



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: bit.ly/scoutbook ...



SETTING UP YOUR UNIT FOR THE SCOUTBOOK YOUTH ADVANCEMENT SYNC

Scoutbook will automatically sync advancements with MyScouting/Akela and ScoutNet/PAS (the BSA Council Tools)

This change eliminates the necessity of generating a .csv file from Scoutbook, logging into Internet Advancement and uploading the file. There is no longer a need to access Internet Advancement for this Unit.

Your advancement records, when approved in Scoutbook will be recorded at the BSA and your local council will see them in their ScoutNET system. Allow a day for the data from Scoutbook to appear in ScoutNET, however you can purchase your advancements right away. If it is in Scoutbook, and the Scout is synced, then the record is officially recorded with the BSA. You will be able to print the Advancement Report from Scoutbook to obtain the advancements at the Scout Shop.

This first phase is only syncing youth advancement records.

Since Akela only tracks completed and signed off advancements; only 'approved' advancements will transfer from Scoutbook to Akela. Partial completions, and items only marked completed and not approved will continue to be tracked only via Scoutbook.

When there is an approved change in an advancement in Scoutbook, it will be reflected in the council records. When the council records change it will be reflected in Scoutbook. The record with the most recent update date will take preference.

Advancements that require District, Council or National approval will not be uploaded from Scoutbook; instead they will flow from ScoutNet through to Scoutbook.

To make sure your unit is ready for the Scoutbook Advancement Sync, do the following:

- 1) Make sure all Scouts on the roster are registered in the unit and have their current BSA Member ID in their profile. A unit key 3 member (Unit Leader, Chartered Organization Representative or unit Committee Chair) can go to Member Manager at <http://my.scouting.org> and download a unit roster which has the member ID and registered name for each Scout. NOTE: For the membership ID to be accepted by Scoutbook, the Scout's First Name or Last Name must be exactly as it appears in the first name or last name field in your council's system. HINT: If you perform a ScoutNET import the BSA Member # should auto populate into Scoutbook for you. If you have problems, please contact your council registrar and ask them which name is in which field. Follow the directions found at <http://bit.ly/scoutbook>
- 2) Make sure there are no duplicate Scouts on your roster in Scoutbook.
- 3) The person who will be setting your unit up for the sync needs to be: a unit key 3 member (Unit Leader, Chartered Organization Representative or unit Committee Chair.) They will need to verify their My.ScoutingTools login credentials so they should check that they can log in at <http://my.scouting.org> and they are listed as a key 3 member there. Scoutbook unit administrators can activate any additional Scouts that join the unit after the initial activation occurs.



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: bit.ly/scoutbook ...



- 4) Make sure there are at least 3 unit admins in your unit.

To Setup Your Unit

Setup must be performed by a currently registered key 3 member. Make sure you have entered your BSA Member # into your profile and setup yourself as a Key 3 or Unit Admin. Make sure you appear on the current BSA charter as a Key 3 member. You can check this through Member Manager on the my.Scouting.org website.

When you activate advancement sync, all approved Scouts in your Scoutbook roster will be setup for the sync. If you wish not to include a Scout in the sync, make sure their Scoutbook account is marked as 'unapproved.'

Once invited to participate in the Advancement Sync, you can setup your unit when you are ready. When you wish to setup your unit for the advancement sync, go to the edit Pack (or Troop) page in Scoutbook. When you go to that page you will see the following at the bottom of the page.

BSA Advancement Sync

Congratulations! Your unit is now eligible to take part in the BSA Advancement Sync.

What is the BSA Advancement Sync?
 Advancement sync allows your unit to approve advancement in Scoutbook and have it automatically sync with the BSA national database. Once your unit is setup for the sync you will no longer need to use **Internet Advancement**.

Steps to get setup
 The following steps must be completed before activating the sync (click on each step for more information):

<input checked="" type="checkbox"/>	Unit Setup
<input type="checkbox"/>	Key 3
<input type="checkbox"/>	Verify yourself
<input type="checkbox"/>	Verify Scout Roster

I have communicated with the troop committee and members of the key 3 and we are in agreement to activate advancement sync in Scoutbook.

As each of the steps are satisfied you will receive a green check mark next to its name. Clicking on any of the descriptions will provide you with instructions for that step. As each item on the check list is completed, Scoutbook will detect the status and automatically check it off the list. You have to have all the steps complete before you can activate the sync.

The checks are as follows:

This and other similar Help Documents and Resources was compiled and provided by the Scoutbook User Advisory Council (SUAC) with the help of Scouting Volunteers and professionals across the Boy Scouts of America. The SUAC is comprised of volunteers and does not officially represent the professional opinion or views of the Boy Scouts of America.

6/21/17



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: bit.ly/scoutbook ...



