

Leader Access for Obsidian Online Trips System

Accessing

Caution: If you have accessed our trips system via one User Name prior to accessing the online trips system with a different User Name, it is important that you have exited (by clicking the 'Exit' button) the first log in session, or else when you attempt to log in again you will be returned to the first session even though you are using a different User Name.

- Obsidian trip leaders who have trips "Scheduled" by the sponsoring committee may access their trips in order to complete the signup sheet information (and later trips reports) for those trips by clicking on the 'Online System Access' link on the Obsidian home page (www.obsidians.org) then logging in with your user name and password on 'Obsidian Online System Login' page.
- This takes you to the 'Activities Signup' page (the place where people sign up for trips), but which will have an extra tab labeled 'Leader Access' available if you have scheduled trips that you are leading. Click the 'Leader Access' tab to see the list of trips you are leading.

Obsidian Online **Activities Signup**

John Jacobsen - johnwjacobsen@comcast.net Please click 'Exit' when finished ---->

Online Signup Account Info Trip Reports **Leader Access** Full Schedule

Available online for signup: View signup sheets or sign up for trips/activities that are currently available for online signup. Trips will become available 3 weeks before their go date and will be removed shortly before their departure time.

Date	Activity	Event Name	Leader	Dist	Elev		
Tue 4/19/2016	Present	Summer Trips	Cooper, John			<input type="button" value="View"/>	<input type="button" value="Sign Up"/>
Wed 4/20/2016	Hike	Amazon Hdwtres/Spencer	Lodeesen, David	6.2	1530	<input type="button" value="View"/>	<input type="button" value="Sign Up"/>

The 'Go' Button

Obsidian Online **Leader Access**

John Jacobsen - johnwjacobsen@comcast.net Please click 'Exit' when finished ---->

Online Signup Account Info Trip Reports **Leader Access** Full Schedule

Go to a trip that you lead: Access your trips to edit the signup sheet, add participants or complete the trip report.
For printable download PDFs of: [Signup Sheet](#) [Contact List](#)

<input type="button" value="Go"/>	Sat 7/30/2016	SmCmp	Camp Robertson - Ruby	SignUpSht_11246.PDF	ContactList_11246.PDF
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- Clicking the 'Go' button in front of a trip will take you to one of two different forms dependent on the date relative to the trip's go date:
 - **Leader Access – Trip Signup** - If the date is prior to the go date of a trip, you are taken to the 'Leader Access – Trip Signup' form where you can add or edit the trip's departure information, distances, elevation, difficulty, trip description, equipment and food needed, etc. You can also add participants to the trip. See below for tips and help with specifics.
 - **Leader Access – Trip Report** - If the date is on or after the date of the trip, you are taken to the 'Leader Access – Trip Report' form where you can fill out your trip report, update actual participants and trip fees.

Note: If a trip needs to be rescheduled, cancelled or the destination needs to be changed, the sponsoring committee must be contacted so that they can change those parameters – they **cannot** be changed by the leader.

Filling Out the Trip Signup or the Trip Report

- When you click on a field to add or edit data, it may take some time (up to 30 seconds) for the system to setup for editing and be ready for you – patience please.
- There are help notes in a blue font on each of the forms that offer guidance for filling out specific items as well as general help with each form. Please review those notes to avoid forgetting something or entering information incorrectly and use care in following the notes regarding the form of the entries:
 - Departure time entered in form: 8:00am, not 8a.m.

- Distances and elevation entered as either whole or decimal numbers only, no descriptors like 8mi, or 800ft. or 800’.
- There are two situations that may show up in the ‘Position’ field for a participant which will normally be ‘Participant’ or ‘Leader’. They are:
 - **‘Minor’** - The participant is under 18 and will have no trip fee charged. All minors must have a parent or guardian sign the Signup Sheet rather than the minor. Depending on the activity the parent or guardian may be required to accompany the minor on the trip – see the appropriate trip leader’s guidelines for specifics or contact your sponsoring committee chair.
 - **‘Restricted’** – This participant has been restricted in some way from participating in activities and may not be acceptable for participation on your trip. Contact the sponsoring committee chair for guidance and how to handle this situation.
- The system is set to time you out after 15 minutes (note: this time has recently changed to 1 hour and may stay there – minimizing the impact), but clicking the 'Commit Record' button at the top of the form, as you complete entries, or a series of entries, will save your work to that point and restart the timeout clock. This is important if you like to contemplate your entries at length. If the system times you out, the entries you made since when you started or the last 'Commit Record' could be lost. When you commit the record, there will be the same delay (up to 30 seconds) to re-access the editing mode.

