APPALACHIAN MOUNTAIN CLUB

AMC Activity Listings: Chapter Trip Contributor User Instructions: Trip

Adding/Editing/Updating/Managing

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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.

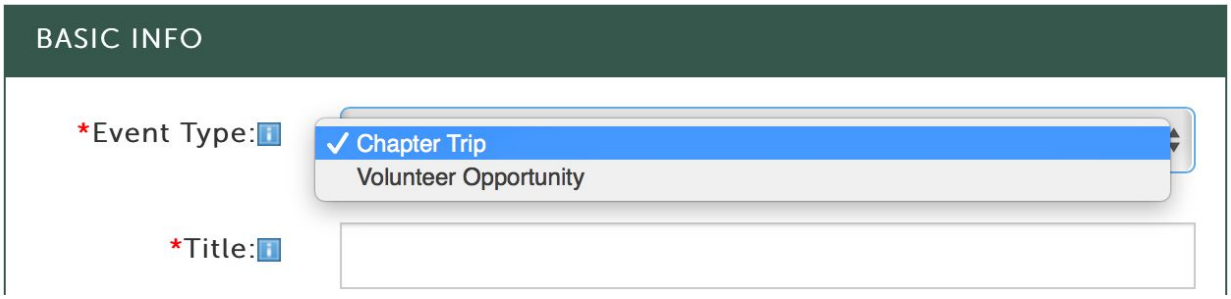
The application offers a workflow that allows volunteer committees to create an electronically managed approval process based on the following structure:

- 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.

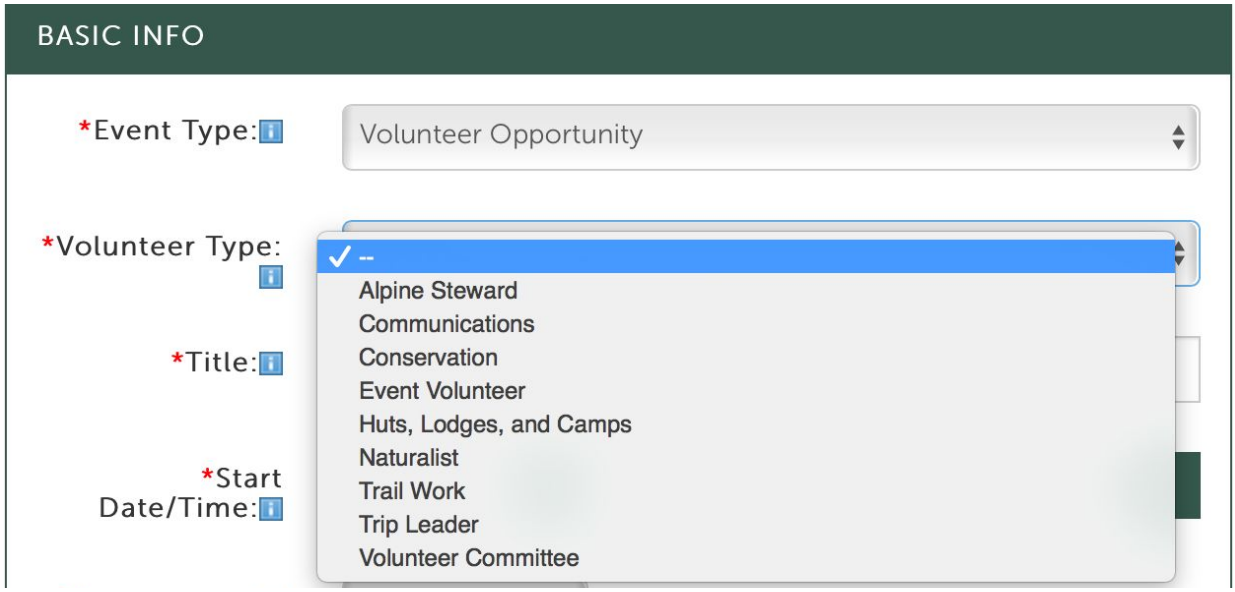
Adding a New Volunteer Opportunity

When entering an event into the activities database you can select one of two event types: Chapter Trip or Volunteer Opportunity.

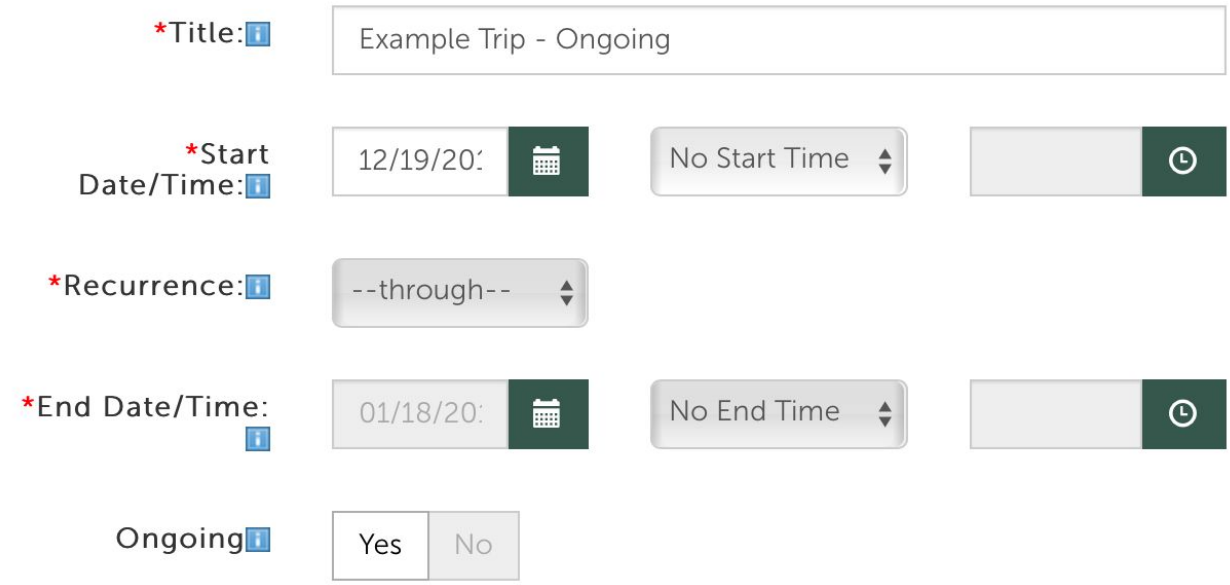


Chapter trips will only show up under the Activities tab, and volunteer opportunities will only show up under the Volunteer Opportunities tab on the Activities Database search page.

To enter a Volunteer Opportunity, select “Volunteer Opportunity” in the Event Type field and then select a Volunteer Type from the drop down menu. Options for Volunteer Type are: Alpine Steward, Communication, Conservation, Event Volunteer, Huts Lodges and Camps, Naturalist, Trail Work, Trip Leader, and Volunteer Committee.



Volunteer Opportunity listings may be designated as “ongoing”—this means that the Volunteer Opportunity is not date-specific. Ongoing Volunteer Opportunity listings will remain active for 30 days with the option to renew the listing 7 days before the trip expiration dates. This is to ensure that volunteer opportunity listings are up to date.



Note: only Volunteer Opportunities can be designated as “ongoing.”

To list an ongoing volunteer opportunity, select “yes” next to Ongoing - found under the trip end date. If you select a date for your trip to start and then select “Yes” for Ongoing, an end date for your listing will automatically add an end date that is 30 days after the start date.

Seven days before this “end date,” you will receive an email asking if you would like to renew your Volunteer Opportunity listing for another 30 days. If you click the link in the email and then

log in to the Activities Database, your trip will be extended for an additional 30 days. If you do not click on the renew link before your trip expires, your listing will be archived on its end date. Archived ongoing volunteer opportunity listings will be able to be renewed as needed.

To re-list an archived ongoing volunteer opportunity, use the “renew” link next to the expired opportunity. Renewing extends the event for 30 days from today and puts it back in the live feed. Alternatively, you can use the “reactivate” link. Reactivating events has not changed. Reactivation makes a copy of the event which you can then edit and submit for approval via your chapter’s/committee’s regular approval workflow.

To renew or reactivate an archived ongoing volunteer opportunity, search for archived listings in the admin search, click on the yellow “more” button to see an option to find “Ongoing Volunteer Opportunities only.” You will see the archived listings presented below the search fields:

To “reactivate” the listing, click the “reactivate” link.
To renew the listing, click “Change Status”. You will be taken to the change status page, change the trip status to “Open”. Once you do this the archived trip listing options will change to this:

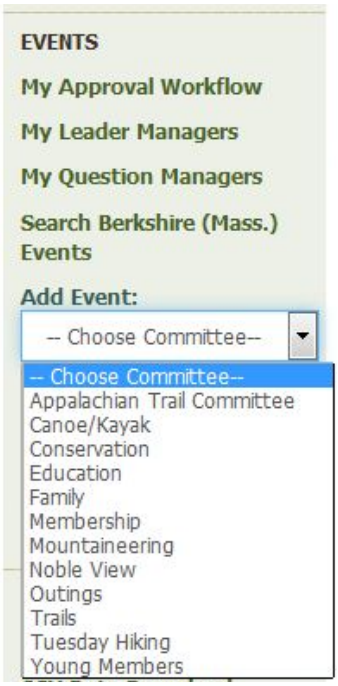
Click renew for the archived trip listing to be pushed to the live site. Click the renew link to the right of the listing you want to renew and it will become active for another 30 days.

