

SCOUTS AUSTRALIA – WESTERN AUSTRALIAN BRANCH



# Scoutrak Manual

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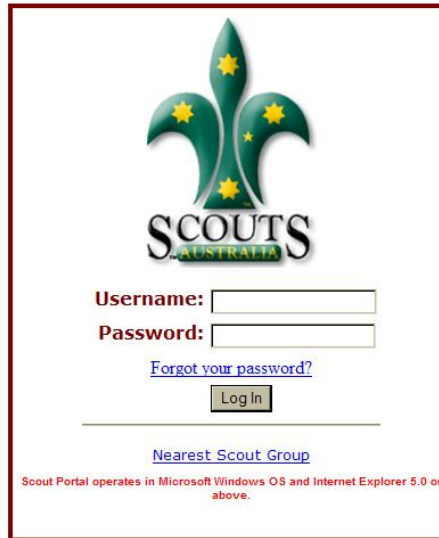
# 1 Introduction to Scoutrak

## 1.1 Login to Scoutrak

Have you received your username and password? If not, contact WA Branch Office on 9480 4200 or email [enquiries@scoutswa.com.au](mailto:enquiries@scoutswa.com.au)

1. The address for Scoutrak is <https://www.vicscouts.asn.au/portalwereal>, or you can use the link on the Scouts WA website [www.scoutswa.com.au](http://www.scoutswa.com.au).
2. Enter your username and password.

*\*Please note that the password field is case-sensitive.*



3. Click the [Log In] button
4. A successful logon will take you to the Home page of Scoutrak. If the username or password you are using are incorrect you will received a message advising the details could not be 'authenticated'. Try logging on again.

*\*Use the Forgot your password? option if you are unable to access Scoutrak with the logon and password details you have entered.*

*\*After 5 incorrect attempts you will be locked out of Scoutrak and will need to contact [enquiries@scoutswa.com.au](mailto:enquiries@scoutswa.com.au) to have your account unlocked.*

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## 1.2 Scoutrak Navigation

### 1.2.1 Primary Menu Options

Scoutrak primary menu options are located across the top of the website and are visible at all times. Depending on your access, you may or may not be able to see all of these options.

These options are:

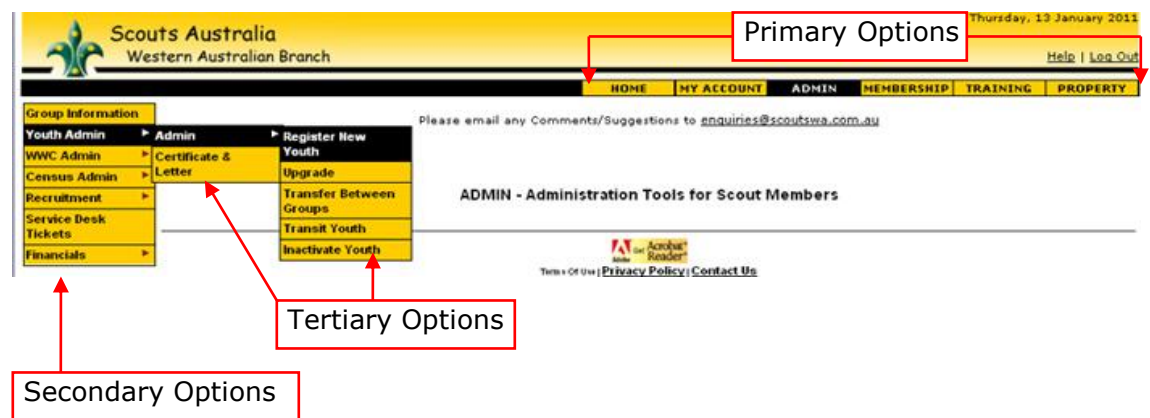
- Home
- My Account
- Admin
- Membership
- Training
- Property

### 1.2.2 Secondary Menu Options

Secondary menu options are related, by subject, to the primary options and are located on the left hand side of the screen. These options appear when you click on a primary option.

### 1.2.3 Tertiary Menu Options

Tertiary menu options are related to the secondary and primary options and are visible when you move your mouse pointer over a secondary option. These options will appear alongside the secondary options.



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## 2 Home

### 2.1 New Joined Members

This link generates a report of all the new members who registered using the “Find Your Nearest Scout Group” link on the Scouts WA website.

### 2.2 Workflow Notification

Use the Workflow Notification to gain easy access to up to the minute information on the following topics for your Group. Click on a topic heading to access the report.

#### Workflow Notification

- [Incorrect Contact Details To Be Updated](#)
- [Accounts To Be Paid](#)
- [WWC Admin](#)
- [Census 2011/2012](#)

#### 2.2.1 Incorrect Contact Details to Be Updated

Use this function to view a list of members in your Group whose contact details have been identified as incorrect.

