How to Create a Trip or Event

1. Introduction

This is a detailed guide on how to create a trip and manage participants in our on-line calendar system. You need to be given permission to coordinate ACC Vancouver section trips. See this link for more information on how to get set-up.

Please let our WebHelp team know if you have any questions about this guide or need some help.

2. Login to the Website

If you are logging into the new website for the first time you will need to update your password.

- Click on the Login button on the top right side of the page.
- Attempt to login, and say, I forgot my password. The new system uses your email as your login. Or you can use the password reset link.
- WordPress will send you an email to reset your password. Check the email and follow the instructions on the link. You might have to check your junk email folder.
- Login with the password you just created/saved.

3. Create the Trip

To create a trip or event, you are required to log in with an ACC Vancouver account which has the right permissions to edit the Trips and Events calendar. Most event related functions can be reached through quick links accessed by hovering over your profile picture. Alternatively you find the Create an event link on the Trips/Events page.

ACC
Vancouver

TRIPS/EVENTS   COURSES   HUTS   COMMUNITY   RESOURCES   JOIN US   ABOUT

Trips and Events

We offer trips at all levels.

CREATE AN EVENT

Calendar   List

View all categories

December 2020

TODAY   <   >

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30 New Waitlist event	1	2	3	4	5	6
7	8	9	10 Test event	11	12 Test trip with waiting list	13

Create an Event

Event title*

Paul Ridge - 2021/04/10

Event description:*

| Paragraph ▼ | **B** | *I* | ⅰ≡ | 1≡ | 66 | ≡ | ≡ | ≡ | 🔗 | ≡ | ⤢ | ⌨ |

Paul Ridge is one of my favourite places to go skiing when there is good snow. You get to drive fairly hight and its not too crowded since the road and small parking lot restricts crowds. The terrain is simple with great views if the weather is good.

The plan is to meet at the Brackendale Starbucks by Canadian Tire.

We will head to the highpoint and look for good slopes to ski.

P

The description should include the **itinerary**, **required items** and **recommended items** to bring as well as **required experience** of the participants.

Trip or Event Name: Note how I added the trip date to the Event Name. If you plan on leading multiple trips to the same location, this helps find the event when you are managing it.

The **Event Description** field is the placeholder for most of the information about your event, make sure you add as much information as you think is needed, including:

- an itinerary: since this is public you may not want to add the time and location for the meetup location here. Include the expected time to get back to the trailhead and back to Vancouver.
- experience needed for trip
- details about type of trip - if hiking you might include if bushwhacking is involved, or the type of footwear needed. I like wearing long pants and heavier boots if bushwhacking.
- information about any special or optional equipment needed

Event start

| 10-04-2021 | 8:00am |

Event end

| 10-04-2021 | 4:00pm | ☐ All day |

Event picture

Choose File   no file selected

Max file-size 2 Mb

The new system allows you to select the date/time by clicking on the calendar.

You can add a picture. If you don't have one, you could search the web and do a screen capture to create a JPEG.

3.1   Event Destination
If a location isn't in the drop down, it's easy to add a location.

- Fill in the name of the nearest town in the City field
- On the map adjust the zoom, so you can see the peak or area you are travelling to. Drag the "pin" location icon to the correct place.

Event Destination*

Create new Destination ⬍

Destination Name:
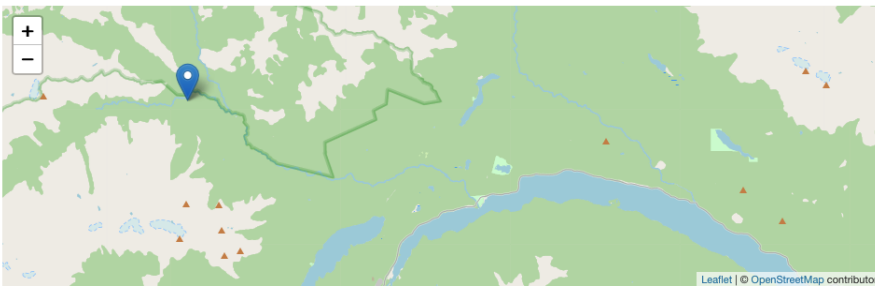
South Chilcotin Provincia

Address:

City:

Gold Bridge

State:

BC

Latitude/Longitude: 50.941123218673084, -122.9877480947938

If you see a problem with a current destination (most users can't change destinations once they are created) or if you need help - please contact the WebHelp team.

