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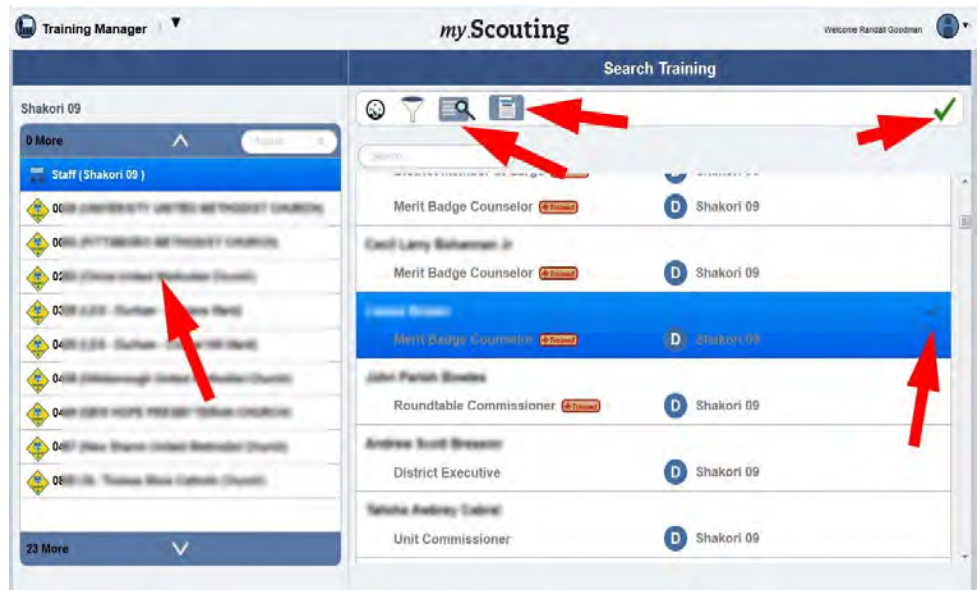
## 2- Add a training course to an individual's training record

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).
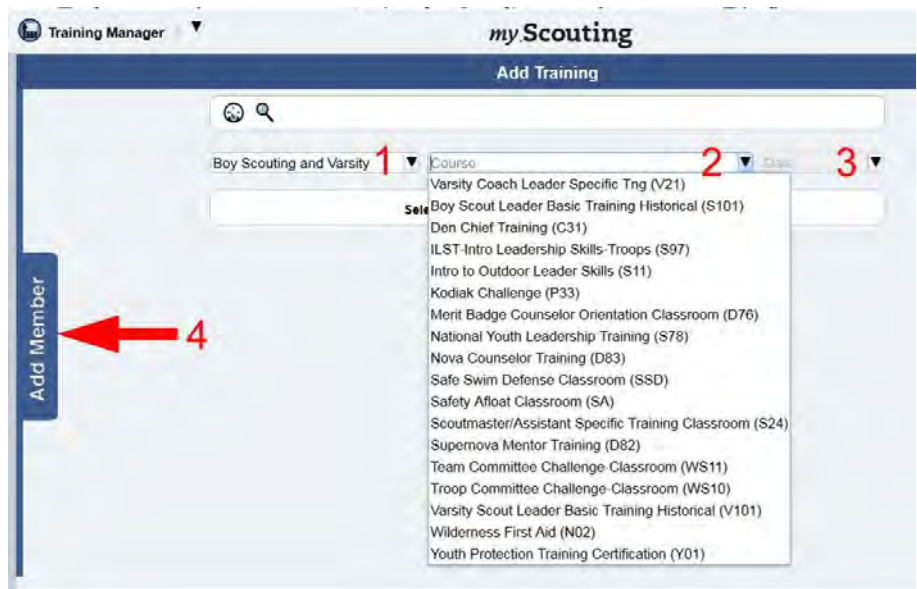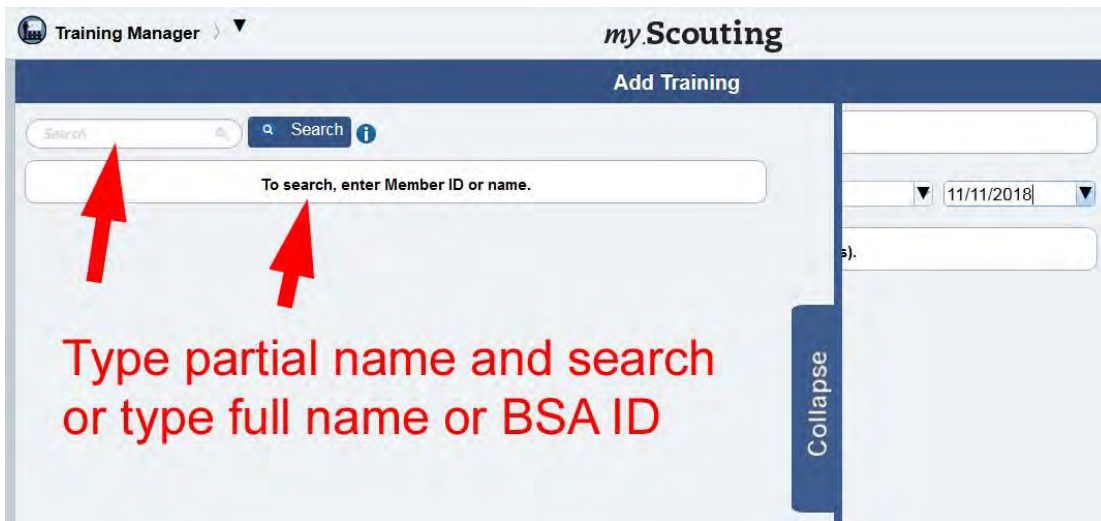
3- Access downloadable Youth Protection Training statistics for your unit