##### *To access list:*

1. Click on the report name
2. Click the link showing the number of members with incorrect contact details.

##### *To update member details*

1. Click on the blue membership number 62797
2. Click the Edit button in the contact details section

**Home Address:**

**Postal Address:**


**Phone(H):**  
**Phone(W):**  
**Mobile:**  
**Fax:**  
**E-mail:**  
**External E-mail:** N

**Last Updated:** 2010-03-17

Member contact details are not correct.  
Please update with correct details

[\[Parental Details\]](#)

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3. Enter in the correct details
4. Click 

### 2.2.2 Accounts to Be Paid

Use this function to identify outstanding amounts owed to the WA Branch.

1. Click on the report name
2. Click the link showing the balance outstanding to get an itemised list of outstanding amounts

**Please Select The Item You Wish To Pay**

Item Details	Invoice No	Amount	Date
Training fee for (Register ID 149)	<a href="#">006946</a>	\$ 58.00	23 .
		Total Amount: \$ 58.00	

Click the invoice number to view details

### 2.2.3 WWC Admin

Use this function to identify Leaders and Adult Supporters who's WWC cards fall into the following categories. Click on the topic heading to access the report.

- WWC Applications awaiting for WWC card numbers
- Members with WWC expiring within three months
- Members with WWC expiring within one month
- Members with expired WWC

### 2.2.4 Census

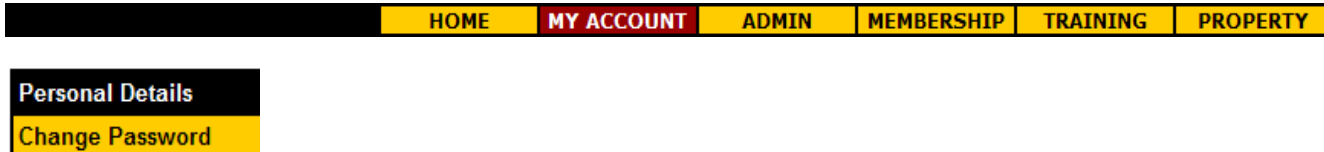
Use this function to assist with the management of your annual Census.

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## 3 My Account

### 3.1 Personal Details

Use this function to access and update your own personal details as recorded in Scoutrak.



#### ***To access your records:***

1. Go to My Account -> Personal Details

#### ***To update your details:***

1. Click
2. Update your current details in the form
3. Click

### 3.2 Change Password

Use this function to change the password you use for Scoutrak. For security reasons, Scoutrak will prompt you to change your password every 90 days.

#### ***Your new password:***

- Can not contain double quote ("), single quote (') or backslash (\)
- Must be at least eight (8) characters long
- Must include a combination of letters and numbers
- Can not contain your username

#### ***To change your password:***

1. Enter your current password in the top field
2. Enter your new password
3. Re-enter your new password
4. Click

*\*A confirmation is displayed if your password is successfully saved.*

#### 3.2.1 Changes to Membership Records

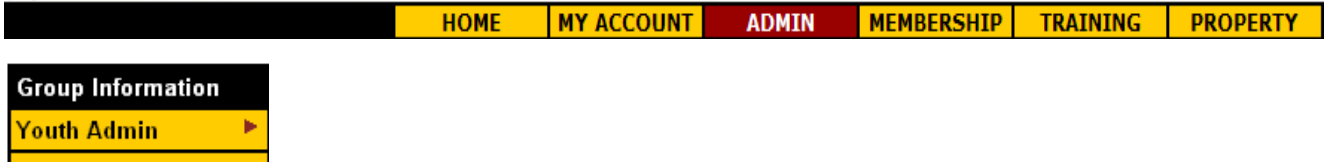
Use this function to view changes made to your Group's membership records. This report lists the registration id, or membership number, of the person who has made changes, the time and date changes were made, the registration number of the member who records were changed, what action was taken and any further comments.

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## 4 Admin

The Admin section provides the administrative support functions relative to the maintenance of your Group records.