1. **Unit Setup:** You must have a current unit subscription with at least 3 active Unit Administrators. Your unit must be properly matched with a current BSA unit roster.
2. **Key 3:** Scoutbook will check to see if you are a registered Key 3 member in your unit. Setup must be performed by a currently registered key 3 member, which is a Unit Leader (i.e., Scoutmaster, Cub Master, Varsity Coach, Venturing Advisor, or Skipper) Committee Chair, or Chartered Organization Representative for the unit being synced. Make sure you have entered your BSA Member # into your profile and setup yourself as a key 3 in the Scoutbook roster. Also, make sure you appear on the current BSA roster as a key 3 member. You can check this through Member Manager on the my.Scouting.org website. Scoutbook unit administrators can activate any additional Scouts that join the unit after the initial activation occurs.
3. **Verify Yourself:** Scoutbook will ask you for your login credentials for my.scouting.org to verify the person setting up the sync is who they say they are.
4. **Verify Scout Roster:** Make sure all Scouts on your Scoutbook roster match those found on your official BSA unit roster. The BSA Member # must match.
HINT: If you perform a ScoutNET import the BSA Member # should auto populate into Scoutbook for you. You can view your official BSA unit roster through the my.Scouting.org website.

When you have completed all the items, click on the "I have communicated with the unit committee" Box and then click on Activate Sync and the sync will be activated for your unit.

FREQUENTLY ASKED QUESTIONS

What is Akela?

Akela is the database behind myScouting Tools. It automatically syncs with the older PAS database which is behind ScoutNet. These tools are where the BSA keeps membership, advancement and training records.

If my unit signs up for Scoutbook Advancement sync, do I still have to use Internet Advancement to obtain badges at the Scout Shop?

The necessity of using Internet Advancement will be replaced with an automatic sync to the BSA national database (Akela). There is no longer a need to use Internet Advancement for your unit. You will instead print and sign the Advancement Report (34403) in Scoutbook (under the Purchase Order) and take it to the Scout shop to purchase items to be awarded. [See an example Advancement Report here.](#)

NOTE: After activating sync in Scoutbook, Internet Advancement will no longer show accurate data for your unit. It is recommended that you do not use it going forward.

How frequently is the sync?



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: bit.ly/scoutbook ...



When you approve advancement the record will be placed in Scoutbook and Akela in a few minutes. Changes made at council may take a day to be reflected in Scoutbook. Changes will be reflected in ScoutNET. ScoutNET is updated regularly. Allow 1 day for the data from Scoutbook to appear in ScoutNET, however you can purchase your advancements right away. If it is in Scoutbook, and the Scout is synced, then the record is officially recorded with the BSA. You will be able to print the Advancement Report from Scoutbook to obtain the advancements at the Scout Shop.

How does using Scoutbook differ from Internet Advancement?

When submitting awards through Internet Advancement, a person enters a batch of awards and advancements into the system. Then "submits" all the awards and advancements at one time. When they submit them they receive a printable Advancement Report that they can take to the Scout Shop to purchase awards.

In Scoutbook, once the unit is signed up for the Advancement Sync, each award will automatically synchronize with the Akela database as soon as it is "Approved" (or "Approved" and "Awarded") and the page is updated or saved.

To obtain an Advancement Report for approved but not awarded items, you use the Needs Purchasing report from the Troop Page, create a Purchase Order for the items you need to purchase, just like you do today, and then click on the Advancement Report button at the bottom of the page. You will receive an Advancement Report that you can then bring to the Scout Shop.

If an advancement is marked as "Approved" and "Awarded" at the same time, then it will bypass the Purchase Order in Scoutbook, just as it does today.

How will the initial setup of the sync work?

Units already using Scoutbook will be asked to sign up for participating in the sync. This will allow unit Scoutbook administrators time to make sure their advancement records inside Scoutbook are correct and up to date. When ready the unit will be able to click on a button that will walk the unit key 3 member through the sync setup process.

Note that only a member of the key 3 (unit leader, committee chairman, chartered organization representative) will be able to activate advancement sync for the unit. After the unit has been activated for the sync, any Scoutbook unit administrator may activate individual Scouts.

During the initial unit sync – All approved Scouts will be sync'd with Akela. A Scoutbook unit administrator should unapprove any Scout they wish not to be included in the sync prior to activating Advancement Sync.

When the unit is setup for the sync for the first time Scoutbook will kick off a routine that will automatically check all Scouts and insure that any approved advancements in Scoutbook that are not recorded in Akela are



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: bit.ly/scoutbook ...



recorded in Akela. The routine will also assure that any advancements, for all Scouts in the unit to be synced, that are recorded in Akela are recorded in Scoutbook. This will be automatic during the sync setup for the unit.

After the unit has been setup for the sync, if a Scout is added to the unit, or was not initially included in the sync and the unit would like to include them, Scoutbook will allow the unit to initiate a process that will automatically insure that, for that Scout, any approved advancements in Scoutbook that are not recorded in Akela are recorded in Akela. The routine will also assure that any advancements, for that Scout, that are recorded in Akela are recorded in Scoutbook.

I have activated my Scouts for the advancement sync, how quickly will their records in Scoutbook be updated?

Allow one hour for the Scout's records in Scoutbook to be updated with what is recorded at your council.

What happens when a new unit is put into Scoutbook?

