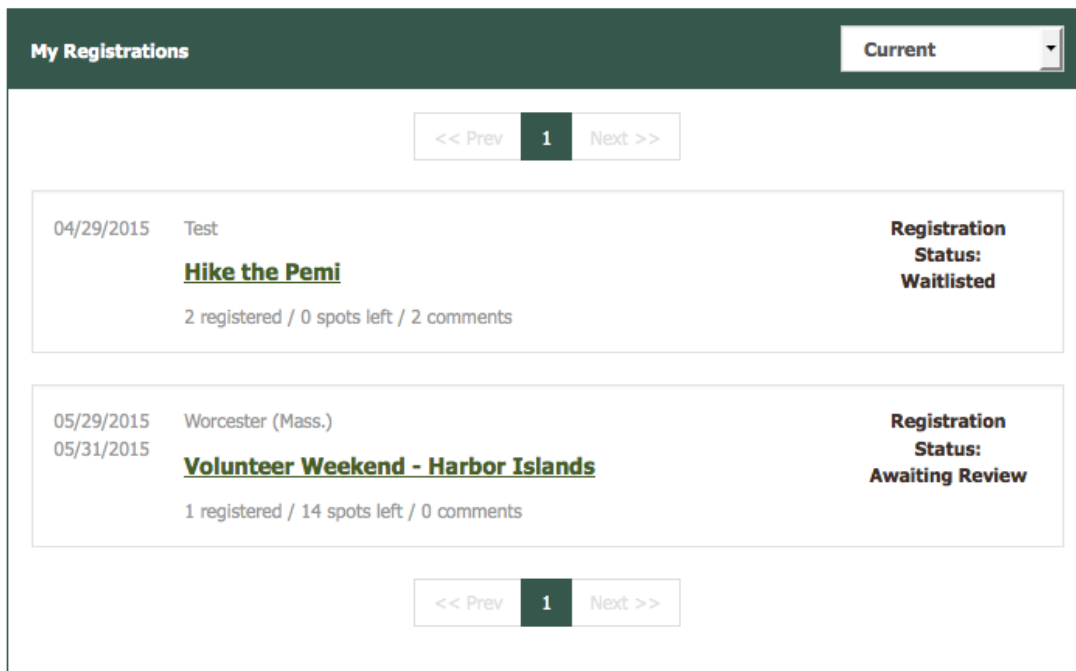
Click the “My Dashboard” link in the left sidebar to view your dashboard. The new dashboard is a convenient place to view trips you’ve registered for and trips you’re leading that use the AMC Registration Form.

The Dashboard contains one or two sections depending upon your rights. Leaders will have both “My Registrations” and “Trips I’m Leading”; all other users will have only the “My Registrations” section. Both sections display current/upcoming events. Choose “Past” from the dropdown at the top right to view your past Events.



My Registrations

My Registrations lists an event for which you’ve submitted a registration request as a participant.



Clicking the title of the event will bring you to the Details and Rideshare Board page. You will not be able to post a comment on the rideshare board until your registration request has been approved by the Leader of the event.

To view and/or edit your registration, click the “View” link in the status column.

Volunteer Weekend - Harbor Islands

Worcester (Mass.) - Family

May 29, 2015 (Fri)

Open (O)

Participants: 1 of 15 spaces taken

Waitlist: 0 of 6 spaces taken

Unconfirmed/Awaiting Further Review or Action				
Status	Name	Email	Phone	Submitted
Awaiting Review View Cancel	Test Cont 1		(617) 523-0655	04/21/2015 12:28PM

Rideshare Board

Once you have been confirmed as a participant, you will be able to use the Rideshare Board.

The form will be redisplayed with your answers.

Volunteer Weekend - Harbor Islands - May 29, 2015 (Fri)

Worcester (Mass.) - Family

Open (O)

Participants: 1 of 15 spaces taken

Waitlist: 0 of 6 spaces taken

Name: Test Cont 1
Email: support@outdoors.org
Phone: (617) 523-0655
Registration: Awaiting Review ([Cancel This Registration](#))

Registration Questions	
*This is an example True/False question:	<input type="checkbox"/> True <input type="checkbox"/> False
*Example question	<input type="text" value="This is my response"/>

Update any question responses as needed and click the “Update Registration” button at the bottom of the form.

<input type="button" value="Update Registration"/>
--

Your answers will be updated and the emails will be sent to the appropriate event organizers.

Thank you for updating your registration!

An email has been sent to the organizers of this event.

You will be emailed when the status of your request is updated. You can also check the status in your [dashboard](#).