3.2   Set Event Category

Event category*

☐ Climbing
☑ Hiking
☐ Ice Climbing
☐ Mountaineering
☐ Scramble
☐ Skiing
☐ Snow Shoeing
☐ Social
☐ Training

3.3 Waitlist Feature

The waitlist feature allows you to review the participants and confirm if they have the right experience for a trip. You wouldn't use this for a social or an easy hike. The feature is usually for more difficult trips.

Waitlist event?

- ● Yes
- ○ No

Check this option to have sign-ups be submitted as pending

3.4 Set Difficulty

Difficulty*

Easy

Select a difficulty for your event

3.5 Carpool Information

Carpool Event?

- ○ No
- ● Yes

Carpool Distance (return)

140

Enter the distance from the carpool location to the event and back

Carpool Departure Time

7 am

Carpool Location

St. David's church parking lot in West Van

There is an option to add a additional trip coordinator:

Additional Event Organizer

To add an additional Event Organizer, type in at least 4 letters of the name and wait for the search to return a list.

jay-macarthur   Remove

Search Event Organizer

Spaces: You can type in the number of participants in the Spaces field. On trips without a waitlist the Spaces field provides the maximum number. The system won't create a waitlist and won't register more than the number of spaces. So for a social you can use a number like 100 depending on the venue.

Spaces

5

Price

[Submit]

The **Price** field is for courses or guided trips where a fee must be paid. The default of 0 doesn't have to be added. In the future, we hope to add a link to a payment system.

After you submit, it's a good idea to check the calendar to make sure everything is okay.

4. How to check on people signed-up

Go into the Calendar, find your trip by date or category.
- Click on your trip
- Click the plus button beside Sign-Ups
- That opens up the table shown below
- If you click on the person's name it brings up some information about them with a list of the trips they have gone on.

⊖ **Sign-Ups**

		Cell Phone Number	Emergency Contact Name	Emergency Contact Number	Altern
	Jay MacArthur	604-209-2646	Lucy MacArthur	604-619-4812	Janine
	Guest				
	Flo	836-745-6323	U Geier	423-434-3434	J Geier

⊕ **Waitlist**
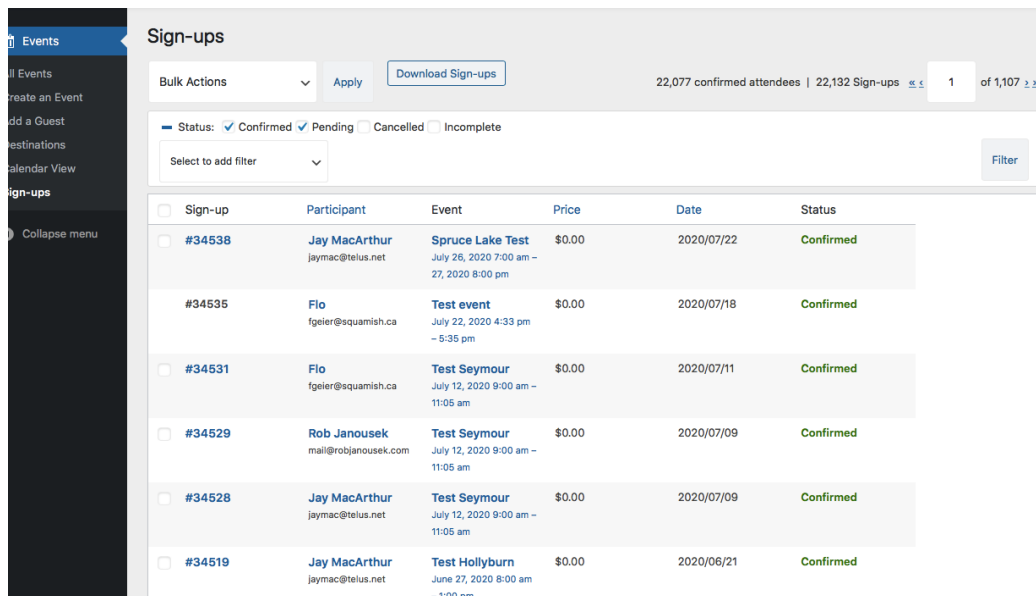
5. How to extract the list to a spreadsheet

