

# Operoo Group Leaders Handbook

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## What does this cover

The tasks a Group Leader can do in Operoo to administer their Group activities.

## Background Information

As a Group Leader, you are set up in Operoo as an Administrator.

This gives you elevated permissions to manage your group via an Admin portal with oversight on all activities in your Group.

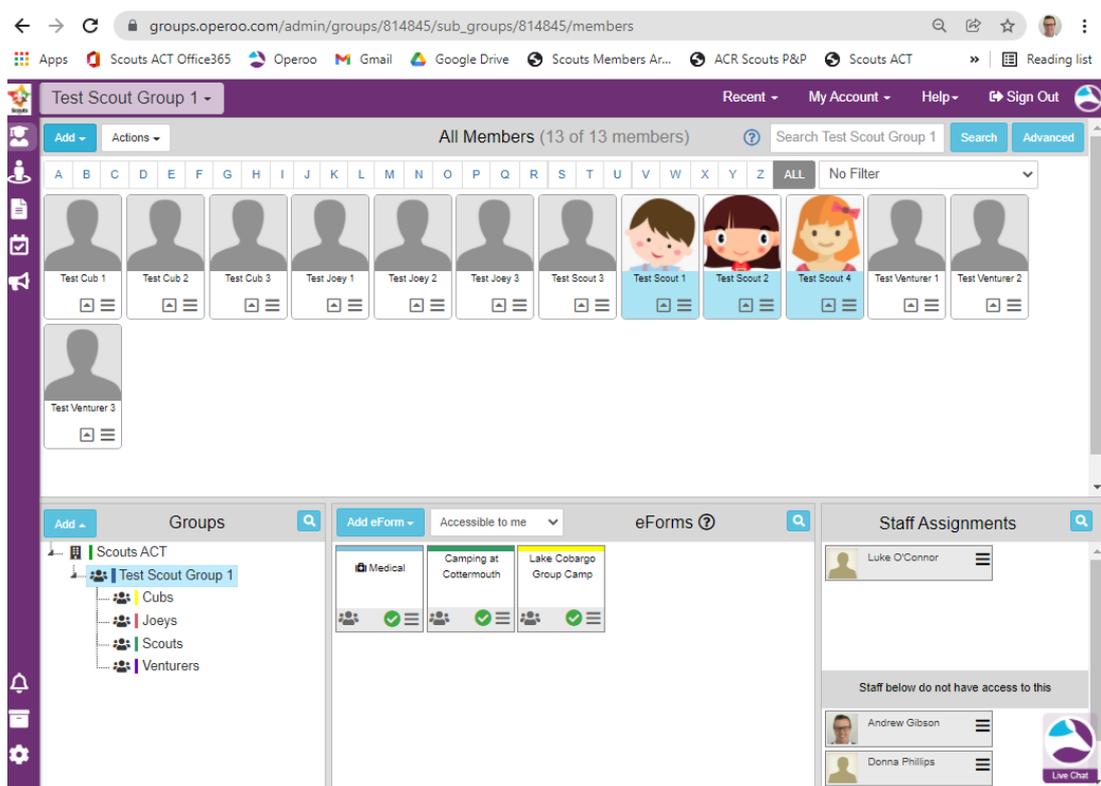
## Operoo Menu Navigation

On the left side of screen, you have a navigation pane offering different functionality for you to manage your Group in Operoo. This functionality includes:



### Members Section

This is the default landing page when you login to Operoo. It lists all of the youth and adult members in your Group. You do not need to update any details in here as the information comes from Extranet (so it's important that Extranet is kept up to date). If you have for instance a youth member moving up from Cubs to Scouts, once updated in Extranet, this change will reflect in Operoo overnight.



The screenshot displays the Operoo web interface for the 'Test Scout Group 1' members section. The browser address bar shows the URL: `groups.operoo.com/admin/groups/814845/sub_groups/814845/members`. The page title is 'Test Scout Group 1'. The main content area shows 'All Members (13 of 13 members)' with a search bar and an 'Advanced' search option. Below this is a grid of member cards, each with a profile picture and a name: 'Test Cub 1' through 'Test Cub 3', 'Test Joey 1' through 'Test Joey 3', 'Test Scout 1' through 'Test Scout 4', and 'Test Venturer 1' through 'Test Venturer 3'. The 'Test Scout' cards have a blue background and a cartoon character icon. A vertical navigation pane on the left contains icons for home, members, groups, and settings. At the bottom, there are three panels: 'Groups' showing a tree view with 'Scouts ACT' and 'Test Scout Group 1' (containing 'Cubs', 'Joeys', 'Scouts', and 'Venturers'); 'eForms' showing a table of forms with columns for 'Add eForm', 'Accessible to me', and 'eForms', with rows for 'Medical', 'Camping at Cottermouth', and 'Lake Cobargo Group Camp'; and 'Staff Assignments' showing a list of staff members: 'Luke O'Connor', 'Andrew Gibson', and 'Donna Phillips', with a 'Live Chat' button at the bottom right.

In the Members Section there are four panes of information:

## 1. All Members

This lists the members in your group which are colour coded. The different colours mean:

White – A profile has not yet been created.

Gold – a profile has been created but this has not yet been shared with Scouts ACT. You may need to reach out to that family/leader and provide instructions on how they can do this (see separate instructions on how to create your Operoo profile).

Red – the email address is incorrect. You will need to correct this in Operoo by going into the profile and selecting Edit member → change the email address (and then update this in Extranet as well).

Blue – the profile has been created and shared with Operoo, which is what we want all of our members to be so they can respond to Activity Consent forms.

Clicking on the menu icon of a member allows you to view the profile which includes parent and emergency contact details and medical information.



