

Unit Roster Upload Tutorial

The unit roster upload is fairly simple and intuitive for experienced users. We are providing this tutorial for individuals who want detailed instructions. We also refer individuals to the initial announcement and the Frequently Asked Questions (FAQ) documents. Questions concerning these instructions may be sent to buckeye@bsamail.org.

Before you begin:

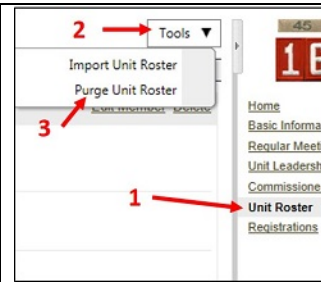
- Gather your roster information. Information needed for each person on the file is:
 - Required:
 - BSA ID (called BsaPersonId),
 - First name and
 - last name
 - Strongly recommended so that we can contact people in case of emergency or if there is a change to the event):
 - An email address for each 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).
 - At least one phone number
 - Sex (ensures the right facilities are available for Venturers, Explorers and leaders)
 - Strongly recommended for youth:
 - Birthdate (to ensure the right program is being offered)
 - Optional but recommended:
 - Address
 - Multiple phone numbers
- Make sure you have a MyCouncil account and that account has permission to create registrations and upload unit rosters.
- Sign into www.buckeyecouncil.org and go to your unit website.

Tools you will need:

- A computer with internet access
- Excel & knowledge of how to cut and paste or otherwise fill in an excel worksheet.
- Printouts of the Tutorial and any of the FAQs you think you need.

Steps to upload your unit roster

- 1) Open the Unit Roster: In the right-hand margin of your unit website you will see the Unit Roster link. Click it to open the Unit Roster (if you do not see this, please review the Unit Website FAQ and the Unit Roster Upload FAQ)
- 2) Purge your Existing Data (Optional): Please see the Unit Roster Upload FAQ for the advantages and disadvantages. We recommend that a purge be done the first time that the roster upload function is used.
 - a. Click the “Tools” down arrow (#2 in the right hand picture)
 - b. Click Purge Unit Roster ((#3 in the right hand picture)



- 3) Complete the Roster Purge: Click “Yes-Purge Roster” (shown below)

Purge Roster

This tool will purge all records from your Unit Roster. Once purged, they are not recoverable.

This tool is intended to help you initialize your Unit Roster and should only be used when you want to completely clear out your unit roster. All purged/deleted records will also lose any history associated them. Do not purge all records each time you import data into your roster. Instead, use the tools for managing duplicate records when you import.

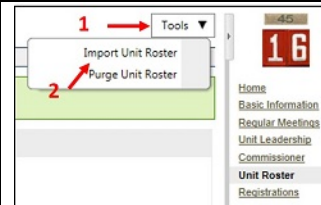
Do you want to purge all records? (When you click the Yes button below, all records will be purged)

- 4) You will see the following confirmation message (shown below):

Unit Roster

All records successfully purged from Unit Roster

- 5) Start the Import Process (shown at right)
 - a. Click the “Tools” down arrow (#1 in the right hand picture)
 - b. Click Import Unit Roster (#2 in the right hand picture)



- 6) Click “Download Template” and open the excel file (shown below)

Import Roster

Choose

File: [Download Template](#)

Duplicates:

7) The first worksheet in the excel file (labeled "Read Me") contains the instructions and formatting notes (shown below)

	A	B	C	D
1	General Notes			
2	All data should be placed in the "Data" worksheet that is part of this file.			
3	Do not rename the "Data" worksheet			
4	Do not remove the top row or change column headings/names			
5	Do not leave blank rows in your data (data will not be read beyond a blank row)			
6				
7	Data Field Notes	You must provide an entry for required fields, all others may be blank		
8	BsaPersonId	Required Field		
9	NameFirst	Required Field		
10	NameLast	Required Field		
11	Email	Must be in proper email address format		
12	Address	Street or Mailing address		
13	City	Address: Name of city		
14	State	Address: Two letter ABBREVIATION of state or province		
15	Zip	Address: Zip code - 5 digit, Zip+4 (NNNNN-NNNN), or Canadian format		
16	PhoneHome	Must be in the format NNN-NNN-NNNN		
17	PhoneWork	Must be in the format NNN-NNN-NNNN		
18	PhoneMobile	Must be in the format NNN-NNN-NNNN		
19	PrimaryPhoneType	Use these codes: H = Home, W = Work, M = Mobile		
20	DateOfBirth	Must be in the format MM/DD/YYYY		
21	Gender	Use these codes: M = Male, F = Female		
22				

8) The roster information needs to be entered into the second worksheet (see below). This can be cut and pasted from another file or retyped. Be careful to enter data correctly. Helpful hints are included in the Unit Roster Upload FAQ. Remember to save the excel file when you are done (and where it is saved).

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	BsaPersonId	NameFirst	NameLast	Email	Address	City	State	Zip	PhoneHome	PhoneWork	PhoneMobile	PrimaryPhoneType	DateOfBirth	Gender
2														
3														
4														

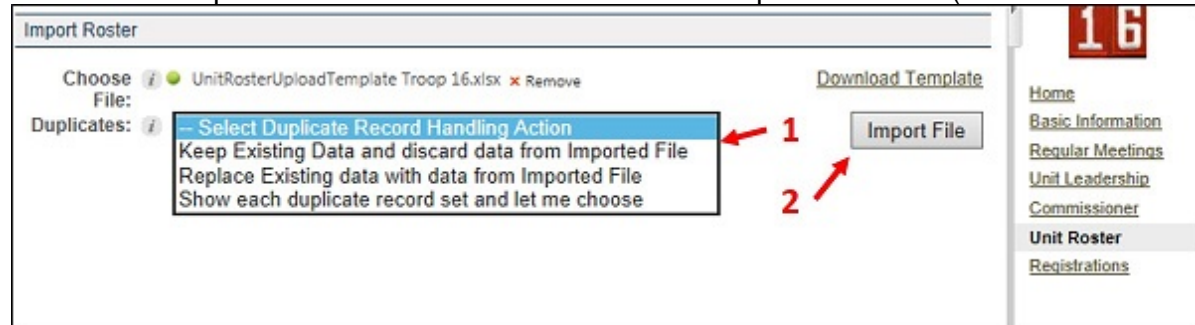
9) Click the select button (shown below) and follow the prompts to select the file you saved in step 8)

Import Roster

Choose File: ← [Download Template](#)

Duplicates:

10) Select a duplicate record handling option (shown below as #1). The duplicate records match based on the BSA ID. If the existing roster does not have BSA IDs filled in then all records in the upload file will be added. Then click the Import file button (shown as #2 below).



11) If your file is correctly formatted you will get the message below. If it not correctly formatted you will get an error message and instructions. Note the instructions, open the excel file and return to step 8 to fix any format errors. After the format errors follow the instructions in steps, 9, 10 and 11. Please remember that helpful hints are included in the Unit Roster Upload FAQ



Congratulations, you are done.

To view your new unit roster, click the Unit Roster link in the right hand margin.

