

How to Set Up Volunteer Communication Groups

The Just Between Friends system provides a great opportunity to enhance your volunteerism. Below we have set up a scenario of how you can solicit and automatically create communication groups.

1. Set up your volunteer chair as an admin:
 - a. You must be an administrator for your unit. If you are a Master or Alternate group admin you can set up your volunteer chair to have permissions in the system to manage their own group.
 - i. Make sure that the Volunteer Chair is an admin in the system.
See: Adding an administrator to Just Between Friends instructions at the end of this document.
2. Log into your Just Between Friends Admin account
3. Click on the <Groups & HH> tab.
4. Click on



5. Note the section below that says: Manage Groups
6. Next click on the red words: **Create New Group**

10. Answer the questions as follows on the page. Pay special attention to the Parent Group. For example if your unit is called Apple Elementary and you are creating a group for Mrs. Smith first grade, then your parent group would be 1st grade. Apple Elementary → First Grade → Mrs. Smith first grade. The parent group for Mrs. Smith's first grade is First Grade. **You should make your parent group for the volunteer effort the unit.**

The screenshot shows the 'ADD A GROUP' page on the Just Between Friends website. The page has a dark red header with the logo and navigation links. The main content area is white with a light green border. The form is titled 'ADD A GROUP' and includes the following sections:

- GROUP NAME:** A text input field containing 'Fruit Volunteer Effort'.
- GROUP TYPE:** A dropdown menu set to 'Activity Provider (Activity Group)'.
- PARENT GROUP:** A dropdown menu set to 'Apple Elementary (Attached to PTA 00054581)'.

At the bottom of the form, there are two buttons: 'Cancel' and 'Update Group'. The footer of the page contains copyright information for 2009.

11. Click on "Update Group button" or click on "Cancel button" if you would like to discontinue your action of adding a group.
12. Now repeat the process for each of your sub-groups but this time making the name of the overall volunteer group (our example Fruit Volunteer Effort) the

parent group:

This is the name associated with this group.

GROUP TYPE

This is the type associated with this group.

PARENT GROUP

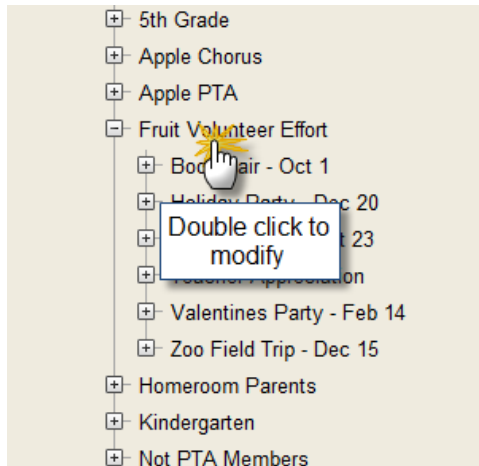
This is the group that will contain the group you are trying to make

ACTIVATE THIS GROUP

13. After you have completed adding your opportunities go back to the tab <Groups & HH> and click on [View / Modify Existing Groups](#)

The screenshot shows a web application interface with a dark red header containing a logo and the text "Your Private, Secure, Social Manager". Below the header is a navigation bar with tabs: "Welcome", "Groups & HH", "Notices", "Administrators", and "Run My PTA/OMDR Plus". The main content area is titled "GROUP MANAGEMENT" and contains a section "MANAGE GROUPS" with three links: "Create New Group", "View / Modify Existing Groups", and "Assign Members to Groups". A mouse cursor is pointing at the "View / Modify Existing Groups" link. Below this is a section "MANAGE DIRECTORY – HOUSEHOLDS AND MEMBERS" with a link "Bulk Member Approval".

14. Take a look at your structure and then double click on your overall volunteer group, such as this case: Fruit Volunteer Effort:



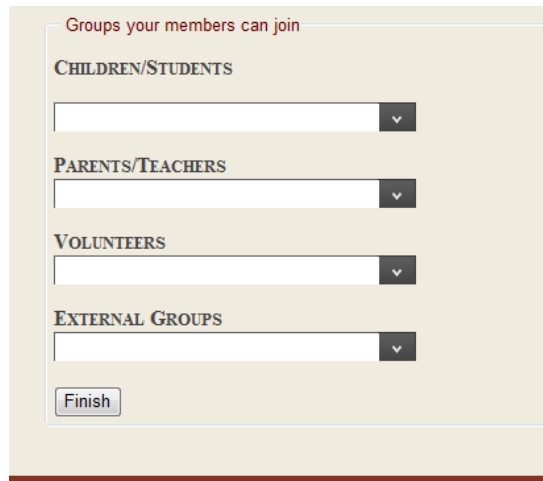
15. Scroll to the bottom and click on the red words **Add a Token**

16. Add the token (or invite) as you decide before. In our case: *Fruit Elementary Volunteer*

- Fill in the blanks the field of Token will be what you give the parents to join the various groups.
- The Start and end dates tell the system when people can no longer use the token.
- The number of uses tell the system how many times it is allowed to be used.

