

Scouts Victoria and

operoo



Scouts
VICTORIA

Session Overview

- Operoo (Intro, privacy & how it works)
- Different Views (depending on access level)
- Updating Group Details
- Staff
- Adding Staff
- Assigning Staff to Sections
- Removing Staff
- Setting up events and activities
- Where do I go for help?

NB: Above tasks all need to be completed on a desktop computer



Introduction to Operoo

Operoo is a tool for parents to share important information with Leaders:

- Health information
- Permission forms
- Any additional needs which may require adjustments such as children with learning conditions or non-neurotypical children



Operoo and privacy

- Data is stored in Australia.
- Sophisticated security measures are used.
- Information about this, along with their Privacy Policy, is available on their website.
- Operoo is subject to the provisions of the Privacy Act and the Australian Privacy Principles.
- Scouts Victoria are permitted under the Privacy Act to share information within the entity

How Operoo works

- The profile in Operoo is generated overnight from Extranet once a member is approved.
- Under 18 the profile is generated from the email provided in the primary contact field.
- If over 18 the profile generates from the members record.

Parental Detail(s):

Owyne Zobel

Relationship

Mother

How Operoo works

- Changes to the Operoo Profile -will not update records in Extranet.
- Changes to an Extranet record will only update in Operoo if:
 - A youth changes formation or group
 - A youth member leaves, the profile is removed automatically




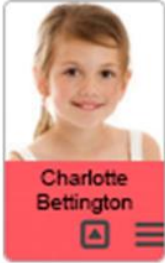

Sharing an Existing Profile

Sharing a profile will only work when

- The profile is fully completed
- The name and the email address for the profile is the exactly the same as the information in the share request from Scouts Victoria

Understanding Profile Colours

Profiles

WHITE	BLUE	YELLOW	RED	GREEN
 <p>Connor Allwood</p>	 <p>Jackson Arundale</p>	 <p>Isla Backhaus</p>	 <p>Charlotte Bettington</p>	 <p>Emily Cooper</p>
Medical profile not received	Medical profile received	Managed locally	No email address or email bounced	A selected profile

Medical Opt-Out



CareMonkey Grammar School

Add Actions All Members (25 of 25 Members)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL No Filter

Brinda Bentz Bertha Bowler Beatriz Buss Cassandra Cabrales Jorge Cabrales

Milo Moormick Mora Mosween Mama Mor Pete Finales Anna Smith (Anne)

CareMonkey Grammar School

Add Actions

A B

- Select all Members
- Deselect all Members
- Remove Selected Members from this Group
- Archive Selected Members
- Report for Selected Members
- SMS Message Selected Members
- Email Selected Members
- Add manual tags to Selected Members**
- Remove manual tags from Selected members
- Move members in hierarchy

All Members (25 of 25 Members)

M N O P Q R S T U V W X Y Z ALL No Filter

Jorge Cabrales Cathey C

Anna Smith (Anne) Bry

Sanford Swifford

Herbert Hoppin

Coolidge

Add manual tags

Tag(s)*

medical-opt-out

Use comma as a separator for multiple tags

Process

Operoo Home

You have no current requests

Responded

Greensborough Pizza and Presentation Afternoon
Requested for Nastasia ZOBEL
Responded on 13 Nov 2021

VIEW RESPONSE

COVID-19 Vaccination Status Youth
Requested for Turin ZOBEL
Responded on 01 Nov 2021

VIEW RESPONSE

COVID-19 Vaccination Status
Requested for Owyne Zobel
Responded on 15 Oct 2021

VIEW RESPONSE

View all eForm responses

My Profiles

+ Add Profile



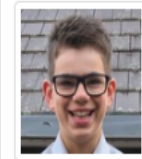
Nastasia ZOBEL
Female, 14 year old






Owyne Zobel
Female, 39 year old





Turin ZOBEL
Male, 17 year old



Profiles Shared with Me

No profiles shared from family and friends.

Groups and eForms

Operoo Central View

*** This is the view that a Section Leader or Parent will see – It is also the view for your personal information as an administrator**



Updating Group Details

To update Group details you will need to be the administrator for your Group/ Formation

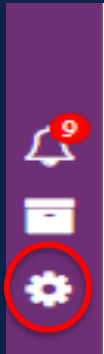
When you log in as an administrator this is the view you will get

The screenshot displays the administrative interface for the '1ST DEER PARK' group. The top navigation bar includes '1ST DEER PARK', 'Recent', 'My Account', 'Help', and 'Sign Out'. Below this, there are tabs for 'Add' and 'Actions', and a search bar for 'All Members (1 of 1 members)'. A dropdown menu shows the alphabet and 'ALL' and 'No Filter' options. The main content area is divided into four panels: 'Groups' (showing a tree view of Scouts Victoria, Lerderberg Region, Kororoit District, and 1ST DEER PARK with sub-groups ADULT and ROVER), 'Add eForm' (with a 'Medical' form icon), 'eForms' (with an 'Accessible to me' dropdown), and 'Staff Assignments' (displaying a message: 'You have no Staff with "All Members" access' and 'Staff below do not have access to this Organisation').