If a live ongoing volunteer opportunity is no longer open or available (i.e. if a committee chair position has been filled), change the status to “Full (F)” and it will take it off of the live listings. For detailed instructions and screenshots on updating the status of your listing, see page 29.

The rest of the steps for entering a volunteer opportunity are the same as those for entering a chapter trip—see below for detailed instructions on the remaining steps.

Adding a New Event/Trip

*To add an event/trip listing, navigate to the Activities Admin. From the left sidebar under the **EVENTS** section you will see Add Event. Note: You can now change the event/trip type (Chapter Trip or Volunteer Opportunity) on the event entry screen, so there is only one dropdown option under "Events."*



Before you begin adding a trip/event listing, make sure to have all necessary information prepared. This will help speed up the process.

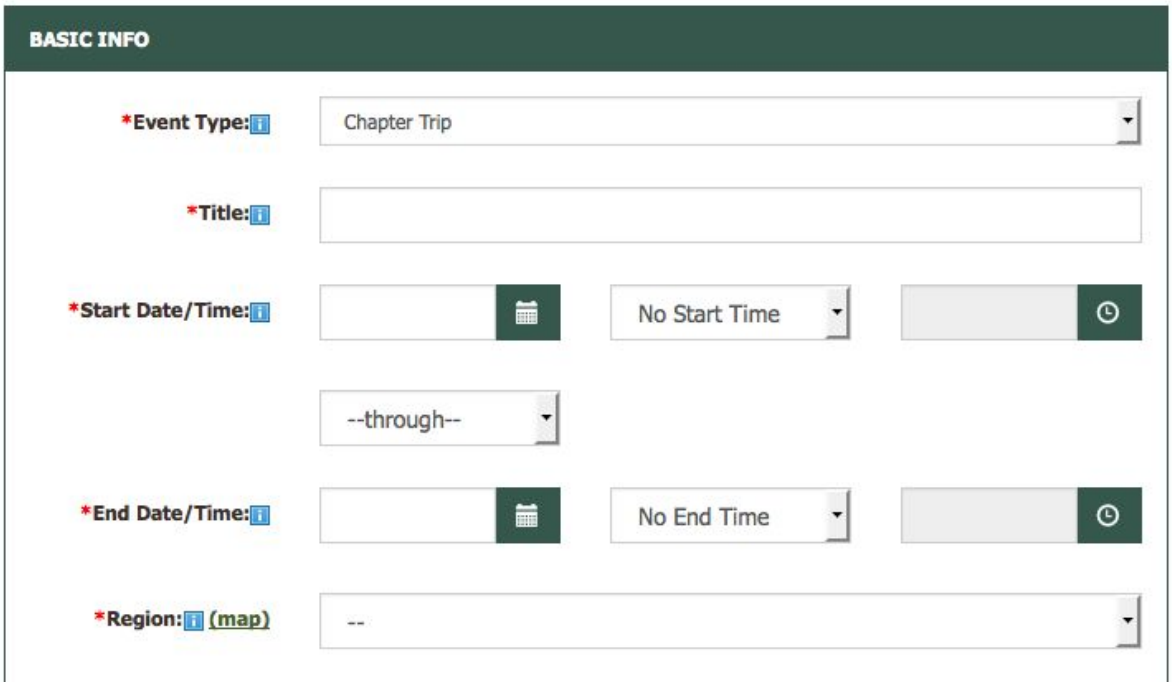
Select a committee from the dropdown for which you'd like to add a trip. Once you've selected a committee, the page will reload with the event entry form.

The entry form has been reorganized to simplify the trip entry process. Fields have been grouped into sections with those containing required fields displayed and those containing optional fields collapsed by default.

*Note: Next to each field title is a blue box with an **i**; hovering over these boxes will produce a pop-up explanation of each field.*

Basic Info

The following images and tables describe each form field and its purpose. Required fields are marked with a red asterisk on the form.

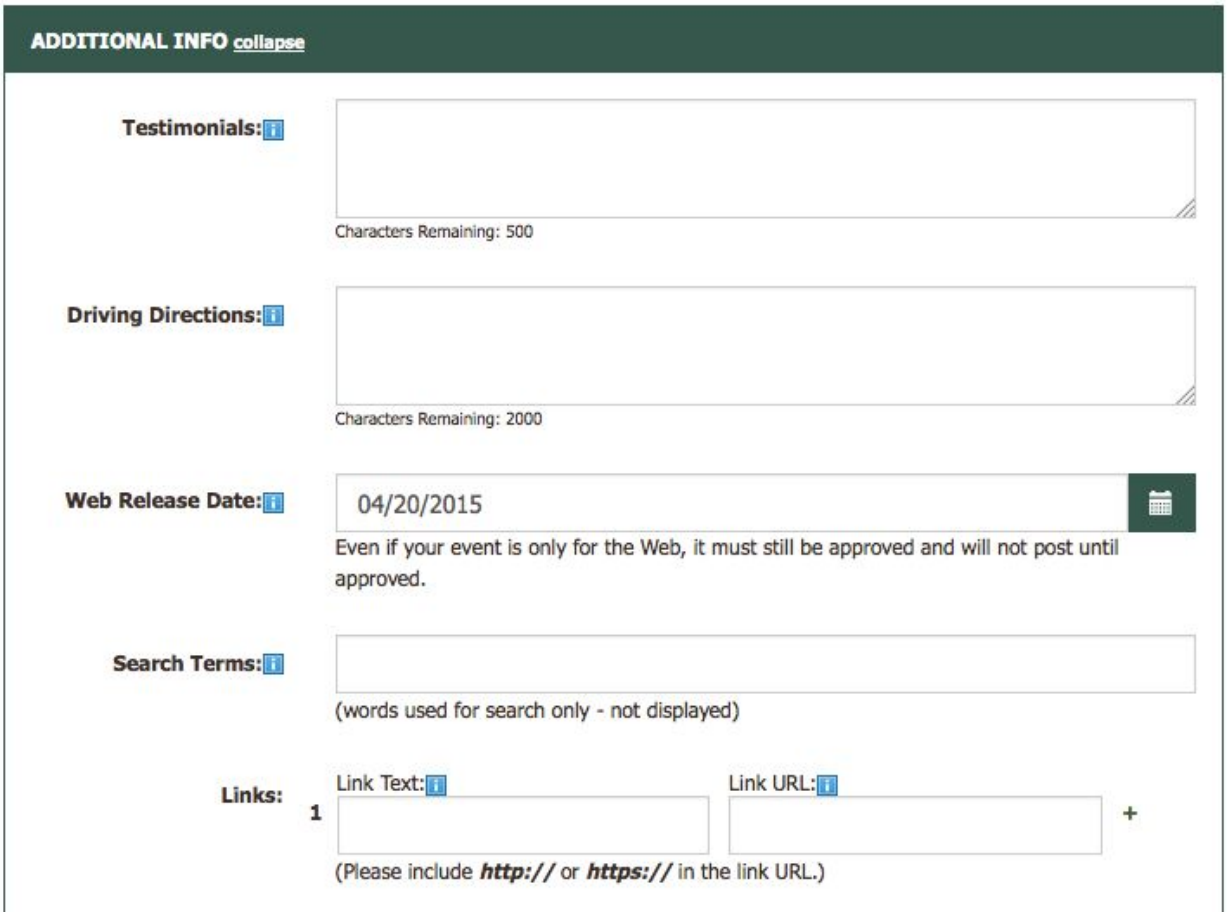


Event Type	The type of event/trip being listed (Chapter Event/Volunteer Opportunity).
Title	Free form text header for the event/trip listing.
Start Date/Time	Start date for the event. The start time is optional. Change "No Start Time" in the dropdown to "Use Start Time" and the time field to the right will be enabled. Click the time field to open the time picker and chose the applicable time.
Recurrence	Allows for creation of a single or weekly recurring event. Single Event - Enter Start Date/Time and End Date/Time and leave this box set to "--through--". Weekly Recurring Event - Enter Start Date/Time and End Date/Time and choose the day of the week for the recurring event. An event will be created for each occurrence of a day (ex. Each Monday) between your start and end dates. *Note: Recurring events create separate copies of the event on the appropriate dates. If you need to update all occurrences of an event, you will need to update each individually.*
End Date/Time	End date for the event. The end time is optional. Change "No End Time" in the dropdown to "Use End Time" and the time field to the right will be enabled. Click the time field to open the time picker and chose the applicable time.
Region	Required drop-down of the region in which an event/trip will take place.
State	Required drop-down of the state in which an event/trip will take place.
Country	Required drop-down of the country where an event/trip will take place.
Activity	Required selection box indicating the activity of an event/trip. Multiple activities can be selected by holding down the "CTRL" key while clicking different options.

Listing Type	Indicates if a listing will appear on the Web or both the Web and as an Advance Notice trip in the Magazine. (see below for restrictions) *Advance Notice trips must be multi-day, open to all, have clubwide interest, and require a financial investment.* Trips that do not meet these criteria must be okayed by your chapter/committee Approver. Advance Notice events are included in the magazine one issue earlier than the trip date(s). For example, May/June Advance Notice trips would be due to the Magazine Department by January 15th and could appear in the Mar/Apr issue. Editors reserve the right to edit these trips to ensure maximum inclusion of events.
Advance Notice Magazine Description	Free-form text description to be included in *print publications.* (60-word max)
Magazine Issue(s)	The issue of AMC Outdoors a listing will be printed in (if applicable).
Web Description	Free-form text description (450-word max) of a listing on the web.

