

# TroopMaster

## Users Manual



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# INTRODUCTION

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Thank you for purchasing TroopMaster®, by far the most powerful and popular unit management system on the market! You will soon be joining the many thousands of your fellow Scouters who save time and effort using programs from the flagship of Scouting software, Troopmaster Software, Inc.

TroopMaster offers significant advantages over similar software products:

- TroopMaster was written specifically for Boy Scout Troops by professional software developers, one with over 25 years experience in Scouting, and his son, an Eagle Scout (1986). It “understands” how scout units operate and can track your scouts' progress to provide information that would be impossible on a simple database management system.
- TroopMaster is intuitive and very easy to use. While it takes time to initially enter all of your unit data, maintaining the data from that point will be a breeze!
- Most BSA rules for rank advancement are programmed into the system. For example, Eagle-required merit badges are monitored for you and advancement is not allowed until the minimum requirements are completed. Also, the Participation, Position of Responsibility, 2nd/1st Class Activity, and Service Project requirements are monitored for you and completion dates entered as soon as the respective requirements are complete. TroopMaster will automatically place each scout’s completed merit badges under the appropriate ranks for you.

To get the most from your new software, we recommend the following:

- (1) Read this User’s Manual. It is especially important that you read Chapters [2](#), [3](#), [6](#), [7](#), [15](#), and Appendices [B](#) and [F](#). We also recommend that you read all items that are highlighted using the following conventions:

**Information that is critical to utilizing TroopMaster is displayed as bold, red text within a shaded box.**

Information that requires special emphasis is displayed as black text within a shaded box.

Helpful hints for getting the most out of your system are displayed in green text next to a light bulb icon.

- (2) Backup your data. Don't let a hardware failure force you to start over. See the “Making Backups” Chapter for recommended procedures.

You are now ready to get started. If we have achieved our goal, you soon will be spending less time with paperwork and more time with the scouts who need you! Happy Scouting!

# WHAT'S NEW IN THIS VERSION

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TroopMaster incorporates hundreds of user-suggested improvements! The following is a summary of the major improvements:

- Latest Advancement Changes! The system is now up to date with all of the latest rank advancement changes for the 2008 year.
- Data Security! All personal data is now encrypted, even when stored on your local hard drive. When you backup your data, email your data, or use the DotNet add-on to upload your data to your FTP site, the entire database is compressed and encrypted. No one can decompress or decrypt the data without valid Data Access and Data Encryption passwords that you specify.
- Sensitive data items (e.g., SSNs, driver's licenses, etc.) can now be hidden on reports, and you can block specific users from even being able to see selected data items.
- DotNet users can now be limited to specific functional areas based on Data Access Password assignments. The same functional area can be assigned to more than one leader.
- We've increased the maximum number of adults, MBCs, POCs, awards, activities, user-defined leadership positions, etc.
- The Flag-a-Scout and Flag-Adults options have been replaced with a much more intuitive and flexible "Member Groups" feature. You can create as many groups as you like and give each a meaningful name (e.g., "Troop Committee", "Summer Camp"). You can then select any of these groups when generating reports, sending email, crediting attendance, etc.
- We've added BCC (blind carbon copy), attachment, and default signature options to the email function.
- We've added support for direct SMTP emailing so you no longer need to rely on 3<sup>rd</sup> party programs such as Outlook or Windows Mail.
- We've incorporated adults into the fundraisers and increased the maximum number of products.
- You can now specify expiration dates for adult leader training courses and have those reflected on reports.
- Medical information tracking has been expanded for scouts and adults.
- TroopMaster now tracks and reports scout swimming levels for both scouts and adults.
- You can now attach external documents to scouts and adults and then open those from TroopMaster. For example, you could scan health forms and attach those to your scouts/adults.
- The Star, Life, and Eagle dialogs now show details on service hours remaining, days still needed for the position of responsibility requirement, etc.

- When you credit merit badges you can specify which counselor taught the badge. These details can be included on the Merit Badges Earned report and also as an optional attachment to the *Unit Advancement Report/4403*. (If you don't need this option, you can turn it off through the *Preferences* dialog)
- You can now update merit badge requirements as BSA changes them without affecting scouts who are working on the badge using an older set of requirements.
- You can now track sub-requirements for the Venturing Gold, Quest, and Outdoor Bronze and Ranger awards.
- TroopMaster now supports Sea Scout and Varsity awards, including Varsity Pins!
- For you folks in the Midwest, we've added support for Mic-O-Say.
- Support for LDS units has been expanded. For example, you can now group credit Duty to God requirements. Also, TroopMaster creates Member Groups (see above) for your troop, team, and crew and helps keep them current as scouts move up to the next levels.
- We've added specific support for Unit Resource Survey data to the POCs area.
- Archive files are now always included when backing up your data or emailing your database. If you are using DotNet, archive files are uploaded to the FTP site along with the active database.
- All areas of the program including the reports now have a "Filtered Selection" option that you can use to control what's included on the selection list or report. For example, when working with scouts, you could elect to include just 1<sup>st</sup> Class Scouts and below.
- We've added group credit options for Venturing, Varsity, and Sea Scout awards.
- Functionality has been enhanced on displays and reports for Venturing crews.
- You can now define your own activity "levels" and the maximum number of activities and activity types has been increased. Activities now allow for starting and ending times.
- Camps/hikes can now be designated as "backpacking" events. There is also a separate "backpacking" report, and backpacking can now be counted toward short-term camping for O/A eligibility regardless of camp length.
- You can now define "minimum percentages" for scout attendance for any types of activities and have the *Participation Summary* report flag scouts whose attendance is low.
- Activities have been integrated with the desk reference calendar using colors to differentiate activity types. An activity can be viewed or added by clicking on the desired date.
- You can now generate permission slips or a tour permit directly from an activity dialog.

- Venturers who are 18 and older can now be included as drivers on tour permits.
- Users can now save multiple export formats for repeated use of the same formats.
- You can now optionally include formal names, middle initial, and suffix on member selection lists and reports.
- We've added lots of new reports: *Backpacking Summary*, *Rank Badge Summary*, *Rank Badge Matrix*, *World Conservation Award Application*, *Scout Swimming Levels*, *Scout Training List*, *Adult Training List*, *Adult Training Matrix*, *Unit Training Status*, *MBC Training Status*, Varsity reports, Sea Scout reports, *O/A Election Report*, Mic-O-Say reports. We've also added tons of new options to the existing reports.
- You can now generate "blue cards" (merit badge applications)!
- The Unit Calendar now shows multi-day events.
- TroopMaster will now compute the average time it takes for scouts in your unit to earn each of the ranks. These averages are included on the new *Rank Badge Matrix* report.
- The "Awards Summary" portion of the *Court of Honor* report now optionally includes award order code numbers for your council office.
- The *Eagle Palm Assistance* report is now a facsimile of the official BSA form.
- The individual scout reports can now be emailed to multiple scout/parent email addresses.
- You can now get separate camping totals for non-cabin camping.
- Medical information can now optionally be included on permission slips, and the permission forms can be emailed to your scouts/parents.
- Recharter selections are now saved for up to 60 days. This allows you to save your work and then come back later and pick up where you left off.
- A "Months to Age 18" column has been added to the *Target Eagle* and *Scouts Not Advancing* reports.
- You can now include all scouts on both the *Target 1<sup>st</sup> Class* and *Target Eagle* reports. This allows you to attach the two reports together to create an advancement wall chart.
- Your selections for the *Tour Permit Assistance* report are now saved so that you can make changes later, if needed. Drivers' cell phones can now optionally be included.
- You can now print Merit Badge 'blue cards' applications directly from the system.
- Our new AutoMailer now allows you to schedule email messages and reminders to be sent at a later date.

- You can now save your backup files directly to CD.
- We've added full support for 2 separate email addresses per member.
- Added support for full middle name to better support electronic rechartering and submission of your advancement records.
- Much more! Little surprises abound!

# CHAPTER 1. INSTALLATION

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## 1.0 Overview

The program CD in your package contains the TroopMaster SETUP program. SETUP will create the necessary folders, install the software, and create an empty database. If you are upgrading, SETUP will convert the data from your previous version to the new database formats. SETUP will also install a PDF copy of the User's Manual.

You will need the following:

- (1) Windows 95/98/ME/2000/NT/XP/Vista or newer
- (2) A hard disk drive with at least 20 MB of available disk space. If you also need to install Adobe® Acrobat® Reader, up to 90 MB additional disk space may be needed.
- (3) A printer supported by Windows.

## 1.1 Registering Your Software

During the installation, SETUP will ask you for your unit number (i.e., your troop, crew, or team number), license key, and license expiration date.

If you purchased the software directly from Troopmaster Software, you are already registered. Your unit number, license key, and license expiration date are on a label inside the case that contains your program CD.

If you purchased the software from your council office, you must register the software through TroopMaster Software to obtain a license key. You can install the software without this key but if you do, you can only run the program a maximum of 10 times. After that you must complete the registration process in order to continue using the program. Registration can be accomplished via the "Registration" form on our web site, by email, by phone, or by returning the Software Registration Card. If you email us, please include all of the information from the Software Registration Card, including the software serial number from the top of the card. Regardless of how you initially register, you must also return the Software Registration Card since that is your proof-of-purchase. Only one leader with your unit should register—we only track one point of contact per unit.

If you don't obtain your license key until after installing, start TroopMaster, click on the word "Unregistered" and enter your unit number, license key, and license expiration date in the pop-up registration dialog. If you try to run an unregistered program after the trial period has expired, you will be taken directly to the registration dialog.

To reregister the software to a new leader, please call or email us with the name, mailing address, and email address of the new point of contact.

Once activated, license information can be viewed through the *Help>License Details* dialog.

## 1.2 Installing TroopMaster

SETUP will ask you to specify folders for your new software and database. We recommend using the default folders but you can modify those, if desired.

We do not recommend using a removable media (e.g., usb drive) as the primary location for your database. Removable media are not nearly as reliable as a hard drive.

If you are upgrading from an earlier version of TroopMaster and have existing data that needs to be converted to the New TroopMaster data formats, please read para 1.3 before proceeding.

To install TroopMaster, insert the program CD into your CD-ROM drive. The installation menu program should launch automatically. If it does not, follow the steps below:

- (1) Click the **Start** button and then select “Run”.
- (2) Click the browse button and navigate to the SETUP.EXE file on the CD-ROM drive.
- (3) Click **Open**.
- (4) In the Run dialog box, click **OK**.

Follow the instructions provided on the screen. When the installation is complete, remove the CD and store it in your CD case.

The full Users Manual will be installed on your computer in PDF format. You must have Adobe Acrobat Reader 4.0 or newer installed on your computer in order to view the manual. In case you don't have Acrobat Reader, SETUP will offer to install a copy.

## 1.3 Upgrading from a Previous Version

During the installation, SETUP will ask if you are a new user or upgrading. This information is necessary because if you are upgrading and your existing data is in a previous version format, it must be converted to the new TroopMaster database formats. SETUP will convert data from TroopMaster 2000 or newer.

If two or more leaders with your unit were running the old version, only one of them should select the “upgrading” option during installation. The others should install as “new users” and then restore a backed up copy of the converted database created by the one leader who upgraded and converted the data from the old version. The only reason to select the “upgrading” option during program installation is if you have earlier version data to convert.

Archived data is converted at the same time as the active unit data. If you have more than one archive and not all of them are on the same computer, please see the second note below. If after installing, another archive from the earlier version turns up, you can convert that separately using the “Data Conversion Program” option on the “TroopMaster” program group, which can be accessed through the Windows **Start** button.

If your troop has been using the distributed database feature, you must merge all of your satellites before installing TroopMaster and converting your data. NOTE: This feature is also being phased out of the program so that we can provide better support for our DotNet add-on and other new features being added to the system.

If more than one leader has been deleting/archiving scouts and adults, you may have different archives located on different computers. This is especially likely if your unit was using the DotNet add-on because archive(s) were not part of the web database. The TroopMaster installation program will convert archive(s) as well as your active data but in order to be fully successful, all of the archives must be on the same computer where the conversion takes place. You should therefore consolidate all of your archive(s) on one computer before installing. This may involve retrieving scouts/adults from one archive and then re-archiving them to another archive.

Please do not install this new version into the same folder you used for the previous version.

Installation of TroopMaster will not delete or modify earlier TroopMaster versions. You should retain the earlier version for several months until you are certain that all of your previous data was converted properly. After that, you can safely uninstall the earlier version. However, we recommend that you retain backups of your previous data and archive files. Please remember that in earlier versions, your archive(s) had to be backed up separately.

If your data is already in the New TroopMaster format (i.e., you converted the data during a previous TroopMaster installation or one of the other leaders with your unit converted the data), you should install as a “new user” and then restore the New TroopMaster data through the “File>Restore Database” menu option.

## 1.4 Starting TroopMaster

Either double-click the desktop icon or click the **Start** button, select “Programs,” highlight the TroopMaster folder, and click the TroopMaster icon. If you are the administrator you can define data access passwords by going to File>Database Management Passwords. An administrator password can be created by replacing the word ‘admin’ with your own password. If you are not the administrator you may be prompted for your data access password when you restore data files or while downloading from DotNet.

**Please read para [3.15](#) regarding the definition/use of Database Access Passwords.**

## 1.5 Reinstalling TroopMaster

If you previously installed TroopMaster and need to reinstall it or if you want to install it on a second computer, you’ll need a backup of the unit database. This can be obtained using the *File>Backup Database* option.

Run the installation as described above and select the “New User” option. When the installation is complete, start TroopMaster, enter your Data Access Password, and select the *File>Restore Database* option.

## 1.6 Updating/Upgrading TroopMaster

We will periodically update the software with both bug fixes and enhancements and when we do, we will produce a program update patch (e.g., V4.01, V4.02, etc.). The free program update patch will be posted at the bottom of the TroopMaster product page on our web site. To see if you need an update, select the **Help>About** option to see which version of the software you are currently running. Then, click the “Check for newer version” hyperlink at the bottom of the dialog, which will take you directly to the latest patch on our web site. Compare the version you have to the version of the patch. If your version is older, please download and install the update patch. For guidance on downloading and installing a patch, please see the [FAQ's](#) page on our web site.

When you click on the patch, we recommend that you select your browser's “Run” or “Open” option instead of downloading the patch to your hard drive. If you do download the patch, please do not save it into the main program folder because you might inadvertently overwrite the TroopMaster program.

Major new versions (e.g., V5.00) of TroopMaster are also free as long as your [software license](#) remains current. When a major new version is released, you will be provided a link from which you can download a free copy of the new version. If you would also like to receive the new version on CD, you can get that for only \$5 plus shipping/handling.

## 1.7 Moving TroopMaster to Another Computer

If you purchase a new computer or if you turn over your responsibilities to a new leader, you should first install TroopMaster and the most recent update patch ([para 1.6](#)) on the other computer. Then, transfer the database through the **File>Backup Database** and **File>Restore Database** menu options.

# CHAPTER 2. USING TROOPMASTER

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## 2.0 Overview

This Chapter covers the “basics” you need to operate your new unit management system. TroopMaster is intuitive and very easy to use. However, reading this Chapter first will save you time.

## 2.1 Main Menu

There are ten main options on the Main Menu: File, Activities, Adults, Advancement, Fundraisers, Mic-O-Say, O/A, Reports, Scouts, and Unit. There is a separate Chapter in this Users Manual corresponding to each of these menu options. Within each Chapter, there is a subsection for each option on the associated pull-down menu.

## 2.2 Tool Bar

A tool bar is available to provide faster access to the most frequently used features in TroopMaster. The following list identifies each of the tool bar buttons from left to right along with the equivalent menu path.

<b><u>Button</u></b>	<b><u>Icon Description</u></b>	<b><u>Menu Equivalent</u></b>
Backup	Diskettes with letter “B”	<i>File&gt;Backup Database</i>
Restore	Diskettes with letter “R”	<i>File&gt;Restore Database</i>
Notepad	Notepad and pencil	<i>File&gt;Notepad</i>
Email	Envelope and Earth	<i>File&gt;Send Email Message</i>
Calendar	Desk calendar	<i>Activities&gt;Activity Calendar</i>
Adult Management	Man’s face	<i>Adults&gt;Adult Management</i>
MBC Management	Citizenship in Nation MB	<i>Adults&gt;MBC Management</i>
POC Management	Rolodex	<i>Adults&gt;POC Management</i>
Activity Management	Camping tent	<i>Activities&gt;Activity Management</i>
Fundraisers	Fleur-de-lis w/dollar signs	<i>Funraisers&gt;Sales &amp; Payments</i>
Advancement	Yellow Fleur-de-lis	<i>Advancement&gt;Individual Scout</i>
Scout Management	Boy’s face	<i>Scouts&gt;Scout Management</i>

## 2.3 Backups

Backing up your unit database is extremely important because this data represents a major investment of your time. Don't let a hard drive failure force you to reenter everything from scratch. Please see [Chapter 14](#) for recommended procedures.

**The *File>Backup Database* option in conjunction with the *File>Restore Database* option can be used to transfer the unit data and archive files from one computer to another. However, all of the unit's data on the target machine will be overwritten by the data restore option.**

## 2.4 System Date

TroopMaster gets the date from your system clock and uses it extensively throughout the program. The date is especially important to the automatic crediting functions. Please ensure your system date is correct before starting TroopMaster.

## 2.5 Data Entry Dialogs

The cursor can be positioned to or within any data entry field with your mouse. Press TAB to move to the next data entry field or Shift-TAB to move to the previous field. Pressing ENTER activates the highlighted button.

Please do not make data entries with Caps Lock on. Doing so makes it very difficult for TroopMaster to fit your entries on displays and reports. Even worse, it can cause ScoutNET processing of your council reports to fail.

To facilitate collecting data on your scouts and adult leaders, several data collection forms are available. There are personal data collection forms for your scouts, adults, merit badge counselors, and points of contact as well as an advancement data collection form for your scouts. Copies of these can be printed through the ***Reports>Forms*** option.

The ***File>Preferences*** option has fields for you to enter the city, state, zip code, and area code common to most of your scouts and adults. Your entries here will be used as the defaults whenever you add a new scout or adult to the database.

Most items on the various data entry dialogs are self-explanatory. For others, holding the mouse pointer over the field label will display an expanded description.

## 2.6 Dates

Dates can be entered in a variety of formats using slashes, dashes, or periods as separators or by typing a six-digit date with no separators. The following entries are equivalent: **09/06/08**, **9/6/08**, **9.6.08**, **9-6-08** and **090608**. If you omit the year (e.g., **9/6**), TroopMaster will automatically append the current year. You don't need to enter 4-digit years. TroopMaster internally appends the century based on context logic. Context logic is applied even if you do enter a 4-digit year (e.g., if you enter a rank requirement completion date of 4/4/1908, it will be saved as 4/4/2008, since "1908" in that context is an obvious error).

In addition, some date fields (mostly in the advancement area) allow special entries. This is done by typing a single character in the first position of the date field:

- a. Complete. Enter a **C**. Available only in the O/A and scout advancement areas, this is used to show completion of a requirement when no specific date is available.
- b. N/A. Enter an **N**. Available only in the scout advancement area, this is used to mark a new requirement that BSA added after the scout completed that rank.
- c. Old Rules. Enter an **O**. Available only in the scout advancement area, this option can be entered for any item under 1st Class and below. If a scout completed a rank under the old Skill Awards (pre-1989), use this option to mark completion of the newer requirements.
- d. Same Date. Enter an **L** or **S**. TroopMaster will repeat the last date entered.
- e. Today's Date. Enter a **T**. This option is available in all date fields.
- f. Transfer. Enter an **X**. Available only in the O/A and scout advancement areas, this option is used to show that a scout completed a requirement with his previous unit and you don't know the exact date.

Actual dates (MM/DD/YY) are required for awards, merit badges, and Boards of Review.

TroopMaster no longer has a "Waived" option because BSA no longer allows some of the swimming requirements to be waived. Instead, they now offer alternate requirements.

There is also a pop-up menu to assist you in date entry. Simply right-click the date field and you can then choose to copy/paste a date, select today's date, repeat the same date you previously entered, or select a specific date from a pop-up calendar.

You can increase (decrease) and existing date by one day by positioning the cursor in that field and pressing the plus (minus) key.

## 2.7 Modifying Date Entries

To change the completion date on an award, merit badge, or training course that has been added to a list box, double-click the entry and enter the new date in the pop-up window.

## 2.8 Saving Changes

Clicking the **OK** button always saves data entries. Click **Cancel** to exit a data entry dialog without saving your changes.

## 2.9 List Box Selection

- a. Single Selection. In addition to highlighting the desired item and clicking **OK** or **Select**, single-selection list boxes allow you to simply double-click the item. Double-clicking will immediately execute the request unless additional information is needed.
- b. Multiple Selection. Some (but not all) list boxes allow you to make multiple selections. For example, when crediting group advancement, you can select multiple names from the list of scouts. To select more than one item from a list box, hold the CTRL key down while you click the desired items with the mouse. To select a contiguous group of items, click on the first item desired; then, hold the SHIFT key down and click the last desired item in the group.

You can distinguish multiple selection list boxes by the field label. For example, if more than one activity type can be selected, the label will say, “Select type(s)”.

One way to move quickly to the desired point in a long list of entries is to move the focus to the list box and then start typing the name of the desired item. For example, type **WH** while the focus is on a list of merit badges to move directly to “Whitewater”.

## 2.10 Quick Access Buttons

Numerous dialogs include quick access buttons that enable you to move quickly to related dialogs. For example, when on an adult’s personal data dialog, quick access buttons let you to jump to the adult’s awards, training, leadership, or O/A dialogs.

## 2.11 Family Links

All of the scout and adult personal data dialogs have “link” options that let you link family members together. Once this is done, all common data items between the records will be updated whenever any record is updated. Because it is very important that you understand how these work, we strongly recommend that you read [Chapter 15](#).

## 2.12 Filtered Selection

We recognize that your database may be large and that the standard options on reports and selection lists may not sufficiently limit the members who are included. To give you more control, TroopMaster provides “Filtered Selection” options on many displays and reports. For example, on the *Scout Management* dialog, the “Display” drop-down box lets you control which scouts are displayed on the selection list. In addition to being able to limit the selection list to a specific patrol, you can also choose the “Filtered Selection” option. Choosing this option displays a dialog that provides very flexible selection criteria. For example, using this dialog, you could limit the display list to, say, specific rank(s) or leadership position(s). You can select any combination of the available filter options.

There are filtered selection dialogs available for scouts, adult leaders, merit badges counselors (MBCs), and points of contact (POCs). A specific description of each of these dialogs follows.

- a. Adults. The filter dialog allows you to select one or more leadership positions. Checkboxes allow you to limit the report to leaders, non-leaders, or just O/A members. Click the **Select Member Groups** button to select one or more groups created through the *Unit>Group Members* option ([para 4.4](#)). You can even use the filter to search for specific text within the “Remarks” fields on your adult leaders’ personal data dialogs.

Click **Reset Filter** to clear all of your selections. Uncheck the “Activate Filter” checkbox to turn the filter off.

- b. Scouts. The filter dialog allows filter based on specific rank(s) or patrol(s) and/or via an “O/A Members” checkbox.

Click the **Select Member Groups** button to select one or more groups created through the *Unit>Group Members* option ([para 4.4](#)). You can even use the filter to search for specific text within the “Remarks” fields on your scouts’ personal data dialogs.

