ORS Tutorial

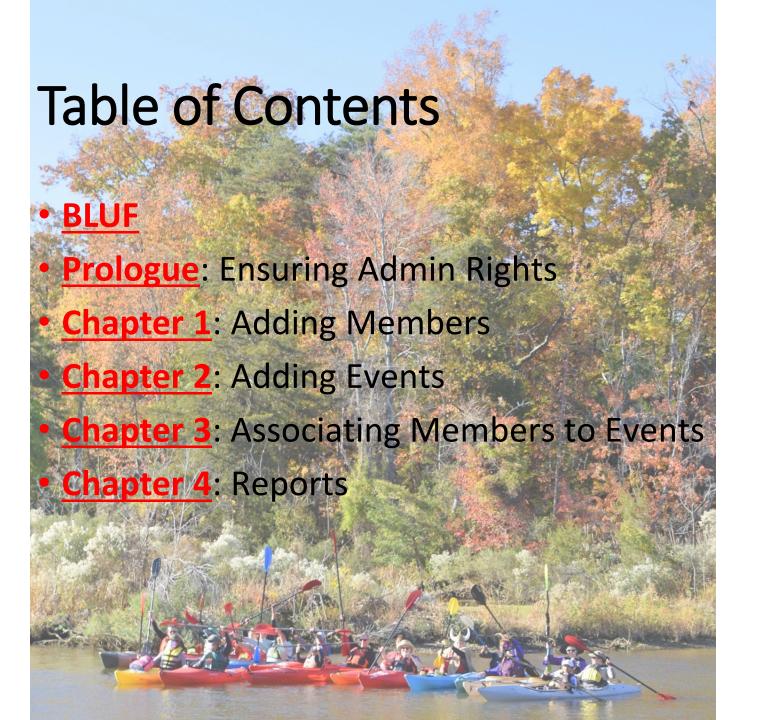


- How to use ORS as a Chapter Coordinator to properly record Veteran Attendance at Events
- Resources:
 - TRR Main Page: https://www.teamriverrunner.org/
 - ORS Link: https://ors.teamriverrunner.org
- Created by:

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1/5/2023





Bottom Line Up Front (BLUF)

- VA Grants are dependent on serving the Veteran Community.
- TRR must demonstrate its commitment to helping veterans by reporting quarterly to the VA the number of veterans touched.
- Veteran Attendance and Events recorded in ORS is used to determine your Chapter Status.
 - Golden Paddle 22+ events, 15+ veterans per year (21 in 2022)
 - Lifestyle 12-21 events, 6-15 veterans per year (9 in 2022)
 - Probational 0-11 events, 0-5 veterans per year (13 in 2022)*
 *20 chapters did not record events in ORS for 2022 (43 of 63 did)
- ORS was provided to TRR for free, and thus has limitations and "quirks". There is a process in place for improving ORS.
 Please be patient. We must work with it as it is, not as we wish it would be.

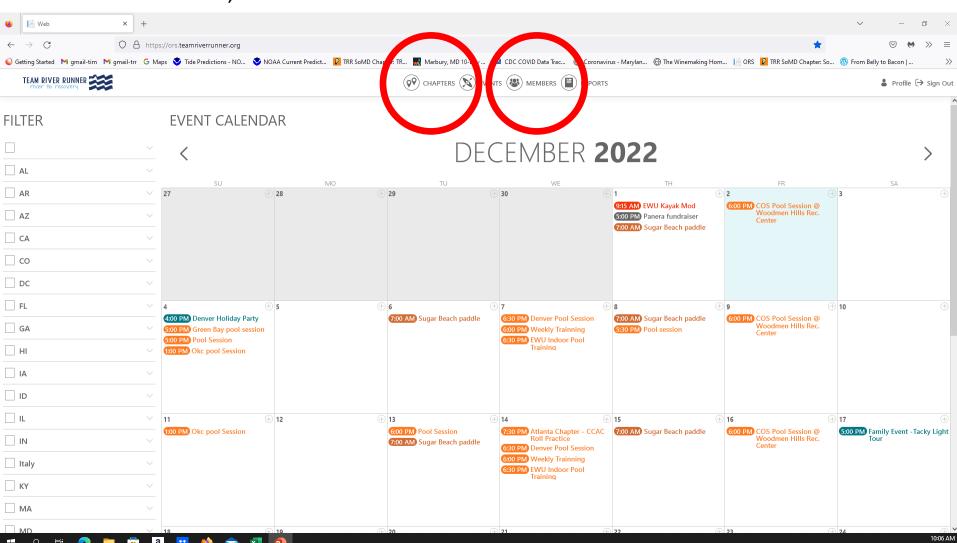
Prologue: Ensuring "Admin" Rights

• If you are the Chapter Coordinator or Designated ORS Facilitator for your chapter, Then you need to verify that you have the proper permissions.

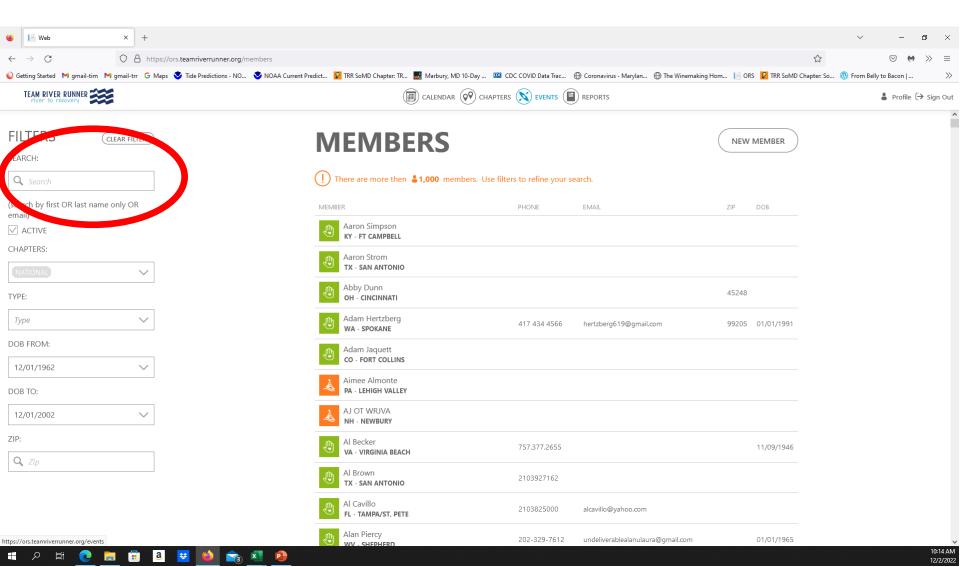
- The following steps will walk you through the process of verifying that you are an "Admin" or how to set your status as an "Admin"
- Note: If you have been identified to TRR- National has a chapter coordinator, the following steps MIGHT have been done for you.

When you first log in, the default view is the Calendar Do you have Admin rights? If you see "Chapters" in the top bar, then you do.

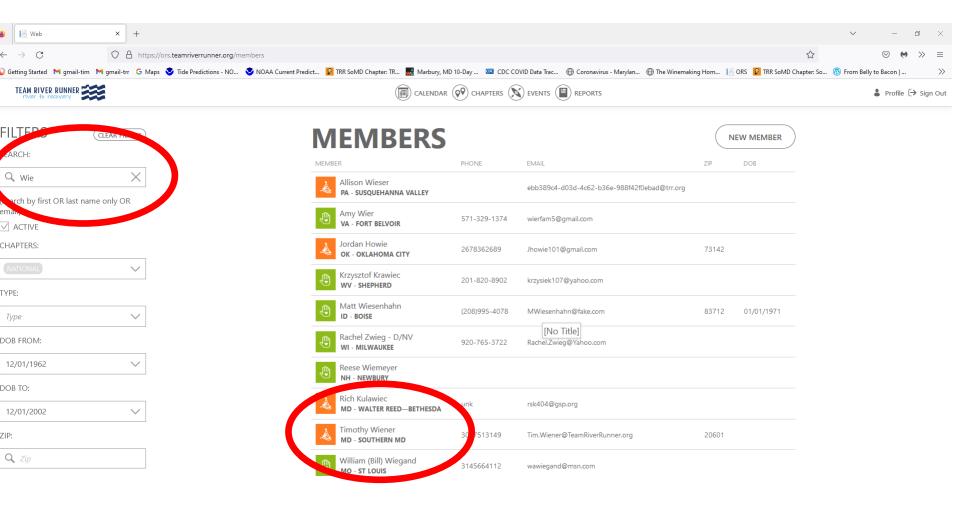
To Fix, Click on "Members"



