



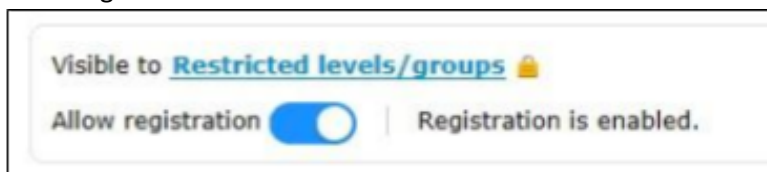
# OSAT CONDITIONER

## Event Creation Checklist

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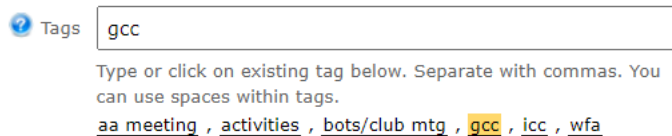
### Logging on to Website

- Logon to OSAT website as “Admin View” and go to “Events tab” and “Events List”. Remove all criteria if needed and search for “2300”.
- Click the “Duplicate” button on the event “OSAT GCC CONDITIONER: <Enter Destination Description>”.  
This will create an identical event with the prefix (Copy) that you will edit.
- Click on the “Edit” button in the upper left corner.
- At the top of the screen you will see the “Visible to” setting. Initially, this will read “Admin” while you are working on the event. Once you have completed the entire event setup, the last step will be publishing the event by changing this setting from “Admin” to “Restricted levels/groups”. Once changed, it will be visible on the calendar to OSAT members, and e-mail announcements, reminders, etc., will be turned on. There is also an option for “Public”, but this should not be used, as it makes the event viewable by anyone accessing the OSAT website, including non-members.



### Event Details Tab

- **Basic Information Section** 🛠 Edit “Title”
- **When and Where Section**
  - 🛠 Edit “Location”
  - 🛠 Edit “Start Date, End Date and Times”
- **List of Event Registrants**
  - 🛠 No Edits are required in this section
- **Guest Registration**
  - 🛠 No Edits are required in this section
- **Tags**
  - 🛠 Pick only GCC tag per event. Do not add tags. These 6 tags are color coordinated.



- **Description Section**
  - 🛠 Edit Trip Title

- 👤 Edit Trip Date
- 👤 Replace Picture, set size to Medium or Large. Or leave the OSAT picture
- 👤 Edit Trip Description
- 👤 Edit Distance
- 👤 Edit High Point
- 👤 Estimated pace in miles per hour, or description, such “leisurely”, “moderate”, Strenuous”
- 👤 Edit Meeting information. Be specific. In additions to an address, include something like “parking lot to the East (right-hand) side of the store.”
- 👤 Edit the Estimated Duration
- 👤 Edit an approximate Return Time
- 👤 Edit the carpool link, be sure to insert as “link” by clicking the paper clip looking button, then choose “insert link”. See [Creating Carpools](#) below.
- 👤 Edit What to Bring
- 👤 Edit Passes Required, such as Discover Pass, National Park Pass, etc.
- 👤 Edit Trailhead Directions. You can copy/past from WTA or similar website but be sure to past using CTRL+SHIFT+V to past only values.
- 👤 Insert link to Overview Maps, upload map from Caltop.com to OSAT Activities folder.
- 👤 Edit Leaders’ Names, Roles, E-Mail and Cell Phone information.

#### **Registration Form Tab**

- No Edits are required in this section.

#### **Registration Types and Settings Tab**

We have a cap of 12 total participants for all conditioners; do not change the default setting regarding registration caps. Once the registration limit is reached, additional registrants will be added to the waitlist.

#### **Emails Tab**

- **Event Organizer Section**
  - 👤 Set organizer to the conditioner leader. They will get copies of event announcements, confirmations, cancellations, etc. Typically, this would be yourself and you will receive notifications of signups, cancellations, etc.
- **Announcements Section**( Updated Feb 2023) -: *Please remove the announcement email.* This is to ensure we are limiting the emails into members' inboxes, so folks pay attention to the emails that matter. For GCC, students should be checking the calendar for updates vs. relying on emails.
- **Reminders Section**
  - 👤 Click “Reminder 1” to preview the Reminder.
  - 👤 By default, **REMINDER 1 is setup to go to the registrants 3 days before the event.** You can adjust the dates by clicking on “Change Schedule” and changing to the desired date.
- **Registration E-mails Section**

Registrants will get a registration confirmation, cancellation confirmation or a Waitlist confirmation after they have registered. You can preview these by clicking the appropriate emails. Generally, no changes are required.

#### **Registrants and Invitees Tab**

- No Edits are required in this section.
- Current registrants will be listed in this section.

#### **Waitlist and Settings Tab**

- No Edits are required in this section.
- Any members that have been 'waitlisted' will be listed in this section.

Once you have completed the event setup and reviewed the test e-mails and everything looks good, you will publish the event by changing the "Visible To" setting to "Restricted levels/groups".