Click **Reset Filter** to clear all of your selections. Uncheck the “Activate Filter” checkbox to turn the filter off.

- c. Merit Badge Counselors. The filter dialog provides a range of options, including limiting the list to counselors who teach a specific badge. Checkbox options allow you to limit the list to “active” or “inactive” counselors. The “Zip Code” field enables you to look for counselors within a full or partial zip code. For example, an entry of “229” would retrieve counselors in zip codes 22901 through 22999.

The “Certification” block lets you retrieve counselors whose “Recertification” date falls within a specific from-to period. Entering a “From” date without a “To” retrieves all counselors certified on or since that date, while entering a “To” date without a “From” retrieves all counselors last certified on or earlier than that date. You can optionally include counselors who have no certification date.

You could use the certification “To” option when generating personal data reports, mailing labels, envelopes, or email messages for counselors who need to be recertified.

Click the **Select Member Groups** button to select one or more groups created through the *Unit>Group Members* option ([para 4.4](#)). You can even use the filter to search for specific text within the “Remarks” fields on your counselors’ personal data dialogs.

Click **Reset Filter** to clear all of your selections. Uncheck the “Activate Filter” checkbox to turn the filter off.

- d. Points of Contact. If you have defined categories ([para 8.3b](#)) and assigned POCs to them, you can select one or more categories. The “Skills/Interests” block lets you retrieve POCs who match any or all of the specified entries. Click the **Select Member Groups** button to select one or more groups created through the *Unit>Group Members* option ([para 4.4](#)). You can even use the filter to search for specific text within the “Remarks” fields on your POCs’ personal data dialogs. Click **Reset Filter** to clear all of your selections. Uncheck the “Activate Filter” checkbox to turn the filter off.

## 2.13 Data Entry Guidelines Regarding ScoutNET

TroopMaster produces advancement, recharter, and additional enrollment reports in a format compatible with your council’s ScoutNET computer system. However, there are several steps that you can take that will reduce errors during automated processing of these reports:

- 1) Don't enter data with **Caps Lock** on, particularly when entering names. ScoutNET expects the first letter to be capitalized and the remainder to be lower case. Obviously, names like “Van Dam” are exceptions.
- 2) Don't punctuate any information, especially addresses and abbreviations. For example, instead of *St.* enter *St*; instead of *Apt #22-B* enter *Apt 22B*; etc.
- 3) If a person has a name prefix (e.g., “Dr”), don't enter that in the first name field--just enter the first name. TroopMaster only tracks prefixes for Points of Contact. Also, TroopMaster has separate fields for “First Name” versus “Nickname”. Enter the formal first name in the “First Name” field. Enter a suffix (e.g., “Jr”) in the “Suffix” field, not the last name field
- 4) Don't enter driver's license number and expiration date in the driver's license number field because the expiration date will cause ScoutNET processing of your report to fail.

We recommend adding the name, phone, and/or email address of a point of contact to your ScoutNET reports so the registrar will know whom to contact if there's a question/problem.

On data entry dialogs, ScoutNET-required data items are marked with green field labels.
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## 2.14 Data Protection and Privacy

TroopMaster provides several features to help protect your data from unauthorized people. For example, personal data is always encrypted when saved to your hard drive. This helps prevent someone who is not authorized to use the program or not authorized to view certain data items from viewing personal data with some other software program outside of TroopMaster.

In addition, whenever you use TroopMaster to backup your data ([para 3.1](#)), email your data ([para 3.4](#)), or upload your data to an FTP site via the DotNet add-on ([para 3.16](#)), the data is compressed into small backup files, which are then encrypted. If you do not create a Data Encryption Password, then the data is encrypted using a default, internal password. However, anyone with a current copy of TroopMaster can decrypt and decompress any of these files. Because of that, we strongly encourage you to create a Data Encryption Password ([para 3.16b](#)). Once you have created a password, no one can decrypt or decompress your backup files without having this password.

Regardless of whether or not you create a Data Encryption Password, neither the ***File>Restore Data*** menu option nor the DotNet add-on feature will work unless the user has a valid Data Access Password ([para 3.15](#)).

TroopMaster also provides a method ([para 3.15](#)) for you to hide certain sensitive data items (such as social security numbers and dates of birth) from certain users. For each Data Access Password, you can specify which sensitive data items, if any, that you want leaders with that password to be able to access. Any items not checked will be hidden from those leaders on displays and reports. Of course, the database administrator always has access to all of the data items.

We also recognize that you may want to generate “sanitized” reports that, for example, can be posted on your unit’s web site. To accommodate that, TroopMaster provides a method ([para 3.17e](#)) for hiding sensitive data items when generating reports. Any items you select can still appear on displays but not on reports.

If you want to set up a single computer (e.g., at the scout hut) and allow different people to log on with different levels of access ([para 3.15](#)), install the program and database and then check the “Prompt for Data Access Password on startup” checkbox ([para 3.17](#)) on the ***File>Preferences*** dialog.

# CHAPTER 3. FILE

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## 3.0 Overview

This menu provides a group of miscellaneous utilities. It includes such things as file backup/restore, data import/export, database management, and archive access.

## 3.1 Backup Database

This option allows you to backup your active data and archived files. You can backup to a diskette, to a zip cartridge, to a CD, or to another directory on your hard drive. Either enter a destination path or use the **Browse** button to select a backup location. All of your active unit data and archive(s) will be included in the backup.

TroopMaster will compress your data and archive into much smaller backup (\*.bak) files. Please do not rename these files. Optionally, it will attempt to do the same with your scout/adult photos. However, photos do not compress as well as data so they require a lot more space. If your photos backup will not fit on a floppy diskette, you will either need to use a larger medium, such as a zip cartridge, or turn the photos option off.

## 3.2 Open Archive Files

To review your archive or to print a report on a scout or adult who has been archived, select this option. Since it's possible to have more than one archive, TroopMaster will ask you to select the desired archive. The default choice will be the archive you most recently accessed. TroopMaster will then load the selected archive and change the window title to remind you that you are in the archive. Options not available in the archive (e.g., *File>Activities*) are deactivated. See [Chapter 13](#) for more information on using the archive.

The menu option name will change to "Open Active Unit Data." When you have finished reviewing your archive, select this option to switch back to your active data files.

## 3.3 Restore Database

This option enables you to restore your database from a backup made through the *File>Backup Database* menu option ([para 3.1](#)). The file names will be "TM4Data.bak", "TM4Archive.bak", "TM4DataPhoto.bak", etc. All of your active data and archive(s) will be restored. Check "Restore files" to restore any user-defined files, such as member groups, recipient groups, custom report definitions (such as general purpose worksheets you've saved), etc. If you want to delete existing user-defined files before restoring the ones in the backup, check the appropriate box.

You cannot restore data from a database backup without a valid Data Access Password. In addition, if an encryption password was in effect when the backup was created, you must also have that. Please see [para 3.15](#) for more information on the use of passwords.

Enter the path to your backup or browse to the desired folder and then click **OK**. To help ensure that you are restoring from the correct backup set, TroopMaster will display the date on which the selected backup was created.

**“Restoring” data is a critical operation. If the backup files are damaged, that damage will be transferred to the files on your hard drive, making some or all of those unusable. Before restoring a database backup, you should backup your existing database to a different diskette or hard drive folder. This will allow you to recover if the restored data is damaged.**

## 3.4 Email Database

If more than one unit leader is using the software, you will need to periodically provide database updates to the other leaders. This option makes it easy to email the database so that you don’t need to hand deliver it. Simply select the desired recipient(s) and click **Send**.

TroopMaster will compress your database into much smaller backup files, attach those to the message, and send your message. The recipient will need to save the message attachments to a hard drive folder, and then restore the backed up files via the *File>Restore Database* menu option (see above). Please see para 3.5 for more information on sending email messages.

## 3.5 Send Email Message

There are several ways to initiate email from within TroopMaster. For example, you can select this menu option, click the email tool bar button, or click the email button with any report displayed.

You can also send an email message to an individual recipient by clicking the “Email” button next to the member’s email address on his personal data dialog.

If you plan to send carbon copies, you should first select the carbon copy (“CC”) or blind carbon copy (BCC) option, as desired. Before using BCC, you should ensure that the email program you are using has that feature.

Next, select the desired recipient(s) for your message. First, click the “Display” drop-down list to choose the desired group (i.e., scouts, adults, parents, etc.) From each group, highlight the recipient names and then click **To** or **CC/BCC** to add the selected names to the primary addressee (i.e., “To”) list or the CC/BCC list. You can select names from as many of the different groups as you like. If you need to email someone who is not in the database, enter that email address in the “Other” field. To remove a recipient that was added in error, highlight the name and click **Remove**. If you want TroopMaster to review all of your recipients and remove duplicate addresses (for example, a husband and wife with the same address), check the associated checkbox.

Enter the subject of your message in the field provided. TroopMaster provides a limited “Body” field where you can enter text for your message. However, your email system provides a much larger text field as well as extensive editing and formatting options. To take

advantage of those features, click the “Display message prior to sending” checkbox. Then, when you click **Send**, TroopMaster will activate your email system, which will display your new message. This gives you a chance to refine your message before it is transmitted.

To attach one or more files to your message, click the **Attach Files** button and browse to the desired file(s).

Clicking the Email Options button on this dialog will display a dialog with several options from which to choose. Email from the program can be sent using either direct SMTP or through a MAPI compliant email system that uses the SMTP protocol. If you would like to use the direct SMTP (recommended), you should contact your internet service provider (e.g., AOL, Earthlink, etc.) for the correct settings to their mail server. If you’re not sure if your email program is MAPI compliant, or if you do not know your SMTP settings, contact your internet service provider.

When sending an email using MAPI (send through 3<sup>rd</sup> party software, e.g., Windows Mail, Outlook, etc.) TroopMaster uses the mail system that is currently set up as the Windows default. This setting cannot be changed from within TroopMaster but can generally be set in your individual email program (through the Tools>Options menu). You can also select the default mail system using Internet Explorer and viewing the Tools>Internet Options>Programs tab.

Some email programs have a security feature that warns you if another program (such as TroopMaster) adds a message to your “Outbox”. You may get this warning if you did not check the “Display message prior to sending” checkbox. Some of these email programs will allow you to turn these warnings off.

The Display Messages Prior to Sending option is only active if using the MAPI interface. When sending messages through direct SMTP, TroopMaster acts as the email editor for your messages.

a. Save Recipient Group. Often, there is a specific group of people to whom you send messages on a regular basis. This option makes it easy to create as many different groups as you need. To save a selected group of recipients for use again later, add all of the desired names to the “To” and “CC/BCC” lists, and then click the **Save Recipient Group** button. Next, enter a unique group name and click **OK**. Recipient groups that you have defined are available through the “Display” drop-down list. To modify a recipient group, select it, make the needed modifications, and then re-save it. To delete a recipient group, select it from the drop-down list and click the **Delete Recipient Group** button.

b. Email Options. Click this button to adjust your email setup options.

- a. Direct SMTP – Use this option to send email from TroopMaster directly through your internet provider’s mail server.. You will need to obtain the SMPT Server, User Name, Password, and Return address information from your internet service provider. If User Name and Password are required by your provider, these fields must also be entered.
- b. MAPI (send through 3<sup>rd</sup> party software, e.g., Windows Mail, Outlook, etc.)
  - (1) Build Message Using – If your email system cannot handle names and email addresses, select the “Email address only” option.
  - (2) Retain Email Session – If the first message you send after starting TroopMaster works but subsequent messages fail, checking this box usually corrects the problem.
  - (3) Omit ‘SMTP’ – TroopMaster usually prefixes each email address with “SMTP:” although this is generally hidden from the user. If you can see this prefix and it’s causing error messages within your email system, checking this box will correct the problem.
  - (4) Default Signature. If you want TroopMaster to add a default signature to your email messages, check this box and enter the desired signature block.

### 3.6 Schedule Email Messages

Use this feature to schedule messages to be sent at a later date using our new AutoMailer.

- a. Add. Click ‘Add’ to schedule a new email. On this dialog you will be able to select the recipients for your message as well as to specify the subject and compose the body text of your message. (See [para 3.5](#)). You will also specify the date/time that you wish your message(s) to be sent.
- b. Edit. To edit an existing scheduled email select the message you want to edit then click the ‘Edit’ button
- c. Delete. To delete an existing scheduled email, select the message you want to delete then click the ‘Delete’ button.

Use of the email scheduling feature requires the direct SMTP option. You may enter the SMTP settings for your mail server by clicking the Email Options button. If you do not know the correct settings for your mail server, please contact your internet service provider.

Scheduled messages are sent by a separate program (TSI-Autemailer). The default settings will load this program automatically when you start your computer. If the Autemailer program is not running, any scheduled messages will not be sent for you. You can start the Autemailer manually by clicking Start>All Programs>TroopMaster>AutoMailer. You can open the AutoMailer program and view any scheduled messages waiting to be sent by clicking the TSI-Autemailer icon in your Windows System Tray. Although your

scheduled message may only be created/edited in the TroopMaster program, you can view the date, time and other details for each message that you currently have scheduled. Sent messages are automatically removed from the list. If there were any problems sending a particular message, it will be flagged with an asterisk. You can click the View Log button to see more information on sent/failed messages.

## 3.7 Export

There are two main export options.

- a. ASCII Delimited. Many people like to design custom reports or to use unit data for other purposes. For example, having access to the scouts' names and addresses could allow you to create mail/merge documents with your word processor.

To facilitate that, TroopMaster allows you to export data from virtually any area of the database. The data is written to delimited ASCII files using any delimiter you choose. Most of the time you will want to import the data into a database management system or spreadsheet so that you can manipulate the data, design reports, etc.

The default delimiter is a comma but you can change that to any character desired. To create TAB delimited files, enter **T**. If you would like to have the names of the data items you select to appear in the first line of the export file, check the associated checkbox. If you will be exporting dates, select the desired format.

Then, select the area (e.g., scout data, adult data, activities, etc.) of the database from which to export data. TroopMaster will display a list of data items from that area in the “Available Fields” list box. You can then select the specific data items you want and add them to the “Fields to Export” list box. To do that, highlight the desired fields and click **Add**. If you want all of the data items, click **Add All**. To remove an item that was added in error, highlight the item and click **Remove**.

If you are exporting merit badge counselor data for import into our MBCounselors program, there is a button at the bottom of the dialog that will set the correct export format for you.

If you use a comma as the delimiter, check the “Include field names” option, and save the export file with a “CSV” extension, you’ll be able to open the export file directly in Excel and your field names will be column headers

When you have finished selecting all of the desired data items, review the order of the items in the “Fields to Export” list. This is the sequence order in which these fields will appear in the export file. If you need to change the sequence, highlight the field that needs to be relocated and click the **Move Up** or **Move Down** button.

- (1) Filtering Activities. If you are exporting activity data, you can optionally limit the export file to a specific activity type. If you want all activity types, select that option

from the drop-down list. If you only want activities that fall within a desired time period, enter the desired “Start-End” dates.

- (2) Filtering Scouts/Adults/MBCs/POCs. If you are exporting member data and you wish to limit the export to specific group of members, use the “Members” dropdown list to selected the desired group or choose “Filtered Selection” to limit qualifying members.

If you think you may want to use this same export file format again, click the **Save** button, assign a name to the current export format, and click **OK**. Then, the next time you need to use this format, you’ll be able to select it from the dropdown list. To delete a format that you no longer need, select it from the list and click **Delete**.

You are now ready to create the export file. If you wish to view and/or print a copy of the file format, click the **View Export File** button. When finished, click the **Export** button. TroopMaster will display a *Save As* dialog that allows you name the file and select the target folder.

- b. Automated District Management System (ADMS). These options let you transfer data on your unit to your district leader if he is using the ADMS program from Troopmaster Software, Inc. There are two export options.
  - (1) Unit Information. This allows you to provide routine updates on your unit to the district leader. The export file includes basic personal data on your scouts and adult leaders as well as advancement summary data for each scout and training/awards data on adult leaders. It also shows camping history (i.e., campout dates) for the current year. Optionally, you can choose to export all adults, just those with leadership positions, or just the adults you last chartered. If your official unit number differs from the one in the software, please change that before creating the export file.
  - (2) MB Counselors. This option provides a one-time transfer of data on your MBCs to your district leader for import into his ADMS program. The export files will add your counselors to the ADMS database; it will not update data on counselors already in the ADMS database.
- c. SOAR. Use this feature to create an export file for units hosting websites on S.O.A.R. This new feature can automatically create the necessary export file to repopulate your membership and specific advancement information on a SOAR website. If you would like more information on SOAR or their products, please visit their website at: <http://www.soarol.com/>

**Export files are not encrypted. If the file contains personal data, you should protect it carefully. The ADMS export files always contain sensitive personal data.**

## 3.8 Import

TroopMaster will import data from any of our other software packages. You can also import from an ASCII delimited file or a ScoutNET export file.

- a. ASCII Delimited. This option enables you to import data that you were maintaining on some other database system so that you don't have to reenter it. You must first export the data to an ASCII delimited text file. You can use any delimiter you like.

We recommend that you first create an import format structure in TroopMaster and then use that format when creating the export file from your other program. First, select the type of data you plan to import from the "Select area" drop-down list. Then, highlight the desired data items and click **Add**. If you add a field by mistake, highlight it and click remove. If necessary, adjust the data item sequence by highlighting the item to be moved and click the **Move Up** or **Move Down** button. When finished, click the **View Import Format** button and print a copy of the file format. Use this along with the delimiter you selected to create your import file.

When you have the file, return to this dialog, recreate the same import structure, and click **Continue**. Lastly, browse to the import file and click **Open** to begin the import process.

**If you are importing personal data on scouts, adults, merit badge counselors, or POCs, the members being imported will be added as new members to the database. If you are importing other data on scouts and adults (e.g., merit badges, special awards, training, etc.), then for each member in the import file, TroopMaster will look for a name match in the existing database; if it finds one, it will add the new data to that person's records.**

If you import advancement data, then when you exit this dialog, TroopMaster will validate the Boards of Review for each scout. Any Boards of Review that are invalid, based on completion dates of merit badges and other requirements, will be removed. TroopMaster will display a list of any problems it found.

- b. Counselors. TroopMaster can import counselors from the Automated District Management System (ADMS) or from MBCounselors.

(1) ADMS. You can import counselor data from a transfer file created through the ADMS *MBCs>Transfer Counselor Files* menu option. The name of the file will be "ADMS\_MBC Transfer.bak." Normally, counselors in the file will replace any counselors who are currently in your database. If you want to add the imported counselors to your existing database, uncheck the "Delete existing Counselors" checkbox. The import process cannot be used to update data on existing counselors. By default, the import process will only import counselors who are associated with your troop but if you also want to import counselors who are willing to teach outside of their associated troops, check that box.

(2) MBCounselors. This option lets you import merit badge counselors from an export file created by a district leader who is using Troopmaster Software's "MBCounselors" program. The district leader must have created the file through the MBCounselors *File>Export* feature. Also, he must have selected the "Export badges by number" option. If you want to replace the counselors you currently have in the database with the ones in the export file, check the "Delete all existing counselors before importing" checkbox. Otherwise, the new counselors will be added to the ones already in your database.

- c. Cub Scouts from PackMaster. This option lets you import scouts who are graduating from a Cub Scout pack that is using the PackMaster program from Troopmaster Software, Inc. The pack representative should give you a transfer diskette containing the graduating scouts and, optionally, adults. The import feature will add the new scouts and adults to your troop and transfer their personal data. If earned, Arrow of Light will be added to each scout's special awards file.

You cannot import from a backup of the PackMaster database. The pack leader must use the PackMaster ***Graduate to Boy Scouts*** option. The file name will be "graduate06.txt".

This same feature is accessible through the *Scouts>Receive Cub Scouts* option.

- d. ScoutNET. TroopMaster can import scout and adult data from an export file created by your local council using the BSA ScoutNET computer system. Council personnel procedures are as follows:

To generate the unit roster files:

- 1) Enter ScoutNET and click on PROGRAM
- 2) Double-click on UNIT
- 3) Select which unit you are generating files for and click EXPORT
- 4) Go to the Print Repository in ScoutNET and find the file. Click on it.
- 5) When BSAPrint is displayed, click Open, then Save.
- 6) Change the "Save as type" to "Text File". Save the file to a location that you can find later

To generate the advancement history file:

- 1) Enter ScoutNET and click on PROGRAM
- 2) Double-click on Membership Reports
- 3) Select Unit Advancement Detail Report
- 4) Select which unit you are generating files for and run the report
- 5) Go to the Print Repository in ScoutNET and find the file. Click on it.
- 6) When BSAPrint is displayed, click Open, then Save.
- 7) Change the "Save as type" to "Text File". Save the file to a location that you can find later.

If that's done correctly, the name of the personal data should be "LODxxxxx.CSV", where xxxxx denotes your unit type and number (the advancement file will be named manually by the council). The ***File>Import from ScoutNET*** menu option will import from that, which will save you from having to start with an empty database.

This procedure will add the scouts/adults in the export file to your database. You cannot use this to update existing scouts and adults. As of this writing, only a limited amount of personal data is imported. The ScoutNET file does not contain advancement data.

- e. TroopLedger. This option is provided in case your unit started with Troopmaster Software's "TroopLedger" program and you want to transfer the data on scouts/adults from that program. This is a one-time operation. The data to be imported is created through the TroopLedger *File>Transfer* option.

**Any scouts or adult members you may have already entered will be overwritten by the TroopLedger import.**

If your unit uses both programs, TroopMaster is considered the "master" database. Accordingly, new scouts/adults and updated personal data are normally imported into TroopLedger from TroopMaster.

### 3.9 Transfer Data to TM-Traveler

If you've purchased TroopMaster Traveler (our Palm or Pocket PC add-on program), this dialog lets you transfer data between the two databases. There are two options for doing this. You will normally use the **Sync** button, which syncs the TroopMaster and TM-Traveler databases. To replace the TM-Traveler database, click the **Download** button. A third option allows you to erase the handheld database, if necessary.

- a. Sync. Clicking this button will copy your current TroopMaster data to the TM-Traveler interface file on your hard drive. When prompted, sync your handheld computer with your PC. When that's complete, click the **Click Here When HotSync Is Complete** button and TroopMaster will upload new data entries from the handheld and then do the following:
- 1) Place newly credited merit badges under the appropriate rank(s) for each scout.
  - 2) Validate any new Boards of Review that have been credited.
  - 3) Perform automatic crediting of rank requirements based on newly entered activity attendance, service project hours, etc.

When that is complete, TroopMaster will offer to download these changes to the TM-Traveler interface file so that you can sync them back to your handheld.

If you are using a Palm, then when you click the "Sync" button in TroopMaster, it changes the settings in your HotSync Manager. In order for those changes to take effect, TroopMaster must close your sync manager and restart it. This could take up to 30 seconds. It does this again when you are finished syncing.

If, since the last sync, you changed the same area for the same member or the same activity both on the handheld and in the main TroopMaster program, the data from the handheld will overwrite the change that you made in the main program. In this regard, the following is a list of the separate areas within each data group:

- **Activities:** activity data, scout attendance, adult attendance
- **Adults:** personal data, training, special awards
- **Scouts:** personal data (includes patrol assignment, leadership position(s), and swimming level), parental data, special awards, Boy Scout ranks, Varsity awards, Venturing awards, Sea Scout awards, merit badges, partial merit badges
- **MBCs – All member data** (i.e., no separate areas)

For example, if you credit a scout with a merit badge on the handheld and credit him with “Scout Spirit” in the main program, there’s no conflict because those are separate areas of his data. On the other hand, if you updated an adult’s phone number on the handheld and updated his address in the main program, the address change will be lost.