17. Click on the  button (or cancel to back out).

18. Here is the response screen:



Groups your members can join

CHILDREN/STUDENTS

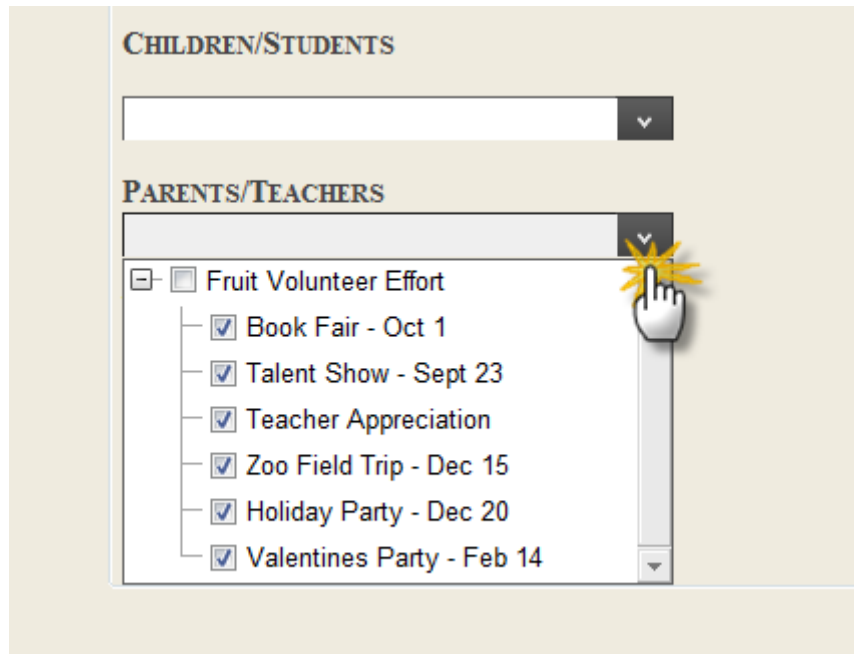
PARENTS/TEACHERS

VOLUNTEERS

EXTERNAL GROUPS

Finish

19. Now click on the dropdown arrow to the right of Parents/Teachers and **select all the specific groups under the volunteer effort not the overall group.** Please see below for example:

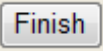


CHILDREN/STUDENTS

PARENTS/TEACHERS

- Fruit Volunteer Effort
 - Book Fair - Oct 1
 - Talent Show - Sept 23
 - Teacher Appreciation
 - Zoo Field Trip - Dec 15
 - Holiday Party - Dec 20
 - Valentines Party - Feb 14

a. **Note: if you later add more sub-groups you must edit the token here to reflect the need to include them in the parent's selection.**

20. Click on the  button.

27. After members join, you will have a communication list to work with. Click on the <Notices> tab and when you click to create a notice you should have the options to select your groups.
28. See sending notices instructions or take communications class.
29. Sample token distribution pages: See www.learnjbf.com Useful Documents Page (Ready August 2009)
After people have added themselves you must approve them into the groups:

To Approve a Unit Member Using Bulk Approval Function

Permissions Required: Administrative: Approve Households

1. Remember, whenever a member signs up for the system through the token process, an Administrator with the correct permissions must approve them.
2. Login to your Administrative side.
3. Click on the tab Groups and HH.
4. Under the heading: Manage Directory – Households and Members, click on the red link “**Bulk Member Approval**”.
5. The page return will give you the list of all potential members for your group which you have admin approval permissions for who are requesting entry.

BULK GROUP APPROVAL					
<input type="button" value="Select All"/>		<input type="button" value="Select None"/>			
APPROVED	LAST NAME	FIRST NAME	BIRTHDATE	GENDER	GROUP TO BE
<input type="checkbox"/>	Albers	Susan	Unknown	Unknown	BB, Lutheran
<input type="checkbox"/>	Albers	Jane	8/3/1988	Unknown	BB, Lutheran
<input type="checkbox"/>	Baker	Tyler	2/24/1985	Unknown	Lee's Summit
<input type="checkbox"/>	Baker	Logan	12/18/2008	Unknown	BB, Lutheran
<input type="checkbox"/>	Forsythe	Alyssa	Unknown	Unknown	BB, Lutheran
<input type="checkbox"/>	Goodrich	Ernie	3/2/1985	Unknown	Lee's Summit