You should do this for most trips to create a list of people coming along with their emergency contact information.   You also need to do this to send the list to a responsible person in case of emergency.

- Hover over the user icon on the top right.
- Select the Manage sign-ups to my events

That opens this page:

You can filter the list to include only the sign-ups for your trip by:

Clicking on an event name in the list, this automatically filters the list by that event name. Alternatively you can filter by:

- Clicking on the Select to add filter pull-down
- Click on Event Name
- Add the Name of Event
- Select the name
- You can also filter by date in Chrome (broken in Safari)

Filter Result:

If someone needs to be removed from the list, you should copy their email and send a note something like this:

I'm sorry that your pending sign-up was not accepted for our trip to _____. I have had to make a difficult decision on who can come. I hope to see you soon on another trip or at a social. Let me know if you might be interested in coming if we have a cancellation.

If you hover over their sign-up number, there is an option to cancel the sign-up.

Or you can click the View option and then change the Sign-Up Status at top right:

Status	Trips with no waitlist	Trips with waitlist
Pending	If paid trip this indicates that payment was not received yet.	Default for trips with waitlist
Confirmed	Auto-fill during registration	Coordinator changes to this if you are accepted.
Cancelled	User or trip coordinator can change to this.	The leader must manually change to this if a person doesn't have the right experience, gear or transportation.
Incomplete		This can be used if coordinator is waiting for information or payment

5.1   Download list to send to participants for car-pool set-up

If you click on Download Sign-ups, this gives you a "CSV" file.

- Under Select custom fields: check the car-pool info
- Click on blue Download box on the far right

- The file will download to your Downloads directory.
- You can work that in Excel, Numbers or Google sheets.
- Add your own car-pool information to the sheet.

Sample test trip:

You can see that many of the columns are not needed. Delete most of these and keep the Participant name and email address. Further right is the phone number, carpool information and emergency contact information.

A	B	C	D	E	F	G	H
ign-up Reference	Event	Date	Participant	E-mail	Spot Quantit	Total Price	sign-up Note
34867	Test with wa	0	Jay MacArthur	jaymac@t	1	0	
34871	Test with wa	2021-03-24	Rob Janousek	mail@rob	1	0	
34881	Test with wa	2021-03-24	Belinda Li	belinda@t	1	0	
34883	Test with wa	2021-03-24	Amber McMinn	amcminn(	1	0	

After removing a few columns it looks like this - ready to send to confirmed participants so they can arrange carpools. I have changed the phone numbers for privacy purposes.

A	B	C	D	E	F
Participant	E-mail	Can you drive?	How many passe	What part of tow	Cell Phone Numb
Jay MacArthur	jaymac@telus.net				604-123-1234
Rob Janousek	mail@robj	No			420-123-1234
Belinda Li	belinda@t	No			
Amber McMinn	amcminn(	No			420-npa-nxxx

Suggested email (use BCC option to send to list) to confirmed trip participants:

Subject: Trip to _____

You are now confirmed to come on our trip. I have attached a list of participants so we can arrange car-pools.

If you can't attend please let me know as soon as possible so I can add someone from the waiting list.

6. Trips with a Waitlist

The system currently adds all participants as Pending. When "managing the sign-ups" you will need to update the participant status to Confirmed if they have the right experience and there is room. If a person doesn't have the right experience, you can change their status to "Cancelled". You can leave others as "Pending" in-case someone drops out.

After you download to a spreadsheet, you could filter the waitlist by that status to create two or three email lists to send information to.

Suggestions for Improvements

If you have any ideas to improve the system please send an email to the WebHelp team.