Start typing your last name in the "Search" box

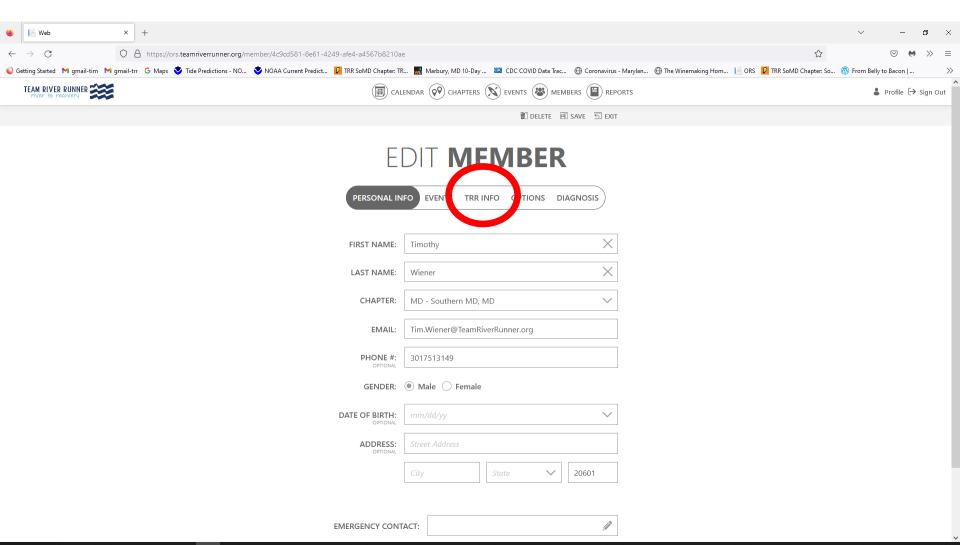


When the list is short enough to see your name, Select your name





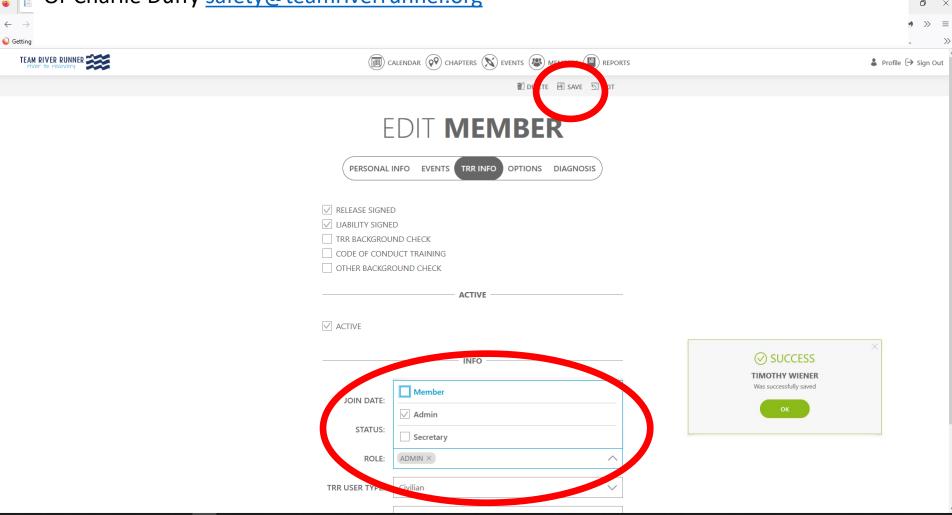
Select "TRR Info"





Expand "Role" and ONLY check "Admin"
Then Click "Save", you should see a "Success" box
If so, sign out and sign back in for changes to take affect.
If not, then contact:

Tim Wiener tim.wiener@teamriverrunner.org
Or Charlie Duffy safety@teamriverrunner.org

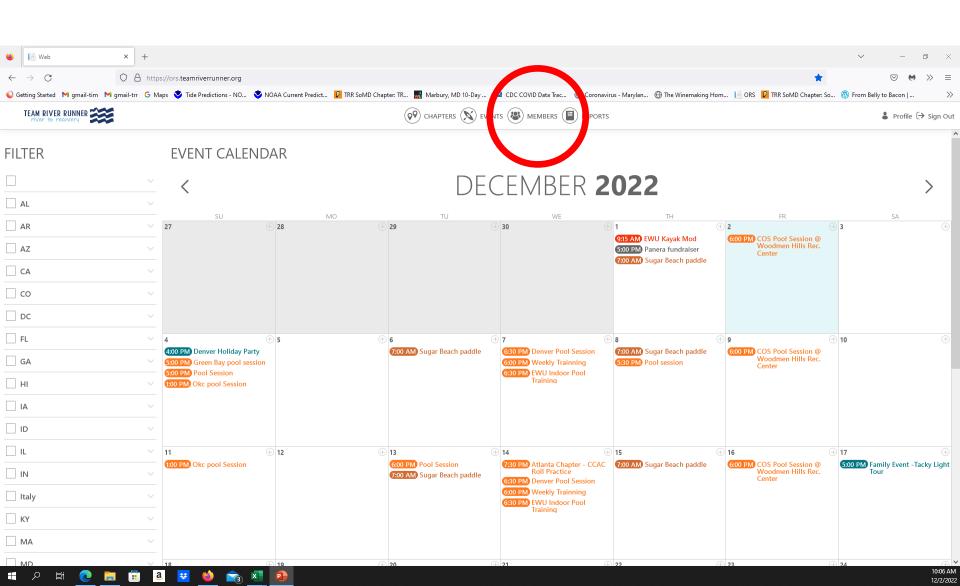




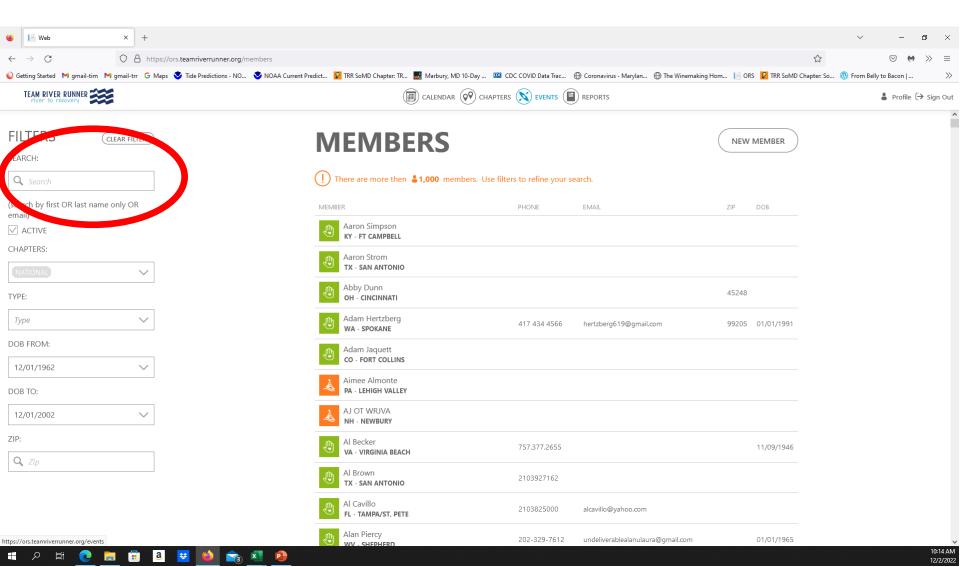
- There are 3 primary responsibilities for using ORS,
 Adding Members, Adding Events and Associating
 Members to Events
- The following slides will walk you through the process of adding Members to your Chapter

When you first log in, the default view is the Calendar

To add members, Click on "Members"

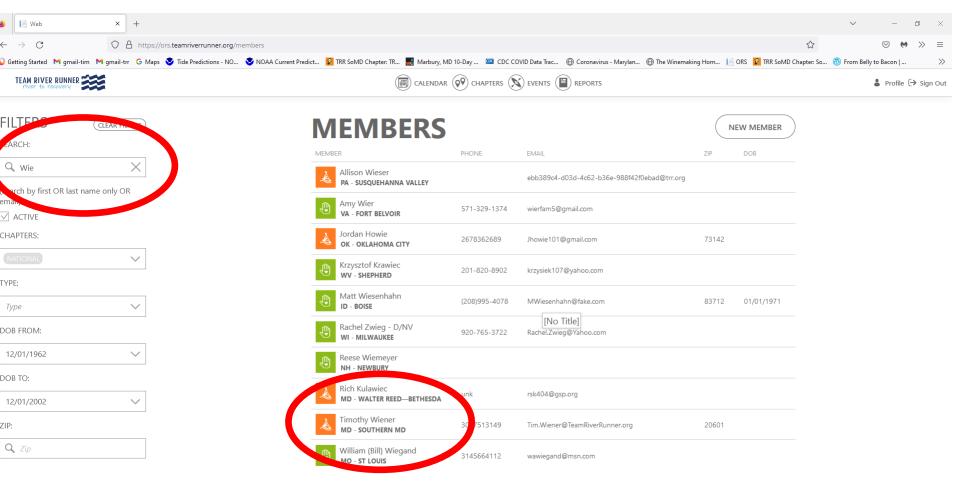


First, verify that the new member is not already in the system Start typing the last name in the "Search" box



