Ride Coordinator's Manual

The Ride Coordinator interacts with the website in three ways:

1. They are the person who adds a new ride leaders and gives the necessary access rights
2. They create and publish the rota for ride leaders
3. They can, if needed, delete a person's booking

To do any of the tasks, they must log-on to the website with their Username and password.

1. Add a New Ride Leader

New ride leaders will already have their details on the list of People under the EME Booking menu (because they will have previously been booked onto one of our rides).

So to make a person a ride leader we have to do four things:

a. First, give them the rights that they need to be able to update the details of the rides to which they have been allocated.

b. Second, to put them into the Group called "Current Ride Leader" so that they are shown under the list of current Ride leaders in the membership page.

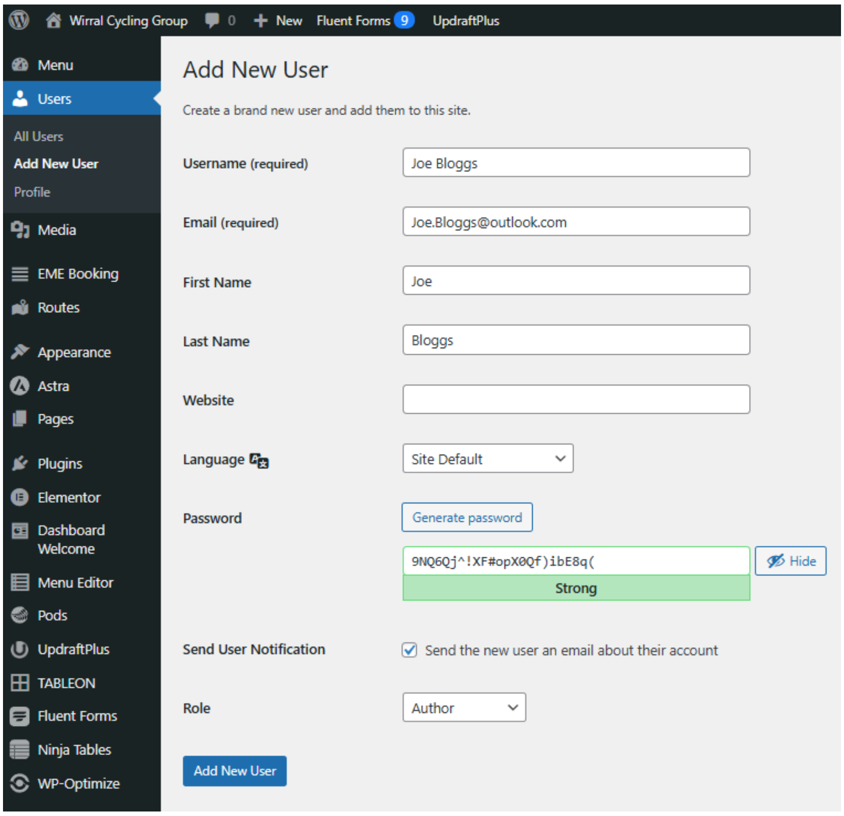
c. Third, log on to make sure that their access is working correctly.

d. Finally, tell them that they have been added as a ride leader and send them instructions on how to add or change details of their allocated rides

a: Give the new the ride leader the access rights that they need

The new ride leader needs rights to add, change or delete rides and to do that they need to be a Wordpress User with the role of Author (an Author can alter their own content, but cannot change or delete documents created by other users).

To add a new user go to the Menu item "Users" and click on Add a New User.



Enter their first and surname as the Username

& email address

their first name

and surname

Change the password to something simpler (we tend to use their mobile number). They can change it later.

Remove the tick from Send User Notification

Leave the Role as Author

Press the Blue button to add them as a user.

