

# Trip Leader Instructions for the Online Activity Schedule

[www.cmc.org](http://www.cmc.org)

Here are some procedures we hope will make it easier for all you Trip Leaders from anywhere in the state to schedule trips, manage your trip rosters, and file trip reports, all from the comfort of your home or office. Feel free to call the office anytime for more pointers: 303-279-3080 or 800-633-4417, ext. 2.

## Quick Tips:

### Scheduling a Trip

Check for scheduling conflicts  
Go to "Schedule a Trip"  
Find a trip description you like  
"Schedule"  
Select the date  
Edit description, etc.  
Double check everything  
"Save to Activity Schedule"

### Entering a Trip Report

"Roster"  
Delete people who cancelled  
Check off people who no-showed  
Add other people who came  
Make "Notes" on people if desired  
Fill in all boxes  
"Save"  
"Activity Report Complete"

### Confirming a Trip

"Edit"  
Enter info:  
Where to meet                      When to meet  
How many participants          LIT?  
Special instructions  
Password, if needed  
"Confirm"

Or

"Edit"  
Denver: Check "Register with Leader" box  
Enter number of participants  
"Confirm"

### Printing Out Your Roster

"Roster"  
"Export Roster"  
"Print"

## More Exhaustive (exhausting?) Instructions:

**You'll need a "user name" and a "password"** to sign into the Member Only pages. Once you're in, you'll actually have two different personas as far as the computer is concerned: you the CMC MEMBER, and you the CMC TRIP LEADER. These are two different interactive working areas. In the "MEMBER" pages, you can access your Personal Data and keep it updated, renew your membership, and view the online Activity Schedule in the "Trip Signup" area. In the "LEADER" pages (in the upper right-hand corner of your screen), you can manage your CMC trips. For the purposes of these instructions, you'll need to work in the "LEADER" area, so select that first. To go between the LEADER pages to the MEMBER pages, just select "Members" on the far right-hand end of the top green bar, right below "Logout." You can easily move from one working area to the other and back again.

If you don't know your User Name and Password, call the office.

**Different Groups have varying procedures**, so if you're not sure how your Group wants to handle all this, please check with your Group Chairperson or Scheduler. These procedures are also subject to change as we all learn how to better use the new online Activity Schedule system.

**These Groups allow Leaders to schedule and approve their own new trips, anytime:** Aspen, El Pueblo, Fort Collins, Gore Range, Longs Peak, Pikes Peak, Sneffels, Weld County, and Western Slope.

**These Groups allow Leaders to schedule new trips anytime, subject to the approval of a Scheduler:** Boulder, Colorado Wilderness Kids, Denver, Shining Mountains, and San Juan. Leaders suggest (propose) a trip, a Scheduler looks at it and approves or rejects it, usually within 24 hours. If it is approved, you can confirm it 30 days prior to the trip date. If it's rejected, the scheduler may ask you to choose a different day or destination, and submit it again. This usually takes place via email.

**Denver Group Leaders** need to have each trip type they lead entered in their Leader Profile by the office staff. If you want to lead a new type of trip, call the office, and we'll set you up in the system so you can schedule it.

**At this time**, most Denver Group trips allow members to signup for trips online, and other Groups' trips are mostly "Register with Leader." However, Leaders in other Groups may allow web signup by assigning a password and confirming the trip, which will allow participants to signup online after talking with the Leader and obtaining the password. See the trip confirmation and password procedures, below.

## How to Schedule a Trip:

**There are two major steps** to complete when adding a trip to the activity schedule:

1. First, you need to make sure there aren't similar or identical trips already in the schedule on that day.
2. Second, you need to load the information for your trip.

**To check the schedule for conflicts:**

You can either do this in the LEADER area, or in the MEMBERS area in the regular "Trip Signup" Activity Schedule.