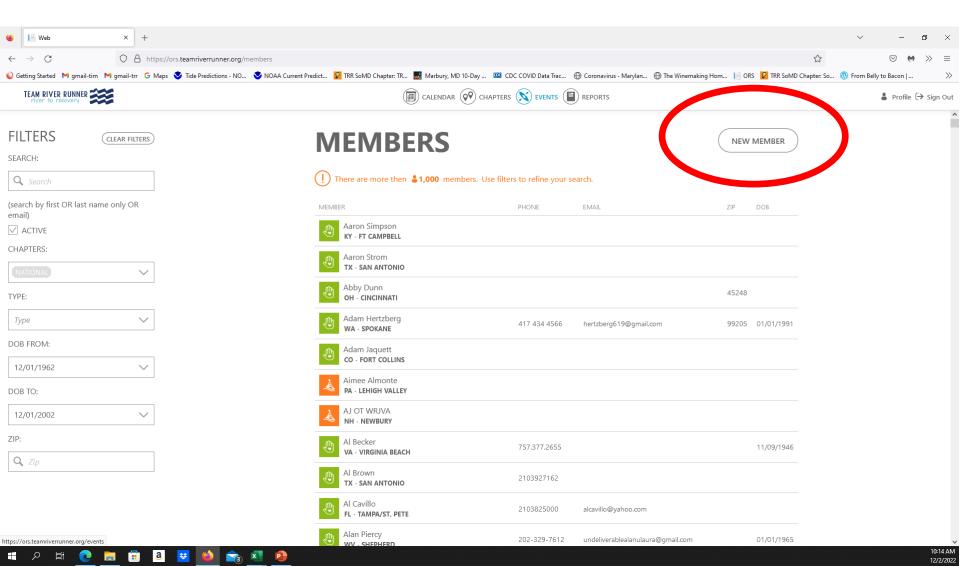
If you find that the "new" member is already in your chapter, you can Update their information (go to slide 19) or you are done.

If you find that the "new" member is already in another chapter, you must speak with the member to determine if they are just visiting your chapter or wish to transfer to your chapter. If they wish to transfer, Update their information (go to slide 19)





To Add a new Member, Click on "New Member"



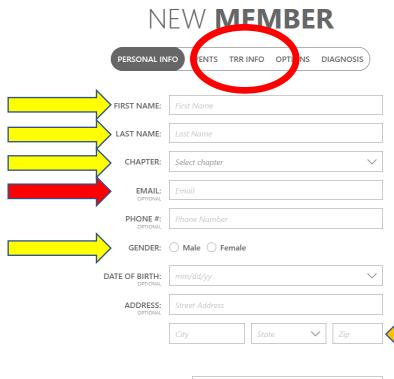
Enter Personal Info: You MUST enter a First and Last Name, a Chapter (drop down menu), Email Address, Gender, and Zip Code. All other information is optional.

When done, Click on "TRR Info"



Fields in "Yellow" are System mandated and you will not be able to progress to next step without filling in these fields.

Field in Red is a "Quirk" and system will not function properly if left blank.



EMERGENCY CONTACT:

Warning!!! Due to a "quirk",
NO two members may have
the same email address. This
could happen with couples, or
parent/guardian with
dependents.

If this happens, give "real" address to main member and create a unique "dummy" address for the other members, such as:

tim.wiener@gmail.com 1tim.wiener@gmail.com 2tim.wiener@gmail.com etc

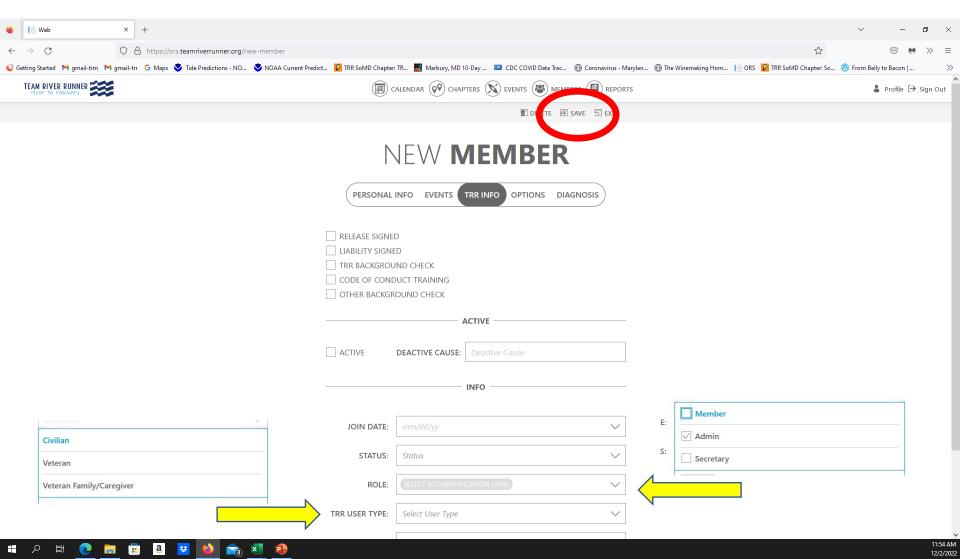
Field in "Orange" is required for reporting to VA.



Under "TRR Info" Fill in "Role" and "TRR User Type" (drop down menus)

If left blank, "Role" will default to "Member" upon saving

When done, Click "Save"

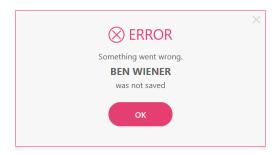


Upon Saving, one of 2 notices will appear.

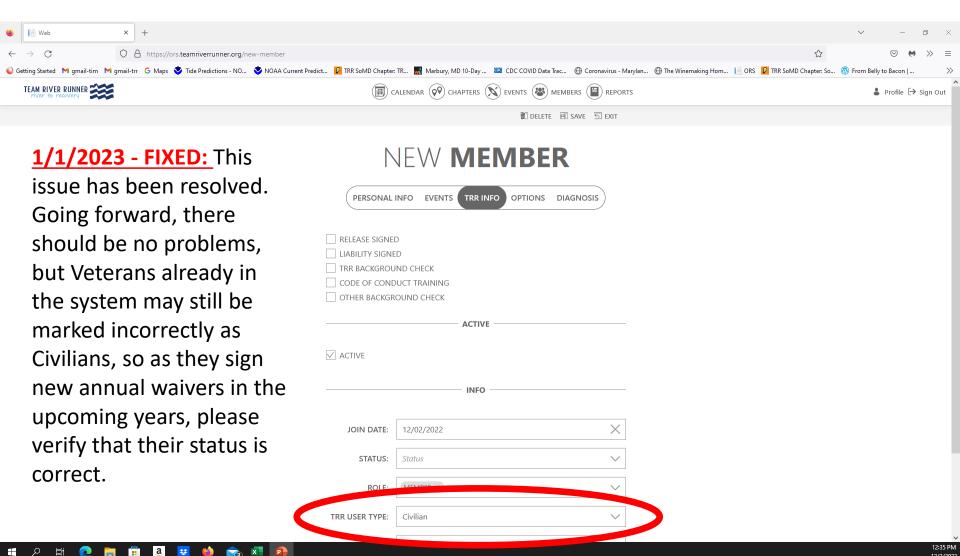
If "Error", the most probable problem is that the email address is already in use by another member. Click "OK", Go back to the Member page and enter the email address in the search field to find the member using that address. If "Found" member is the same as the "New" member but just a different name, update the fields accordingly. Otherwise determine if there is another email address the member wants to use or create a "dummy" email address as discussed previously.