When you run a sync operation on your handheld computer, you are not transferring data directly to/from the TroopMaster database. Instead, you are transferring data to/from an intermediate database file. It is extremely important that you understand this. Before running a sync operation on your handheld computer, always bring up the TroopMaster *Transfer Data to TM-Traveler* dialog and click the Sync button to ensure that the intermediate database file matches the current TroopMaster database.

- b. Download. The *Transfer Data to TM-Traveler* dialog also has a **Download to Handheld** button. This option is useful if for some reason you want to transfer data from TroopMaster to your handheld without loading any of changes you’ve made on the handheld back into TroopMaster.
- c. Erase. If the database on the handheld is old or damaged, use this option to erase it. You can then use the “Sync” or “Download” options to transfer new data. Another reason to do this occasionally is that the size of your handheld database grows over time. Replacing the database would in effect compact it.

Please read *TM-Traveler User’s Manual*, which can be accessed through the TroopMaster *Help* menu.

### 3.10 Notepad

Often you need to make notes of “things to do” or for many other purposes. This option provides rapid access to the Windows Notepad. A “TroopMaster Notes” file has already been created for you. You can use that or you can create as many others as you like.

### 3.11 Create New Archive

The archive created during program installation will store up to 250 scouts and 500 adult members. If that fills up, use this option to create a new archive. New archives are automatically numbered by the program. They are created under the main program DATA folder and they cannot be renamed or relocated.

### 3.12 Create TroopLedger Import Files

TroopLedger cannot import data directly from the TroopMaster database so you must use this option to create a set of data transfer files. These can be created on a diskette, a zip cartridge, hard drive folder, etc. To complete the data transfer, start TroopLedger, select the *File>Import* option, and point it to the location where you saved these files.

### 3.13 Delete Empty Archives

This option will remove any archive folders that have no scouts or adults.

### 3.14 Data Access Password

This option allows you to change your Data Access Password. To do so, you must enter one of the valid passwords defined by the database administrator on the Database Management/Passwords dialog.

### 3.15 Database Management/Passwords

Everyone who uses TroopMaster must have a Data Access Password. **The default password assigned by the system is 'admin'**. If you are going to be the database administrator, use this password dialog to define an administrative-level password. If not, then enter the Data Access Password provided to you by the database administrator.

Only users who have the administrator password are allowed to access the *Database Management/Passwords* dialog, and the administrator password is the first one listed on this dialog. You can optionally use this dialog to define other data access passwords and to assign responsibility for updating specific area(s) of the database based on those passwords. A button on this dialog also enables you to create a Data Encryption Password to further protect your data from unauthorized access ([3.15b](#)).

If you are not the system administrator, the word “Satellite” will be displayed on the Main Menu next to the unit number.

To change the database administrator password, just enter the new one in the first slot on this dialog. However, please remember that once you do that you will no longer be able to restore

data from a backup made while the old password was in effect, so you should immediately make a new backup of your database.

You can use this dialog to hide sensitive data, such as dates of birth and social security numbers, from certain users. Data items that can be protected are listed on the right-hand side of this dialog. For each password, check the items, if any, that you want leaders with that password to be able to access. Any items not checked will be hidden from those leaders on displays and reports. The database administrator always has access to all of the data items.

All users can optionally hide selected data items on reports ([para 3.17e](#)).

Please keep a copy of the passwords you define in a safe place. If you forget the database administrator password, we can help you recover it. However, there is a small service charge if you need for us to analyze the backup file to determine your password. Please visit our website at <http://www.troopmaster.com/password/> for more information on password recovery.

**For obvious reasons, certain sensitive data items must be included on reports that go to your council office. These include the Annual Recharter, the Additional Enrollment, the Unit Advancement Report (4403), the Eagle Application Assistance, and the Tour Permit Assistance reports. Similarly, dates of birth are required for the Birthday List. If any fields marked for protection are needed for one of these reports, a leader who does not have access to those fields will not be allowed to run that report.**

- a. Defining a Satellite. To define a satellite, enter a Data Access Password and select the functional area(s) you wish to assign to that satellite. The available areas are as follows:
- Activities (including scout/adult attendance)
  - Advancement (including scout training and special awards)
  - Duty to God (this award applies to LDS units only)
  - Fundraisers (including scout/adult sales)
  - Order of the Arrow/Mic-O-Say (scout and adult)
  - Adult Members (including training, special awards, and leadership)
  - Merit Badge Counselors
  - Points of Contact
  - Scout Members (including parental data, vehicles, leadership, swimming levels)

To create a “read only” copy of the database, enter a password but don’t check any of the functional areas. The satellite will be able to view the data and print reports, but will not be allowed to make changes.

**If you are using the family links, you must take care when defining your satellites. These links provide a way to tie family members together between four of the functional areas: scouts (and parents), adult members, merit badge counselors and points of contact. Since these four areas are “linked”, you must assign all four areas to the master system or to a single satellite. If you decide to divide responsibility for these**

**areas among two or more leaders, you must first disable the family links. The *Database Management* dialog has a radio button that allows you to do that.**

TroopMaster DotNet. TroopMaster DotNet (para 3.16), an add-on product that enables you to maintain a centralized database on an FTP site. This allows multiple leaders to access and update the database. DotNet allows you to assign different function areas to different leaders. With DotNet, you can assign responsibility for the same functional area to more than one leader while also retaining update authorizations yourself.

The nine functional areas of the database are listed in para 3.15 above. Once DotNet has been enabled (para 3.16), the *Database Management/Passwords* dialog allows you check more than one checkbox in each of the functional area columns. This allows the database administrator to retain control of all nine functional areas while at the same time giving selective update authority to other leaders. You can mix and match the functional areas to specified passwords any way that you like.

Under the DotNet option, the database administrator can change the update authorizations and/or the passwords at any time. New authorizations will apply to the affected DotNet user(s) the next time they log on. If a password is changed, the affected user(s) will be prompted for the new password the next time they log on.

- b. Data Encryption Password - Whenever you use TroopMaster to backup your database (para 3.1), email your database (para 3.4), or upload the database to an FTP site through DotNet (para 3.16), your database is compressed into much smaller backup files (\*.bak). While the compressed files are always encrypted after being created, anyone who gains access to one of the files and has a copy of TroopMaster can decrypt and decompress the file unless you define an encryption password. Therefore, we strongly encourage you to create a unique Data Encryption Password for your unit.

To do that, click the **Data Encryption Password** button. A good password should be at least eight characters long and should contain both letters and numbers. Once you have created this password, no one can decrypt or decompress your backup files without having this password.

**Please keep a copy of the password in a safe place. If you lose your password, visit our website at <http://www.troopmaster.com/password/> for more information on password recovery.**

### 3.16 TroopMaster DotNet

TroopMaster DotNet is an add-on feature that enables you to maintain a centralized database on an FTP site. This allows multiple leaders to access and update the database. DotNet is not a standard part of the TroopMaster program so it must be purchased separately. DotNet comes with an FTP site provided by Troopmaster Software. To enhance security, the address

of our FTP server is not released nor are the actual user ID's and passwords needed to log in. Access to your FTP site is redirected and processed internally by the software.

You're not required to use the FTP site on our server but if you choose to use a different server, user support will be limited. The reason for this is that because of the wide variety of server types and associated operating systems, it is very difficult for us to analyze a DotNet problem if your site is on another server.

The DotNet interface is controlled through a dialog on the "File" menu. When you initialize your web database, TroopMaster compresses the data and archive files from your hard drive into smaller files (TM4Data.bak and TM4Archive.bak) and posts those to your FTP site. Thereafter, whenever you open the program, TroopMaster will automatically download the database backups, de-compress the files, and save them to the standard TroopMaster DATA and ARCHIVE folders on your local hard drive. While you are working in TroopMaster, you will be working with this local copy of your database so you will not experience any Internet delays in program response times. In fact, you can even disconnect from the Internet until you exit the program.

When you exit TroopMaster, the data and archive files will again be compressed and uploaded to your FTP site so the next person to log on will have access to the most current data. If you disconnected from the Internet after starting TroopMaster, you must re-connect before exiting.

- a. Procedures. Select the **File>TroopMaster DotNet** menu option. Then, check the "Activate TroopMaster DotNet" checkbox and enter the server, user ID, and FTP password needed to access your FTP site. Please remember that your user ID and password are case-sensitive. We recommend that you use the default port (21) but you can change that if you like.

Next, enter the path on your FTP site where the data will be stored (e.g., /data). This folder must already exist on the site. If you're using the FTP site on our server, the web data path is always just a forward slash (/). By default, TroopMaster uses "Passive" mode transfers, and this mode is required for users with certain types of firewalls. However, if you want the FTP site to establish the data connection to your PC, uncheck this box.

If you wish, you can use passwords to restrict the functional area(s) of the database that certain DotNet users are authorized to update as well as to make some users "read only". To do that, click the **Database Management** button ([para 3.15](#)).

While the compressed database files are always encrypted before being uploaded to the FTP site, anyone who gains access to the files and has a current copy of TroopMaster can decrypt and decompress the files unless you define a unique encryption password for your troop. To do that, click the **Data Encryption Password** button ([para 3.16b](#)).

**Troopmaster Software strongly encourages you to create an encryption password. Once you do that, no one without that password can view any of the data from the web database or from a database backup file, no matter how they obtain a copy of the file.**

If you have scout/adult photos, select upload/download options for handling those. On both startup and shutdown, you can choose to always transfer photos, never transfer photos, or have the program prompt you regarding the transfer. If you do transfer your photos, those will also be compressed into smaller files (TM4DataPhoto.bak and TM4ArchivePhoto.bak) but these files will still be quite large, so routinely downloading and uploading the photos is not recommended. There's no need to transfer photos unless they change.

Occasionally, someone may want to log on without locking the database against updates by other users; e.g., just to print a report. To accommodate that, there is a "Prompt for read-only" option on startup. If you take this option, you will be able to view any part of the database but you will be prevented from making changes.

If you would like the system to prompt you before downloading files from your DotNet site, select the Prompt to Download on Startup option. The program will then prompt you on startup with an option to either download the DotNet files or to start using the local files on your hard drive. This option is useful if you need data quickly or if the web database becomes damaged. However, you will be placed in "read only" mode so that you don't accidentally make changes that would get overwritten the next time you logged onto DotNet.

There may also be times when you'll want to exit the program without unlocking the web database. If so, select the "Prompt to upload/unlock database on exit" option. For example, if you'd like to take data to meetings on a laptop computer **and make updates**, you could choose to leave the web database locked until you come back home and upload your changes. This not only prevents other users from making changes while you are gone, it allows you to log back on later without overwriting your changes with the older data from the FTP site.

Each DotNet user enters their own name, phone number and email address in the fields provided. This information is used to let other unit leaders know who is updating the data in the event that they try to log on at the same time.

Please make sure that the contact information entered is unique for each computer that will be connecting to DotNet. If you enter the same contact information on multiple computers and to login to DotNet on both machines at the same time, the system will not report the database currently being locked since it appears to be the same user logging on.

The **Initialize Database** button is normally used only by the database administrator to post the unit database to your FTP site for the first time, but it can be used again in the event the web database gets damaged or if you just want to replace the database for some reason. Your database is automatically saved to your FTP site each time you exit the program, so you should not execute this option on a regular basis.

The **Unlock Database** button is available as an override option in case a user either forgets to or for some reason cannot unlock the FTP database normally.

TroopMaster keeps a log file of the last 20 users who have accessed the web database in "update" mode and the date/time they logged in. To review it, click **View Log File**.

The **Delete DotNet Database** button will delete all of the data on your DotNet FTP site.

If your web database and/or the database “status” file become damaged, you can delete and replace the damaged files with data from your local hard drive by clicking the **Delete DotNet Database** button then the **Initialize Database** button.

If the web database becomes damaged (which can happen if the upload process gets interrupted), it must be reinitialized. By viewing the log file, you can determine who last accessed the database. The web database should then be initialized from that leader’s computer, assuming that his database isn’t also damaged. We also recommend that each DotNet user routinely make a database backup when exiting TroopMaster. Doing that gives you another recovery option; i.e., you can compare the dates/times of the various backups and reinitialize using the most recent one.

- b. Restrictions. Once someone with a data access password that allows updates has logged onto DotNet, the database is locked and all other unit leaders will be prevented from logging on to make changes. This is true regardless of whether the leader who logged on is authorized to update the entire database or just one or two functional areas.

If another leader with an update password tries to access the files while they are locked, he will see a message stating that the database is locked. The message will include the name of the leader using the files and the time that this leader logged on. At that point, the leader attempting to access the files will have the choice of either exiting the program or logging on in “read only” mode. If the leader chooses the “read only” option, he can view any of the dialogs and reports but will not be allowed to make any changes.

There is a small time delay in sending the “locked” signal to your FTP site. Although extremely unlikely, it is not completely impossible for two leaders to be logged on for update at the same time. However, TroopMaster rechecks the locked status when you exit the program. If someone else is logged on or was logged on and has since logged off, the problem will be brought to your attention at that time.

Users who are “read only” or who are restricted to only being able to update certain functional area(s) can still view any part of the database. The only exceptions are if the database administrator has chosen to protect certain sensitive data items, such as dates of birth or social security numbers. These restrictions, if any, are also based on Data Access Password assignments ([para 3.15](#)).

Logging on in “read-only” mode does not lock the web database for other users and when a “read only” user exits TroopMaster, the local database is not uploaded to the FTP site.

- c. Use With TM-Traveler. If you also have the TM-Traveler add-on, you can continue to use that but keep in mind that when you sync to Traveler, you then have copies of scout and adult records that are no longer centralized. For example, this means that if you make a change to a scout’s advancement record on Traveler and before you sync that change back to the web database, some other leader changes that same area of a scout’s or an

adult's records, you will overwrite the other leader's change when you sync back. This only affects members where two leaders have changed the same area of the same member's records. If the other leader updates a different member or area, then there is no problem.

In this regard, there are three different areas to a scout's record: rank requirements, merit badges, and special awards. For example, if one leader credits a scout with a merit badge and another leader credits him with "Scout Spirit," there's no conflict. Similarly, it will not cause a problem if one leader updates an adult's phone number while another credits him with a training course. Two different leaders can even mark attendance on separate copies of Traveler as long as they do that for two different activities.

However, if a leader updates a member in the web database while another leader updates the same area of that member's record in TM-Traveler, then the next sync operation will overwrite the web database change with the one from TM-Traveler.

### 3.17 Preferences

This dialog is used to adjust system-wide settings and to customize TroopMaster to your personal preferences. The dialog has five tabs:

- a. Default Settings. This tab lets you set default values for city, state, zip code, area code, and phone types. Setting these values will save you time whenever you add new scouts and adults to the system. If you are operating in a foreign country that does not use U.S. formatted zip codes and phone numbers, you should de-select the "U.S. phone/zip format" checkbox. TroopMaster processes overseas addresses, zip codes, and phone numbers differently than it does for stateside units. A list of countries and associated country codes is available through the **Help** button. This tab also has several button and checkbox options:
  - (1) Display 'Tip of the Day' on Startup. To turn these tips off, uncheck this box.
  - (2) Use Large Toolbar Buttons. This checkbox allows you to control the size of your toolbar buttons
  - (3) Highlight links/ScoutNet Required fields. This check box will highlight any links or ScoutNet required fields in the system.
  - (4) Omit Completed MBs from Selection Lists. Check this box to omit merit badges a scout has completed from badge selection lists in the individual advancement area.
  - (5) Prompt for Merit Badge Counselor on Badge Completion. By default, when you credit a merit badge, TroopMaster presents a dialog for you to select the counselor who taught the badge. If you don't need to track that, turn this checkbox off.

- (6) Prompt for Data Backup on Program Exit. Because backing up your database is so important, TroopMaster will offer to perform a backup each time you exit the program. This turns the backup prompt off.
- (7) Save Location of Report Display Window. If this box is checked, TroopMaster remembers the size and location of the last report window displayed and uses those settings as defaults for the next report. If this box is unchecked, TroopMaster will bring up the report display window using the same location/size as the main application window.
- (8) Use Formal Name on Lists/Reports. TroopMaster always uses scout and adult formal names instead of nicknames on ScoutNET related reports. Check this option if you want the program to use formal names on all reports.
- (9) Include Area Code on Reports. If all of your scouts and adults share the same area code for all phone numbers, you can elect to omit area codes on reports.
- (10) Prompt for Data Access Password on Startup. If you want to prevent unauthorized people from accessing TroopMaster on your computer, check this box and you will be prompted for your data access password every time you start the program.

If you forget your password, we can help you to recover it. Please visit our website at <http://www.troopmaster.com/password/> for more information on password recovery

- (11) Include Mic-O-Say on Menus. Mic-O-Say is a program similar to Order of the Arrow for scouts in the Midwest. TroopMaster supports that but if you don't need this feature, uncheck this box.
- (12) Automatically Monitor LDS Scout Groups (LDS only). Check this box if you are an LDS unit and you want TroopMaster to automatically move scouts to the appropriate member group (Troop, Team, or Crew) based on age. For example, when TroopMaster sees that a scout has turned 14, it will automatically move him from the "Troop" to the "Team" member group and check the "Varsity" checkbox on his *Individual Advancement* dialog.
- (13) Automatically check for newer version. Check this box for to automatically check the internet for a new program update.
- (14) U.S. Phone/Zip Format. If you have a U.S. unit or your unit is outside of the U.S. but still uses U.S. formats, check this box.

The ScoutNET overseas phone format allows up to five digits for the city code. This must be followed by a separator (hyphen or period) and then a phone number of up to seven digits.

- (15) Reactivate System Messages. There are a number of pop-up information messages that you can selectively turn off so that they are not displayed again. Click this button to reactivate any messages that you have turned off.
- b. Background. This tab lets you adjust your main menu background colors. You can also replace our camping scene bitmap, if desired.

- c. Page Settings. This tab lets you adjust margin settings for reports and labels. You can also modify the label settings to accommodate most label sizes. Separate settings are available for mailing labels and award cards (see para [12.3c](#) for more information on award cards). There is a **Restore Defaults** button in case you get yourself into trouble. If you want to increase the number of lines printed on each page, adjust the “Paper Saver” setting. In addition, there is a “Duplex Printing” option in case you want to print on both sides of the paper. TroopMaster can do this even if you don’t have a full duplex printer.
- d. Report Fonts. This tab lets you choose a font, style, point size, and color for each section of the reports. Just click the button for the section you wish to change.
- e. Hidden Fields. This tab allows you to block the display of sensitive data (e.g., dates of birth, phone numbers, and social security numbers) on reports. To hide a field, check the box next to it. Settings on this dialog are not stored in the TroopMaster database; i.e., these settings are stored on and only affect the operation of the computer on which the settings are made. For last and first names, you can optionally reduce the names to just initials on reports. Any other data item checked will not appear on the reports at all. Of course, if your Data Access Password does not allow you to access some of the protected data fields ([para3.15](#)), those will be blocked on displays and reports regardless of your settings on this tab.

Some reports, such as mailing labels, the *Eagle Honor Roll*, and MBC/POC lists, are useless without names so member names are never reduced to initials on those reports.

**For obvious reasons, certain sensitive data items (such as driver’s licenses and dates of birth) must be included on reports that go to your council office. These reports include the *Annual Recharter*, the *Additional Enrollment*, the *Unit Advancement Report (4403)*, the *Eagle Application Assistance*, and the *Tour Permit Assistance* reports. TroopMaster ignores the settings on this tab when generating those reports. Similarly, dates of birth are required for the *Birthday List*.**

### 3.18 Repair Database

You will probably never need this option but it is available, just in case. The option will rebuild your index files and examine your other data files. If records are missing, they will be replaced with blank records. TroopMaster will report any errors it finds. However, the repairs that can be made are very limited. If records have been overwritten by blanks or “garbage,” the repair process will not be able to fix it.

**This is an emergency procedure. If your database is damaged, your best option is to restore your data from a good backup. Before running this option, backup your existing data in case the repair process fails. Please do not overwrite any previous backups.**

# CHAPTER 4. UNIT

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## 4.0 Overview

This area allows you to enter the basic information on your unit (e.g., address, sponsor, meeting place, etc.). This is also where you can define your patrol names, make patrol assignments, and credit unit/patrol awards.

## 4.1 Unit General Information

This information is needed by TroopMaster to generate the *Annual Recharter* report, the *Unit Advancement Report* (4403), and your unit's return address labels. ScoutNET-required data fields are marked with green field labels. Most of the fields are self-explanatory. A brief description of the other areas follows:

- a. Unit/Level. If your unit is not a Boy Scout Troop, select the correct level. If your unit operates under the auspices of the Church of Jesus Christ of Latter-Day Saints, check the "LDS" checkbox and TroopMaster will apply the special LDS rules when it validates your *Annual Recharter* report.

The "LDS Unit" checkbox also activates several features not otherwise available. For example, TroopMaster will create Troop, Team, and Crew member groups ([para 4.4](#)). Also, the "[Duty to God](#)" (DTG) award becomes available. You can access the data entry dialog for this award through a button on the *Individual Advancement* dialog. In addition, two "Duty to God" [report options](#) are added to the *Reports>Duty To God* menu. However, these new menu items will not be visible until the next time you start the program. (Note: Deactivating this checkbox will not cause scouts to lose credit for DTG award requirements.)

- b. Council/District. Enter your council name and number (#) and also the name of your district.
- c. Website. If your unit has a website, enter the URL. Clicking the **Website** button will then take you directly to your site.
- d. Special Needs. If yours is a "special needs" unit, select the appropriate type and click the **Description** button to provide details.
- e. Meeting Place. Enter the name, address and phone number of your unit's primary meeting location and phone number.
- f. Vehicles. If you have unit vehicles, enter the details here and TroopMaster will include these vehicles as options for your adult leaders on the *Tour Permit Assistance* report.
- g. Mail Recipient. This information is used by TroopMaster to produce your return address labels. Your unit type/number (e.g., "Troop 123") will automatically be included on the labels, so you don't need to enter that.

- h. Original Charter/Expiration. Enter the date on which your unit was originally chartered and the date that your current charter expires.
- i. Chartered Organization. Enter the name, address and phone number of your chartered organization.

A remarks field is available to record information for which there is no specific field. Entries in this field will not be included in the recharter report.

If you wish to include a photo of your unit, click the **Unit Photo** button. This photo will be printed on the *Unit General Information* report.

## 4.2 Patrol Assignments

This option lets you set or change your patrol assignments. The “List currently displays” drop-down box allows you to display the names of all scouts in the unit or just those in a specific patrol. There are several ways to assign scouts to patrols:

- 1) Highlight the names of one or more scouts, highlight the desired patrol, and click the **Assign** button.
- 2) Highlight the names of one or more scouts and double-click the desired patrol.
- 3) Highlight the desired patrol and double-click the names of the scouts being assigned to that patrol.

## 4.3 Patrol Names

This display lets you define up to 24 patrols. Patrols will always be printed on reports in the same order as listed on this dialog. Since you may be adding more patrols later, you may wish to space out your entries accordingly.

