

WHAT IS A GROUP LEADER? HOW DO THEY ACCESS?

Group Leader is a designation made to one (or more) members of a Group, allowing them limited access to ONLY the GROUP MODULE of the system. This access allows the Leader(s) to:

- View the list of group members
- Add or remove persons in the Group
- Email individuals or the entire Group

The URL for access to the module is: schedulesplus.com/karebears/groups

An authorized Group Leader signs in on a computer, tablet or phone with their email address and password.

Note: When a person is first assigned as a Group Leader, they will get an email with an initial password.

Note: This access will show ALL Groups for which the person is a Leader

The initial display will show one or more Groups at the left (here only one) for which the person is a Leader. The first is highlighted in yellow, with the list of members shown at the right (partial list shown here).

If there are multiple Groups shown, Click on the one desired for viewing.

LOG OUT		Change Password		PebbleCreek Kare Bears - Group Leader - Scott Pelletier			
Code	Group Name	Count	Has eMail	ALZHEIMR: Alzheimer/Dementia Support Group			
ALZHEIMR	Alzheimer/Dementia Support Group	60	60	<div> <div>ADD A PERSON</div> <div>EMAIL EVERYONE</div> <div>EXPORT</div> </div>			
				Name	Phone	eMail	
				1) Bass, Beverly	(602) 828-1269	ta22mob2@aol.com	EMAIL REMOVE
				2) Brooks, Wally	(623) 202-9999	wbrooks793@aol.com	EMAIL REMOVE
				3) Bunger, Barbara	(360) 460-6169	barbie.bunger@gmail.com	EMAIL REMOVE

A Leader can reset their password - CHANGE PASSWORD button. *If they also have system ADMIN access, there is only one password for that person for all signons*

A leader can send an email to the entire Group - EMAIL EVERYONE button, or to an individual - EMAIL button next to name.

- See the separate process document SENDING EMAIL for further instructions

The member list can be exported to an Excel file – EXPORT button.

- Note: Please remember that all information is privileged and NOT to be used outside of the Kare Bears organization.

A Leader can remove a person from the Group – REMOVE button next to name

- This DOES NOT remove the person from the overall system, only from membership in this Group

A Leader can ADD a member to the GROUP

- But ONLY if the person is already in the overall system PEOPLE file
- An Administrator must add that person to the system first, if needed

Click on
ADD A PERSON

SEARCH FOR A PERSON TO ADD

Search using part of first and part of last name or business

Begin to type all or a portion of the name

SEARCH FOR A PERSON TO ADD

Search using part of first and part of last name or business

	Name	Telephone	email
<input type="button" value="SELECT"/>	Ro Gotto	4144733429	rgetto16@gmail.com
<input type="button" value="SELECT"/>	Otto Rohleder	6235361590	alba2001@cox.net

Select the appropriate person. They are then added to the list of Group members

44)	Roberds, Gloria	(623) 536-1099	redsifter@aol.com	<input type="button" value="EMAIL"/>	<input type="button" value="REMOVE"/>
45)	Rohleder, Otto	(623) 536-1590	alba2001@cox.net	<input type="button" value="EMAIL"/>	<input type="button" value="REMOVE"/>
46)	Roland, Carol	(480) 729-0870	caprh13@aol.com	<input type="button" value="EMAIL"/>	<input type="button" value="REMOVE"/>

HOW DOES A PERSON BECOME A GROUP LEADER? (SYSTEM ADMIN FUNCTION)

A system Administrator must first access the GROUP in question, and “toggle” one (or more) members to be listed as LEAD.

Remove	Payne, Jillayne (Jill)	SAVE Info	husband	(623) 256-0039	Yes	5/29/24 2:23pm	Toggle
Remove	Peaper, Jim	SAVE Info	wife	(623) 670-4800	Yes	6/02/24 12:02pm	Toggle
Remove	Pelletier, Scott	SAVE Info		(623) 455-8076	Yes	6/02/24 12:02pm	LEAD Toggle
Remove	Pike, Cheryl	SAVE Info	husband	(602) 301-3292	Yes	5/29/24 2:19pm	Toggle
Remove	Pinto, Vanette	SAVE Info	husband	(623) 243-3992	Yes	5/29/24 2:19pm	Toggle

That Administrator then must access the person’s PEOPLE record, select the ADMIN ACCESS tab to:

- Set their GROUPS MODULE access to YES
- Set an initial password, which is emailed to the new Group Leader

UPDATE PASSWORD TO:

DRIVER MODULE / PROVIDER MODULE ACCESS --- If this person has NONE or READER overall for ACCOUNT ADMIN ...

1. If they are a DRIVER (in rides), you can authorize them to view/update their assigned rides using the DRIVER logon module.
2. If they are a PROVIDER (in services), you can authorize them to view/update their assigned service requests using the PROVIDER logon module.
3. If they are a GROUP LEAD (in groups), you can authorize them to view/update their assigned groups using the GROUPS logon module.

EDITOR/MANAGER account admins have access already by default

AUTHORIZE LOGON FOR: Driver Module: Provider Module: **GROUPS Module:** (See notes lower right)

Note: the person may already have higher ADMIN authority, but must additionally be granted access to the GROUP MODULE