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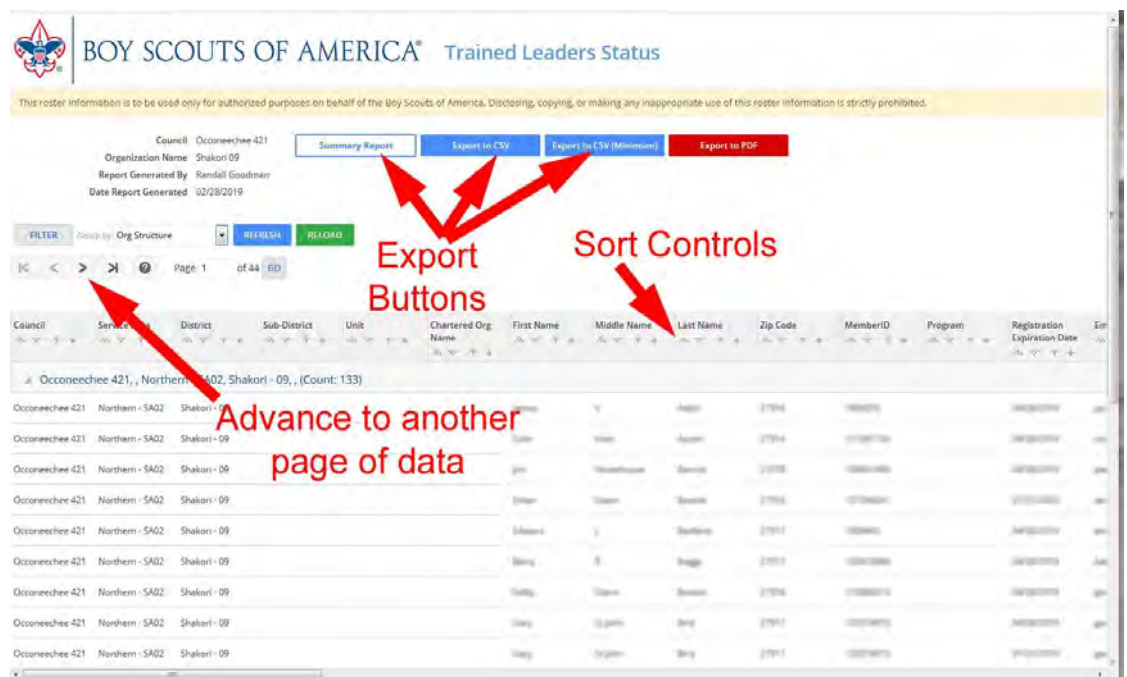
## 4- Access downloadable statistics for other "Position- Required" training courses for your unit's leaders

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, 2-choose "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").
