

Arweinydd Cangen / Branch Leader - User Guide and Support Fsn S1.02

CYFIEITHIAD / TRANSLATION Fersiwn Gymraeg

http://www.urdd.org/aelodaeth/cyfarwyddiadau_gweinyddu_aelodaeth_cangen.pdf

Welcome to the Arweinydd Cangen / Branch Leader program.

Quick User Guide

(The latest version of this User Guide can be viewed by going to the 'Cymorth/Help' tab in the program. Remember to also read the short instructions on the system screens. Hovering the mouse over buttons and fields on the screen will also explain what many of them doS)

1. You will need your User Name and Password to use the system. These are the same as last year and can be found on the top of the membership leaflet you will have received by post in September. E.g.

User Name: urdd123 (=urdd + your branch number)

Password: ABC789 (= your branch password)

Please contact your development officer if you are unable to locate these.

2. 'Select Branch' screen - after logging in you will see a screen confirming your branch details. Press the '**Aelodaeth / Membership**' button to proceed to the next screen. (Please notify us by email if any of your branch details need amending).

3. 'Membership Forms List' screen - this screen shows a list of the membership forms you have created this year starting with the most recent. Press the '**New Form**' button to create a new form. Or you can '**Add**' to a previous form if you have not clicked on one of the payment buttons.

4. 'Add Members' screen - this screen shows the list of young people who were members in your branch last year. You will need to tick the members you wish to re-join. Go to the '**Select?**' column in the centre of the form and there will be a **yellow box** next to those available for you to select. **Tick the yellow box** to select the names to join. (Please ignore the box on the far left)

IMPORTANT: Please do not include family membership on your on-line forms. Parents can enrol families on-line by following the link at www.urdd.org/aelodaeth

The list is organised in the following order: year, school, class, surname, forename. Each different class will start in alphabetical order. Please bear this in mind when searching for a name.

Press the **PROCESS** button to save your selection. If there are a large number of members in your branch the information will appear on more than one page. You can change page by following the links at the top or bottom of the page. This will not lose your ticks (but you are welcome to press Process whenever you wish and return to the form to add more by using the 'Add' button.)

(If you use the search box to search for a name, do not use the full name, it will not work!. Search for any part of the surname OR forename. Also beware that using search will lose any unsaved ticks so press Process to save any selections before entering search and if selecting the name you searched for you will need to Process it before clearing or changing the search)

5. **'Not on list'**. It's important not to create duplicates by adding a name already on the list so please ensure that the person is not already on the list before adding. You can add names by clicking on the **'Not on list'** link at the **bottom of the page on the left**. This will add a new empty row **at the bottom of the list**. Enter the information including **name, surname, school year, boy or girl, welsh speaker or learner** (as defined in the Urdd Eisteddfod rules). If you wish you can also add a class so that lists and cards are sorted by class. **Save the new record by clicking on the blue square save icon on the left of the row**. Wait for the save to complete, the icon will change colour.

A red warning will appear next to any details entered incorrectly or missing. **You are not able to correct any mistakes after saving so please check before saving**. (Please Email aelodaeth@urdd.org noting the number of the form and details of the change if you need us to correct anything). The record just entered will appear at the bottom of the list, you can add more records if you wish.

6. Press the **'PROCESS' button to finish**. You will return to the list of forms. Your new form will be at the top of the list. You will be able to leave the program and return to add more members to the form or to proceed to pay through one of the following methods:

7. **PAY ON LINE** - Press the **'Pay On-Line'** button on the right of your form on the list. You will need to **enter your email address**. **Click on the blue square save icon to save** then press the **'Pay On-Line'** button. Then click on the **PayPal logo** to go to the PayPal website to pay using a bank card or PayPal account. PayPal will confirm your payment on screen and by email before returning you to the Urdd system which will also confirm on screen and send you an email to the address you entered. After closing the message and payment screen you will need to **refresh the list of forms by clicking on the circular refresh icon on the top**. The payment buttons will have gone and the **View** button turned green indicating that you can now view your new membership numbers.

8. **PAY BY CHEQUE** - Click on the **'Pay by Cheque'** button on the right of your form in the list. You will need to **enter your email** and **save by clicking on the blue square save icon**. Click on the **'Send EMail'** button which will email an invoice to the email address you entered. You will need to **print and post this invoice with your cheque**. Please note the invoice number on the back of the cheque. Your membership numbers will be visible on line shortly after we receive your cheque, the system will email you to let you know.

9. You can view members and membership numbers by pressing the **'View'** button on the relevant form. Or you can click the **'Search and View'** button to search and view all members in your branch. You can obtain a list in PDF format to print or save to your computer by clicking on the **'Membership List'** button at the top of the screen.

(You are also able to download a list in **Excel** format by clicking on the Excel icon on some screens)

10. Please click on **'Allgofnodi / Logout'** at the top of the screen to exit the system. If you have any problem operating the system or need support quickly please email the addresses below ensuring we have your name, email, phone number, details of the problem and form number if possible. The Urdd will continue to develop the system to resolve any problems and to improve the system.

For ADMINISTRATIVE assistance with the system or help with your membership please email aelodaethgweinyddol@urdd.org

For TECHNICAL assistance with the system please email aelodaethtechnegol@urdd.org