If "Success", click "OK"

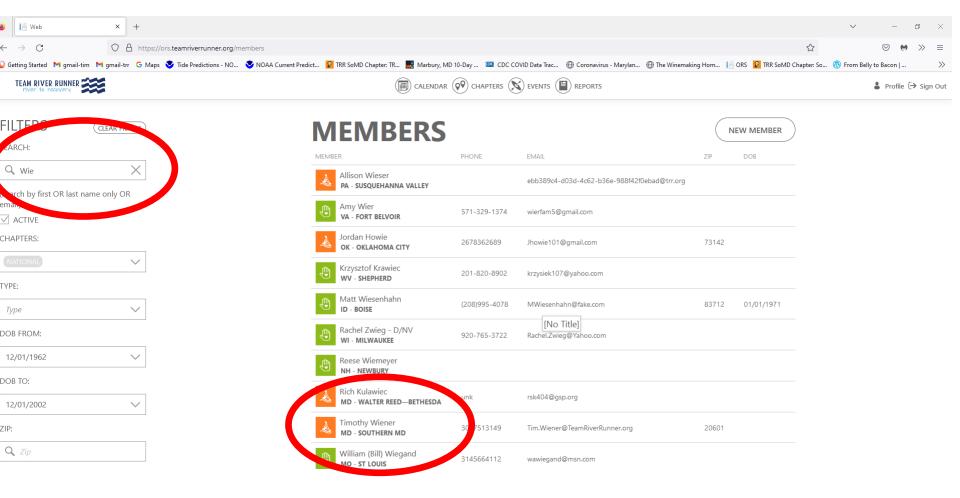




Due to a "quirk", upon saving the first time, the TRR User Type" will default back to Civilian. If required, set back to "Veteran" or "Veteran Family / Caregiver" and Save a second time. The setting will stay after being saved this second time.



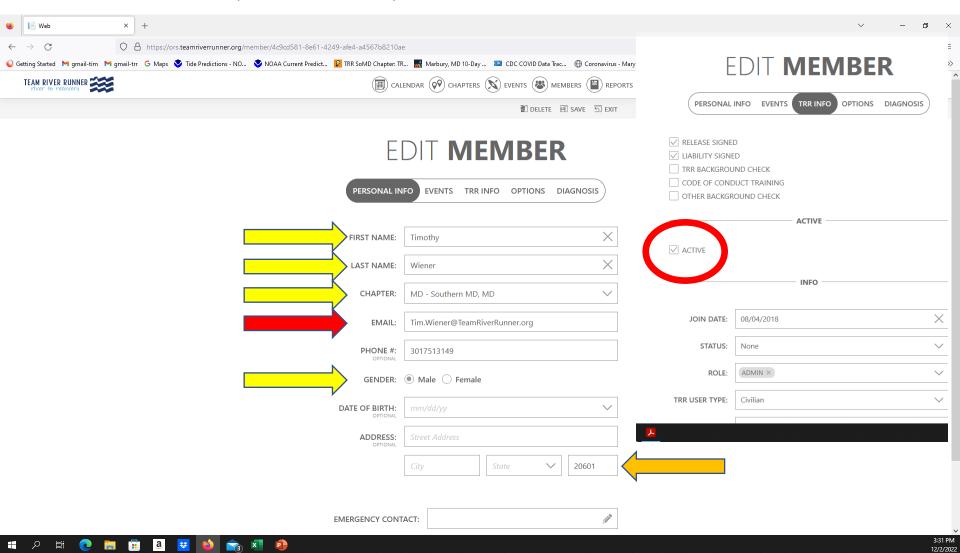
To Update a Member, find the member by typing their name in the search box and then click on the Member's name.



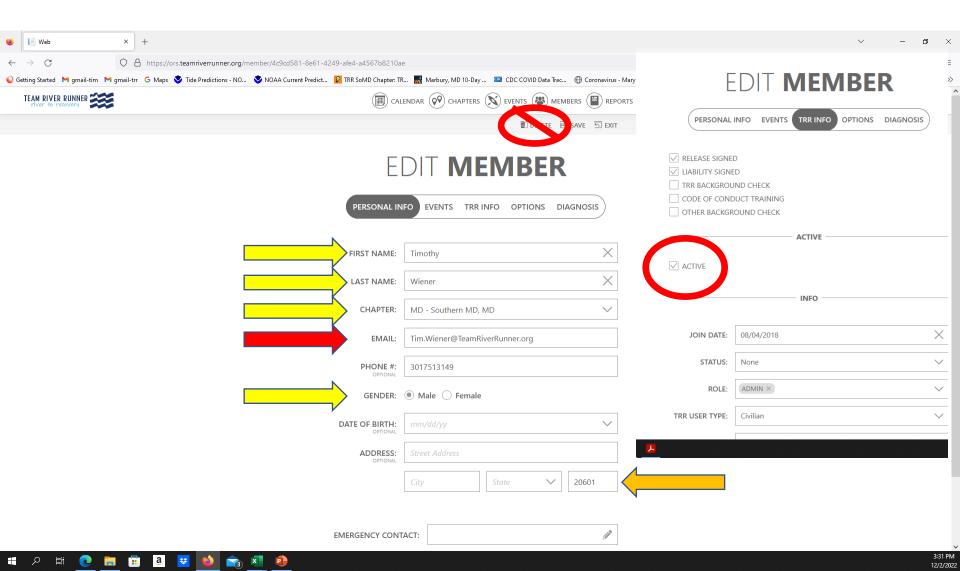


As when creating a new member, certain fields must be completed.

<u>Note</u>: due to a "quirk" in the system, DO NOT change the email address. If you must change the email address, the best practice is to create a New Member with all the same info as the current member but with the new email address. Then for the outdated Member, under TRR info, Deselect the Active box.



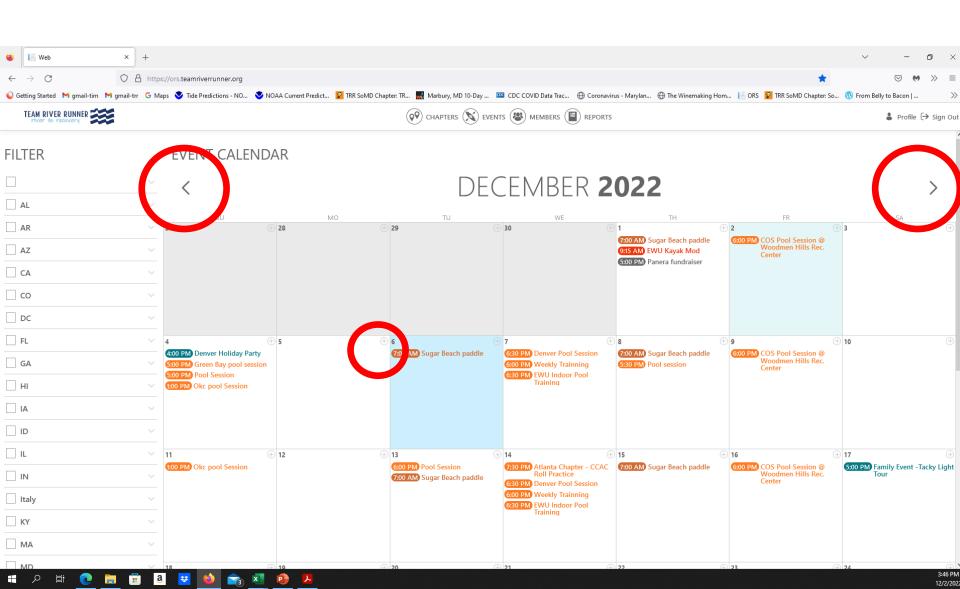
<u>Note</u>: due to a "quirk" in the system, DO NOT Delete a member. This will, unfortunately, delete their event history, altering attendance records for past events they attended. If you must "Delete" a member, the best practice is to open the record for the outdated Member, under TRR info, Deselect the Active box.



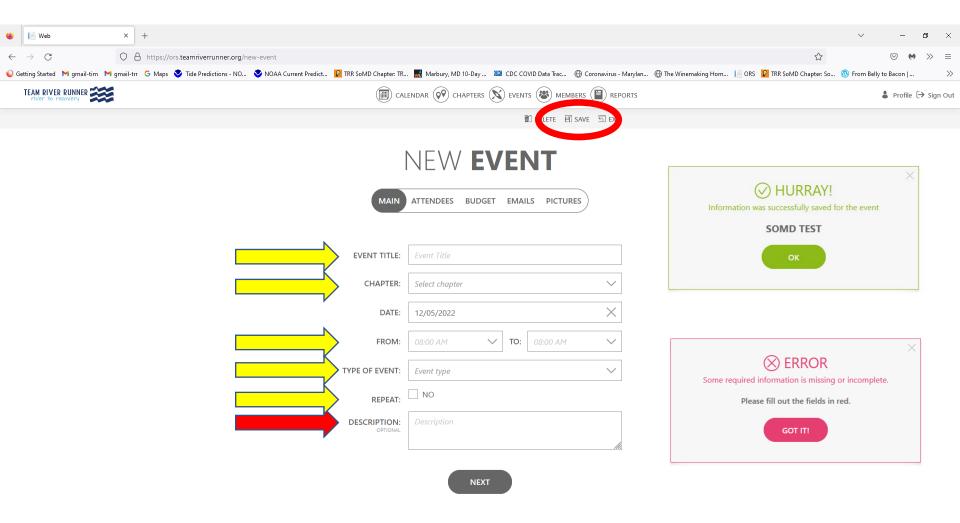


 There are 3 primary responsibilities for using ORS, Adding Members, Adding Events and Associating Members to Events

 The following slides will walk you through the process of adding Events to your Chapter To create an event from the Calendar page, Scroll left or right to find the date of the proposed event. In the upper right corner of the day is a faint "+" sign. Click it.