### 4.1 Group Information




***The Group Information page provides the details of the:***

1. Group Leader or Leader In Charge
2. Breakdown of Youth, Leaders and Others in the Group.
3. Home Page (web page)
4. Group Fee, Group notes and direct banking details
5. Sections and Meeting Nights
6. Property and Asset details
7. Access to various finance and membership reports

*\*You cannot access another Group's reports or member listings*

#### ***To search Group details***

1. Use the down arrow  to display a list of all Groups in WA
2. Using your mouse, select a Group name by clicking on one of the names
3. Click  to display the selected Group's details

#### ***To edit your Group Information***

1. Click one of the [ADD/EDIT] options to update the topic and follow the prompts
2. Remember to click  or  to save the new information

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**To edit your Group's meeting nights:**

1. Click on the [Edit] button under the Meeting Nights section

Section	Comments	Day	Time	Last Updated
Cub Scouts	-	Saturday	14:00 - 17:00	21:15 26/08/2006
Joey Scouts	-	Saturday	13:00 - 14:00	13:40 27/03/2007
Rovers	-	Saturday	14:00 - 17:00	21:17 26/08/2006
Scouts	-	Friday	19:30 - 21:30	21:16 26/08/2006
Scouts	-	Saturday	13:30 - 17:00	21:14 26/08/2006
Venturers	-	Friday	19:30 - 21:30	17:39 13/11/2008
Venturers	-	Saturday	13:30 - 17:30	15:00 14/02/2007

[Edit]

- 1.1 **Delete** a meeting night by selecting the corresponding [DELETE].
- 1.2 **Add** a new meeting night by completing the details in the Add/Edit Meeting Night section and click
- 1.3 Remember to click  to save the your changes

At the bottom of the Group Information page, there are several reports designed to assist you in the management of your Group. Click the report name to access further information on each topic.

- [Group Statistic Report](#)
- [Group Gender and Age Report](#)
- [Group Training History](#)
- [Group Financial report](#)

## 4.2 Youth Admin

This section of Scoutrak is dedicated to the management of Youth member records.

***In this section you can:***

1. Register new Youth members
2. Link Youth members to another section
3. Transfer Youth members in and out of your Group and
4. Inactivate Youth members

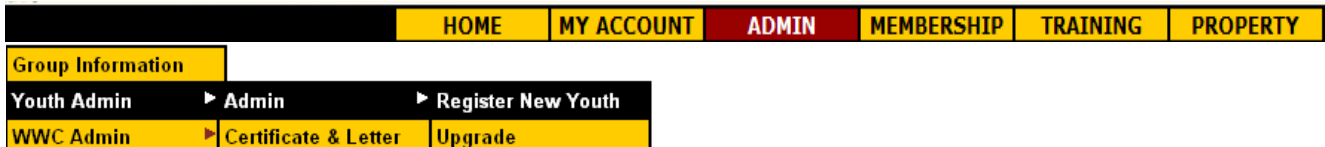
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## 4.2.1 Admin

### 4.2.1.1 Register New Youth

Use this function to register new Youth members onto Scoutrak. Before you commence registration, ensure the form is complete and signed.

1. Go to Admin -> Youth Admin -> Admin and click Register New Youth



2. Enter in the Surname and Date of Birth
3. Click on [Proceed New Youth Membership Application].
4. Fill in the details according to the M1 form.
  - 4.1 Use the [\[Click here to enter and verify address\]](#). This will ensure addresses are entered uniformly and, therefore, siblings are identified and charged correctly.
  - 4.2 Do not use all capitals for surnames as this will appear incorrectly on certificates.
  - 4.3 Use the date joined, not the investment date, for the Registration date.
  - 4.4 Select 'Yes' for "They have read and agree to the terms of the PRIVACY NOTICE above". This refers to the parental signature for the Privacy Policy, Indemnity and Medical Authority sections of the M1.
5. Tick the box
6. Click
7. A new window will open containing the invoice for the new Youth member. Note the membership number from the invoice on the top right hand corner of the M1.

### 4.2.1.2 Upgrade






Use this function to link Youth members to a new Section.

1. Go to Admin -> Youth Admin -> Admin -> Upgrade
2. Enter Membership number and click
3. Select the New Classification, new section, new class date (when the Youth member moved to the new Section) and change reason.
4. Click

#### 4.2.1.3 Transfer Between Groups

*Transferring a Youth member to a new Group is a two step process.*


Use this function to transfer a Youth member out of your Group:

1. Go to Admin -> Youth Admin -> Admin -> Transfer Between Groups
2. Enter Membership number and click 
3. Click the down arrow  to get a list of new Groups and select the appropriate one by clicking the Group name
4. Use the down arrow  to get a list of new Classifications (Section) and select the appropriate one
5. Use the  to select a Change reason and click 

#### 4.2.1.4 Transit Youth


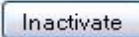
*Transferring a Youth member to a new Group is a two step process.*

Use this function to accept Youth members that have transferred from another Group.

1. Go to Admin -> Youth Admin -> Admin -> Transit Youth
2. To accept Youth members tick corresponding box on the far right column
3. Click  to complete the transfer of the selected Youth members

#### 4.2.1.5 Inactivate Youth

Use this function to inactivate Youth members who have left Scouts.

