AMC Boston Chapter
Hiking/Backpacking Committee

Online Event Registration System
Leader Guide

April 2011

Welcome

Welcome to REGI: the new online event registration system for the Appalachian Mountain Club Hiking/Backpacking Committee of the Boston Chapter. The new system allows you to manage screening and trip registration using an online interface. It also keeps all of your events/trips and participant information in one, easy-to-access place. In addition, the tool allows participants to enter their profile information once and reuse the same information to sign up for multiple events.

Create Your Account

Step 1 Go to the login screen at
http://www.hbbostonamc.org/eventregistration

Step 2 Click the link that says "create a new account here."

Step 3 Enter your information as requested, starting with the required fields (user name, password, first/last name, email) and click the "New Profile" button.

Note that you can return to edit your profile at any time by clicking on "My profile" in the navigation bar at the upper right of every page. You can update your profile at any time. *Please do not to create more than one online account.*

IMPORTANT: Once you've set up your profile, please send an email to amcbostonhbs@gmail.com. This is a user support email for the new registration system. One of the online support volunteers (currently Abby Driscoll and Julie LePage) will get back to you as soon as possible to upgrade your status from USER to LEADER in the registration database. This only needs to be done once per account. Once this is complete, you will have the ability to create new trips in the system.

Forgot password

There is a 'forgot password' link on the front page you can use to send yourself your password if you forget it. If you use it, be advised that the email may be in your spam box. The email will come from
AMC.Trip.Registration@srv02.lyonshost.com

Entering a New Event

To set up the registration for a new event or trip, log in and click the "New Event" link on the navigation bar at the upper right. You are now in the Event Admin screen, which is only available to leaders. Supply information about the trip. The following fields will be visible to all participants: "Event Name", "General

Description", "Gear List," and “Confirmation Page.” The Confirmation Page displays information participants will be directed to once they register for a event. "Participant Info" will only be visible to participants who have been **approved** for the event, so this section is ideal for such information as meeting place and time, getting to the trail head, etc.

Please note: be sure to include the DATE(S) of the event in the trip title.

Please also be sure to include any COST associated with the event in the Generation Description section.

The default “Event Status” when you create a trip is “OPEN”. This status means that, if users click on your registration link, they will be allowed to register. If you wish to defer the opening of registration, set event status to "PENDING", which prevents new registrations, and update it to “OPEN” later. “WAIT LIST” will allow registrants to register, just like “OPEN”, but lets them know that the trip is already full. All other statuses (“FULL”, “CLOSED”, “CANCELED”) do not allow new registrations.

Applicants are automatically asked if they have the required gear, questions or comments, and carpool details. You can ask up to 2 additional custom questions for the trip, by typing them into "Trip Question 1" and "Trip Question 2."

Program Info

Assuming your trip is NOT part of the H/B Spring Hiking Program or Winter Hiking Programs, set "Is this event a program?" to "N" (NO, this is the default), and leave the program ID box blank.

If your event IS part of either the H/B Spring Hiking Program or Winter Hiking Program, you will be provided with the Event ID of the program. Set "Is this event a program?" to "Y" (YES), and enter the Program ID. If the event is part of a program and a program id is entered, the event will be listed under the program and leaders will be able to view the participant’s program status from within the event (ie. leaders can see whether trip applicants are enrolled in the program).

Payment

Payment is not currently handled through the system. The current recommended process for paid events is to handle payments directly with participants. In the case of H/B sponsored programs (WHP, SHP, SLP, WFA), a PayPal account will be made available.

Finish and Publicize

Click the "New Event" button to create the Registration Page. You will be returned to the same page with one additional field: "Registration URL", listed right beneath the event name. This is the URL registrants will click to register for your event.

IMPORTANT: Copy this link for inclusion in the event listing. Do NOT use the admin link at the top of the page or the registration link in the browser window. At any time, you can return to the trip administration page and make any updates to the event (go to your "My Trips" page and click the red "[Administration Page]" link for the event).

Processing Sign-ups

Each time a participant registers for your event, all leaders and co-leaders for that event will receive an automated email notification (sent to your profile email address). This email will include a link to the registration site. You can also login to the site anytime to change the enrollment status of participants.

Go to your "My Trips" page and click the red "[Administration Page]" link for the trip. On the top of the form there is a link "Jump to Sign Up Sheet," which you should click to be taken to the bottom of the same page, where you will now find a table of applicants to your trip. Screen the people with status "SUBMITTED." As you screen registrants, you may change their status to: APPROVED, WAIT LIST, or CANCELED.

IMPORTANT: You must click on “Update Sign Up Sheet” at the bottom of the page each time you want to make changes to participants’ enrollment status.

Other trip leader/co-leader registration

Fellow co-leaders and registrars must register like all other registrants. Log in to the system and go to the ADMIN page for the event. Using the pull-down menus to the far right of each person's entries, change their status by selecting either LEADER, CO-LEADER or REGISTRAR. When you change the status of a participant, they will be sent an automated email notifying them of the change. Leaders, Co-Leaders and Registrars all have access to the ADMIN section of the event registration page.

Notes Section

You may use the notes section to provide information on screening, contact with participants or payment for participation in a program or a event that requires payment. To save changes to Registration Status and Notes, click the button "Update Signup Sheet." at the bottom of the page.

Changing the Status

You can stop accepting applications by setting "Event Status" to “FULL.” This will prevent future sign-ups. As noted above, setting the trip to “WAITLIST” will allow participants to register and for you to accept them if there are cancellations. Therefore, this will be the most common selection once a event fills since cancellations are not uncommon.

Editing Event Information

You can also edit any of the other event info at any time. Click the "Update Event" button to save any changes to the fields above it.

Info Sheet

To print participant summary information to take on the trip, click the button "Export Info Sheet." The file generated is a tab delimited table with the default name tripInfoSheet.txt Most leaders will be using Microsoft Excel to open the document. This will allow you to sort the list by registration status, last name, payment status, etc. This will also allow you to select the participant email addresses to email the "poop sheet" prior to the event. For questions about the Info Sheet please contact amcbostonhbs@gmail.com

About the Software

The registration site is currently hosted on the http://www.hbbostonamc.org server. The application was developed in LAMP (Linux, Apache, MySQL, PHP) and HTML by Dirk Koechner, a long time AMC Boston chapter member and outdoor enthusiast.

FAQ's:

Question: Once I create a event in the new system, how do I get it posted to outdoors.org and included in HB Announce?

Answer: You will need to first set up a Registration Page as listed above, and then go to the AMC's Trip Administration Tool to post your event into their system at: http://trips.outdoors.org/index.cfm/method/trips.showlogin Copy & paste your new event Registration Link in the field that says "Include web link(s) in event description:", located near the bottom of the page.

For instructions on posting an event on outdoors.org, view the "Posting a Trip" page on H/B's website at: http://www.hbbostonamc.org/index.php/Table/Online-Trip-Posting/

Question: What is the easiest way to email all participants on a trip?

Answer: Go to the [Administration Page]" link for the event and click the "Export Info Sheet" button. This will give you a sortable spreadsheet. You may want to sort the list by STATUS before copying and pasting the correct email addresses.

For other questions please contact amcbostonhbs@gmail.com