TroopMaster internally stores each scout’s patrol assignment by number, not by name. Therefore, if you rearrange the patrols on this dialog, you must also reassign your scouts through the *Patrol Assignments* dialog.

## 4.4 Group Members

The group members feature allows you to create reports on subsets of your unit; i.e., instead of including all of your members, this allows you to choose which members you want to see on a report. This feature replaces the “flags” option that was used in earlier versions, and it is much more flexible because you can create and name as many member groups as desired. Scouts, adult leaders, MBCs, and/or POCs can be added to any group.

Many of the TroopMaster reports provide a “Select Member Groups” option (available through “Filtered Selection”) that allows you to select one or more groups for inclusion on the reports. If you do that, only the members of the selected group(s) will be included. For example, you could create a group of your troop committee members and then print a phone

list or general purpose worksheet that includes only those members. Or you could create a group of scouts and adults who will be attending a specific camping trip and then generate mailing labels just for those members.

If you generate a report that is not applicable to certain members of a group, those members will not be included. For example, if you generate an adult leader phone list from a group that contains adults and POCs, the POCs would be excluded.

Member Groups can be used in conjunction with activities in numerous ways. For example, if you create a group consisting of scouts/adults who will attend summer camp, you can use this group to create permission slips, rosters, advancement reports, a photo directory, etc. When summer camp is over, you can select this group from the *Edit/Review Activity* dialog to credit attendance.

If the “LDS Unit” box is checked on the *Unit General Information* dialog, TroopMaster will automatically create member groups for your troop, team and crew (e.g., LDS\_Troop) the next time you start the program, and it will assign each existing scout to the appropriate group based on age. You will need to assign your adults to the appropriate group(s) manually. Thereafter, each time you add a new adult or scout to the system, you will be asked to indicate the group to which the new member is assigned. For adults, you can designate more than one group. Scouts will automatically be moved up to the next group as their ages change but you can manually adjust the scouts/adults assigned to the three groups, as needed.

- a. Create a New Group. First, enter a “Description”. Then, highlight the desired names and click **Add**. Use the “Display” drop-down list to adjust the list of names from which to select. When finished, click the **Save** button and enter a name (e.g., “Troop Committee”) for the new group.

You can use an existing group as the starting point for creating a new group. Just select the existing group from the drop-down list, enter a new description, and then add or delete names, as desired. When finished, click **Save**, and enter a new group name. Be sure to enter a new name or you will overwrite the existing group.

- b. Modify a Group. Select the desired group from the drop-down list and then add or delete names, as desired. When finished, click **Save**.
- c. Delete a Group. Select the desired group from the drop-down list and click **Delete**.

You can print copies of the groups you’ve created through *Reports>Other*.

## 4.5 Patrol Awards

This option lets you credit awards for any of your patrols. Select the desired patrol and for each award, enter an award name and completion date; then, click **Add**. To remove an erroneous award, highlight it and click **Remove**.

## 4.6 Unit Awards

This option lets you credit unit awards. For each award, enter an award name and completion date; then, click **Add**. To remove an erroneous award, highlight it and click **Remove**.

# CHAPTER 5. SCOUTS

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## 5.0 Overview

In addition to adding and deleting scouts from your unit, this area lets you enter, review, and edit information on your scouts, such as personal data and leadership assignments. Other options include swimming levels, school grade promotion, archive and retrieval from archive, and import of graduating Cub Scouts.

## 5.1 Scout Management

This dialog allows you to add new scouts to the unit and to edit/review data on existing scouts. The **Add New** and **Personal Data** buttons access the same tabbed dialog for data entry. Additional buttons allow you to access the other areas of each scout's records. If you need to delete or archive a scout, use the **Del/Archive** button on this dialog or on the scout personal data dialog.

a. Personal Data. Most data fields are self-explanatory. Green field labels denote data items that are required for the BSA ScoutNET reports ([para 12.11g](#)). A brief description of each tab follows.

- (1) Personal #1. In addition to name and address, this tab has fields for date of birth (DOB), BSA Person ID number (from the membership card), social security number (SSN), school grade and Cub history. A separate mailing address field is available if the scout's mailing address is different from his street address. If you want to attach a photo of the scout, click the **Photo** button and browse to the appropriate JPG, GIF, or BMP file. Driver's license data can be entered for Venturing scouts over age 18.

The email address field can be used for the scout's email address but you really should regard this as the primary family address for scout-related correspondence. TroopMaster allows bulk emailing of individual scout reports. If you want those reports sent to this address, check the associated checkbox.

**Many units requested the data field for social security number but collecting SSN's raises Privacy Act issues. You should consult an attorney before doing so.**

The scout's formal first name will be used on reports that go to council, but normally his nickname will be used on all other displays and reports. If desired, you can elect to use formal names throughout the program through an option on the **File>Preferences** dialog.

The "Joined Unit" date is used when computing attendance percentages and also when computing service stars. If the scout has had breaks in service, enter the date he began his current service here and enter periods of prior service on the "Prior Service" tab. TroopMaster examines current service, prior service, and leadership history when computing service stars, being careful not to double credit overlapping periods of service. Completed service stars are included on the *Court of Honor* report. There's also a *Service Years* report.

If all or most of your scouts have the same city, state, area code, etc., enter those on the *Preferences* dialog and TroopMaster will use your entries as the defaults.

To email a scout, just click the button next to his email address.

- (2) Personal #2. This tab lets you record medical information including the last date for each class of physical exam. The “Special Needs” field is there in case the scout has a special condition that should be recorded. If so, you should click the **Description** button to more fully describe the condition. Family vehicle information will appear on the *Unit Vehicles* and *Tour Permit Assistance* reports.

**Special needs codes and the corresponding descriptions are included in your *Annual Recharter* report for ScoutNET.**

- (3) Parents. ScoutNET-required fields are marked with green field labels but you need only enter data on one parent. If the parent is going to be an adult leader, merit badge counselor, and/or a POC, use the “links” to create record(s) in the associated area(s). Please see [Chapter 15](#) for more information on family links. The “Guardian” checkbox indicates that this adult has legal authority for the scout—most parents are also guardians under the BSA definition of this field.

**Many units requested the data fields for social security numbers but collecting SSN’s raises Privacy Act issues. You should consult an attorney before doing so.**

You must enter data in all of the required fields for at least one parent. Parents who have data entries in all of the required fields will be included in the *Annual Recharter* report.

TroopMaster allows bulk emailing of individual scout reports. If you want those reports sent to this address(es), check the associated checkbox.

- (4) Alt Relative Data. This tab allows entry of information on an additional relative or other adult when needed due to divorce, separation, etc. Inclusion of alternate relative information is an option on several reports.
- (5) Prior Service. If the scout has had breaks in service, enter the “From-To” dates of the scout's prior service and the associated levels, unit numbers, and council numbers. Prior service is one of the items considered when computing service stars for the *Court of Honor* report. Cub Scout service is not creditable toward Boy Scout service stars—it should be entered on the “Personal #1” tab.

(6) Remarks/Other. This tab provides a place for you to enter information for which there are no pre-defined data fields. In addition to a remarks field, there are eight user-defined fields: four text fields and four checkboxes. You can enter your own label for any of these fields through the **Define Field Labels** button. For example, you might redefine one of the text field labels as “School” or use one of the checkboxes to indicate “Fees Paid”. TroopMaster has a special report for user-defined data fields. This tab also has four fields through which you can link external files, such as a Word document, to the scout. To do that, just click the browse button and select the desired file. Use the **Define Field Labels** button to label each field. Once you have done that, you can click on the field label button to open the file. To remove a file, just erase the path/file name.

Field labels you define for any scout will be used for all of your scouts.

When you click **OK**, TroopMaster will save your data entries.

If you are in the “Add” mode, TroopMaster will present a pop-up list of your patrols so that you can assign the new scout to a patrol, if desired. When you close the *Patrol Assignments* dialog, TroopMaster will clear the scout entry dialog so that you can add another scout, if desired. Since city, state, and zip code are often the same or similar for all scouts in a unit those fields will not be cleared. Click **Cancel** when you have finished adding scouts.

If the “LDS Unit” box is checked on the *Unit General Information* dialog, then whenever you add a new scout, TroopMaster will ask you to assign him to the troop, team, or crew Member Group ([para 4.4](#)).

If you are entering the brother of another scout in your unit, use the **Link Sibling** button to link the scout to his brother. Please see [Chapter 15](#) for more information on family links. Sibling(s) to whom the scout is linked are displayed in a drop-down list under the scout’s “Nickname” field and you can switch to any sibling’s record by selecting his name from the list. To remove an existing link, uncheck the “Link Sibling” checkbox.

If you are in “Edit” mode, several additional buttons are available. Quick access buttons will take you directly to the advancement, training, O/A, or leadership assignment dialogs for the scout being displayed. **Previous** and **Next** buttons enable you to page to the next or previous scout in the unit.

Note that when you click the **Next** or **Previous** buttons, TroopMaster leaves you on the same tab. This provides a powerful method of reviewing and editing data on your scouts. For example, to review medical information, go to the “Personal #2” tab for the first scout, make any desired changes, and then click **Next** to move to the next scout.

To archive or delete a scout, click the **Del/Archive** button. A pop-up window gives you the option of archiving the scout before he is deleted.

If you delete/archive a scout who is over 17, you will be given the option of creating a record for him in the adults file and transferring his activity attendance to his new adult record. If you delete a scout without archiving him, you will permanently erase all of his data.

- b. Advancement. This button will take you to the selected scout's *Individual Advancement* dialog. Please see [Chapter 6](#) for more information on entering advancement data.
- c. Special Awards. Click this button to enter or review the scout's special awards. These are also covered in para [6.15](#).
- d. Leadership. This dialog handles the scout's current leadership position(s) as well as any previous positions in which he has served.
  - (1) Current Positions. To assign a scout to a position, select it from the drop-down list containing a menu of defined leadership positions. If you need to assign the scout to a position that is not on the menu, click the **Define Positions** button and add it. You can assign two current leadership positions to each scout. To remove a scout from a previously entered position, select the blank position from the drop-down list and enter the date he vacated the position. The first position has a "Credit toward leadership requirement" checkbox. The default value is taken from the setting on the *Define Leadership* dialog.

**TroopMaster monitors and automatically credits the "Position of Responsibility" requirements for Star, Life, and Eagle (see [Appendix B](#)). In doing so, only the first leadership position is considered. Therefore, if you assign two positions to a scout, you should use the more important of the two for the first position.**

Suppose that a scout is assigned to a position but is not doing a good job and you don't want him to get any credit for the "Position of Responsibility" requirement. If you turn the "Credit" checkbox off, TroopMaster will not apply the position toward automatic credit. If the rank requirement has already been credited, you will need to erase the completion date.

When a scout changes leadership positions, the vacated position is automatically moved to his leadership history list. The "Effective Date" of the new position is used as the closeout date of the old position.

- (2) Leadership History. This area allows you to enter previous positions (maximum 15) in which the scout served. To add a position to the list, select it from the drop-down menu and enter the "From-To" dates. If the position was creditable toward the "Position of Responsibility" requirement, check the "Credit toward leadership requirement" checkbox. Then, click **Add**. To remove a position from the list, highlight the position and click **Remove**. Leadership history is used in conjunction with current service and prior service when computing service stars for the *Court of Honor* report.

A scout's leadership history is included on his *Individual History* report. If a scout serves in more than 15 positions, the oldest one is dropped when a new one is added to this list.

**In computing automatic credit of the “Position of Responsibility” requirement, TroopMaster considers the scout’s current position #1 plus the creditable positions on his leadership history list. Remember that only positions that he has held since his previous promotion are counted toward completion of this requirement for his next rank. Valid positions for each rank are listed in the Boy Scout Handbook.**

- e. Training. Click this button to enter or review training courses for the selected scout. For more information on scout training, see para [6.16](#).
- f. Order of the Arrow (O/A). Click this button to enter or review O/A data on the selected scout. See [Chapter 11](#) for more information.
- g. Mic-O-Say. Click this button to enter or review Mic-O-Say data ([Chapter 10](#)) on the selected scout.

## 5.2 Define Leadership

Use this dialog to add leadership positions to the list of system-defined positions. Positions listed here will appear in the drop-down menu presented whenever you assign a scout to a position. To define a new position, enter a position name and if it will usually be counted toward the “Position of Responsibility” requirements, click the “Credit” checkbox. Then, click **Add**. User-defined positions are flagged with asterisks.

## 5.3 Define Special Awards

Use this dialog to define the scout special awards commonly presented by your unit. These entries will appear on an awards menu that is presented whenever you credit a scout with an award. However, you can credit scouts with awards that are not on the menu by using the “Other” option ([para 6.15](#)).

## 5.4 Define Training

Use this dialog to define the training courses commonly attended by your scouts. These entries will appear on a course menu that is presented whenever you credit a scout with completing a course. However, you can credit scouts with courses that are not on the menu by using the “Other” option ([para 6.16](#)).

## 5.5 Patrol Assignments

This option takes you the same Patrol Assignments dialog described in the “Unit” Chapter ([para 4.2](#)).

## 5.6 Promote to Next School Grade

The scout personal data includes a “Grade” field. At the end of the school year, you can promote all of the scouts in the unit through this dialog.

## 5.7 Swimming Levels

Swimming level information should be updated every year when your members are re-qualified. The “List currently displays” drop-down box allows you to display the names of all members in the unit or just those assigned to a specific patrol or swimming level. There are several ways to assign members to the appropriate swimming levels:

- 1) Highlight the names of one or more members, highlight the desired level, enter a date, and click the **Assign** button.
- 2) Highlight the names of one or more members, enter a date, and double-click the desired level.
- 3) Highlight the desired level, enter a date, and double-click the names of the members being assigned to that level.

## 5.8 Retrieve from Archive

If a scout you archived later returns to your unit, you can retrieve his data through this option. See [Chapter 13](#) for more information on use of the archive.

## 5.9 Receive Cub Scouts from PackMaster

This option lets you import scouts who are graduating from a Cub Scout pack that is using the PackMaster program from Troopmaster Software, Inc. The pack representative should give you a transfer diskette containing the graduating scouts and, optionally, adults. The import feature will add the new scouts and adults to your unit and transfer their personal data. If earned, Arrow of Light will be added to each scout's special awards file.

You cannot import from a backup of the PackMaster database. The pack leader must use PackMaster's *Graduate to Boy Scouts* option. The file name will be “graduate.txt”.

This same feature is accessible through the *File>Import Cub Scouts* menu option.

## 5.10 Receive Scouts From Another Unit

You can electronically receive scouts from another unit using TroopMaster if that unit created a set of transfer files ([para 5.11](#)). Enter the path to the transfer file and click **OK**. The file name will be TM4Transfer.bak. This function will import virtually all of the data on each scout except for fundraiser data and attendance at specific activities. However, it will store each scout's total attendance (i.e., total nights camped, total miles hiked, etc.) in the *Activities>Set Prior Totals* area ([para 7.3](#)).

If the other unit also transferred adults, see [para 8.1g](#).

## 5.11 Transfer Scouts to Another Unit

If some of your scouts/adults are moving to another unit which is also using the current version of TroopMaster, this option will create a set of transfer files that will save the other unit leader from having to enter the members manually. Running this option will not delete the members from your unit. Enter the target location (usually a diskette) for the transfer files. Then, highlight all of the transferring scouts and adults and click **Transfer Members**.

**You must transfer all of the departing members before leaving this dialog. Each time you use this dialog, TroopMaster creates a new set of transfer files. Previously created transfer files, if any, will be erased.**

**The data in the transfer file is compressed but it is not encrypted. Encryption is not possible because the receiving unit will be using a different encryption password. Since the file contains personal data, you should protect it carefully.**

Because the file formats are very different, you cannot transfer scouts to a unit that is using an earlier version of TroopMaster.

This same dialog is accessible through the *Adults>Adult Members* menu.

# CHAPTER 6. ADVANCEMENT

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## 6.0 Overview

You will initially enter all of your advancement data through the *Individual Advancement* dialog. Select the desired scout from the list box on the left and Troopmaster will retrieve the scout's advancement records. You can then select any area for data entry or review. Radio buttons allow you to control which type of awards (i.e., Boy Scouts, Venturing, etc.) are displayed in the list box. Checkboxes on the right allow you to determine the type(s) of reports on which you want each scout included. For example, if you have a crew, the checkboxes would let you include all crew members on Venturing reports while limiting the Boy Scout reports to just those members working on Boy Scout advancement.

Select the desired awards group and the associated awards will appear in the list box. If applicable, the badge toward which the scout is currently working is automatically highlighted. After selecting the desired option, you can then “page” sequentially to any of the other advancement dialogs in the selected group. In addition, quick access buttons allow you to jump directly to the scout’s personal data, leadership, training, or special awards dialogs.

You can view a more complete description for any requirement on any of the award/badge dialogs just by clicking with your mouse on the requirement.

For requirements that have sub-requirements, such as the “electives” requirements for Sea Scout awards and most of the requirements for the Bronze Outdoor/Ranger awards, clicking on a requirement will display a list of checkboxes for tracking the associated sub-requirements.

The “Inactive” checkbox allows you to turn off automatic credit (see [Appendix B](#)) of the Star, Life, and Eagle “Participation” requirements.

The *Merit Badges-Completed* dialog ([para 6.9](#)) lets you enter all of a scout’s completed merit badges on one dialog and have TroopMaster place them under the appropriate ranks for you based on BSA rules. If you would prefer to manually place the badges on the various rank dialogs, check the “Manual MB Placement” checkbox.

In “Manual MB Placement” mode, TroopMaster will still monitor your entries to ensure that a sufficient number of Eagle-required badges are entered for each rank. However, the program will not stop you from entering a merit badge under the “wrong” rank. For example, even if a scout still needs Eagle-required badges for Star, TroopMaster will not stop you from entering an Eagle-required badge under Life. In selecting manual mode, you assume most of the burden for ensuring that the scout advances according to BSA rules.

If “Manual MB placement” has not been selected, a merit badge you credit via group advancement or the individual rank dialogs will be placed exactly the same as if you had entered the badge on the *Merit Badges-Completed* dialog.

TroopMaster has a feature that allows you to disable the Eagle-required merit badge rules for disabled scouts. Please see [Appendix D](#).

## 6.1 Date Entries

Dates can be entered for all requirements including those that TroopMaster automatically monitors and credits. “Boards of Review” dates and most award completion dates are reviewed for accuracy. For example, a Board of Review should not be entered unless all other requirements for the rank are complete. TroopMaster will alert you to errors it detects.

In addition to the standard date entry formats accepted throughout TroopMaster, several additional options are available in the advancement area. For example, if you don’t know the specific date on which a scout completed his “Patrol Cook” requirement, just type a *C* as the first character of the date field, and TroopMaster will enter the word “Complete” as the date. Similarly, enter an *N* (“N/A”) for requirements that are not applicable to a specific scout (e.g., a requirement that BSA added after the scout completed a rank). There are several other date entry options and shortcuts ([para 2.6](#)) to make date entry easier and save you time.

Actual dates (MM/DD/YY) are required for completion dates for all advancement awards, including Boards of Review.

## 6.2 Merit Badges

If “Manual MB placement” has not been selected, TroopMaster will automatically place newly credited merit badges under the appropriate rank based on the badges the scout has already earned and BSA advancement rules. Automatic badge placement works the same way regardless of whether you credit badges via the senior rank dialogs, the *Merit Badges-Completed* dialog, or *Group Advancement*. When appropriate, previously credited merit badges will be relocated based on the type and completion date of the new badge being credited.

The methodology that TroopMaster uses for its badge placement function is explained in [Appendix C](#) and we strongly recommend that you read that. The badge placement function works even if the scout completed his ranks under earlier BSA advancement rules.

For Star, Life, and Eagle, a note at the top of each dialog will tell you how many of the remaining open slots must be filled with badges from the Eagle-required list. TroopMaster will not let you credit a non-Eagle badge toward a rank if all remaining merit badges for that rank must be Eagle-required badges.

**The automatic merit badge placement function never adjusts or relocates merit badges credited under completed ranks. If you need to do that, you’ll need to temporarily demote the scout to a rank below the one you wish to adjust. If you only need to modify the date on one of the merit badges, you can do so without demoting the scout by double-clicking on the badge.**

You can have TroopMaster omit merit badges that a scout has already completed from the badge selection lists ([para, 3.17](#)).

To change a date for any of the previously entered badges, double-click the entry and enter the new date in the pop-up window.

Whenever you credit a merit badge or edit an existing one, you can optionally indicate which counselor taught the badge. Select the counselor from the list of counselors in the TroopMaster database, or manually enter the name and BSA ID number of the counselor. If you don't need to use this counselor option, you can turn that off through *File>Preferences*.

To remove a previously entered badge, go to the *Merit Badges-Completed* dialog or to the associated rank dialog, highlight the badge, and click **Remove**.

Outdated merit badges, such as Signaling, are still included on the menus in case a scout earned or started the badge before it was dropped. Outdated badges are marked with a pound sign (#).

If BSA releases a new merit badge, you can add that to your system by installing the latest program update patch ([para 1.6](#)).

## 6.3 Reported/Presented Flags

Sometimes a scout does not tell you about a merit badge or advancement award he earned until after the *Unit Advancement Report* (4403) has already been submitted to the council office. Also, some scouts miss the Court of Honor and you need a way of reminding yourself to present their awards at the next Court.

For merit badges, rank badges, and advancement awards, TroopMaster tracks whether the award has been reported to the council office. For these awards and special awards, it also tracks whether or not each award has been presented (see **Note** below) to the scouts at a Court of Honor. The reported/presented flags are shown on the rank dialogs with “R/P” checkboxes and on the *Special Awards* dialog by a “Yes/No” column in the list box.

Whenever you generate a *Court of Honor* report ([para 12.3c](#)), TroopMaster will optionally include awards earned prior to the “From” date of the report if the “Presented” flags are not checked. When it is finished generating the report, TroopMaster will offer to set the “Presented” flags for all the awards on the report. If a scout misses the Court, you should retrieve his records and clear the appropriate “Presented” flags.

When you generate the *Unit Advancement Report* (4403) for your council ([para 12.3c](#)), TroopMaster will optionally include any badges earned prior to the “From” date if the “Reported” flags are not set. When it is finished generating the report, TroopMaster will offer to set the “Reported” flag for all of the badges included on the report.

We recognize that badges and awards are generally given to a scout as soon as he earns them. The term “Presented” in TroopMaster refers to the act of officially recognizing the scout at a Court of Honor.

## 6.4 Scout, Tenderfoot, 2nd/1st Class Ranks

Requirements for these ranks follow the BSA advancement rules in effect at the time the software was released.

If you don't have or don't wish to enter dates for all of the requirements for these ranks, just enter the Board of Review date and TroopMaster will blanket-fill the remaining requirements with the word "Complete."

In January of 1999, BSA added several new requirements to these early ranks, and in 2001 a subsequent new requirement was added to Tenderfoot. We anticipate that another new requirement to 1<sup>st</sup> Class will take effect in 2006. If a scout completed one or more of these ranks before the rules changed, enter *N/A* next to the new requirements.

In January of 2002 BSA dropped what had been requirement 9c (Demonstrate water survival) for 1<sup>st</sup> Class, and the existing requirement 9d moved up to become the new 9c. This version of TroopMaster omits the earlier 9c requirement.

