Group Contact/Admin

What can you do?

Administer your group which includes:

1. Amend Group info i.e. meeting place, age group, contact info
2. Amend Group Contact info
3. Manage child registrations
4. Importing CSV spreadsheets *(bulk upload of child registrations)*
5. Set up Group events
6. Can view adult membership contact info/membership & DBS for leaders in your group
7. Send Group wide and individual communications
8. Can generate & view invoices
9. Reports - <mark>*coming soon*</mark>

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1. Amend Group info i.e. meeting place, age group, and contact info

- Go to your **Groop** dashboard
- Click **Groop settings** tab on the blue panel to the left-hand side of your screen
- Amend the information
- Click the **Update Groop details** button to save the changes

Notifying us of new groups or closures

- If a new group has opened complete a new group registration form found at https://woodcraft.org.uk/resources/new-group-registration-form and email it to info@woodcraft.org.uk so a new Groop dashboard can be set up for you.

- Email info@woodcraft.org.uk to let us know if your group has closed so we can change the status on our Groop system, update our records and support you to formally wind up the group.

- Let us know if your group has merged with another group in your district by emailing info@woodcraft.org.uk. We will close one of your groups, update our records and invite all the members to the newly merged group.

2. Amend Group Contact info or add a new admin

- Click **People** tab on the blue panel to the left-hand side of your screen
- Here you will find a list of all your members registered to your group
- If you wish to change the role of your Group Contact to a member who is already on your list, left click on their name and click **Edit**
- On their summary page go to the field labelled **Role** and from the drop down select/deselect **Group Contact.**
- Scroll to the bottom of the page and click the **Update user** button

If a Group Contact is stepping down and you want to add a new person to be listed as the Group Contact, please follow instructions below:

- Click **People** tab on the blue panel to the left-hand side of your screen
- Click the **Create user** button
- Select the role type i.e. Group Contact etc.
- Enter the members name in the first and last name fields
- Enter in their email address
- Scroll to the bottom of the screen and slide the **Add Email to Invite User** button to right so it appears green
- Click the **Save user** button to save changes and to send the new Group Contact/user an invite to join

N.B. Please remember all Group contacts need to be members of Woodcraft Folk and have an up to date DBS.

- To view an Officeholders or adult members contact information, scroll to their name on the list, click their name and select **Edit**. This will take you to their summary page.

3. Child registrations - *managing your group register*

The system is now live and ready for your children and young people to register. We advise in the first instance to invite parents to sign up their children, create a login and complete the online form. You'll no longer need to rely on paper forms and parents will have 7 days to respond to the request. All new children/parents should be invited to use the system as and when they join.

==An email address (unique identifier) can be used only once within the Groop system, so we'd recommend for siblings in the same group or if parents are members you use the 'Guardian' system explained below.==

See below the TWO options to register a child in your group:

<u>**Registering a lone child whose parent is not a member of Woodcraft Folk**</u>

- Click 'People' tab on the blue panel to the left hand side of your screen
- Click the 'create person' button
- Select the role type i.e. child/ young person
- Enter the child's name in the first and last name fields
- Enter in the parent/carer's email address
- Scroll to the bottom of the screen and slide the 'invite member' button to right so it appears green
- Click the Save User button to save changes and send an invite to join the group
- The parent will be sent a request to join the group

You will need to do the above for all children on your register. For those who do not have an email address you can enter their information manually from the forms you hold on record, but should try and encourage parents to provide an email address to begin using the system.

Once the parent/carer has been sent an invite, you'll need to forward to them a data request to fill in a child registration form.

Sending a Data Request

- Click 'People' tab on the blue panel to the left hand side of your screen
- To send a data request to some or all the children on your list click the 'show filters' button

- Filter boxes will appear select the 'Role' box and from the dropdown click child.
- To add more filters to refine your search click the 'add new filter' button and from the drop down select more filters. We recommend using 'created at' to filter for new children added.
- Once you have selected your filters click the 'submit sections' button
- A list of all the fields within the child registration form will appear in a new window
- Select the fields (will highlight green) which you'd like the parent/carer to answer
- Click submit sections to send email data request to all the parent/carers in your list
- The request will last for 24hrs. If the parent/carer does not respond within this time you will need to send the request again

You can send a data request to just one individual:

- Click 'People' tab on the blue panel to the left hand side of your screen
- If you are the current Group Contact, left click on your name and click Edit
- To the top of the form. Click the button 'submit sections to user'
- Select the fields (will highlight green) which you'd like the parent/carer to answer
- Click submit sections to send email data request to the parent/carer
- The request will last for 24hrs. If the parent/carer does not respond within this time you will need to send the request again

We recommend sending data requests to parents periodically to ensure details are up to date, beginning of each term for example.
**Records will appear active on your lists once the individual has responded to your request to join.*

Individuals who do not have an email address associated to their account will continue to appear as inactive.