*Administrator = LIC of Group/District/Region

Updating Group Details

Many Groups are still sending information from the Executive Manager and an old email address.



Administrator name*

Administrator title

Administrator email*

This should be your name, the title of your role (ie Group Leader) and the generic Scouts Victoria email for your Formation

Updating Group Details

Staff Permissions

Individual Staff Permissions (applies to new staff)

The permissions have been moved to individual staff settings. The settings here will apply for any new staff.

Allow **new** staff to create eForms

Allow **new** staff to enable eForms

Allow staff to send SMS messages

Allow staff to send Push notifications

Allow staff to send Emails

Allow staff to take roll calls

Allow staff to create news articles

Injury Reporting

To allow injury reporting, please contact your hierarchy administrator.

A bit further down the Group settings page is the Staff permissions section

To allow your Staff (Leaders) to be able to create and enable eForms you will need to make sure this is ticked

Don't forget the Save button



Staff

Scouts Victoria staff ▾

Add ▾ Actions ▾

A B C D E F G H I J K L M N O

Owyne Zobel

OWYNE ZOBEL

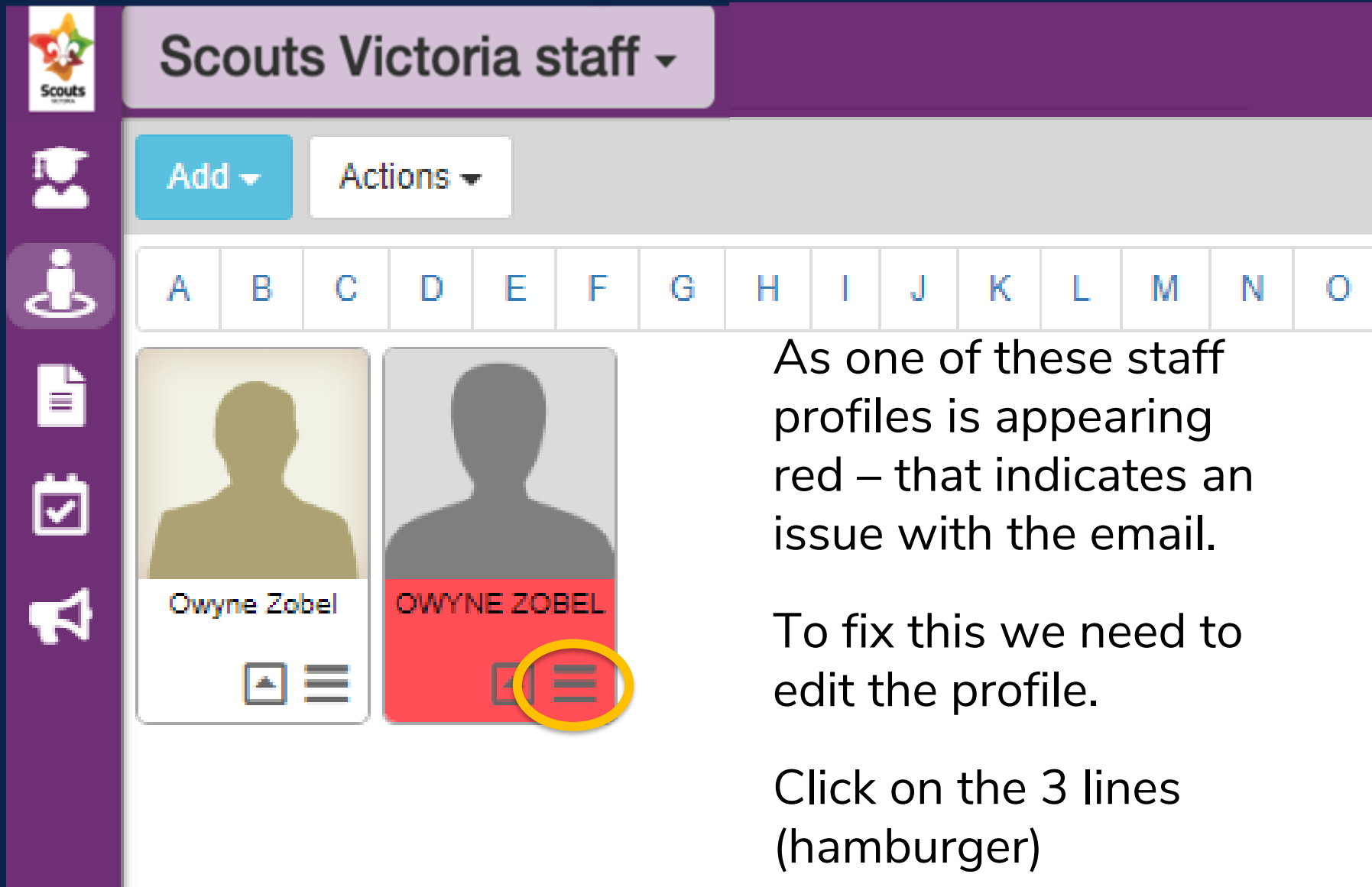
Profiles

WHITE	BLUE	YELLOW	RED	GREEN
Connor Allwood	Jackson Arundale	Isla Backhaus	Charlotte Bettington	Emily Cooper
Medical profile not received	Medical profile received	Managed locally	No email address or email bounced	A selected profile

*We first need to check if a Leader has already been added as a staff in Operoo and if there are any outstanding issues, before we can add.