TroopMaster automatically tracks and credits the 2nd/1st Class activity requirements if you are recording unit activities in that area of the program. Only those activity types that you have marked as valid are considered. In addition, the camping minimum must be met. TroopMaster also automatically credits the 2nd Class service project requirement based on service project activities.

See para [6.3](#) for a description of the "R/P" flags.

## 6.5 Star Rank

This rank requires six merit badges including at least four from the required list for Eagle. If you are in automatic badge placement mode, TroopMaster will place these badges for you. TroopMaster also monitors the "Participation", "Position of Responsibility" and "Service Project" requirements and will automatically enter completion dates for these as soon as they are satisfied. Please see [Appendix B](#) for more information on auto-crediting of requirements.

In accordance with guidance from BSA, TroopMaster will count any of the 15 merit badges on the Eagle-required list toward the four that are required for this rank, even if two or more of the badges are from the same Eagle-required category. The categories are not a factor until a Life scout begins working toward Eagle. Please see [Appendix C](#) and also the Star rank requirements in the Boy Scout Handbook.

If you are in manual badge placement mode, TroopMaster will ensure that you enter at least four Eagle-required badges under this rank. If the scout has earned more than two non-Eagle merit badges, enter two here and apply the others to the next higher rank where they will fit. However, 12 of the 21 merit badge slots under Star, Life, and Eagle are reserved for the 12 Eagle-required merit badge categories.

See para [6.3](#) for a description of the "R/P" flags.

## 6.6 Life Rank

This rank requires five more merit badges, including three more from the Eagle-required merit badge list. However, if the scout earned more than four Eagle-required merit badges for Star, he will need less than three here (total of 7 from the current Eagle-required merit badge list). TroopMaster also monitors the “Participation”, “Position of Responsibility” and “Service Project” requirements for you and will automatically enter completion dates for these as soon as they are satisfied. Please see [Appendix B](#) for more information on auto-crediting of requirements.

In accordance with guidance from BSA, TroopMaster will count any of the 15 merit badges on the Eagle-required list toward the total of seven Eagle-required badges that are required for this rank, even if two or more of the badges are from the same category. The categories are not a factor until a Life scout begins working toward Eagle. Please see [Appendix C](#) and also the Life rank requirements in the Boy Scout Handbook.

## 6.7 Eagle Rank

When a scout earns Life, TroopMaster changes the way it counts Eagle-required merit badges. From this point on, only one badge from each of the 12 categories is counted as Eagle-required (see [Appendix C](#) and the Eagle rank requirements in the Boy Scout Handbook). TroopMaster also monitors the “Participation” and “Position of Responsibility” requirements for you and will automatically enter completion dates for these as soon as they are satisfied. Please see [Appendix B](#) for more information on auto-crediting of requirements.

## 6.8 Palms

This dialog provides a place to record advancement if a scout progresses beyond the Eagle rank. There are sufficient palms to credit advancement even if a scout earns all of the available merit badges. TroopMaster will display the next available palm whenever you select this dialog, but you can view any palm desired just by clicking the corresponding button.

## 6.9 Merit Badges-Completed

This dialog makes it very easy to enter any or all of the merit badges a scout earns. Highlight a badge, enter the completion date, and click **Add**. TroopMaster will automatically analyze the scout’s advancement records and place the new badge under the most appropriate rank. When appropriate, previously placed merit badges will be relocated.

Whenever you credit a merit badge or edit an existing one, you can optionally indicate which counselor taught the badge. Select the counselor from the list of counselors in the TroopMaster database, or manually enter the name and BSA ID number of the counselor. To see who counseled a previously credited badge, double-click the badge. If you don’t need to record which counselor taught each badge, you can turn that off through *File>Preferences*.

**The automatic merit badge placement function never adjusts or relocates merit badges credited under completed ranks. If you need to do that, temporarily remove the “Board of Review” date for that rank.**

## 6.10 Merit Badges-Partial

Use this option to track up to 15 merit badges that the scout has started but not yet completed. To add a new badge to the list, select it from the drop-down menu and click **Add**. To update any badge on the list, highlight it. For each badge, you can enter a “Start” date as well as the most recent date on which the scout completed any of the requirements. There are also checkboxes for you to mark which requirements are complete and a “Remarks” field. When the scout completes the badge, highlight it, click **Credit Badge**, and enter the completion date in the pop-up window.

You can also credit the badge from several other advancement dialogs. When you credit the scout with completion of one of these badges via this or any other dialog, TroopMaster automatically removes the badge from this list. To remove a badge manually, highlight it and click **Remove Badge**.

The system merit badge requirements list is updated whenever you install a program update patch from our web site. These updates only affect scouts who begin a badge after the changes were made—scouts who have already started a badge can optionally finish the badge under the earlier badge requirements.

After each badge, TroopMaster displays the publication year of the “Boy Scout Requirements” booklet that lists those requirements. If TroopMaster is not sure, it prints a question mark. You can manually set/change the year through the **Modify MB Reqts** button.

If BSA revises the requirements for any of the merit badges and a scout is using a different set of requirements than the ones listed, highlight the badge and click the **Modify MB Reqts** button. In addition to requirement item number fields, the *Partial Merit Badge Requirements* dialog has a “Year” field in which you can enter the publication year of the associated “Boy Scout Requirements” booklet. If you modify any of the badge requirements on that dialog, TroopMaster will erase any credit that the scout currently has entered for the badge so you’ll need to re-check the boxes for the requirements he has completed.

## 6.11 Advancement Remarks

This dialog allows you to enter advancement remarks, such as a service project description. Remarks will be printed on the Individual Progress, Individual History, and Board of Review reports. The same set of advancement remarks is used for Boy Scouts, Varsity Scouts, and Venturers.

## 6.12 Varsity Awards

For Varsity Scouts, TroopMaster tracks the Varsity Letter and the Denali Award. Both dialogs operate in generally the same manner; i.e., you enter completion dates for each of the requirements followed by an award completion date. If you prefer not to track the individual requirements, you can simply enter the award completion date and TroopMaster will blanket-fill individual requirements with the word "Complete".

TroopMaster will automatically monitor and credit the "advance a rank" requirements for the Varsity Letter and the Denali award plus the "Leadership" requirement for Denali.

## 6.13 Venturing Awards

For Venturers, TroopMaster tracks the five Bronze Awards, the Ranger Award, the Quest Award, the Trust Award, and the Gold/Silver Awards. Click the "Venturing" radio button to switch to this list. Because the Outdoor Bronze Award and the Ranger Award share the same list of core requirements and electives, these two awards share the same dialog, but there are separate "Earned" dates for each of the two awards.

For some of the Trust Award requirements and for most of the requirements for the Quest award and the Bronze Outdoor/Ranger awards, clicking on a requirement will display a list of checkboxes for tracking the associated sub-requirements. Requirements with sub-requirements are displayed in green.

All of the Venturing award dialogs operate in generally the same manner; i.e., you enter completion dates for each of the requirements followed by an award earned date. If you prefer not to track the individual award requirements, you can simply enter the award completion date.

One of the Bronze Awards should be designated as the Venturer's "primary" bronze award. This is the award that the Venturer plans to apply toward completion of the Silver Award. There is a checkbox on each of the Bronze Award dialogs for this purpose. If you don't designate one of the awards as primary, TroopMaster will automatically mark as "primary" the first award toward which you enter a requirement completion date. The reason for designating a primary Bronze Award is that TroopMaster will apply that award toward the Gold/Silver "Bronze Award" requirements. You can change which award is designated as primary at any time.

## 6.14 Sea Scout Awards

For Sea Scouts, TroopMaster tracks the Apprentice, Ordinary, Able, and Quartermaster awards. All of the Venturing award dialogs operate in generally the same manner; i.e., you enter completion dates for each of the requirements followed by an award earned date. If you prefer not to track the individual requirements, you can simply enter the award completion date and TroopMaster will blanket-fill individual requirements with the word "Complete".

TroopMaster will automatically monitor and credit the Swimming merit badge requirement for Ordinary and the Lifesaving merit badge requirement for Able if you credit those through the “Merit Badges – Completed” dialog.

For the Ordinary, Able, and Quartermaster “Electives” requirements, clicking on a requirement will display a list of checkboxes for tracking the associated electives. Similarly, for the “16 hour” work requirements for Apprentice and Ordinary, clicking the requirement will display checkboxes you can use to credit each of the hours worked.

## 6.15 Special Awards

Each scout can earn up to 100 special awards. You can select from a menu of awards you defined on the *Define Scout Awards* dialog ([para 5.3](#)), or you can click **Other** and define a new award on the fly. After selecting the award, enter the completion date in the pop-up window.

To change a date for any of the previously entered awards, double-click the entry and enter the new date in the pop-up window.

As much as possible, you should credit awards by selecting from the menu. Then, when you print a list of scouts having or needing a special award, TroopMaster searches for the exact spelling (search is not case-sensitive). If you make frequent use of the “Other” option, make sure you spell the awards consistently or the “having/needing” reports will not be accurate.

See [para 6.3](#) for a description of the “Presented” column. To toggle the “Yes/No” status of an award, highlight the award and click the **Presented** button.

## 6.16 Training Courses

Each scout can be credited for attending up to 100 training courses. You can select from a menu of courses you defined on the *Define Scout Training* dialog ([para 5.4](#)), or you can click **Other** and define a new course on the fly. After selecting the course, enter the completion date in the pop-up window.

To change a date for any of the previously entered courses, double-click the entry and enter the new date in the pop-up window.

As much as possible, you should credit courses by selecting from the menu. Then, when you print a list of scouts having or needing a training course, TroopMaster searches for the exact spelling (search is not case-sensitive). If you make frequent use of the “Other” option, make sure you spell the courses consistently or the “having/needing” reports will not be accurate.

## 6.17 Group Credit

This powerful capability makes it easy to credit advancement, awards, or training earned by a group of scouts at the same time. For example, if you start a merit badge class, you can update the partial merit badges for those scouts without having to retrieve their advancement records one at a time. Similarly, when the class is complete you can use group advancement to credit all of the scouts who earned the badge. Early rank requirements, special awards, and training courses as well as Varsity, Venturing, and Sea Scout requirements can be credited in the same manner. For LDS units, there's also a Duty to God award option.

Regardless of the item being credited, TroopMaster will automatically retrieve each of the scouts' records and make the required entries. If it encounters any problems, TroopMaster will credit as many scouts as possible and then present a results window showing the scouts on whom it had difficulties. For example, if a scout already had credit for a merit badge, he will be listed under "Duplicates". If TroopMaster reports errors for a scout, a more serious problem was encountered. You should retrieve that scout's records and attempt to credit the item manually to see what the problem was.

- a. Early Rank Requirements. This option can be used to credit any of the requirements for 1st Class and below. Select the requirements and enter the completion date. Then, select the scouts to be credited. Select multiple scouts or requirements by holding down the CTRL key and clicking the desired names or items, or by holding down the SHIFT key and clicking an entry at the end of contiguous group of names/items. Click **Process** to credit the requirements.
- b. Merit Badges. This dialog can be used to credit completed merit badges and also to add or update partial merit badges (i.e., badges in progress) for your scouts. Select the desired badge from the drop-down list and then select the appropriate scouts as described in para [6.17a](#). Then:
  - (1) Completed Merit Badges. Check the "Completed" radio button, enter the completion date, and click **Process** to credit the badge. TroopMaster will add the badge to each scout's advancement records.

For scouts who are in automatic badge placement mode, TroopMaster will place the new badge in the same manner as if you had entered it on the scout's *Merit Badges-Completed* dialog.

**If you attempt to credit a completed merit badge for a scout who is in manual badge placement mode, TroopMaster will alert you and ask if you wish to place the badge anyway. If you answer "Yes", TroopMaster will place the badge using the same guidelines as though the scout were in automatic badge placement mode. Existing badges may be relocated, as appropriate.**

- (2) Partial Merit Badges. Enter the date that the scouts last made any progress toward the badge. If any of the requirements are complete, check the corresponding checkboxes. Lastly, click **Process**. TroopMaster will examine each scout's partial merit badges. If the badge is not already there, TroopMaster will add it. If the badge is already one of the scout's partially completed badges, TroopMaster will update the badge with the new information.

If you are updating an existing badge in progress, you do not need to recheck requirements that were previously marked as completed in the scouts' records. For example, if the only thing new is that the scouts have completed requirement #6, you just need to check that one checkbox.

If a scout is working on a merit badge using a different set of advancement rules than the ones in the current system list, you cannot use the group credit feature to update his records.

- c. Varsity Awards. This option can be used to credit any of the requirements for the Varsity Letter or Denali Award. Select the award from the drop-down list. Then, select the requirements and enter the completion date. Then, select the scouts to be credited as described in para [6.17a](#). Click **Process** to credit the requirements.
- d. Venturing Awards. This option can be used to credit any of the requirements for any of the Venturing awards. Select the award from the drop-down list. Then, select the requirements and enter the completion date. Then, select the scouts to be credited as described in para [6.17a](#). Click **Process** to credit the requirements.
- e. Sea Scout Awards. This option can be used to credit any of the requirements for any of the Sea Scout awards. Select the award from the drop-down list. Then, select the requirements and enter the completion date. Then, select the scouts to be credited as described in para [6.17a](#). Click **Process** to credit the requirements.
- f. Duty to God. This option is only available to LDS units. Select the certificate and then the requirements area (e.g., Spiritual Development). Then select the specific requirements and enter a completion date. Lastly, select the desired scouts and click **Process**.
- g. Special Awards Earned. Select the desired award from the menu of awards you defined on the *Define Scout Awards* dialog, or type an award name in the "Other" field. Enter a completion date and then select the desired scouts as described in para [6.17a](#). Click **Process** to credit the award.
- h. Training Completed. Select the desired course from the training menu you defined on the *Define Scout Training* dialog, or type a course name in the "Other" field. Enter a completion date and then select the desired scouts as described in para [6.17a](#). Click **Process** to credit completion of the course.

Since it is legal to credit some special awards and training courses more than once, TroopMaster will credit duplicates as long as the completion date is different.

## 6.18 Eagle Honor Roll

This dialog lists all of your Eagle Scouts, past and present. Whenever you promote a scout to Eagle, TroopMaster will offer to add him to this list. To add a prior Eagle manually, just enter his name, the date he earned Eagle, and click **Add**. You can view the list sorted by name or date. To change an Eagle rank date, double-click the entry.

## 6.19 Duty to God

If the “LDS Unit” checkbox is checked on the *Unit General Information* dialog, this option is available through a button on the *Individual Advancement* dialog. The Duty to God dialog has a separate tab for each of the three certificates, and TroopMaster will automatically display the certificate appropriate to the scout’s age.

For each certificate, you can elect to display any of the seven areas of requirements. As the scout completes these requirements, check them off within the list box. TroopMaster will monitor your entries and when a sufficient number of requirements have been completed for a given area, you will be prompted for a completion date. When all of the dated requirements are complete, TroopMaster will automatically enter a completion date for the certificate. When all three certificates are complete, TroopMaster will credit the scout with Duty to God and add the award to the scout’s special awards list.

For LDS units, Duty to God is also an option on the Group Credit menu.

# CHAPTER 7. ACTIVITIES

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## 7.0 Overview

TroopMaster will track attendance of your scouts and adult leaders at campouts, hikes, meetings, service projects, and up to 20 user-defined activity types. Up to 2000 activities can be tracked. Activities can be entered in advance (this allows you to produce a unit calendar) or you can enter the activity and attendance at the same time. TroopMaster also provides a *Set Prior Totals* dialog so that you can credit scouts and adults for nights camped, miles hiked, etc., that they completed before joining your unit.

## 7.1 Activity Management

This dialog allows you to add new activities to your database and to review/edit any of your existing activities. Use the **Add New** button to enter new activities separately or click the **Generate Schedule** button to add groups of recurring activities, such as weekly meetings or monthly campouts ([para 7.7](#)). To remove an activity, highlight it and click **Delete**.

When you review existing activities, you can view all of them or you can narrow the review down to activities of a specific level (troop, crew, team, etc.) and/or type (camps, hikes, meetings, etc.)

- a. Add New Activity. Standard items include activity type, date, start/end times, amount, (e.g., nights camped, miles hiked, hours worked, etc.), location, and remarks. The “Activity Type” field provides a drop-down menu of types you defined on the *Define Activity Types* dialog. Click the **Define Types** button to access this dialog. Click the **Description** button to enter a text description of the activity.

To generate permission slips ([para 12.16b](#)) or a tour permit ([para 12.1h](#)) for the activity, click the respective button at the bottom of the dialog. Associated fields for the permission slips will be preloaded for you.

To schedule an email reminder click the ‘Schedule email reminder’ button. For more information on scheduling emails see [para 3.6](#).

If this is a significant activity (e.g., summer camp, a ski trip, etc.), you should create a Member Group ([para 4.4](#)) of scheduled attendees. Once you’ve done that, you can use the group to generate reports for the activity, including permission slips, plus you can use it again to credit attendance after the activity is over ([para 7.1.b\(2\)](#)).

<p>If the activity was a campout or a hike, a “Backpacking” checkbox is available: This item is used to generate the <i>Backpacking Summary</i> report (<a href="#">para 12.1e</a>) and when determining O/A Eligibility (<a href="#">para 12.9c</a>). Backpacking should <u>always</u> be entered as a both a camp <u>and</u> a hike.</p>
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If the activity was a campout, two additional checkboxes are available: “Summer Camp” and “Cabin Camp”. These items are important because TroopMaster uses these in computing “Nights Remaining” for the *Scouts Needing Camping MB* report ([para 12.31](#)), and when determining O/A Eligibility ([para 12.9c](#)).

The “Credit toward 2<sup>nd</sup>/1<sup>st</sup> Class” check box lets you decide whether or not to count each activity toward automatic credit (see [Appendix B](#)) of the 2<sup>nd</sup>/1<sup>st</sup> Class activity requirements. For example, if you hold a camp and a hike on the same day, you may only want one of the two to be credited toward these requirements. TroopMaster initially uses the default value from the *Define Activity Types* dialog ([para 7.4](#)).

- b. Edit/Review Activities. This option is most often used to mark attendance but it also enables you to review or change any previous entries. Note that in “Edit/Review” mode, you can move to the next or previous activity via the buttons provided.

To review activities of a single level and/or type, select those on the *Activity Management* dialog before clicking **Edit/Review**. The **Next** and **Previous** buttons will then let you “page” through activities of the selected level and type.

**The Delete button should only be used to remove activities that were canceled or entered in error. If you need to clear out old activities to make room for new ones, use the Delete Activities dialog ([para 7.6](#)). Otherwise, attendance totals for the activities will be lost. Attendance totals at activities removed through the Delete Activities dialog are automatically added to scout and adult amounts in the “Set Prior Totals” area.**

- (1) Combined Activities. Sometimes two or more activities are held in conjunction with one another. For example, you may have held a campout that included hiking and a service project. To save you from having to enter all of the information including attendance three times, TroopMaster provides a **Combined** button. The campout was probably entered in advance because you would have wanted it to be included on your unit schedule.

First, retrieve the campout and enter the scout/adult attendance. When finished, click **Combined** and TroopMaster will save your attendance entries, switch you to “Add new activity” mode, and erase only the “Type” and “Amount” fields. Next, change the type to “Hiking” and enter the length in the “Miles” field. If you don’t want the scouts getting double credit for the 2<sup>nd</sup>/1<sup>st</sup> Class activity requirement, clear that checkbox. Adjust the attendance, if necessary, and click **Combined** again. Lastly, make the service project entries and click **OK**. TroopMaster will save the information on all three activities.

- (2) Crediting Attendance. Crediting attendance is very flexible. For example, there are several ways to list your scouts and adults while marking attendance. This is controlled through the “List Currently Displays” field. The default list is “All Scouts” but you may prefer to mark scout attendance by patrol. To record adult attendance, select the “All Adults” option.

To mark attendance, select the applicable members by holding down the CTRL key and clicking the desired names, or by holding down the SHIFT key and clicking a name at the end of a contiguous list. Then, enter an appropriate “Attendance Marker” field and click **Apply**. Scouts and adults can be credited for attending the same activity.

If you created one or more Member Groups for scouts/adults who were scheduled to go on this activity, click the **Credit Member Group** button and select the groups that apply. Troopmaster will then mark all of the group members as attending. If someone missed the activity, clear his attendance before clicking **OK**.

Marking attendance is even easier if you enter an attendance marker and then double-click the names of the scouts and adults who attended.

If you accidentally credit the wrong person, double-click the name again to erase the entry.

**The “Attendance Marker” is very flexible. Using a letter (e.g., X) to mark attendance gives the scouts credit for the entire activity amount (e.g., night camped, miles hiked). On the other hand, numbers have special meaning. For campouts, a numeric attendance marker overrides the “Nights” field. For example, if a scout only stayed for the first night of a two-night campout, change his attendance marker from X to a 1 (one), and he will just get credit for one night. If he came for the day but did not spend the night, enter a zero. Numbers can also be used for other activity types. This lets you make individual entries for things like service project hours worked, miles hiked, etc.**

Non-numeric entries must be a single character. Numeric entries can be four digits. TroopMaster will also track tenths. For example, when crediting service hours you might use a marker of **2.6** hours.

An asterisk (\*), if entered in the attendance column, indicates that the individual did not attend but was excused. Excused absences are not considered when computing attendance percentages for the Unit *Participation Summary* report.

Use non-numeric entries to record things other than simple attendance. For example, an entry of **E** on a campout could indicate the scout attended and had an equipment inspection.

## 7.2 Activity Calendar

This dialog is a very handy desk reference calendar that’s integrated with your scheduled activities. Dates with scheduled activities are boxed with the color of the box indicating the activity type. A legend is displayed at the bottom. If there are two or more activities scheduled for the same date, the box background changes to black.

Click a boxed date to view details on the associated activity or click an open date to add a new activity. To change the associated color of one of the activity types, click on its entry in the legend and then click on the colored box next to that type..

If you position your mouse over a date, TroopMaster will display a short summary of the activity(s) scheduled for that date.

TroopMaster also has a *Unit Calendar* report ([para 12.1j](#)).

## 7.3 Set Prior Totals

This option helps ensure that the grand totals for each scout and adult are accurate. Use this dialog to enter nights camped, miles hiked, service project hours, etc., that the scout/adult completed before joining your unit. For the *Unit Activity Totals* report and the *Individual History* reports, TroopMaster will add these entries to the amounts in your active database. Prior totals can optionally be included on the *Individual Participation* and *Participation Summary* reports.

Because there are no dates associated with your entries, “prior” entries are not included on any activity reports that use “From-To” dates. For the same reason, “prior” camping is not considered when computing O/A eligibility.

## 7.4 Define Activity Types

TroopMaster tracks scout and adult participation in as many as 24 different types of activities. Since camping, hiking, meetings, and service projects are the most commonly used types, these are pre-defined for you and cannot be changed. You can create additional activity types to satisfy the specific needs of your unit. For example, you might want to track outings, canoeing, unit committee meetings, etc.

For each new type, enter a name (which must be unique) and, if desired, a field label to be used for the activity “amount” field. If you want the activity type to be counted toward automatic credit (see [Appendix B](#)) of the 2nd/1st Class activity requirements, enter a check mark in the field provided. To set or change the associated color for an activity type, click the box to the left of the type name and then choose a color from the pop-up palette. Colors are used on the *Activity Calendar* dialog ([para 7.2](#)).

