

How to create a formation event

Group or Section Leader



A formation event is typically held at the Group or Section level. Use this resource to assist in creating a formation event in ScoutMap.

Create Event in Formation Calendar

Follow these steps to create an event in the Formation Calendar:

1. Login to ScoutMap.

<https://scoutmap.my.site.com/scouts/s/login/>

(refer to guide 'How to log in to ScoutMap with Single Sign On')

2. Click the **Events and Calendar** option (may be under the **More** menu dropdown), then the **Group Calendar** tab,

A screenshot of the ScoutMap Group Calendar interface. It shows a header with tabs for Home, Tasks, Bookings, Book Now, Cases/Requests/Enquiries, Events and Calendar (which is underlined in blue), and More. Below the header is a navigation bar with Formation Events, Branch Events, Event Participants, Group Calendar (circled in red), Events Pending Approval, My Formation Events, and My Event Registrations. A message says "To view your additional calendars, go to 'Section and their Members' tab and navigate to each formation and the associated calendar." Below this is a list of sections, with "Canning Sea Cub Unit" circled in red. The main calendar area shows a date picker for "20 Oct 2024" and a time range from 9:30 AM to 1:00 PM. A red arrow points from the "Events and Calendar" tab in the header to the "Group Calendar" tab in the navigation bar.

A screenshot of the ScoutMap login interface. It shows a "Username" field, a "Password" field, and a "Log in" button. Below the buttons are links for "Forgot your password?", "Not a member?", and "Single Sign On". At the bottom, there is a link for "Are you an employee? Login here".

The formation calendar that appears is for your primary section. Click the 'Section and their Members' link to navigate to other available calendars.

3. Use the date pickers to select the desired event date (eg 20 Oct 2024).

A screenshot of the ScoutMap event date picker. It shows a date range from "20 Oct 2024" to "Sunday, October 20 2024". A red circle highlights the date "20 Oct 2024". A red arrow points from the date field in the list view to the date field in the picker.

4. Click-drag a time range for the event in the time field.

A screenshot of the ScoutMap event reservation details form. It shows fields for "Event Reservation Type" (with a red arrow pointing to it), "Start (local time)" (date: 20 Oct 2024, time: 9:30 am), "End (local time)" (date: 20 Oct 2024, time: 1:00 pm), and "Details". Under "Details", there are fields for "Type" (Event, circled in red), "Status" (Draft, circled in red), "Public Event" (checkbox), "Event Name" (Great Canning Bike Hike), "Location (Street)" (19 Centenary Ave), "Location (City)" (Wilson), "Location (State/Province)" (Western Australia), and "Location (Country/Territory)" (Australia). A red arrow points from the "Event" dropdown in the "Type" field to the "Event" dropdown in the "Status" field.

- a. Click the **Reservation Type** dropdown and select 'Event Reservation Type'.
- b. (if required) Adjust the **Start** and **End** dates and times.
- c. Click the **Type** dropdown and select 'Event'.
- d. Leave the **Status** as 'Draft'.
- e. Type in **Event Name** and **Location** details.

Account: Canning Sea Cub Unit

Registration Closing Date: 19 Oct 2024

Has Teams:

Includes Water Activities:

Event Fee Required:

Collect Event Fee Outside Registration:

GL Code:

Job Code:

Description: Bike hike then BBQ lunch

~~Participant Type~~

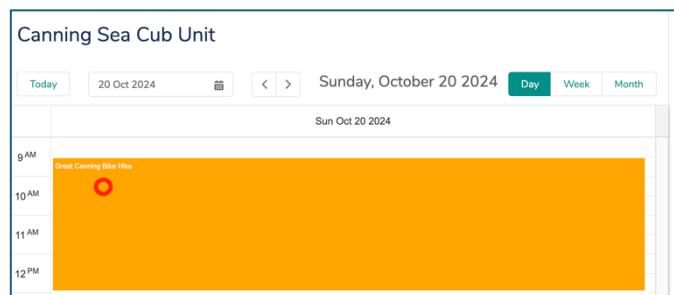
~~Payment Schedule~~

~~Event Payment Schedule~~

Cancel Save

- f. Pick a **Registration Closing Date**.
- g. Select one of the fee checkboxes:
 - i. **Event Fee Required** – payment of fees will be part of the event registration process. Fees paid within ScoutMap go into a branch account.
 - ii. **Free Event** – there are no fees for the event. Do not create a Payment Schedule.
 - iii. **Collect Event Fees Outside Registration** – Fees are collected external to the event registration process in ScoutMap. As a suggestion enter the event payment details into the Description field.
- h. Type in a **Description**.
- i. Click the **Save** button.

6. Reopen the event by clicking it in the formation calendar.



7. Click the **View in Salesforce** button.

Event Reservation Type

Validated

Start (local time) 20/10/2024, 09:30 am

End (local time) 20/10/2024, 01:00 pm

▼ Details

Type: Event

Status: Draft

Event Name: Great Canning Bike Hike

Location (Street):

Location (City):

View in Salesforce **Cancel** **Edit**

8. Select the **Related** tab for the event reservation.

Reservation R-001983

DETAILS **RELATED**

Files (0) **Add Files**

Upload Files Or drop files

Reservation Contacts (0) **New**

Participant Types (0) **New**

Event Payment Schedules (0) **New**

Event Team Members (0) **New**

Training Reservations (0) **New**

9. Repeat the following steps to add one or more **Participant Types**. You only need different participant types (eg Youth Members, Leaders) if there are different fee structures, LIC approval or team membership requirements:

- Click the **New** button in the **Participant Types** box.
- In the **New Participant Type** pop-up window:
 - Type in a **Participant Type Name** (eg Youth Member).

ii. Type in a **Fee** value.