Details for Test Scout 4

Member Profile	 <div style="text-align: right;"> <p><b>Test Scout 4</b></p> <p>17 July 2010 (11 years old)</p> <p>Profile ID: <a href="#">(Edit)</a></p> </div>
All eForm Responses	<p>Profile last updated: <b>12 January 2022 11:45:39</b> by <b>Andrew Gibson</b></p>
Student Logs	<p>Profile Owner Contacts: <b>andrewgibson7307@gmail.com</b> 041234567 ( English )</p>
Audit Trail	<p>Learning Difficulty: <b>Risk level: Low, Medication Not required</b></p>
Injury Reports	<p>Integration ID: <b>Not Set</b> This member will be automatically archived: <b>Never edit</b></p>
Private Notes	<div style="border: 1px solid #ccc; padding: 5px; background-color: #f0f0f0;"> <p><b>Tags ( 0 )</b></p> </div>
Edit Groups and eForms	<p><a href="#">Show Groups and eForms</a></p>
Upload Action Plan	
Edit Member	
Archive this Member	
Recent Profile Changes	
Viewed Profiles	
Mobile App Signins	
View Profile at -	

**User Account Details**



**Andrew Gibson**  
Father ( English )  
041234567

[andrewgibson7307@gmail.com](mailto:andrewgibson7307@gmail.com)

[Send SMS Message](#)

[Send Email Message](#)

Further points to note on this screen include:

### Member profiles

Clicking on this shows the full profile information including emergency contacts, medical contacts (if supplied), emergency information, medical conditions, and any safety alerts.

Test Scout Group 1 - Recent - My Account - Help - Sign Out

Test Scout 4 [Back](#) [Print](#)

### Personal Details for TEST SCOUT 4



Gender: Female  
 Date of Birth: 17 July 2010 - 11 year old  
 Address: 30 Test Street, Testville, Australian Capital Territory 2600, Australia [Map](#)  
 Profile ID

### Sharing

This profile is shared with you because you are an authorised carer of Test Scout Group 1.

### Emergency Contacts

Relationship	Name	Email	Home phone	Work phone	Mobile phone
Father	Andrew Gibson	<a href="mailto:andrewgibson7307@gmail.com">andrewgibson7307@gmail.com</a>			041234567
Mother	Angela Gibson	<a href="mailto:angelagibson@gmail.com">angelagibson@gmail.com</a>			0412 456 789

### Medical Contacts

No medical contacts

Emergency Information	Medical Conditions
Do you object to transfusions	Allergies (anaphylactic)
Wears glasses	Allergies (non-anaphylactic)
Wears contact lenses	Anorexia/Eating Disorders
Medicare number	Asthma
Ambulance insurance	Blackouts/Dizziness/Fainting
Private health insurance	Bleeding Disorder
Permission to have paracetamol	Diabetes
Swimming ability	Dietary Requirements

Yes - 1234 5678 9 (3) - 30/04/27  
 No  
 No  
 Yes  
 No  
 No  
 Fair swimmer (50 - 100 metres)

Amaroo - 2022-01....xlsx | 1. Create your O....docx | [Show all](#)

## All eForm Responses

Allows you to view the history of activities the member has been invited to with their response

Test Scout Group 1 - Recent - My Account - Help - Sign Out

All eForm responses for Test Scout 4



Test Scout 4  
Female, 11 year old

[Clear Filters](#) [Bulk Actions for 0 Responses](#) [Export to CSV](#)

Show 20 entries

All	Actions	eForm Name	Categories	Status	Sent to	Type	Delivery Method	Response Date	Responded by	Amount Paid
<input type="checkbox"/>		Lake Cobargo Group Camp		Accepted by the Profile Owner	Parents	Event	Push	12 January 2022	Andrew Gibson (andrewgibson7307@gmail.com)	
<input type="checkbox"/>		Camping at Cottermouth		Accepted by the Profile Owner	Parents	Event	Push	12 January 2022	Andrew Gibson (andrewgibson7307@gmail.com)	

Showing 1 to 2 of 2 entries

Previous 1 Next

## Injury Reports

Where you can create a new or view old injury reports relating to the member

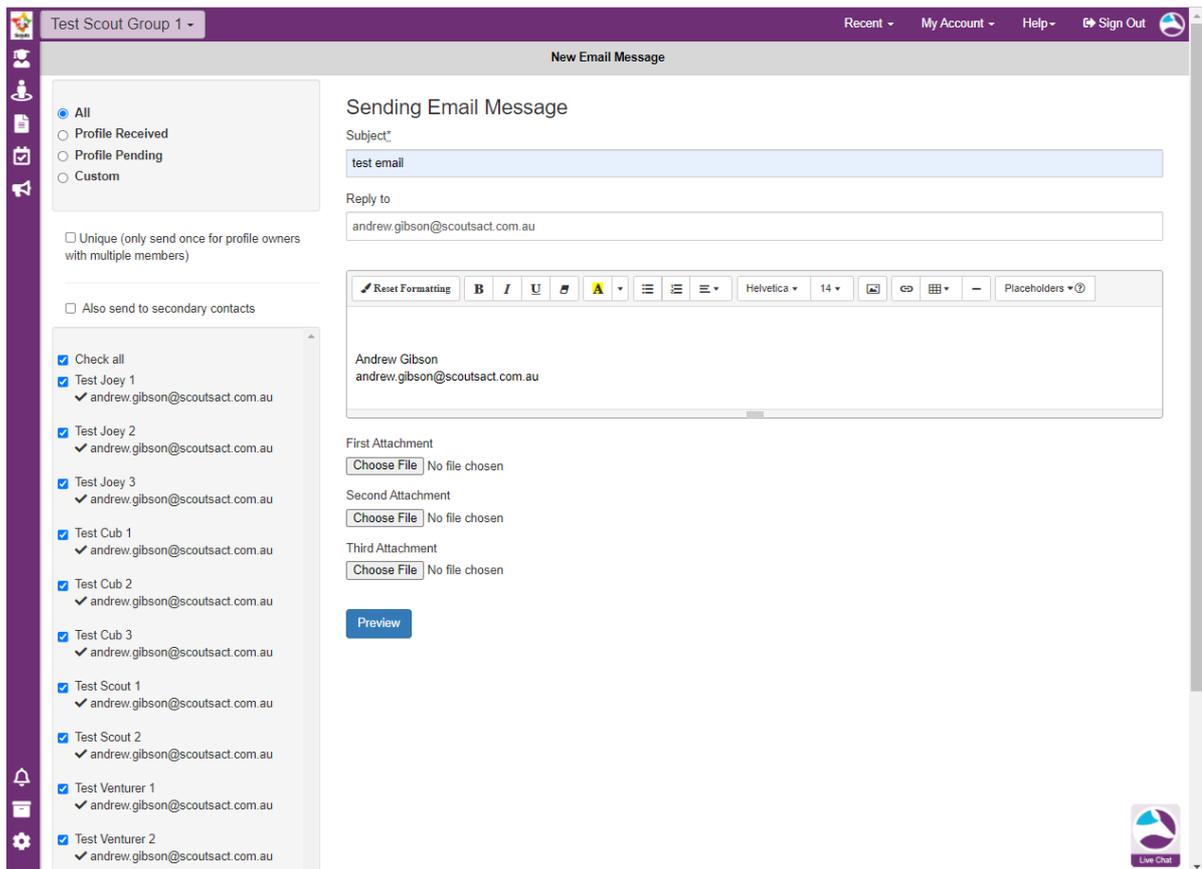


## Send email communication to members

At the top of this pane is a drop down list of Actions. Amongst these is the ability to send communications to members. To send an email to all members

Go Actions → Select All members. Then Actions → Send Email Message to Selected Members

Edit the message details and hit Preview, and then hit Send.

