

## **1. How a Member of Key 3 gives Unit leaders admin access to Dens and Patrols and/or Unit admin access.**

Scoutbook recommends having at least 3 users set up as Unit Admins. If your unit only has one admin it would be wise to add at least another trusted adult as a second admin.

To grant the Admin role to an existing adult in your Roster, an admin must click on their name from the roster to go to their adult account page.

A list of positions and roles will appear for the user. You can add the Admin role by clicking the Add Position button and select Admin role.

If you have a den or patrol subscription you can add the Den Admin or Patrol admin role.

## **2. How to change Unit Administrators**

To remove the Admin role to an existing adult in your roster, just click on their name to go to their adult account page.

A list of positions and roles will appear for the user. You can put an expiration date on the admin role, which will remove the permissions from the adult on the date of expiration.

## **3. Acquiring a Scoutbook Login for the Scout.**

Scouts can gain access to Scoutbook to review their advancements and view the unit calendar when they are 10 years old. To do so, they need a my.scouting.org account. You can create one for them by following the instructions below. Before you do so, make sure to get their Member ID from your unit leader. You will need that for the process.

Go to my.scouting.org and be prompted to log in or create an account if you do not have an account.

<https://help.scoutbook.scouting.org/wp-content/uploads/2019/04/Myst-Account-Setup-1.pdf>

Once they have an account, they can login into Scoutbook.scouting.org with their My.Scouting credentials and look at their advancement.

## **4. Permissions in Scoutbook**

[Granting Roles and Permissions in Scoutbook \(SB\) - Scoutbook Knowledge Base](#)

## **5. List of positions and the permissions they have. For example, who can edit the calendar.**

[Granting Roles and Permissions in Scoutbook \(SB\) - Scoutbook Knowledge Base](#)

## **6. How to guide volunteers on inviting their children to connect with Scoutbook.**

[How Do I Give My Scout Access to Their Account? - Scoutbook Knowledge Base](#)

## **7. Inviting parents to Scoutbook**

[Setting up Parent Accounts - Scoutbook Knowledge Base](#)

## **8. How to add someone and not duplicate the person.**

Please refer to question #3. My.Scouting should return all possible duplicates.

## **9. How to give a leader access (keys).**

Keys represent admin position. Please refer to question #1 in this document.

## **10. How to connect District Advancement Chairs with Merit Badge Counselor Access in Scoutbook.**

If advancement chairs would like to add badges to counselors, they will need to become a council administrator in Scoutbook.

[Adding More than One Council Scoutbook Administrator - Scoutbook Knowledge Base](#)

If they are looking to just download reports, they should go to My.Scouting [Merit Badge Counselor List for Councils and Districts \(myscouting\) - Scoutbook Knowledge Base](#)

## **11. Job aid to add/find a merit badge counselor.**

[Scoutbook Merit Badge Counselor Guide \(SB\) - Scoutbook Knowledge Base](#)

## **12. Basics of how to enter advancements for Units that still turn in Advancement reports or don't use Scoutbook.**

Registrar will need to search for unit under "Org Search." After selecting unit, Registrar will need to click the youth roster tab. When hovering over youth, Registrar will need to click the "Quick Edit" link and then "Edit Full Profile." Registrar will then need to click the "Advancement and Training" tab where they can add the advancement items

## **13. How to pull advancement reports.**

Registrar can go to my.scouting.org and click Reports from left side menu. Advancement reports can be found in Organization Manager Tool Reports

For unit reports, Registrars can go to <https://advancements.scouting.org>. They can search for a unit. Once they have found their unit and clicked on the unit. They can click the left side menu “Reports” and click under the tab “Unit XXXX – Reports.”

#### **14. How to pull activity reports.**

For council reports, Registrars can go to <https://advancements.scouting.org>. They can click the left side menu “Reports” and click the following reports under Council Reports tab.

Activities Summary Report (includes Service Projects)

Initiative Activities Summary Report

Most Recent Activities Summary Report

#### **15. Walking leaders through the Needs Approving and Needs purchasing report**

Needs Approving and Needs Purchasing is moving to Scoutbook Plus before the end of May. (Right now, it is only available for Beta units) Registrars (after searching and selecting a unit) and unit leaders can click the “Advancements” tab in Scoutbook Plus. There they will find the following tabs.

To Record < To Approve < To Purchase < To Award < Awarded < History

A help document is being developed, but the new flow is intuitive.

#### **16. Explain why the system keeps giving the error that someone is not in our council, when they have our council number in the query screen. What is the work around when that happens?**

I need images and MID to understand what is occurring.

#### **17. How to create a ‘Sandbox Unit’ to walk through issues with volunteers.**

##### **[Scoutbook Demo Environment - Scoutbook Knowledge Base](#)**

Scoutbook Plus will not have a sandbox environment as Registrars will have access to view units as units see them. They just need to search for the unit after logging into <https://advancements.scouting.org>.