Additional Information
Collapsed by default

Click the "expand" link to view this section.



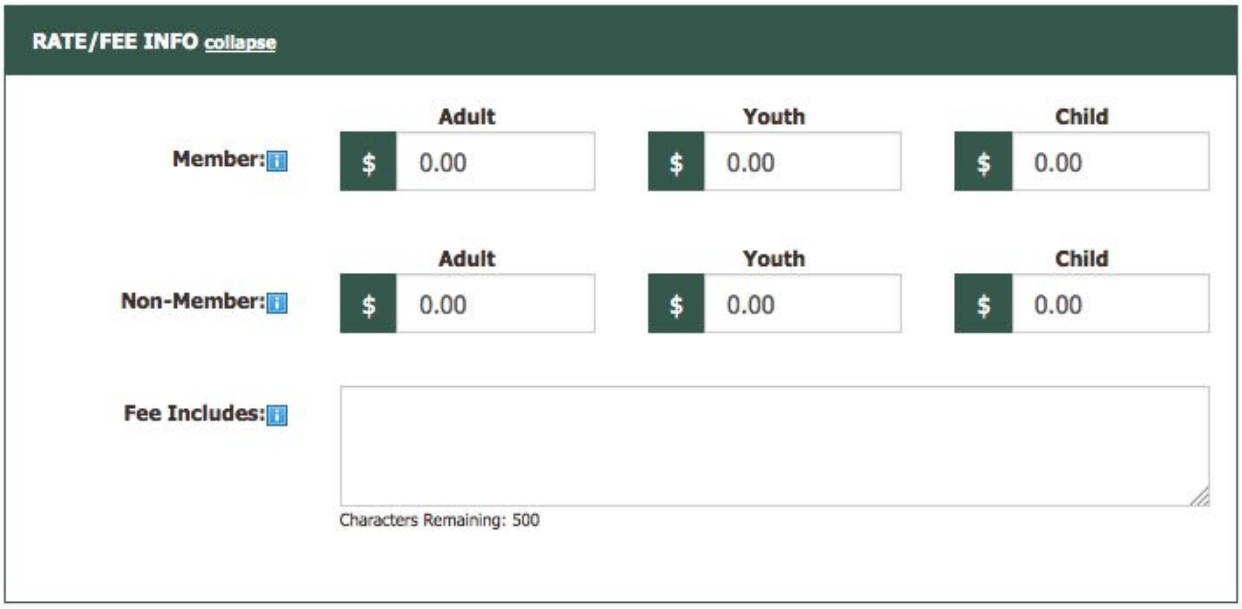
Testimonials	Free-form text area for adding past participant testimonials of an event on the web.
Driving Directions	Free-form text area for step-by-step driving directions on the web.
Web Release Date	Required date field for setting the date a listing will appear live on the web once approved. Prepopulated to the current date. It will not be displayed on the web until it has been approved.
Search Terms	Optional free-form text box for adding keywords to help users find listings in a search.
Duration	Optional field **only displayed for Volunteer Opportunities**. Indicates the time commitment needed from the volunteer.
Link Text	Optional free-form text box for adding external links to a listing. Maximum 6 links per listing.
Link URL	Optional free-form text box for adding clickable links to a listing. Maximum 6 related links may be added. **Must include *http://* to make links active**.
Special Designations	Optional checkboxes that allow you to designate a trip for special treatment in *AMC Outdoors* Backcountry. Advance Notice submits a trip for inclusion in the magazine one issue earlier than typically allowed and is only for multi day trips
Location	Optional upload for adding a single image to an event/trip listing (must include a caption).

Latitude/Longitude	Optional fields. These fields are populated by using Google Map's pinning functionality. Click on the map icon to open the Google map dialog. If the Location field (an address or a name of a park) is populated and the Latitude/Longitude fields are not, the map will try to use the Location field to pin a location on the map and estimate GPS coordinates. If the pin isn't in the correct location, you can click once on the map with the cursor to put the pin in the right place. When Latitude/Longitude coordinates are specified, the public search details page will display a Google map and pin along with a button link to Google Maps for driving directions. Google Maps driving directions will use the latitude/longitude as the end point and a location lookup of the user's IP address to make a best-guess for the start point of the driving directions.
Difficulty	Optional form field only displayed for Chapter Trips indicating the difficulty of an event/trip
Nearby AMC Destination	Optional selection of an AMC Destination close to an event/trip.
Audience	Optional field only **displayed for Volunteer Opportunities**. Indicates which audience(s) is appropriate for this event/trip.
Trip Photo	Optional images related to this event. You may choose from your previously-uploaded images or upload a new one.

Rate/Fee Info

Collapsed by default

Click the "expand" link to view this section.



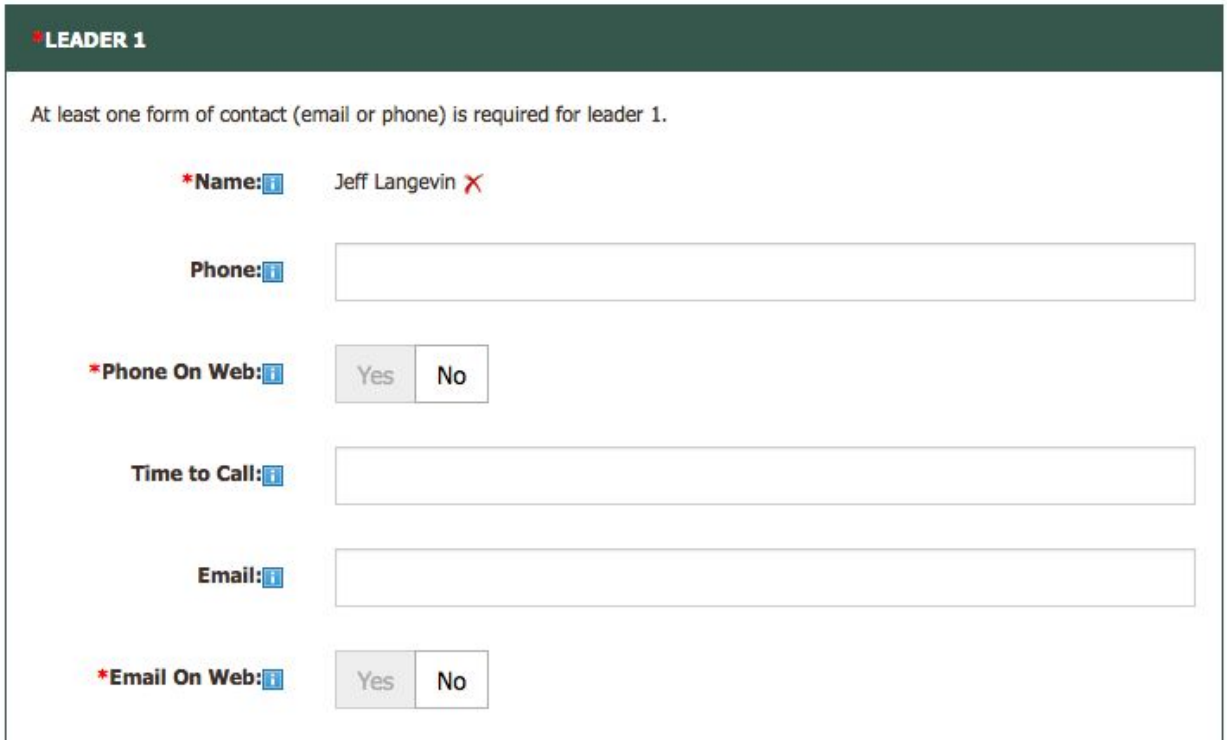
Rates/Fees	Optional fields for fees associated with the event/trip.
Fee Includes	Optional free-form text field explaining the event/trip fee.

Leader Information

In August 2012, the trip listing process was updated with the launch of the Leader Member Validation Project, which requires users to select from a list of approved trip leaders when entering a new trip. These changes are meant to ensure that the leaders on every AMC trip are current members, as well as to simplify the entry of leader information when posting a trip.

*In the **Name** field of the Leader Information section, begin typing the name of a Valid Leader set to lead the trip/volunteer opportunity. A blue pop-up with the leader's information should appear (image on right). Clicking on a name in the pop-up will fill out the leader information fields, which can be edited.*

*Note: If a leader's information is added without clicking the blue pop-up, a trip will not post. If the wrong leader is selected, a red **X** next to the leader's name can be clicked to remove the leader.*



Name	Begin typing in the name field to search your Chapter/Committee Approved Leaders List. Select the appropriate leader to populate the rest of the fields. You can then edit the fields as needed.
Phone	Optional phone number for the leader (if a phone number is not provided, an email address is required for the listing).
Phone on Web	Optional checkbox to allow a leader's phone number to be visible on the web.
Time to Call	Optional time to call the leader if a phone number is provided.
Email	Options email address for the leader (if an email is not provided, a phone number is required for the listing).
Email on Web	Optional checkbox to allow a leader's email to be visible on the web.
Bio	Optional free-form text box for adding information about the trip leader.
Image	Optional image for this leader. You may choose from your previously-uploaded images or upload a new one.

