

## Getting Started with Scoutbook

There are TONS of great resources for getting started with Scoutbook. If you are a DIY type of person, you can read all kinds of posts and get all kinds of great ideas on how Scoutbook works and can work for your unit. All of these resources are available at: <http://bit.ly/scoutbook>

For those of you looking for simple directions all in one place, we've tried to compile a one stop shop to help guide you through your unit's set up of Scoutbook.

**STEP 1:** If your unit has never used Scoutbook before, one of your key 3 members, Key 3 Delegate, or Unit Advancement Chair (set in my.Scouting) should log in and setup the permissions for the unit. The term Key 3 stands for the unit leader (Cubmaster, Scoutmaster, Crew Advisor, or Ship Skipper), the unit Committee Chair, and the Chartered Organization Representative.

These Key 3 members sign in at <http://scoutbook.com> using the SAME login credentials you have created on my.Scouting. If the Key 3 member does not have a my.Scouting account, you can set one up at <http://my.scouting.org>. Be sure to associate your BSA Membership Number with the account

**STEP 2:** After you log in if you click on "My Dashboard" and "Administration" and you will see the units you are a member of based upon your BSA membership number. Then select the unit that you would like to log into. All of the units that are associated with your membership ID number are listed.

**STEP 3:** If you are a Key 3 Member, Key 3 Delegate, or Unit Advancement Chair, everything should be ready to go. Scoutbook for your unit is active! You can now start to use Scoutbook. For setting up your unit skip to STEP 5.

If you are one of these members, but someone else will be acting as your administrator for Scoutbook continue to the next step.

**STEP 4:** Click on your unit roster and you will see all of adults and youth registered in your unit. To give someone administrative access, click on their name and then in the lower right hand corner click on "+Add Position/Role". On the next screen under "Position" select Pack/Troop/Crew Admin from the Roles. Then give a "Date Started" date and click "Update."

**STEP 5:** Click on your unit at the upper left-hand corner. Now you will want to set up Dens (Packs) or Patrols (Troops). At the bottom right hand corner of the screen click on "Add Den/Patrol". Then name your Dens or Patrols and click "Add". Your Den/Patrol names will then appear. These Dens/Patrols will have not Scouts or Leaders associated with them.

**STEP 6:** Add Scouts/Leaders to Den/Patrol. Click on your Den/Patrol. To add Scouts, click "Reassign Scouts". All of the Scouts in the unit are listed. Simply select all of the Scouts that you wish to be in the Patrol/Den and click "Invite" at the bottom of the screen. All of the Scouts will automatically transfer over. Ignore the "Personal Message" section above, "Invite". No message actually goes out.

**STEP 7:** Make sure adults have the right access. An adult who is registered as a Den Leader or as an Assistant Scoutmaster does not automatically have access for the den/patrol that they are working with. From the adult roster, click on the leader, click "Add role or position" in the bottom right-hand corner. Add "Den Leader" or "Assistant Scoutmaster" and associate them with a Den/Patrol. Remember to give them a start date.

As an assigned "Den Leader" or "Assistant Scoutmaster" with a Den/Patrol these leaders will have the ability to approve advancements. If you want them to be able to update contact information, you can additionally make them a Den/Patrol Admin by following the same steps above.

To **REMOVE** access once it has been granted, simply follow the steps to assign and set an end date.

#### **Adding Parents:**

**STEP 1:** Click on the Scout and click on "Add a parent". If the parent is also a leader, their name will appear on the list already and you can click on that parent to link them to the Scout.

If the parent is not also a leader:

1. You can find them from a previous Scoutbook record (likely a transfer or crossover)
  - a. Click "+Add"
  - b. Use field for "Search for Existing User" (can search by name or email address-email address is preferable)
2. You can add them new
  - a. Click "+Add"
  - b. Fill out the form to add a new user
  - c. Make sure you click "Parent/Guardian"
  - d. Click "Invite"

*Note:* Parents do not have the ability to approve an advancement, they can only mark a completed date.