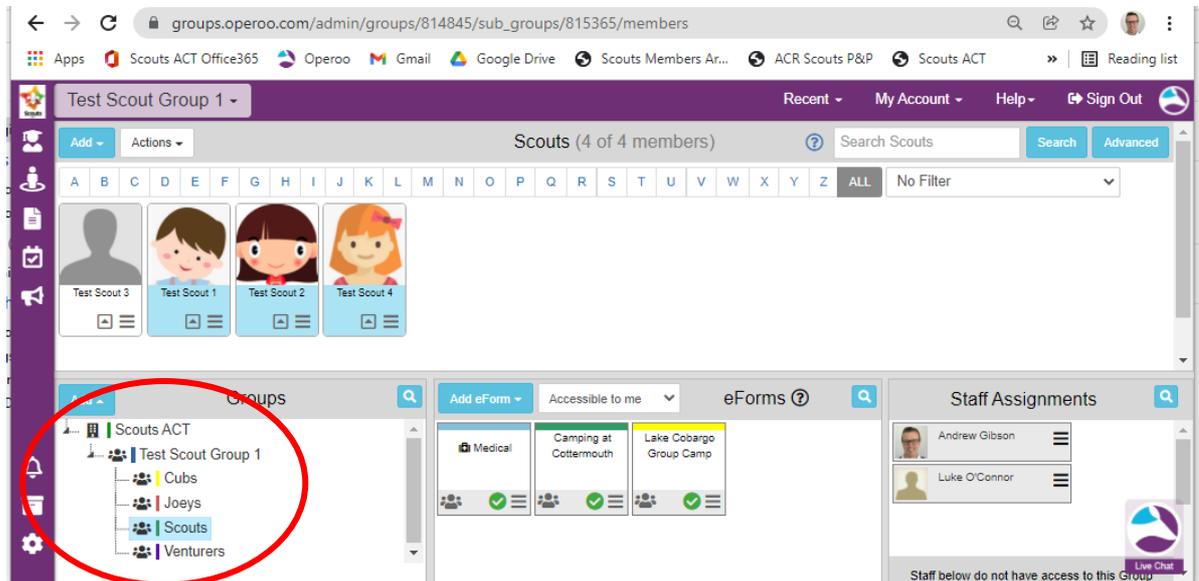


## 2. Groups

When you click on the sections within the Group, this will then filter the list of members, forms, and assigned leaders to what has been selected.

Your Group will also have an Adult section, which includes a list of all your leaders (and other adults listed in Extranet i.e. committee members). They show here so you have the ability to include them in invites for activity

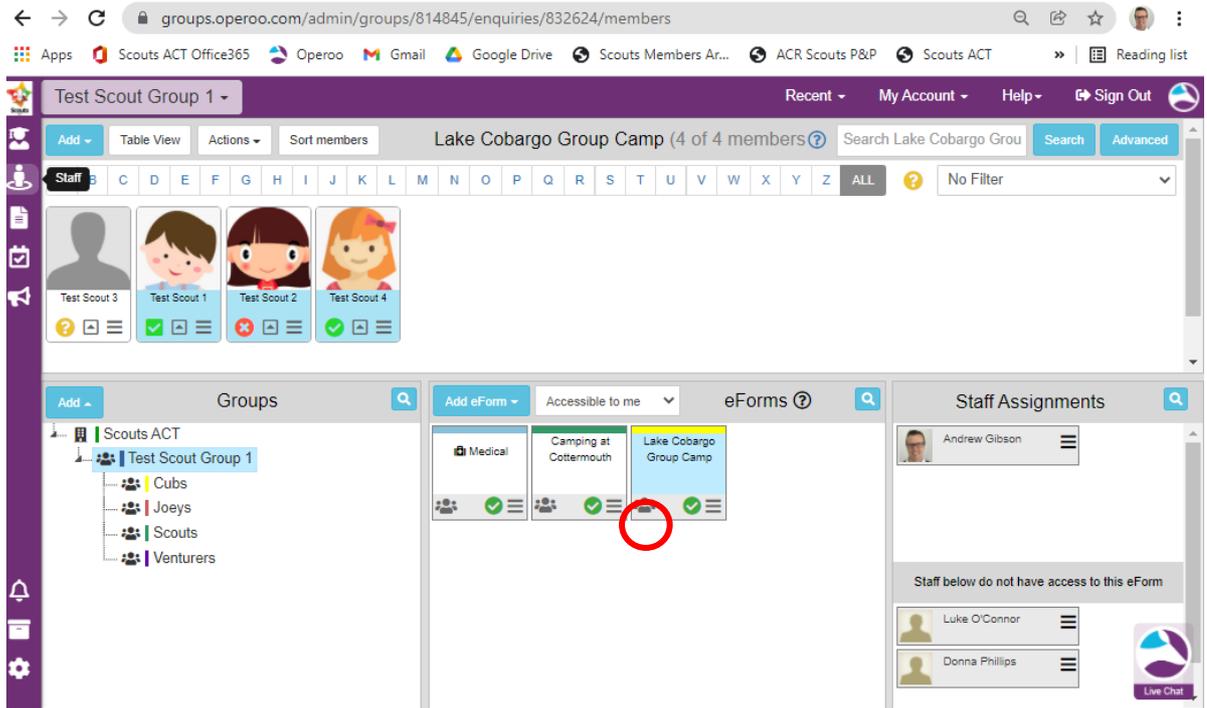
consent forms. Scouts ACT require that leaders now also respond to activity consent forms so we have an accurate record of attendance.