Leaders 2, 3 and 4

Only the Leader 1 section is displayed by default. All other leader sections are initially hidden. Once you select a Leader 1, the Leader 2 section will appear collapsed. Click the "expand" link to display the Leader 2 fields. Each time you select a leader, the next leader section will be appear until all four are displayed.

Fields for leaders 2, 3 and 4 are the same as Leader 1 above.

Co-Leader Information

Similar to the Leader 2, Co-Leader 1 will be displayed once, Leader 1 has been selected. Co-Leader 2 will be displayed once you have entered a name for Co-Leader 1.

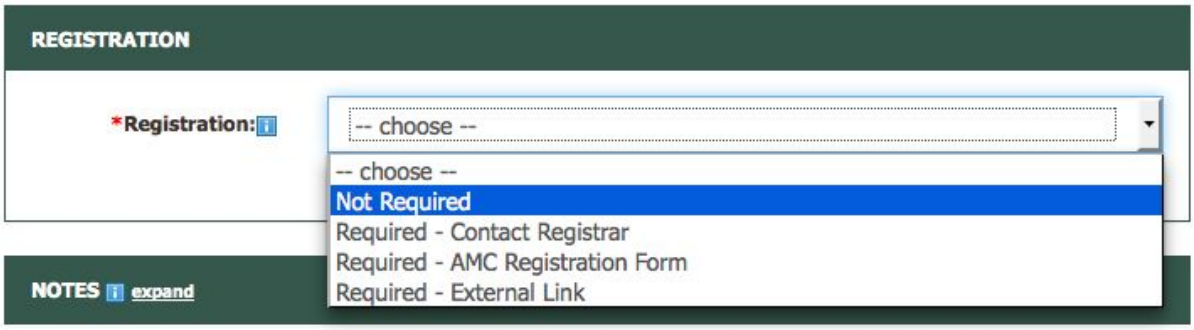
Note: Co-leader information is not required and does not follow the same membership validation process as Leader Information.

Name	Optional first and last name of the co-leader.
Phone	Optional phone number for the co-leader.
Phone on Web	Optional checkbox to allow the co-leader's phone number to be visible on the web.
Time to Call	Optional time to call the co-leader if a phone number is provided.
Email	Options email address for the co-leader.
Email on Web	Optional checkbox to allow a co-leader's email to be visible on the web.
Bio	Optional free-form text box for adding information about the trip co-leader.
Image	Optional image upload/selection for displaying a photo of the co-leader with the listing.

Registration – Not Required and Contact Registrar

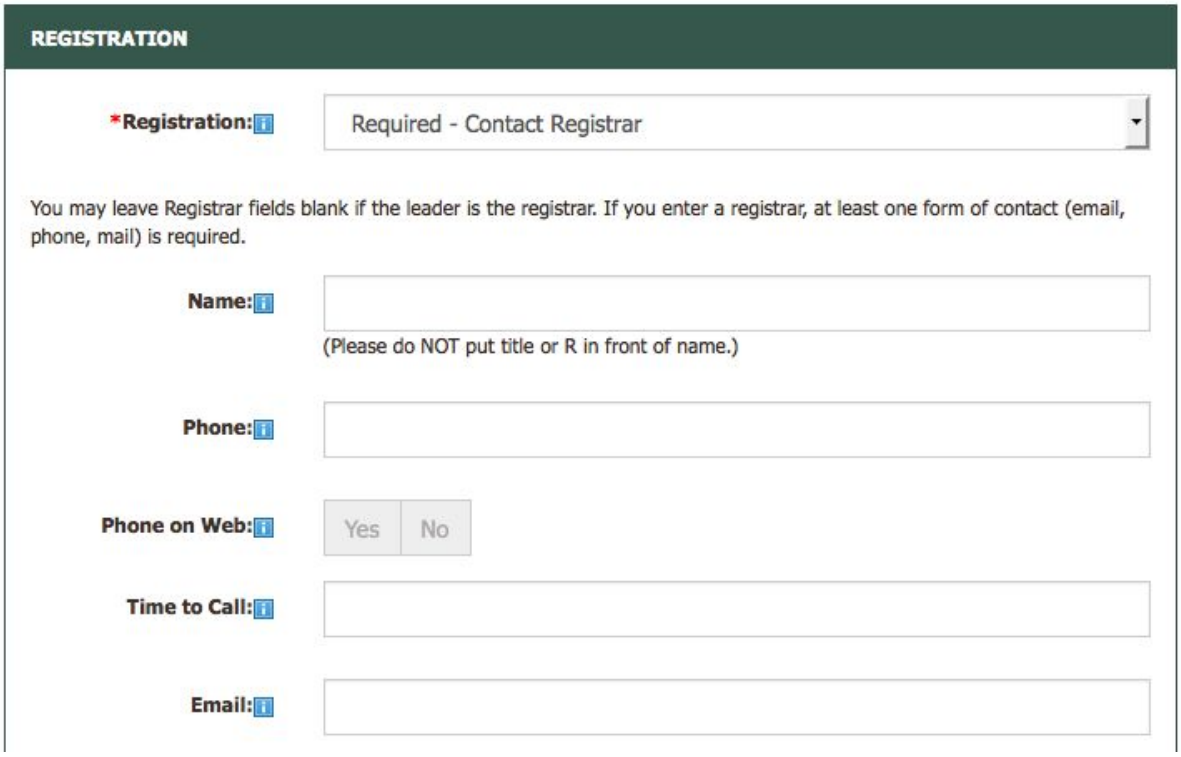
The registrar is an individual who will collect any money or registration information for an event/trip.

The Registration radio buttons have been replaced with a dropdown that has two new options. Previously, registration options were "Not Required" and "Required" with a number of optional fields for registrar contact information if a leader was not acting as registrar. "Not required" and "Required – Contact Registrar" options below correspond to the former radio button options.



Registration	Required – indicates whether registration is required and method of registration if required.

When "Required – Contact Registrar" is selected, the registrar fields will be displayed. The same rules apply as before. You do not have to enter a registrar if a leader will be handling registration. If you enter a registrar name, you will also have to enter at least one form of contact – Phone, Email, or Mailing Address.

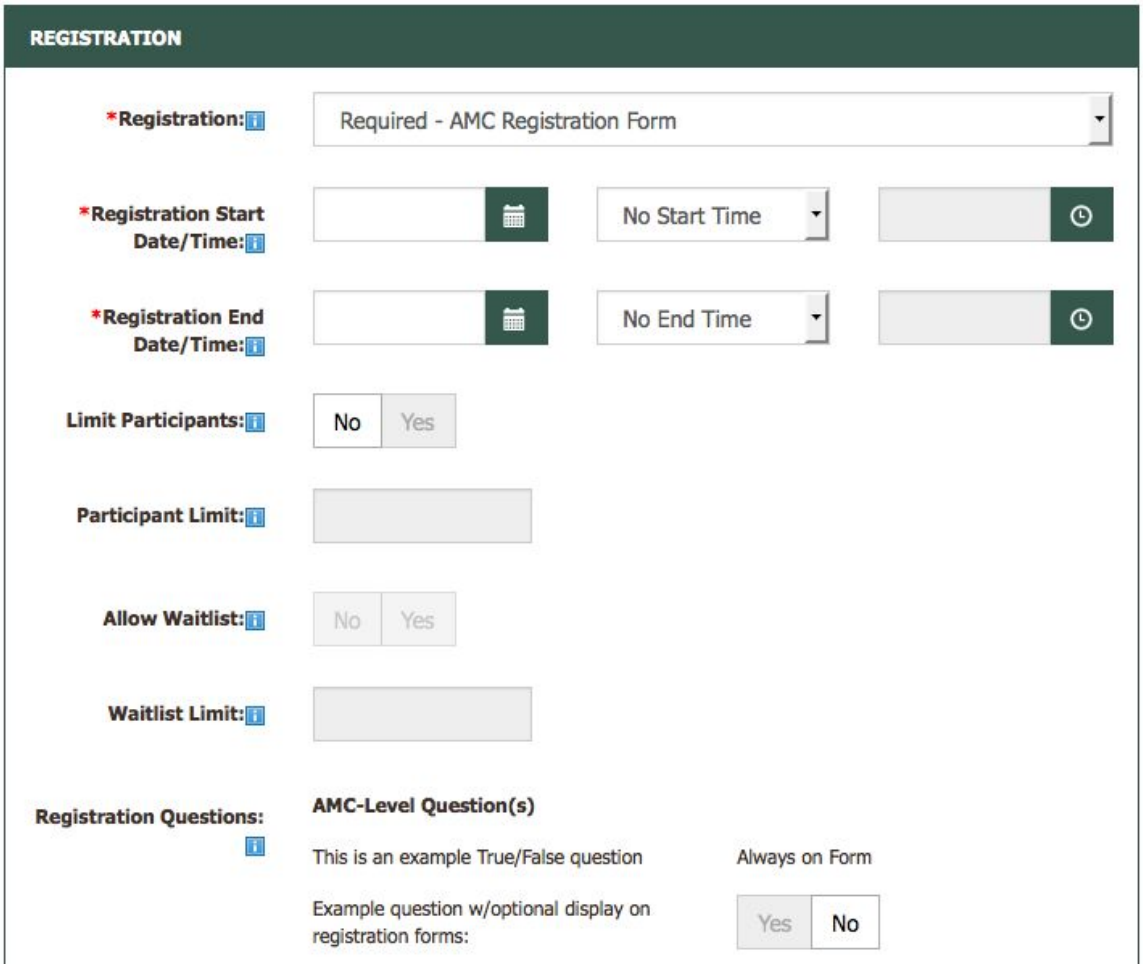


Name	Optional first and last name of the trip registrar.
Phone	Optional phone number for the registrar.
Phone on Web	Optional checkbox to allow a registrar's phone number to be visible on the web.
Time to Call	Optional time to call the registrar if a phone number is provided.
Email	Optional email address for the registrar.

