

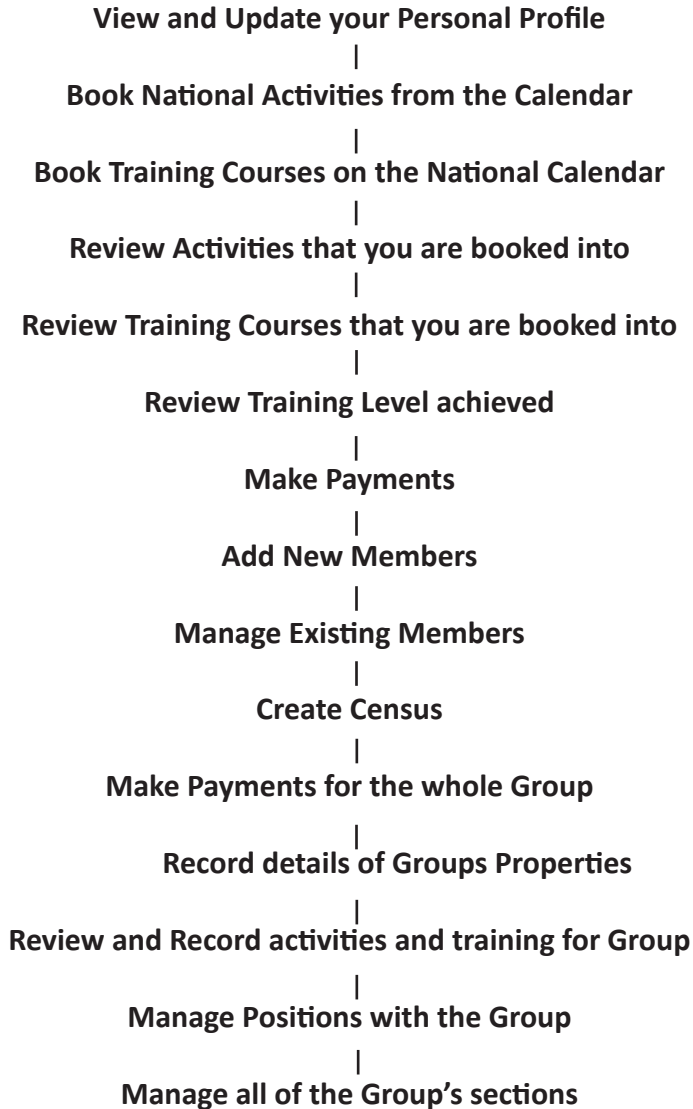
Membership Management System -

Group Leader Handbook



Group Leader Overview

Group Leaders Can:-



Date: October 2017

Version 1.1

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As Group Leader you will have additional features to most other members to ensure that you can fulfil the duties of your role and help manage the data and membership of your Group. The additional features will be accessible on the left below the existing navigation elements, see below.

MANAGING MEMBER PROFILES

The first feature is [Manage Profiles](#) , if you click on this area you should see the screen below.

Manage Profiles

+CREATE PROFILE Please click the Create Profile button to create a new member or transfer a member between the different adult roles

Search members

FILTER RESULTS **CLEAR ALL FILTERS**

- Alan Sier [View](#) [Edit](#) [More...](#)
- Eaphen George [View](#) [Edit](#) [More...](#)
- Jacob Gregory [View](#) [Edit](#) [More...](#)
- Mary Jones [View](#) [Edit](#) [More...](#)
- Ben Naren [View](#) [Edit](#) [More...](#)
- FAH FAZ [View](#) [Edit](#) [More...](#)
- Legy Jacob [View](#) [Edit](#) [More...](#)
- Neil Mahony [View](#) [Edit](#) [More...](#)

There are a number of things you can do from this page. The first is

Adding New Members

By clicking on the **+CREATE PROFILE** button you will be able to create a new adult or youth member for your Group and you will be able to transfer an adult between different roles. When you click on this button you will be presented with the page below.

Manage Profiles > Create Profile

What kind of profile do you wish to create today ?