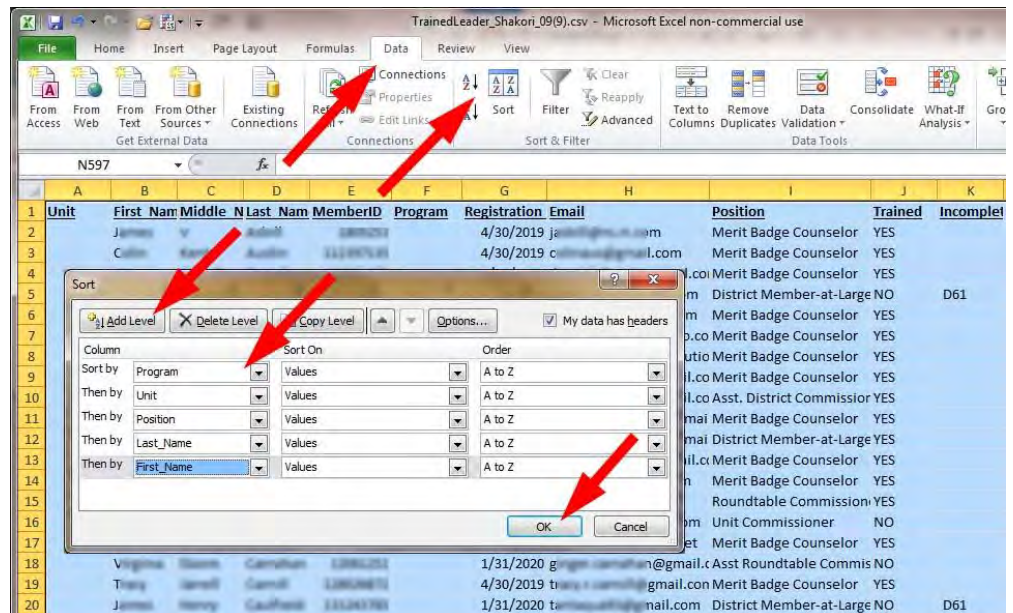

- Highlight useful or interesting data like which leaders' training is about to expire (example: 1-Choose a column of data to selectively highlight, 2-choose the "Home" tab, 3- then choose the "Conditional Formatting" dropdown and, 4- select the "Highlight Cell Rules" and select a formula, 5- In the window select or type in a field value to compare to, 6- choose color to highlight from dropdown, 7- Click "OK"
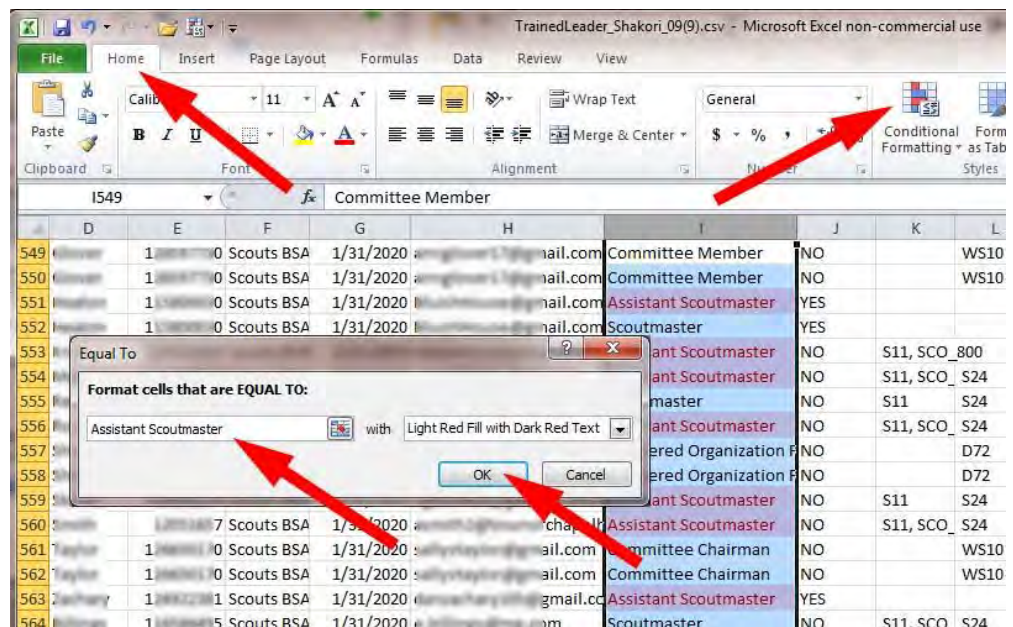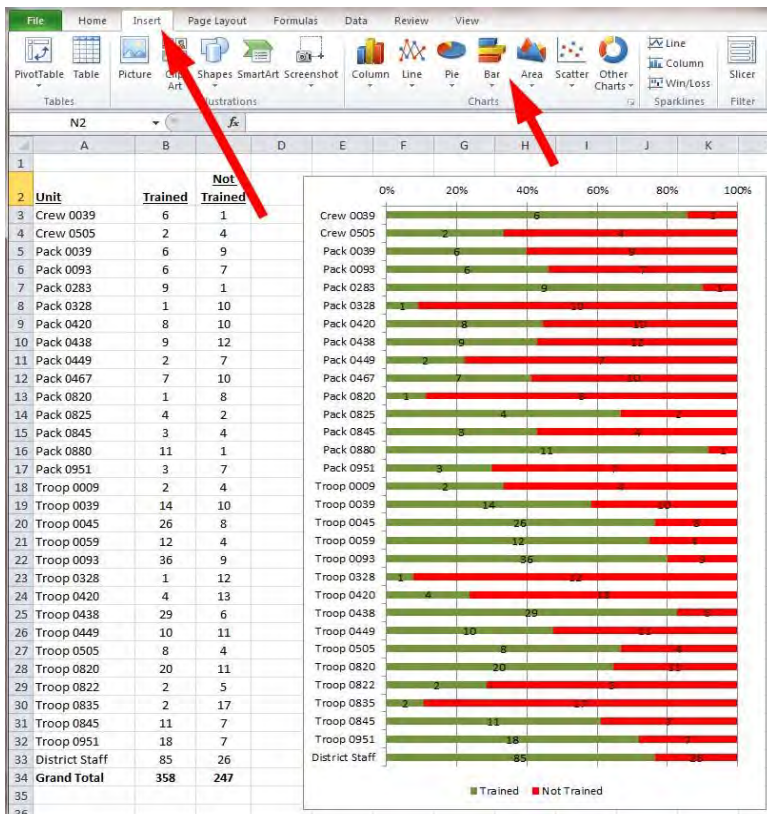