As a MEMBER:

1. Go to MEMBERS on the top bar under LOGOUT.
2. Go to TRIP SIGNUP in the left-hand column to view the Activity Schedule search engine.
3. Search for your type of trip in a given date range. For instance: all C trips on a certain weekend.

As a LEADER:

1. Click on LEADER in the upper right corner. If there is no leader tab, the system is not recognizing you as a leader. Please ask your Group Chair or Leadership Chair to call or email the office to have you added as a leader.
2. Click on SCHEDULE A TRIP in the left hand column to open the "catalog search" page.
3. Enter your TRIP TYPE(S) in the dropdown menu.
  - a. You can select multiple trip types by holding down the Shift Key and clicking on several trip types, for instance, all the "A hikes" or "Snowshoe trips." To deselect these choices, hold down the Control Key, and click on the selected trips again, one by one.
  - b. You can select two completely different trip types (like "Easy A hikes" and "Easy Snowshoe trips" by selecting one, holding down the Control Key, then selecting the other. To deselect these choices, hit the Control Key and click on the trip types again.
4. Click on "VIEW CURRENT TRIPS BY TYPE" and then on "OPEN". This will give you an overview of all trips in the schedule for the trip type(s) you selected in an Excel spreadsheet.

Look at the date you'd like to schedule your trip to make sure someone else doesn't have the same or very similar trip already scheduled. If necessary, select a different date or destination. Be courteous to your fellow leaders and don't schedule too many trips of one classification or in a certain area on the same day.

**Note:** Indian Peaks Wilderness (IPW) requires a permit, and only allows one hiking group per day in each "travel zone." Check with the state office or your Group Scheduler for information about checking for the availability of

permits and obtaining a permit. IPW and other Wilderness Areas limit groups to 12 heartbeats (9 people, 2 llamas, and a dog, for instance). Dogs are not allowed in most National Parks.

**To schedule your trip:**

1. Click on "LEADER," then go to "Schedule a Trip," and enter a key word from your trip title, for example: "Bear" or "Grizzly". Avoid words like "peak" since it can be spelled various ways (i.e. Peak, Pk, and Pk.)
2. Click on "SEARCH".
3. Find a trip description you like (check out several, if necessary). If possible, select one from your group, which may already have the estimated driving mileage. Click on "SCHEDULE".
4. The "TRIP EDIT" page will open. Your Leader Information will automatically be entered.
5. Fill out your trip information using the various dropdowns and text boxes.
6. If you don't need a dropdown menu, just leave it on "Select".
7. For day trips, leave "END DATE" blank, as it is *only* used for multi-day trips.
8. Double check that trip mileage, elevation gain, driving distance, and trip classification are as accurate as possible.
9. Click on "SAVE TO ACTIVITY SCHEDULE" and if your Group requires it, it be sent to a scheduler for approval. If it doesn't "save," go back up and double check everything, to see if you've left anything off, or need to check your dates. Omitted fields will have a red \* next to them.
10. Approved trips can be confirmed anytime 30 days or less in advance. Participants cannot register online until the trip is confirmed, and "It is too early to register for this trip, please check closer to the trip date." will show under your trip description until it is confirmed.

**Note:** for joint trips with other Groups, a Leader from that Group will also need to enter the trip, showing themselves as the first Leader. Please coordinate with that person re: number of participants.

### Trip Status

This is how your list of trips might look when you click on LEADER:  
Note the three-month default date range; you can extend it backward and forward.

There are five stages in the life of a CMC trip:

- Suggested (for Boulder, CWKs, Denver, Shining Mountains and San Juan)
- Approved
- Confirmed
- Closed
- Complete

If you've Canceled your trip, it will also show on your trip list.

Your trip will Close at midnight before your trip, and show Complete as soon as you've entered in your Trip Report after the trip.