<p>Youth Member</p> <p>Use this form to create a profile for new Youth members aged 6 to 18</p> <p>SELECT</p>	<p>Adult Rover Scout (18+)</p> <p>Use this form for new Adult members aged 18 to 26 registering as Rover Scouts</p> <p>SELECT</p>	<p>Adult Rover Scout + Scouter</p> <p>Use this form for new Adult members aged 18 to 26 registering as Adult Rover Scout + Scouter</p> <p>SELECT</p>
<p>Adult Scouter</p> <p>Use this form for new Adult members registering as Scouters</p> <p>SELECT</p>	<p>Associate Member</p> <p>Use this form for new Adult members registering as Associate members</p> <p>SELECT</p>	<p>Transfer to new Member Type</p> <p>Use this form to transfer existing Adult members to a new member type</p> <p>SELECT</p>

This page has a number of different options. The first 5 options allow you to register a new member in a particular role. The 6th option allows you to transfer an existing adult member between different roles.

Creating a Youth Member Profile

Once you on the Select button under Youth Member you will be presented with a screen which you will be required to fill in. Please note that every field with an asterix * will need to be filled in before you can proceed. For “Phone Number” and “Email Address” you can provide a parent/guardians details instead. This information can be duplicated in “Emergency Contact Number” and under the details for “Next of Kin Phone Number” and “Next of Kin Email Address”

Once all of the details are entered click **NEXT** button and you will be brought to the screen below where you will need to input the section that the young person will become a member of (please note that the section will need to be created before you attempt to add youth members for that section). Once you choose the section type e.g. Cub Scouts, the system will automatically choose the appropriate “member subtype”. You have the facility at this point to add comments about the individual but you will not be able to affect their Status.

1. Personal information 2. Scouting information 3. Confirmation

DUBLIN PROVINCE	001 My Fingal County
00001 AirSide	Section
Scout	Choose Member subtype

Add comment to profile:

+ ADD

Member status:

Active Inactive

NEXT

Finally you click the **NEXT** button and you will be brought to this screen

Scout profile

1. Personal information 2. Scouting information 3. Confirmation

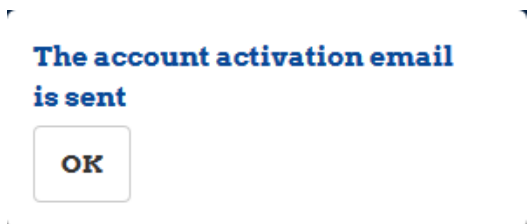
Scout profile created successfully !

[VIEW PROFILE](#) [EDIT PROFILE](#)

Test Name - Scout
DUBLIN PROVINCE - 001 My Fingal County
AirSide 00001 - Cub Scouts

MANAGE PROFILES **CREATE ANOTHER PROFILE**

From here you have a number of options. You can View or Edit the Profile you've just created, you can [CREATE ANOTHER PROFILE](#) or you can [Manage Profiles](#). Please note, in order to finalise the process you need to click on the [EDIT PROFILE](#) button and then click on the [SEND ACTIVATION ACCOUNT EMAIL](#). Once you do you will see the image below and the parent/guardian will receive the new member email (*See the Membership Management System – Handbook for details*).



Creating an Adult Member Profile

Once you on the Select button under Adult Scouter you will be presented with a screen (see below), which you will be required to fill in. The only information that you need at this stage is The new membersName, Date of Birth and Email address (*Note: Please ensure that the address is correct as the new members will need to be able to receive an email to continue the process*).

- My Profile
- My Activities
- My Training
- My Payments
- Manage Profiles
- Manage Group

1. Invitation to join

Please enter the member name or surname you want to transfer. An email invitation will be sent so they can fill in the full profile details and complete their application

Start writing the Member to transfer

Adult

Choose Member subtype

Add comment to profile:

[+ ADD](#)

Member status:

Active
 Inactive
 Pending

[SEND INVITATION](#)

2. Personal Information (User)
3. Application Approval

All of the other fields are prepopulated based on the Group you are the Group Leader of. Once all of the relevant fields are filled in you click on the **SEND ACTIVATION ACCOUNT EMAIL** button and the new adult member will receive the new member email (See the *Membership Management System – Handbook for details*).

Transfer to new member type

Finally when you want to transfer your existing Adult members to a new member type you click on the Select button in the relevant box and you will be presented with a screen similar to the one for creating an adult member profile (see page 6).

