

Scouts Victoria and

operoo



Scouts
VICTORIA

Session Overview

- Operoo (Intro, privacy & how it works)
- Different Views (depending on access level)
- 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




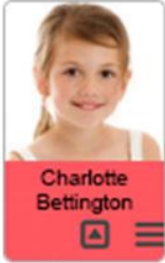

Sharing an Existing Profile

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

- 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](#)



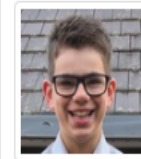
Nastasia ZOBEL
Female, 14 year old






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

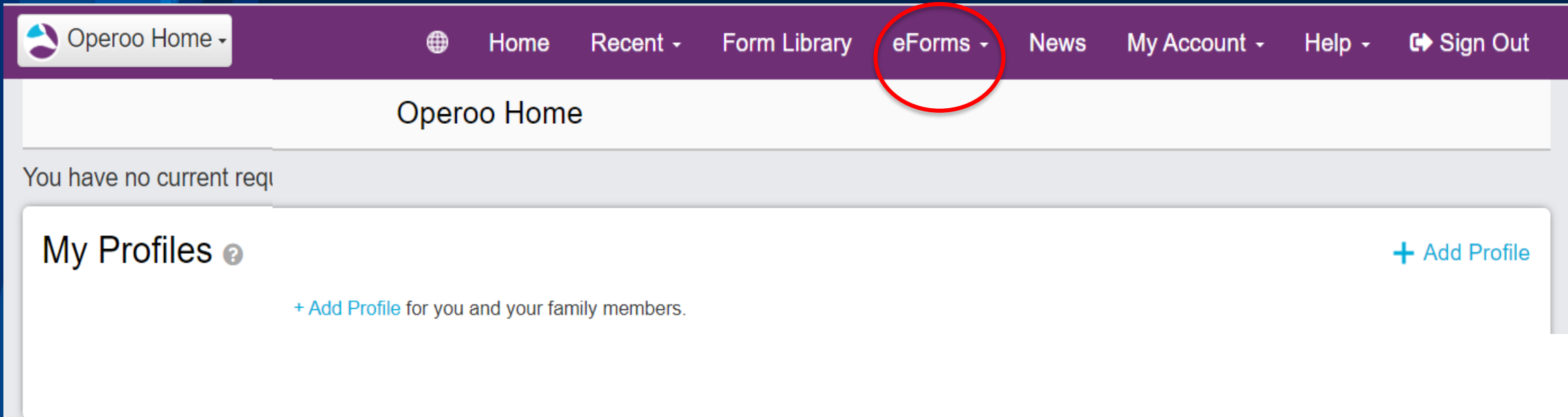
Operoo Central View

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



Setting up an eForm

For YPL & PSL listed as staff



The screenshot shows the Operoo Home interface. At the top, there is a purple navigation bar with the following items: Operoo Home (with a dropdown arrow), a globe icon, Home, Recent (with a dropdown arrow), Form Library, eForms (with a dropdown arrow and circled in red), News, My Account (with a dropdown arrow), Help (with a dropdown arrow), and Sign Out (with an external link icon). Below the navigation bar, the page title is 'Operoo Home'. A message states 'You have no current req'. Under the heading 'My Profiles' (with a help icon), there is a '+ Add Profile' link and a note: '+ Add Profile for you and your family members.' Another '+ Add Profile' link is visible in the top right corner of the profile section.

NOTE: If you do not see eForms on your Operoo screen then please contact your Group Leader or Member Services for assistance

NOT all options we go through may be available to you – if this is the case please speak to your Group Leader or Member Services for assistance