*We also need to make sure that a staff is set up in the correct formation / level

Staff



Scouts Victoria staff ▾

Add ▾ Actions ▾

A B C D E F G H I J K L M N O

Owyne Zobel

OWYNE ZOBEL

As one of these staff profiles is appearing red – that indicates an issue with the email.

To fix this we need to edit the profile.

Click on the 3 lines (hamburger)

Staff

A pop up screen of the details will appear

You can see that the Member Request From = **Not Set**

We need to click on Edit Staff and then update the email address

Details for OWYNE ZOBEL

Staff Profile	Member requested from: Not set Member ID: 4060149
All eForm Responses	This staff will be automatically archived: Never edit
Audit Trail	Permissions (1)
Injury Reports	Tags (0)
Private Notes	Show Groups and eForms
Edit Groups and eForms	
Upload Action Plan	
Edit Staff	
Delete this request	

Viewed Profiles

Mobile App Signins

User Account Details
User has not yet created an account

Staff

Scouts Victoria staff

Add Actions

A B C D E F G H I J K L M N O

owyne zobel

Owyne Zobel

Click on the 3 lines (hamburger)

Once the email is updated the profile colour will change to White or Blue and you are good to go

Now remember before we saw how to update to allow for new Staff to be able to create and enable eForms?

After a change you may have to update these permissions individually

Staff

We can see that this staff member has 1 permission

By clicking on this we can see what that permission is

And we can edit these permissions for individual staff (Leader) if necessary

Just click the pencil and then tick or untick the appropriate boxes.

Details for Owyne Zobel

Staff Profile	This member belongs to the independent group named: Scouts Member requested from member ID: 4060149 Mobile phone: This staff will be automatically archived: Never edit
All eForm Responses	
Audit Trail	
Injury Reports	
Private Notes	
Edit Groups and eForms	
Upload Action Plan	

[Permissions \(1 \)](#)

[Tags \(0 \)](#)

[Show Groups and eForms](#)

Permissions (1)

- Create Parent and Student eForms**
- Enable eForms
- Add any members or groups to eForms

[Tags \(0 \)](#)

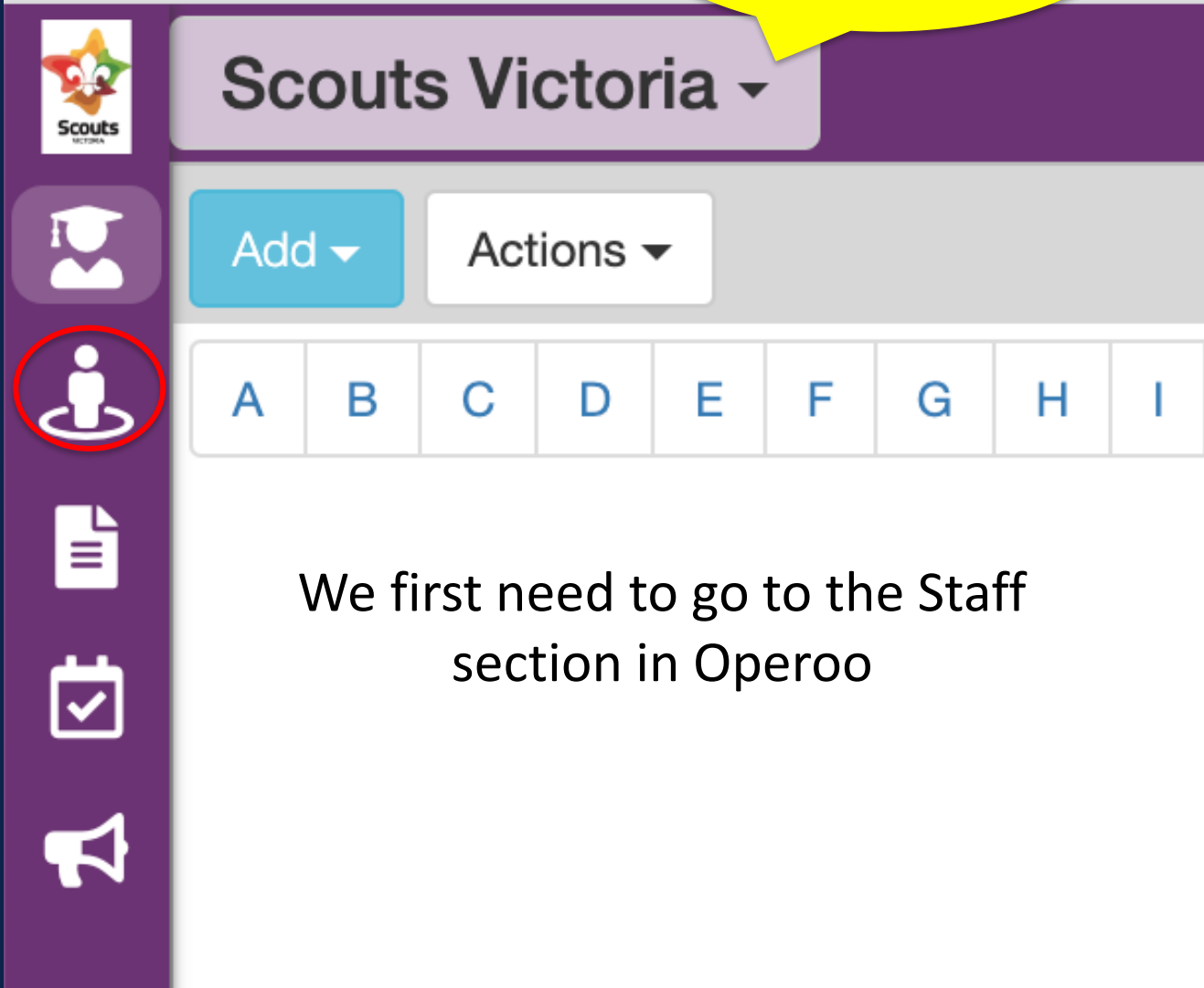
[Show Groups and eForms](#)