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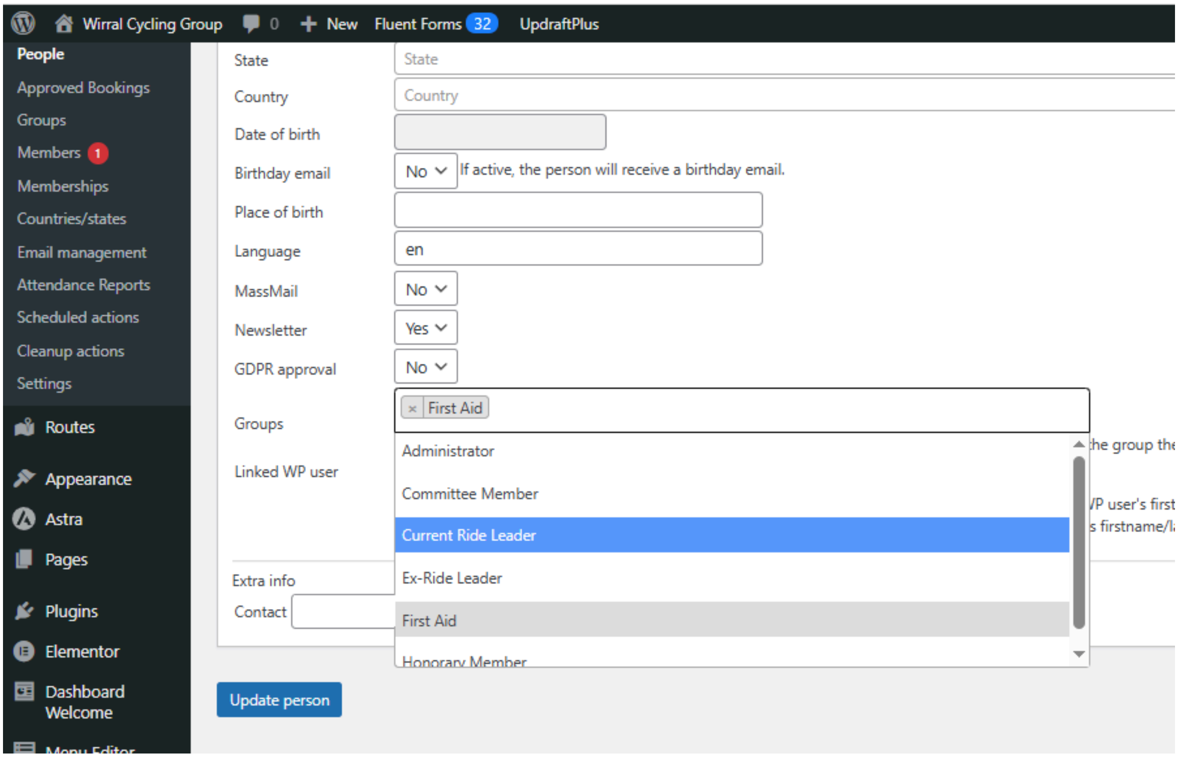
b: Add the new ride leader to the Ride Leaders’ group

We put Ride Leaders into a group so that committee members can see who the current ride leaders are, and so that they can speak to or send emails to any or all of the ride leaders.

To add someone to the Current Ride Leaders group, open that person’s EME People record, go to the box entitled Groups, click on the line “Current Ride Leader” in the pull-down menu.