TroopMaster automatically monitors and credits the activity requirements for the 2nd/1st Class ranks. The checkbox setting in the “Credit toward 2<sup>nd</sup>/1<sup>st</sup> Class” column on this dialog will be used as the default value when you create activities of this type, but you can adjust that if desired for any specific activity.

If you change an activity type name on this dialog, TroopMaster will offer to change the name on all of the exiting activities that were assigned to the old type.

If you define minimum attendance percentages for selected activity types, then when you run the *Participation Summary* report ([para 12.1g](#)) and select the “Attendance Percentages” option, TroopMaster will flag scouts who failed to meet these minimums.

If you create an activity type of “Driving”, you can use the attendance feature to keep track of how many miles each of your adults has driven in support of your unit. At the end of each year, you could then print *Individual Participation* reports for those adults, who could use them for tax purposes.

Sea Scout units should define an activity type of “Cruises” with an amount label of “Nights”.

## 7.5 Define Activity Levels

Use this option to add new activity levels to the system. For example, you might want to have an activity level for each of your patrols. To add a new level, enter the name and click **Add**. To remove an existing level, highlight it and click **Remove**.

## 7.6 Delete Activities

This option enables you to clear out your files when you reach the system limit of 2000 activities. Activities can be deleted by “From-To” period and by activity types/levels. This flexibility allows you to selectively clear activities like old meetings from your files while retaining more important activities, such as camping and hiking. For deleted activities, TroopMaster will total the amounts (e.g., nights camped, miles hiked, etc.) for each member and add those to his *Activities>Set Prior Totals* amounts.

To avoid having unwanted amounts being added to scout/adult “prior” totals, delete erroneous activities through the *Activity Management* dialog or by displaying the activity and clicking **Delete**.

## 7.7 Generate Schedule

This option makes it easy to create a schedule of weekly, bi-weekly, or monthly activities and add those to your activities file. For example, let’s suppose you want to create a schedule of weekly meetings. Select type “Meeting” from the drop-down list. Then, check “Include on calendar” since you definitely want your meetings on your unit calendar. Meetings don’t count toward completion of the 2<sup>nd</sup>/1<sup>st</sup> Class activity requirements, so leave that checkbox blank. Enter an amount (usually zero unless you’re using some type of point system), your meeting location, and remarks, if desired.

Then, enter the date of the first scheduled meeting in the “From” field and the date of the last meeting in the “To” field. Select the “Weekly” option. Lastly, click **Generate** and TroopMaster will automatically create a full schedule of meetings based on the weekday of the first meeting date, and it will display the generated dates in the list box.

Before saving these meetings to your activities file, check the list for holidays, etc. For example, if there will be no meeting during Christmas week, highlight that date and click **Remove**. When all of the remaining dates are correct, click **Save** and TroopMaster will add all of the scheduled meetings to your activities file.

# CHAPTER 8. ADULTS

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## 8.0 Overview

In addition to adult members of your unit, TroopMaster allows you to track points of contact, and merit badge counselors.

## 8.1 Adult Members

This area allows you to track adult members of your unit. Because some units want to be able to track attendance for adults who are not strictly unit leaders, there is a checkbox to indicate which adults should be included on adult leader reports.

- a. Adult Management. This dialog allows you to add new adults to the unit and to edit/review data on existing adults. The **Add New** and **Personal Data** buttons access the same tabbed dialog for data entry. Additional buttons allow you to access the other areas of each adult's records. If you need to delete or archive an adult, use the **Del/Archive** button on this dialog or on the adult personal data dialog.

(1) Personal Data. A brief description of each tab follows.

- (a) Personal #1. In addition to name and address, this tab has fields for date of birth (DOB), social security number (SSN), and driver's license number/state. Green labels denote fields that are required for ScoutNET reports ([para 12.11g](#)), but the fields are only mandatory for adults who have been or will be assigned leadership positions. A separate mailing address field is available if the adult's mailing address is different from his street address. If the new adult was a Boy Scout, enter the highest badge earned. If he is an Eagle Scout, enter the date he earned his Eagle. If you want to attach a photo of the adult, click the **Photo** button and browse to the appropriate JPG, GIF, or BMP file. You can create family links to parents, merit badges counselors, and POCs. Please see [Chapter 15](#) for more information on family links.

**Many units have requested the data field for social security number but collecting SSN's raises Privacy Act issues. You should consult an attorney before doing so.**

The adult's formal first name will be used on reports that go to council, but normally his nickname will be used on all other displays and reports. If desired, you can use formal names throughout the program--see the *File>Preferences* option.

The "Became Leader" date is used in conjunction with "prior service" and leadership history entries to compute service stars for the *Court of Honor* report. If the leader has had breaks in service, enter the date he began his current service in this field and enter previous periods of service on the "Prior Service" tab.

The "Joined Unit" date is used when computing attendance percentages.

The “Highest Badge Earned” field is considered when computing O/A eligibility. To be eligible, adults who are under 21 must have reached at least the 1<sup>st</sup> Class rank.

If all or most of your adults have the same area code, enter that on the *Preferences* dialog and TroopMaster will use it as the default for all phone number fields.

To email an adult, just click the button next to his email address.

- (b) Personal #2. This tab lets you record medical information including the date for each class of physical exam. The “Special Needs” field is there in case the adult has a special condition that should be recorded. If so, you should click the **Description** button to more fully describe the condition. The vehicle and insurance fields are provided in case the adult does not have a son in the unit. Data entered in these fields can be included on the *Unit Vehicles* report and the *Tour Permit Assistance* report. If this adult is linked to a specific parent, you may also choose to link the vehicle information between the two records as well.

**Special needs codes and the corresponding descriptions will be included in your *Annual Recharter* report for ScoutNET.**

- (c) Prior Service. If the leader had breaks in service, enter the date he began his current service in the “Became Leader” field on the “Personal #1” tab. Enter the “From-To” dates of previous service on this tab. For each line entry, there are also fields for level, unit number, and council number. Prior service is used in conjunction with current service and leadership history when computing service stars for the *Court of Honor* report.
- (d) Remarks/Other. This tab provides a place for you to enter information for which there are no pre-defined data fields. In addition to a remarks field, there are eight user-defined fields: four text fields and four checkboxes. You can enter your own label for any of these fields through the **Define Field Labels** button. For example, you might redefine one of the text field labels as “Hobbies” or use one of the checkboxes to indicate “Fees Paid”. TroopMaster has a special adults report for the user-defined data fields.

This tab also has four fields through which you can link external files, such as a Word document, to the adult. To do that, just click the browse button and select the desired file. Use the **Define Field Labels** button to label each field. Once you have done that, you can click on the field label button to open the file. To remove a file, just erase the path/file name.

Field labels you define for any adult will be used for all of your adults.

When you click **OK**, TroopMaster will save your entries. If you are in “Add” mode, TroopMaster will clear the display so that you can add another adult, if desired. Since city, state, and zip code are often the same or similar for all adults in a unit, those fields will not be cleared. Click **Cancel** when you are finished adding adults.

If the “LDS Unit” box is checked on the *Unit General Information* dialog, then whenever you add a new adult, TroopMaster will ask you to assign the new member to the troop, team, and/or crew Member Group(s), as appropriate ([para 4.4](#)).

If you are in “Edit/Review” mode, several additional buttons are available. Quick access buttons will take you directly to any adult’s awards, training, leadership and O/A dialogs. **Previous** and **Next** buttons allow you to “page” through your adults.

To archive or delete an adult, click **Del/Archive**. A pop-up dialog gives you the option of archiving ([Chapter 13](#)) the adult before he is deleted.

- (2) Special Awards. Each adult can earn up to 100 awards. Select from a menu of awards you defined on the *Define Adult Awards* dialog ([para 8.1d](#)), or click **Other** and define a new award on the fly. Enter a completion date in the pop-up window. To modify the completion date of an award, double-click the award and enter a new date in the pop-up window.

As much as possible, you should credit awards by selecting from the menu. The reason for this is that when you print a list of adults having or needing a special award, TroopMaster searches for the exact spelling (search is not case-sensitive). If you make frequent use of the “Other” option, make sure you spell the awards consistently or the “having/needing” reports will not be accurate.

See [para 6.3](#) for a description of the “Presented” column. To toggle the “Yes/No” status of an award, highlight the award and click the **Presented** button.

- (3) Adult Leadership. This dialog handles the adult’s current leadership assignment(s) and leadership history.
  - (a) Current Positions. To assign a leader to a position, select it from the drop-down menu of leadership positions. If the desired position is not on the menu, click the **Define Positions** button and add it. You can assign up to four current positions to each leader.

To remove a leader from a previously entered position, select the blank position from the drop-down list and enter the date he vacated the previous position.

When a leader changes leadership positions, the vacated position is automatically moved to the leadership history list. The “Effective Date” of the new position is used as the closeout date of the old position.

When you assign a leader to the Patrol Advisor position, you can optionally select a patrol name from the pop-up menu. If you do, that leader will be printed with his patrol on the Patrol Roster. Patrol Advisors are listed as Assistant Scoutmasters on the *Annual Recharter* report.

- (b) Leadership History. This area allows you to enter previous positions (maximum 15) in which the adult served. To add a position to the list, select it from the drop-down menu. Enter the “From-To” dates and click **Add**. To remove a position from the list, highlight the position and click **Remove**.

Leadership history is included on the adult’s *Personal Data* report. If a leader serves in more than 15 positions, the oldest one is dropped when a newer one is added to the list. Leadership history is used in conjunction with current service and prior service when computing service stars for the *Court of Honor* report.

- (4) Training. Each adult can be credited with up to 100 training courses. Select from a menu of courses defined on the *Define Adult Training* dialog ([para 8.1e](#)) and then enter a completion date in the pop-up window. To modify the completion date of a course, double-click the course and enter a new date in the pop-up window.
- (5) Order of the Arrow (O/A). Click this button to enter or review O/A data on the selected adult. See [Chapter 11](#) for more information.
- (6) Mic-O-Say. Click this button to enter or review Mic-O-Say data on the selected adult. See [Chapter 10](#) for more information.
- b. Group Credit. This feature makes it easy to credit special awards or training completed by a group of adults at the same time. For example, if several of your adults complete CPR, you can update their training records without having to retrieve them one at a time. If TroopMaster reports errors for an adult, you should retrieve that adult’s records and attempt to credit the item manually to see what the problem was.
- (1) Special Awards Earned. Select the desired award from the menu of awards you defined on the *Define Adult Awards* dialog, or type an award name in the “Other” field. Enter a completion date, select the desired adults, and then click **Process** to credit the award.
- (2) Training Completed. Select the desired course from the training menu you defined on the *Define Adult Training* dialog. Then, enter a completion date, select the desired adults, and then click **Process** to credit completion of the course. Click the **Help** button to view a list of courses BSA requires for an adult to reach “trained” status.
- c. Define Adult Leadership. TroopMaster comes with a menu of adult leadership positions. Use this dialog to define additional ones, if needed. Your entries will appear on a positions menu that is presented whenever you assign a position to one of your adults. User-defined positions are flagged with an asterisk on this dialog, and they are always treated as “Committee Member” on the *Annual Recharter* report.
- d. Define Adult Special Awards. Use this dialog to define the most common special awards presented by your unit. Your entries will appear on an awards menu that is presented whenever you credit an adult with an award. However, you can credit awards that are not on the menu by using the “Other” option ([para 8.1a\(2\)](#)).

- e. Define Adult Training Courses. TroopMaster comes with an extensive menu of official BSA training courses. Use this display to define additional courses or edit existing courses, if needed. Your entries will appear on a training course menu that is presented each time you credit an adult with a course.

**TroopMaster internally tracks training by course code so please ensure that you enter the correct BSA course code for any courses you add. If there is no official course code, you'll need to define one but choose something BSA is not likely to use later (e.g., XX1).**

Although BSA does not publish training expiration periods for any of their courses, many of the local councils have done so for certain courses. Expiration periods you enter here will be used by the software to determine which adults need retraining.

- f. Retrieve from Archive. If an adult you archived later returns to your unit, you can retrieve his data through this option. See [Chapter 13](#) for more information on use of the archive.

- g. Receive Adults From Another Unit. You can electronically receive adults from another unit using TroopMaster if that unit creates a set of transfer files (see below). Enter the path to the transfer files and click **OK**. This function will import virtually all of the data on each adult except fundraiser data and attendance at specific activities. However, it will store each adult's total attendance (i.e., total nights camped, total miles hiked, etc.) in the *Activities>Set Prior Totals* area ([para 7.3](#)).

If the other unit also transferred scouts, see [para 5.10](#).

- h. Transfer Adults To Another Unit. If some of your scouts and adults are moving to another unit that uses TroopMaster, this option will create a set of transfer files that will save the other unit leader from having to enter the scouts and adults manually. Running this option will not delete the scouts and adults from your unit.

First, enter the target location (usually a diskette) for the transfer files. Then, highlight all of the transferring scouts and adults and click **Transfer Members**.

**You must transfer all of the departing members before leaving this dialog. Each time you use this dialog, TroopMaster creates a new set of transfer files. Previously created transfer files, if any, will be erased.**

This same dialog is accessible through the *Scouts* menu.

## 8.2 Merit Badge Counselors (MBCs)

This menu option allows you to add new counselors to the unit and to edit/review data on existing counselors. The **Add New** and **Edit/Review** buttons access the same data entry dialog. You can assign merit badges to each counselor by highlighting the desired badges and clicking **Add**. The MBC dialog has fields for tracking counselor training as well as original certification and recertification dates. You can also create family links to the parents, adults, and POCs files. Please see [Chapter 15](#) for more information on family links.

To assign a badge quickly, just double-click the badge name.

To remove a counselor, click **Delete** on either the *MBC Management* dialog or the individual counselor dialog. You will be asked to confirm the request before the counselor is removed.

## 8.3 Points of Contact (POCs)

This provides a powerful tool for tracking information on people who are important to the operation of your unit but who are not necessarily adult members. District leaders are obvious examples, but the list also includes parents with specific skills or interests that could be helpful to the unit.

- a. POC Management. POCs are people whom you need to call upon from time to time but who are not necessarily members of the unit. This menu option allows you to add new POCs to the database and to edit/review data on existing POCs. The **Add New** and **Edit/Review** buttons access the same data entry dialog. Most data fields are self-explanatory, but the “Category” and “Skills/Interests” fields provide special flexibility on reports.

Because the types of people entered as POCs are frequently diverse, it is helpful to be able to group them into categories. You can define up to 20 different categories on the *Define POC Categories* dialog (see below). Then, when you add a new POC, simply assign him to a category from the drop-down list. The *POC List* report includes options to select a specific category or to group your POCs by category. You can create family links to the parents, adults, and merit badge counselors files. Please see [Chapter 15](#) for more information on family links.

The “skills/interests” fields are designed to handle parent resource information, but you will probably think of additional uses. You can enter up to 20 skills/interests for each POC. The *POC List* report includes options to search for POCs with specific skills/interests. TroopMaster comes with an extensive list of skills/interests but you can define others as needed.

To remove a POC, click the **Delete** button on either the *POC Management* dialog or the individual POC dialog. You will be asked to confirm the request before the POC is removed.

To review POCs assigned to a specific category, select the category on the *POC Management* dialog before clicking “Edit/Review”. The **Next/Previous** buttons will then take you to the next/previous POC in that same category.

- b. Define POC Categories. You can make your reports more flexible and useful if you group your POCs into categories. For instance, you could create categories for District Leaders, Religious Leaders, Troop Resources, etc. Then, when you add a new POC to your database, you can assign him/her to the appropriate category.
- c. Define Skills/Interests. Use this dialog to add new skills/interests to the system-defined list or to remove existing ones.

# CHAPTER 9. FUNDRAISERS

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## 9.0 Overview

TroopMaster will track information on any type of fundraiser that involves sales. You can track sales of individual products, dollar amounts due, and payments made by your scouts and adults. To help you get started, a popcorn sale is pre-defined. The popcorn prices listed are not official prices--please adjust those as necessary.

## 9.1 Create/Edit Fundraiser

This dialog is used to create a new fundraiser or modify an existing one. You enter a unique name for the fundraiser and the name/retail price of up to 24 products to be sold. You can optionally enter a wholesale price for each item (if you do, TroopMaster will use this to compute profit) and you can specify if the fundraiser allows unsold items to be returned. If you check the “Fundraiser in Progress” checkbox, TroopMaster will use this fundraiser as the default when you credit scout payments or generate reports.

The **Delete** button lets you completely remove an old fundraiser. For annual fundraisers, like popcorn sales, the **Erase Sales** button lets you clear out the old sales and payment information so that the new sale can be started. The existing products and prices are retained, but all existing sales and payments are deleted.

**Be sure to print any desired reports before erasing sales or deleting a fundraiser.**

If you would like to retain fundraiser information from previous years, you could use the current year as part of the fundraiser name (e.g., “Popcorn 2008”). You can then create a new fundraiser called “Popcorn 2009” for the following year. However, the database is limited to 50 fundraisers.

## 9.2 Sales & Payments

This dialog lets you enter product sales and payments made by each scout or adult. These include total quantities sold for each of the items in the fundraiser and, if allowed, any returns on those items. You can also enter the date and amount of each payment made by the member. The dialog also shows the “Total Paid”, “Total Amount Due”, and “Balance” for each member. In addition, there’s a field where you can designate each member’s prize or commission.

# CHAPTER 10. Mic-O-Say

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## 10.0 Overview

Use this option to record Mic-O-Say membership information on scouts and adults.

Mic-O-Say is a program similar to Order of the Arrow for scouts in the Midwest. TroopMaster supports this program but if you don't need this feature, uncheck the associated checkbox on the *File>Preferences* dialog and TroopMaster will remove these options from your menus the next time you start the program.

The Mic-O-Say program varies somewhat between councils and, as much as possible, this feature was designed to handle those differences. Accordingly, there may be options that are not applicable to your tribe; for example, not all tribes have a "She-She-Be" council

## 10.1 Adult Mic-O-Say

In addition to date fields for Foxman, Brave, Warrior, and Honored Woman, TroopMaster has checkboxes to indicate membership in the Tribal Council and/or She-She-Be Council. TroopMaster also tracks up to six prior leadership levels. Whenever you enter a new level for an adult, TroopMaster automatically adds his previous position to his level history.

## 10.2 Scout Mic-O-Say

Mic-O-Say information on scouts is tracked in the same manner as for adults.

# CHAPTER 11. ORDER OF THE ARROW

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## 11.0 Overview

Use this option to record O/A membership information on scouts and adults.

## 11.1 Adult O/A

In addition to date fields for Election, Call Out, Ordeal, Brotherhood, and Vigil, TroopMaster provides fields for Vigil name, O/A leadership position, and remarks. TroopMaster also tracks up to six prior leadership positions. Whenever you enter a new leadership position for an adult, TroopMaster automatically adds his previous position to his leadership history.

Special *O/A Eligibility* and *O/A Membership* reports are available.

## 11.2 Scout O/A

O/A information on scouts is tracked in the same manner as for adults.

Special *O/A Eligibility* and *O/A Membership* reports are available.

# CHAPTER 12. REPORTS

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## 12.0 Overview

All system reports are included under this option. The reports are divided into 17 functional groups, each of which is described below. All reports are initially sent to the screen. Because “a picture is worth a thousand words,” only a brief description of each report is provided below.

Most reports have several and often many different generation options. For example, the *Individual Progress* report lets you choose specific scout(s), all scouts in the unit, or all scouts whose advancement has changed since the last time you printed their reports. You can also elect to include an advancement summary and/or a list of partial merit badges.

For each report, select the desired options and click **OK**. Displayed reports can be printed, emailed, or saved to a disk file.

Many reports allow use of the “filtered selection” option for scouts, adults, etc. For more information on the use of this option and the associated “member groups” option, please see para [2.12](#) and para [4.4](#).

See *File>Preferences* ([para 3.17](#)) for information on adjusting your page settings, mailing labels settings, fonts, colors, display scrolling, etc.

All reports are initially displayed on the screen and the display is very flexible. For example, there’s a drop-down list at the top of the display dialog that allows you to zoom in or out on a report (you can also do this through the left/right mouse buttons). You can even elect to display two pages at the same time. The left/right arrow buttons on the dialog allow you to page the report, or you can use the Page Up/Down buttons on your keyboard.

A tools button lets you modify the format settings for the report currently being displayed (you can permanently change the settings through *File>Preferences*). Other buttons allow you to print the report, email it, or save it to disk. If you elect to save the report to a disk file, the report is generated and written to a file you specify using any of three optional formats:

- (1) PDF - Select this format if you want to save your report as a PDF file.
- (2) Web Page (HTML) - select this format if you want to be able to review the report with your web browser. Most reports will display in your browser almost identically to the way they appeared in TroopMaster. However, matrix-style reports will lose their vertical and horizontal line separators.
- (3) Rich Text - Select this option if you plan to review and/or edit the report with your word processor. Most reports will display in your word processor almost identically to the way they appeared in TroopMaster. However, matrix-style reports will lose their vertical and horizontal line separators.

- (4) Plain Text - Select this option if you plan to review the report with a simple text editor, such as Windows Notepad. Reports saved in plain text will lose most of their formatting; i.e., special fonts, point sizes, bold column headers, etc., will be dropped. Just the text itself will be saved to the file.

TroopMaster remembers your current working folder and will use it as the default, but you can change that if you wish, and you can use any name you like for the report file.

Several reports (e.g., *Merit Badge Matrix*, *Attendance Matrix*) are produced in a spreadsheet format with column headers at the top of the report. The default settings will print the column headers vertically to make them easier to read. However, if you are saving your report to disk or emailing it, you will need to specify the “Horizontal” table headers option when producing these reports. HTML, Rich Text, and plain text do not support vertical text.

If you choose to email a report, TroopMaster will create a new message and attach the report in any of the three optional formats (i.e., PDF, HTML, Rich Text, or plain text) described above. It will then bring up the *Send Email* dialog ([para 3.5](#)) so that you can choose the recipients before sending it.

You can easily email an entire set of individual member reports, one message/report per member. For example, you could generate a set of *Individual Progress* reports on all of your scouts and then email them to the scouts using almost the same procedure you use for sending a single report. However, in this case, when TroopMaster brings up the *Send Email* dialog, each of the scouts will already be listed in the “To” list box, and you will not be able to change the recipient list. When you click Send, TroopMaster will automatically create a separate message for each scout and attach that scout’s report to his individual message. For more information on sending email messages from TroopMaster, please see [para 3.5](#). Since in this case there are multiple messages, the “Display message prior to sending” checkbox is deactivated. Therefore, if you want to add or change the text of the message itself, you must do that on this dialog before clicking **Send**. The email addresses that TroopMaster will use for each scout is based on the checkbox settings you’ve selected on the scout’s personal data dialog ([para 5.1a\(1\)](#) and [para 5.1a\(3\)](#)).

## 12.1 Activities

These options include all of the reports related to your unit activities, including camping, hiking, service projects, and user-defined activity types.

Activity reports can be generated with or without specifying a date range. If no dates are specified, all activities of the selected type(s) will be included on the report. If only a “From” date is entered, activities on or after that date will be included. If only a “To” date is entered, activities on or before the “To” date will be included.

Entries you may have made on the *Set Priors* dialog are not included on activity reports that use “From-To” dates because TroopMaster has no way of knowing when the “priors” were done. “Prior” amounts are included on the *Unit Activity Totals* report and can also be included on the *Individual Participation* and *Individual History* Reports.