Adding Staff

Staff in Operoo need to be added and removed manually by an Administrator

This is not automatic based on a Leaders role in Extranet

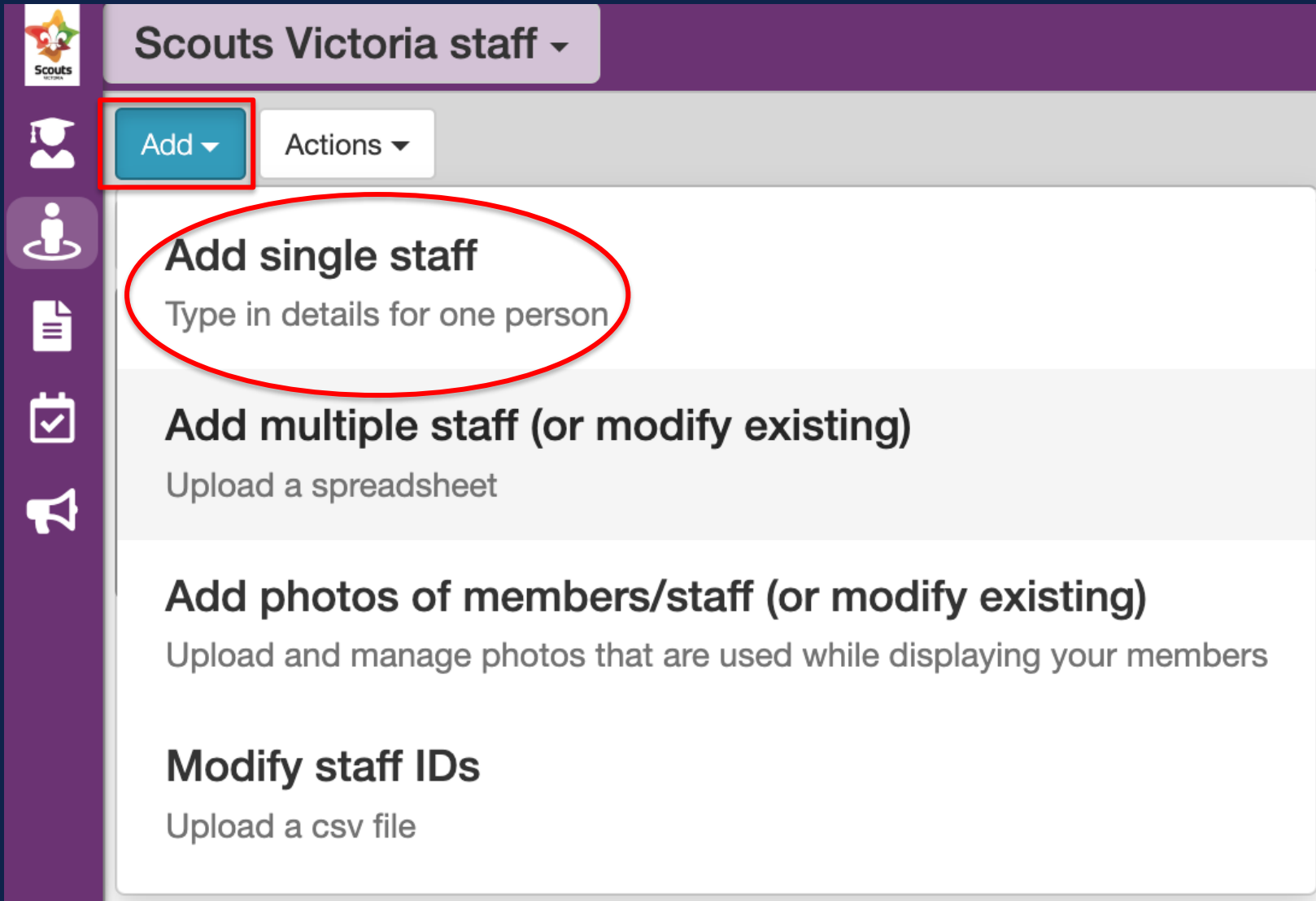
We are not adding a medical profile, we are adding a permission level



The screenshot shows the Scouts Victoria Operoo interface. At the top left is the Scouts Victoria logo. Below it is a vertical navigation menu with icons for a graduation cap, a person (highlighted with a red circle), a document, a calendar, and a megaphone. The main header area displays "Scouts Victoria" with a dropdown arrow. Below the header are two buttons: "Add" (blue) and "Actions" (white). A table with columns labeled A through I is visible. The main content area contains the text: "We first need to go to the Staff section in Operoo". A yellow speech bubble points to the "Scouts Victoria" header with the text: "This should show as your Group /District/Region".

