Key 3 Data Use: Accessing and Using you Unit's Membership and Training Data

This information is accessible by Unit Key 3's, Key 3 Delegates, and Membership and Training Managers (see "Manage Who has Access to Unit Data" pdf to allocate this access).

Login to your My.Scouting account. Select your unit in the "Menu" dropdown. Then choose "Training Manager" (You may also choose "Member Manager" to work with a different set of data). If the right scroll bar does not appear, toggle the "Menu" dropdown a couple times.

"Training Manager Dashboard "opens with "pie" charts of your unit's Youth Protection training and other "position -required" online and classroom training percentages. See "Position Trained Requirements" pdf. (If you have access to District data or more than one unit, you may need to choose which unit's data to look at.) The screen clip below summarizes several choices for accessing data.





This My.Scouting site navigation aid will show details about how to:

- 1- Search, access, and print an individual's training record
- 2- Add a training course to an individual's training record
- 3- Access downloadable YPT statistics for your unit
- 4- Access downloadable statistics for all other training for your unit
- 5- Download data into a spreadsheet, sort data, and a few ways to use that data

Remember that the data you are accessing is private and is to be used only for authorized purposes on behalf of the Boy Scouts of America. Disclosing, copying, or making any inappropriate use of this information is strictly prohibited.

1- Search, Access, and Print an Individual's Training Record

To check an individual's training record, choose the unit they are in, then click the magnifying glass icon above the "pie" charts. This brings up a list of individual leaders in that unit. Choose the individual or multiple individuals or choose the green "Select All" check mark in the upper right corner. Then click on the "View Training" icon in the upper menu bar to look at their training record(s). Alternately you may choose the "Print Member Training Report" icon to download a printable PDF of this information into your "Downloads" folder.



2- Add a training course to an individual's training record

If you have a leader that has a completed and dated training certificate, but has not received credit for the course, you can add that training to the individual's record. At the "Training Manager Dashboard" page, click on the "Add Training" icon above the "pie" charts. On the "Add Training" page, 1- first choose the program area for the training from the left dropdown. 2- Then choose the training course from the middle dropdown. 3- Choose the course completion date on the right. 4- Finally, click the "Add Member" bar on the left of the page and search for the individual, enter their name, or enter their BSA ID (see screen clip below).





3- Access downloadable Youth Protection Training statistics for your unit

At the "Training Manager Dashboard" page, click on the blue, page-shaped "YPT Aging Report" icon above the YPT "pie" chart. This opens another page with all your unit leaders' YPT records. As a short-cut, clicking on the red "untrained" portion of the "pie" chart will open a page with all the untrained leaders' records. On this "YPT Aging Report" page, arrows above each column allow you to sort all the columns by the data in that column. The blue and red "export" buttons at the top



of the page allow you to download a file of the selected data into your "Downloads" folder.

4- Access downloadable statistics for other "Position- Required" training courses for your unit's leaders

Similarly, at the "Training Manager Dashboard" page, click on the blue, page shaped "Trained Leaders Report" icon above the Trained Leaders "pie" chart. This opens another page with your unit leaders' "position-required" training records. As a short-cut, clicking on the red "untrained" portion of the "pie" chart will open a page with all of your unit's untrained leaders' records. On this "Trained Leaders Status" page, the far right columns include information about which "position-required training" classroom courses and online modules each individual has completed or still needs to do. (See the "Position Trained Requirements" pdf for a list of online training courses required for each BSA position.) Arrows above each column allow you to sort all the columns by the data in that column. The blue and red "export" buttons at the top of the page allow you to download a file of the selected data into your "Downloads" folder.

5- Download data into a spreadsheet, sort data, and a few ways to use that data

Once you've accessed the "YPT Aging Report" or the "Trained Leaders Report" data page, clicking one of the blue "export" buttons at the top of the page will allow you to download a "comma-separated value" (.csv) file of the selected data into your "Downloads" folder. Double clicking this file will usually open it in your own spreadsheet software (e.g. Excel). At this point you may manipulate the spreadsheet to summarize the data in an efficient way using a variety of tools:

- Delete columns of data you don't need (simplifies the page for viewing)
- Select the entire data set, then sort it by name, position, and/or whichever combinations of fields that are useful (example: 1-select all data fields you wish to sort, 2choose "Data" tab,3- Then choose "Sort", 4- then in the window choose what column to "Sort by" in the dropdown, 5- then select "Add Level" to add another column for sorting and choose that column, etc., 6- then select "OK").
- Highlight useful or interesting data like which leaders' training is about to expire (example: 1-Choose a column of data to selectively highlight, 2choose the "Home" tab, 3- then choose the "Conditional Formatting" dropdown and, 4-select the "Highlight Cell Rules" and select a formula, 5- In the window select or type in a field value to compare to, 6- choose color to highlight from dropdown, 7- Click "OK"



