

# SCOUTBOOK

SOAR - Scouting Online Affordable & Reliable

[www.soarol.com](http://www.soarol.com)

## Introduction

Scoutbook is the official application from the Boy Scouts of America for managing your Roster and Scout advancement. Your SOAR website provides two features to help integrate the experience between SOAR and Scoutbook, and save you a lot of time.

The first feature is the **Scoutbook Page**. This makes Scoutbook a page within your SOAR website so your members can easily access both from the same place.

The second feature is **Scoutbook Import**. This allows you to take Roster and Advancement information from Scoutbook and import/synchronize it with your SOAR website. Thus you can keep a single source for this information and still easily use it in your SOAR website.

## Scoutbook Page

With this feature you get a Menu item called “Scoutbook” that members can click on and get the Scoutbook App in a page within your SOAR website. Members can then easily navigate between both SOAR and Scoutbook all within your SOAR website.

To turn the feature on/off go to *Admin/Control Panel/Features/Scoutbook Page* on your SOAR website.

Note: The logins for SOAR and Scoutbook are completely separate. When a member first accesses the Scoutbook site from within your SOAR website they will be asked to login with their Scoutbook account. Once the login, their browser will remember their account information so they can move back and forth between the two without logging in again.

## Import – Summary

Scoutbook is your primary source for your Unit’s Roster information – scouts, parents, leaders, contact information, Dens/Patrols, leadership positions, etc. Scoutbook is also the primary source for Scout

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advancement information. All updates to this information should be made in Scoutbook.

The SOAR **Scoutbook Import** feature allows you to transfer all that information over to your SOAR website electronically. The first time you do this, it will populate your SOAR Roster with the information from Scoutbook. On subsequent imports it will synchronize the Roster on your SOAR website with the information from Scoutbook.

- If a member was added to Scoutbook, that member will be added to your SOAR website Roster.
- If a member was deleted from Scoutbook, that member will be removed from your SOAR website Roster.
- All other member information will simply be updated on your SOAR website.

## Family Matching

Scoutbook has separate export files for Scouts and Adults. To create family groups we need to match Scouts and Adults between the two files.

**The best method to accomplish this is for each Adult in Scoutbook to have a unique email address. This will guarantee family matching.**

If that is not possible, you should make sure the following fields are filled in and consistent between all Scouts and Adults in the same family:

- Street Address – make sure spelling, spacing, and any punctuation is exactly the same. “Lane” and “Ln” are NOT the same.
- Home Phone Number

## Scoutbook/SOAR matching

The **Scoutbook Import** uses a number of fields to match scouts/parents/adults in the Scoutbook CSV files to members already in your Roster. Things like short vs. formal first names, misspellings, etc can affect the matching.

If you run the **Scoutbook Import** feature for the first time and you are not matching a lot of members already in your SOAR Roster you can do the following.

- Print out a report from Scoutbook with BSA IDs of all your members.
- On your SOAR website, use the Admin/Members/Members Edit/BSA IDs page to put BSA IDs into the SOAR Roster for all your members.

This will ensure much better matching on your first **Scoutbook Import**. On subsequent uses of the Import feature BSA IDs will already be there and guarantee good matching.

## Information Transferred

The **Scoutbook Import** will transfer the following information from Scoutbook to your SOAR website:

- Scouts, Parents, and Leaders,
- BSA ID
- First, Middle, Last, Suffix, Nickname
- Email Address (Adults only)
- Street, City, State, Zip
- Home Phone
- Work, Mobile Phone (Adults Only)
- Gender, Date of Birth
- Leadership Positions (Adults Only)
- Scout Patrol/Den
- Scout Rank (see below)

## Scout Email Addresses

Scoutbook’s export files do not include the email addresses for Scouts. We will populate the Scout’s first email address in SOAR with the first parent’s email address.

You can put the Scout’s email address in the Email #2 field in their Roster entry. The **Scoutbook Import** will not overwrite the 2<sup>nd</sup> or 3<sup>rd</sup> email address of any Roster entry on your SOAR website.

You can easily update multiple email addresses at a time on your SOAR website at *Admin/Members/Manage/Member Email*.

## Scout Leadership Positions

Scoutbook’s export files do not include Leadership Positions for Scouts. You can add Scout Leadership Positions to your SOAR website at *Admin/Members/Manage/Leaders*.

A **Scoutbook Import** will not change the leadership information for Scouts on your SOAR website.

## Adult Leadership Positions

The **Scoutbook Import** will transfer over adult leadership positions except for the following.

- Asst./Den Leaders – While the Adult export file does include their position, it does not include a reference to which Den they are a leader for.
- Patrol Advisors – same as above.
- Tiger Adult Parents – we are pulling these out so they don't show in your leadership report.

You can add Den Leaders and Patrol Advisors on your SOAR website, with their associated Den/Patrol. The **Scoutbook Import** will not overwrite them.

Note: Scoutbook is not currently 100% reliable in putting all adult leadership positions into their export file. If you are missing an adult leadership position on your SOAR website after a **Scoutbook Import**, it is not an issue with the import function. Please report your issue, in detail, to Scoutbook on their forums in the hopes they will fix this issue.

## Scout Rank

All Ranks for Cub Scouts are transferred over.

Ranks for Boy Scouts are transferred over if the Scout has a BSA ID. This is a matching issue because the Advancement information is contained in a separate file and we need the BSA ID to match members between the Scoutbook export files.

