# 5

Manage My Team - Counters

5.1 Overview

The '**Counters**' section within Manage My Team is where you can see the details for all the counters who have 'INPUT' rights to at least one site/sector that you have LO (LOC_ORG) rights to. This page is only accessible for those who have completed their General Data Protection Regulation (GDPR) training so if you are unable to access the page, or you do not recognise someone on this list, (it is likely that they have been assigned to the wrong site), please contact the WeBS office.
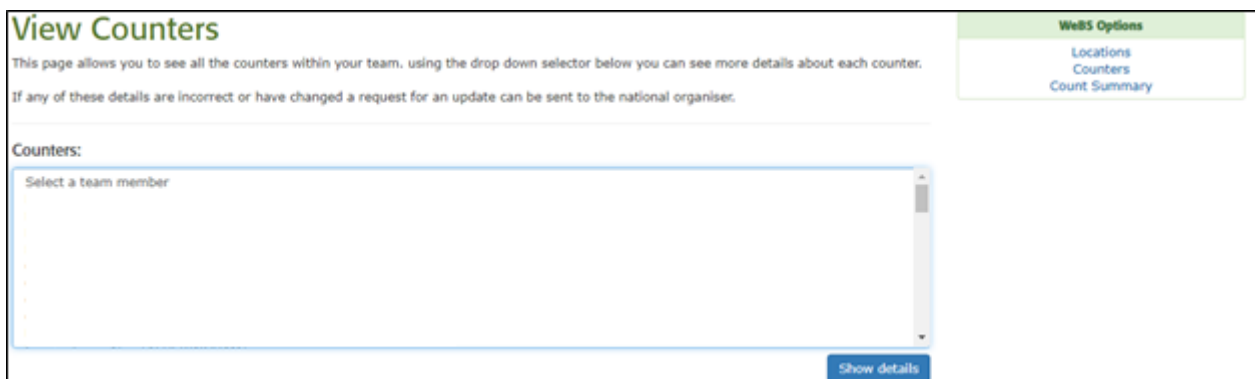
Figure 1 *The Counters section lists all counters in your region.*

As you can see in Figure 33, all the counters are organised alphabetically by surname.
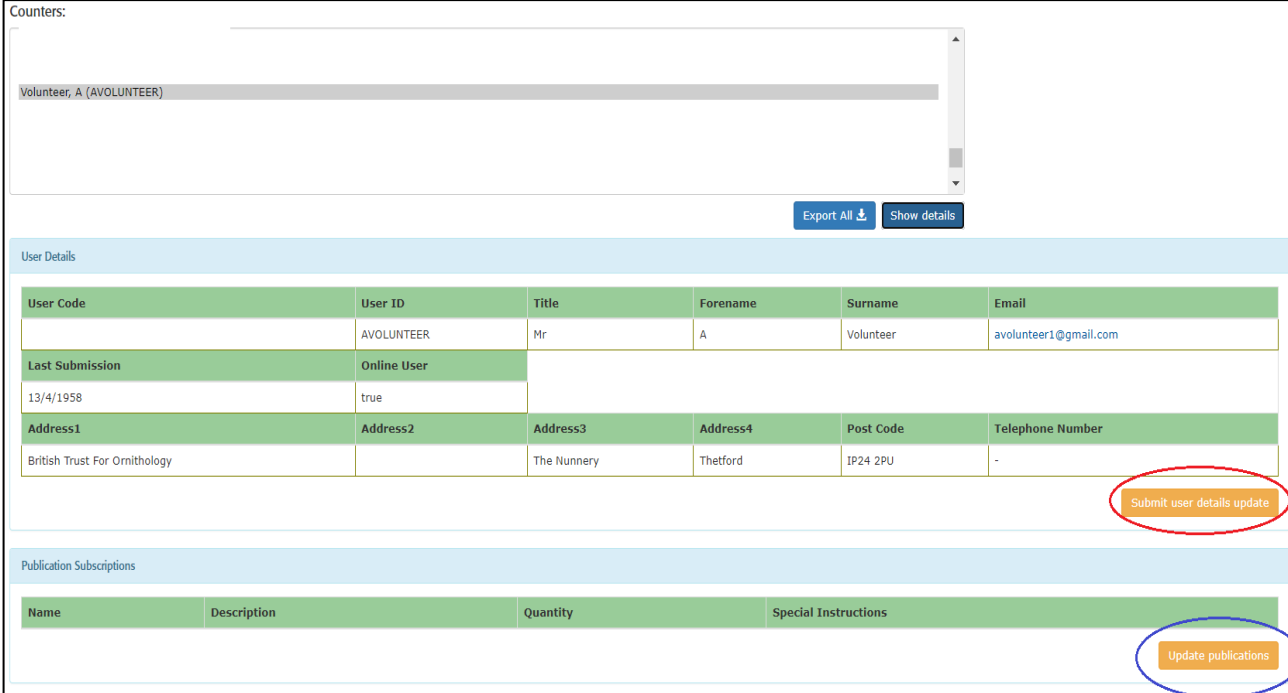
From here you can:

- **view and update the contact details for each counter** (see page 36);
- **view and update the number of Newsletters and Reports each counter should receive** (see page 36);
- **see which sites each counter has access to** (see page 40);
- **download a spreadsheet containing all this information** (see page 40).

5.2 View and Update Counter Contact Details

From the WeBS Data Home Page you will need to select the '**Manage My Team**' option and then the '**Counters**' option to find the list of counters in your region.

Select a name from the list and click on the blue '**Show Details**' button, their contact details will appear below the counters box (see Fig. 34).

Figure 2 *Counter contact and publication details.*

The **User Details** section shows you the counter's contact details as well as:

- **User ID** or online username - this is used when assigning sites; you will need to quote this ID when contacting the WeBS Office about this counter. The counter will also need this (and a password) to log into WeBS Online;
- **User Code** or Counter Code – this is an old-style reference mainly used by long-term counters who submit data on paper forms. All counters are still given a counter code but, as it is only used for administration purposes, most counters will be unaware that this exists. Counters do not need to know this code in order to use WeBS Online;
- **Last Submission** – this is the date of the count they last submitted online. If they have access to several sites the data submitted may not necessarily be for a site in your region;
- **Online User** – this is a very useful piece of information. Only counters who have registered for WeBS and have input rights to a site in your region will appear in this list. However, this does NOT mean that they have activated their access. If **Online User = False** this means they have not activated their access and will not be able to log into WeBS online (see **Appendix 6** Troubleshooting). Only counters with **Online User = True** have activated their online access and will be able to log into WeBS Online.

To update a counter's contact details click on "**Submit user details update**" (circled in red in Fig. 34). This will open an '**Update Counter Details**' form (see Fig. 35).

Figure 3 *Update Counter Details form.*

Amend the existing details in the various boxes with the new counter details as required. If you would like a copy of the notification to be sent to you please tick the 'email copy of request to self' box. Click on the blue '**Submit Update**' button to send a notification email to the WeBS Office.

The WeBS team will update the (offline) BTO supporter database and will confirm when this has been done. After which the details shown online will be automatically updated overnight.

5.3 View and Update Publications Subscriptions

From the WeBS Data Home Page you will need to select the '**Manage My Team**' option and then the '**Counters**' option to find the list of counters in your region.

Select a name from the list and click on the blue '**Show Details**' button, you will see the number of WeBS Newsletters and Reports they are due to receive listed below their contact details (see Fig. 34). This section also shows any special instructions or notes about this counter.

Every WeBS Counter must be given the option to receive a copy of the WeBS Annual Report and Newsletter. At the time of writing this, counters can only be added to the mailing lists by LOs or the WeBS Office. However, the BTO is in the process of introducing a new system which will allow WeBS volunteers to add/remove themselves to/from the mailing lists. We will let you know when this process has been completed and send updated instructions.

To add or amend the number of each publication a counter should receive, click on the "update publications" button (circled in blue in Fig. 34). This will open an '**Update Counter Details**' form (see Fig. 36).

Update Counter Details

The form below allows you to make changes to which publications and the quantities that **AVOLUNTEER** should receive.

WeBS Report

☑ Subscribed

Quantity: `0`

Special instructions: `BTO staff`

WeBS Newsletter

☑ Subscribed

Quantity: `0`

Special instructions: `BTO staff`

[Submit Update]

Figure 4 Update the number of WeBS publications the counter should receive.

Ticking the '**Subscribed**' boxes will ensure the counter is added to the mailing list, however, you will still need to enter a **quantity** otherwise the counter will not receive a publication. You can add/edit/remove **special instructions** as required (also see page 39).

If you prefer to receive and distribute the Reports and/or Newsletters to your counters, or if they have opted out of receiving printed copies please still tick the 'Subscribed' box but set the quantity to zero, then simply add a note to explain in the Special Instructions box (see below). Both publications are available to download from the website (**www.bto.org/webs-publications**).