Adding Participants to the Signup Sheet or the Trip Report

- Most participants should sign themselves up via the online trips system and leaders should encourage this when possible. In the rare situation where a participant is unable to do this, the leader may sign someone up via the ‘Leader Access – Trip Signup’ or in the case of someone who went on the trip, but had not signed up prior to the trip, via the ‘Leader Access – Trip Report’ form.
- To add a participant, you must use the ‘Add a Participant’ box shown here:

Add a Participant: Select a participant to add from the ID List, then click the 'Add' button to sign them up. Transportation options can be edited in the sign up list below. Only Obsidian members and guests who have registered (and been accepted) can be added to the sign up list. You will need to manually enter applicable trip fees in the list below.

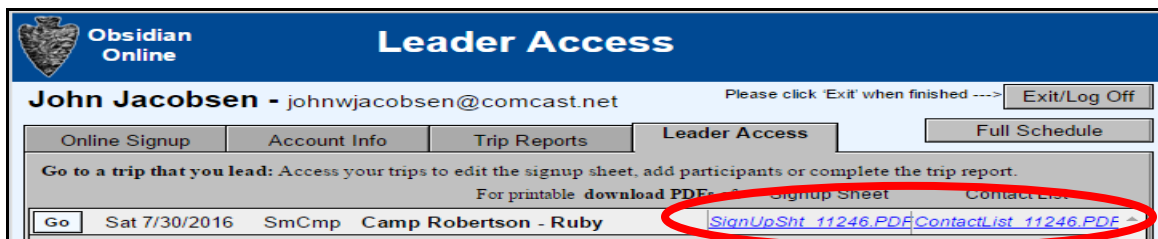
ID List:

NOTE: THE LOADING OF THE DROP-DOWN LIST MAY TAKE AWHILE - click the ID List once, then patience please.

First select a participant to add from the ID List. It may take some time for the drop-down list to generate, but when it does, you may either scroll thru the drop down list or an easier alternative is to type (relatively quickly) the first few letters of the last name you are seeking to find the participant to add. When found, click on the name of the participant and it will appear in the ID List box. Then click the 'Add' button to sign them up.

- Only Obsidian members and guests who have registered (and have been accepted) will appear in the drop down list and are therefore the only people who can be added to the participant list. If someone who is not registered needs to be added as a participant either on the Signup Sheet or the Trip Report, they must first register via ‘Online System Access’ on the Obsidian home page. The leader may choose to do this for them or they can find someone who has access to the web who is willing to do it for them, but it must be done (and the registration accepted) in order for them to be added to the participant list.

Accessing the Signup Sheet and Contact List PDFs



- On the ‘Leader Access’ tab, two downloadable PDF files are available once the trip is accessible for online signup (usually 3 weeks before the trips departure date)
 - **Signup Sheet** – This PDF is the ‘official’ Trip Signup Sheet that you will use to gather the

participant signatures. **Note:** Download the Signup Sheet PDF file to print out your signup sheet - **DO NOT** print it directly from your browser (via the 'View' button on the 'Online Signup' tab nor the 'Go' button on the 'Leader Access' tab). **DO NOT** use the Contact List (a list of the trip participants with their contact info) for your Signup Sheet.

Online signup is available for your trip until about an hour before the trip's departure time - so it is suggested you don't print your Signup Sheet out until as late as you can reasonably wait, to accommodate any late signers or late participant cancellations.

- **Contact List** – This PDF is a handy download for the leader's use that includes basic trip data and participants, along with participant contact info (email and phone number) and emergency contacts, and does not have all the Recognition of Risk and other standard verbiage that the official signup has. Intended primarily so leaders can get a list of participants along with their contact information – useful for contacting participants, arranging car pools etc. **DO NOT** use the Contact List for your Signup Sheet.

Extra Steps when the Trip Report is completed

- **DO NOT** include the trip participant names in the narrative trip description – the online trip system will generate that information and include it automatically.
- You will need to change the status of any participant who went on the trip from 'Signed Up' to 'Completed'. For those listed that did not go on the trip, select the appropriate status: 'Cancelled', 'No Show' or 'Over Limit'. People who were on the wait list and were unable to go would have their status changed to 'Over Limit'.
- Check/edit the participant's trips fees to insure they match the collected amount (and amount to be submitted). Trip fees for those who did not go on the trip for whatever reason should be blank (not 0). Enter numbers only for trip fees, no \$ signs.
- Add any participants not previously signed up per procedures above.
- **Make sure** the trip counts and fee total at the bottom of the report are accurate. If changes are made it may be necessary to click the 'Refresh Totals' button to update the totals.
- Scroll to the bottom of the page and enter the trip report completion date. This flags the trip to let the governing committee know it is finished and ready for committee closeout.
- **Immediately upon completion:** Send the Sign Up Sheet with signatures and a check for trip fees in the self-addressed, stamped envelope you received in your trip packet to the sponsoring committee.