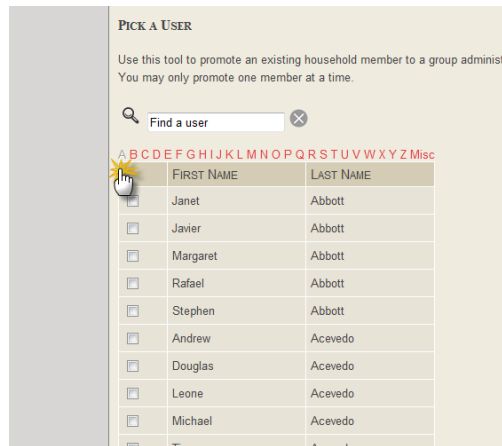
6. Place a check mark in the box to the left of the name of the person requesting approval if you wish to approve them.
7. You may also click on the "Select All" button which will, as it states, select all by placing a check mark beside everyone in the list. To deselect every line that has a check mark click on "Select None".
8. Once all are selected as desired; scroll to the bottom of the page and click on the button, "Approve All Checked".
9. If you decide to back out of this function click on the "Cancel" button.

You are done! Just start communicating.

Instructions for making admins:

Adding an administrator to Just Between Friends

1. You must have current permissions to set up new administrators in the system. Master and Alternate group admins have these privileges.
2. Log into your admin account.
3. Make sure the person you wish to add as an administrator is a member of Just Between Friends.
 - a. See Adding members instructions if required.
4. Click on the Administrator tab.
5. Click on the red words **Promote an existing user to an Administrator.**
6. Select the last letter of the member's name you wish to promote.



The screenshot shows a web interface titled "PICK A USER". Below the title is a search bar with the text "Find a user" and a magnifying glass icon. Below the search bar is a navigation bar with letters A through Z and "Misc". Below the navigation bar is a table with columns "FIRST NAME" and "LAST NAME". The table contains the following rows:

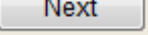
	FIRST NAME	LAST NAME
<input type="checkbox"/>	Janet	Abbott
<input type="checkbox"/>	Javier	Abbott
<input type="checkbox"/>	Margaret	Abbott
<input type="checkbox"/>	Rafael	Abbott
<input type="checkbox"/>	Stephen	Abbott
<input type="checkbox"/>	Andrew	Acevedo
<input type="checkbox"/>	Douglas	Acevedo
<input type="checkbox"/>	Leone	Acevedo
<input type="checkbox"/>	Michael	Acevedo
<input type="checkbox"/>	Tim	Acevedo

- a. If you do not see the person you may have the following scenario:
 - i. They have not been approved into your group.
 - ii. They may not have validated their email.
 - iii. They are not yet in the system.
7. Place a check mark beside the name of the person you wish to promote. You should see a screen similar to the following:

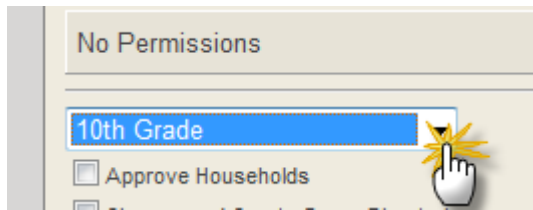


The screenshot shows the same "PICK A USER" interface as above, but with the checkbox next to "Javier" checked. The checkbox is highlighted in yellow.

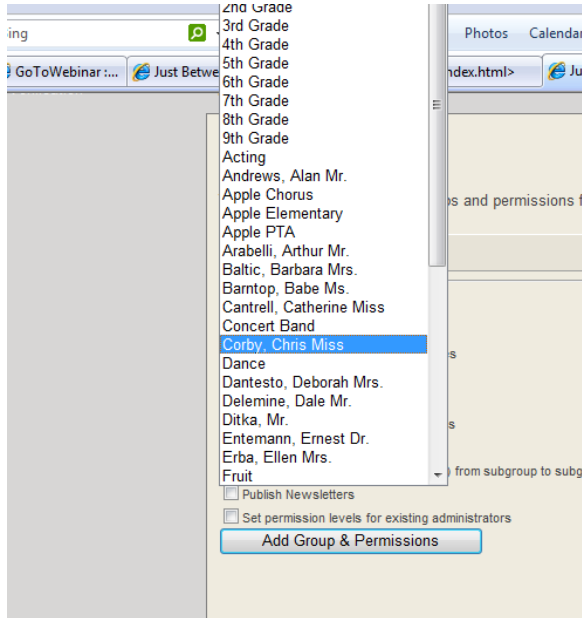
	FIRST NAME	LAST NAME
<input type="checkbox"/>	Janet	Abbott
<input checked="" type="checkbox"/>	Javier	Abbott
<input type="checkbox"/>	Margaret	Abbott
<input type="checkbox"/>	Rafael	Abbott
<input type="checkbox"/>	Stephen	Abbott
<input type="checkbox"/>	Andrew	Acevedo
<input type="checkbox"/>	Douglas	Acevedo