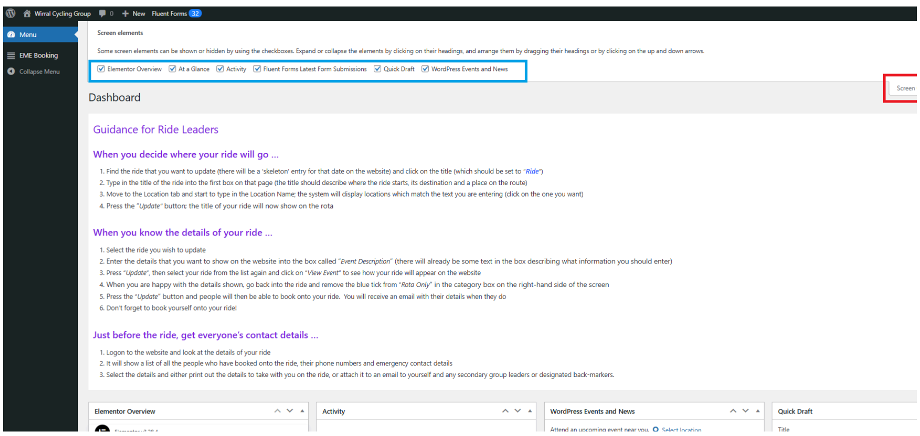


Also click on the Linked WP user box and select the new ride leader’s User Name.

When you have entered (and checked) all the details, press the blue “Update person” button and their details will be added to the Current Ride Leaders’ Group.

c: Test that they can log-on as a ride leader

It is always a good idea to make sure that what you have done works; so logon to the website using the new rider leader’s Username and password to make sure they work.



While you are logged on, it is worth suppressing the display of the Wordpress boxes (they are no use to the ride leader).

So go to the Wordpress Menu, pull down the Screen Options (top right), and un-tick all the boxes.

d: Send the new ride leader instructions on how to add or change details of their rides

Now send a message to the new ride leader to tell them

- that they now have access to the website as a ride leader
- about the Ride Leader Rota, how it is set up, and where to find it
- how to log in and add or change the details of their ride (there is a document on the website with detailed instructions)
- to contact the ride coordinator if they need to change the date when they are scheduled to lead a ride or if they need any help with entering the details.

Draft of an email to send to new ride leaders:

I have added your details as a ride leader on the WCG website. This allows you to log-on and get 'behind the scenes' of the website so that you can add, change or delete the details of any of the rides for which you have been nominated as ride leader.

Once a quarter I publish a rota for ride leaders for the following three months which assigns dates to each ride leader in turn. You can see that rota by looking at the "Rota" page on the web site (top right of the menu on a computer, or press the symbol with three horizontal lines on a phone and click Rota), or by clicking here: https://wirralcycling.org/rota/.

If, as a ride leader, you need to change the date when you lead a ride (because of holidays or other commitments), then just let me know and I will shuffle the dates.

To log-in to the website, press the Green login button at the top of the Home page, or on the top right of the Rota page. Enter your Username and Password . Your username is your first name and surname with one space between: your password is your mobile phone number with no spaces. Detailed instructions on how to enter details of your rides (or change those details later) are available in the Document Library section of the website under the Advice for Ride Leaders section https://wirralcycling.org/documents/.

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2a. Prepare a Ride Rota for the next month or quarter

In essence preparing the ride rota is a simple task. Just assign each of the ride leaders available (in sequence) to the dates on which the group plans to run rides. That way each ride leader will lead the same number of rides.

However, there are some complications and constraints to be taken into account.

We don’t want to overburden ride leaders and so we say that we won’t ask them to lead a ride more than once per month. But if we aim to have three rides per week, that is over 150 per year and so we need at least 13 ride leaders. If we have fewer ride leaders then we will have to run fewer rides per week.

That said, some people don’t want to lead a ride every month, but are willing to lead one every two months. So to accommodate them we have shared ride leader slots, where two people share one ride leader slot and so lead a ride on alternate dates.

Currently we aim to run two rides every Wednesday and one every Sunday; but some ride leaders can only ride on a Wednesday and some only on a Sunday. So once the ride leaders have been assigned to dates, we may have to shuffle people between Wednesdays and Sundays to get them onto a day of the week when they can lead.

We also need to take account of the type of rides that people want to lead. Some ride leaders want to lead mostly Grade D rides and some mostly Grade B rides. That is fine because it gives a diversity to our rides, but when scheduling the rota, we want to ensure that rides of the same grade are spread out across the available dates. We don’t want to have two grade D or two grade B rides on the same day.