#### **18. How to create a den/patrol and how to change them over each year (cub ranks).**

##### **[Introduction to Scoutbook Plus for Cub Scout Packs - Scoutbook Knowledge Base](#)**

#### **19. How to pull the Eagle Application filled out for a member.**

##### **[Eagle Scout Rank Application from Scoutbook \(SB\) - Scoutbook Knowledge Base](#)**

**20. Screen shots of what the volunteers see. Registrars don't know what the volunteer side looks like but they are tasked with helping the volunteer with Scoutbook.**

This is a pretty broad question. The best answer that I can provide is to go to [Scoutbook Knowledge Base - Boy Scouts of America](#) for specific questions and screenshots.

Also, please note that Registrars will have access to view units as units see them in Scoutbook Plus. They just need to search for the unit after logging into <https://advancements.scouting.org>.

**21. How to sync the advancements/trainings from My.Scouting to Scoutbook when they don't match. Or vice a versa...**

They should be pulling from the same database. I need a case where they do not match to see what the issue is and diagnose specifically.

**22. How can Councils give permission to Unit Scoutbook accounts or deleting permissions.**

Councils cannot give permission to Unit Scoutbook accounts. They must submit a ticket to Member Care.

When full migration to Scoutbook Plus is complete, Registrars will be able to help assign permissions in Scoutbook Plus in consultation with units. In addition, positions will be synced between My.Scouting and Scoutbook Plus.

**23. How to delete old Scoutbook accounts not linked to a registration.**

Registrars are unable to delete old Scoutbook accounts. They need to have the unit expire their positions in Scoutbook or submit a ticket through Member Care.

**24. Adjusting end dates for members when they are expired in Scoutbook in error.**

Registrar will need to submit a ticket to Member Care.

**25. The process for advancements from entering completion/approval to generating Purchase order then next step approval/awarded to become part of the advancement report.**

Please see answer to question #15.

**26. Mobile App functionality vs Desktop (what works, what doesn't, how to make it work better)**

Mobile App functionality is specifically designed for parents and youth. In the app, they can track their advancement, submit completion of requirements, edit their profile, submit activities (service, camping, hiking) for leader approval, view payment logs (i.e. their scout account balances if the unit uses the payment log feature of Scoutbook), and view calendar events that they are invited to.

All leader functionality is reserved for the desktop application (approving advancement, creating calendar events, adding payment logs, and running reports)

**27. How to correct the situation of memberships partly in one Council and partly in another. They end up with my.scouting.org and Scoutbook records out of sync and we can't do anything to update them because they are marked as Out of Council.**

We will be adding the VST tool in MyTools2 for local councils and training will be available to councils in the coming month.

**28. How to correctly choose which Scoutbook records to merge when there are several for the same person. What to look for to ensure we keep the correct record.**

This a big question. We will have some helps as we are migrating the ability to support merges in VST. Stay tuned.

**29. How to help people who have got Google or Apple sign-in (instead of BSA credentials) for their my.scouting.org/Scoutbook account and we can't do anything to reset their password.**

Will need to create a ticket with Member Care.

**30. How to enter advancements (belt loops, merit badges, etc.) in Scoutbook from the Registrar's perspective, and what access we need to do this fully (instead of only being able to enter the major ranks). There are still some units that do not use Scoutbook, and send in their Advancement Reports for the Council to enter on their unit membership.**

See answer to question #12.

**31. How to check what "program year" the Scout is working under, and to correct this if they are not set up with the correct year. E.g. for Eagle Scouts who might still have the old 2016 requirements linked to their profile instead of the new version. I can't see this on their record, but I know that it is there and the unit can see it from their side. If we had better permissions access in Scoutbook we could correct issues that the units are struggling with.**

Registrars are unable to change the version and must instruct the individual to switch versions in Scoutbook by clicking the advancement and toggling to the correct version.

Sample:



Scoutbook Plus will have functionality for Registrars to help users switch to appropriate version. Functionality exists for Cub Scouting. Registrars can go to <https://advancements.scouting.org>. They can search for a unit. Once they have found their unit and clicked on the unit. Click on the youth and the advancement and switch the version.

### **Needs Approval Report**

See answer to Question #15

### **- Needs Purchasing Report**

See answer to Question #15

### **- Needs Awarding Report**

See answer to Question #15

### **- What to do with members that are no longer part of their Unit**

Right now, the unit needs to expire their positions in Scoutbook. Scoutbook Plus will have a feature to inactivating members that will be available to Registrars in the coming months.

### **- Council Merit Badge and Requirements Import -- Understanding of how to use each of the elements within the feature. Helpful to know how we would include requirements.**

[Uploading Merit Badge Completions From Council or District Events - Scoutbook Knowledge Base](#)

### **- How to help a unit when they have a problem. We often get calls from units that don't know where to find the ability to print their Advancement reports.**

[Getting the Advancement Report or PO to Bring to Scout Shop from Scoutbook \(SB\) - Scoutbook Knowledge Base](#)