Youth members affiliation with different sections is linked to Extranet. So if a youth member moves up from Cubs to Scouts and this is actioned in Extranet, this will reflect in Operoo overnight.

### 3. eForms

This lists the Activity Consent forms that have been created in your group or the selected section. To view those members who have responded to an invite Click on the persons icon (bottom left of the form)



The screenshot shows the Scouts ACT web application interface. At the top, there is a navigation bar with the Scouts ACT logo and the text "Scouts ACT". Below this is a browser address bar showing the URL "groups.operoo.com/admin/groups/814845/enquiries/832624/members". The main interface is divided into several sections:

- Top Bar:** Includes "Test Scout Group 1", "Recent", "My Account", "Help", and "Sign Out".
- Staff Section:** Displays "Lake Cobargo Group Camp (4 of 4 members)". It features a search bar and a list of staff members: "Test Scout 3", "Test Scout 1", "Test Scout 2", and "Test Scout 4". Each staff member has a profile picture and a status indicator (green checkmark or red X).
- Groups Section:** A tree view showing the hierarchy: "Scouts ACT" > "Test Scout Group 1" > "Cubs", "Joeys", "Scouts", "Venturers".
- eForms Section:** Titled "Add eForm" and "Accessible to me". It lists three eForm types: "Medical", "Camping at Cottermouth", and "Lake Cobargo Group Camp". Each eForm has a status indicator (green checkmark or red X). A red circle highlights the "Lake Cobargo Group Camp" eForm.
- Staff Assignments Section:** Titled "Staff Assignments". It shows a list of staff members assigned to the eForm: "Andrew Gibson", "Luke O'Connor", and "Donna Phillips". A note below the list states "Staff below do not have access to this eForm".

#### 4. Staff Assignments

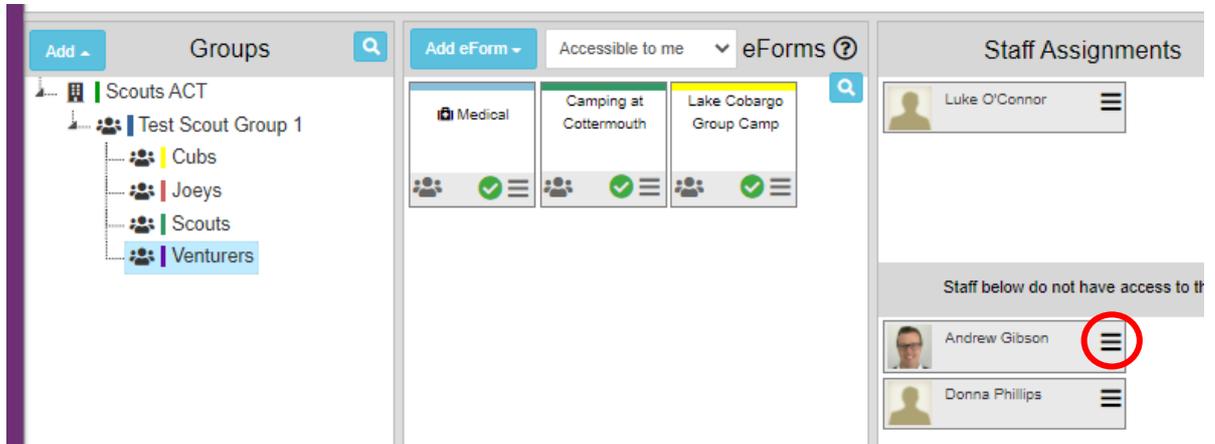
The Group Leader controls how leaders are assigned to the sections of their group, which gives them access to the profiles of those members as well as the ability to send them Activity Consent forms.

##### Assigning Leaders to a section

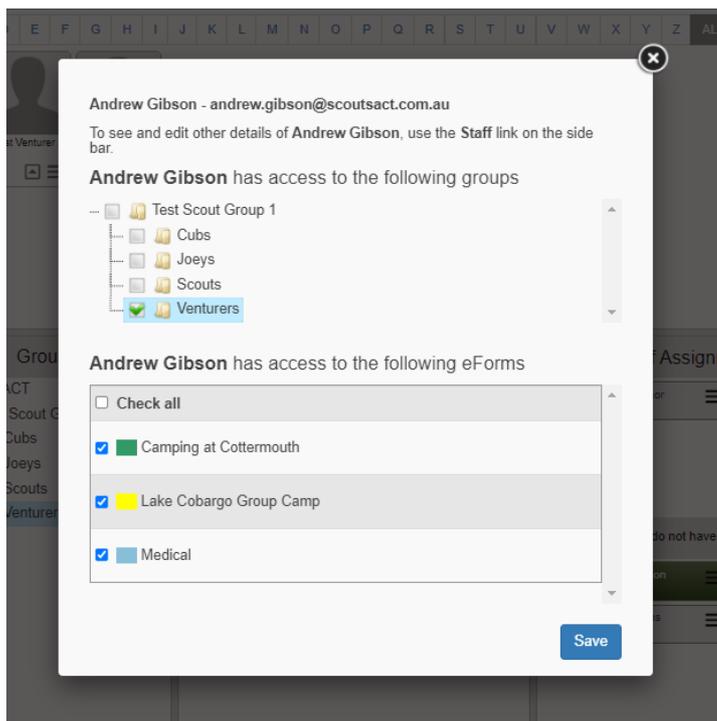
In this example we will add a leader to the Venturer section of a Test Group.

In the Groups pane of the Members Section, click on the Venturers group to see who is currently assigned.