Staff = in staff
area of Group/
District/ Region

Adding Staff



Scouts Victoria staff ▾

Add ▾ Actions ▾

Add single staff
Type in details for one person

Add multiple staff (or modify existing)
Upload a spreadsheet

Add photos of members/staff (or modify existing)
Upload and manage photos that are used while displaying your members

Modify staff IDs
Upload a csv file

Before adding a staff profile you will need the following details:

- Members Name
- Email Address (same one they already use for Operoo)
- Membership Number

Adding Staff

Fill in the Name, Member Number and Email Address

* If the member is only needed as a staff for a small amount of time please also fill in the auto-archive date

Profile request details

Email address used for initial profile request* [?](#)

Mobile Phone Number

Example: 0417123456

Secondary notification-only contact (optional)

Secondary email address for notification only

Secondary mobile number for notification only

Example: 0417123456

Cancel

Save

New

First name*

Last name*

ID

Example: 102934

Auto-archive member on

Example: 28 September 2022

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

Send Medical Reminder Emails

Use default group setting (currently 2 days) [v](#)

* If you forget to add the email address, you will still be able to add the staff profile but the member will not be able to access any details.

Click Save



Adding Staff

Scouts Victoria

1ST DOOKIE staff ▾

Add ▾ Actions ▾

A	B	C	D	E	F	G	H	I	J	K
---	---	---	---	---	---	---	---	---	---	---

Owyne Zobel

Staff you have added will appear here

A white or blue profile is good and a pink/red profile means that there is an issue with an email address

Now that we have added the Staff we need to assign them to the relevant section.

To do this we need to go back to the members page

Assigning Staff

All Youth Members (0 of 0 Youth Members) ? Search 2nd Mornington Sea Search

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL No Filter

You have no members, add some by clicking Add above.

Add Groups Add eForm Active eForms Staff Assignments

- Scouts Victoria - Trial Groups
 - Bays Region
 - Mornington Peninsula District
 - 2nd Mornington Sea Scouts**
 - AH
 - Cubs
 - Joeys
 - LDR
 - Rovers
 - Scouts
 - Venturers

Medical

Staff below do not have access to this Organisation

- Owyne Zobel

Live Chat

We can now see the staff we added in the staff assignments section

Assigning Staff

The screenshot shows the 'All Youth Members' page for '2nd Mornington Sea Scouts'. The page is divided into three main sections:

- Groups:** A tree view on the left showing the organizational structure: Scouts Victoria - Trial Groups > Bays Region > Mornington Peninsula District > 2nd Mornington Sea Scouts. Under '2nd Mornington Sea Scouts', there are sub-groups: AH, Cubs, Joeys, LDR, Rovers, Scouts, and Venturers.
- eForms:** A central panel with a search bar and a dropdown menu set to 'Active'. Below the search bar, there is a 'Medical' section with a green checkmark and a hamburger menu icon.
- Staff Assignments:** A panel on the right showing a message: 'You have no Staff with "All Youth Members" access'. Below this, a grey bar states 'Staff below do not have access to this Organisation'. A staff member 'Owyne Zobel' is listed with a green profile bar and a red circle highlighting the hamburger menu icon next to their name.

At the top of the page, there is a search bar for '2nd Mornington Sea' and a 'Search' button. Below the search bar is a navigation bar with letters A-Z and 'ALL', and a 'No Filter' option. A message at the top says 'You have no members, add some by clicking Add above.'

Click on the 3 lines (hamburger) on the staff member you wish to assign


Assigning Staff

When the pop up screen appears, tick the relevant section you wish to assign the staff member to.

Owyne Zobel - owyne.zobel@scoutsvictoria.com.au

To see and edit other details of **Owyne Zobel**, use the **Staff** link on the side bar.

Owyne Zobel has access to the following groups

 2nd Mornington Sea Scouts

 Cubs

 Joeys

 Rovers

 Scouts

 Venturers

Save

Assigning Staff

The screenshot displays the Scouts Victoria web interface. At the top, there is a header for 'Cubs (0 of 0 Youth Members)' with a search bar and a filter dropdown set to 'ALL'. Below this is a table with columns A through Z and a 'No Filter' option. The main content area shows 'No members to display'. On the left, a navigation tree shows the hierarchy: Scouts Victoria - Trial Groups > Bays Region > Mornington Peninsula District > 2nd Mornington Sea Scouts. Under '2nd Mornington Sea Scouts', the 'Cubs' group is highlighted with a red circle. In the center, there is a 'Medical' section with a green checkmark. On the right, the 'Staff Assignments' section is highlighted with a red circle and shows 'Owyne Zobel' assigned to the group. Below this, a message states 'Staff below do not have access to this Group'. A 'Live Chat' button is visible in the bottom right corner.

