


MyRoster – Unit Loaded Roster Instructions

MyRoster

Online rosters simplify the registration process for units (especially where an event is collecting a lot of standard information for each attendee) because many of the standard data fields can be populated directly from the roster, rather than having to be typed in. Here is how it works:



- Roster information may be imported from a CSV (comma-delimited) file using the **Import** menu screen or entered manually on the **Manage** menu screen.
- Attendee data is populated by clicking on the  MyRoster icon next to each attendee's name.
- Which event fields fill from the roster?
 - Council Name, District Name, Unit Type, Unit Number
 - First and Last Name, Middle Initial
 - Address, City, State, Zip
 - Home Phone, Work Phone, Cell Phone
 - Gender, Age
 - Rank (youth), Leadership Position (all), and Youth Protection Date (adults)
 - BSA Member Number

Video Tutorial

https://www.youtube.com/watch?v=Njcg80_Dx4&feature=player_embedded

Manage

Use the Manage screen to add new members to your roster or edit or delete existing members.

- Click the **Youth** or **Adult** add buttons to add a new member. Enter as much information as you have, such as name, address, rank, leadership position, etc. The more you enter, the more that will be pre-filled on events that request that information.
- To edit an existing member, simply overwrite their data fields. All changes are auto-saved.
- To delete an existing member, click  on the far left.
- Use **Delete All** in the upper right to delete all members.
- If a member has no  and its Name and BSA Member ID fields are greyed out, then this member was uploaded by the council and you are not able to delete them or change the greyed fields. You are able to change any of their non-greyed fields though.

Import

Use the Import screen to add new members to your roster by uploading them from a CSV (comma-delimited) file.

- Click **Choose File** to select your file.
- Once chosen, map your file's column names to the system's field names by using the dropdown list for each field.
- Fields that are not mapped will not be imported. After mapping each field you intend to import, click the Import File button.
- A message will show you how many members were imported, as well as how many (if any) were rejected.
- Mapped fields and their possible values are:
 - **First Name, Middle Initial, Last Name.** No checks are done on first or last name, and only the first letter of the middle name is imported.
 - **Person Type.** Must be Youth or Adult or Y or A. Anything else is rejected.
 - **Gender.** Can be Male or Female, M or F, Boy or Girl, or B or G. Any non-valid entry or blank defaults to Male.
 - **Email.** Must be a valid email format (someone@something.something). Invalid formats will not be imported.
 - **Address, City, State, Zip.** State must be either full state name or two letter abbreviation. Other values will be ignored. Zip must be numeric.
 - **Home Phone, Work Phone, Cell Phone.** These can include dashes, parenthesis, and periods, or be just numbers.
 - **BSA Member ID.** No validation is done to ensure this is a proper BSA Member ID.
 - **Youth Protection Training Date.** Must be a valid date or it is ignored.
 - **Age.** Must be a number or it is ignored.
 - **School.** Anything is accepted.
 - **Rank.** Rank must match the official BSA names. First Class is acceptable, but 1st Class will be ignored.
 - **Leadership Position.** Leadership Position must match the official BSA names. Patrol Leader is acceptable, but Patrol Ldr will be ignored.

Edit Profile

Use the Edit Profile screen to set up your MyRoster profile information and change your password. Profile data fields such as Name, Email, and Unit are automatically used on the registration contact when starting a registration.

- Simply overtype any field to make changes.
- All changes are automatically saved.
- If unit information is locked (i.e. you can't change your unit number) and the **Change Password** fields are not displayed, then yours is a **council-created** roster. For council-created rosters:
 - You **cannot** change your unit, because this roster was created by the council for a specific unit.
 - You **cannot** change the name or BSA Member ID of any roster member that was added by the council when they created the roster. You **are** able to change the name and BSA Member ID of any roster member that you added.
 - You **cannot** change your password. Only the council office can change the password for council-created unit rosters.