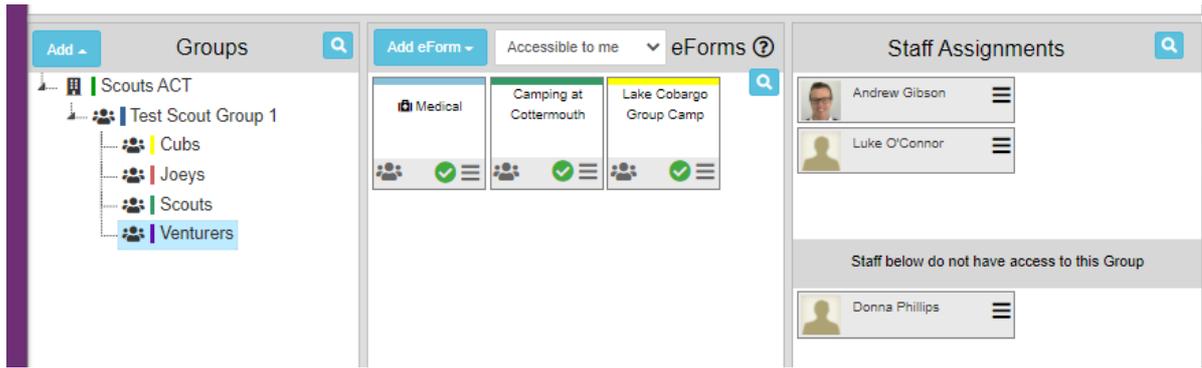
Then click on the menu (3 rows icon) to edit the relevant leader



Edit as required and hit save



The leader has now been assigned to the section. Doing this allows them to view the members profile and select them to send Activity Consent forms.



The screenshot displays a web interface for Scouts ACT. On the left, a 'Groups' sidebar shows a tree structure: Scouts ACT > Test Scout Group 1 > Cubs, Joeys, Scouts, and Venturers. The 'eForms' section in the center features three cards: 'Medical', 'Camping at Cottermouth', and 'Lake Cobargo Group Camp', each with a green checkmark and a menu icon. The 'Staff Assignments' section on the right lists Andrew Gibson and Luke O'Connor, with a note that Donna Phillips does not have access to the group.

By clicking on your sections, you are able to view the list of youth members. Bear in mind this list gets its data from Extranet, and there is a daily feed to update Operoo and create new / deactivate old youth and adult members.

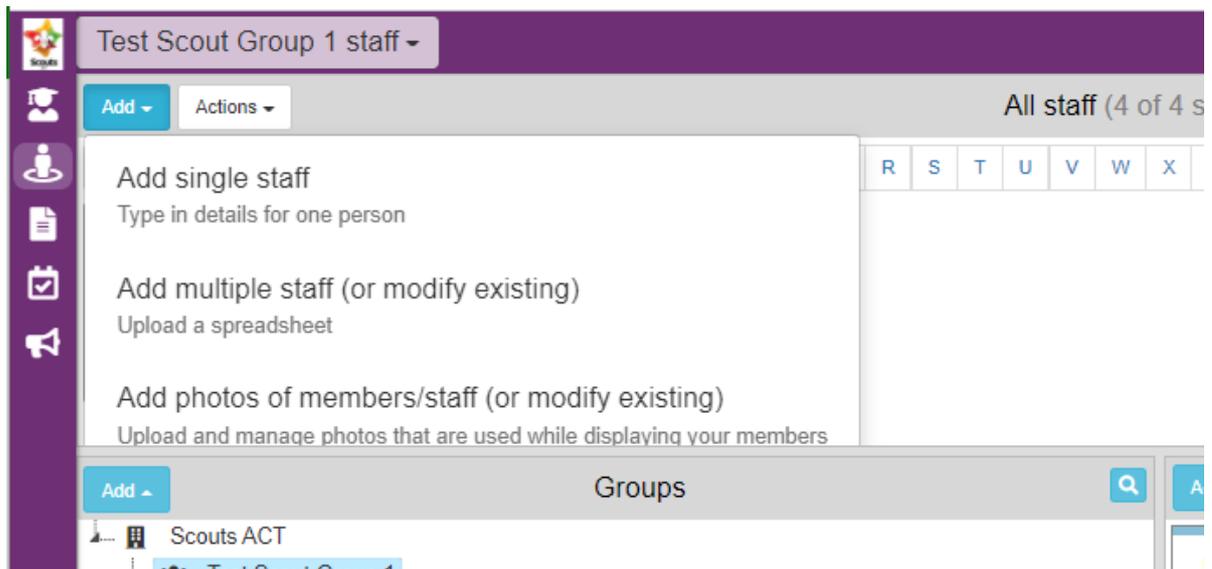
## Staff Section

The staff section is where you store your leaders. This will be setup for you during the Operoo implementation project, but past this, will be a manual process you need to do for each leader as this does NOT automatically update from the Extranet integration.

### Adding new leaders into Operoo

As new leaders join your Group over time, you will need to manually add them into the Staff section of Operoo. This allows you to assign them to a Scouting section, and gives them access to staff forms (i.e. Activity Approval forms).

To do this go to Add → ‘Add single staff’



Enter in the name and email address (make sure is the same as Extranet) then click Save. No other fields need to be filled out.

New

Name\*

ID

Auto-archive member on

Manage this profile locally (don't use Operoo for this profile)

Add this member to the following staff groups

Check all

■ Cubs

■ Joeys

■ Scouts

■ Venturers

Send Medical Reminder Emails

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Profile request details

Email address used for initial profile request\* 

Mobile Phone Number

The new leader will then appear in your list of 'staff'.



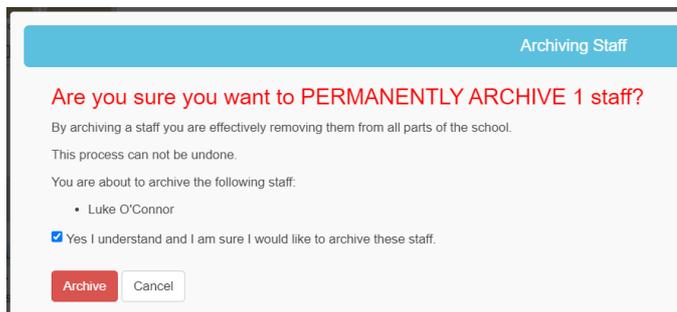
The leader is now listed in both the Staff and Member sections of Operoo (they automatically populate into the Members section from Extranet)

The Leader will get a new request in their Operoo login to share this 'new user' with Scouts ACT. As the name and email address are the same as their member account, Operoo does not ask for a new profile to be created. The Leader simply needs to hit Share to the request and it will then turn Blue as complete.

Once this is done, the next step is to assign the Leader to their section which you do in the Members Section (see notes above).

