Unit Roster Upload

Frequently Asked Questions:

Who can upload a unit roster?

- Unit leaders (Cubmaster/Scoutmasters) who have taken ownership of their unit pages and people who have been given the right to administer the unit rosters by the unit.

Who can view the roster and personal information?

- Only those people who can upload the information can view it.

Where are the unit rosters held?

- Each unit has a site on www.redwoodbsa.org. The unit roster link is listed on the right hand margin of the page. For security reasons, in order to see this link you must have a MyCouncil account, be signed in and have permission to view the unit roster.

What information is needed for each person?

- Required:
  - o BSA ID (called BsaPersonId)
  - o First name and
  - o Last name
- Strongly recommended so that we can contact people in case of emergency or if there is a change to the event:
  - o An email address for each person (for children under 13 this should be their parent's email and for those over 13 this can be either the Scout's or their parents. Multiple people may share the same email, but please note – if an emergency or event change email is sent the email will receive multiple copies).
  - o At least one phone number
  - o Sex (ensures the right facilities are available for Venturers, Explorers and leaders)
- Strongly recommended for youth:
  - o Birthdate (to ensure the right program is being offered)
- Optional but not recommended
  - o Address
  - o Multiple phone numbers

Why ask for the BSA ID?

- The BSA ID is a unique way to identify an individual. First and last names are not good in matches because they are often misspelled or prone to "nick names" one week and full names the next. After the initial upload you can do additional loads. At that time the program gives you options to replace the existing individual matching records, keep the existing matching records (and not upload the match) or choose which matching record you want to keep. In order to make the match the BSA ID is used.

What are the advantages and disadvantages of purging the existing roster and what do you recommend?

- Advantages:
  - The existing roster does not have the BSA ID information. By doing a wholesale replacement the first time you can avoid editing each individual and adding their ID.
  - It's clean, fast and gets rid of former Scout's Quickly
- Disadvantages:
  - If you use the file provided by the Council Service Center the email may be old, incorrect or not match the one you are using (however you may update it before you use it).
  - Special Needs are not part of the Upload and will be lost.
- Recommendation:
  - Take a quick look at the old information and capture any special needs or email information you want to retain. Add the email to the template and save the special needs info on a notepad and another file. Then purge the existing unit roster

Why Can't I change the template?

- The upload functionality only recognizes those fields in that specific order and skips the first row (the column headers). The editing routine will fail if you move the column order around or add additional fields.

Why am I asked to choose from the list of Duplicate Record Handling Options if I have purged the roster or the roster is empty before I begin?

- The Boy Scout motto is be prepared. The upload function also wants to be prepared in case it runs into a record. And like the occasional Scout, this program is stubborn and won't move forward without instruction.

Can I add Scouts in the future as they join?

- Yes. That is what the Duplicate Record Handling Options are designed to assist you in accomplishing. After your initial upload and if you do not purge your records, the system will use the BSA ID to see if there is a matching record. If there is not a matching record, your new Scout will be added.

How do the Duplicate Record Handling Options work?

- Once your records have a BSA ID you can choose from three options when doing future roster uploads:
    - Keep Existing Data and Discard from imported file: This means that if the system finds a matching record based on the BSA ID, the record that existing in the unit roster prior to the upload will be retained and information for that BSA ID in the upload file will be ignored.
    - Replace Existing Data with Data from the Imported File: This means that if the system finds a matching record based on the BSA ID, the record that existing in the unit roster prior to the upload will be deleted and the information that the BSA ID in the upload file will be added to the unit roster.
    - Show Each Duplicate Record Set and Let me Choose: This means that each time the system finds a matching record based on the BSA ID you will get to choose to keep the record that existing in the unit roster prior to the upload or to replace it with the record that is part of the upload. Please note that you cannot keep a partial records from one source (ex: Johnny's existing file phone number) matched up with the partial record from the other source (Johnny's new email address from the upload file).

Where can I find the BSA ID (or other roster information)?

- The charter renewal
- Internet Advancement
- MyScouting Tools
- By sending a request to the head registrar Tracy.Good@Scouting.org or webmaster@redwoodbsa.org. The roster will be based on the ScoutNet roster as of January 1, 2014 and loaded in the template. Please include your unit, town and district information in this request. For security reasons, only request by the registered unit leader, chartered organization rep or committee chair will be completed. We will not send unit roster information to third parties saying that this task has been given to them or to individuals who are not currently registered in one of these three positions.

I don't have Excel, what can I do?

- Unfortunately, Excel is required for this process. We suggest that someone else in your unit do this task. If no one else is eligible for your unit, please let us know at webmaster@redwoodbsa.org and we will find a solution for you.

I am having problems loading my file. Errors keep occurring. What is wrong?

- Mostly this can be due to formatting problems.
  - Make sure that you did not make any changes to the format of the template.
  - All empty fields should be "blank". Sometimes a space that appears to be empty my actually have a space in the cell. You can fix this by highlighting spaces that appear to be empty and pressing "delete".
  - The BsaPersonId, the FirstName and LastName fields must not be blank.
  - Email must be in the correct format (xxx@yy.ZZZ).
  - Zip codes are either 5 digit, Zip+4 (NNNNN-NNNN), or Canadian format.
  - Phone numbers: These should be entered with dashes separating the area code, and other sections of the phone number (707-546-8137).
  - Phone number type: The acceptable codes are H, W or M. H = Home, W + Work, M = Mobile.
  - Birthdate: must be in the format MM/DD/YYYY (this is not an important field for adults).
  - Sex (M or F) – this is more important for Venturer and Exploring Scouts.

If you have a question that not answered here, please send your question to webmaster@redwoodbsa.org and we will make an effort to respond to your question.