From here you need to select a member of your group using the search box and once you have selected the member that you want to change you will be presented with a summary of their personal details so that you can ensure they are the correct person and you will need to choose what member type you wish to change them to from the drop down list (see below)

Date of birth: 11/10/1999	Email address: george.mathews@ptools.com
Province: DUBLIN PROVINCE	County: 001 My Fingal Coutry
Group: 00001 AirSide	

Adult	Scouter
Add comment to profile : <input type="text"/>	Choose Member subtype Associate Rover Scouter Scouter + Rover

Member status :
 Active Inactive Pending

SEND INVITATION

2. Personal Information (User)

3. Application Approval

Once you've chosen the new member type that this adult member is taking on just click the **SEND INVITATION** button.

Managing Existing Members

The second thing that you can do is manage your existing members. You will have access to view all of the members of your Group and the Search Members field will allow you to pinpoint a specific member regardless of how many you have.

You have other options however, you can filter the results, which will allow you to pick out a specific type of member from your Group. You can filter your members by:

- *Member Type*
- *Section*
- *Position*
- *or Status*

Once you've filtered your members down or chosen the member you specifically want to see you have a number of options you can

View

See the full profile of the member in question, including the same level of information that you can view for yourself under your own "My Profile" button.

Edit

This will allow you to edit the personal information of the members in your Group (excluding their name, date of birth or gender). Please note if you need these fields changed you need to contact National Office.

More

This option has a number of features that allow you to make changes where the member is concerned, including; Assigning them to training, Assigning them as Section Leader, Changing the Position they hold in the Group and Deactivating their membership of your Group.

MANAGING GROUP


The **Manage Group** button will allow you manage all other aspects of the Groups records in one area.

Manage Group

- My Profile
- My Activities
- My Training
- My Payments
- Manage Profiles
- Manage Group**

You are managing: 00001 AirSide

Group Profile | Census | Payments | Properties | Events | Positions



00001 AirSide
244 Parklands
Northwood
Santry
Dublin
Phone: 0123456 | Email: george.mathews@ptools.com

Sections types



Beavers Scouts
[View Sections](#)



Cub Scouts
[View Sections](#)



Rover Scouts
[View Sections](#)



Scouts
[View Sections](#)



Venture Scouts
[View Sections](#)

Search members

Group Members

FILTER RESULTS ▼

[Clear all filters](#)



Alan Sier
[View](#) | [Edit](#) | [More...](#)



Ben Naren
[View](#) | [Edit](#) | [More...](#)



Eaphen George
[View](#) | [Edit](#) | [More...](#)



FAH FAZ
[View](#) | [Edit](#) | [More...](#)



Jacob Gregory
[View](#) | [Edit](#) | [More...](#)



Legy Jacob
[View](#) | [Edit](#) | [More...](#)



Mary Jones
[View](#) | [Edit](#) | [More...](#)



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Areas that can be managed, include:

Census

Creating a new census and reviewing existing census

When creating a census you simply click on the “create census(PIC)” button and when the Log Entry appears click on the “see details(PIC)” button in the bottom right. You will be brought to a screen that looks similar to this

2017 Statement

Currency:

Euro €

 [Print statement](#)

	Male		Female		Fee		Subtotal
Scouter	0	+	0	x	32.5	=	€0
Scouter + Rover	0	+	0	x	32.5	=	€0
Associate	0	+	0	x	32.5	=	€0
Youth Member 18+	0	+	0	x	32.5	=	€0
Transferring to Adult Membership	0	+	0	x	32.5	=	€0
Pending Members	0	+	0	x	0	=	€0
Honorary Members	0	+	0	x	0	=	€0
Beaver Scouts	0	+	0	x	45	=	€0
Cub Scouts	0	+	0	x	45	=	€0
Scouts	0	+	0	x	45	=	€0
Venture Scouts	0	+	0	x	45	=	€0

Over 18 Fees	€0
Under 18 Fees	€0
Arrears	€0
Scout Group Directors & Officers Insurance	€0
Fees Due	€0
Amount Paid	€0
Balance	€0

UPDATE

SAVE

From this screen you can review that the correct number or members of various types have been recorded and if you are happy with it you just click Submit. If however you aren't happy with it you can click Save and then go back to “Manage Group” and update the relevant sections to reflect the correct numbers. Once you're satisfied that all is in order go back into the Census tab and See Details again and click the update button.