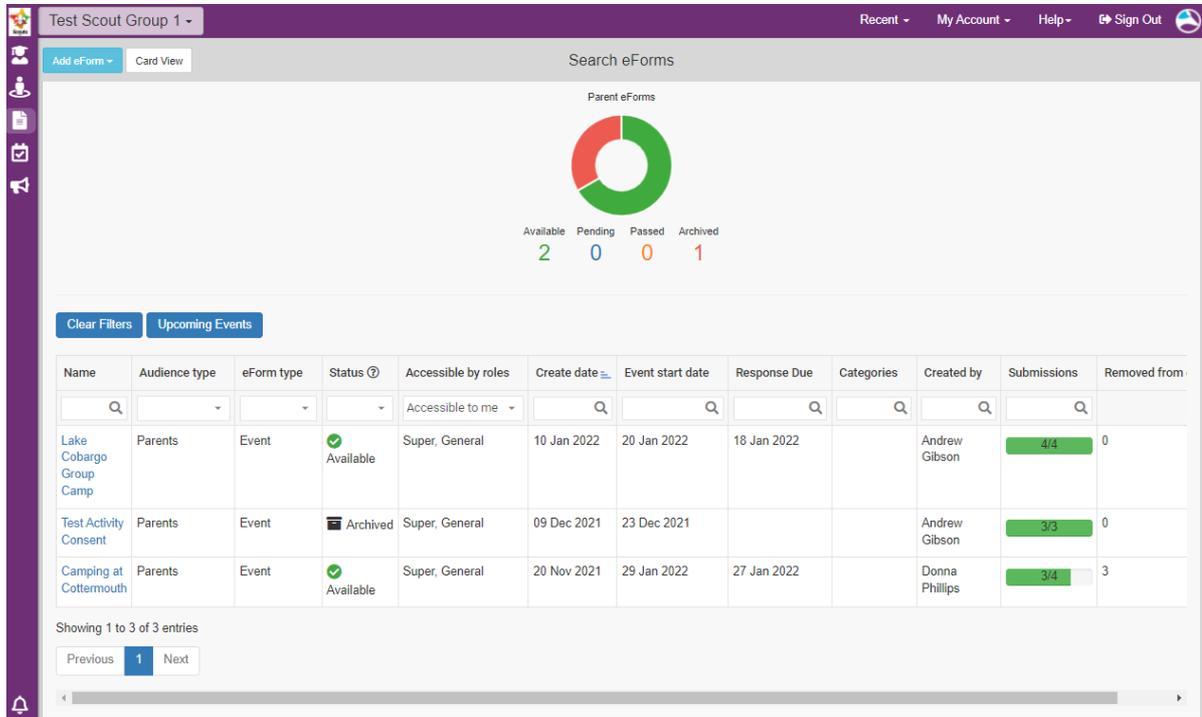
To remove a leader, click on their profile in the staff section and click on "Archive this Staff".

Once you confirm this they will be removed as a leader in your Group.



## Form Library

The form library allows you to view the history of all Activity Consent Forms in your Group.

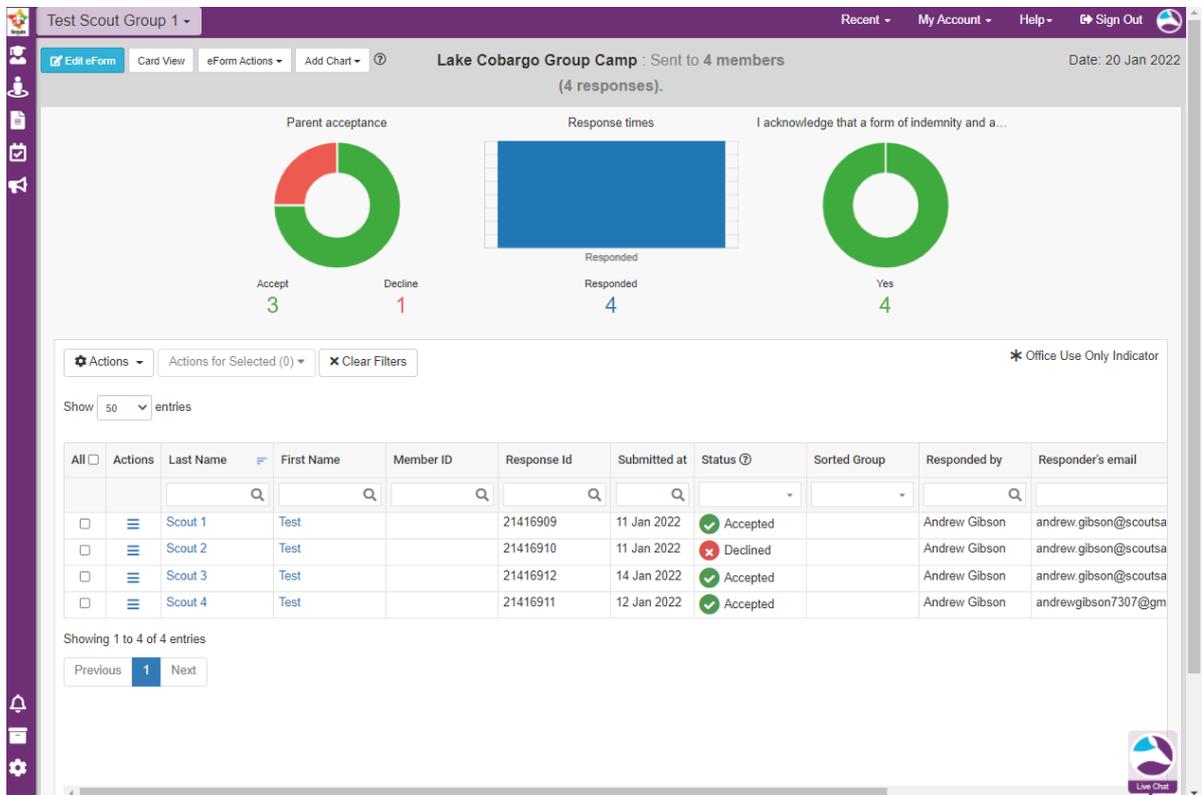


Parent eForms

Available: 2, Pending: 0, Passed: 0, Archived: 1

Name	Audience type	eForm type	Status	Accessible by roles	Create date	Event start date	Response Due	Categories	Created by	Submissions	Removed from
Lake Cobargo Group Camp	Parents	Event	Available	Super, General	10 Jan 2022	20 Jan 2022	18 Jan 2022		Andrew Gibson	4/4	0
Test Activity Consent	Parents	Event	Archived	Super, General	09 Dec 2021	23 Dec 2021			Andrew Gibson	3/3	0
Camping at Cottermouth	Parents	Event	Available	Super, General	20 Nov 2021	29 Jan 2022	27 Jan 2022		Donna Phillips	3/4	3

To view details of an Activity, click on the name link to view those youth and adult members that attended.