1. Go to Admin -> Youth Admin -> Admin -> Inactivate Youth
2. Enter the Membership number and click 
3. Enter the Inactivating Date as per the M2 form
4. Select Inactivating Reason and click 

### 4.2.2 Certificate & Letter


For WA Branch Office use only.

## 4.3 WWC Admin

### 4.3.1 WWC Report


Use this function to identify adult Members who do not have a valid Working with Children Check card recorded or those who have submitted an application number but do not yet have a WWC card number recorded.

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1. Go to Admin -> WWC Admin -> WWC Report
2. Select the classification required, or tick the 'Select all' box
3. Select the report type you wish to view using the tick boxes in Step 3
4. Click  to display the report.

#### 4.3.2 WWC Expiring Report

Use this function to identify adult Members who's Working with Children cards have expired or will expire in 1, 2, 3 or 4 months time.

1. Go to Admin -> WWC Admin -> WWC Expiring Report
2. Select the classification required or tick the 'Select all' box
3. Select the period of expiry and click 

## 4.4 Census Admin

This section offers all the information you require to manage your Group's annual Census process.

### **Pack**

Contains all the forms you will need to ensure all your Group records are up to date by March 31<sup>st</sup> each year. You will also find a list of important dates and the membership fees that will apply to the coming Scout year.

### **Group Census Listing and Invoice**

This area will provide you with a list of members in your Group, and the amount that will be owed for these members as at April 1<sup>st</sup>. This listing is a 'live' document and will update as you add and remove members. All updates must be made prior to April 1<sup>st</sup> each year.

### **Census Payment Follow up**

This option will provide you with a list of members whose annual membership fees are still outstanding.

## 4.5 Recruitment

### 4.5.1 Find Scout Group

Use this function to create membership enquiries in Scoutrak. This can assist you in managing your enquiries. This function is also available to the general public from the Scouts WA website.

#### **To lodge an enquiry:**

1. Go to Admin -> Recruitment -> Membership -> Enquiry -> Find Scout Group
2. Enter the date of birth of the potential Youth member, the address and, either, the post code or suburb and click
3. Click the [contact (your Group) Scout Group] button
4. Enter the remaining details and click  to send the enquiry by email to the relevant Group

### 4.5.2 Search Enquiry

Use this function to search for an enquiry by reference number, name or member/parent name.




1. Go to Admin -> Recruitment -> Membership Enquiry -> Search Enquiry
2. Enter details in the relevant fields and click
3. A new window will open containing results of the search

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## 4.5.3 Reports

### 4.5.3.1 Listing of Enquiries Report

Use this function to display a list of enquiries made to your Group, through the Find Your Nearest Scout Group function on the Scouts WA website. On this page you can view the prospective member's contact details and the current status of the enquiries.




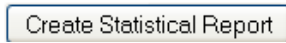
1. Go to Admin -> Recruitment -> Membership Enquiry -> Reports -> Listing of Enquiries Reports
2. Select a Section, or tick select all sections and click 
3. Select Status, or tick select all statuses and click 
4. Select Start Date and Duration (optional) and click 

\*Click the email address in the contact details to respond to the enquiry.


\*Click the Ref Number to access enquiry details.

### 4.5.3.2 Enquiries Statistical Report

Use the function to access statistical information on enquiries made to your Group through the Find Your Nearest Scout Group function.




1. Go to Admin -> Recruitment -> Membership Enquiry -> Reports -> Enquiries Statistical Report
2. Select Status and click 
3. Select options for Enquiry Submission Via and click 
4. Select Communication Media type and click 
5. Select Start Date and Duration (optional) and click 

Group	Pre-Joey	Joey's Mob	Cub Scout	Scout	Venturer	Rover	Les	
<a href="#">Pelican Point 1st Scout Group</a>	1	3	5	1	0	0		10
<b>Total Enquiries</b>	1	3	5	1	0	0	0	10

Click to view data 

### 4.5.3.3 Conversion Statistical Report

Use this function to determine how many new members register via a particular type of enquiry. E.g. By phone or by email.

1. Go to Admin -> Recruitment -> Membership Enquiry -> Reports -> Conversion Statistical Report
2. Select the type of enquiry and click 
3. Select the media type and click 
4. Enter the start and finish dates for your search and click 

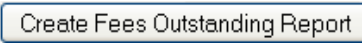
## 4.6 Service Desk Tickets


Used by the WA Branch Office only. If you have any issues, concerns or suggestions regarding Scoutrak, please contact the WA Branch Office Manager.

## 4.7 Financials

### 4.7.1 Fees Outstanding Report


Use this function to identify amounts outstanding to the WA Branch.