Email on Web	Optional checkbox to allow a registrar's email to be visible on the web.
Address	Optional street address or PO box for mailing payments to the registrar.
City	Optional City of the address or PO box for mailing payments to the registrar.
State	Optional State of the address or PO box for mailing payments to the registrar.
Zip	Optional Zip code of the street address or PO box for mailing payments to the registrar.

Registration Required - AMC Registration Form

When "Required – AMC Registration Form" is selected, the new AMC registration form options will be displayed. The options include registration start and end, participant and waitlist limits and registration form questions.

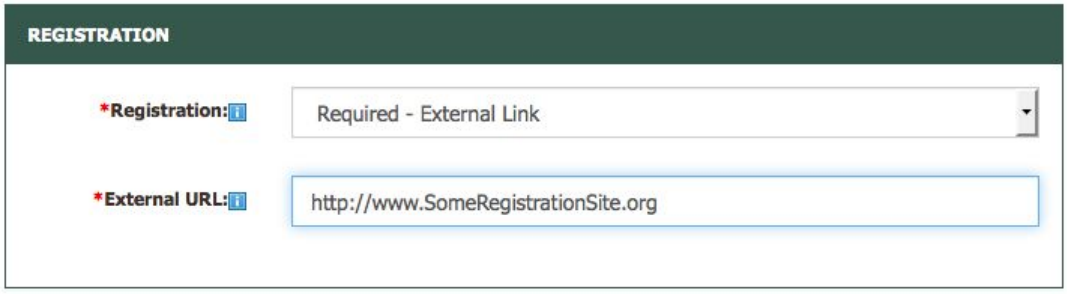


Registration Start Date/Time	The date to open registration. When no start time is indicated, registration will open at 12:00am EST on the Registration Start Date. When Use Start Time is chosen, registration will open at the time entered.
Registration End Date/Time	The date to close registration. When no end time is indicated, registration will close at 12:00am EST on the Registration End Date. When Use End Time is chosen, registration will close at the time entered. *Note: The registration end cannot be after the start date/time of the trip.*
Limit Participants	Indicates whether to limit the number of participant slots for this trip or not. No: There will not be a limit to the number of registrations submitted. Registration closes when the Registration End Date/Time passes. Yes: Registration closes and trip status changes to "Full" when the number of registrations **confirmed by a leader (or approver)** reaches the Participant Limit.
Participant Limit	The number of participant slots on your trip. This is disabled when Limit Participants is set to "No". Registration closes and trip status changes to "Full" when the number of registrations **confirmed by a leader (or approver)** reaches the Participant Limit.
Allow Waitlist	Indicates whether to allow a waitlist for this trip or not. Allow Waitlist is disabled when Limit Participants is set to "No". When the Participant Limit is reached, the trip status is changed to "Waitlisted". Subsequent registrations are automatically given a status of Waitlisted. Registration closes when the number of waitlisted registrations reaches the Waitlist Limit (or the Registration End Date/Time passes).
Waitlist Limit	The number of spots on your waitlist. This is disabled when Participant Limit or Allow Waitlist is set to "No". When the Participant Limit is reached, the trip status is changed to "Waitlisted". New registrations are automatically given a status of Waitlisted. Registration remains open until the limit of waitlisted registrations is reached (or the Registration End Date/Time passes).
Registration Questions	These questions assist Leaders in the prescreening and registration process. Inclusion of a question on the registration form falls into two categories: Not Optional: Designated by “Always on form” next to the question. This is configured by the **question manager** and cannot be overridden by the contributor on the trip entry form. Optional: Designated by a Yes/No toggle next to the question. Allows you to choose whether to include the question on the registration form. “Yes” will include on the registration form. “No” will exclude it from the registration form.

	Note: To view a list of your chapter's question managers, click the "My Question Managers" link in the sidebar.

Registration Required – External URL

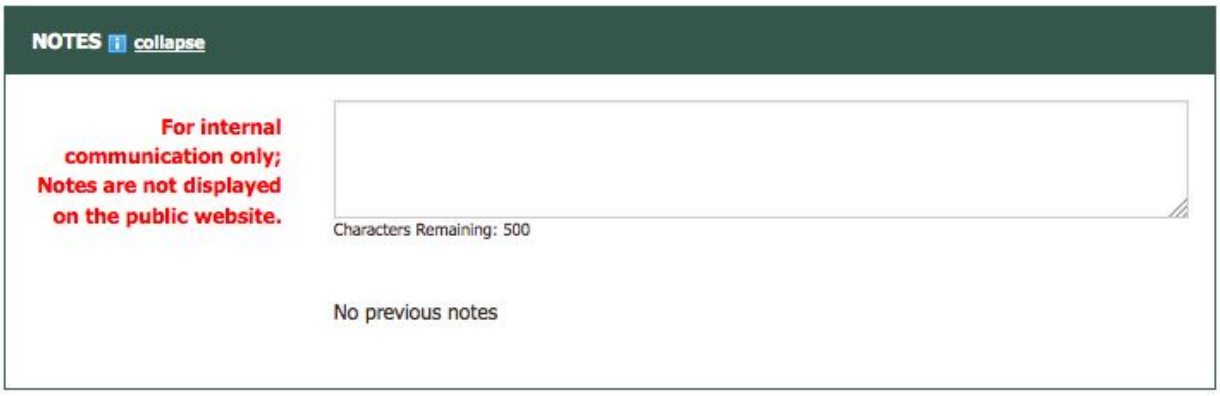
This registration option can be used by chapters with their own registration system. Enter the appropriate URL (include the http:// or https://). On the event details page the Register Now button will link to this URL.



Notes

"Notes" is an optional field and is collapsed by default.

Click the "expand" link to display.



Notes	Optional free-form text box to send internal notes to other users in the approval queue.

Approval

This option is only displayed for Reviewers and Approvers.

The separate checkboxes for web and magazine approval have been replaced with one toggle. This toggle will indicate your approval for both web and magazine (when applicable).

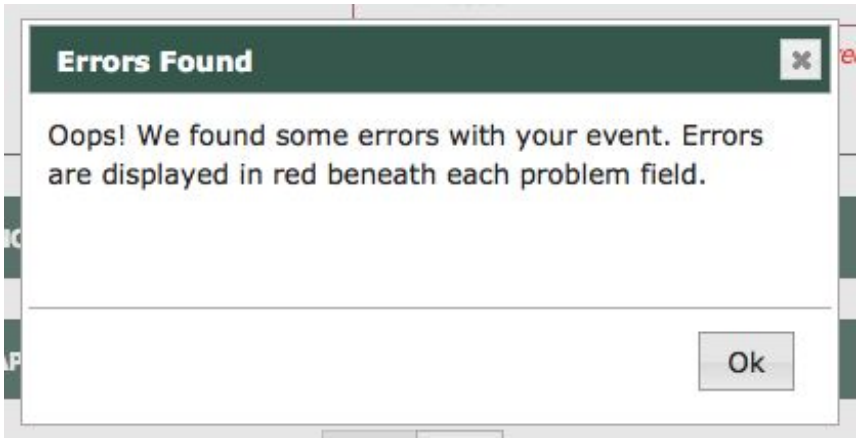
Note: For inclusion in AMC Outdoors magazine, Listing Type must specify inclusion in the magazine and Advance Notice criteria must be met. See Listing Type above for more information on criteria.

Approve	Toggle to indicate approval for both web and magazine.