Lake Cobargo Group Camp : Sent to 4 members (4 responses).Date: 20 Jan 2022

Parent acceptance: 3 Accept, 1 Decline

Response times: 4 Responded

I acknowledge that a form of indemnity and a...: 4 Yes

All	Actions	Last Name	First Name	Member ID	Response ID	Submitted at	Status	Sorted Group	Responded by	Responder's email
<input type="checkbox"/>		Scout 1	Test		21416909	11 Jan 2022	Accepted		Andrew Gibson	andrew.gibson@scoutsa
<input type="checkbox"/>		Scout 2	Test		21416910	11 Jan 2022	Declined		Andrew Gibson	andrew.gibson@scoutsa
<input type="checkbox"/>		Scout 3	Test		21416912	14 Jan 2022	Accepted		Andrew Gibson	andrew.gibson@scoutsa
<input type="checkbox"/>		Scout 4	Test		21416911	12 Jan 2022	Accepted		Andrew Gibson	andrewgibson7307@gm

Over time the list of activities may grow, so you can use the search functionality to find what you need.

Test Scout Group 1 ▾

Add eForm ▾ Card View Search eForms

Parent eForms



Available 2 Pending 0 Passed 0 Archived 1

Clear Filters Upcoming Events

Name	Audience type	eForm type	Status ?	Accessible by roles	Create date	Event star
cobargo				Accessible to me		
Lake Cobargo Group Camp	Parents	Event	✓ Available	Super, General	10 Jan 2022	20 Jan 2022

Showing 1 to 1 of 1 entries

Previous 1 Next

At this stage, the remaining menu items of Event Documents and News Articles are not being used by Scouts ACT.



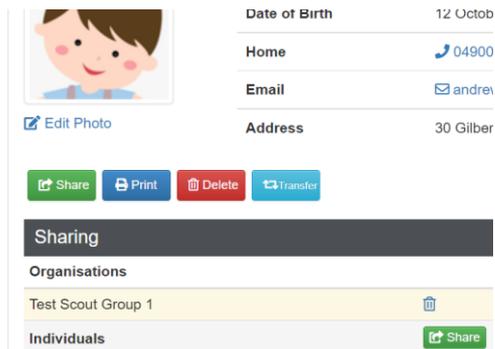
## Other information

### How do we manage joint custody or other partner access to a profile?

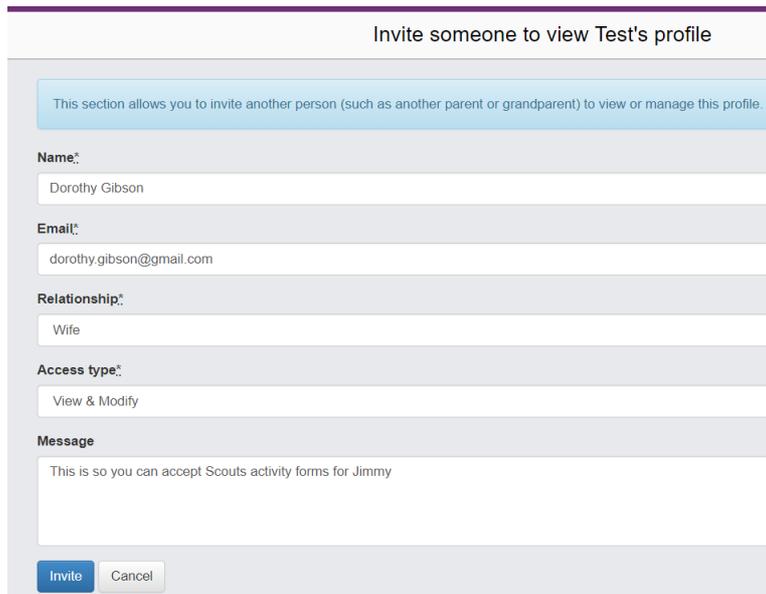
In short, the parents manage this themselves.

Just as a parent can share their child's profile with Scouts ACT, they can share this with another individual. Doing this will allow both parents to then respond to activity consent forms.

To do this **the parent** has to go into their child's profile and go to the Sharing section



Click share on the individuals' line and enter details, making sure the access is View & Modify.



### How do we manage linking members?

If you wish, you can assign your Scout leaders access to the Cubs section, and Cub leader access to the Joeyes section. This will then allow them to include linking members to be included in activity consent forms.

### How can Venturers use Operoo?

You can setup Venturers in your Group to submit activity approval forms.

In Operoo, create a generic "Venturer" as a staff member using the group venturer email account.

Create the account and profile for this. and then share the login details amongst your Venturers.

They will then have access to the forms and be able to submit activity approval forms.

