



<https://crew-mgr.com>

Crew Manager

Custom Boat Websites with Crew Scheduling & Notifications

Spring 2021 Zoom Seminar

For Crew Manager Subscribers

Presented by Bill Kneller & EC Helme



Welcome

- Thanks for Subscribing!
- Thanks EC Helme, *J/92s Spirit* for assisting
- Thanks John Short, *Sydney 38 Next* – Crew Manager [Sailing Anarchy Post](#)
- Thanks Dan Corcoran, *J/109 Strider* – April 2021 Practical Sailor Review
- Presentation is available on the Crew Manager main site Zoom Event & will be recorded
- Links in presentation to help follow content after the session
- Participants muted until the end when questions will be answered
- Fast paced presentation with much content – active screen & presentation
- Submit questions on the Crew Manager Support Forum for all to see on the [User Discussions & Questions](#) section (need to create a forum account to post)
- Time permitting – questions will be answered at the end, with written answers posted on the support forum after the presentation



User Roles

- Guests (Anyone not logged in)
 - May view content not under the Crew and Skipper menus
 - Can see the calendar and results
 - Does not see crew information on events except for the display name (DennisC.)
- Subscribers (All Crew added to a site by Skipper, Skipper Helpers & Super Admin)
 - May view content restricted under the Crew menu, subject to site settings
 - Sees other crew contact information on the Roster
 - May set their availability for events
 - May post comments on Events and Posts
- Crew Administrator (Skippers & Skipper Helpers)
 - Set by Skipper or Super Admin
 - Sets site options
 - May add and update crew who are not already on another site
 - May assign crew to groups & email crew
 - May assign crew to positions and override any crew inputs
 - May create, delete and modify events
 - May view Skipper Menu content including defined reports and may create custom reports

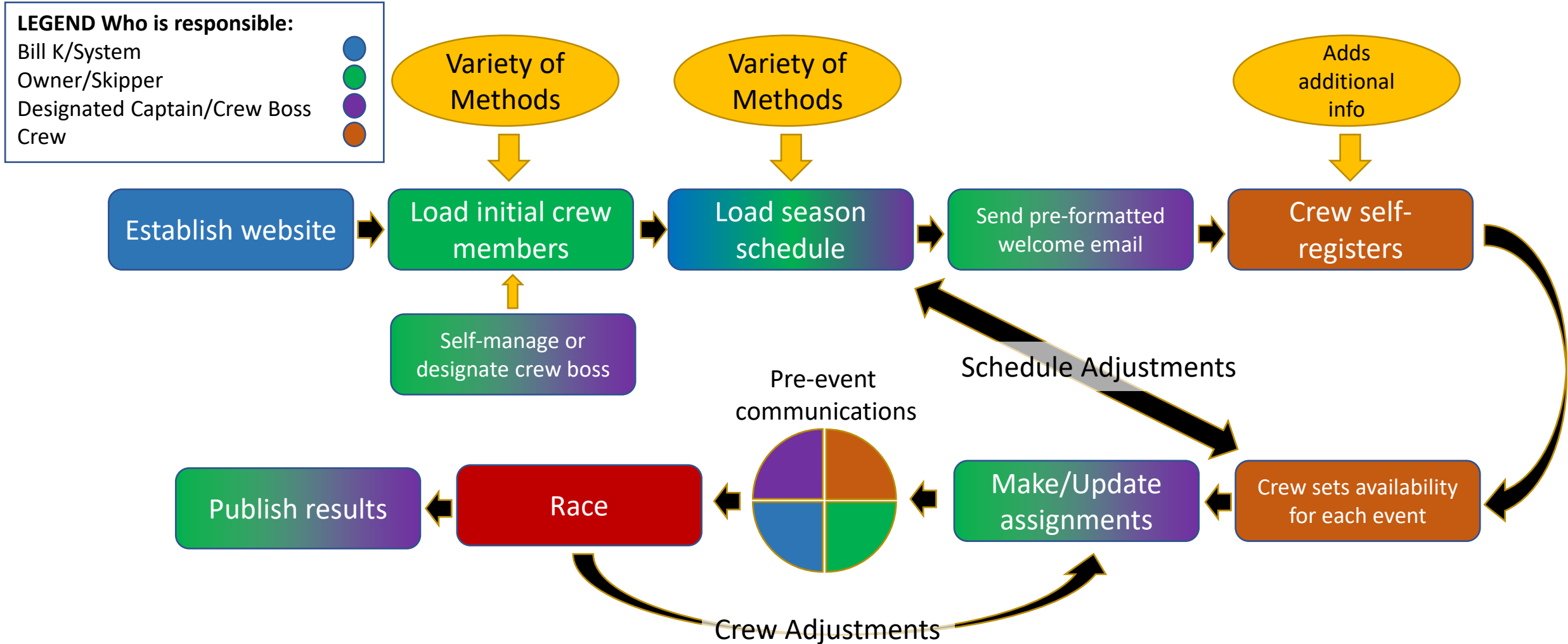


Special User Roles

- Administrator (Granted to site owners by request)
 - May change site content including pages, sidebar widgets and menu
 - May customize site header & background with images and the site color scheme
- Super Administrator (only Bill has this)
 - Has god-like rights on all Crew Manager websites
 - Can create, delete and lock down specific sites
 - May change any website design & content
 - May add a crew member existing on one site to another (by Skipper request)
 - Sees everything including all users and all user info



