



# Online Reporting System Service Unit Manager's Manual

## Introduction

The Girl Scouts of Central Maryland Online Reporting System is designed to streamline the request and submission of a variety of required reports.

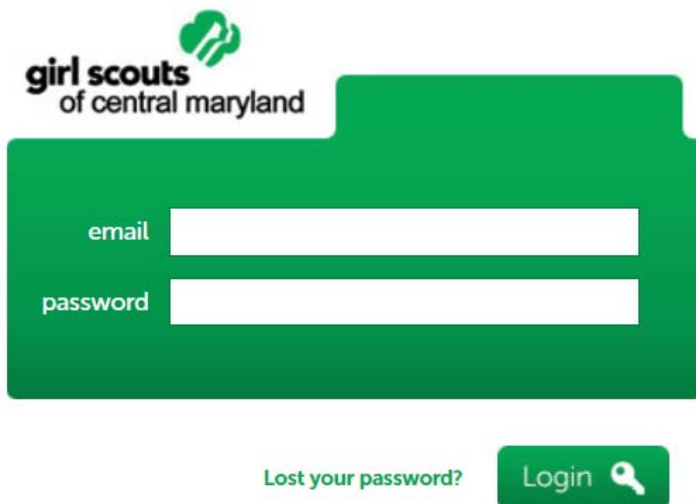
This manual was created for service unit managers, who are responsible for completing service unit reports and overseeing the completion of troop reports.

For assistance with this application, please contact your membership specialist or:

Yong Kim  
Chief Financial Officer  
Girl Scouts of Central Maryland  
410.358.9711 ext. 230  
[ykim@gscm.org](mailto:ykim@gscm.org)

## Login Screen

You will need to log in to access the application. You can access the login screen from any computer with an internet connection. Simply point your browser to [www.gscm.org/reporting](http://www.gscm.org/reporting).



## Returning Users

Returning users should enter their email address and password, then click **Login**.

## First Time Users

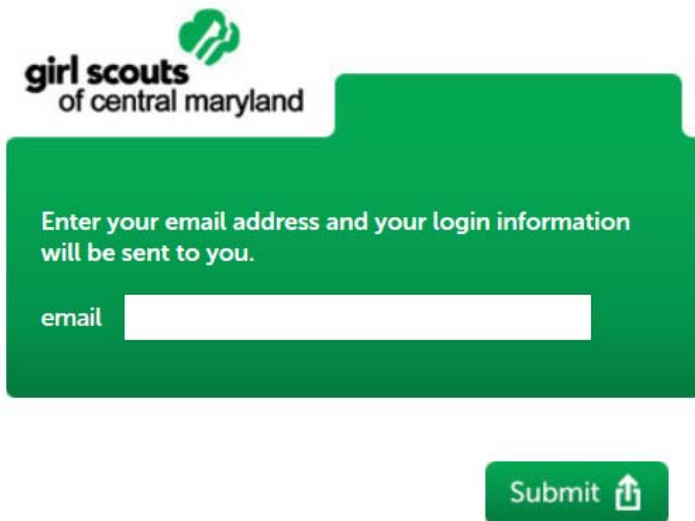
First time users should enter their email address and click [Login](#). (Leave the password field blank). The system will send you an automated email with instructions on how to set your password.



To access the system, you must use the email address GSCM has on file. If you need to update your email address in order to access the system or are unable to login for any reason, contact your membership specialist.

## Lost Password

If you forgot your password, click [Lost your password?](#) Then enter your email address. The system will send you an automated email with instructions on how to reset your password.



The screenshot shows a green form with the Girl Scouts of Central Maryland logo at the top left. The text inside the form reads: "Enter your email address and your login information will be sent to you." Below this text is a white input field labeled "email". At the bottom right of the form is a green "Submit" button with an upward-pointing arrow icon.

## Your Account

To change your account information, first log in, then click [change details](#) above the main menu. On this screen, you can modify your name, email and password.

## Logout

When you're finished with your session, please remember to logout by clicking **logout** above the main menu. This is particularly important if you are accessing the site via a shared or public computer.

## Reports

On login, Service Unit Managers are directed to the Reports screen. On this screen, you will see a list of all the reports that are currently configured in the system, as well as their status.

Click on the report name to access reports that have been assigned to you and to view reports that have been submitted by your service unit managers and troop leaders.

## Your Service Units/Your Troops

In this section, you will see a list of reports that have been assigned to you.

Click on the report to modify your responses.

Most report forms are divided into multiple pages. Each time you click the next or previous button, your responses are saved. All totals are automatically calculated for you.

Most fields are self explanatory. If you enter a value that is not in the correct format, the application will display a helpful instruction.