Setting up an eForm

For YPL & PSL listed as staff

1

eForms ▾ News

My eForms

Delegated eForms

2

eForm Requests

Your existing eForms for Scouts Victoria

Add eForm ▾

3

Add eForm ▾

Add Parent Form

Add Staff Form

Add Public Form

4 > Start from a blank eForm




- Event Form
- Custom Unsigned Form
- Custom Signed Form

Select 1 of the above

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

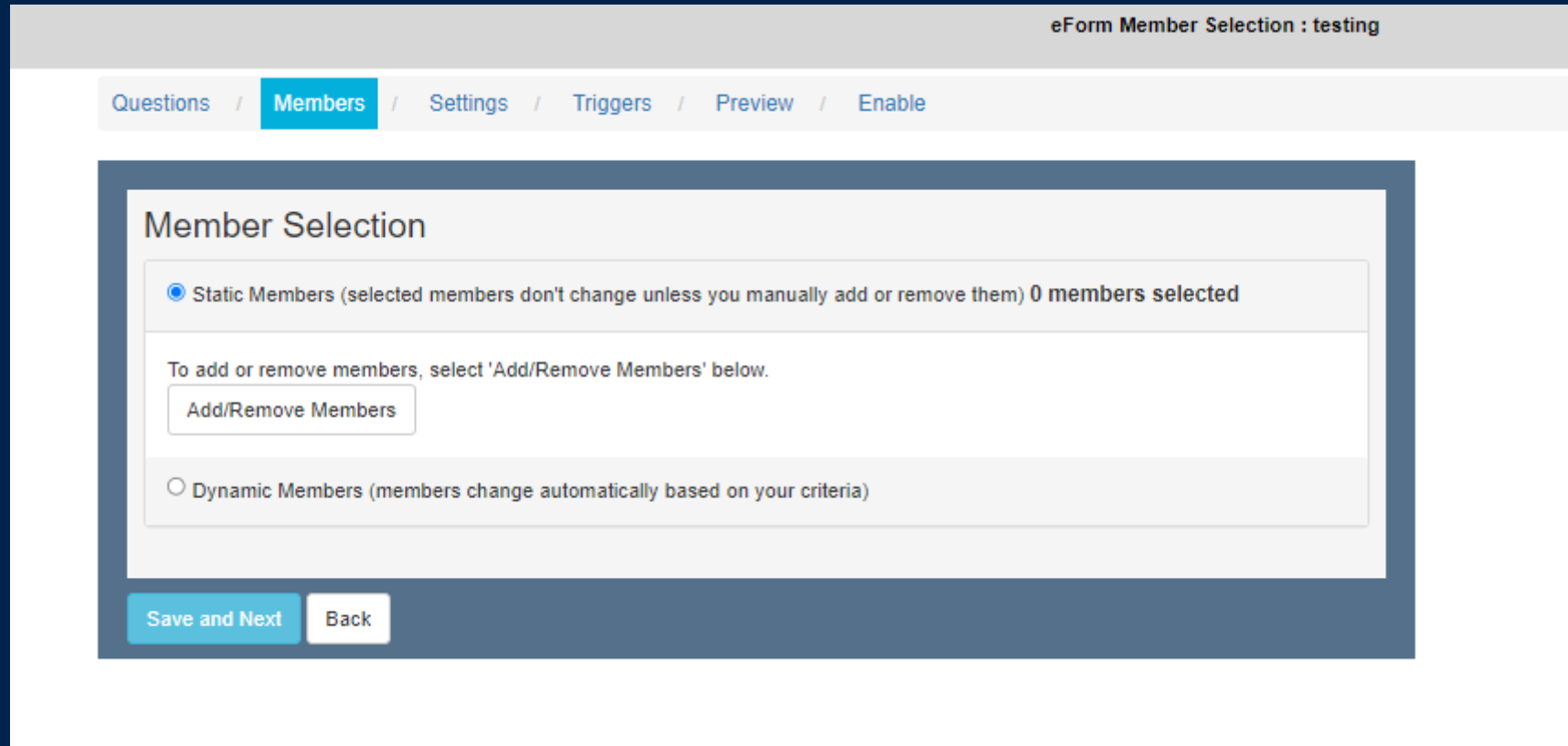
You can enter whole documents like a flyer, gear list etc or you can add in questions for your members to answer if you want.

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 members to the eForm later.



The screenshot shows a web interface for 'eForm Member Selection : testing'. At the top, there is a breadcrumb trail: Questions / Members / Settings / Triggers / Preview / Enable. The 'Members' tab is active. The main content area is titled 'Member Selection' and contains two radio button options. The first option, 'Static Members (selected members don't change unless you manually add or remove them) 0 members selected', is selected. Below this option is a text prompt: 'To add or remove members, select 'Add/Remove Members' below.' followed by a button labeled 'Add/Remove Members'. The second option, 'Dynamic Members (members change automatically based on your criteria)', is unselected. At the bottom of the form, there are two buttons: 'Save and Next' and 'Back'.

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.

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

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



Finishing up the eForm

Send yourself a test email so you can see what everyone else sees

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

Once you enable an eForm it starts sending emails to the participants (members) you have or will add