1. Go to Admin -> Financials -> Fees Outstanding Report
2. Select a payment category or tick the select all
3. Enter 'From' and 'Until' dates (optional) and click 

\*Click on the invoice number  to view the details of the invoice.

### 4.7.2 Fees Paid Report

Use this function to identify view amounts that have been paid to the WA Branch.

1. Go to Admin -> Financials -> Fees Paid Report
2. Select payment category or tick Select all
3. Enter from and until dates (optional)
4. Select the transaction type or tick select all
5. Enter dates from and until (optional) and click 

\*Click on the transaction number to view the details of individual transactions.

\*Remember - You can get a printer friendly PDF version of this report by clicking the  .Get PDF icon

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### 4.7.3 Refund Report

Use this function to view all refunds your Group has received from the WA Branch.

1. Go to Admin -> Financials -> Refund Report
2. Select the payment category or tick select all
3. Select the refund method or tick select all
4. Enter the from and until dates (optional) and click

Create Refund Report

*\*Click the Refund ID or refund amount for more detailed information on an individual refund.*

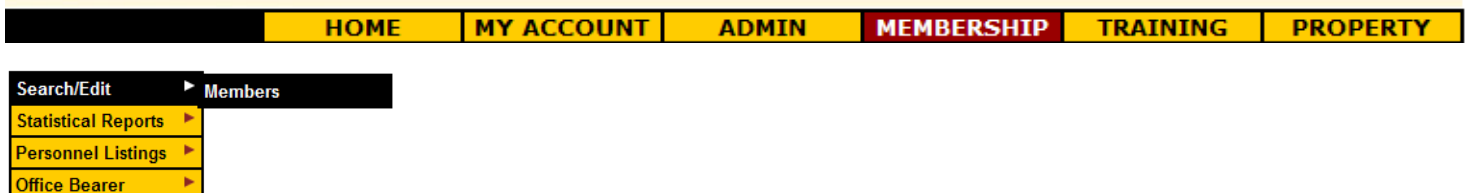
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## 5 Membership

This section provides information on your Groups membership. From this section you can update member's personal information and access a range of reporting options giving you a comprehensive understanding of the make up of your Group. This section also allows a free range of communication as each report allows you to email the members listed on the report.

### 5.1 Search/Edit

Use this function to search for or update a member's personal details.



#### To find a member's details:

1. Go to Membership -> Search/Edit -> Members
2. Type the Registration (membership) number or Surname or First Name.

*\* Names do not have to be entered in full if the 'Like' button is selected, but must be spelt correctly.*

3. Select the classification (optional)
4. Select member status (optional)
5. Select sort by (optional) and click

#### To edit contact details:

1. Find the member's details as per instructions above
2. Click on the number in the RegID column. This will open a page with the member's personal details
3. Click
4. Update the member's details and click

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## 5.2 Statistical Reports

This section offers a variety of reports giving you complete visibility of the makeup and history of your Groups membership.

### 5.2.1 Group Report

Use this function to display your Group statistics by Section and Adult Membership category.

1. Go to Membership -> Statistical Reports -> Group Report
2. Click

*\*Click the underlined total numbers to get a list of members in each category.*

### 5.2.2 New Member Report

Use this function to identify members who joined within a specified date range.

1. Go to Membership -> Statistical Reports -> New Member Report
2. Specify the registration date and duration of the reporting period
3. Select a classification
4. Click either  or

### 5.2.3 Inactive Member Report

Use this function to identify members who have been made inactive within a specified date range.

1. Go to Membership -> Statistical Reports -> Inactive Member Report
2. Specify the inactive date and duration of the reporting period
3. Specify the registration date and duration (optional) of the reporting period
4. Tick the box if you wish to include members inactivated at Census
5. Select classification
6. click either  or

### 5.2.4 Youth Transferred

Use this function to identify members who have transferred into or out of your Group.

1. Go to Membership -> Statistical Reports -> Youth Transferred
2. Specify the start date of the reporting period
3. Specify the duration of the reporting period and click

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### 5.2.5 Youth Upgraded

Use this report to identify Youth members, in your Group, who linked between Sections.

1. Go to Membership -> Statistical Reports -> Youth Upgraded
2. Specify the start date of the reporting period
3. Specify the duration of the reporting period
4. Select which report to be generated  or

### 5.2.6 Parental Photographic Approval Report

Use this function to identify Youth members in your Group whose parents or guardians have not given Scouts WA permission to use photographs of their child for promotional purposes.