X 2 7 -		0000	TrainedLea	der_Shakori_09(9)	.csv - Microsof	ft Excel non	-commercia	l use
File Ho	ome Insert Page Layou	t Formulas	Data Review	View				
*	Calib + 11 +	A A = = = 🔊 🖓 Wrap Text General				÷		E
Paste	B I U	· <u>A</u> · E =		erge & Center *	\$ - % ,	-	Conditiona Formatting	* as Ta
Clipboard 5	Font • fx	G Committee Me	Alignment	(a)		14.		Style
1549					-		100	-
D	E F	G	н		r.	J	К	L
549	1 0 Scouts BSA	1/31/2020 :		m Committee		NO		WS1
550 (1 0 Scouts BSA	1/31/2020 ;		m Committee		NO		WS1
551	1 0 Scouts BSA	1/31/2020	nail.co	m Assistant So	outmaster	YES		
552	1 0 Scouts BSA	1/31/2020		m Scoutmaster	r	YES		
553 Equal 1	Го		2	ant Sc	outmaster	NO	S11, SCO	800
554	at cells that are EQUAL TO:			ant So	outmaster	NO	\$11, SCO	S24
555 M	at cells that are EQUAL TO:			maste	r i i i i i i i i i i i i i i i i i i i	NO	S11	S24
556 Assist	tant Scoutmaster	with Light R	ed Fill with Dark Red Te	xt 👻 ant Sc	outmaster	NO	S11, SCO	S24
557 :				ered O	rganization F	NO		D72
558 :		ſ	OK 🔪 Car	cel ered O	rganization F	NO		D72
559 :		-		ant So	outmaster	NO	S11	S24
560 :	7 Scouts BSA	1/3. 2020 ;	cha _b	W Assistant So	outmaster	NO	\$11, SCO	S24
561	1 0 Scouts BSA	1/31/2020 :		n mmittee		NO		WS1
562	1 0 Scouts BSA	1/31/2020 :	ail.com	n Committee	Chairman	NO		WS1
563 2 7	1 1 Scouts BSA	1/31/2020	gmail.	cc Assistant Sc	outmaster	YES		
564	1 5 Scouts BSA	1/31/2020)m	Scoutmaster	and the second se	NO	\$11. SCO	\$24

- er_Shakori_09(9).csv Microsoft Excel non-commer OB H Inse Page Layou Shapes . A Line * MArea * Line Line A 4 12 e Pie * : Scatter L Column 2 artAr Text Header Clip Slicer Hyperlink Scre 📑 Bar 🔹 🚺 Other Charts 🔹 Win/Loss Sparkli Create PivotTa Choose the data that yo Un gistration Email Position Select a table or range 4/30/2019 i Merit Badge Counselo Table/Range: TrainedLeader_Shakori_09(9)'I\$A\$1:\$M\$597 4/30/2019 c Merit Badge Counselo O Use an external data sou 4/30/2019 j nail.coi Merit Badge Counselo 1/31/2020 | com District Member-at-Lar 4/30/2019 com Merit Badge Counsel you want the PivotTable report to be placed 4/30/2019 b noo.co Merit Badge Counselo New Worksheet 4/30/2019 solutio Merit Badge Counselo Existing Worksheet 4/30/2019 nail.co Merit Badge Counselo Location: 18 1/31/2019 @ nail.co Asst. District Commiss 4/30/2019 9 OK Cancel 1/31/2020 9 @gmai District Member-at-Lar _____ 57 mail.c Merit Badge Counselo C 4/30/2019 c 4/30/2019 I Merit Badge Counselo 1/31/2019 i Roundtable Commissio Jc 55 1/31/2019 t .com Unit Commissioner Ta LOWER HALF n not Morit Re TrainedLeader_Shakori_09(9) 49349720.89 Count: 6175 Sum: 58824867305 100% (-
 - Make a graph or chart of the summarized data (ex. Insert > Bar Chart) From the pivot table data summary, you can create a chart or graph of the summarized data (see below). You can also do this with the data directly from the "Summary Report" (white bar button) on the "Trained Leader Status" report page.