- Summarize the data set   (ex. Insert > Pivot Table)
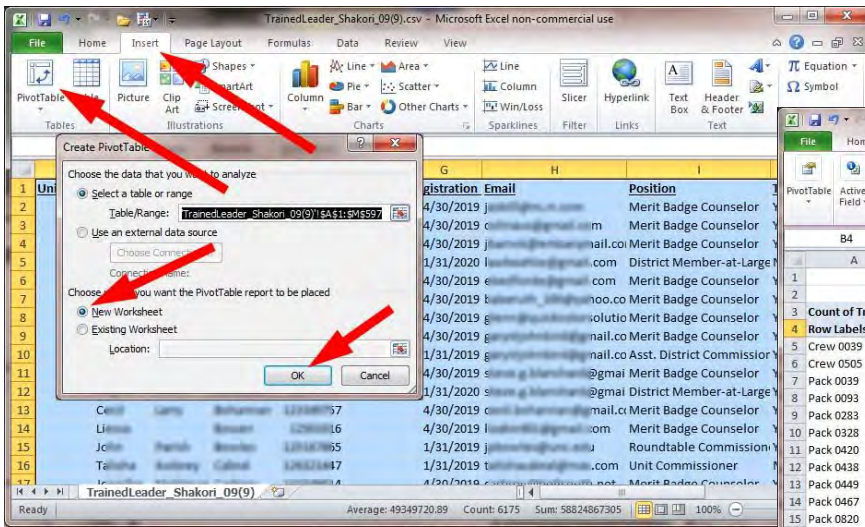
Pivot Table
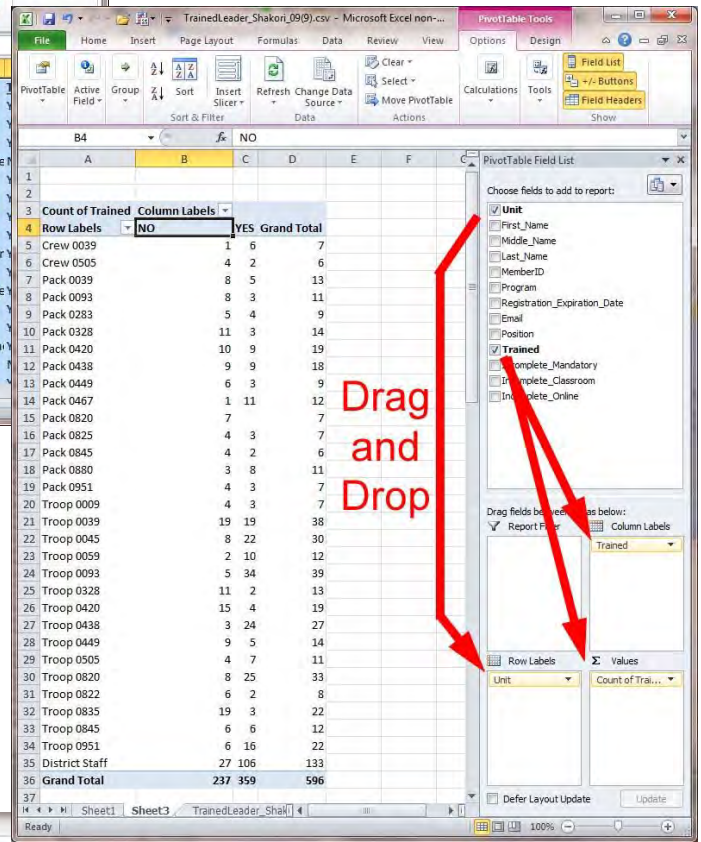
- Make a graph or chart of the summarized data (ex. Insert > Bar Chart)   From the pivot table data summary, you can create a chart or graph of the summarized data (see below). You can also do this with the data directly from the "Summary Report" (white bar button) on the "Trained Leader Status" report page.

- 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 cell-delimited 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.