Typical Workflow Overview





Crew Roster & Profile Updates

- Updated Crew Importer simplified to bulk load crew
- Crew Profile Fields - *Indicates Field Group to be Enabled by Skipper
 - Basic – Email, Phone/**Text**, Clothing, **National Sailing ID**, Sailor ID & Classification, Dates, **PLB**
 - *Passport – Passport Data & Residence Address
 - *Emergency Contact – Name, Address & Contact Information
 - *Travel Information – Dates, Housing & Transportation
- Crew Roster
 - Skipper has easy access to all crew member profiles
 - Easy method to text a group from your phone
 - Logged in Crew may download vCard file for phone or computer import
 - Phone initiate SMS text



Calendar Management

Import & Export

- Import
 - [AI1EC one time feed import](#)
 - [Import from Excel Spreadsheet](#)
 - [Import any Crew Manager site](#)
 - [Enter individual events](#)
 - AI1EC Event List always available
- Export
 - [Sync to external calendars](#)
 - [Export CSV through Custom Event Report](#)

Subsequent Year

- Subsequent Season Tools
 - [Copy Past Season – Annual Smart Copy](#)
- Same Tools as 1st time Setup
 - [Import from Excel Spreadsheet](#)
 - [Import any Crew Manager site](#)
 - [Enter individual events](#)
 - AI1EC Event List always available



Calendar Management

Criteria for Splitting Events

- Different crew on any days
- Boat location or Crew arrival time is different
- Event details differ (e.g., post race activities different each day)
- Special fields differ (e.g., white shirts one day, blue shirts the next)
- Typically, a weekly series would be split since it is likely there will be changes during the season

Regatta Registration Page for Splits

1. Mouse over *Crew* and click *Regatta Registration Status* on the menu
2. Check the box labeled ☐ **Check to Expand Recurring Events with event edit links**
3. Click *Split & Edit* for each of the repeating events starting with the first one to open each in a new window.
4. Make any changes desired to this occurrence, then click the blue *Update* button. If the only change is the Crew for that day, just click the blue *Update* button and the event will be split from the repeating series allowing different Crew for that day.
5. Close editing window once it has saved and repeat steps 4 and 5 until all desired events edited
6. Refresh *regatta Registration Status* page and the separate events will display. Each event has its own crew list.



Crew Communications Options

- [Email Templates](#) may be used as-is, edited or copied for group sending
- [Assign Crew to Groups](#) for targeted messaging
- [Skipper Send Email](#) provides an easy method to contact all crew, or selected groups (including newly added crew)
- [Easy Text Messaging Groups](#) from a smart phone
- [Cancel Event Immediately](#) lets everyone scheduled know that an event is canceled
- [Notify Maybe to Update Availability](#) gets the stragglers to commit



Crew Reports

- Crew Groups may be selected
- Creates a CSV file
- File opens with Excel
- Any / All fields in a user's profile may be exported

Crew reports are a great way to extract information that may be required for distance races and international events

Custom Reports

Event Reports

- Categories, Tags and Date Range may be selected to filter events
- Creates a CSV file
- File opens with Excel
- Any / All fields associated with the event may be exported

Event reports may be created to provide a CSV file for one time import into other calendars



COVID Specific Features

- Hopefully this too shall pass
- Crew profile fields support contact tracing reports required by some race organizers
- How to create a COVID-19 Contact Tracing Report
 - Enable Passport Fields: [Modify Settings – Set Site Options](#)
 - Create a Crew Group: [Assigning Crew to Groups](#)
 - Make a Customized Email Template: [Create or Edit an Email Template](#)
 - Notify Crew to Update their Profile: [Send Email to Crew Group](#)
 - After Crew updates: [Create Custom Crew Report](#) selecting desired fields for the crew group
 - Click Download CSV file at bottom of list
 - Open in Excel and format as desired, then save it and provide to the OA



Crew Briefings

- Crew “buy-in” vital for Crew Manager to be fully effective
- Logical engagement opportunity at pre-season crew meeting
 - Focus on specific crew interest items
 - User profile
 - Setting availability
 - Downloading race calendar
 - Internal crew communications
 - Results
 - Latest news posts and image sharing
 - Benefits for the skipper too
 - Understanding total availability minimizes the impact of unforeseen cancellations
 - Structured communications means fewer missed or misunderstood exchanges
 - Easy to assemble race results data for the previous season
 - Metrics for crew participation and roles