Registering a child who has siblings in your group or their parent is a member of Woodcraft Folk

Guardians

In the instances when there are siblings in a group or the parent/carer is already a member of the group or is the Groop admin, we recommend trying out the 'Guardian' facility. Electing someone to be a Guardian on the system means they'll be able to login as their child and make online payments and book events on their behalf.

- Parent/carer must already be invited user to the group
- Click 'People' tab on the blue panel to the left hand side of your screen
- Click the 'create person' button
- Manually add the child/children to the system by creating a person in the 'People' section. You will need to add all the information from the completed registration form i.e. home address, doctor info, allergies etc. DO NOT ADD THE PARENTS EMAIL TO THE RECORD.
- Toward the bottom of the form you'll come to the Guardian Section.
- Go to the dropdown labelled 'Allow guardians to login on behalf' and select Yes
- Select from the list of members the parent/carer
- Click 'Create User' button

The selected Guardian will now be able to log on to Groop on behalf of their child ([guidance for parents will be available via our website)](#) by selecting the 'My Dependants' button found on the blue left hand tssk bar.. A parent/carer can be a Guardian for more than one child in your group which will help with siblings.

Guardians are now able to receive data requests on behalf of their children so they can complete the registration information. See instructions on how to send a data request above, but instead select that the request goes to the parent or guardian email.

Guardians will also receive a copy of each communication, invoice and event invitation sent to their child/young person.

For more guidance on this click here: https://knowledge.groop.com/how-do-i-submit-sections

Records will appear active on your lists once the individual has responded to your request to join. Individuals who do not have an email address associated to their account will continue to appear as inactive.

Removing a child who has left the group

In line with our recordkeeping and retention guidelines child registrations should be kept for 3 years from the date signed (https://woodcraft.org.uk/child-protection-reporting-and-record-keeping-guidelines). For this reason groups are unable to delete child records from the Groop system instead you can archive records.
We'll ask Groop to permanently remove archived children periodically from the system.

- Click 'People' tab on the blue panel to the left hand side of your screen
- Left click on the name of the child you wish to remove
- And click archive

Please note that ONCE A RECORD HAS BEEN ACTIVATED, you'll be unable to change an email address, this has to be done by request to Groop or Folk Office. (This is a temporary measure)

Groop Knowledge Base article - https://knowledge.groop.com/my-dependants

4. Using Groop Import - How do I import my CSV file into Groop?

Admins, and Group Contacts are now able to bulk upload child registrations to Groop in the people section. If you have a CSV file (spreadsheet) of child registrations or wish to create one, you can now easily upload all of their information to the platform with a few clicks of a button.

Preparing your spreadsheet
Firstly you will need to prepare your spreadsheet so that it is compatible to and the data will easily upload to the Groop system.

1. The file must be CSV format, other file extensions eg. XLS are not supported.
2. Make sure your spreadsheet has all of the field headers available and as much filled as possible as you cannot merge data using the CSV import function at a later date
3. The first row of the spreadsheet must contain the column headings, see example below:

First Name	Last Name	Email	Telephone	Role	Label
Mickey	*Miles*	*m.miles@hotmail.com*	*07553456456*	*Child*	*Elfin*

4. The title of each column is not important but if the header cell is empty, the entire column will be ignored

5. Roles assigned to a user must already exist and must be an exact match i.e. case specific

6. Labels assigned to a user must already exist and must be an exact match I.e. case specific

7. Date of birth and any other date field must be in ISO 8601 format:

   22 Jan 2020
   Jan 22, 2020
   22 Jan 20
   MM/DD/YYYY is not compatible (US date format)

8. Any select or multi-select fields on the online child registration, such as Gender, Ethnicity or a Custom Field created for your Groop, must already exist and the details to import must be an exact match i.e. case specific.

9. When importing information into one of the default fields i.e. name, role etc, the CSV import must match our system. The options needed to be entered in to the CSV can be found in the tables available at
   https://knowledge.groop.com/how-do-i-import-my-csv-file-into-groop

10. Columns not required when importing can be 'Unassigned'. This data will not be imported
    - Email addresses must be unique, records can not share an email address
    - Importing will NOT merge or edit existing users. Basically you've got one go at this

Instructions on how this works is available in the Groop Knowledge Section. https://knowledge.groop.com/how-do-i-import-my-csv-file-into-groop

Uploading your CSV spreadsheet

1. Got to the 'People' section
2. Click the 'upload CSV' button found toward the top right of screen
3. The 'Map CSV field' box will pop up
4. Match the names headers in the 1st column to the names of your headers in the assign column
5. Select unassigned if you do not wish the data for that particular column to be imported
6. Press the confirm changes to import the registration information

11. Set up Group events

You can set up regular group events, one-off trips, camps and meetings using the online events function.