Once a leader has screened your registration request and confirmed you as a participant, you will have access to the event's Rideshare Board. Here you can interact with other participants. Enter a comment and click the "Post Comment" button. The comment will be posted to the board.

Rideshare Board

Offer a ride, ask a question, leave comment:

Post Comment (1000 chars. max)

<< Prev 1 Next >>

Test Cont 2 on 03/17/2015 at 12:11am
me too!

Test Cont 1 on 03/16/2015 at 11:21am
Looking forward to it!

<< Prev 1 Next >>

Trips I'm Leading

If you have Leader rights, the Dashboard will contain a second section called "Trips I'm Leading". This section only lists the trips that use the AMC Registration Form.

Trips I'm Leading (w/ AMC Registration Form) **Current**

<< Prev 1 Next >>

04/29/2015 Test
Hike the Pemi
2 registered / 0 spots left / 2 comments

11/06/2015 Test
11/08/2015
Fall 4,000 Footer Weekend
4 registered / 6 spots left / 0 comments

<< Prev 1 Next >>

Click the title of an event to view the event’s registration information. In addition to the rideshare board (at the bottom of the page), Leaders (and approvers) will be able to manage participant registrations.

Unconfirmed participants are in their own section near the top of the page:

Fall 4,000 Footer Weekend
Test - Paddling
Nov 06, 2015 (Fri)
Open (O)
Participants: 4 of 10 spaces taken
Waitlist: N/A

[Contact Registrants](#)

Awaiting Screening/Unconfirmed/Cancelled				
Status	Name	Email	Phone	Submitted
None awaiting screening				

The section will indicate if there are none waiting (above) or list basic contact info for registrants (below) along with the current status and when they submitted their request. Click on the “View” link to screen the user’s question responses.

Awaiting Screening/Unconfirmed/Cancelled				
Status	Name	Email	Phone	Submitted
Waitlisted View Cancel	Test Cont 1		(617) 523-0655	03/16/2015 12:22AM
Waitlisted View Cancel	Test Cont 2		617-523-0655	03/17/2015 12:05AM
Cancelled View	Jeff Langevin		(617) 523-0655	03/17/2015 4:14PM

The user’s registration details page will be displayed. The user’s contact information and a status box will be displayed (below). When you update the registration status, the registrant is automatically notified of the change via email. Leaders are Bcc'd so they have confirmation that the registrant was notified of their registration status change.

Status:	<div>Confirmed</div>	Update Status
Paym	<div>Awaiting Review</div> <div>Pending - Awaiting Payment</div> <div>Pending - Awaiting Payment (Spot held)</div> <div>Waitlisted</div> <div>Confirmed</div> <div>Cancelled</div>	
Payme		Note

Several statuses are available. “Confirmed” and “Pending – Awaiting Payment (Spot held)” will reserve a spot for a participant and count toward any Participant Limit. “Waitlisted” will count toward the Waitlist Limit. Once all participant and waitlist spots are taken, you will only be able to mark registrations “Cancelled” unless a spot opens through a cancellation.

The next section allows you to record a payment. Enter a payment date, the amount and a note if appropriate to help track partial and full payments. Then click the “Save” button. Payments will be recorded below the form:

Payment(s)		
Payment Date	Amount	Note
<input type="text"/>	<input type="text"/>	<input type="text"/>
04/20/2015	\$250.00	Balance paid in full
04/02/2015	\$100.00	Initial deposit

The next section contains the registrant’s question responses for review. The form is disabled and the “Update Registration” button is hidden initially. If you need to update the registration for the registrant (they can update the registration as well), click the “Edit Question Responses” button at the top of the form:

Registration Questions

Edit Question Responses

*This is an example True/False question:

True False

*Example question w/optional display on registration forms:

100 Main St.

The form fields will be enabled (no longer grayed out) and “Update Registration” button will be displayed:

*This is an example True/False question:

True False

*Example question w/optional display on registration forms:

100 Main St.

*What is rule number 2?

Don't know

Update Registration

When done making changes, click the “Update Registration” button to save them. No automatic email is generated when a leader (or approver) updates a registration. You can notify the registrant if needed using the Message Center (see Message Center section later in this document).

The Participant List section displays all confirmed participants. You can cancel and edit any of these registrations as needed using the instructions above. You can view a printable roster of these participants in

PDF or HTML format by clicking the appropriate link in the header of this section. Clicking either of these will open a new browser tab.