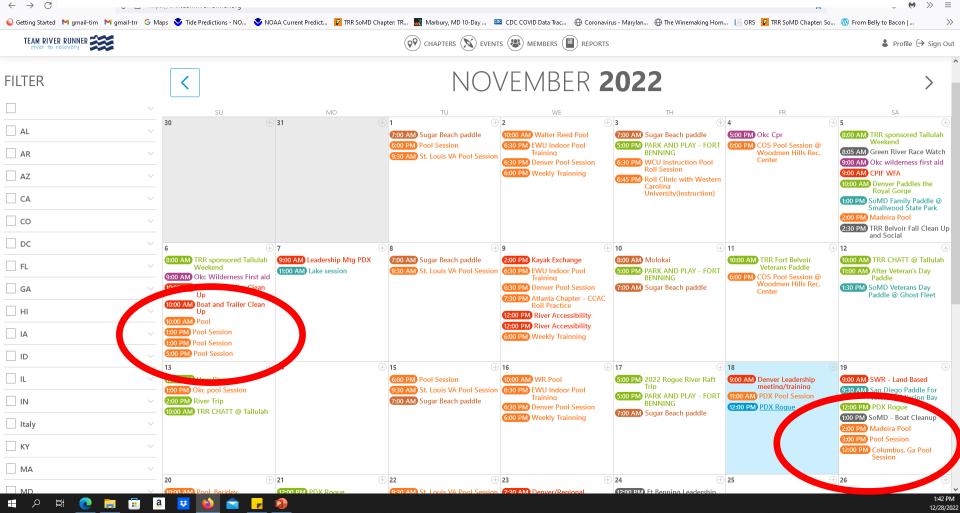


Give your event a title, select your chapter, select a time range, select the type of event, and provide a description (optional). Then Click "Save". If there are errors, fix them and save again. Your event should now appear on the Calendar.



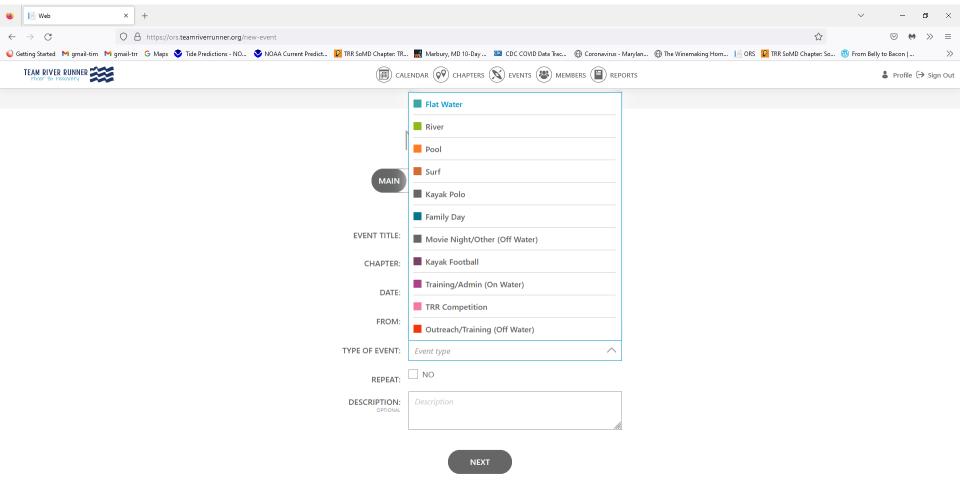
Note: Give your event a title that reflects the name of your chapter in some way, such as SoMD, PDX, etc. e.g., SoMD Pool Session or PDX Sandy River Float.

The ORS Calendar is visible to everyone that visits the main TRR website. If all 60 chapters create an event called "Pool Session" on the same day, it may become difficult for a local veteran to find "YOUR" session to attend.



There are several Event Types to choose from. Pick the one that best fits the event you are planning.

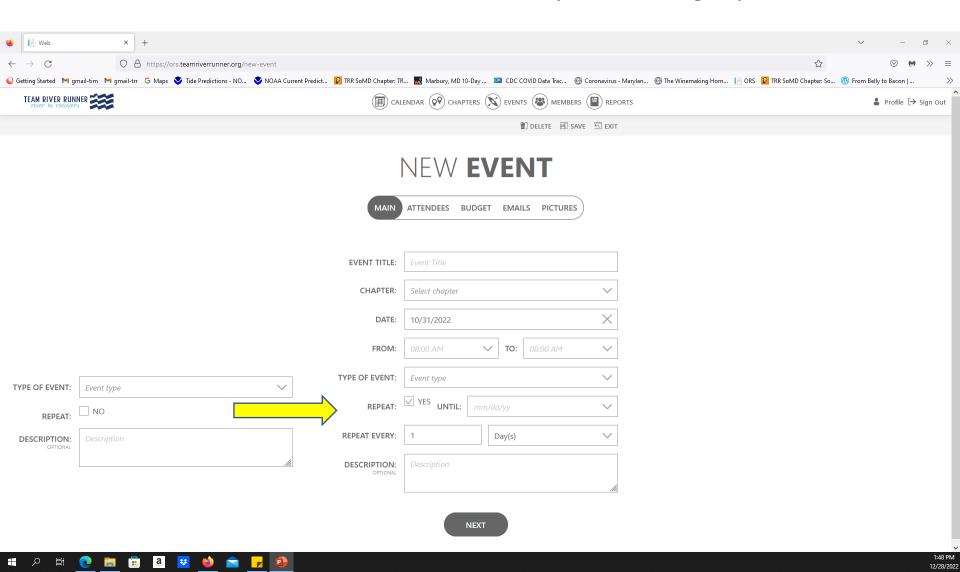
Also note that there are options for "Off Water" events to maintain group participation without necessarily needing to get wet.



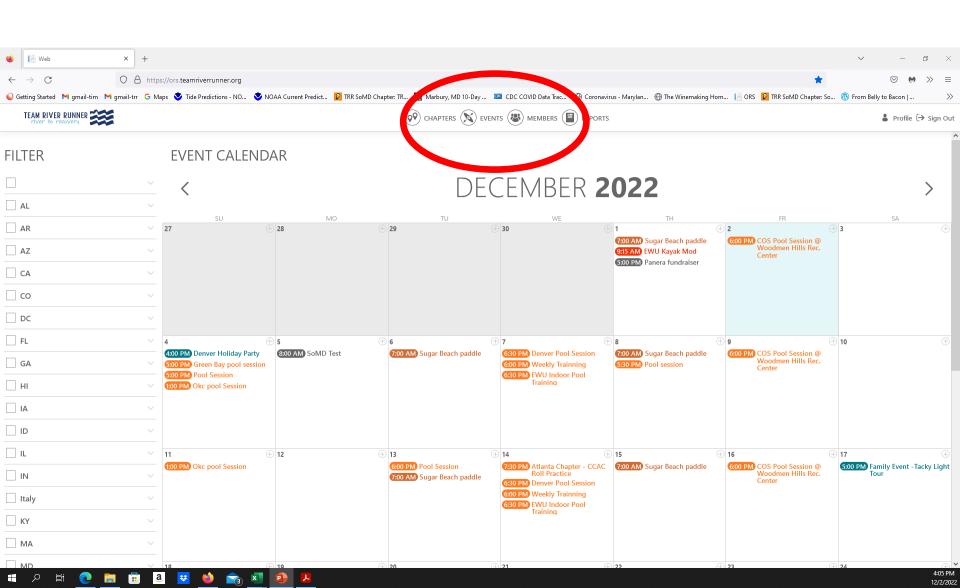


To create a multiday event or a series of events, Click the "Repeat No" to change it to a "Yes" and set the duration (Until) and frequency (Repeat Every) of the events.