These events will be bookable for your parents/children/leaders to attend and pay/donate for in advance. See instructions below to set up an event.

- Click **Events** (not 'My Events') tab on the blue panel to the left-hand side of your screen
- Click the **Create Event** button
- Enter your event information including date, time and event info, if applicable.
- To invite member's, click the **Invite** button at the top of the page and select the participants you wish to invite. We recommend sending invites to child and parent roles to ensure all email invites are received.
- *Filter your list by role to make it even easier to send invites to select members in your group.*
- When you have finished creating your event, click the **Create Event** button.
- You can repeat the event each week for up to 4 weeks, if applicable, so that it is available to book regularly. To do this, on the Events dashboard, left click the event – on the drop down which will appear, select how many times you want to repeat the event.
- To make any amendments to your event, left click on the event name and select **Edit.**

*All events will be listed in the participants **My Events** when they're available to book, if they have been invited to that event.

To view an event

To make any amendment or view your event, left click on the event name and select **Edit** from the drop down. Here you will find this task bar, which you can select.

Explanation of the above headers:

- **Details –** *information regarding the event, date, time, address etc*
- **Plan** *- Details about the activity to share with members (if applicable)*
- **Invited –** *Invite your members (adults and children)*
- **Registration** *- Can select who attended*
- ***Evaluation** - Can update event with details of an evaluation*
- **RSVP** *- Look at a list of registered participants and those who have declined*
- **Invoice** *- Invoice information for paid events*

To cancel an event, go to:
- Click **Events** (not My Events) tab on the blue panel to the left-hand side of your screen
- Click on the name of the event you wish to cancel
- Change event name from '**Event name' to 'CANCELLED - Event Name'**
- Add reason for cancellation in Event Description.
- Click **Update Event**
- Once you have changed the event name please use either Communications tab or GroopChat to contact all members regarding the cancellation of the event.

See Groop Knowledge Base article - https://knowledge.groop.com/events

12. Can view adult membership contact info/membership & DBS for leaders in your group

*This functionality is not yet available. Whilst we continue to develop the site with Groop we're asking groups not to add too many PARENT/CARERS, MEMBERS, OCCASIONAL HELPERS OR ADDITIONAL Adults will be added to the system as part of the membership phase. **For the meantime to continue to use our old database to check both membership and DBS for adults and DF members.***

13. Send Group wide and individual communications

My GroopChat

Parents and leaders can receive messages and communicate with each other using the My GroopChat facility. This is a secure forum to share updates, post notifications, share good practice and fun ideas.

- Click on the **My GroopChat** on the left-hand side panel
- Create a new thread for everyone to see by typing a message in the **Write something** box at the top of the page

- To attach images or files, click the small **attachment** icon
- You can also **comment** on previous posts by clicking on the post and typing in the box below
- To like a comment, click the **Heart** button

Whenever a new post is created or one of your posts is commented on you will receive a notification.

Sending a message to all users in a specific Sub Groop

- From within My GroopChat choose your specific Sub Groop from the **Post to** drop down
- Create your post and attach photos or documents if required
- When you're ready press the **Post Comment** button

Send to specific person or people

- From within My GroopChat choose who you want to send the message to via an **Email, Name or Label** which you enter in the **Send Privately** field**.** e.g. everyone with a label '**Common Ground participants'**
- From the resulting list you can then choose an individual or add all
- Create your post and attach photos or documents if required
- When you're ready press the **Post Comment** button

<p align="center">**Groop Knowledge Base article - https://knowledge.groop.com/groopchat**</p>

Communications

The Groop platform allows you to communicate in many ways with your users. One of which is through the communications area of the platform using Email.

- Click **Communications** on the left-hand side panel
- You can see an overview of all the emails you have sent on the main communications page
- To create a new email simply go to **Create new communication**
- You can now create your email with the **Subject and Content**. The **reply** email will be the email of your Groop account. You can change this by replacing it with an alternate address.
- Once you're happy with the information that you have entered you can filter the users and select the recipients to receive the communications by moving the slider buttons next to each individual name.
- You can save your email to send at a later date via the **Save Email** if required
- Once you're happy you can send the email
- When back in the main Communication page you can also **View** sent emails, **Clone** emails and also **Delete** any that are no longer needed.

<p align="center">**Groop Knowledge Base article - https://knowledge.groop.com/communications**</p>

14. Can generate & view invoices

As a Group contact you have the ability to generate invoices at group level. Invoices can be generated for events, one off trips and subs etc. Parents are then emailed with instructions to pay. They can either make payment online using stripe or you can include account details for them to make a bank transfer.

Please note you will be unable to generate invoices until your stripe account is activated *(see instructions in Treasurer Sections).*

- Click the **GroopPay Admin** option from the left-hand side bar.
- Fill in the invoice fields with relevant information such as reference number and a message to the recipients.