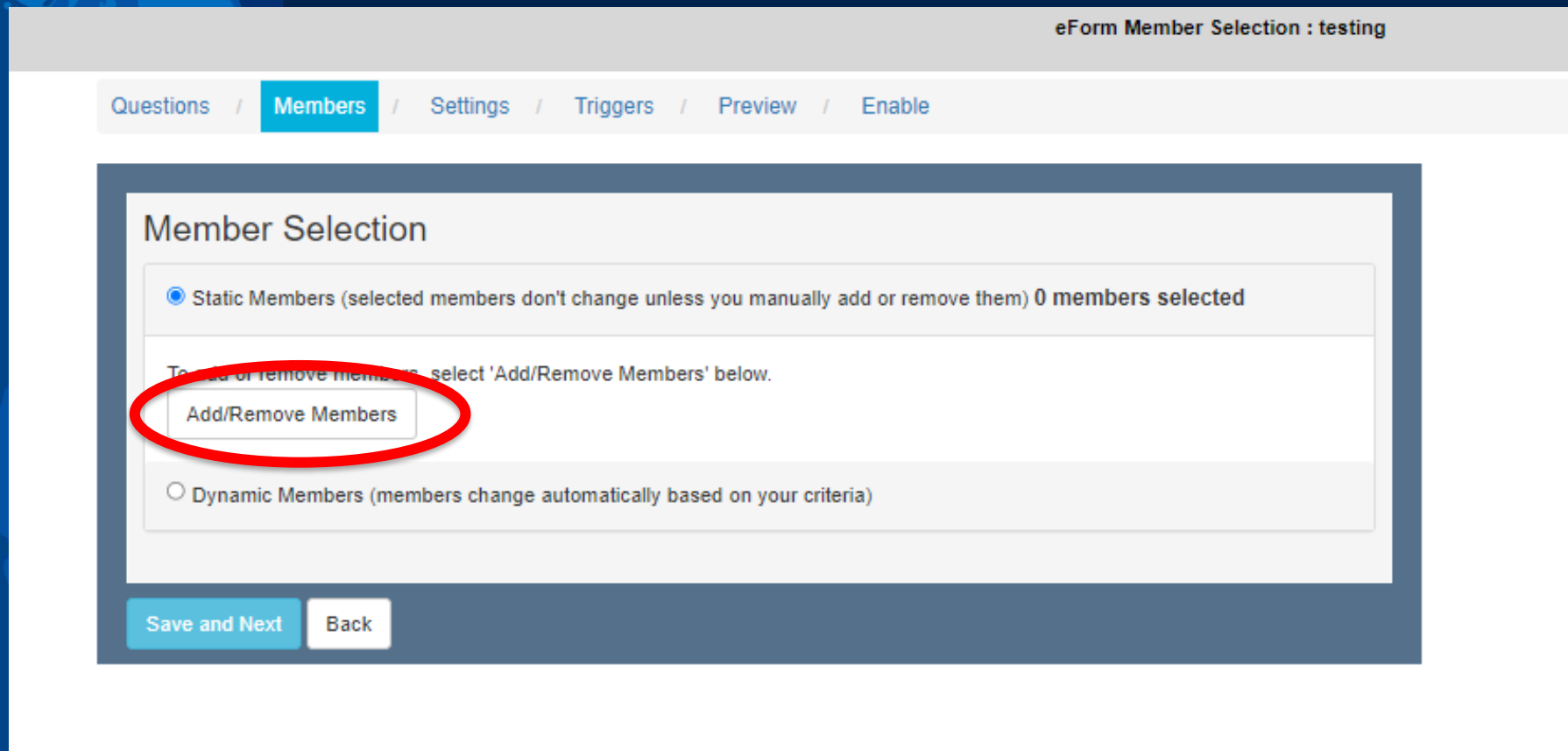
Note: your GL may not allow you to enable eForms – if this is the case please contact them to enable for you.



Adding Members

To add members to your eForm you can do this at the time of setting up the form by selecting Add/Remove Members on the members tab of the eForm.

Note: you can only add members if your GL/DC/RC has approved you to be able to do this



The screenshot displays the 'eForm Member Selection : testing' interface. At the top, there is a navigation bar with tabs: Questions, Members (highlighted), Settings, Triggers, Preview, and Enable. Below this, the 'Member Selection' section is visible. It features a radio button for 'Static Members (selected members don't change unless you manually add or remove them) 0 members selected'. Below this, a text prompt reads 'To add or remove members, select 'Add/Remove Members' below.' The 'Add/Remove Members' button is circled in red. At the bottom of the section, there are two buttons: 'Save and Next' and 'Back'. Below the main content area, there are two radio buttons: 'Dynamic Members (members change automatically based on your criteria)' and another unselected option.

Adding Members

test - Owyne — Manage Members

MEMBERS GROUPS

Search groups and forms

Cardinia District

MEMBERS FORMS

Cardinia District Cub Leadership Camp 19th- 21st August
TEST - Operoo for YPL/PSL Staff
test - Owyne
2023 Cardinia District Cub Scout Leadership Camp 16th-18th June
Cardinia District Patrol Leaders weekend

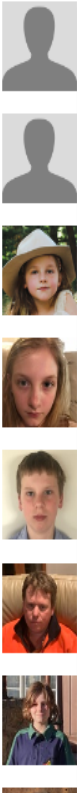
Confirm Cancel

When the Manage Members window opens select the Group/District/Region that you have been assigned as a Staff member for.

Note: the larger the amount of members in a Group the longer time it will take to load.