The screenshot shows the 'Trip Leader' interface on the CMC website. It includes a navigation menu at the top, a banner for 'The Colorado Mountain Club', and a sidebar with links to 'My Trips', 'Schedule a Trip', and 'My Leader Info'. The main content area displays a table of trips with the following data:

Trip#	Trip Title	Group	Type	Start Date	End Date	Status
3300	Raleigh Pk. Loop 8,183'	Denver	Difficult B	11/10/2007		Complete
3462	Keystone Downhill	Denver	Downhillers	11/22/2007		Canceled
3301	Chatfield Backwoods Loop	Denver	Moderate B	12/08/2007		Confirmed
4552	Copper Mountain Resort	Denver	Downhillers	01/01/2008		Confirmed
3302	Gold Hill Loop 11,920"	Denver	Mod. Snowshoe	01/12/2008		Approved

The 'Status' column is circled in red in the original image. Each status cell contains a small 'edit' link.

## Trip Changes and Cancellation

You can only make changes to a trip *before* you confirm it. If you need to change it after you've confirmed it, call the office, and we can make changes from here. Please notify any people already on your roster of any late changes.

If you need to change your trip date, classification, mileage/elevation, or destination, before you've confirmed your trip, check for schedule conflicts, and then make the change in the EDIT screen. In one of the three Trip Title fields, put, in capital letters, "NEW DATE" or "NEW DESTINATION" etc. Then, in the Long Description field, put a short explanation, like, "Was June 4" or "Was Diff. C" etc., at the beginning of the description. These steps will save you some phone calls and confusion among the trip participants later.

If you can't lead your trip and get a **substitute leader**, a Scheduler in your Group can change the leader, or call or email the office (cmcoffice@cmc.org) and we can do it from here. We will note, "NEW LEADER" in the title field, and "Was Jane Doe" in the Long Description field.

If you need to **cancel your trip** altogether, put "CANCELLED" or "CANCELLED, NEED SUB" in one of the three Trip Title fields, then go down to the bottom of the screen and hit the "Cancel the trip" button. **CAUTION:** If you have names on your roster, print it out before cancelling your trip. *Once you hit the CANCEL button, it will remove the roster forever!*

## Trip Confirmation

The system allows you to confirm your trips 30 days in advance or less. If you need to confirm them earlier, call the office, and we'll do it for you from here. Until you confirm your trip, it will show "**It is too early to register for this trip, please check closer to the trip date.**" in RED under your trip description, so even if your trips are always "Register with Leader," it's a good idea to confirm them so people know they can call you to sign up.

1. In the upper right-hand corner of the screen, select "LEADER."
2. Find your trip, and select "EDIT."

### For Register with Leader trips:

1. For Denver Group Trips: Check the "Register with Leader" box (towards the bottom of the EDIT screen). Time/place, etc., are optional for your information only, as they won't be visible online.
2. Fill in the number of participants you're willing to take.
3. Hit "CONFIRM." This will add a ROSTER to your trip, and allow you to enter in people's names as they call. See #3 under Trip Report Instructions for more on how to do this.

### For Online Registration:

1. Enter all the info: where, when, how many participants, special instructions, LIT?, etc. Note: the leader is counted as a trip participant, so include yourself in the count.
2. For Denver Group more advanced trips (C & D hikes, Easy III, Mod & Adv Backcountry Ski trips), enter in a password in the Pass Code box. Passwords also allow Leaders from other Groups to enable people to sign up for their trips online.
3. Hit "CONFIRM," and you're done! This will add a ROSTER to your trip, and enable people to sign up online.

Once you've confirmed a trip, you can **check the roster** every few days to see who's signed up.

**"CLOSE" your trip** the afternoon or evening before at the bottom of the EDIT screen. Or, let the system close your trip automatically for you at midnight, before your trip, then print out your roster in the morning. No one can sign up for the trip online after you've closed it, although you could add them, yourself, if they call you.

**If you have a waitlist**, print out your roster several days in advance, and then the evening before so you can see who cleared. The system emails those who clear, but it doesn't hurt to call them anyway, in case we have a wrong email address for them, or if they don't check email daily.