8. Scroll to the bottom of the page and click on the  button.

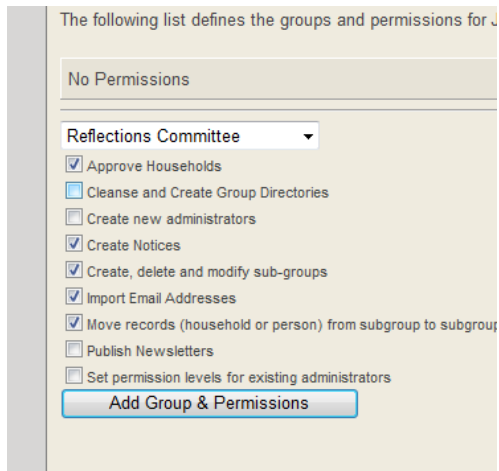
9. Click on the dropdown arrow.



10. You will get a view of all your groups you can choose from:



11. Here we are setting up the Reflections chair and have selected the appropriate permissions:



a. Here are a list of typical permission settings:

i. Volunteer Chair

- Approve Households
- Cleanse and Create Group Directories
- Create new administrators
- Create Notices
- Create, delete and modify sub-groups
- Import Email Addresses
- Move records (household or person) from subgroup to subgroup
- Publish Newsletters
- Set permission levels for existing administrators

ii. Homeroom Parent

- Approve Households
- Cleanse and Create Group Directories
- Create new administrators
- Create Notices
- Create, delete and modify sub-groups
- Import Email Addresses
- Move records (household or person) from subgroup to subgroup
- Publish Newsletters
- Set permission levels for existing administrators

iii. Membership Chair

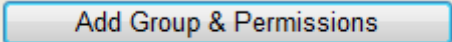
- Approve Households
- Cleanse and Create Group Directories
- Create new administrators
- Create Notices
- Create, delete and modify sub-groups
- Import Email Addresses
- Move records (household or person) from subgroup to subgroup
- Publish Newsletters
- Set permission levels for existing administrators

iv. Directory Chair

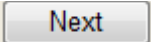
- Approve Households
- Cleanse and Create Group Directories
- Create new administrators
- Create Notices
- Create, delete and modify sub-groups
- Import Email Addresses
- Move records (household or person) from subgroup to subgroup
- Publish Newsletters
- Set permission levels for existing administrators

v. *Communications*

- Approve Households
- Cleanse and Create Group Directories
- Create new administrators
- Create Notices
- Create, delete and modify sub-groups
- Import Email Addresses
- Move records (household or person) from subgroup to subgroup
- Publish Newsletters
- Set permission levels for existing administrators

12. Now click on the  button.

- a. Please be sure you have set the right group or sub group for their permissions.

13. If no additional group permissions are needed Click on the  button.

14. You will then receive a page like the following:

Managing: Fruit (Attached to PTA 00054581) Contact Us | Our Household | Logout

justbetweenfriends™
Your Private, Secure, Social Manager Welcome Freddy FullAdmin

Welcome Groups & HH Notices Administrators Run My PTA/OMDR Plus JBF Help Switch to "HH" mode

CREATE A NEW ADMINISTRATOR

Create an Administrator

1. Pick a User
2. Groups and Permissions
3. Verification

Required fields are denoted by a *

VERIFICATION

Please verify the information below and click "Finish" to submit.

General Info

First & Last Name	Javier Abbott
Username	abbott
Email Address	jbttest+abbottfamily@gmail.com
Password	<input type="password"/>
Password	<input type="password"/>

[Change](#)

Permissions

GROUP & PERMISSIONS

REFLECTIONS COMMITTEE

Approve Households	<input type="checkbox"/>
Cleanse and Create Group Directories	<input type="checkbox"/>
Create new administrators	<input type="checkbox"/>
Create Notices	<input type="checkbox"/>
Create, delete and modify sub-groups	<input type="checkbox"/>
Import Email Addresses	<input type="checkbox"/>
Move records (household or person) from subgroup to subgroup	<input type="checkbox"/>
Publish Newsletters	<input type="checkbox"/>
Set permission levels for existing administrators	<input type="checkbox"/>

[Change](#)

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15. Add the appropriate password. Note that if the person exists in the system as an admin for some other group you will not be able to name a password. Please do not go in and change the password for the admin unless they request it.

16. Click on the  button.

17. Click on the Administrators tab and then the red words **Modify a Group Administrator** and see how your admin looks in the system (a double check)

18. Finally notify your new admin of their status and password, if appropriate and ask them to take a class for their appropriate position by visiting www.learnjbf.com

If your member is an officer also please add them as appropriate to the "Run My PTA Side".