The changes you've made should appear and if you're happy that all is in order you simply click "submit(PIC)". You can also print a statement for your own records.

Payments

Reviewing and paying outstanding payments due for events, census etc. and Looking back over your payment history as well as viewing and printing receipts for same.

Making Payments

You can make payment for individual Activities/CourseS by selecting the relevant item and clicking "Pay Now" or alternatively you can pay all outstanding payments in one go by selecting all of the listing Activities/Course and clicking "Pay Selected". Once you click this button you will see a screen similar to the one below

Payment Info

Payment Method

How would you like to pay?

ONLINE PAYMENT

Item	Unit price	Quantity	Subtotal
National Activity Clean City	€100.00	1	€100.00
Training Continued scouter training	€100.00	3	€300.00
National Activity Clean City	€200.00	1	€200.00

Total

€600.00

CANCEL

PAY NOW

This screen will display the total owing and what makes up this payment and if you are happy with this you then click the "pay now" button, which will bring up this box prompting you that you will be redirected to a payment page to complete the payment.

Payment Confirmation

Press submit to be redirected to the Scouting Ireland payment page to complete your payment

Amount due: €60


CANCEL

SUBMIT PAYMENT

Once you click on the "submit payment" button here you will be directed to a page directed to a page containing the details overleaf, where you will need to enter your credit/debit card details and finally hit the "submit payment(PIC)" button to finalise the payment.

Payment Details

Card Number




Expiry


Security Code

?

Cardholder Name

+ **SUBMIT PAYMENT**

 256-bit SSL encrypted

Securely processed by 

Properties

Adding / Reviewing details of any property the Group might hold or use.
 Creating a list of any equipment of note that the Group might have and finally
 creating an Asset Register to keep important records pertaining to same.

You are managing:

00001 AirSide

- Group Profile
- Census
- Payments
- Properties**
- Events
- Positions

Buildings & Land

+ADD BUILDING/LAND

No building & land

Equipment

+ADD EQUIPMENT

No equipment

Asset Register

+ADD ASSET

No asset

Events

This will allow you to review any Activities and National Training Courses that your Group has been booked into recently as well as look back over previous year Activities and Courses. You are also able to create an online record of you Setion/Group Camps in this area, if you wish.

Positions

You can use this area to review and edit the list of people that hold Appointments & Positions within your Group as well as Granting New Positions (Please note: You cannot Grant a Position to anyone before they have been added to your Group)

Manage Group > Positions

The screenshot shows the 'Manage Group > Positions' interface. On the left is a navigation menu with options: 'My Profile', 'My Activities', 'My Training', 'My Payments', 'Manage Profiles', and 'Manage Group'. The main content area features a header 'You are managing:' followed by a dropdown menu displaying '00001 AirSide'. Below this is a row of tabs: 'Group Profile', 'Census', 'Payments', 'Properties', 'Events', and 'Positions'. A 'GRANT POSITION' button is located to the right of the tabs. Under the 'Positions' tab, a member profile for 'Mary Jones' is displayed with the role 'GROUP LEADER' and an 'EDIT' button.

Finally the Manage Group also includes a profile for each of your Programme sections as well as the ability to create new ones and is another way to review and manage the profiles of your Group's members.

Managing Sections

As Group Leader, you will have access to create and manage all of the various programme sections and the youth and adult members within each section. If you click on the View Section option under any of the Programme Section badges that are on the main Manage Group page (see image on page 9) you will be shown all of the sections that your Group has of that type, you will also be prompted with the option to "create section". The image overleaf for example would be what you would see if you had 1 Beaver section and chose that option.

Sections types



Beavers
Scouts

[View
Sections](#)



Cub Scouts

[View
Sections](#)



Rover
Scouts

[View
Sections](#)



Scouts

[View
Sections](#)



Venture
Scouts

[View
Sections](#)

Sections Beavers Scouts

[+ CREATE SECTION](#)



Airside
beaver
sections

[View](#) | [Edit](#) |
[Delete](#)

From this screen you will have the option to view the details of the section and it's members, to edit the information related to the section (including the member in charge) and to delete the section completely.



**SCOUTING
IRELAND** 

**ADVENTURES
BEGIN HERE**