Some fields require that you upload a file from your computer. In this case, simply click the **Browse** button and locate the file on your computer. When you click the **Next** button, the file will be uploaded to the server.

You may quit the application at any time. All saved responses will still be there when you come back.

Once you've completed the report, you will have the opportunity to **Preview** your submission. From this screen, you may submit the report for review or return to the form to modify your responses. To submit the report for review, click the **Submit** button.

Once you submit your report for review, your membership specialist is automatically notified by email.

## Troops You Manage

In this section, you will see the status of reports that have been requested from your troops. Submissions have four possible statuses:

1. **New** – the respondent has been invited to complete the report, but has not yet opened the form.
2. **In Progress** – the respondent has opened the form and has begun work on the report.
3. **Submitted for Review** – the respondent has completed the form and submitted it for review.
4. **Approved** – the submission has been approved.

Click on the status to see the status of individual reports. In cases where submissions have been submitted for review or approved, you may click the link to review the report.

## Report Approval

**Troop reports** are intended to be reviewed and approved by the appropriate service unit manager. In the event that the troop leader submitting the report is also the service unit manager, the membership specialist is tasked with reviewing and approving the report.

**Service Unit reports** are intended to be reviewed and approved by the appropriate membership specialist. In the event that the service unit manager submitting the report is also the membership specialist, the report owner is tasked with reviewing and approving the report.

To approve a report, first view the report. Then check the box marked "I approve this report" in the **Approval** section and click submit.

The respondent is automatically notified by email when you approve a report.

If you approve a report by accident, please contact your membership specialist.

## Messages

If you have any questions or concerns about a report, you may send a message to the relevant troop leader, membership specialist, or report owner.

To send a message, first view the report, then complete the form in the **Send a Message** section. Message recipients are automatically notified by email that a message is waiting.

You may not send a message once a report has been approved.

## Troops

Service Unit Managers can view all troops in their service unit(s) by clicking on **Troops** in the main menu.

- Use the search form to find a troop by number
- Use the next and previous links to navigate search results
- Click on the troop name to view more details

## Troop Details

The troop details page includes:

### General Information

Click to edit the service unit number or program level.



Troop Leaders can be modified via the Users section.

### Bank Info

Banking information for this troop. Fields include bank name, branch, treasurer, routing number, account number, and signer information. Click on any field to modify. This information is used to populate reports where appropriate, and any updates made to bank info in a report are reflected here.

There is also a link in this section that will allow you to generate a bank authorization letter for the troop.

### Reports

A list of reports that have been requested from or submitted by the troop, with submission status. Once a report has been submitted, you may click to view.

## Service Units

Service Unit Managers can view their own service unit(s) by clicking on **Service Units** in the main menu.

- Use the search form to find a service unit by number
- Use the next and previous links to navigate search results
- Click on the service unit name to see more details

## Service Unit Details

The service unit details page includes:

### General Information

View the service unit number and service unit leader. This information cannot be changed.

### Bank Info

Banking information for this service unit. Fields include bank name, branch, routing number, account number, and signer information. Click on any field to modify. This information is used to populate reports where appropriate, and any updates made to bank info in a report are reflected here.

### Reports

A list of reports that have been requested from or submitted by the service unit leader, with submission status. Once a report has been submitted, you may click to view.

## Users

Service Unit Managers may add or modify users related to their own service unit(s) by clicking **Users** in the main menu.

- Use the search form to find a user by first or last name
- Use the next and previous links to navigate search results
- Click on the user's name to edit her account

## Add User



Each user should have her own account. You can assign multiple troops to a single user. The system will not allow you to add multiple users with the same email address.

The **Add User** screen allows you to specify a user's:

- Name

- Email Address
- Password

If you do not specify a password, the user will be prompted to create one on login.



The user's email address is also her login name for the system.

You may also assign the user as a troop leader.

To make the user inactive, uncheck the **Active** box. Inactive users do not receive notifications and are unable to log in.

## Edit User

The **Edit User** screen allows you to update the user's:

- Name
- Email Address
- Password



The user's email address is also her login name for the system.

You may also assign the user as a troop leader.

To make the user inactive, uncheck the **Active** box. Inactive users do not receive notifications and are unable to log in.

## Messages

Service Unit Managers may view and respond to messages by clicking **Messages** in the main menu.

Messages are presented in date order, with the most recent messages at the top. All messages are related to reports, therefore, you will need to view the report in order to reply. Just click **Reply to this message** to do so.



You may not reply to system messages or messages related to a report that has been approved.

## System Security

At GSCM, we take security very seriously. To prevent exposure, all data is encrypted for transmission using the same technologies used by U.S. banks. In addition, bank account and routing numbers are encrypted on the server.

It is your responsibility to keep your login information safe. Each user should have her own credentials. **Do not, under any circumstances, provide your password to a third party.**