		icture Crip	Shapes Smar		enshot Colun	in Line	Pie Cha	Bar Area	Scatter	Other Charts +	Eine Line Colu Win/ Sparklin	Loss	Slicer
	N2	- (fx					-					
9	A	В		D	E	F	G	н	1		J	К	Ţ
1	Unit	Trained	Not Trained		,	0%	20%	40%	6	0%	80%		100%
3	Crew 0039	6	1		Crew 0039	-	-	6	-		-		
4	Crew 0505	2	4		Crew 0505	-	2		_	-		_	
5	Pack 0039	6	9		Pack 0039	-	6	-		9	_		
6	Pack 0093	6	7		Pack 0093	-	6	-	-		-	_	-
7	Pack 0283	9	1		Pack 0283	-		9	-		-	-	
8	Pack 0328	1	10		Pack 0328	1		-	30	-			
9	Pack 0420	8	10		Pack 0420	-	8		_	-			
10	Pack 0438	9	12		Pack 0438	-	9	-	_	-			
11	Pack 0449	2	7		Pack 0449	2	-	_		17	_		
12	Pack 0467	7	10		Pack 0467	-	7						
13	Pack 0820	1	8		Pack 0820	1		-	8		-		
14	Pack 0825	4	2		Pack 0825	-		4	_		-		
15	Pack 0845	3	4		Pack 0845	-	3			-		_	
16	Pack 0880	11	1		Pack 0880		-	- 2	1	-	-		
17	Pack 0951	3	7		Pack 0951	-	3	_	_	-	-	_	
18	Troop 0009	2	4		Troop 0009	-	2	-			_		
19	Troop 0039	14	10		Troop 0039	-	-	4	-				
20	Troop 0045	26	8		Troop 0045		-	26			-	8	
21	Troop 0059	12	4		Troop 0059		_	12			-		
22	Troop 0093	36	9		Troop 0093	-	-	36	-	-	_	9	
23	Troop 0328	1	12		Troop 0328	1	-	-	-12	-	-		-
24	Troop 0420	4	13		Troop 0420	- 4	-	_		-	_		-
25	Troop 0438	29	6		Troop 0438		1	29		-	-	- 2	-
26	Troop 0449	10	11		Troop 0449		10	-				-	-
27	Troop 0505	8	4		Troop 0505		1	8	_		-	_	-
28	Troop 0820	20	11		Troop 0820	-	-	20	_	-			-
29	Troop 0822	2	5		Troop 0822	2		_			-		-
30	Troop 0835	2	17		Troop 0835	2		_		-	-		
31	Troop 0845	11	7		Troop 0845		-	31		-	-		-
	Troop 0951	18	7		Troop 0951	-		18			-		-
	District Staff	85	26		District Staff		-	-85		-	-	35	-
34	Grand Total	358	247			3							
35							II T	rained	lot Traine	ed			

) + e 🖸	- 📑 🚰 ▼ ∓ TrainedLeader_Shakori_09(9).csv - Microsoft Excel non						PrvotTable Tools		
File	Home	Insert Page Layout	F	ormulas Data	Review	View	Options	Design	a 🕜 🗖 🗗	
1	0 4		1	3	🐻 Clear *		13		Field List	
ivotTable	Active Gro		3U		Select -		Calculatio	1000	+/- Buttons	
*	Field * *	up Z Sort Inse Slice	rt K	efresh Change Data	Kove Piv	otTable	*	*	Field Headers	
		Sort & Filter	_	Data	Action	5	_		Show	
	B4		NO	2						
ží.	А	В	С	D	E F		Pivot	Table Field Li	ist 🔻	
1									id to report:	
2		L						se fields to ac	ld to report:	
		Column Labels *					V U			
		NO		Grand Total				rst_Name		
5 Crew		1	6	7				iddle_Name ast_Name		
6 Crew		4	2	6		1		emberID		
7 Pack		8	5	13				rogram		
8 Pack		8	3	11					piration_Date	
9 Pack		5	4	9			E			
LO Pack		11	3	14 19				osition		
12 Pack		10 9	9	19				rained	adatasu	
13 Pack			3		-		I I			
4 Pack		6	11	12	Drag	1	Ir			
15 Pack		7	11	7	Jiay					
L6 Pack		4	3	7						
17 Pack		4	2	6	and					
L8 Pack		3	8	11	unu			- 1 1		
19 Pack		4	3		1					
20 Troop		4	3	7	Drop					
Troop		19	19	38				fields be vee Report Filer	as below: Column Labels	
22 Troop		8	22	30			N.	Reporting		
23 Troop		2	10	12				•	Trained	
4 Troop		5	34	39						
25 Troop	0328	11	2	13						
26 Troop	0420	15	4	19						
27 Troop	0438	3	24	27				10		
28 Troop	0449	9	5	14						
29 Troop		4	7	11				Row Labels	Σ Values	
0 Troop		8	25	33			Uni	t	Count of Trai •	
1 Troop		6	2	8						
32 Troop		19	3	22			-			
33 Troop		6	6	12			-			
34 Troop		6	16	22			-			
85 Distri			106	133						
6 Gran	liotal	237	359	596				lefer Layout L	Ipdate Update	

• Create a contact or phone list for an event

• And finally, you can copy email addresses for a selected group into some email clients (example: Email just the leaders that need Den Leader training) After sorting to get just the set of email addresses you need, remove any duplicates ("Data"> "Remove Duplicates"), select and copy (Control+c) the entire column of email addresses you want. Open your email client and prepare an email to send. Paste (Control+v) the list of email addresses into a blind copy ("bcc") line. Your email client will usually interpret the celldelimited data you copied into comma-delimited data to paste. For some email clients, you may also need to click "Enter" to get the email client to interpret the comma-delimited list you pasted into separate "bcc" address lines.

• Summarize the data set (ex. Insert > Pivot Table)