- a. Individual Activity Report. Select one or more activities and TroopMaster will print all activity information, including attendance and the text description, if any.
- b. Activities by Type. This report provides detailed tracking of a specific activity type. It lists all of the activities of the requested type for the specified time period and then optionally includes attendance matrices for scouts and/or adults.

If you request an attendance matrix, the report is limited to a maximum of 63 activities. On the matrix, the date of each activity is listed vertically at the top of each column. The total attendance for each activity is listed vertically at the bottom of each column. Individual totals are shown on the right-hand side of the report along with an optional grand total.

For camping and hiking, you can limit the report to backpacking activities through a checkbox at the bottom of the dialog.

- c. Activities List. This report chronologically lists all unit activities (calendar and non-calendar) for the specified time period. You select the activity type(s) to be included and either activity amounts or attendance percentages. The total number of activities of each type is shown at the bottom. If desired, you can also include the text description of each activity.

Whenever you enter or change attendance for an activity, an attendance percentage is computed based on the number of scouts attending divided by the number of scouts in your unit on the date you marked/changed attendance. That means that you'll still get the same attendance percentage for an activity even if most of the original attendees later leave the unit. NOTE: For activities that were converted from data in a previous version of TroopMaster, the attendance percentage for each activity is based on the number of attendees divided by the number of scouts who were in your unit on the date the data was converted.

- d. Attendance Matrix. This report serves two purposes: (1) a data collection form to record attendance at unit activities, and/or (2) a report for viewing previously recorded attendance at activities. You can generate the report for scouts and/or adults and optionally include each member's phone number. Other options allow you to include attendance totals for each column and to specify a report title.

If you select more than one activity type on this report, you should also select the "Include activity type" option. This will make the report more meaningful.

- e. Backpacking Summary. Based on a time period you specify, this report lists backpacking totals for each scout/adult, including total nights camped and total miles hiked. In generating the report, TroopMaster looks for camps and hikes in your activity database for which the "Backpacking" checkbox is checked. The number of "Events" on this report is based on the number of camps for which the "Backpacking" box is checked. Backpacking should always be entered as a both a camp and a hike.

- f. Individual Participation. This option generates a separate report for each scout/adult selected. Specify an optional time period and select the activity type(s) to include, and TroopMaster will list all qualifying activities that the selected scout(s) or adult(s) attended. Optional totals are provided at the bottom of the report. Attendance percentages and ratios are based on the number of activities of that type that the member attended versus the number that the member could have attended. If desired, you can limit the camps/hikes included to just backpacking events. If no dates are specified for this report, you can optionally include amounts listed in the *Set Priors* area.
- g. Participation Summary. This is actually a group of six reports, three for your scouts and three more for your adults. You can select amount totals, attendance ratios, or attendance percentages on one or more activity types. For each scout/adult, TroopMaster will print two figures (separated by a slash) for each of the selected type(s). The first figure is the total number of activities of that type that the scout/adult attended. The meaning of the second figure varies based on the report option you chose:
- (1) Amount Totals. The second figure is the total number of nights camped, miles hiked, service project hours worked, etc., for that activity type. For activities like meetings, the total amount is usually zero.
  - (2) Attendance Ratios. The second figure is the total number of activities of that type that the scout/adult could have attended.
  - (3) Attendance Percentages. The second figure is the first figure divided by the total number of activities of that type that the scout/adult could have attended, expressed as a percentage. In computing percentages for each scout, TroopMaster always ignores activities that were held before he joined your unit but you can optionally exclude activities that were held prior to his most recent date of rank—some units use this figure when evaluating his participation level for his Board of Review. If you've defined minimum percentages for your activity types ([para 7.4](#)), TroopMaster will flag scouts who failed to meet those minimums with asterisks.

Unless you select the “ratios” option, you can elect to include a summary block at the bottom of the report. If you select “Amount Totals”, the summary can optionally show the total number of activities of each type and the total amount (e.g., 6 campouts for 12 nights) that the unit held, or the total amounts by activity type for all of your scouts (e.g., the total number of nights that all of your scouts camped). If you select the “Attendance Percentages” option, the summary will show the total number of activities for each type that the unit held and the average attendance percentage for your members.

**If a scout/adult missed an activity but was either excused ([para 7.1b\(2\)](#)) or was not yet a member of your unit (based on his “Joined Unit” date), that activity will not be considered in his attendance ratios or his attendance percentages.**

If you select the “Amount Totals” option, you can also include “Prior Totals”. If you do, any amounts that the member has entered in the *Activities>Set Prior Totals* area will be added to the amounts in your active database. This will be indicated by a plus sign next to the number of activities attended. For example, if a scout attended 7 campouts for a total of 14 nights but he also has 10 nights in the “Set Prior Totals” area, he would have “7+/24” in his “Camping” column.

h. Tour Permit Assistance. This option makes it easy to produce a report that contains virtually all of the data needed for a Tour Permit. Your council may allow you to sign the official BSA tour permit form (to satisfy the legal requirements) and simply attach the TroopMaster report (to provide the details). You will enter the needed information on three tabs:

(1) General Info. The fields on this tab are taken directly from the official form. Select a leader and an assistant from the drop-down list of your adult members. Enter the departure and return dates, the numbers of scouts/adults going, and the type of trip. If swimming/boating or climbing/rappelling are involved, list the leaders and their associated certificate dates.

(2) Itinerary. For each leg of the trip, enter departure/destination points and the number of miles. If that leg involves an overnight stop, enter the location and indicate whether reservations have been made. Then, click **Add Waypoint** and TroopMaster will add it to the end of the list. If you need to insert a waypoint, highlight the immediately preceding waypoint before clicking **Add**. If you need to adjust the sequence of a waypoint, highlight it and click **Move Up** or **Move Down**. To delete a waypoint, highlight it and click **Remove**. TroopMaster automatically keeps a running total of mileage at the bottom of the dialog but you can manually enter a total, if desired.

(3) Transportation. Use this tab to select your drivers/vehicles and to select the mode(s) of transportation to be used. The “Driver” drop-down list contains all of the adults and parents who have vehicle information in their records. When a driver is selected, the “Vehicle” drop-down list contains that person’s vehicle(s) plus the unit vehicle (if any). Select each driver and vehicle, enter the number of passengers, and click **Add Vehicle**. To delete an entry, highlight it and click **Remove**.

TroopMaster will save any information entered for a *Tour Permit Assistance* report until you click the **New Tour Permit** button. This allows you to get started on your tour permit well before the date it must be submitted. The **New Tour Permit** button erases all existing entries.

i. Unit Activity Totals. For the activity type(s) selected, TroopMaster lists grand totals for scouts or adult leaders. The totals include all activities in your active database plus any “prior” amounts ([para 7.3](#)) for each type. If you include “Camping” but you just want tent camping totals, un-check the “Include cabin camping” box.

For all activity types, the figures represent the total “Amount” for each type (i.e., nights camped, miles hiked, etc.). These figures do not represent the total number of activities attended. For example, the amounts for meetings are usually zero.

- j. Unit Calendar. This report includes all of your scheduled calendar activities for the specified type(s) and time period. This report can be generated either as a list-type report with activities grouped by month, or in a one-page-per-month, “wall-calendar” format.

If your unit has a “theme of the month,” limit the report to the appropriate time period and enter the theme in the field provided. TroopMaster will include your theme as a sub-header on the report.

## 12.2 Adult Members

Reports specific to your adult members are in this area. Reports that can also include scouts, such as the *Annual Recharter* report, *Medical/Special Needs* report, custom reports, and reports related to activity attendance, are on other reports menus. You can include all of your adult members on these reports, limit them to just unit leaders or just non-leaders, or use a filtered selection ([para 2.12](#)).

- a. Individual Personal Data. This report lists all of the personal data on a selected adult. It also includes special awards earned and training courses completed.
- b. General Purpose Worksheet. This extremely flexible worksheet can be used for a multitude of purposes. For example, you could use it as a data collection worksheet by giving it a title and defining one or more column headers. Optionally, you can choose to include selected items from the adults data file, such as dates of birth or current leadership positions. You can specify 5-column or 10-column options, but if you need a large text column, one of the options on the database drop-down list is “Use rest of line”. If you select that option, that column will extend to the edge of the report.

If you think you might use the same worksheet again, click the **Save** button and assign it a file name. Then, the next time you need the worksheet, just select it from the drop-down list. If there’s a saved worksheet that you no longer need, select it from the list and click **Delete**.

- c. Having/Needing Awards/Training. This is a group of four reports that provide lists of adults who either have or need a specific training course or special award. Choose an award or course name from the menu or type a name in the “Other” field.

When you request the “Needing Training” report, you can optionally include adults whose training is old. To do that, click the “Include adults who need retraining” checkbox and enter a date in the “Earlier than” field. The report will then include all adults who’ve never had the training plus those whose completion dates are earlier than the date you specify.

BSA has not established expiration periods for any training courses but if your local council has, you can enter those through the *Adults>Adult Members>Define Training* option. If you do, adults whose training has expired will be flagged with a pound sign on *Adults Having Training* reports. If you check the “Include adults who need retraining” box on the *Adults Needing Training* report, TroopMaster will automatically compute an expiration date for the “Training earlier than” date field. For example, if the course has a 2-year expiration period and you run the report on 7/2/09, TroopMaster will enter a date of 7/2/07.

For *Adults Needing Training*, you can optionally choose to contact, either through email or postal mail, the adults who need the training. If you do, then when you close the report, TroopMaster will display either the *Send Email* dialog or the *Adult Mailing Labels* dialog, as appropriate. If you send the message or print the labels, only the adults who were listed on the report will be included.

- d. Leader Phone List. This report lists your adults' names, addresses, phone numbers, and leadership positions. Email addresses can optionally be included. O/A members are flagged with asterisks.
- e. Training List. For each adult, this report lists all of the training courses completed and the associated completion dates. It also shows email addresses and home phone numbers.
- f. Training Matrix. This option generates a spreadsheet report of selected adults along with the completion status for each of the selected training courses. This report makes it easy to see which adults need specific training courses. Training completion is marked with an "X". If an adult's training has expired ([para 12.2c](#)), the course is marked with a pound sign ("#").
- g. Training Status Details. For each of your adults who holds a leadership position, this report shows the position, effective date, and training status with respect to the training courses required to be fully trained for that position. If an adult holds more than one position, he will be listed once per position. A legend at the bottom explains the meaning of the training status codes. The report also shows the percentage of the unit leaders who are trained and the percentage partially trained.

BSA "grandfathered" some courses so, for example, an adult who completed ScoutMastership Fundamentals (S21) will be marked as trained regardless of whether any of the newer courses have been completed.

- h. User Defined Fields/Remarks. This option provides a powerful way of producing special reports on your adults. TroopMaster lets you select any or all of the user defined fields from the adult personal data display ([para 8.1a\(1\)\(d\)](#)). The report then lists each of your adults and the selected data item(s).

Use this option to produce reports that are not otherwise available in TroopMaster. For example, you could define a field for hobbies and then print a "Leader Hobbies" report.

## 12.3 Awards/Advancement

These are the most versatile and powerful reports in the system. All individual and unit-level reports related to scout awards and advancement are contained in this area.

- a. Advancement Status Report. This report provides a complete and very concise summary of the advancement status of your unit. For each scout, TroopMaster will print a one-line list of requirements remaining for his next rank. Requirements are heavily abbreviated but you can include a legend at the bottom of the report. Scouts can optionally be grouped by patrol, by rank, or by early/senior ranks. You can even select a specific patrol or rank.

- b. Board of Review Report. This report is designed for scouts who are ready for a Board of Review (Tenderfoot through Eagle Palms) based on today's date or on a future date that you specify. Scouts who still need "Scout Spirit" and/or "Scoutmaster Conference" can also be printed, since those items are often completed on the same night as the Board. The report provides all of the information needed by the board members, including a list of specific requirements completed, advancement remarks, prior rank advancements, and merit badges earned to date. The report also includes a certification block in which to record the results of the board. If the scout is ready for more than one board (e.g., Tenderfoot and 2nd Class), two reports will be printed.
- c. Court of Honor Report/4403. This report provides everything you need to set up your Court of Honor (except the cookies-we're still working on that!). Report options include rank badges, merit badges, special awards, O/A recognition, training, and service stars. In addition to the required "From-To" dates, there are three options related to the use of the "Reported/Presented" flags ([para 6.3](#)) that govern which awards will be included on the report. Included awards can optionally be grouped by recipient or by award type/name.

There are three main sections of this report: the Court of Honor itself, the Awards Summary, and the Unit Advancement Report (4403). Each of these sections can be selectively turned on or off.

- (1) Court of Honor. This section lists your scouts and qualifying awards based on your selection criteria. Following the list of scout awards, TroopMaster includes a list of special awards and service stars earned by your adults.
- (2) Awards Summary. This section provides a "shopping list" of awards you need to support the Court. You can optionally include award item numbers for your council store.
- (3) Unit Advancement Report (4403). This section is a facsimile of the BSA Form 4403. The BSA National Council has authorized local council offices to accept computer-generated substitutes for the Form 4403. If you select the "Print three copies" option, TroopMaster will label them as "Council", "District," and "Unit" copies. Sign the council and district copies and submit them to your council office.

If your council office is on-line with the ScoutNET computer system, select the "ScoutNET" option and, in addition to the paper report, TroopMaster will also create an ASCII delimited file on diskette, which you can then submit to your council. The council will be able to import your advancement data from this diskette directly into ScoutNET. The council will still want a signed copy of the paper report certifying its accuracy.

**The ScoutNET electronic file is in a special format for use with the ScoutNET system. If you open this file manually to view its contents before submitting it to your council office, please do not save the file when you are finished viewing it. Many spreadsheet programs (e.g., Excel) will save the file in a slightly different format even if you have not modified the file. These changes will render the file unusable by ScoutNET.**

If your local council office requires you to report the names of the counselors who taught the badges listed on the Form 4403, check the “Include MB Counselors Certification Worksheet” option. TroopMaster will then generate an addendum report that lists each badge earned along with the name and BSA ID number of the associated counselor.

If you select the “Print labels for MB/rank cards” option, TroopMaster will print stick-on labels for the ranks and merit badges. You can attach these labels to the award cards instead of having to fill them out by hand. Signatures are still required. The default label size is for Avery 5160’s but you can adjust that, if desired. The Avery 6570’s are more appropriately sized for the cards, and that’s one of the options on the “Page Settings” tab of the *File>Preferences* dialog. Since the 6570’s are much smaller, you should also go to the “Report Fonts” tab and reduce your mailing label point size to 8 or 9.

Award Cards - If you select the “Print Award Cards” option, TroopMaster will print award cards on perforated card stock available from Troopmaster Software for the ranks, special awards and merit badges. TroopMaster will include all of the information on the scout and award so that all you will need to do is sign the cards.

Click ‘Award Card Settings’ to align your cards, to select the type of cards to be printed, and to select an image for each card. For instructions on aligning your cards please go to <http://www.troopmaster.com/cards>. Since we can not provide you with specific BSA artwork we have given you the ability to select your own images for each card type. To activate an award card type, check the box for that award and then select an appropriate image file to be used on the card. This can include scanned images that you have saved to your hard drive or any other type of images that you would like to use for that award card. If you already have an image selected for an award but would like to change your image to another image simply click on the image you would like to replace.

**Many images you may find on the web (or other places) are copyrighted material. You should check to make sure that any images you choose to incorporate are either copyright free or you should obtain the necessary rights to use these images.**

To get an end-of-year summary of all the awards earned by your scouts, run this report using a “From-To” period for your whole charter year and check the “Awards summary only” checkbox. If you have archived scouts who left the unit during the year, go into the archive and print another report for the same time period. Add the totals from the two reports to get your grand totals!

If you would like to transfer the award information to a spreadsheet or database management system, check the “Create tab-delimited export file” option. After the report has been generated, TroopMaster will create and save an awards file to a location you specify. The data can then be easily imported from that file into another software package.

**After you have printed or saved the report, TroopMaster will ask if you want to update the “Reported/Presented” flags for all awards included on the report. When you generate the final copy of the report for submission to your council, you should update the R/P flags.**

If you choose to update the 'Reported' flags, TroopMaster will remember the time period used. The next time you display this dialog, TroopMaster will use the "To" date of the previous report (plus one day) as the default "From" date for the next report.

If you check the "O/A recognition" option, TroopMaster will list scouts and adults who completed Ordeal, Brotherhood, or Vigil during the time period of the report. Since these are recognition only, they won't be included on the Awards Summary.

The scout equipment catalog has service stars for years 1-10, 20, 30, 40, 50, 60, and 70, so intermediate years are not included on the Awards Summary. For recognition purposes, they are still included on the main report.

- d. Individual History Report. This is one of the most flexible reports in the system, allowing you to choose exactly what data to include. For example, you can select any or all of the rank badges (including Palms). There are numerous other options, such as including O/A, special awards, training, leadership history, etc. If you want to save paper, select the "Omit details on completed ranks" option and TroopMaster will list only the completion dates for completed ranks. You can generate reports for all scouts, selected scouts, or a single scout. Optionally, you can group the reports by patrol or rank.

TroopMaster automatically monitors changes you make to each scout's advancement records. One of the options allows you to print this report for all scouts whose advancement has changed since their reports were last printed/emailed.

Whenever a scout leaves the unit, select the "Include signature block" option and print two copies. Sign the verification block on both copies. Then, give one copy to the scout to carry with him to his next unit and put the other copy in a permanent history file. If the scout is transferring to another unit that is using TroopMaster 2008 or newer, you can also transfer his data electronically ([para 5.11](#))

- e. Individual Progress Report. This report provides an easy-to-read summary of requirements for the rank toward which the scout is currently working. If Eagle-required merit badges are needed, this report will tell you how many and which ones. If he hasn't completed his "Service Project" requirement, the report shows how many more hours are needed. The "Position of Responsibility" and 2<sup>nd</sup>/1<sup>st</sup> Class "Activities" requirements are handled in a similar manner. The report optionally includes a list of prior rank advancements and an alphabetized list of merit badges earned to date. Advancement remarks and partial merit badges can also be included. Optionally, you can group the reports by patrol or rank.

We recommend that you send out copies of this report at least quarterly so that the scouts and their parents can review them. A complete alphabetized set can be obtained using the "All Scouts" option. These can be mailed home using the mailing labels capability, emailed ([para 12.0](#)), or distributed at Courts of Honor. Letting scouts see their current status also provides an unexpected side benefit. After reviewing their reports, scouts frequently come and tell you of awards or requirements they completed some time ago but forgot to mention!

TroopMaster automatically monitors changes you make to each scout's advancement records. One of the options allows you to print this report for all scouts whose advancement has changed since their reports were last printed.

- f. Merit Badges Earned. This report normally lists all of the merit badges a scout has earned but you can limit the report to a specific time period, if desired. Badges can be sorted alphabetically, chronologically or grouped by rank. If you request more than one scout, you can print each scout on a separate page or print a sequential listing. If desired, you can include the names of the counselors who taught each of the badges.
- g. Merit Badge Matrix. This report lets you select a set of merit badges and produce a spreadsheet-type report that lists your scouts and whether or not they have completed each of the selected badges. The report will also show you if a scout is currently working on any of the badges. A quick selection button lets you highlight all of the Eagle-required merit badges, or you can manually select desired badges.

This report can be very helpful when planning for summer camp.

- h. Partial Merit Badges List. This report lets you review your partial merit badge data in two different ways. The first option groups the badges by scout; i.e., the scout's name is printed followed by the badges on which he is working. The second option lists the merit badges and for each badge, lists the scouts who are working on it. Several other options control the level of detail to include.

If a scout starts a merit badge under one set of requirements and then BSA changes the requirements, the scout can optionally finish the badge under the old requirements. In order to handle that, TroopMaster has a **Modify MB Reqts** button on each scout's *Partial Merit Badges* dialog ([para 6.10](#)). The *Partial Merit Badge Requirements* dialog has a "Year" field in which you can enter the publication year of the associated "Boy Scout Requirements" booklet for each badge. In addition to listing requirements remaining for each badge, this report also shows the publication date of the booklet that the scout is using. If TroopMaster is not sure, it prints a question mark.

- i. Partial Merit Badge Matrix. This report lets you select a specific badge and produce a spreadsheet showing which requirements have been completed by the scouts working on it. If a scout is working on the badge using a different set of requirements than the ones in TroopMaster's system list, he will not be included in the matrix but he will be listed under the matrix along with a list of the requirements he has remaining for the badge.

You can add or update a partial merit badge for a group of scouts all at once through the *Advancement>Group Credit>Merit Badges* option.

- j. Rank Badge Matrix. This is a spreadsheet-type report that lists your scouts and for each scout shows the dates he completed each of his ranks. Optionally, you can include "time-to-rank" averages that show in months/tenths the average time it took for scouts in the matrix to advance to each of the ranks. This report can also be grouped by patrol. Please see [Appendix F](#) for an explanation of how the average times are computed.

- k. Rank Badge Summary. This report lists all of the rank advancements earned during a specified time period, grouped by badge. If you don't enter a time period, all rank advancements are included.
- l. Scouts Having/Needing. This is actually a group of several different reports. In addition to providing lists of scouts having or needing a specified merit badge, special award, or training course, you can also get lists of scouts who have not yet completed their "Service Project" or "Position of Responsibility" requirements.

If you request a list of scouts needing a specific merit badge, special award, or training course, TroopMaster will print all scouts who have not yet earned the specified item. For merit badges, the report will indicate whether or not the badge can be applied to each scout's next rank, and whether or not the scout has started the badge. These reports are very useful in organizing a merit badge or special award class and in planning campouts.

The Scouts Needing Camping MB is a special report. The badge requirements state that a scout needs 20 nights of camping, not including cabin camping. Also, the 20 nights can include no more than one week of summer camp. TroopMaster considers all of these factors in computing "Nights Remaining" for each scout. Therefore, a scout could have over 20 nights total camping but still have nights remaining on this report.

The Scouts Needing World Conservation Award is a special report that shows the status of each scout regarding completion of merit badges required for this award (i.e., Citizenship in the World, Environmental Science, and either Fish & Wildlife or Soil & Water). TroopMaster also provides a *World Conservation Application* report option ([para 12.3s](#)).

The Service Project report lists 1st Class and Star scouts and scouts below 2nd Class who have not completed their service project requirements. This report is useful in planning service projects and can also be given to Life scouts when they begin planning their Eagle projects. Because of the special nature of Eagle projects, Life scouts are not included. If you are tracking service project hours in the activities area of the program, this report will tell you how many hours each scout still needs to complete the requirement.

The Position of Responsibility report provides a list of all 1st Class, Star, and Life scouts who have not yet completed this requirement for their next rank. A "Days Remaining" column shows how much time each scout still needs. An asterisk will be printed next to the name of each scout who is currently serving in a valid position for the requirement.

When you have unit elections, give a copy of this report to the new senior patrol leader so that he can assign these scouts to staff positions.

When you request the "Needing Training" option, you can choose to include scouts whose training is old or expired. To do that, click the "Include scouts who need retraining" checkbox and enter a date in the "Earlier than" field. The report will then include all scouts who have never had the training plus those whose completion dates are earlier than the date specified.