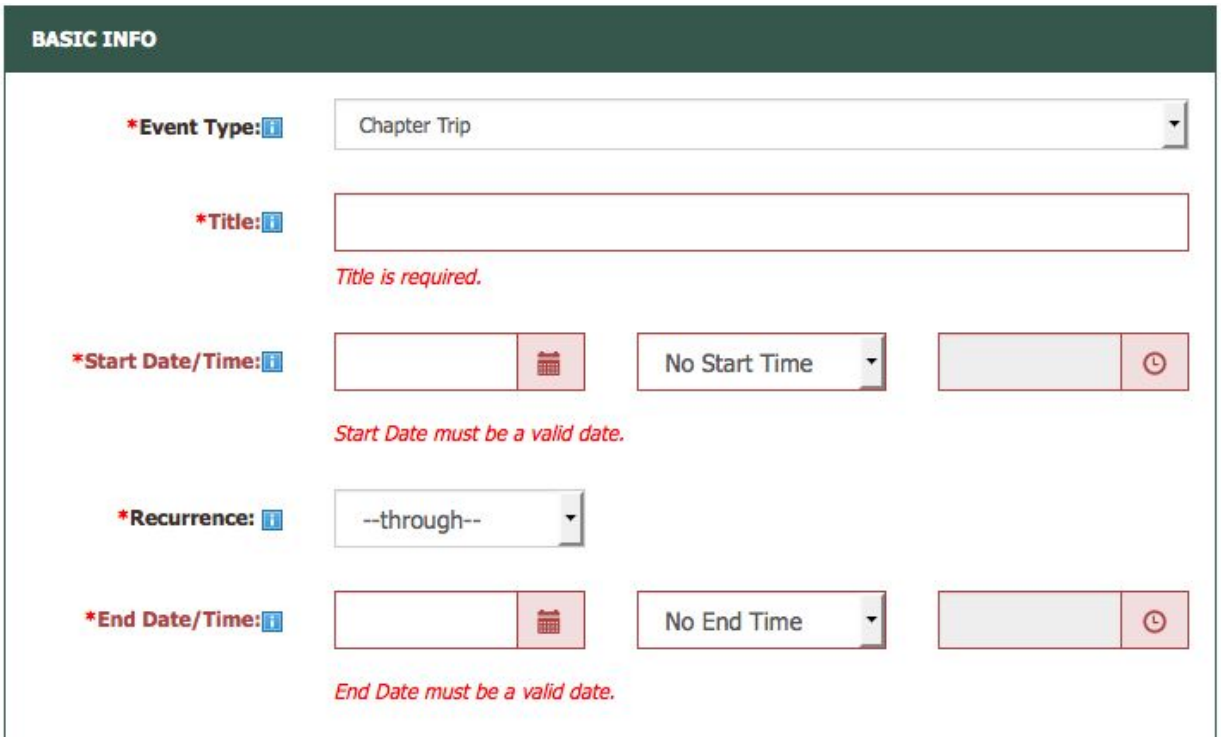
Submitting the Trip for Review/Approval

Once you have finished adding all necessary event/trip information to the form, click the Preview button at the bottom of the page.

Your form entries will be validated. If errors are found, you will see the popup below:

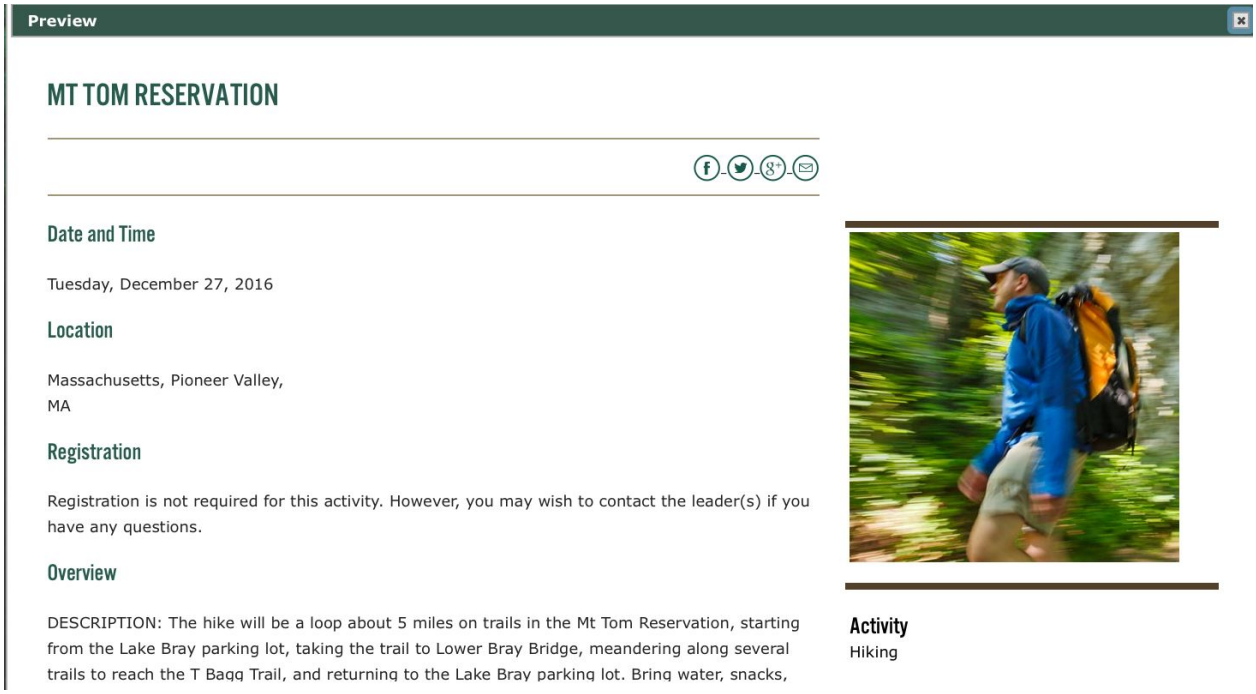


When you click “Ok”, the form will scroll to the first field with an error. Errors will be displayed in red below each field with an error:

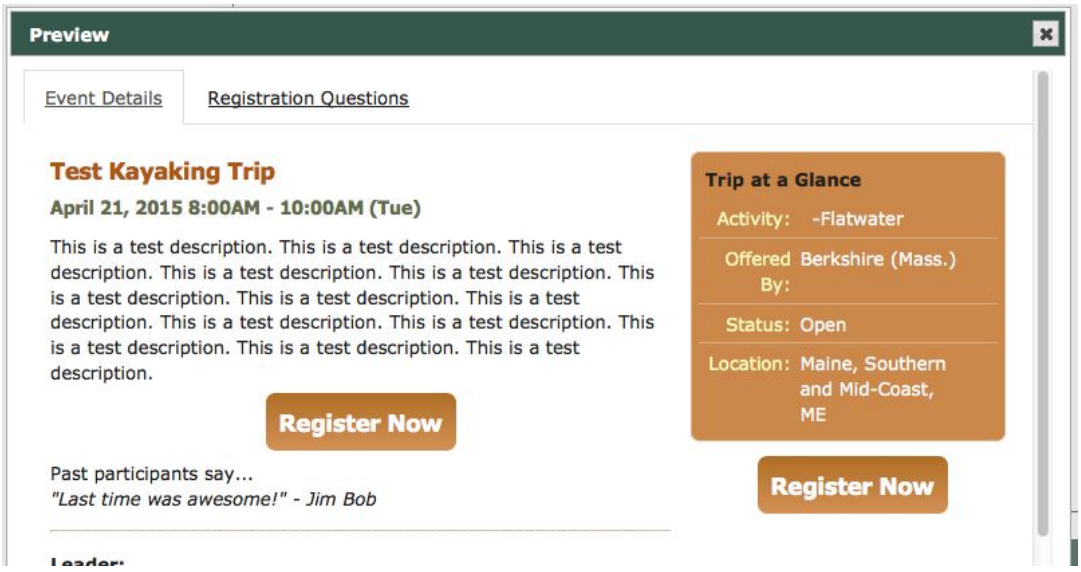


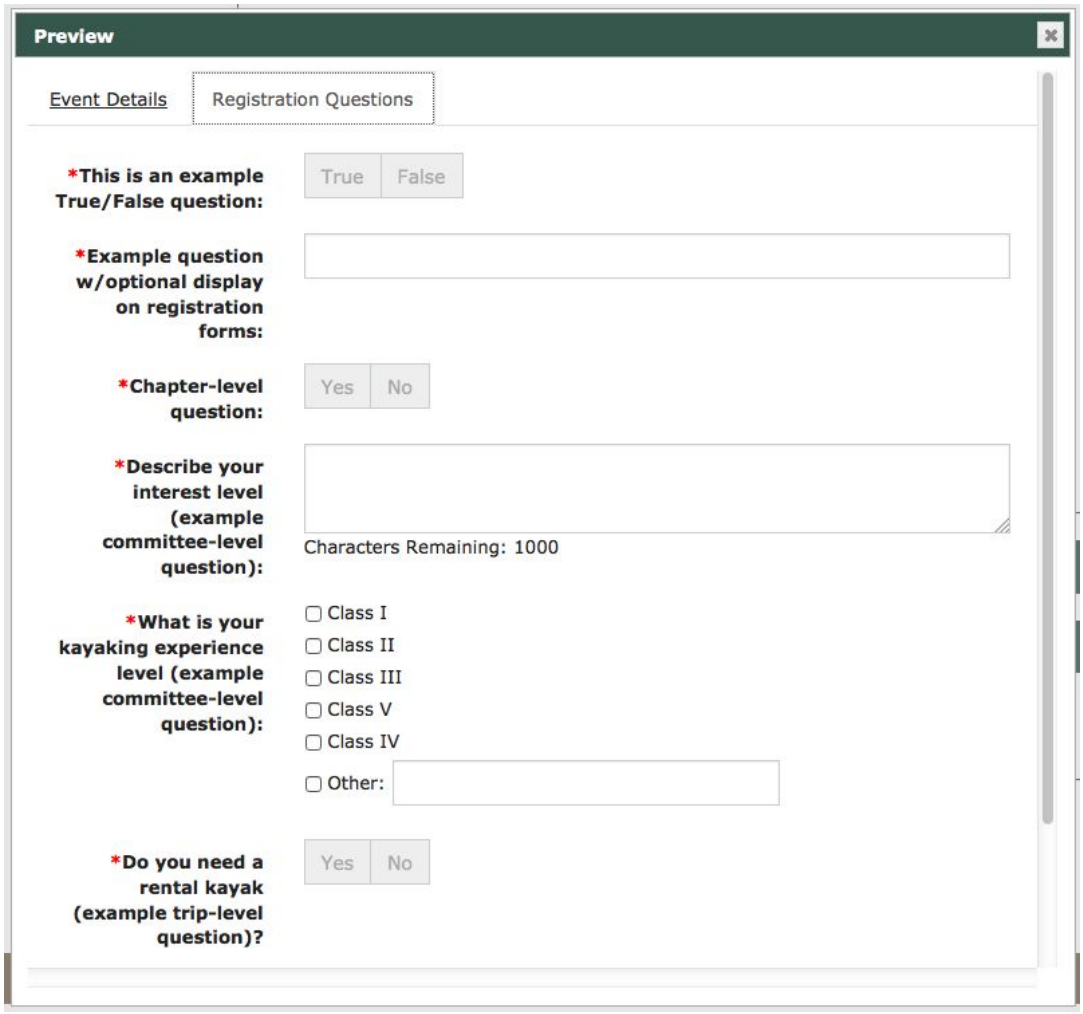
Preview

Once you fix any errors, clicking the preview will show how the trip will be displayed once approved. If you are not using the AMC Registration form functionality, you will just see the event details:



If you have opted to use the AMC Registration form, you will see two tabs – Event Details and Registration Questions. The Registration Questions tab will display only questions that will be presented to participants when registering. Click the "X" at the top right to close the Preview and return to the trip entry form.