We can now see the staff member has been assigned to the Cub Section

Removing Staff

Staff in Operoo need to also be removed manually by an Administrator

This is not automatic based on a Leaders role or retirement in Extranet

We are not removing a medical profile, we are removing a permission level

This should show as your Group /District/Region

The screenshot shows the Scouts Victoria Operoo interface. At the top, there is a purple header with the Scouts Victoria logo and a dropdown menu set to "Scouts Victoria". Below the header, there are two buttons: "Add" and "Actions". A vertical sidebar on the left contains several icons, with the "Staff" icon (a person) circled in red. Below the sidebar, there is a table with columns labeled A through I. The main content area displays the text: "We first need to go back to the Staff section in Operoo".

Removing Staff

Scouts Victoria staff

Add Actions

A B C D E F G H I J K L M N O

owyne zobel Owyne Zobel

The screenshot shows the 'Scouts Victoria staff' management interface. At the top, there is a header with the Scouts Victoria logo and the text 'Scouts Victoria staff'. Below this, there are two buttons: 'Add' and 'Actions'. A navigation bar contains letters from A to O. Two staff member cards are displayed. The first card shows a photo of a woman and the name 'owyne zobel'. The second card shows a silhouette and the name 'Owyne Zobel'. The hamburger menu icon on the second card is circled in red.

Click on the 3 lines (hamburger) on the staff member you wish to remove

Removing Staff

When the pop up window appears we then need to click on Archive this Staff

A pop up will ask if you are sure you want to do this. Click the tick box and then the Archive button