**Print out your roster** by clicking on the "EXPORT ROSTER" button above your name. This will open up a Word document, and show you who's a Trip Leader; and their hiking and skiing classifications, if any; as well as if they'd like to ride or drive. Print it like any Word doc.

**Regarding Pass Codes:** The password allows those who don't have the Denver Group advanced hiker or skier classification needed to sign up after the Leader has had the chance to talk with them. Those with advanced classifications shouldn't need the password, for instance a "C" hiker can sign up for a "C" trip without prior approval. You can either sign people up on your roster yourself, or give them the password to sign themselves up with. (Hint: some Leaders use the same password for all their trips, and tell folks that if they've hiked with them to feel free to sign up for future trips with the same password, anytime! They just need to talk to them once.) **Passwords also allow online signup for other Groups' trips.** If you don't want people calling you for the password, include it in the "Long Description" field of the trip. For instance, "The password is 123snow."

## Trip Report Instructions

### Your trip isn't done until it's "Complete!"

It's important that you complete this step to allow us to evaluate our trips as a club; to ensure that you're covered under our Trip Leader Liability Coverage in case of an accident or incident report; and so we can report numbers of participants to the Scientific and Cultural Facilities District (SCFD), which gives us funding based on the numbers of participants we serve. Since our trailheads don't have turnstiles on them, we're relying on you for accurate and timely information.

1. Click on "LEADER" in the top right hand corner. This will display three months of your trips: one month back, and two months ahead, and show you the "Status" of each of your trips. If your trip is CLOSED, you still need to enter in a trip report, which will change it to COMPLETE. If you want to see more than that three-month window (for instance, your trips six months ago or six months from now), expand the beginning and/or ending date ranges at the top of your trip list, then press SEARCH.
2. Select your trip, and click on "ROSTER".
3. Here you can add members, put them as no shows, cancel them off the roster, and even make notes on an individual member.
  - a. To add members by membership number, enter in their number in the "id #" box, then click on the "person head" icon.
  - b. To look them up by name, click on the "LOOKUP" button, enter in part of their name, then "SEARCH." If they have a nickname (is it William, Bill, or Skip?) or strange initials, just use their last name. When you find them, click on their name, underlined in blue, select their carpooling choice (whether they rode or drove or called you to make special arrangements), and add them to the roster.
  - a. To delete people from the roster, click on "DELETE" on the right, under the green box that has their name. Use this for people who have called you to cancel in advance.
  - b. You can add "Notes" about a participant, like, "Leadership potential," or "Great hiker," or "Knows wildflowers," "Potential First Aid Instructor," etc.
4. Fill out any information in the appropriate boxes below the roster:
  - a. Incident/Accident Box: check if applicable, and fill out the Accident/Incident form (go to "Leaders Information" in the left-hand column of the Members Pages) to turn into your Group leadership and to the office in Golden.
  - b. Activity Hours: trailhead to trailhead
  - c. Trailhead Location:
  - d. Describe Access Problems:
  - e. Narrative:

5. At the bottom of the page:
  - a. "SAVE" This also allows you to save what you've done, and come back to complete it later. This does not change the trip status from CLOSED to COMPLETE.
  - b. "ACTIVITY REPORT COMPLETE." (You have to hit "Save" first, before "Activity Report Complete" or it will wipe out everything you just entered!) This will change the trip status to COMPLETE.
6. If your trip was CANCELLED, a trip report isn't necessary, and won't be saved. If your trip only had two or three participants, and wasn't an "Official Trip," a trip report isn't necessary, and won't be saved. An official CMC trip needs at least four people, including the Leader.
  - a. Backout to the "EDIT" screen, then hit the "CANCEL THE TRIP" button at the bottom of that screen.

There is no need to "send" your trip report, it's just there in the system. We'll pull it up if we need to!

Call the office anytime, and thanks again for all you do!