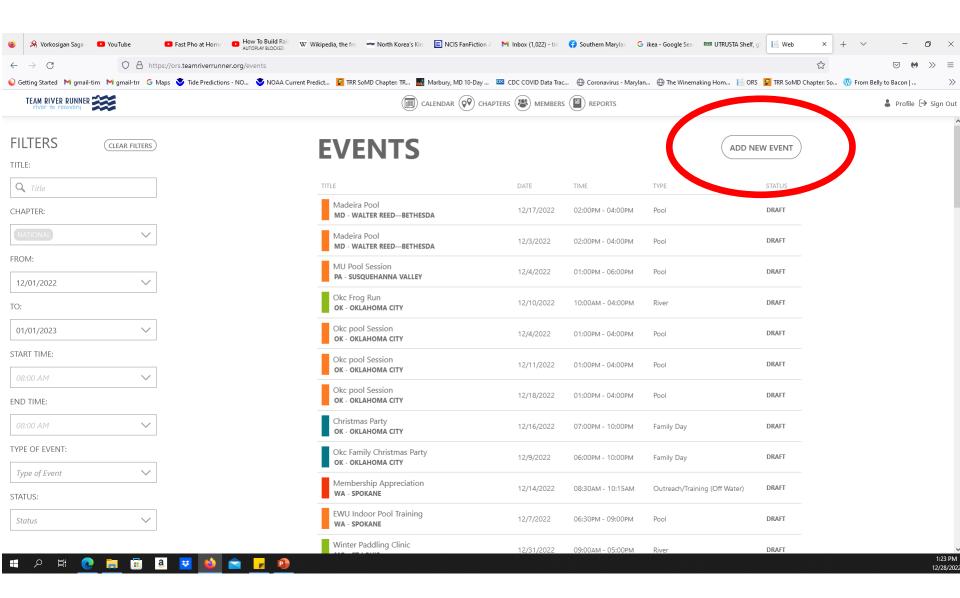
Once created, the events can be edited individually but not as a group.



Another way to create an event, is to open the Event tab in the upper banner....



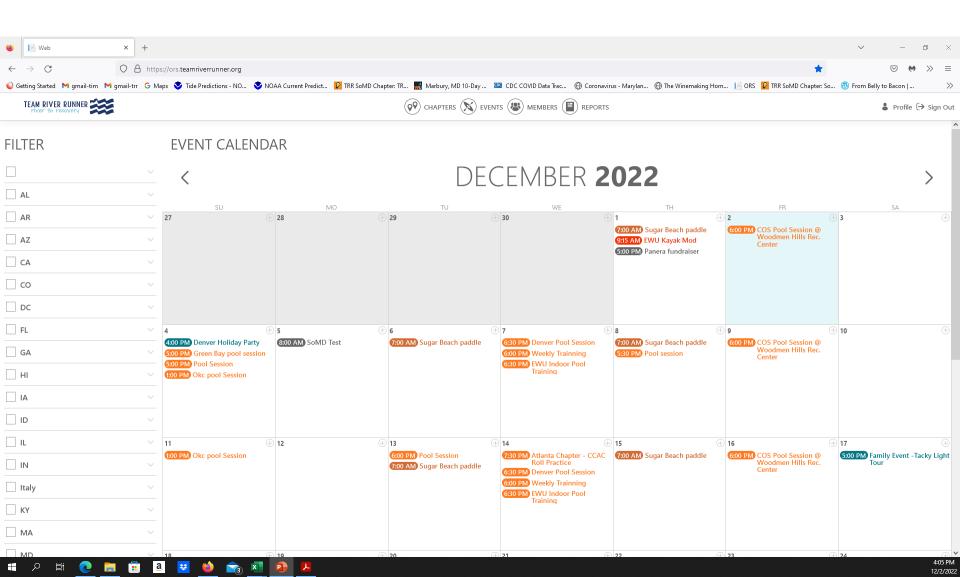
Then Click "Add New Event". This will bring up the same "New Event" page as seen previously.



Chapter 3: Associating Members to Events (Adding Attendees)

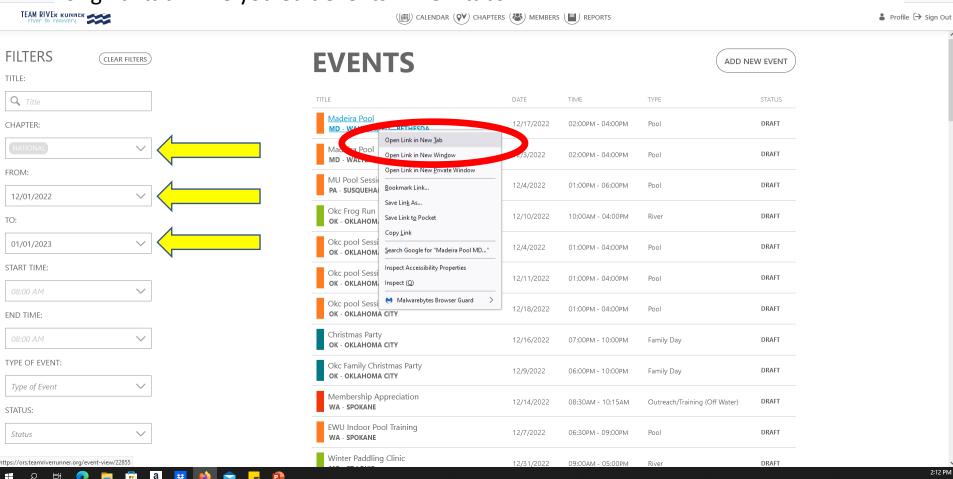
- There are 3 primary responsibilities for using ORS, Adding Members, Adding Events and Associating Members to Events
- The following slides will walk you through the process of associating members to Events by Adding Attendees.
- These steps can also be used to Edit/Modify or Delete an Event

Find the Event that you want to Add Attendees to (or Edit or Delete). This can be done by scrolling through the Calendar and clicking on the desired Event or.....

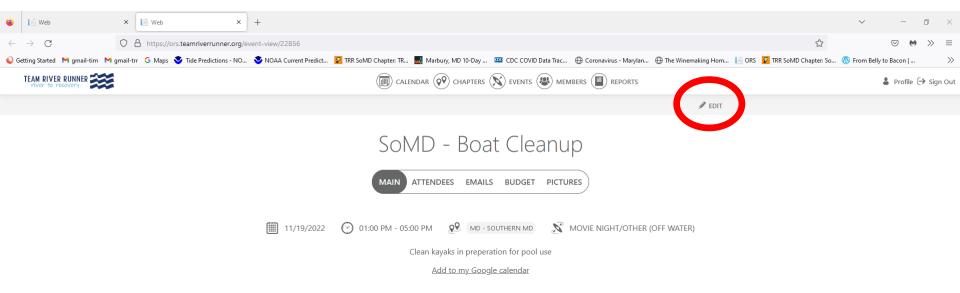


...Go to the Event Tab and Filter the events by Chapter (and Date Range if needed) to locate the desired event. If you are going to edit multiple events, this is the best way.

NOTE: ORS will not remember your filter settings. To maintain the list of events, when selecting an event to edit, Right Click on the name of the event and select "Open Link in New Tab". This way your list of events will be maintained in the original tab while you edit events in new tabs



On the Event page, Click Edit

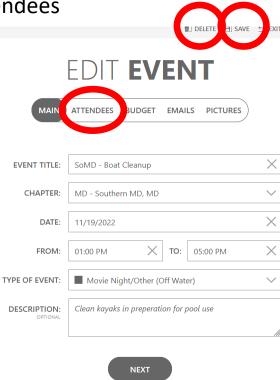


From here, you can edit the Title, Chapter, Date, Time, Event Type and Description. After editing (and after adding attendees) Click on Save to save your changes.

<u>Important!!</u>, You MUST delete events that do not have any attendees. If you need to delete an event (cancelled due to weather or lack of attendees, etc) you can Click Delete.