Key themes:

Improved safety via gear/med/contact registration

Fewer spam-like all-crew emails

Easy import of entire race calendar

Updating schedule commitments including changes and cancels



Top Tips

- Start season planning early – helps the crew to schedule their time & get buy-in
- Schedule more than races – work days, deliveries, pleasure sails, social events
- Put extra effort up front with event information for filtering & sorting
- Update information for events as it becomes available or changes
 - Race Documents – put as links using Custom Fields
 - Social Events & Ticket Information
 - Race logistics – food & beverage assignments
 - Include links for tides & weather
- Communicate periodically with your crew with updates
- Start email and text message threads in Crew Manager so you don't inadvertently leave someone off the list
- Record your results and ask the crew to post comments about the race for all to learn



Usability Updates

- Major documentation update with more content & easier access
- Changed servers so emails would not be flagged as spam
- Updated for consistent formats across various pages
- Pages now have “sticky headers” to help when scrolling
- Mobile displays reformatted to minimize sideways scrolling
- Categories have colored dots as visual indicators in titles
- Category & Tag filters improved for selection and display
- Activity indicators added during screen updates
- Real time clock & time zone displayed in site header introduced with international date & phone formatting options
- Recurring events are annotated with all dates and may be displayed expanded or rolled up – Skipper sees salmon colored background



Feature Requests & Bug Reports

[Report a Bug on Support Forum](#)

- Bugs typically killed in less than 48 hours after identification
- Security bugs get highest priority & are typically killed the same day
- If a bug work around is identified, it will be provided
- One known bug associated with [Split & Edit](#) is outstanding with work around provided using [Regatta Registration page](#)

[Request a Feature on Support Forum](#)

- The best ideas are submitted by Crew Manager users
- 54 feature requests submitted have been incorporated
- Submit ideas for consideration
 - New feature
 - Modified displays
 - Other ideas?



Website Security

- External registrations disabled - Crew must be added by Skipper (or Skipper Helpers)
- Crew Information not shared between sites, unless a crew member is added to subsequent sites by Super Admin (as requested by Skipper)
- Private option added to hide selected content on events and posts from those not logged in
- Firewall installed to prevent hackers
 - Google captcha to thwart robot attempts
 - Repeated unsuccessful login attempts are automatically logged and blocked
 - Blocked IP addresses automatically sent to their originating IP to prevent denial of service attacks



Future Plans

- Update calendar Agenda view
 - Properly handle recurring event split & edit
 - Provide look similar to Regatta Registration page
- Provide Cancel Event Immediately option for recurring events to only cancel a single event rather than the entire series
- Provide a Split & Edit option to split all events in a series at once, rather than having to do each event individually



Wrap-up

- Questions will be answered from Support Forum and selectively unmute
- Crew Manager was built by a sailor, for sailors
 - If you like it, tell your friends to subscribe
 - If there is something you want done differently or an improvement – submit a feature request
- Thanks again for subscribing



Crew Manager Support Forum

Crew Manager Support Forum

The place to turn for questions and answers about Crew Manager. Anyone may read without logging in. The support forum requires all who post be registered and log in. This is a separate registration and log in from the Crew Manager Shop.

Click either if you already have a forum account (or below)

[Quick links ▾](#) [Smartfeed](#) [Board index](#)

- Seminar questions should be submitted on the Crew Manager Support Forum
- On your site menu mouse over *Support* and click on *Support Forum*

[Register](#) [Login](#)

Click here to create a forum account if needed

It is currently Mon Mar 29, 2021 6:24 am

CREW MANAGER FORUM

	TOPICS	POSTS	LAST POST
Documentation & FAQs Contains user manuals, frequently asked questions & responses. This is a read only forum.	40	64	Updated: Tips for Creating & ... by admin Mon Nov 02, 2020 7:17 am
Report a Bug If you find a bug, please report it in this forum.	23	53	Re: Bug Fixed: Error Message ... by admin Sun Mar 28, 2021 9:44 am
Request a Feature or Enhancement If you have a suggestion for a new feature or modification, please post in this forum.	57	143	Feature Incorporated: Crew on... by admin Thu Mar 25, 2021 11:11 pm
Crew Manager User Discussions and Questions Users post general questions and discussion topics in this forum.	2	7	Re: [crew] cannot be deleted by admin Fri Jan 08, 2021 2:38 pm
Pre-Sales Questions Potential Crew Manager subscribers may post questions about the product and subscriptions in this forum.	1	5	Re: text messaging feature - ... by admin Thu Jan 07, 2021 9:58 am

Click here to open the *Discussions and Question* section after logging in

[LOGIN](#) • [REGISTER](#) ***FORUM LOGIN IS SEPERATE FROM CREW MANAGER LOGIN AND MAY BE DIFFERENT

Username: Password: [I forgot my password](#) | [Remember me](#) ☐ [Login](#)

WHO IS ONLINE

Another forum login option