The best way to achieve this is to organise the sequence of ride leaders on the rota and keep people who like to lead Grade D rides away from each other, and people who like to lead faster Grade C or B rides away from each other, and also separate those who can only lead on a Wednesday from each other; and those who can only lead on a Sunday from each other. Trying to satisfy all the criteria can get complex.

Your objective is to produce a list of dates with available ride leaders something like this:

Sunday	5th January	Ride leader 1	C
Wednesday	8th January	Ride leader 2	C
Wednesday	8th January	Ride leader 3	C
Sunday	12th January	Ride leader 4	C
Wednesday	15th January	Ride leader 5	B
Wednesday	15th January	Ride leader 6	D
Sunday	19th January	Ride leader 7	C
Wednesday	22nd January	Ride leader 8	C
Wednesday	22nd January	Ride leader 9	D
Sunday	26th January	Ride leader 10	C
Wednesday	29th January	Ride leader 11	C
Wednesday	29th January	Ride leader 12	B
Sunday	2nd February	Ride leader 13	C

But once the rota has been published you will always find that some people want to go on holiday, have other commitments on a particular day, or get sick or injured. So your beautifully balanced rota will have to be changed to fit the new circumstances.

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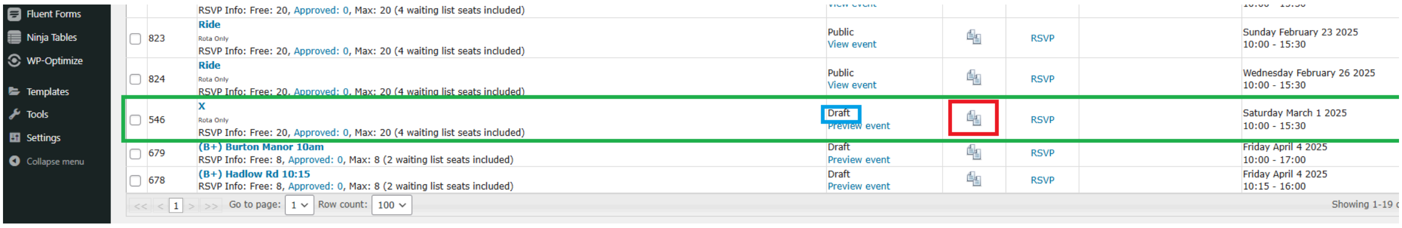
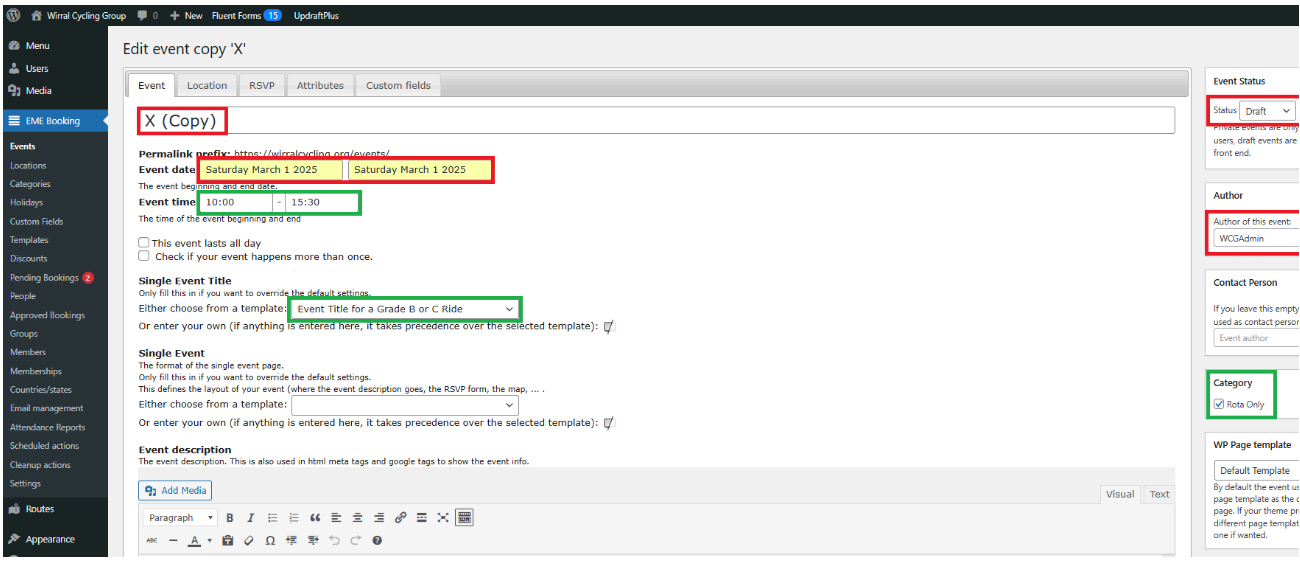
2b. Create an Event Record for each ride on the new Rota