To Add Attendees, Click Attendees

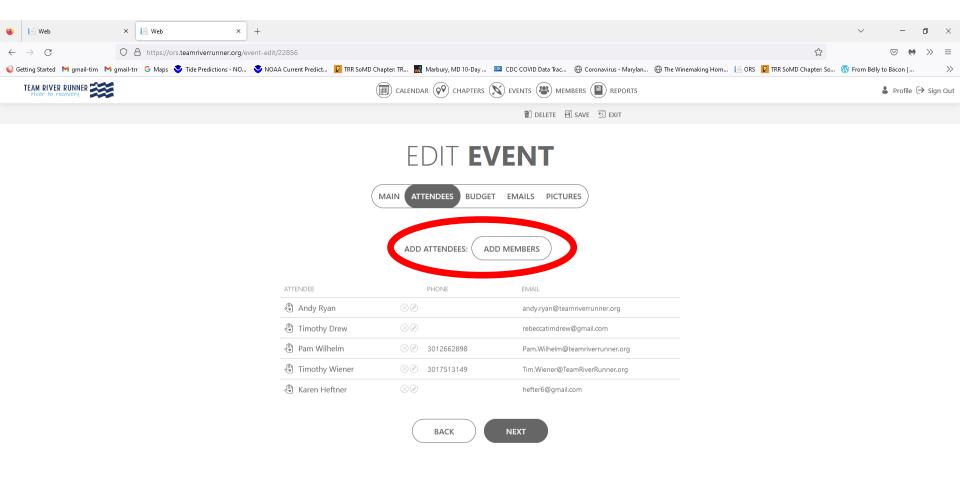




>> **=**

le (→ Sign Out

To add attendees to an event, Click Add Members

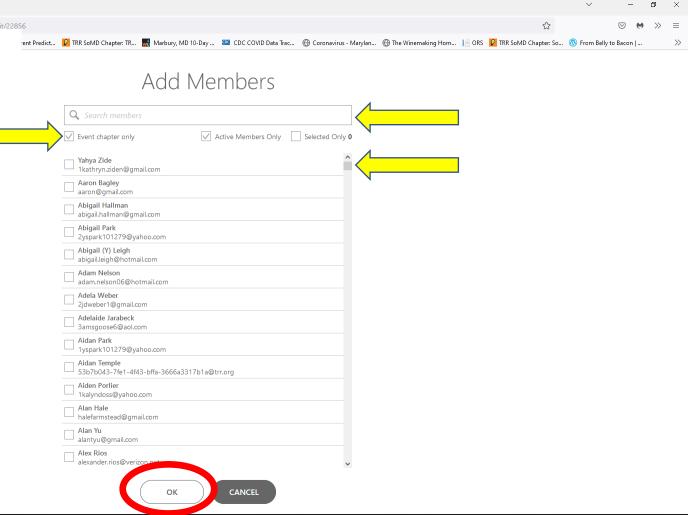


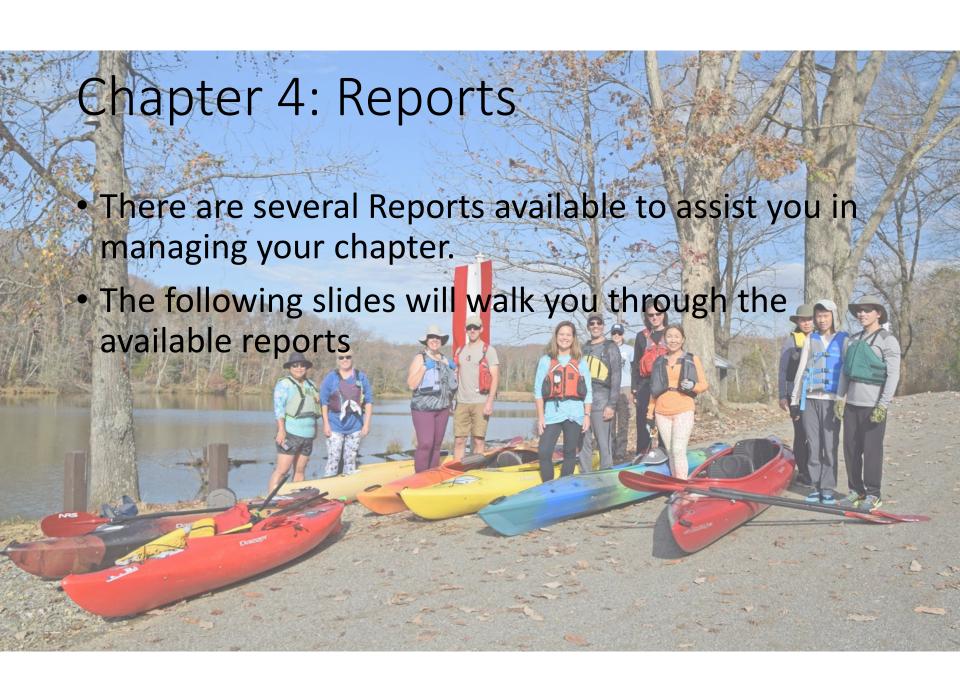
From this page you can use the scroll bar on the right to search for the members that attended your event, clicking the box to the left of their name. Optionally, you can search for a member by typing their name in the Search box and ORS will immediately start to filter the list of names. Once all attendees have been checked, Click on "OK" at the bottom of the page.

If you had someone attend your event but can't find them in the list, it is possible that they were visiting from another chapter.

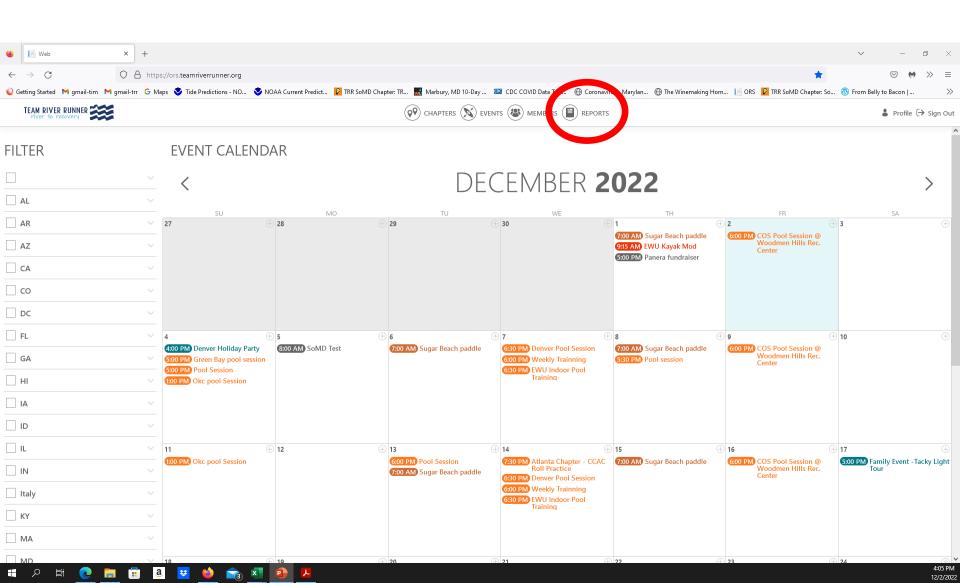
By default, the list of members is filtered to only show members of your chapter. If a member from another chapter attended your event, uncheck "Event Chapter Only" and then you will be able to search through all members of every chapter.

If you still can't find the attendee its likely they have not yet been entered into ORS as a member of your chapter. Save the Event, Add the attendee as a member, then return to the event and Add them as an attendee.





To run a report, Click on Reports in the upper banner



There are 5 canned reports that can provide information concerning the health of your chapter. These are shown below. Clicking on the Icon of the report will open the report.



REPORTS



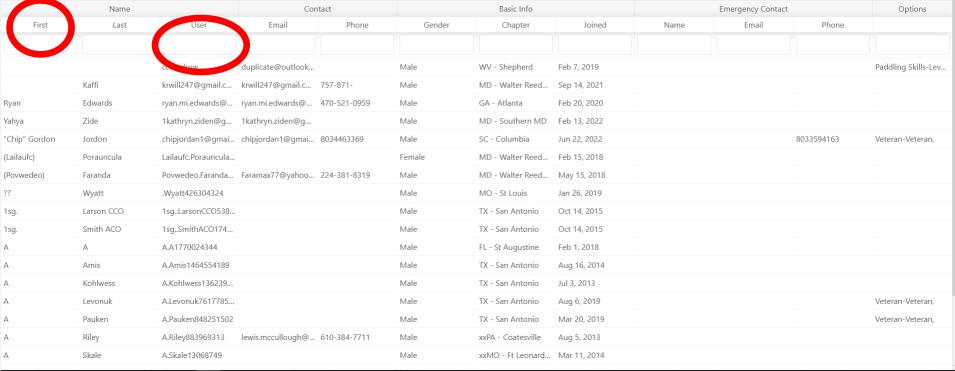


The Members Report lists every member of every chapter in ORS, not just veterans. For every report, clicking on the name of the field once will sort the report alphabetically by that field (i.e. clicking on First name will sort the report alphabetically by first name). Clicking the field twice will sort the report in reverse alphabetical order.

Each field can be filtered by typing in the box below the field name. Caution it is case sensitive!.

The Members Report can also be exported as an Excel CSV file in order to use the full tool suite available in Excel.