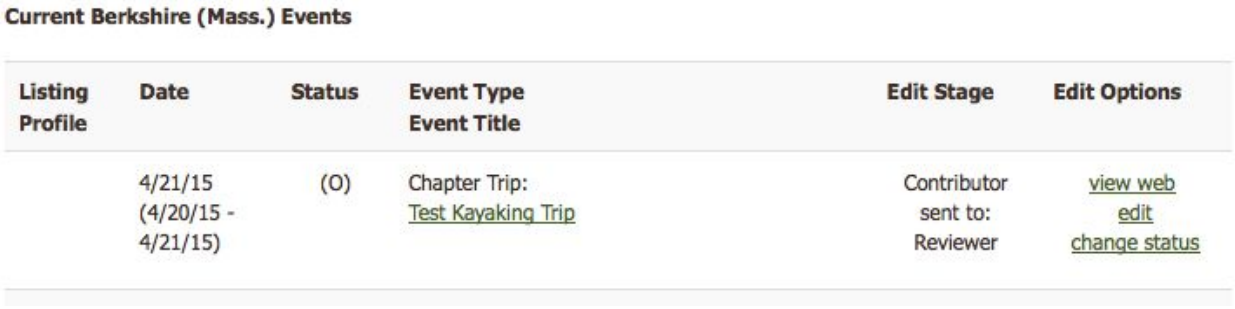




Once you have reviewed the data entered you may submit the trip for approval.

Editing an Event/Trip

After submitting, you will return to the Events Administration screen. If you are a contributor, your listing will be sent on to a Reviewer or Approver for final review. If you are a Reviewer, your listing will move on to an Approver. If you are an Approver, your new listing will go live on the web (and made available to appear in AMC Outdoors if applicable).

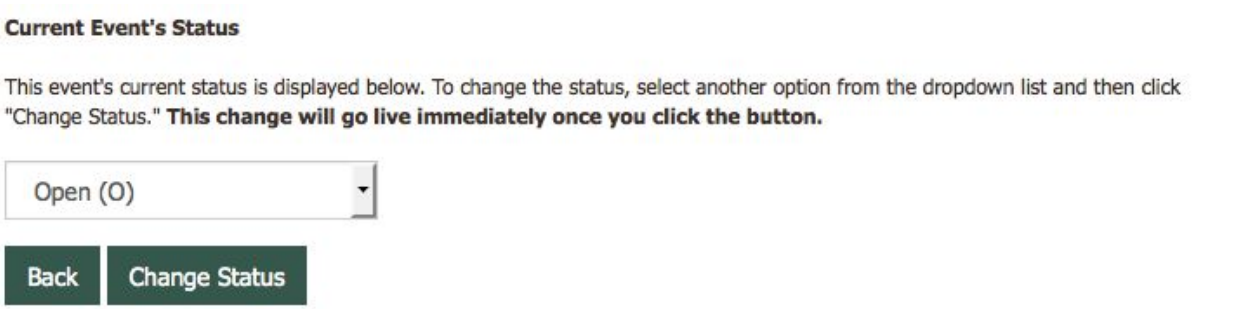


From the Current Events screen you can view the trip listing as it would appear on the web, edit the listing, or change the status of the trip. To edit a listing, search for your event/trip and click the edit link for the trip you want to update. After making edits to your listing, scroll to the bottom of the page and click review.

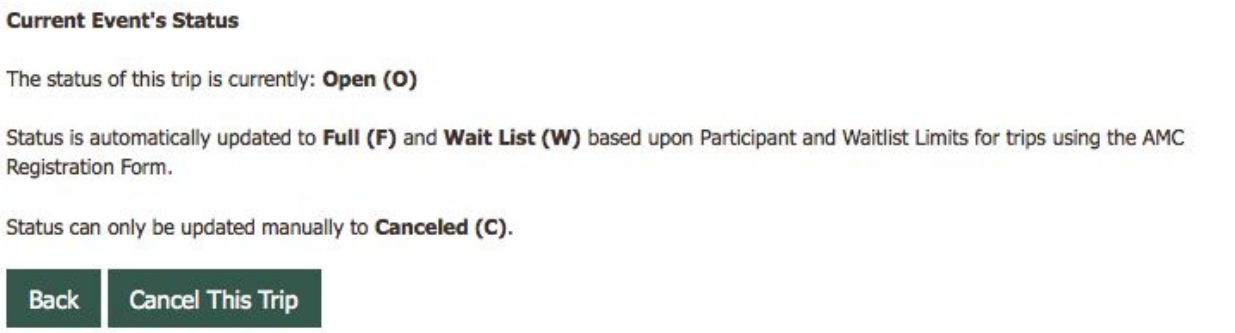
Note: If your listing has already been approved, you will no longer be able to edit it. Please contact your committee Approver to make any post-approval edits to your listing.

Updating Event/Trip Status

Click the "Change Status" link. For Events not using the AMC Registration Form, you will see the form below. Choose the appropriate status and click the "Change Status" button.



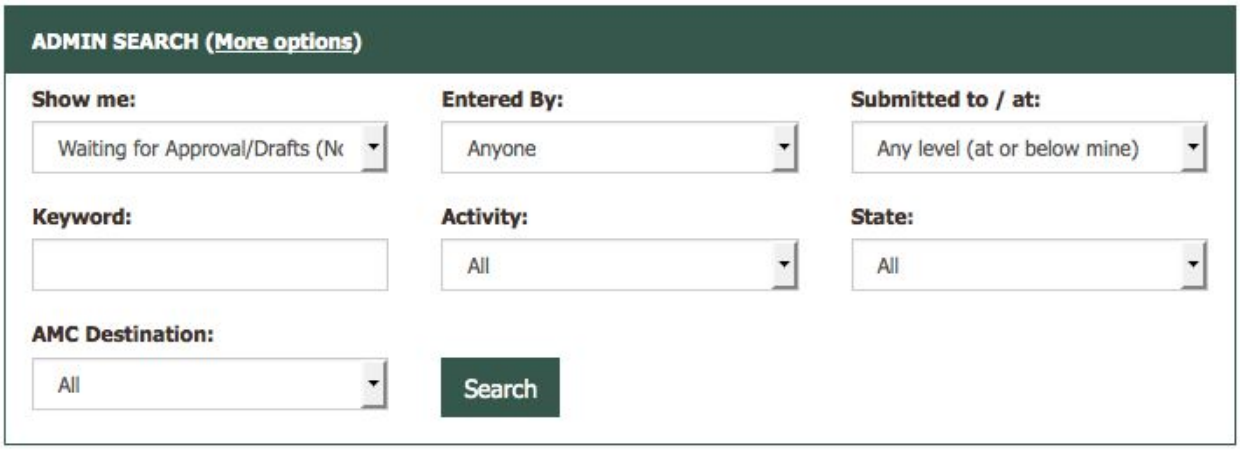
For trips using the AMC Registration Form, you can only cancel the trip (see below). The Status options of "Full" Or "Waitlisted" will otherwise be updated automatically based upon the Participant and Waitlist Limits.