New units will be able to opt into the advancement sync. Scoutbook will lead the unit administrator through the process of syncing their unit advancement.

Will third party uploads to Internet Advancement stop when the sync rolls out?

There are no plans on stopping the support of the upload of comma separated value files (.csv) into the BSA advancement system.

Is Internet Advancement going away?

There has not been any announced date when Internet Advancement might go away. Now that the sync is in place Scoutbook replaces Internet Advancement for those units; thus reducing the number of units utilizing Internet Advancement and moving closer to decommissioning the application as we know it today.

Will individual profile records be updated? For example, if I update my address will it update at council?

Only youth advancement and awards information will sync. Other information will not sync at this time.

Will Scouts or leaders automatically be added or deleted from our roster in Scoutbook by the advancement sync?

No, only youth advancement and awards information will sync. Other information will not sync at this time.

Will completed, approved or awarded dates be sync'd?

We will sync approved dates. In other words, the date that is approved by the person authorized to approve the date will be sync'd. This is how the sync will know what to include.

Can I remove an approved date we put in by accident?

Yes, if you remove it in Scoutbook, it will be removed at council.



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: bit.ly/scoutbook ...



If a unit adds minimal information (name, BSA ID, DOB) for matching purposes, will other info then sync (address, phone?)

Only youth advancement is syncing in this upgrade.

I am receiving an error when I update a Scout's profile saying the membership ID does not match.

Scoutbook is now checking when you put in the membership ID (or make an update to the Scout's profile containing a membership ID) to make sure the membership ID matches the Scout on file. The membership ID will be used for the Advancement Sync. For the membership ID to be accepted by Scoutbook, the Scout's First Name or Last Name must be exactly as it appears in the first name or last name field in your council's system. If you have problems, please contact your council registrar and ask them which name is in which field.

The error message you will receive is: "BSA Member #: The BSA Member Number did not match the name. Please check the number and the spelling of the name and try again."

I am getting an error when I try to activate a Scout to the Advancement Sync saying the Scout was not found on the official BSA unit roster however he shows up in Internet Advancement and MyScouting Tools.

If he shows up in Internet Advancement and MyScouting Tools and you are receiving this error, wait until the next Wednesday and try again. Our list is updated on Wednesdays. If he does not show up in Internet Advancement or MyScouting Tools, your council may not have completed registering him. Check with your local council service center.

If a Scout who was registered in another council moves into my unit is there a way to synchronize their previous advancement?

If the Scout's previous unit used Scoutbook:

Follow the directions found at <http://bit.ly/scoutbook> for moving a Scout from one unit to another in Scoutbook. Make sure the Scout is registered in your council. Once registered, activate the Scout for Advancement Sync and the advancement records inside Scoutbook will transfer to the council's records for the Scout (i.e., Akela.)

If the Scout's previous unit did not use Scoutbook:

You can manually update the record in Scoutbook and when the Scout is registered in your council, enter their new membership ID, activate the Scout for Advancement Sync and their advancement will transfer from the council's records for the Scout (i.e., Akela)

If the Scout is transferring inside your council, Follow the directions found at <http://bit.ly/scoutbook> for moving a Scout from one unit to another in Scoutbook, activate the Scout for Advancement Sync and their council records will follow them.

What happens if Internet Advancement has Scouts that Scoutbook does not? Do they automatically get imported to Scoutbook, possibly pushing the unit over their subscription?

This and other similar Help Documents and Resources was compiled and provided by the Scoutbook User Advisory Council (SUAC) with the help of Scouting Volunteers and professionals across the Boy Scouts of America. The SUAC is comprised of volunteers and does not officially represent the professional opinion or views of the Boy Scouts of America.

6/21/17



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: bit.ly/scoutbook ...



When the unit admin sets up the Advancement Sync in Scoutbook, they will be asked to identify the Scouts who they wish to have synchronized.

In Internet Advancement, a council registrar is the only one who can remove an advancement / award / merit badge that was put in by mistake. If an award is approved in Scoutbook by mistake, it can be removed by leaders in the unit? If an award is removed in Scoutbook, will it also be removed in ScoutNET? Or will units still need to go through their council registrars?

If the unit leader removes or updates an advancement that was entered by mistake in Scoutbook the system will remove or update it in ScoutNET and vice versa. You will not have to perform the update twice any longer.

Will Units be able to select certain Scouts to have advancement info synch or will it be everyone all the time in every synch?

If you wish to approve advancement for the Scout and they are on your Scoutbook roster, you will need to activate the sync for them. If you have Scouts who are not active and are on your BSA roster you can remove them from your Scoutbook roster. See the user guide we have on how to do that. If you want them to remain on your Scoutbook roster and you will not be approving advancement for them, just edit their profile and select 'Disapprove Position.'

Will I be able to enter Eagle Rank or other national or council awards in SB and have them sync with the national database?

Eagle and Quartermaster ranks and awards that require national or council approval need to be entered by national or council. They will show up in Scoutbook after the databases sync.

I have a Scoutbook Sync question, who can answer it?

Send your question to: ScoutbookSync@gmail.com