1. Go to Membership -> Statistical Reports -> Parental Photographic Approval Report
2. Use the down arrow  to select Y (yes) or N (no)
3. Click on

### 5.2.7 Gender & Age

Use this report to identify the gender and age distributions of members in your Group. This report will enable you to identify Youth members in your Group who sit outside the age guidelines for the various sections.

1. Go to Membership -> Statistical Reports -> Gender & Age
2. Click on

*\*You can sort this information into a bar graph by clicking the [Get Graphic](#) icon*

## 5.3 Office Bearer Admin

### 5.3.1 Statistical Report

Use this function to identify the Office Bearers and Committee Members registered to your Group.

1. Go to Membership -> Office Bearer Admin -> Statistical Report

*\*Click the total numbers to get more information on the members in each category. From this area you can email, create mailing labels or get a PDF report of the members listed.*

### 5.3.2 Assign Position

Used by the WA Branch Office. To adhere to legal requirements only the WA Branch Office can register, inactivate and administer adult Members' records.

### 5.3.3 Remove Position

As above.

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### 5.3.4 Non Assigned Position Report

Use this function to identify vacant office bearer and committee member positions within your Group.

1. Go to Membership -> Office Bearer Admin -> Non Assigned Position Report
2. Select your Region, District and Group and click

### 5.3.5 Position History Report

Use this function to track the history of office bearers and committee members in your Group.

1. Go to Membership -> Office Bearer Admin -> Position History Report
2. Select Region and click
3. Select District and click
4. Select Group and click
5. Specify Group, Other or All
6. Select the Positions you want the report to display and click

*\*To select more than one position press the 'Ctrl' key on your keyboard and click each position*

7. Specify start date and end date (optional) and click

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## 6 Training

### 6.1 Training Reports



#### 6.1.1 Categories

Use this function to search the Categories of courses. It includes a code, description and also any pre-requisites for the course.

1. Go to Training -> Training Reports -> Categories

2. Enter a category name e.g. committee, leadership or section name and click

*\*Leave the category field blank to get a listing of all courses available*

#### 6.1.2 Training History

Use this function to obtain a history of the training undertaken by members of your Group.

1. Go to Training -> Training Reports -> Training History -> By Group

2. Click

#### 6.1.3 Workbook

Use this function to locate workbooks that have been issued to course participants.

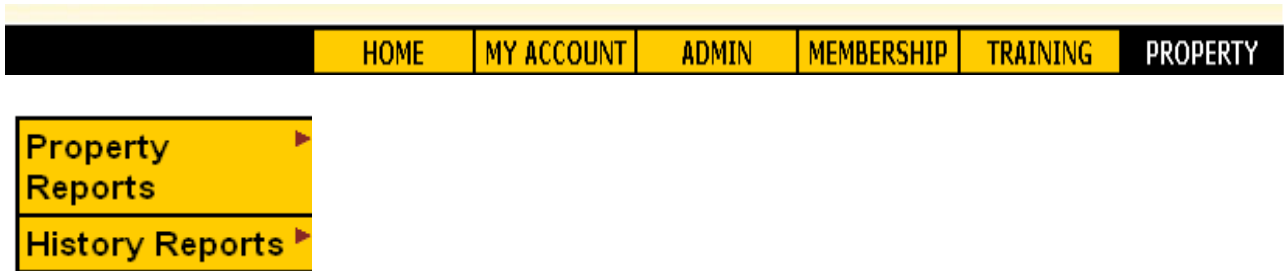
1. Go to Training -> Training Reports -> Workbook

2. Enter in details in any of the fields and click

*\*Click [Get Assessor ID] to search for the assessor details.*

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## 7 Property



### 7.1 Property Reports

Properties and Insurance details are contained under Property Report. Under Appendix list a number of different reports and how to create them.

### 7.2 History Reports

Historical information in regards to properties are contained under History Reports

## Appendix

### 7.3 How to Change Screen Resolution

Using the recommended screen resolution, 1024 x 768 pixels will eliminate the need to use horizontal scrolling, especially when viewing reports.

To change your screen resolution:

1. Right click on your desktop; the first screen displayed after your computer operating system has started
2. A drop down menu will appear. Click on "Properties"
3. A pop-up box will appear, click on the "Settings" tab
4. Adjust your screen area to 1024 x 768 by moving the slider across
5. Click on "Apply". A pop-up dialog box will appear click on "Yes"
6. The dialog box will disappear and your screen resolution will change. Click on "OK"

### 7.4 How to Create a PDF from a Scoutrak Report

A PDF is available for most reports. This is a printer friendly version of a report that can be saved. To create a PDF of your chosen report, click at the bottom left of the report.

