

Blue Sombbrero: Upward ULM

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Set up Your Program as an Upward Program

It is extremely IMPORTANT to set up your Programs as Upward Programs to insure that your information will import properly into ULM!

How to Make Your Program an Upward Program

1. Go to Admin>>Programs>>Edit Programs
2. Roll Over the Pencil Icon Next to Programs Module Title and choose Add New Program
3. Choose Camp as Program Type
4. Give the Program a Name
5. Make sure the check box is checked for Is Upward Program?

Program Type:	<input type="text" value="Camp"/>
Program Name:	<input type="text" value="2008 Upward Basketball"/>
Is Upward Program?	<input checked="" type="checkbox"/> Yes

6. Click Create

Customize your Registration Questions for Upward ULM Export

IMPORTANT- There is an Upward Info section that is down at the bottom of the page that contains all of the ULM related fields that you need to use insure that your information will export properly.

Upward Information

Primary Contact Relationship

What is [Account First Name] [Account Last Name]'s relationship with the participant? Display Required

Secondary Contact Relationship

What is [Secondary Contact First Name] [Secondary Contact Last Name]'s relationship with the participant? Display Required

Years Experience? Display Required

Grade (Current Year)? K3 Display Required

Jersey Size? Youth S Display Required

Shorts Size? Youth S Display Required

Cheer Tee Size? Youth S Display Required

Skorts Size? Youth S Display Required

Cheer Turtleneck Size? Youth S Display Required

Height (in inches)? Display Required

If applicable, select ONE night your child CANNOT practice? Monday Display Required

Carpool Link (only same age/grade and gender, other player must also list your child as their carpool link): Display Required

Terms and Conditions:

your agreement with all statements made in such sections.
 AUTHORIZATION AND RELEASE OF LIABILITY

 Unlimited athletic program (the "Program") of the above-named Church. My child will participate in the Upward sport denoted. I understand that this Program is a nonprofit Christian sports ministry program for youth and that my child's participation is voluntary and not essential to completion of requirements

Accept Yes Display Required

Player Information Notes (if any) Display Required

Emergency Contact First Name Display Required

Emergency Contact Last Name Display Required

Emergency Contact Daytime Phone Display Required

Emergency Contact Evening Phone Display Required

Player or Cheerleader? Player Cheerleader Display Required

Church (If you regularly attend church, which one?) Display Required

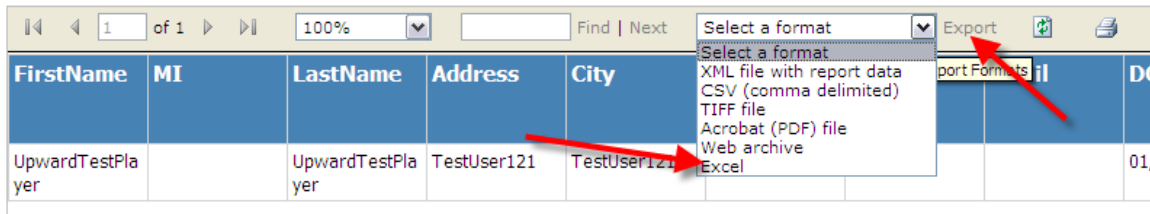
1. Scroll down to the Upward Info section and Display or Require the fields that you wish to collect during registration. ALL of these fields in this section will export into your ULM!!

2. In the Volunteer Information select any Volunteer Roles that you want associated with this Program. Any Volunteer Role with the word “Coach” in it will be included in the Coaches ULM export.
3. Click Update at the bottom of the screen

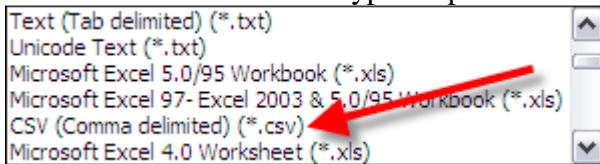
Export Registrations for Upward ULM

IMPORTANT- You should only export one program at a time. The export feature will generate a report that can be saved and then imported into ULM.