When a counter leaves the scheme, you can remove their subscription by unchecking the '**Subscribed**' boxes. Unsubscribing a counter will remove any special instructions. If you would like to keep the special instructions please ensure the counter is still subscribed, simply change the quantity to zero as in the example show in Figure 36.

Once you are happy with the changes click on the blue '**Submit Update**' button to save your changes.

5.3.1 Special Instructions

The special instructions box should be used to explain why a counter is due to receive more or less than one copy of a publication or to indicate that a counter has recently retired but should receive a copy of the next Report or Newsletter.

Here are some examples of instructions used by the WeBS Office to explain why a counter is due to receive more than one copy:

- LO to receive all pubs
- Has a team of counters
- Needs extra copy for landowner

Here are some examples of other instructions used by the WeBS Office:

- Opted out
- Will receive pubs from LO
- RET* send 2015/16 & 2016/17 Report
- RET Long-standing counter continue to send pubs**
- BTO Staff no need to send separate pubs
- Partner to USERNAME send one pub between them
- Additional counter***

Any instructions you add will only be visible to WeBS Staff and will be used solely for creating the Report and Newsletter mailing lists.

*RET = retired. Counters will be unsubscribed once they have been sent the specified Reports.
**Only applies to retired volunteers who have been counting for WeBS continuously for 10+ years.
***Helps to explain why a counter should receive a publication when they have not made any data submissions.

5.4 Viewing a Counter's sites

From the WeBS Data Home Page you select the '**Manage My Team**' option and then the '**Counters**' option to find the list of counters with input rights to at least one site/sector in your region.

Select a name from the list and click on the blue '**Show Details**' button, you will see the counter's contact details and their publication subscription details. If you scroll down the page you will be shown a list of sites the counter has access to (see Fig. 37).

Site No.	Name	Grid	Region	Permission
57125	Belmont Reservoir	SD670170	Lancashire - East and Fylde	Input rights
57151	Black Moss Reservoirs	SD824411	Lancashire - East and Fylde	Input rights
53415	Blackhall Rocks to Castle Eden Dene mouth (Dur 2a)	NZ465399	Durham	Input rights
53411	Blackhall Rocks to Foxholes (Dur 2)	NZ459412	Durham	Input rights
54310	Boldon Flats (Dur 14)	NZ378614	Durham	Input rights
54428	Camel Island to South Pier South Shields (Dur 11)	NZ386672	Durham	Input rights
54430	Camel Island to Trow Pt (Dur 11a)	NZ390664	Durham	Input rights
53416	Castle Eden Dene mouth to Foxholes (Dur 2b)	NZ449421	Durham	Input rights
53413	Chourdon Point to Seaham (Dur 4)	NZ438479	Durham	Input rights
57154	Churnclough Reservoir Sabden	SD784383	Lancashire - East and Fylde	Input rights
54452	Durham Coast - Sector 15	NZ355668	Durham	Input rights

Users Sites

Figure 5 *List of sites a counter has access to.*

The list includes all sites they have access to regardless of whether that site is in your region or not.

You can see that the list of sites includes the site/sector code; the site name; central grid reference; which general region the site falls into; and what permission the counter has for that site.

If you need to change the counter's permissions to a site that you have LO rights to, then clicking on the site code will take you to the Locations section and will automatically open the details for that site (you may need to scroll down the page to find it). This allows you to adjust the counter's permissions for that site if required (see pages 21 to 25).

It is worth noting that when clicking on the site code of a site that is outside of your region, you will still be taken to the Locations section but all site details will be closed.

5.5 Downloading Counter Information

From the WeBS Data Home Page, select the '**Manage My Team** option and then the '**Counters**' option and you will see the '**Export All**' button. From here, you can choose to export all counter's details (or if you manage multiple regions, just those from one region) into a secure spreadsheet. Once you've selected the correct region (if necessary), entered your passwords, select '**Prepare File**' (see Fig. 38). This will then process and the '**Prepare File**' button will be replaced with '**File prepared, click to download**'. Select this and the spreadsheet will appear at the bottom of the window.

For data protection reasons, you are asked to specify a password which will be needed to then open the downloaded file. This can be the same as your usual BTO password, or something different that fulfils the criteria.

The download file includes contact details, a summary of the user's sites and their report and newsletter preferences. The file is an .xlsx file which should open in Microsoft Excel or alternatives such as Libre Office, once you enter the password you just created.

Figure 68 *Exporting Counter details*