Details for Owyne Zobel

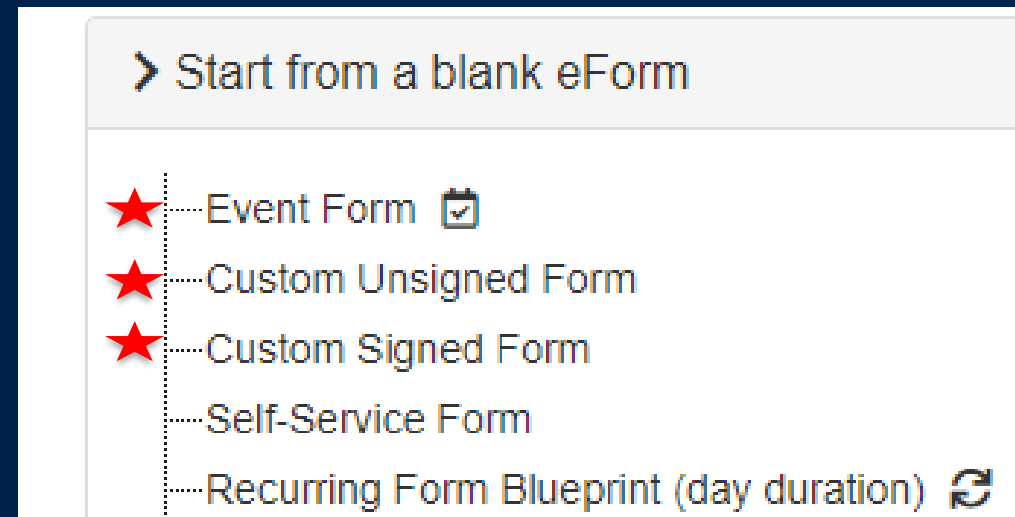
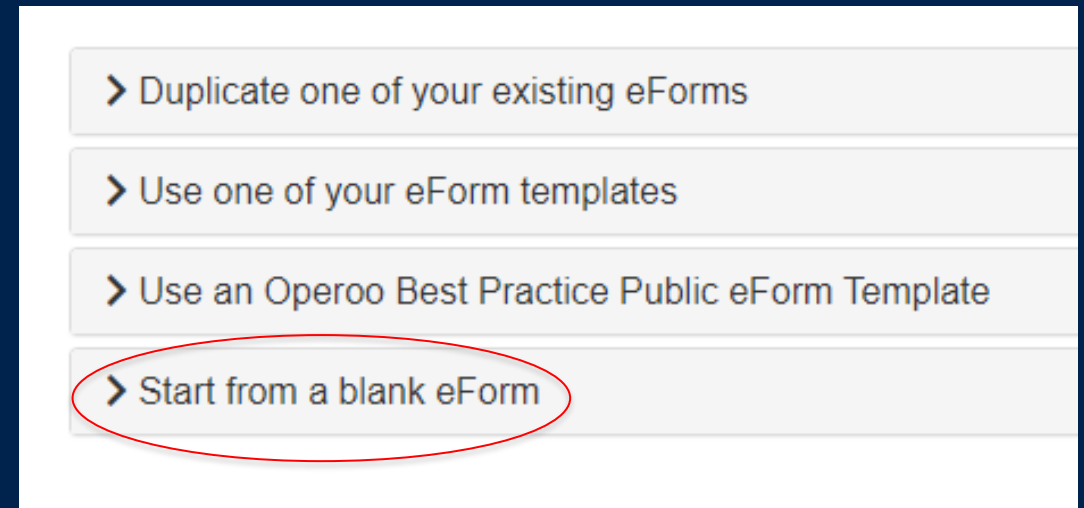
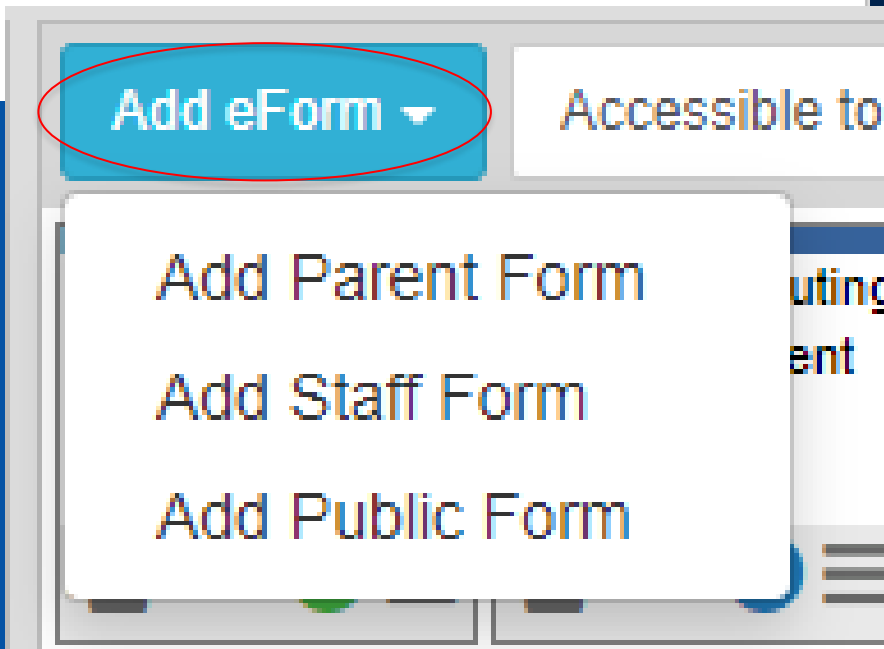
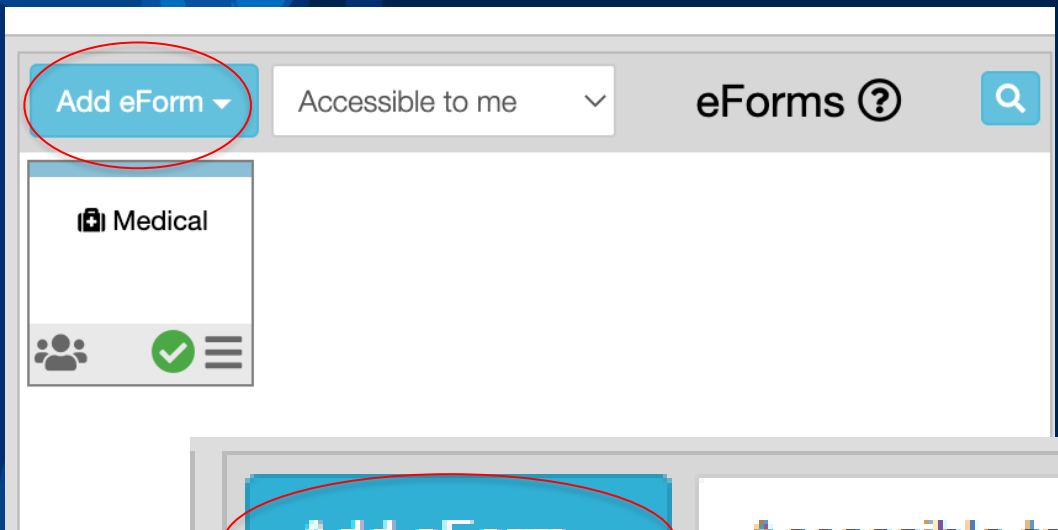
Staff Profile	<p>This member belongs to the independent group named: Scouts</p> <p>Member requested from member ID: 4060149</p> <p>Mobile phone: This staff will be automatically archived: Never edit</p> <div><p>Permissions (1)</p><p>Tags (0)</p></div> <p>Show Groups and eForms</p>
All eForm Responses	
Audit Trail	
Injury Reports	
Private Notes	
Edit Groups and eForms	
Upload Action Plan	
Edit Staff	
Archive this Staff	
Viewed Profiles	
Mobile App Signins	

Yes I understand and I am sure I would like to archive these staff.

[Archive](#) [Cancel](#)

Setting up an eForm




For Administrators



Filling in the Form

Title*
E.g. Year 7 Camp

Parent Form
A form for Student Contacts (e.g. parents or guardians), available for submissions

Reset Formatting **B** *I* U ~~ABC~~ **A** **☰** **☰** **☰** Helvetica 14    **-**

Placeholders **?**

Enter a description of the eForm here...