MEMBERS REPORT





TEAM RIVE





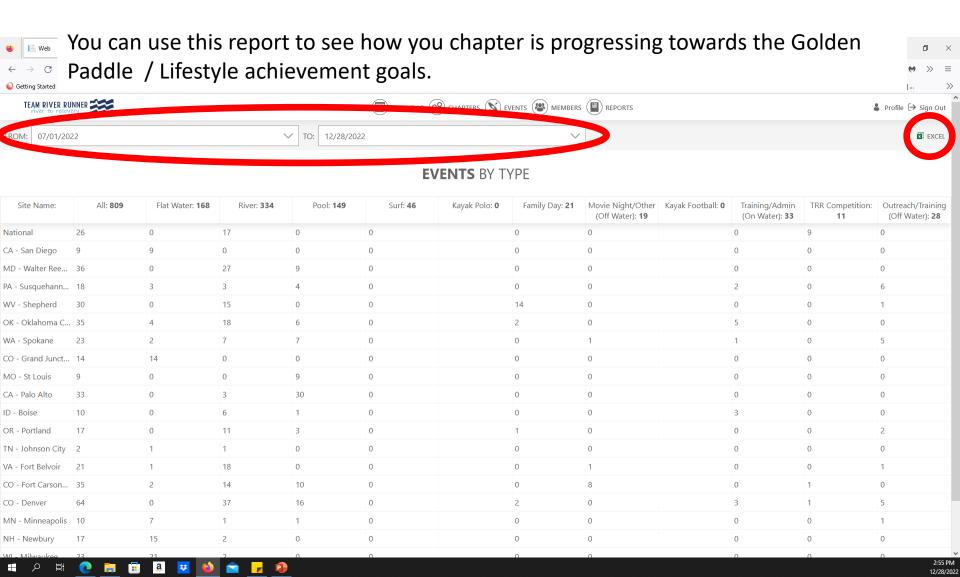




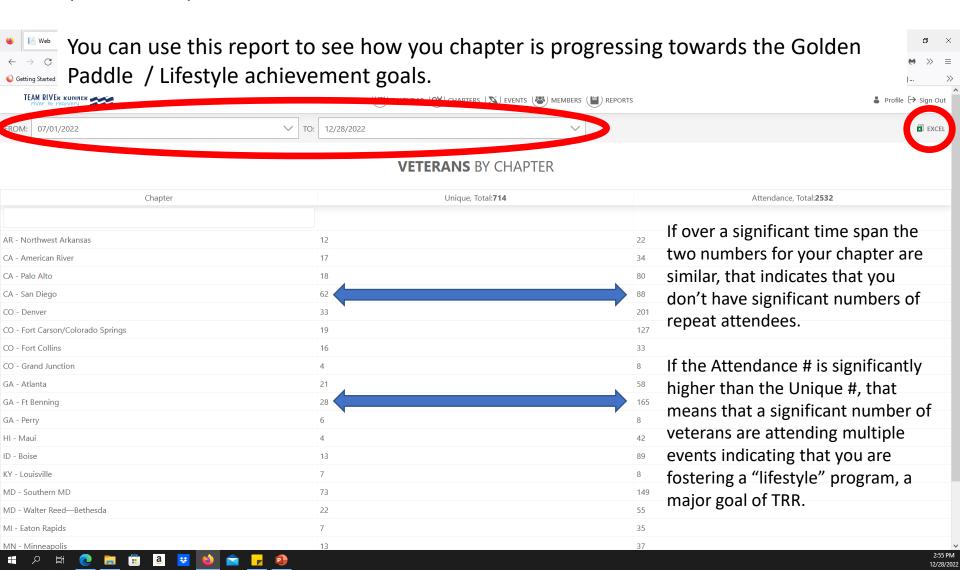




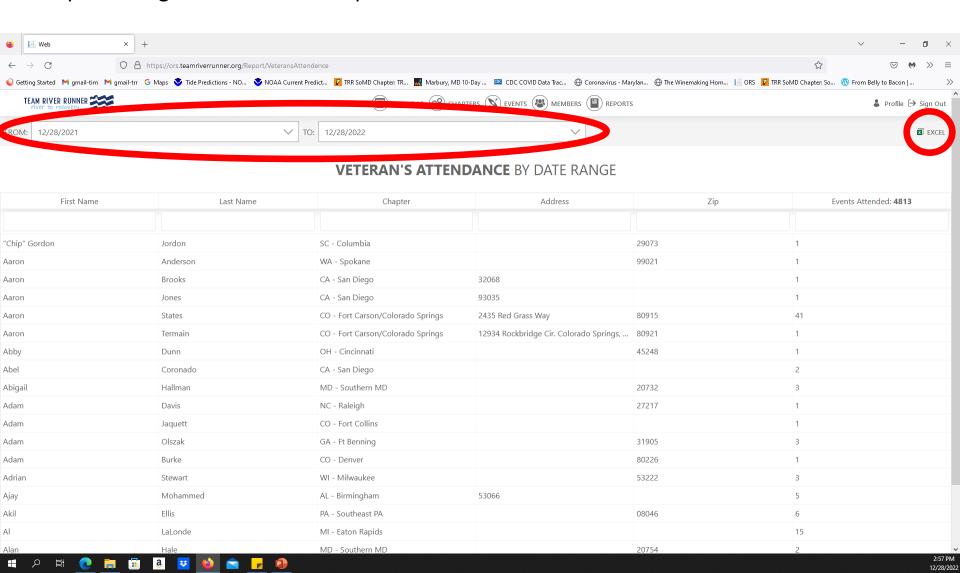
The Events by Type Report lists how many of each type of event were conducted by each chapter during a specified date range. You can adjust the date range to fit your needs. By sorting each event field, you can see how your chapter compares to other chapters. And this report can also be exported to Excel.



The Veterans by Chapter Report may be the most useful. It shows the number of veterans that have attended events by chapter during a specified date range. It displays the number of individual (Unique) veterans that have attended at least 1 event and the total number of times those unique veterans have attended events (Attendance).

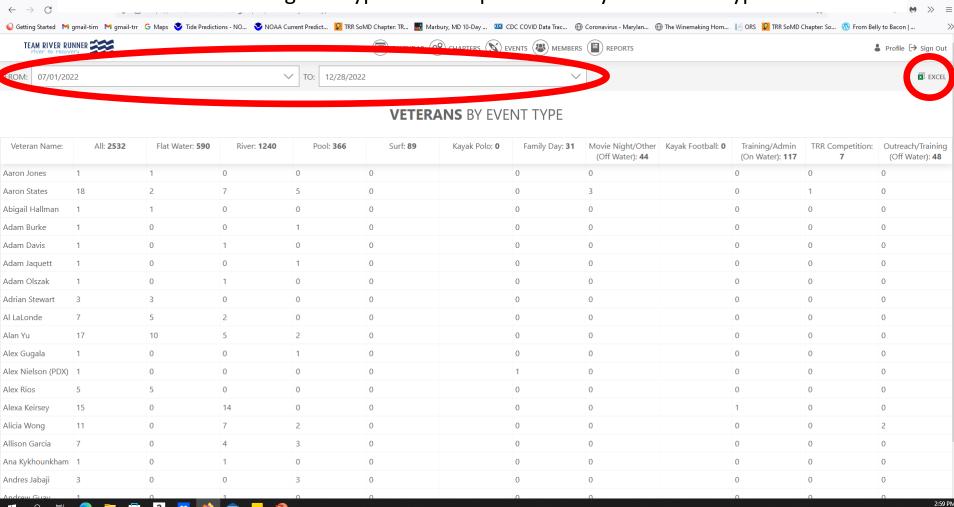


The Veteran's Attendance Report lists every veteran that attended an event during a specified date range, and how many events that veteran attended. This report could be used to highlight very active participating veterans for accolades and or promoting them for leadership roles.



The Veterans by Event Type Report lists every veteran that attended at least 1 event during a specified date range and how many of each event type they attended. Each field can be sorted but not filtered.

If your chapter conducts multiple event types, you could use this report to determine if a veteran is attending one type of event preferentially over other types of events.



Conclusion

Things to remember:

- Update ORS Members, Events and Attendance frequently at least monthly, preferably immediately after each event.
- ➤ When adding a new member, after saving, reset the TRR User Type back to Veteran or Family Member
 - FIXED due to this bug, veterans currently in ORS may be incorrectly listed as "Civilian", so verify status as new annual waivers are submitted.
- Members must have unique email addresses
- If an email address must change, create a new member and mark old member record as "Inactive"
- Do not Delete a Member, mark member as "Inactive"
- Delete Events that have no Attendees
- If an Attendee does not appear in the list of Members to be added to an Event, They may be a Member of another chapter or have not yet been added to ORS

Thus concludes this tutorial. If you have any additional questions or suggestions for topics to include in this tutorial, feel free to contact:

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