Participant List (Print roster : PDF HTML Post-Trip Reporting)			
Status	Name	Email	Phone
Confirmed View Cancel	Test Cont 1		(617) 523-0655
Confirmed View Cancel	Test Cont 2		617-523-0655

Example of HTML Roster:

Hike the Pemi Roster - Apr 29, 2015 (Wed)

	Name	Email	Phone	Payment Received	Waiver	No Show	Incident	Incident Report
1	Test Cont 1		(617) 523-0655	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Test Cont 2		617-523-0655	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Post-trip Reporting allows for tracking of basic info about participants. Click the link in the header of the Participant List section:

Participant List (Print rosters : PDF HTML Post-Trip Reporting)			
Status	Name	Email	Phone
Confirmed View Cancel	Test Cont 1		(617) 523-0655
Confirmed View Cancel	Test Cont 2		617-523-0655

This form looks very similar to the printable roster. Check the appropriate box(es) for your participants and click the “Submit” button. You will briefly see the button disappear, replaced by a spinner while your changes are saved.

Name	Email	Phone	No Show	Paid	Waiver	Incident	Incident Report
Test Cont 1		(617) 523-0655	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Cont 2		617-523-0655	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Registration Statistics

To view statistics on your event participants, click the “Registration Statistics” link under the “My Dashboard” section of the left sidebar. This page can be used to filter results based upon date ranges. The report is grouped by Chapter/Group and Committee. If you have both Leader and Approver rights, you can change the report type to display committees in which you have Leader or Approver rights. If you only have one of these rights, you will only be able to view that report type.

Registration Stats

Starts After: 

Starts Before: 

Report Type: 

Filter

	Events	Waiver	No Show	Paid	Incident	Incident Report
Total:	29	1	1	1	1	0
Berkshire (Mass.) Totals:	5	0	0	0	0	0
Appalachian Trail	0	0	0	0	0	0
Canoe & Kayak	2	0	0	0	0	0
Conservation	0	0	0	0	0	0
Education	1	0	0	0	0	0

Message Center

To initiate a message between you and your participants/registrants, from the Dashboard, click the name of any event you are leading. From the list of registrants, check the box next to any name you would like to contact, enter the message in the box below and click “Send Message”. The message will be sent to only those who you’ve checked off including yourself.

All Message Center emails will come from no-reply@outdoors.org and contain a link to the log in to reply. If the user clicks the link and is not logged in, once they log in, they will be taken to the message center and the proper message will automatically load.

Choose Participants to Contact

Email	Name	Status
<input checked="" type="checkbox"/>	Test Cont 1	Confirmed
<input checked="" type="checkbox"/>	Test Cont 2	Confirmed
<input type="checkbox"/>	Jacob Brown	Cancelled
<input type="checkbox"/>	Jeff Langevin	Cancelled
<input type="checkbox"/>	Venson Shih	Cancelled
<input type="checkbox"/>	Douglas Berry	Awaiting Review
<input type="checkbox"/>	Elizabeth Deegear	Awaiting Review
<input type="checkbox"/>	Kelly Powers	Awaiting Review
<input type="checkbox"/>	Leonardo Crisostomo	Awaiting Review
<input type="checkbox"/>	Michael Williams	Awaiting Review
<input type="checkbox"/>	Jim Scheef	Awaiting Review
<input type="checkbox"/>	Sabine Prather	Awaiting Review

You have been confirmed as participants pending receipt of your payment. Please send to 5 Joy Street, Boston, MA 02108.

Send Message

Once the email has been sent, you will be taken to the Message Center.

Message Center

View messages from Trip Leaders/Organizers.

Messages	Message Detail
Test Cont 1, Test Cont 2, 1 others 4/21/2015 4:39 PM You have been confirmed as par...	Recipients on this message thread: Test Cont 1, Test Cont 2, Jeff Langevin
Jeff Langevin 3/27/2015 12:34 PM Testing?	Jeff Langevin 4/21/2015 4:39 PM You have been confirmed as participants pending receipt of your payment. Please send to 5 Joy Street, Boston, MA 02108.
Jeff Langevin 3/27/2015 12:32 PM Testing?	
Jeff Langevin 3/27/2015 12:30 PM Testing?	
Jeff Langevin 3/27/2015 12:29 PM Sorry for including you on my ...	

To add a reply to the message thread, enter your message in the box at the bottom of the right-hand panel and click “Reply”. It will be sent to all message thread recipients listed at the top of the right-hand panel.

Reply (1000 chars. max)

To read or reply to a different message, click the message in the left-hand panel and the message thread will load in the right-hand panel.

Messages	Message Detail
Test Cont 1, Test Cont 2, 1 others 4/21/2015 4:39 PM You have been confirmed as par...	Recipients on this message thread: Jeff Langevin
Jeff Langevin 3/27/2015 12:34 PM Testing?	Jeff Langevin 3/27/2015 12:34 PM Testing?