Questions

Multiple choice question Single choice question Single text line question Textbox question Yes/no question

Checkbox question Attachment request Appointment time Request volunteers Working with children check

Date request Table Multi columned list A time selection (hh:mm) request A number (integer or decimal) request

An email address request

Signatures

Signature Acceptance Participant acceptance

Additional Tools

Additional notes Attachment for user Payment request Body image

Here we add in a title for our event/camp/activity.

- I like to include the location and date where possible

You can enter whole documents like a flyer, gear list etc or you can add in questions for your members to answer if you want.

You can also leave all of this blank if you are just wanting this to be a place holder of profiles for an event.

- Don't forget the SAVE button at the bottom

Member Selection

Here we leave the selection as Static Members – We will return to adding member to the eForm later.

eForm Member Selection : testing

Questions / **Members** / Settings / Triggers / Preview / Enable

Member Selection

Static Members (selected members don't change unless you manually add or remove them) 0 members selected

To add or remove members, select 'Add/Remove Members' below.

Dynamic Members (members change automatically based on your criteria)

Click SAVE and NEXT button

Settings Page

This is the settings for the eForm and determines who can see it and how often the members will receive notifications about it.

There are 2 main things to note on this first bit:

- Frequency of Email reminders
- Up to Date Care Profile

Parent Form

A form for Student Contacts (e.g. parents or guardians), available for submissions

Access Restrictions

Only administrators with one of the following roles can edit the eForm or view and modify responses:

Super General

[Manage Administrator Roles for Scouts Victoria](#)

Restrict other contacts from viewing the responses

By default, all responses are viewable by other contacts of the same student. This option limits this viewing to only the contact who submitted the response.

Responses can be accepted and changed up until

Example: 12 Apr 2023

Frequency of reminder Emails

Every 2 Days

No Categories Defined

To change the categories that are available, [access categories in the settings section](#).

Requires up to date Care Profile? (emergency contacts and medical data)*

Yes - Must confirm care profile is up to date before replying (members must already be in Medical eForm)

No

Add eForm replies to the profile

If selected, replies are added to profiles as additional information. This information can then be accessed by staff on mobile devices (online mode only) and the secure website. If not selected, replies are only available to be viewed by administrators.

Settings Page cont.

Most of these settings you can leave as is but feel free to adjust if needed.

Main points to make sure you have the right information for are:

- Email notification and eForm responses
- Reply to*
- Automatically archive eForm after

And don't forget to choose a colour for the eForm

SAVE and NEXT



Add eForm replies to the profile

If selected, replies are added to profiles as additional information. This information can then be accessed by staff on mobile devices (online mode only) and the secure website. If not selected, replies are only available to be viewed by administrators.

Allow staff to SMS

Enable this to allow staff to SMS the group, overrides default setting

Display staff contact details

Enable this to allow staff to be able to see other staff contact details who are assigned to this eForm

Track Membership Changes

Once enabled, this form will be periodically tracked for membership changes.

Send email notification when an eForm response is submitted or changed to:

Email addresses entered here will receive an email notification whenever a response to this eForm is received or changed. For multiple emails, use a comma to separate (eg. john@example.com, smith@gmail.com).

Reply to*

If a user clicks reply to an email message, this email address will receive the reply.

Automatically archive this eForm after

If a date is entered here, the Operoo system will automatically archive this eForm after the date has passed.

Select the colour of eForm box on the Main Screen



Save and Next

Back

Finishing up the eForm

eForm Request Preview : testing


Questions / Members / Settings / Triggers / **Preview** / Enable

Send Test Email

Enter an email address and we'll send you a preview email

Send Test Email

Preview of your eForm



testing **Print**

Back **Next**

eForm Request Enable/Disable : testing

Questions / Members / Settings / Triggers / Preview / **Enable**

This form is currently not enabled

Enable Now

or

Once enabled, this Form becomes visible and emails begin sending

Back **Done**



Adding Members

- Using the Membership numbers you can bulk upload members to the form:

MANAGE EFORM

Edit eForm

Upload an eForm image

Assign/Delegate Staff

Sort members into Groups

Bulk Add Students

Bulk Remove Students

Save copy as a template

Trigger Activity

Delete this eForm

Bulk Add Students

Cut and paste Profile ID's into the area below to add these members to **test**
Profile ID's are separated by spaces, new lines, commas or tabs

Simulate only - just show me what would be done

Add Students

Alternative Solutions for District, Region and State Events

- Each group creates an eForm
- Each group adds the designated camp first aider to the eForm as a staff
- Not all leaders need access to all youth's files
- You may need to reach out to the level above ie Region or State depending on who is attending to create the eForm

Where do I go for help?

Recent ▾

My Account ▾

Help ▾

Sign Out



FAQs

Terms and Conditions

Privacy Policy

Support

Where do I go for help?



Leader Resources

Policies

Resources for Group Leaders

Forms and Tools

Program Resources

Safety

Marketing

Fundraising and Grants

▼ Info Book 2023

▼ 2023 Program Planner

▼ Member Status Check

▼ Adult Forms

▼ Individual Adult Volunteer Plans

▼ Youth Peak Awards - Notice of Completion Forms

▼ Operoo Help and Personal Health Records

▼ Child Safe Scouting

Questions