To make sure that any new record created by the ride coordinator has all the necessary fields set correctly the ride coordinator creates each new record by making a copy of a standard record. This standard record is normally kept near the end of the Events list (moved there by changing the date on the record), has the title X (to indicate it is not a real ride), and has its status set to Draft (so it’s not visible on the website).



To create a new ride record, the ride coordinator makes a copy of the standard record by clicking on the Copy Icon (shown above in red). When creating multiple new records, it is best to make copies of the standard record by right-clicking on the Icon and then Opening the Link in a New Tab; that way the List of Events stays as it is to make the next copy.

Once they have created the copy, the ride coordinator should change the title of the copy from ‘X (Copy)’ to ‘Ride’, change the Status from ‘Draft’ to ‘Public’, change the date to the one for which the ride is scheduled (NB Each event has a start and an end date, which for our rides should be the same) and they can then choose the Ride Leader’s name for that date/ride from the drop down list in the “Author” field (typing some letters in their name will reduce the size of the drop down list).



The ride coordinator should also check that the defaults on the record (shown above in Green boxes) are correct; the start and end time default is 10:00 to 15:30, the Single Event Title is set for B or C rides (the ride leader can change this later for their ride) and the “Rota Only” Flag in the category box is still ticked (to stop the ride being open for bookings until the ride leader is has finished entering the details of the ride).

Don’t put anything in the boxes entitled “Single Event” or “Contact Person”. The Single Event box is there in case you want to use a special format for the booking form; if you put anything in the box, no-one will be able to see the standard ride booking form. Also the system automatically sends emails to the Author (Ride Leader) when people book onto or cancel their place on the ride. If you put anything in the Contact Person box, the system will send the emails to the person whose name is in that box, not the Author (Ride Leader).

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Note that the Event Description will have some text within it (copied from the standard record) to explain to the ride leader what information they need to put in this box when they set up their ride.

The Ride Coordinator ‘Publishes’ the new record when they press the blue “Save” button at the bottom of the page. An entry will then appear on the Rota page of the website allowing the ride leader to add the details of their ride. The Ride Coordinator can then go on to set up the next new record using the same process.

New records should be created in batches of a month, a quarter or similar, so that the Ride Coordinator can send an email to all the ride leaders announcing the new dates that have been added to the rota; something along the lines of:

> *As usual I have just allocated ride leaders to dates in the order they are on my list (unless you have told me about your planned holidays or absences).*
>
> *Here is the rota that I have created: https://wirralcycling.org/rota/ for the three months to ‘dd/mm/yy’. If you can't, or don't want to, lead a ride on a particular day, please let me know and I will change the rota accordingly.*

The email addresses of all current ride leaders are shown when you are logged-in to the website at the bottom of the ‘Current Ride Leaders’ tab under ‘Membership Records’ on the ‘Library’ page. You can copy and paste those addresses from there into the bcc: section of your email app.

After they receive this email, Ride Leaders will be able to add the details for their ride (time, location, maximum number of riders allowed, the route, a description of the ride length and speed, lunch venue, etc.).