MEMBERS (459) **SELECT ALL**

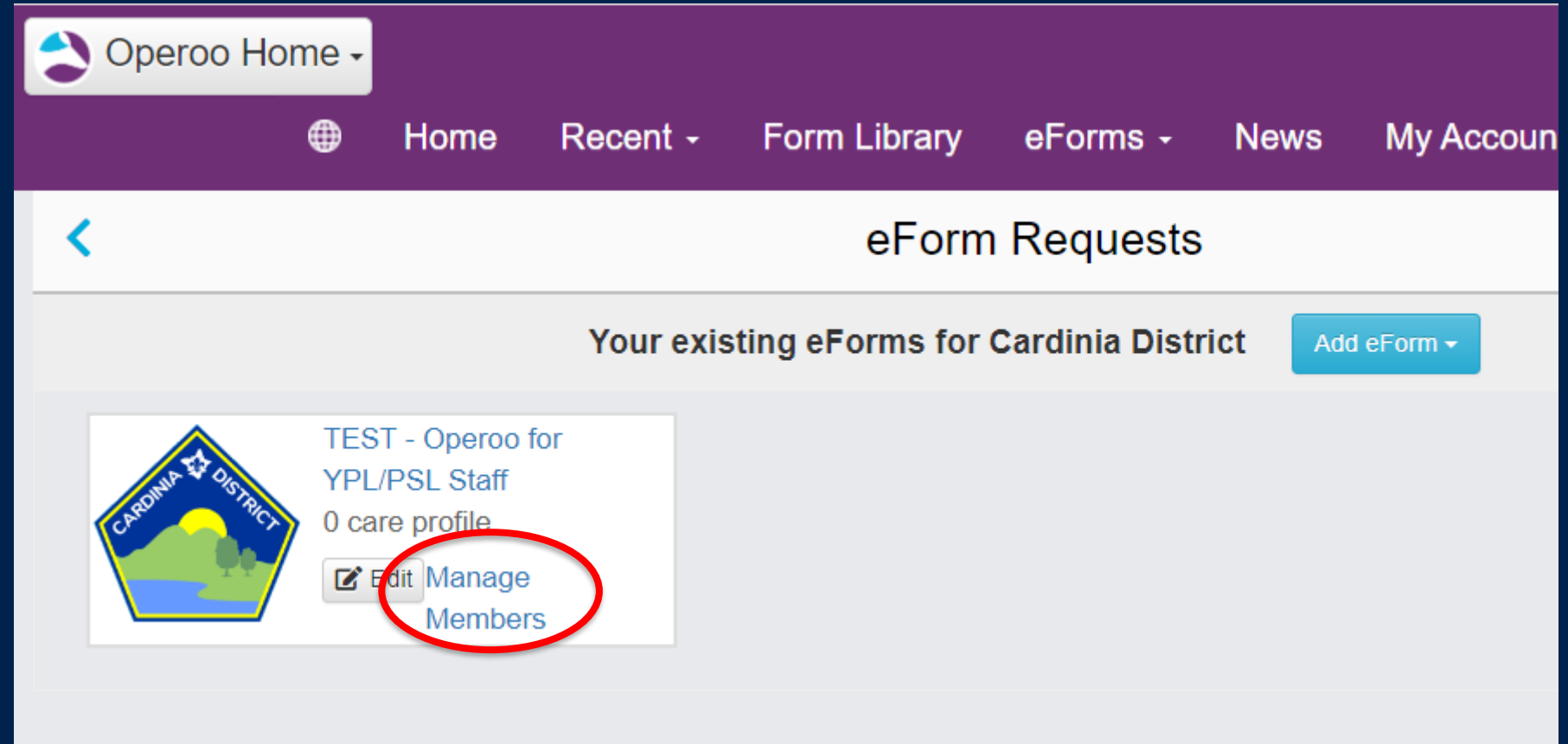
Search by name



When the list of members appears, either click the Select All button or select individual members

Don't forget to click Confirm when done.

Adding Members



The screenshot shows the Operoo Home interface. At the top, there is a navigation bar with a globe icon, 'Home', 'Recent', 'Form Library', 'eForms', 'News', and 'My Account'. Below this is a section titled 'eForm Requests' with a back arrow on the left. Underneath, it says 'Your existing eForms for Cardinia District' and has an 'Add eForm' button. A card for 'TEST - Operoo for YPL/PSL Staff' is displayed, showing '0 care profile' and a 'Manage Members' link circled in red. The Cardinia District logo is also visible on the card.

If you forget to add the members during set up you can get back to this by going to your eForms and then clicking on Manage Members on the eform you need to add members to.

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 District, Region or State depending on who is attending to create the eForm
- Large events may require you to send a list of Members names and member number to your GL, DC, RC etc to bulk add members to an 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