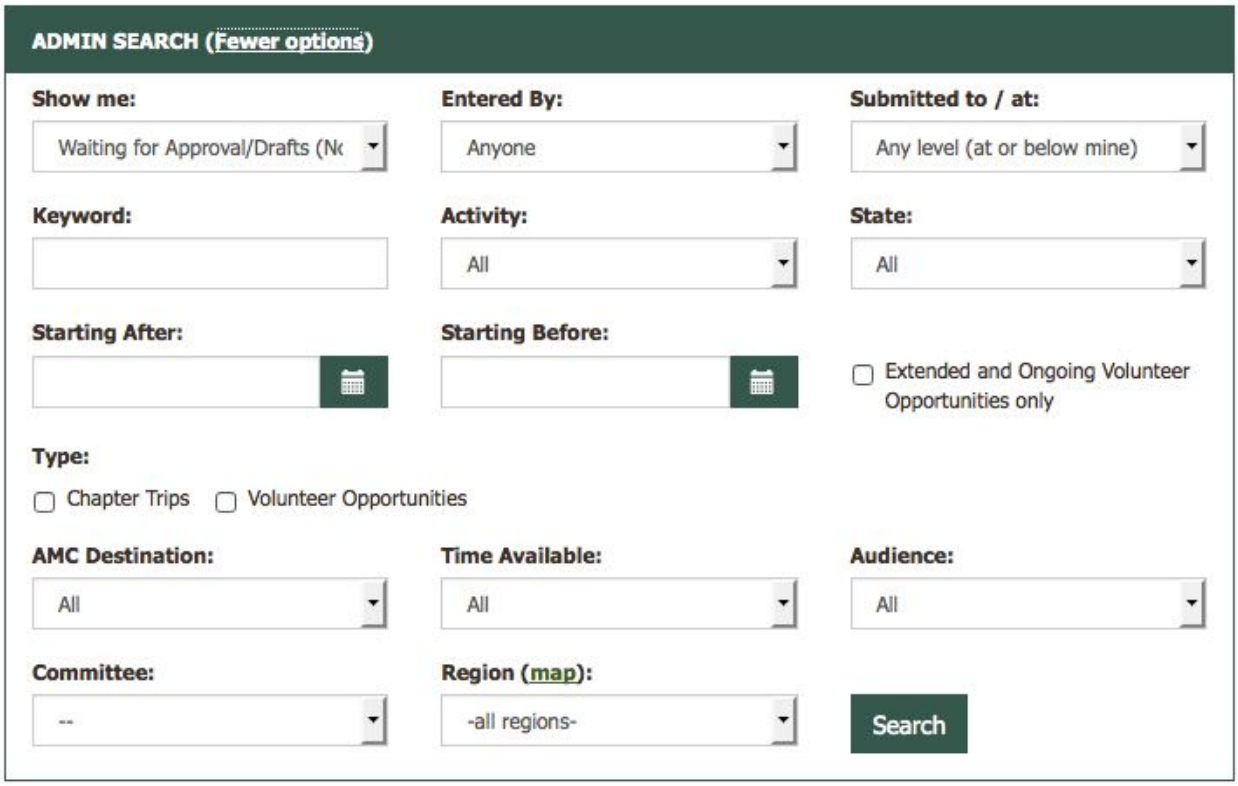
Reusing or ‘Reactivating’ an Archived Event/Trip

*Note: When selecting “reactivate,” you are not actually reactivating the trip, but rather **making a copy** of the trip and publishing the new copy.*

To reactivate an archived trip, use the “Search <Chapter> Events” option in the left navigation bar. In the “Show me” search box, select “Archived” in the first dropdown box. Then click on the “More options” link.



Select the appropriate committee from the “Committee” dropdown box. Click the “Search” button.



You will see a list of all archived trips run by your committee in the last two years. Use the top search box to narrow your criteria (e.g. by keyword or by activity) or page through the search results to locate the trip you'd like to reactivate. Note, if you have many past trips in the system archives, you may narrow your results by using the "Only mine" checkbox – the system will retrieve only your archived trips.

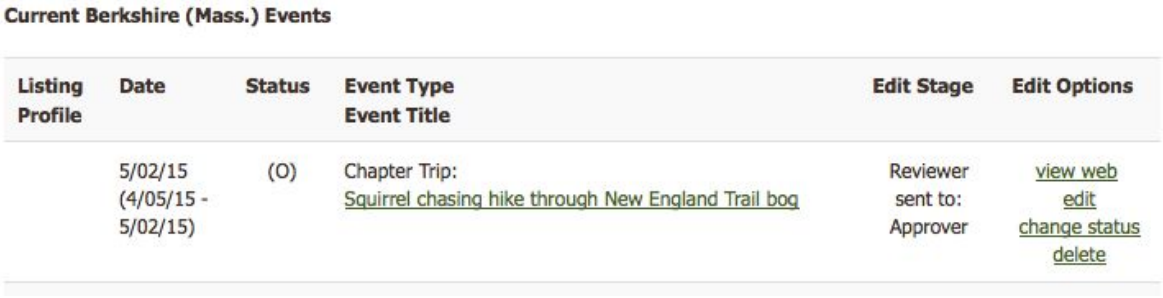
In the "Edit Options" column of the trip list, select "reactivate." The screen will open the event entry form, with the event's date fields now empty. Edit the date fields accordingly. Check the remaining fields for accuracy as conditions may have changed since it was last posted.

You may refer to "Add a New Event/Trip" (page 13) for additional detail on the fields available for trip information entry. Once you are satisfied with the changes, you can click "Save & Forward to Reviewer" to process the trip. The information will then be processed in the same manner as a newly-entered trip.

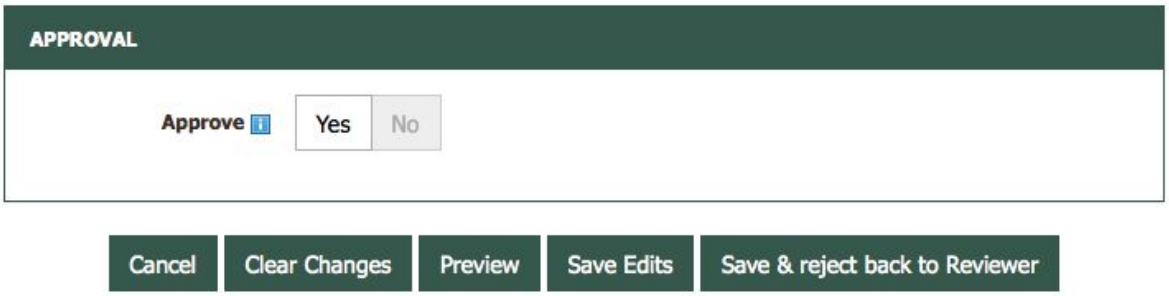
Event/Trip Approval

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.



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...".

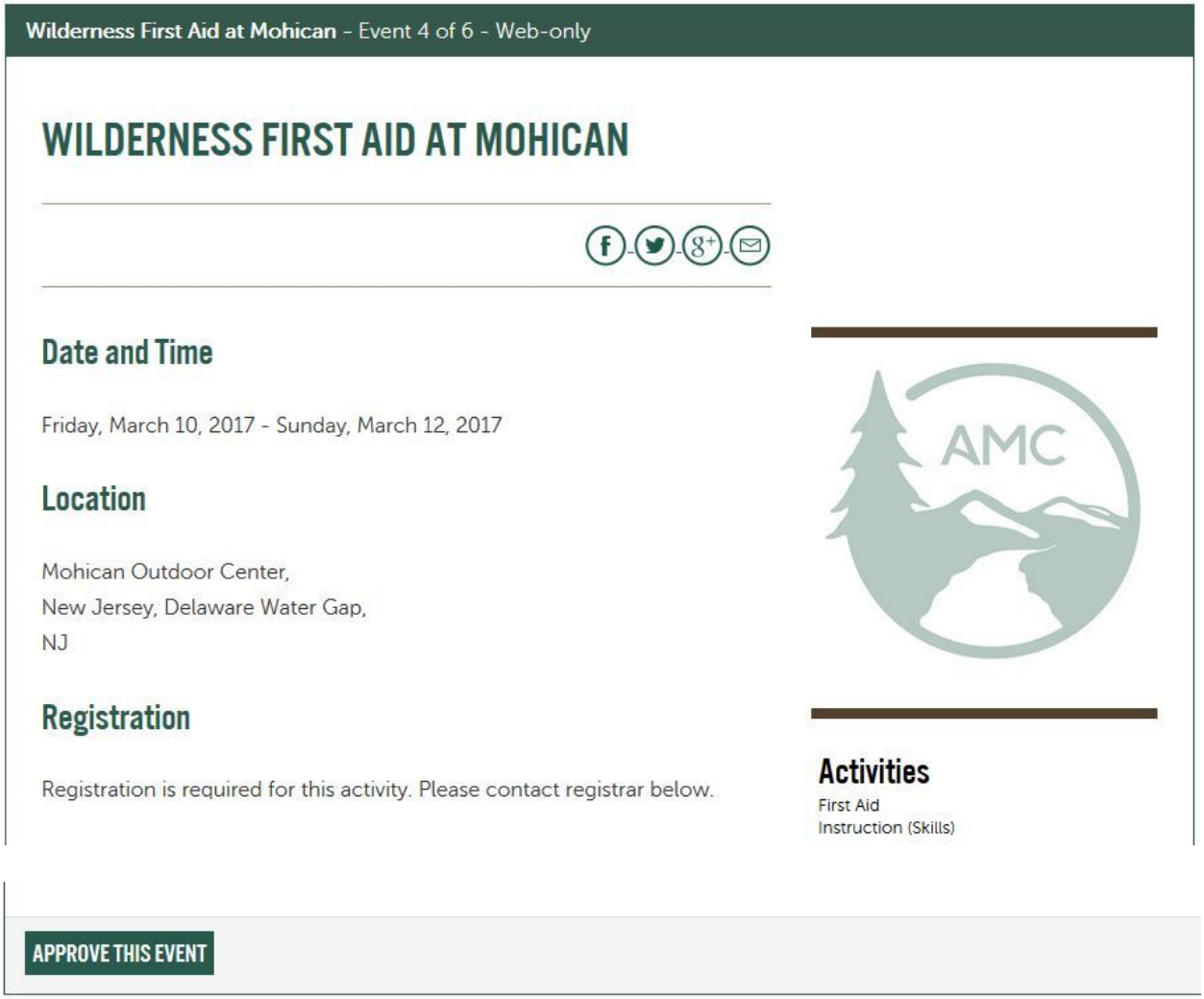


Bulk Approval (Reviewers & Approvers only)

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.



After reviewing each listing, click the “Approve this event” button in the bottom of the listing. Once approval status has been updated, the trip details will be replaced with a message indicating it was approved.