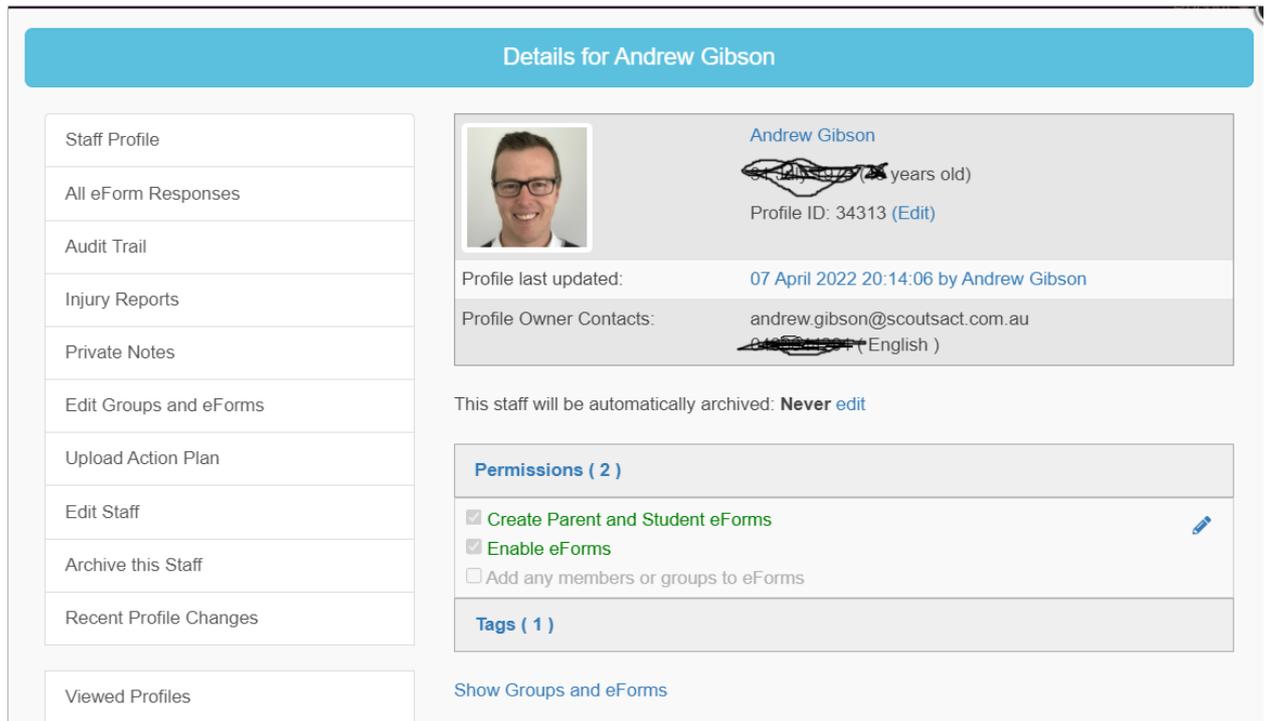
**Do not** assign this staff member to the Venturers section as that will then allow them to view the other Venturer profiles.

## What permissions can I control for my Scout Leaders?

You have the ability to set permissions at an individual level.

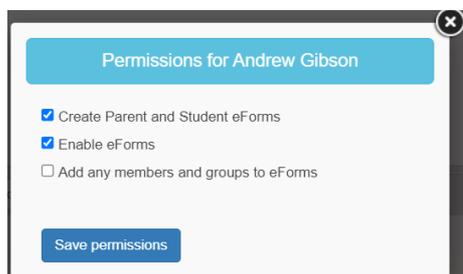
For instance you may wish to allow trainee (or all) leaders to create activity consent forms but you are the only one that can enable (send) them.

To do this, go into the staff section of Operoo and click on the leader.



Click on Permissions and then the edit icon for this.

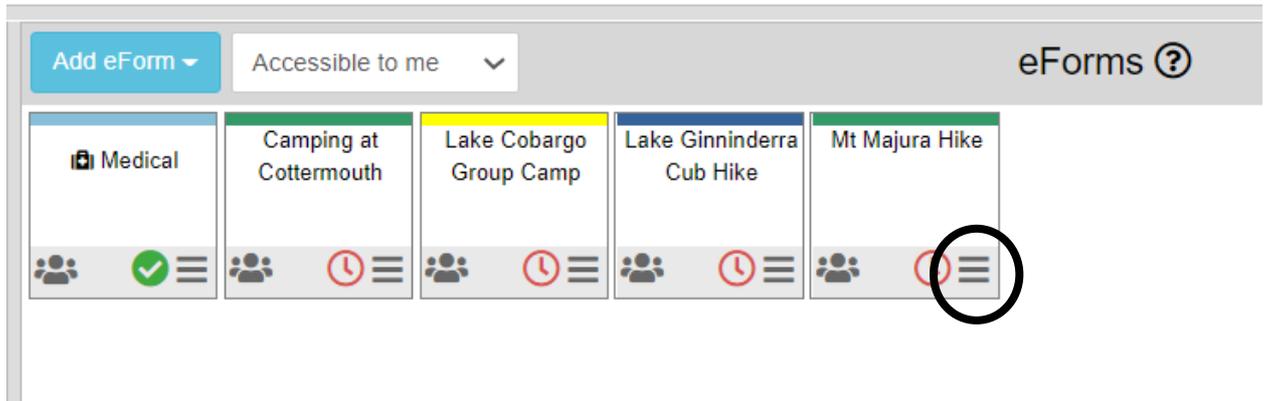
You can then change this so leaders can enable eForms (i.e send activity consent forms) or not (second option)



## How do I edit an existing activity consent form?

If the date of this or the leaders access needs to be changed etc you can do this via the Admin screen (eForms section).

Click on the menu icon for the form

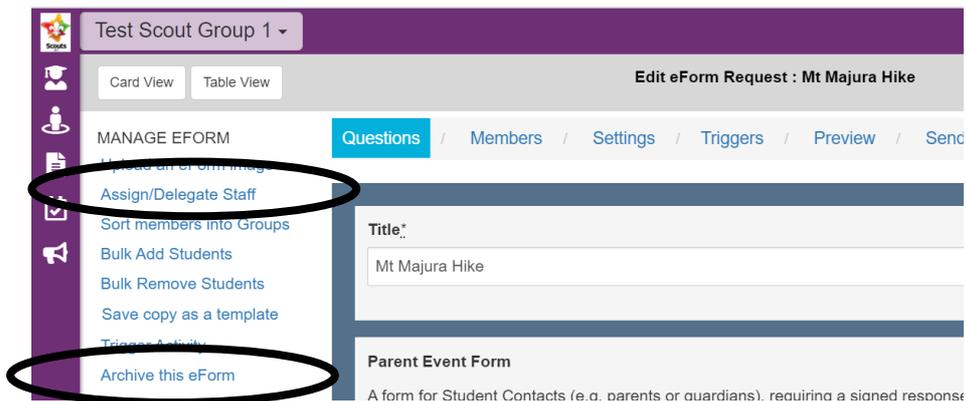


You can then go into any tab of the form to change any questions or dates.

On the left hand side menu you can also use:

Assign/Delegate Staff: to control the leaders this form is shared with.

Archive this form: to delete it.



## Venturers using their own emails addresses in Operoo

As they are under 18, Venturers cannot approve activity consent forms (even if the parent agrees). Please ensure all Venturers are linked to a parents email address who can then approve activity consent on their behalf.