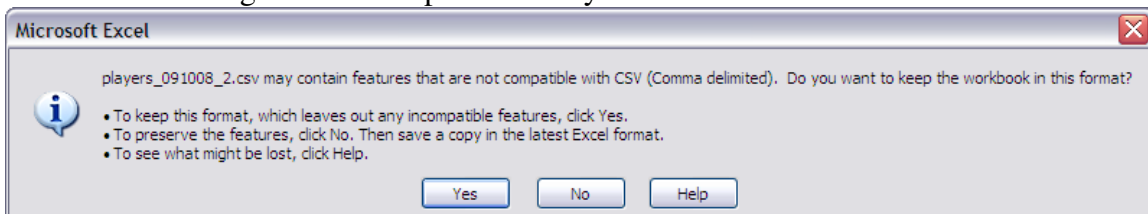
1. Go to Admin>>Reports>>Upward ULM Reports
2. Select the Program you wish to generate an export file.
 - a. To export Players click the Players Report button
 - b. To export Coaches click the Coaches Report (any volunteer role that contains the word “Coach” in the Volunteer Role Name will be included in this export)
 - c. To export Volunteers (any volunteer role that does NOT have “Coach” in the Volunteer Role Name) click the Volunteers Report. ****This Feature is NOT available at the current time.****
3. The Report will open in a new window.
4. From the Select Format drop down menu choose Excel and click Export



5. Save the file to your computer.
6. Open the file and choose File>>Save As
7. In the Save as Type drop down choose CSV

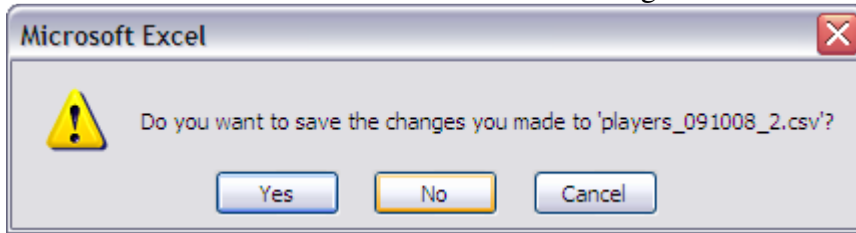


8. Click Save
9. A dialogue box will open and ask you



10. Answer Yes

11. Close and answer No to the next Dialogue box



12. Your file is ready for importing to ULM!!!

Known Issues with ULM Coaches Report and ULM Volunteers Report

ULM Coaches Report Summary:

The “ULM Coaches Report” will include anyone who has signed up as a volunteer role including the word, “coach,” in the name. So Head Coach, Assistant Coach, etc, will be included on this report.

Included Fields:

1. FirstName
2. MI
3. LastName
4. Address
5. City
6. State
7. Zip
8. DOB
9. Gender
10. HomePhone
11. WorkPhone
12. GendertoCoach
13. PreferredPracticeTime- This field is not applicable in ULM currently
14. ChurchName- This is defaulted as the Church Partner Name and is NOT populating the answer to the question “What church do you attend?”

Fields that are NOT being exported currently:

1. Email
2. FaxPhone
3. GradetoCoach
4. GolfShirtSize
5. PreferredMonday- Defaults to FALSE in report regardless of answer given
6. PreferredTuesday- Defaults to FALSE in report regardless of answer given
7. PreferredWednesday- Defaults to FALSE in report regardless of answer given
8. PreferredThursday- Defaults to FALSE in report regardless of answer given
9. PreferredFriday- Defaults to FALSE in report regardless of answer given

- 10. Notes
- 11. Extension

ULM Volunteers Report Summary

The ULM Volunteers Report will include anyone who has signed up as a volunteer role NOT including the word, “coach,” in the name.

Included Fields:

- 1. FirstName
- 2. MI
- 3. LastName
- 4. Address
- 5. City
- 6. State
- 7. Zip
- 8. HomePhone
- 9. WorkPhone
- 10. ChurchName- This is defaulted as the Church Partner Name and is NOT populating the answer to the question “What church do you attend?”

Fields that are NOT being exported currently:

- 1. Referee
- 2. PrayerPartner
- 3. Devotional Leader
- 4. TeamParent
- 5. Commissioner
- 6. Notes
- 7. Email

We are aware of the need for the additional fields listed above to be included in the Coaches and Volunteers report and will release an updated version of these reports in the future to include these fields.

In the interim, there are two ways to include this information:

- 1. You can run a report in your Report Wizard for Coaches and Volunteers and include Email Address as one of the attributes on the report. You could then copy and paste those email addresses into the “ULM Coaches Report” or “ULM Volunteers Report” once you have exported it to excel. This would allow you to include Email Address in your Import.
- 2. You could go ahead and import the “ULM Coaches Report” and “ULM Volunteers Report” to ULM and then add their email addresses directly to the ULM system.

How to get Support from Blue Sombrero

We are here to help! As a Blue Sombrero Admin Licensee, you have access to our [Blue Sombrero Support Site](http://support.bluesombrero.com) (<http://support.bluesombrero.com>)

Search for solutions or log a case and we'll get back to you with an answer!