PDF documents need a program called Adobe Acrobat Reader installed on your computer. You can download a free version of Adobe Acrobat Reader from [www.adobe.com](http://www.adobe.com)

To save a PDF:

1. Click 'Save a Copy' located at the top left of the screen.
2. Select the folder in which you wish to save the file and click

To print PDF:

1. Click on the printer button on the top left side of the screen.

### 7.5 How to Export Report to a CSV format

CSV is a simple text format table. By downloading a report to CSV format you can modify, sort or edit the information in the report to suit your needs in a similar way to Excel spreadsheets.

To export a report to CSV:

1. Click 'create CSV' located at the bottom left of the report page.
2. If you are prompted to open or save the document, select the option you need.

\*Due to the nature of CSV some actions may need to be completed twice.

### 7.6 How to Create Excel Documents

To create excel documents you will first need to save the page as a HTML document and open it in Microsoft Excel.

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To save the page:

1. Put your mouse over "File" then click on "Save As..." on the browser menu
2. Select where you wish to save the file to and click the "Save" button

To open the file in Microsoft Excel:

1. Open Microsoft Excel
2. Put your mouse over "File" then click on "Open..." on the browser menu
3. Select the saved HTML file and click on the "Open" button

## 7.7 How to Edit My Details

To View Your Details:

1. Click on MY ACCOUNT located on the main menu
2. Click on "Display My Details" located on the left side menu

To Change Your Contact Details:

1. Click "Edit My Details" located on the left side menu
2. Change your Home/Postal Address and other Contact Details
3. Click the "Save" button

## 7.8 To Change other details listed:

Please e-mail [it@vicscouts.asn.au](mailto:it@vicscouts.asn.au) stating:

1. Your Scout Registration ID (membership number)
2. Your Full Name
3. What details you would like to modify

## 7.9 How to View My Details

To View Your Details:

1. Click on MY ACCOUNT located on the main menu
2. Click on "Display My Details" located on the left side menu
3. Your details as recorded on the database will be displayed

See also Edit My Details

## 7.10 How to Register a New Youth Member

1. Click on the ADMIN link located on the main menu
2. Click on "Register New Youth" located on the left side menu

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3. An electronic version of the M1 form will appear
4. Type the information on the paper version of the M1 form given to you by the child's parent
5. Click the "Save" button

### **7.11 How to Transfer Youth from one Section/Group to another Section/Group**

1. Click on the ADMIN link located on the main menu
2. Click on 'Youth Admin' link located on the left side menu
3. Click on 'Transfer Between Groups'
4. Enter the Registration ID in the Youth Registration ID field or click on the "Search Youth Members" link to search for and select a youth member
5. The member's current details will be displayed. Ensure these are correct and enter the new change of details.
6. Click on the "Save" button

### **7.12 How to View Group Information**

Information can be obtained about a group such as, Group Contact, Number of members (youth/leaders), group property, etc.

To view group information;

1. Click on the ADMIN link located on the main menu bar
2. Click on "Group Information"
3. Search for the group by typing in the group name in the field and click on the "Search" button, or select the group from the drop down box.
4. Click the "Submit" button"
5. Information about the group will be displayed

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### 7.13 How to Edit Member Details

1. Click on the MEMBERSHIP link located on the main menu
2. Put your mouse over "Search/Edit" located on the left side menu
3. Click "Members"
4. Search for the Member whose details you wish to change
  1. Search for the Member by their Scout Registration ID, Surname, First name or Position
  2. Order your Search Results by selecting a "Sort By" option from the drop down box
  3. Click the "Search" button
5. A List of results matching your search will appear
6. Click on the "edit" button next to the Member whose details you wish to change
7. You will be redirected to the "Edit Member's Details" Page
8. Locate the information you wish to change and click the "edit" button in the same box
9. A new window will appear. Update the information and click the "Save" button
10. The "Edit Member's Details" page will be automatically refreshed and will contain the updated information

### 7.14 How to Obtain Statistics about the Scouting Population

Depending on your status in Scouting, you will be able to view Branch, Region, District and/or Group statistics

1. Click on the MEMBERSHIP link located on the main menu
2. Click on "Statistic Reports" link located on the left side menu
3. A list of reports available will be displayed.
4. Click on the link to the Report you wish to view to open a new window
5. Follow the instructions given and click the "Create Report" button
6. The report will be displayed. You may:
  - o Print the Report by clicking the "Get PDF" link and then click the Print Icon
  - o Break down the statistics further by clicking on the links displayed. Where numbers are links, member details will be displayed

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### 7.15 How to View Leaders / Create Labels for Leaders

1. Click on the MEMBERSHIP link located on the main menu
2. Click on "Personnel Listings" link located on the left side menu
3. A list of listings available will be displayed. Click on "Leaders Listing" which will open a new window
4. Follow the instructions given and click the "Create Report" button
5. The report will be displayed. You may:
  - o Print Labels by clicking the "Get Labels" link which will create labels in Adobe Acrobat format. To print, click on the Print Icon
  - o Click on the Leader's name for more details about the Leader.