## SOAR Roster Updates

In addition to the information transferred over from Scoutbook, you can use your SOAR website to keep track of the following additional information:

- 2<sup>nd</sup> and 3<sup>rd</sup> email address
- Notes field
- Custom Roster Fields
- Medical Form Dates
- Medical Information
- Cell Phone Number (Scout)

## Troopmaster/Packmaster

When you do your first **Scoutbook Import**, if you have previously import from Packmaster/Troopmaster it will ask you to confirm this information will be removed.

This is NOT removing your Roster data. It is only going to remove the following from your SOAR website:

- Internal Troopmaster/Packmaster IDs used for the Import process that are no longer needed.
- Scout Advancement information because it will now be outdated.

## Roster Edit Own Feature

Your SOAR website has the ability to allow individual members that are logging in to update their own contact information. When you are using Scoutbook in conjunction with SOAR you don't want members updating their own information. The information should all come from Scoutbook.

You can turn this feature off at *Admin/Members/Options/Roster Settings*.

If the **Scoutbook Import** notices this option is turned on, it will prompt you to turn the feature off.

## Account Self Registration

If you are using the Individual Accounts option on your SOAR website, there is a feature to allow members to create their own accounts on your website - with administrator review. When you are using the **Scoutbook Import** feature all account creations will be coming from that import. Any use of the self-registration feature will create duplicates accounts on your SOAR website.

You can turn this feature off at *Admin/Control Panel/Membership/Options* – Individual Accounts.

If the **Scoutbook Import** notices this option is turned on, it will prompt you to turn the feature off.

## Import – Process

Before beginning a **Scoutbook Import** you will need to export three files from Scoutbook

- Scouts.csv
- Adults.csv
- Advancement.csv

To start the process go to *Admin/Import/Scoutbook/Import* on your SOAR website.

If you have any of the following issues, the process will first prompt you to fix them.

- Troopmaster/Packmaster data
- Roster Edit Own feature turned on
- Account Self Registration turned on

If this is your first **Scoutbook Import**, the process will want to know how to handle existing Roster entries in your SOAR website. You have two choices:

1. Match – The process will try to match data in the Scoutbook CSV files with those members already in your SOAR website Roster. This will be done based on member data such as name, email, phone, address, BSA ID, etc. This matching will not be perfect, so expect that some accounts in your existing SOAR website Roster will be re-created during the process.
2. Append – The process WILL NOT match against members already in your SOAR website Roster. All members contained in your Scoutbook CSV files will have new Roster entries created in your SOAR website Roster. This has the potential to create duplicate accounts in your SOAR website Roster.

The default is the Match option. The majority of customers should use this choice. Do not choose Append unless you really know what you are doing !

The process will then provide you the following import options (if you are using the Individual Accounts option)

and ask you for the location of your Scoutbook CSV files on your local computer.

- Adult Logins? – Do you want to provide a login account for each Parent/Adult Leader Roster entry added.
- Scout Logins? – Do you want to provide a login account for each Scout Roster entry added.
- Notify Users? – Do you want to send an email to each new member added to the Roster through the Import process. The email includes their username, system generated password, and a link back to your SOAR website. This WILL NOT occur for members that are simply updated during the Import process – just new members.

The process will then read the data from the Scoutbook CSV files, compare it to your existing SOAR website Roster, and provide you a Verify screen. This screen will tell you what is going to happen on your SOAR website when you confirm the Import function.

### Summary:

```
12 new members will be added.
76 current members will be updated.
2 members will be deleted.
```

### Warnings and Errors:

```
WARNING: Scout [John Scout] missing
Address
WARNING: Scout [Jason Smith] missing
Patrol assignment
```

The Verify screen will help you determine if everything looks as you would expect before you modify your SOAR website Roster. It will also give you warning/error messages about missing information or potential family matching issues coming from your Scoutbook data.

If all looks good, click Confirm and Scoutbook data will be imported into your SOAR website.

If you think there is a problem, simply click any other link in the Menu or Administration menu to cancel out of the **Scoutbook Import**. You can then go back to Scoutbook and fix and data issue you are having and start the process over.

## Update Frequency

Most units will perform a **Scoutbook Import** a few times a year during the following times:

- After Cub Scout recruitment to add new Scouts.
- After the end of the Cub Scout year to advance all Dens in Rank.
- Crossover for when Troops add new Scouts.
- After summer camps to update Advancement Information.
- After Court of Awards for Troops.

You are welcome to use the **Scoutbook Import** as frequently as you like.

## Frequently Asked Questions

*I have a number of Scouts and Adults that are not connecting as a family unit.*

See the section on Family Matching above for methods to improve the ability for the **Scoutbook Import** to improve this matching.

*I'm doing my first **Scoutbook Import** and I'm not getting good matching between Scoutbook and SOAR.*

See the section on SOAR/Scoutbook Matching above for methods to improve the ability for the **Scoutbook Import** to match members between the data found in Scoutbook and that in your SOAR website roster.

*All of my adult leadership positions are not showing up after a **Scoutbook Import**.*

See the section on Adult Leadership Positions above for more details. This is a Scoutbook issue unfortunately.

*Does the Scoutbook Import transfer over Advancement information?*

Not yet. This will be the next thing we start working on after launching the **Scoutbook Import** feature.

*Can we transfer over the Calendar from Scoutbook?*

Scoutbook does not currently have an export for the Calendar in their product.