**Click Save!**

## **How to Add Registrants Manually to an Event (Make Sure to Add Your Co-Leaders).**

Once you have created a new event, you may know that certain participants, such as co-leaders will be attending. You can go ahead and add registrants manually at any time. It's best practice to add your co-leaders right away after you create the event to make sure it doesn't fill up with student registrants. Simply save the event and follow these steps:

1. On top menu, choose "Add Registrant"
2. Click on the grey box labeled "Select Existing Contact".
3. Search for and select the members name
4. You will need to accept the Participant Expectation on behalf of the member
5. Select a registration type.
6. Choose "Save".

## **How to Send an E-mail to ALL the Registrants.**

You can send update messages to all the registrants very easily! From the event, you will see an "E-mail

Registrants" button at the top of the screen. Click the "E-Mail Registrants" button

1. **TEMPLATES** => Scroll and select the template titled "OSAT ACTIVITIES MESSAGE" from the list of templates
2. **DESIGN** => In the message body, replace the text "<Insert message text here.>" with your message.
3. **PREVIEW** => Preview your message to be sure it meets your exacting standards.
4. **RECIPIENTS** => By default, you should see the "Current Event Registrants" highlighted. You can add additional people or groups by clicking on Contact or Contact List.

5. **REVIEW AND SEND =>** In the upper left corner, “Send it now” will be marked. If you the message meets your approval, click “Send” in the upper right corner to send the message to the registrants. You can also change from “Send Now” to “Schedule for Later” and choose a date and time for the message to be sent.

## Creating Carpools on [www.groupcarpool.com](http://www.groupcarpool.com)

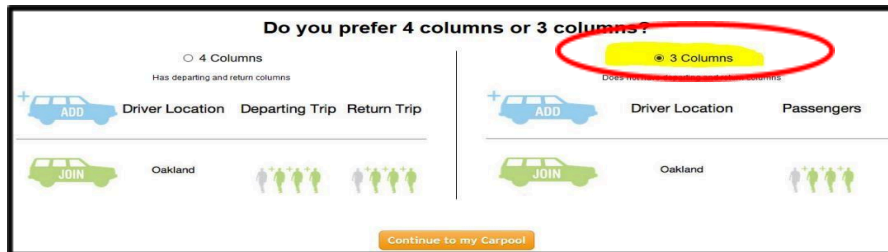
Fellowship is a big part of OSAT - and a great way to get to know some of your fellow members better is to carpool to OSAT events together. Here’s an online site to help organize carpools: [groupcarpool.com](http://groupcarpool.com). Check out this video to see how easy this is to use.

If you are an **event organizer**, please consider using this capability to set up a custom carpool site for your event and include the customized link to your event-carpool site on your event listing. For an example, see this event on the calendar. Follow these steps to create your carpool, link into the provided space in the event template.

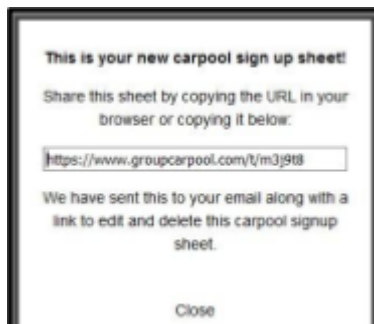
1. Go to [www.groupcarpool.com](http://www.groupcarpool.com)
2. Fill in the Event Name, your e-mail address and then click on “Create Carpool” button.



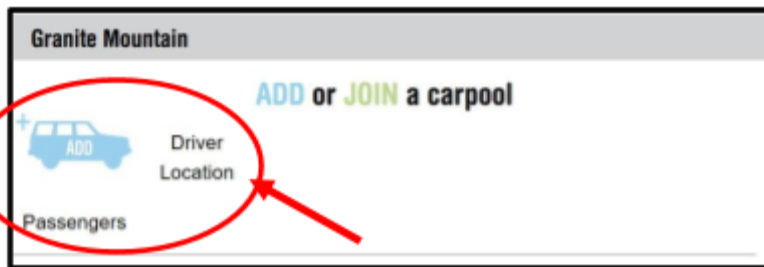
3. Choose the “3 Columns” option



4. You will be shown a link. Keep this link available. You will need this if you need to make changes. You will also receive an email with the information too.



5. You can just stop here and insert the link into the event template. Just because you created the carpool link doesn’t mean you have to be a driver! Someone else can drive. Whoever wants to drive can add a car. They would simply click on “Add”.



6. Fill in the driver's information, include how many seats you have available, the meetup address, departure time, and notes to describe the location, what time to show up, for example to allow time to transfer gear. Then click "ADD CAR".

7. Once a car has been added, others can add new carpools, or they can JOIN a carpool by simply clicking JOIN.



8. To JOIN a carpool the rider simply fills in their information and clicks "Join".

Join car

Name

Joe Passenger

Email

joe.passenger@email.com

Phone

425-123-4567

City

Bellevue

Address

State

Notes

update

cancel

delete

- Now when you look at the carpool, you can see for an existing car, who the driver is what passengers have signed up, and what spots are available.

JOIN

Issaquah

7:00am Thu 5/30

Scott

Meeting in front...

hide details

Driver

Scott Shively

skshively@gmail.com

4254669647

edit

First Passenger

1234 Gilman Blvd.

Issaquah, WA

7:00am Thu 5/30/19

Joe Passenger

+ Join Car

+ Join Car

Two Open Spots

Meeting in front of REI store at 6:45 am, leaving at 7 am sharp!