New Participant Type

* = Required Information

Information

* Participant Type Name *

Owner

Maximum Participants

Available for Team

* Fee *

iii. Select eligible sections in the **Eligibility** picker (eg only Cubs Scouts).

iv. (if required) Type in a comma delimited list for **Option 1** (eg if this option is to be used for event branded shirts then type in shirt sizes 'S, M, L, XL'). Repeat for other two Options as required.

v. (if required) Select 'Is a payment schedule required' checkbox.

* Eligibility

Available

Leader ▶

Volunteer ◀ ▶

Non Member ◀

Chosen

Joey Scouts ▶

Cub Scouts

Scouts

Venturer Scouts

Rovers

Option 1 i

Option 2 i

Option 3 i

Is a payment schedule required

Endorsement Questions

Cancel Save & New Save

vi. Click the **Save** button.

10. Repeat the following steps to add **Event Payment Schedules** to the matching participant type (eg Youth Member):

- Click the **New** button in the **Event Payment Schedules** box.

b. In the **New Event Payment Schedule** pop-up window:

Reservation Number: R-001983

Owner: Ian Case

Fee: 1.00

Payment Due Date: 19/10/2024

Participant Type Name: Youth Member

Default payment:

Reservation: R-001983

Participant Types: Youth Member

Buttons: Cancel, Save & New, Save

- i. Type in the fee amount for this schedule.
- ii. Select a **Payment Due Date**.
- iii. Type in a **Participant Type Name** field.
- iv. (if required) Select the **Default Payment** checkbox.
- v. Select the **Participant Type** for this payment schedule.
- vi. Click the **Save** button.

11. Repeat the following steps to add **Event Team Members** who will be able to view event participants:

- a. Click the **New** button in the **Event Team Members** box.

b. In the **New Event Team Members** pop-up window:

New Event Team Member

* = Required Information

Information

* Name Cub Leader	Owner Ian
* Role Event Team	* Event R-
* Member Ian	IsActive <input type="checkbox"/>
* Access Level Create/Read/Write	

Cancel Save & New **Save**



- i. Type in a **Name** for this team member type.
- ii. Select a **Role** for the dropdown (eg Event Team).
- iii. Select a **Member** from the dropdown.
- iv. Select a **Access Level** from the dropdown (eg Create/Read/Write).
- v. Tick the **IsActive** checkbox.
- vi. Click the **Save** button.

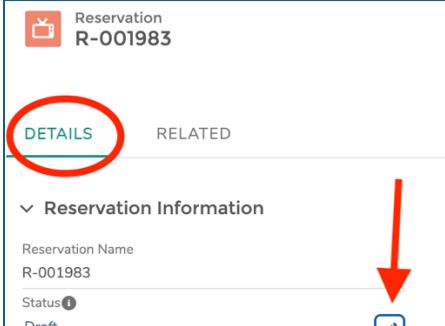
12. Select the **Details** tab for the event reservation. Change the **Status** to 'Pending Approval' by:

Reservation
R-001983

DETAILS RELATED

✓ Reservation Information

Reservation Name R-001983	Event Name Great Canning Bike Hike
Status Draft	Account Canning Sea Cub Unit
Logo	Has Teams <input type="checkbox"/>
Registration Closing Date 19/10/2024	Free Event <input type="checkbox"/>
Event Fee Required	More Info URL



- Click the pencil icon next to the **Status** field.
- Remove the 'Draft' status by clicking the 'x'.
- Search for next status by typing 'Pend'.
- Select 'Pending Approval'.
- Click the **Save** button (not shown in screenshot).

13. Ask the next level up (eg Group Leader, District Commissioner) to approve the event. (refer to guide '*How to approve an event*')

14. Click the **Events and Calendar** option (may be under the **More** menu dropdown), then the **Formation Events** tab.

Reserv...	Event Name	Acco...	Status	Local S...	Lo...	Local E...	Lo...	Registr...
1 R-001649	Joey Bounce	Account ...	Approved	24/6/2024	17:00	24/6/2024	18:00	20/6/2024
2 R-001892	AJ25 PreJam	Canning S...	Comple...	21/9/2024	09:30	23/9/2024	14:00	15/9/2024
3 R-001983	Great Canning Bike Hike	Canning S...	Approved	20/10/2024	09:30	20/10/2024	13:00	19/10/2024

15. Open the formation event by clicking on the link in the **Reservation Name** column.

16. Select the **Details** tab for the event reservation. Change the **Status** to 'Registrations Open' by:

- Click the pencil icon next to the **Status** field.
- Remove the 'Approved' status by clicking the 'x'.
- Search for next status by typing 'Reg'.
- Select 'Registrations Open'.
- Click the **Save** button (not shown in screenshot).

Next Steps:

- Monitor event registrations under Reservation Contacts using the **Related** tab for the event reservation.
- Set the Status to Completed after the event has concluded.