Thank you for your patience and understanding while we work with the developers on the new and improved Online Reporting System (ORS).
We have already fixed several issues, and are working hard to get the system where we need it to be. There are many ways we have tried to simplify the processes. Here are some key things to remember below.

Please, please, please go through your lists and make sure that people are marked correctly. *I guarantee you there will be veterans marked as civilians (previously staff) and family members marked as veterans (probably marked as paddlers before).*

**Adding members:** Please encourage new participants to register themselves on the site so that they can mark their attendance to events! This allows for more correct data and decreases the work you have to do!

**Questions/Suggestions:** Please read the FAQs, tutorial, and test out the site first and foremost. If you've looked through the FAQs, tutorial, and played with site AND STILL need help or some feature isn't working, please contact Dana - dana@teamriverrunner.org

Other Notes: In our testing the site seems to work best in chrome and firefox
"Why can't I save the edits I have made to a member": The answer to this question is almost always going to be: there is a duplicate email being used in the system. Once you have a unique email for the member, you can 'save' changes.

"I gave secretary access to a member but they can't log in, or don't have access": (as above) The person's email is probably is entered twice in the system. Type the member's email in the 'Members' Filters search bar (make sure to search active and in-active members using checkbox below) to find out if this is the issue. If so, create a false email for one of the accounts, save it, and make one of the accounts inactive. If that doesn’t work, go into the members active account, make sure they have a unique email entered, and have only one role selected: in this case 'secretary' NOT secretary and member.

"How can I enter peoples birthdate without having to scroll through each month of each year?" Click directly on the year. That will open up a calendar option and allow you to scroll back more quickly. Same thing for the month. If you click directly on the month, a Calendar of month options pops up. Reminder: Birthdates are not mandatory to enter.

"What is the difference between Draft and Published as far as creating an event on the calendar?": If you are in draft mode you can still easily edit the event. If you have published the event and need to add attendees or make changes, you need to hit the edit button (top right) in order to do so. We are hoping that the developer will merge Draft/Publish to eliminate the need to publish each event. One less step would make the system easier to use.

"Can I delete a member?": You can delete a member, just make sure that they don't have any events attached to their account and please enter a fake email for them before deleting. The system won’t allow you to use an email address twice, even if one of the emails is deleted. Consider making a member inactive instead, especially if they have events linked to their account.
1) **User type:** There are now 3 very clear user types to choose from. Veteran, Civilian and Veteran family member/caregiver. Please go through your chapter lists and make sure that people have the correct user type. There are definitely incorrect assignments of user types: there will be veterans marked as civilians (previously staff) and family members marked as veterans (probably marked as paddlers before)

If you are unclear which user type to use:

**Veteran:** Any veteran or active duty service member

**Veteran family member/caregiver:** A family member or caregiver of a veteran participant - only choose this if they are not a veteran themselves. If the family member or caregiver is a veteran, choose veteran

**Civilian:** People who don't fit into the other two categories.

2) **Duplicates:** We need to decrease the amount of duplicates if possible.

We would like you to de-activate them. To do this-
- Click on the duplicate member’s name.
- Enter a UNIQUE phony email in the email field (I suggest just entering an X in front of their current email) The system does not allow for duplicate emails so even your duplicates need to have unique emails.
- Click on the TRR Info Tab
- Un-check Active.
- Click save

Deleting the duplicates may sound easier, however it would remove the member from any past events that they were entered as attending which would mess with reporting. If the member you wish to delete doesn't have any events please make sure they have a fake email assigned before deleting them.
To Login, go to https://ors.teamriverrunner.org and click Sign In

If you previously had an ORS account, you can use the SAME login you used before. If you are new to ORS you can register right there on the page for an account.

By default, the calendar shows all events that have been created. Using the filter on the left hand side, you can choose to see only events from certain chapters.
To create a new event you can either click on the event symbol at the top of the calendar or the + sign on any of the days on the calendar.

You can enter all the event details here. Click publish when you're done. You can also add budget details and photos. Attendees can also be added here or after the event has taken place.

When you want to add members to your event, you can do so by clicking on the event from the calendar, click attendees and then click edit in the upper right hand corner.
Once you click edit like in the previous step, click the attendees tab. From here you can use the add members button. Please note that you can only add existing members from here.

When you select add members in the above step you will see this screen. You may choose from this existing list of members but not create a new one from this screen.

Please note at the top of the screen the status of your event-draft. You can either select publish or cancel. Same on the other side you can delete, save or exit. Make sure to save your work if you are not finished!
To remove a member from an event, click on the event and click edit (top right). Next click on the 'Attendees' tab and click on the 'x' to the right of the person's name which you would like to remove.

You can click on the pencil icon next to the 'x' to edit the members information.

Using a phone (view at left) the screen will look different but use the same instructions as above.
A note about adding members: For regular users (non secretary, admin etc) this system is best designed for your new members to register on the site themselves and then they can sign up for events.

You can add a member by clicking members from the home screen and then "new member" in the upper right hand corner.

Things that are required by the system:
- First Name
- Last Name
- Chapter
- Email
You cannot click next and go to the next page without these.

If you would like to participate in VA grants, you MUST include the zip code of your participant.

The Events tab will show the events the member has attended or is registered for.
Another important part about adding a member is when you click on the "TRR Info" tab. You will be able to mark the media release and waiver signed here as well as deactivate a non active member by un-checking "active."

Sponsored by and status are not important and will soon not be showing here anymore.

Under role, you will see 3 types of roles. SELECT ONLY ONE
Admin will be national staff and regional coordinators.

Member is a user of the system that signs up for events but does not record data or add events and members for a chapter.

Secretary is the role for a chapter coordinator or anyone else in the chapter who is the person who completes ors. Even if you aren't the chapter secretary, this is your role assignment within the system.
USER TYPE

This was previously the more confusing "staff" and "paddler" definition for members. We have created 3 User Types to make this simple.

Veteran- Any veteran of any era, and active duty members should have this as their user type. If you are a volunteer or chapter staff and a veteran, you choose this user type.

Veteran Family/Caregiver- If a veteran attends your event and brings a family member or caregiver and they themselves are not a veteran, this is what you choose for them.

Civilian- This is for civilians that are non family members or caregivers of a veteran.

There are many veterans in the system who are currently marked as civilian because they were previously marked as staff. That means they aren't counted in our numbers. Please go through your member list and make sure that all veterans have veteran as their user type.
Just like when creating events, make sure that you click save when you enter new information and/or when you are finished adding in all the information.

If you don't do this and don't get a screen like the one to the left, your information hasn't saved.

Under options is where you will find things like certifications, outfitting skills etc that you can add to your member if you'd like to keep a record of it.

We have simplified this list as best we could from the old system and will continue to do so.
On the diagnosis tab, you can click add diagnosis to record a member's injury or disability. This is optional but we decided to keep this for chapters to be able to have this information accessible electronically.

Here you can add any diagnosis that was from the ors system. We may edit this list over time but we will make sure that the options are enough. There is also a comment box if you need to write additional notes about the member's injury.
MOBILE/ Tablet APP DIFFERENCES

On the login screen this is the button to sign in.

This is the publish Icon on events when using the site on mobile. On the right hand side you will see the trash icon for delete, the floppy disk for save and the arrow is exit.

These 3 lines are the filter for the calendar. Clicking on this will allow you to filter chapters events on the calendar.

This is what the members button looks like when using mobile.