### 7.16 How to View District Commissioners / Create Labels for District Commissioners

1. Click on the MEMBERSHIP link located on the main menu
2. Click on "Personnel Listings" link located on the left side menu
3. A list of listings available will be displayed. Click on "District Commissioners Listing" which will open a new window
4. The report will be displayed. You may:
  - o Print Labels by clicking the "Get Labels" link which will create labels in Adobe Acrobat format. To print, click on the Print Icon
  - o Click on the District Commissioner's name for more details about the District Commissioner.

### 7.17 How to View Group Contact Details / Create Labels for Group Contact

1. Click on the MEMBERSHIP link located on the main menu
2. Click on "Personnel Listings" link located on the left side menu
3. A list of listings available will be displayed. Click on "Group Contact Listing" which will open a new window
4. The report will be displayed. You may:
  - o Print Labels by clicking the "Get Labels" link which will create labels in Adobe Acrobat format. To print, click on the Print Icon
  - o Click on the Region Group Contact's name for more details about the Group Contact.

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## 7.18 How to View Group Leaders / Create Labels for Group Leaders

1. Click on the MEMBERSHIP link located on the main menu
2. Click on "Personnel Listings" link located on the left side menu
3. A list of listings available will be displayed. Click on "Group Leaders Listing" which will open a new window
4. Follow the instructions given and click the "Create Report" button
5. The report will be displayed. You may print Labels by clicking the "Get Labels" link which will create labels in Adobe Acrobat format. To print, click on the Print Icon

## 7.19 How to View Member Details

1. Click on the MEMBERSHIP link located on the main menu
2. Put your mouse over "Search/Edit" located on the left side menu
3. Click "Members"
4. Search for the Member whose details you wish to change
  1. Search for the Member by their Scout Registration ID, Surname, First name or Position
  2. Order your Search Results by selecting a "Sort By" option from the drop down box
3. Click the "Search" button
5. A List of results matching your search will appear
6. Click on the Registration ID of the Member whose details you wish to view

## 7.20 How to View Member Listing By Scout Role

1. Click on the MEMBERSHIP link located on the main menu
2. Click on "Personnel Listings" link located on the left side menu
3. A list of listings available will be displayed. Click on 'Listing by Position' which will open a new window
4. Select a Role and click the "Create Report" button
5. The report will be displayed. You may:
  - o Print Labels by clicking the "Get Labels" link which will create labels in Adobe Acrobat format. To print, click on the Print Icon
  - o Click on the Member's name for more details about the Member

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### 7.21 How to View Property Report By Region

1. Click on the PROPERTY link located on the main menu
2. Click the "Property Reports" link located on the left side menu
3. The "Property Reports" page will be displayed. Click "By Region" which will open a new window
4. Select the Region and click on the "Create Report" button
5. A list of Properties in the Region selected will be displayed

### 7.22 How to View Property Details



1. Click on the PROPERTY link located on the main menu
2. Click the "Search / Edit" link located on the left side menu
3. The "Search Property" page will be displayed.
4. Follow the instructions given, providing as much information about the Property as possible.
5. Click on the "Search" button
6. A list of Properties and their Details matching your search will be displayed

### 7.23 How to Create Labels


Use this function to generate mailing labels from the various reports you create.

\*Use Avery L7160 labels or equivalent (63.5mm x 38.1mm)

#### **To save labels:**

1. Click  Save a Copy icon on the top left of the screen
2. Select the folder you wish to save the label file to and click 

#### **To print labels:**

1. Click on  icon on the top left of the screen

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## 7.24 How to Send Email

Use this function to send an email to the members listed in a report. You can email members from any report that shows the Send Email to all Members Listed icon at the bottom left of your report.



[Send Email to all Members Listed](#)

1. Click on the link
2. Your default email will appear in the Email From field. You can change this if you wish.
3. Add Cc or Bcc if required
4. Enter the email subject
5. Add attachment (optional)
6. Write the email message in the box provided. Add addition information by using the 'tags' located on the right hand side of your email. Tags allow personalised information to be sent to each member listed. E.g. Use the [PreferredName] tag to insert the preferred name of the member as recorded in Scoutrak.
7. Click  to see your email as it will appear to the recipient.
8. Click

## 7.25 How to Create Custom Letter

Use this function to draft a letter in Scoutrak for ongoing use.



[Create Custom Mail](#)

1. Click
2. Click on the [View Help](#) link at the bottom of the page and follow the instructions provided

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