So that people have enough time to prepare for leading a ride, or to let us know that they cannot, we aim to publish the dates on the rota at least two months in advance. Whoever is preparing the rota could publish a whole year’s worth of dates in one go, but experience shows that that a year is too far in advance; people’s circumstances change and few people plan holidays or trips away that far in advance. We find that publishing three months' dates in advance is about right; it gives ride leaders enough notice, but doesn’t commit them too far in advance.

Once we have a proposed rota, we need to add event records to the website. A rota for three months with three rides a week involves adding about 40 records; so can be time consuming. The process is straightforward, but repetitive, and it is difficult to do repetitive tasks forty times without making mistakes!

The way we add event records is to have a template ride already set up, create a copy of the template ride for each slot on the rota and then add the dates and names of the assigned ride leader to that copy.

The template ride is set up as a Draft document, with an event date in the future (usually set to the end of the next period we plan to use (e.g. 31st March 2025 for the first three months of 2025). This template ride has many fields already set up correctly. These include the time of the event (default is to start at 10:00 am), the maximum number of riders on the ride (16) and the number of waiting list slots (4), the template for the Single Event Title (“Header for a Group Ride”,which displays a standard paragraph at the top of the ride details page), plus words in the Event Description to remind the ride leader what they have to put in a description and how to post those details. It also puts a tick in the box marked Rota Only, which stops the ride details being displayed on the website until that tick is removed.

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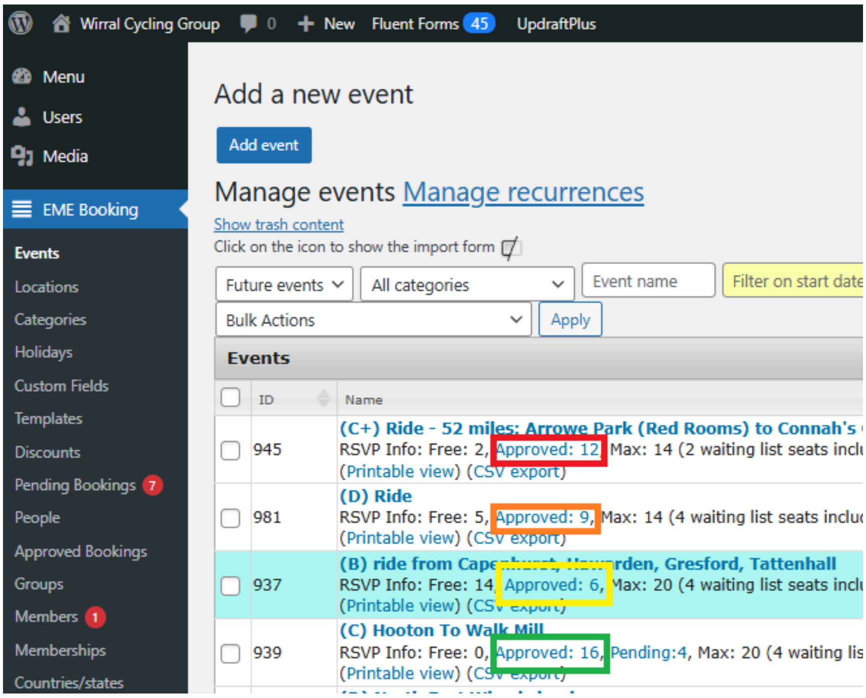
3. Delete a Booking

People can cancel their own bookings by clicking on the link embedded in the confirmation email that they receive, but ride leaders and system administrators can also cancel a person’s booking if required.

To cancel a booking go to EME Booking on the dashboard then click on “Approved” for the ride with the booking you want to cancel.



Then put a cross in the box next to the booking that you wish to delete, select ‘Delete booking (move to trash)’ and press the “Apply” button. The booking will be deleted and emails will be sent to the ride leader and the person who made the booking informing them that the booking has been deleted.