- m. Scouts Not Advancing. This report lists all scouts who have not advanced since the date or time period you specify. Scouts are sorted from the oldest rank advancement to the most recent, providing a prioritized list of scouts who need to be counseled. Eagle scouts are not included. Optionally, you can group the scouts by patrol.
- n. Target Eagle. This option will produce a spreadsheet report on all scouts working on the upper ranks (Star, Life and Eagle). If desired, you can also include scouts below First Class. For each scout, the report shows which requirements have been completed toward the three ranks. The last column of the report shows the number of months remaining before each scout turns 18.

You can create the TroopMaster equivalent of the BSA advancement wall chart by generating this report in landscape format (the default) and including scouts below First Class. Then, generate the Target 1<sup>st</sup> Class report with Tenderfoot, 2<sup>nd</sup> Class, and First Class selected and the “Include scouts who have completed selected requirements” box checked. Lastly, paste the two reports together.

- o. Target First Class. This report provides a spreadsheet-type status of the scouts below 1st Class and where they stand on early rank requirements. Dialog buttons let you quickly select the Citizenship/First Aid, Outdoor Skills, and/or Physical Fitness/Personal Development skill groups. The column header buttons will highlight all of the requirements in their respective columns. You can also manually select requirements with your mouse. Up to 64 requirements can be included on a single report. You can print the requirement definitions and the number of scouts needing each requirement at the bottom of the report. You can also optionally include scouts who have completed all of the selected requirements (see hint above).
- p. Merit Badge Applications/Blue Cards. Use this option to generate the “blue cards” that you must give to scouts when they start work on a merit badge. Highlight the names of the scouts who are starting a badge and then select the badge from the drop-down list. If the counselor who will teach the badge is in your database, select him from the drop-down list; otherwise, select “To be determined”. Lastly, enter the badge starting date and click **Add**. If you make a mistake, highlight the scout and click **Remove**.

You can repeat this process as many times as needed until you’ve selected all of the scouts and badges for which you need applications; i.e., you don’t have to run this option separately for each badge that will be taught. The list box at the bottom of the dialog lists all of the scouts you’ve selected and the badge each scout will start. Scouts who are starting more than one badge can be listed more than once.

While TroopMaster cannot print on the actual BSA “blue cards (Form #34124), you can print the applications on paper or blank card stock, such as Avery 5390’s. If needed, you can adjust margins, card sizes, spacing between cards (gutter spacing), etc.

When all of your scouts/badges are listed, click **OK**. TroopMaster will print one side of the sheets and then stop and wait for you to reinsert the paper or card stock into your printer. You must reinsert the pages in the correct order and using the correct alignment; otherwise, the back sides of your applications will not match the front.

We recommend that you practice generating a few applications on plain paper so that you can learn the proper way to reinsert the pages on your printer.

- q. Eagle Application Assistance. When a scout is ready for his Eagle Board of Review, this report will help him complete the application. It prints all of the available information in the same order as it appears on the application. Your council will expect the scout to submit the official application, not this assistance report.
- r. Palm Application Assistance. This option generates a facsimile of the BSA Palm Application for Eagle scouts who have finished all of the requirements for one of the Palms. Your council may accept this facsimile in lieu of the official application.
- s. World Conservation Application. This option generates a facsimile of the World Conservation Award Application for scouts who have finished all of the requirements for this award. Your council may accept this facsimile in lieu of the official application.
- t. Eagle Honor Roll. This report will produce a list of Scouts who have earned Eagle with your unit. Whenever a scout is promoted to Eagle, you will be asked if you want to add the scout to the Eagle Honor Roll. You can enter Eagle scouts manually using the *Advancement>Eagle Honor Roll* option.

## 12.4 Duty to God

These reports are available only if the “LDS Unit” box is checked on the *Unit General Information* dialog.

- a. Duty to God Certificate. It allows you to get an individual report on any scout for any of the three certificates. If you select the “Default Certificate” option, TroopMaster will generate the appropriate certificate for each of the selected scout(s) based on each scout’s age. Eleven year olds will automatically be excluded.
- b. Duty to God Progress Matrix. This very flexible report lets you see the status of selected scouts against any of the requirements for any certificate. The data is presented in a spreadsheet format. The matrix is limited to 65 columns so you cannot include all seven groups of requirements for any given certificate. However, you can select all of the “Duties and Activities” items, or all of the “Personal Goals”, or a selected combination of the two. You can also include a legend that provides a detailed description of each requirement. We recommend that you use the troop, team, and crew Member Groups when selecting scouts for this report. Doing that allows you to limit a specific matrix report to just the scouts working on that certificate.

## 12.5 Fundraiser

This set of reports provides you with full details on all sales and payments associated with a particular fundraiser.

- a. Individual Sales. This report provides details on all items sold by a selected scout or adult, including the total dollar amounts associated with those sales. It also lists any payments the member has made, and it calculates the balance due, if any. If desired, you can include a signature block for the member to acknowledge receipt of the products.
- b. Payment Summary. For each scout or adult, this spreadsheet-type report shows payments made, total amount due, and outstanding balance, if any. Unit totals are listed at the bottom of the report. Optionally, you can include member phone numbers, email addresses, and payment dates. Scouts can be grouped by patrol.
- c. Sales Matrix. This produces a spreadsheet-style report that shows the quantity sold by each member for each item in the fundraiser. It also calculates total sales by member and by item. The latter figures tell you how many items of each type you will need to fill the orders. If you include scouts and adults, TroopMaster will optionally calculate total unit sales. If you entered wholesale prices for each of the items, TroopMaster will also compute your unit's profit. Scouts can be grouped by patrol.

## 12.6 Labels/Envelopes

TroopMaster lets you print mailing labels and envelopes for your scouts, adult members, POCs, and merit badge counselors. Scout labels are available in six different formats. You can also print custom mailing labels as well as unit return address labels. Optionally, you can include adult leader labels whenever you request scout labels. For scouts, you can also include labels for alternate relatives and/or group the labels by patrol. For scouts and adults, TroopMaster normally uses mailing address if the member has one; if not, it uses street address. However, you can elect to always use street addresses.

TroopMaster also provides a “Custom Fields” option for scouts/adults that lets you print labels with the member’s name plus selected items from the database. Choose the member type (scouts or adults). Then, select the desired data items from the drop-down lists and click **OK**.

You can adjust label alignment via the *Page Settings* tab on the **File>Preferences** dialog.

When printing envelopes, in addition to setting the envelope size within TroopMaster, you must also use your printer *Properties* dialog to set the envelope size and print orientation for your printer itself. There’s a button for this on the TroopMaster *Print* dialog.

When printing scout/adult labels, you can choose to print only one label per household. For this feature to work, you must first create links between related members in your database. For more information on family links, see [Chapter 15](#).

The “Custom Labels” option lets you print labels for special mailings. You specify the name/address to be printed and the number of copies. For example, you could use this feature to print personal return address labels for your Christmas cards!

## 12.7 Merit Badge Counselors

Reports in this group help you manage and more effectively utilize your MB counselors.

- a. Individual Personal Data. This is a single counselor report that includes all of the data on a selected counselor, including the badges he teaches.
- b. Cross Reference. This report consists of two parts. The first is a numbered, alphabetical list of your counselors that includes addresses, phone numbers and/or email addresses. The second is an alphabetical list of merit badges with the corresponding numbers of the counselors who teach them. The two listings together provide a cross-reference for locating counselors for any specific merit badge. This report provides the same information as the “Grouped by Badge” report below, but it uses less paper.
- c. Detailed Listing. This report lists all of the data on each of your counselors, including the badges they teach.
- d. Grouped by Badge. This is the easiest report for locating a counselor for a specific merit badge. Badges are listed alphabetically with the associated counselors’ names under each badge. Optionally, you can include addresses, phone numbers and/or email addresses.
- e. Merit Badges with No Counselor. This lists all of the badges for which you have no counselor. Outdated badges are excluded.
- f. Specific Merit Badge. For this report, you specify a badge and TroopMaster lists all of the counselors who teach it. You can include addresses, phone numbers and/or email addresses.
- g. Training Status. This report lists your counselors along with their phone numbers and completion dates for MBC Orientation Training and Youth Protection Training (YPT). By default, fully trained counselors are excluded but you can elect to include them, if desired. Email addresses are optional.

If desired, you can treat counselors as untrained if their YPT training has expired. To do that, check the “Include counselors who need YPT retraining” box and enter an “earlier than” date. For counselors who completed YPT earlier than that date, TroopMaster will treat their training as expired, and their training completion dates on the report will be flagged with pound signs (#).

## 12.8 Mic-O-Say

Mic-O- Say is a program similar to Order of the Arrow for scouts in the Midwest. Please see [Chapter 10](#) for more information.

- a. Adult Individual Member. This report includes all of the data from the Mic-O-Say member dialog for the selected adult.
- b. Scout Individual Member. This report includes all of the data from the Mic-O-Say member dialog for the selected scout.

- c. Mic-O-Say Membership. This report lists all of the Mic-O-Say members in your unit. It includes dates for Foxman, Brave, Warrior, and Honored Woman, as well as Mic-O-Say leadership levels and remarks. Optionally, you can include Foxmen who have not attained Warrior status. Other options allow you to include scout and/or adult dates of birth and to list members by Mic-O-Say group.

## 12.9 Order of the Arrow

This group includes all of your O/A reports.

- a. Adult Individual Member. This report includes all of the data from the O/A member dialog for the selected adult.
- b. Scout Individual Member. This report includes all of the data from the O/A member dialog for the selected scout.
- c. O/A Eligibility. This report lists all of your scouts and adult leaders who are not O/A members. You can optionally include only members who are currently eligible (i.e., meet all O/A eligibility criteria), or you can include all non-O/A members and view each member's current status toward eligibility.

To be eligible, scouts and adults under 21 must have earned at least the 1<sup>st</sup> Class badge. All scouts and adults must have experienced 15 nights camping during the two-year period prior to the election. The 15 nights must include one, but no more than one, long-term (five or six nights) camp. In accordance with the O/A Guide for Officers and Advisers, the balance of the 15 nights must consist of overnight, weekend, or other short-term camping. Camping nights from the *Set Prior Totals* area are not counted since TroopMaster has no dates associated with them. Optionally, cabin camping can be counted toward eligibility—there's a checkbox that allows you to do that. By default, TroopMaster counts camps lasting five nights or longer as “Long term” but if you want backpacking to be counted as “short-term” regardless of length, check that box.

If desired, you can generate the *Unit O/A Election* report as an addendum. Use this to record the results of the vote, and submit the signed report to your O/A Lodge.

- d. O/A Membership. This report lists all of the O/A members in your unit. It includes dates for O/A Election, Ordeal, Brotherhood, and Vigil, as well as O/A leadership positions and remarks. As an option, you can list all recently elected scouts and adults who have not yet completed their Ordeal. Other options allow you to include scout and/or adult dates of birth and email addresses.

## 12.10 Points of Contact

There are two reports available.

- a. Individual Personal Data. This report includes all of the data from the POC dialog for the selected individual.

- b. POC List. The standard report lists all of your POCs sorted by name or position and optionally grouped by category. However, if you select “Filtered Selection” from the “Include” pull-down list, this can be one of the most flexible reports in the system.

Through the filtered selection options ([para 2.12](#)), you can list information on your POCs alphabetically, grouped by category, or for a specific category. POCs can be sorted by name or position. You can even search for specific skills or interests and have TroopMaster look for a match on any or all of your entries. If desired, POC remarks can be included.

## 12.11 Scout/Unit General

This group includes a wide variety of rosters, phone lists, and general information reports.

- a. Individual Personal Data. This report lists all of the personal data on a selected scout. A blank report is available for data collection (see *Reports>Forms*).
- b. Scout Leadership History. This report allows you to produce a list of all of the leadership positions in which each scout has served, including his current position(s). This is useful at election time to see which positions each scout has not yet experienced.
- c. Scout Leadership Roster. This report lists all of your scouts who currently hold a leadership position. It groups the scouts into three sections on the report. The first section contains the main unit leaders (i.e., SPL, ASPL). The second section lists all of the Patrol Leaders and Asst Patrol Leaders. The last group contains all other scouts who have a position of responsibility. You can optionally include a list of vacant leadership positions.
- d. Scout Training List. For each scout, this report lists all of the training courses completed and the associated completion dates. It also lists email addresses and home phone numbers.
- e. User Defined Fields/Remarks. This option provides a powerful way of producing special reports on your scouts. TroopMaster lets you select any or all of the user-defined fields from the scout personal data dialog. The report then lists each of your scouts and the selected data items.

Use this option to produce reports that are not otherwise available in TroopMaster. For example, you could define fields #1 and #2 for hobbies and special interests and then print a “Hobbies and Special Interests” report.

- f. Birthday List. This report groups your scouts and adult leaders by birth month and shows the age each scout will be on his next birthday. Adults’ ages and years of birth are not listed (you’re welcome!).
- g. Council Recharter/Annual Recharter. If your council office is on-line with BSA’s ScoutNET computer system, this option allows you to generate your annual recharter report and write that report to an ASCII delimited file on diskette, which you can then

submit to your council office. The council will be able to import your data from this diskette directly into ScoutNET. TroopMaster will also print an associated paper report with signature blocks for you to certify the accuracy of your submission. Both the diskette and paper report must be submitted.

Most of the data used to generate the report is obtained from the *Unit General Information* dialog and the scout/adult personal data dialogs. You will enter the rest of the necessary information using two other dialogs:

- (1) Recharter Information. This is the basic information needed to generate the report. It includes the old charter expiration date (obtained from the *Unit General Information* dialog) and the new expiration date, as well as your meeting day, frequency, and time. Some units have an official number that is different from the one they commonly use, so you can change the number here, if necessary. The unit term is usually 12 months, unless the unit is new or the council is restructuring their recharter alignment. The "Pricing" figures list the costs that were in effect when this version of TroopMaster was released. These can be adjusted as changes occur. This dialog includes checkboxes for Leader Trained, Quality Unit, 100% Boys Life, and Bulk Mailing. If your council prefers to have mailing addresses on the paper report, you can optionally select that. Both street addresses and mailing addresses are always included in the electronic transfer file.

Some councils require an additional \$1.00 for insurance. However, insurance is not part of ScoutNET, so you must handle that through your local council separately

When you have completed your entries on this dialog, click **Next** to proceed.

- (2) Recharter Selection. This dialog is used to select the scouts and adults who will be chartered and to indicate each member's charter status. For example, highlight the names of the scouts you plan to register and click the **Paid** button. Other charter status buttons allow you to mark members as **Transfer**, **Multiple**, or **Non-registering**. Please consult your BSA unit renewal instructions for specific guidance on each of these status codes. To clear an entry for a specific member, highlight the name and click **Clear Charter Code**. Radio buttons allow you to switch the selection list between scouts and adult leaders.

Only adults who have been assigned at least one leadership position are included on the selection list. If an adult is assigned to multiple leadership positions, he will appear in the list more than once unless the positions have the same two-character BSA position code. This allows you to choose the position(s), if any, in which the adult will be chartered.

BSA recharter rules require that you charter adult leaders in certain key positions based on the type of unit being chartered, but you rarely have to charter all of the adults in your unit. Please read [Appendix E](#). If you have questions, consult your Unit Commissioner.

One of the key adult leader positions is "Executive Officer" and you must select this person for rechartering. This position used to be called "Institutional Head" (hence the position code of "IH"). The Executive Officer does not have to pay. He is always chartered as a "Multiple".

Please do not use the “Non-registering” status code for adults who are not being registered. Usually, you should just skip over adults whom you don’t plan to register (i.e., leave their charter status blank). “Non-registering” is for rare cases where you have an adult whom you’re not going to register, but for whom you want to send data anyway. Boy’s Life status can be adjusted on the fly by highlighting the scout or adult and clicking the column header button. The default setting is taken from the “Boy’s Life” checkbox on each scout/adult personal data dialog. However, your recharter selections are always saved for 60 days so if you start your recharter and later update the “Boys Life” checkbox on a scout/adult personal data dialog, the setting on the recharter selection list will not change.

When you are finished, click **OK** on the *Recharter Selection* dialog to generate the report. TroopMaster will automatically review all of your data to ensure that your unit meets BSA recharter standards. If any discrepancies are encountered, an error message will pop-up before the report is displayed. The report cover sheet includes a specific list of errors encountered. This makes it easy to see problems you need to correct in order to meet BSA standards.

If you checked the "LDS Unit" checkbox on the *Unit General Information* dialog, TroopMaster will apply LDS rechartering rules when it validates your recharter report. For example, under LDS rules, Boy Scouts must be age 11-13, Varsity Scouts must be 14-15, and Crew Members must be 16-20. This usually means that you must create a separate recharter report for each group, making sure that you select the appropriate set of adults/scouts for each report. For example, when you charter the crew you must include a Venture Crew Advisor. If you charter the same adult on more than one report, he should be marked as "Paid" on one and "Multiple" on the others. You can use the “Display” drop-down options to limit the selection list to your troop, team, or crew Member Group.

When you are satisfied with the results, print the paper report and then click **Close**. TroopMaster will then save the recharter transfer file to a diskette to give to your council. Remember to sign the printed report and submit that with the diskette.

There are two fields that appear on the paper report that cannot be set from within the program: “Unit Status” and “On Time Unit”. These fields are not part of the ScoutNET data transfer file that is written to diskette, and you should leave them blank on the paper report. Your district leader will make these entries.

The official ScoutNET printed report does not contain all of the data contained in the electronic transfer file. If you would like to see a printed copy of other data being transmitted, check the “Print copy of transmittal file” checkbox, and TroopMaster will produce a separate unit report. Please do not submit this internal report to your council

To help you through your annual recharter period, recharter selections you make are retained for 60 days after your last change to the selections. Your selections are discarded after 60 days or when you run the *Additional Enrollment* report.

- h. Council Recharter/Additional Enrollment. Use this report to submit data to your council on new scouts and adults who join your unit mid-year. This option will create an ASCII delimited file similar to the *Annual Recharter* report. Your council will be able to import the data from this diskette directly into ScoutNET. TroopMaster will also print an associated paper report for you to verify the accuracy of your submission. Both the diskette and paper report must be submitted. If your council prefers to have mailing addresses on the paper report, you can optionally select that. Both street addresses and mailing addresses are always included in the electronic transfer file.
- i. Email List. This report produces a list of email addresses for your scouts, parents and adults. If you include scouts, you can optionally also include email addresses for parents and/or alternate relatives.
- j. General Purpose Worksheet. This extremely flexible worksheet can be used for a multitude of purposes. For example you could use it as a data collection worksheet by giving it a title and defining one or more column headers. Optionally, you can choose to include selected items from the scouts data file, such as date of birth or current leadership position. You can specify 5-column or 10-column options, but if you need a large text column, one of the options on the database drop-down list is "Use rest of line". If you select that option, that column will extend to the edge of the report. If you include scouts on the report, you can group them by patrol or rank.

If you think you might use the same worksheet again, click the **Save** button and assign it a file name. Then, the next time you need the worksheet, just select it from the drop-down list. If there's a saved worksheet that you no longer need, select it from the list and click **Delete**.

- k. General Purpose Matrix. This option produces a spreadsheet-type report similar to the General Purpose Worksheet. You can define up to 65 column headers for this report, which makes it very useful for making a checklist of items for your scouts and/or adults. Just assign the report a title and then define as many column headers as you like. For each column, enter the header text and click **Add**. If you need to adjust the sequence, highlight the header that you need to relocate and click **Move Up** or **Move Down**. If you also want to have columns with no predefined header, set the "Number of columns" field to the total number of columns desired. Scouts if included can be grouped by patrol or rank.

If you think you might use the same matrix again, click the **Save** button and assign it a file name. Then, the next time you need the matrix, just select it from the drop-down list. If there's a saved matrix that you no longer need, select it from the list and click **Delete**.

- l. Medical/Special Needs. This report lists your scouts and/or adults and any medical and/or special needs data that you entered for them on the "Personal #2" tab of their personal data dialogs. Medical information includes doctor's name and phone number, emergency contact, health insurance, dates/classes of physical exams, etc. You can also include information on medications, allergies, etc. The "Special Needs" option relates to

conditions such as learning disabilities, visual/hearing impairments, emotional difficulties, etc.

- m. Photo Directory. If you have scanned and entered photos for your members, this option will produce a photo directory on your scouts and/or adults. This can be especially useful to help new leaders familiarize themselves with your scouts. You can choose to include phone numbers, patrol assignments and/or leadership positions. You can also group your scouts by patrol.

We recommend that you take a *Photo Directory* with you on campouts so that if someone gets lost, you can show the search team his picture. Using the *Group Members* option ([para 4.4](#)), you can limit the directory to just those scouts and adults who are attending.

- n. Physical Exam Status. This report lists your scouts and/or adults along with dates for all three classes of physical examinations. Physicals that have expired (based on a date you specify) will be flagged with an asterisk. Remember that Class 2 physicals are not applicable to adults over age 40. They must complete a Class 3 physical.

Enter a future date to see who will need physicals for a planned activity, such as summer camp.

- o. Service Years. This report shows the service year status of your scouts/adults. For scouts and adults, TroopMaster computes service based on the “Joined Unit” date or “Became Leader” date, respectively, adjusted by “Prior Service” and leadership history entries.
- p. Swimming Levels. This report is useful whenever you schedule an activity that involves swimming. The report lists your scouts and for each shows age, rank, patrol, and swimming level (non-swimmer, beginner, or swimmer). Swimming levels are assigned via the *Scouts>Swimming Levels* menu option. Optionally, you can include a column on the report where you can assign a “buddy” to each scout or enter recertification levels and dates. Scouts can be grouped by patrol or swimming level.

BSA requires swimming levels to be recertified each year so we recommend that at the beginning of the year, you reset all scouts to “non-swimmer” status. Then, use this report with the “Recertified” option to record the results and date of each scout’s recertification. The report then becomes a data collection tool for updating the swimming levels in your database.

- q. Unit General Information. This report contains all of the information from the *Unit General Information* dialog ([para 4.1](#)).
- r. Unit/Patrol Awards. This report produces a list of all awards earned by your unit and/or individual patrols.
- s. Unit Phone List. This report lists your scouts and their home or mailing addresses, phone numbers, and email addresses; parents' names, phone numbers, and email addresses; and, optionally, alternate parents' names, phone numbers, and email addresses. You can also include adult leaders on this report.

- t. Unit Roster. This extremely flexible roster provides a list of your scouts with ranks, patrol names, and leadership positions. You can print the roster alphabetically, sorted by birthday, grouped by patrol, or grouped by rank. You can optionally include the scouts' addresses and parents' names, dates of birth, email addresses, and all phone numbers (home phone is always included).

If you group the report by patrol, you can choose to include patrol advisors and/or print the patrol leaders and assistants first.

- u. Unit Vehicles. This report lists the vehicle information (e.g., make/model, insurance, etc.) on the vehicles entered on the scout and/or adult personal data dialogs.

If you've defined a Member Group for scouts and adults who plan to attend a specific activity, you can select that group through the "Filtered Selection" option and thereby limit the report to just those members.

## 12.12 Varsity

These reports let you track your Varsity awards at the unit and individual team member levels.

- a. Individual History. This option will generate individual reports for selected team members showing requirement completion dates for both the Varsity Letter and the Denali Award. If desired, the reports can be grouped by squad.
- b. Award Matrix. This option generates a spreadsheet-type report that lists your team members and shows which award requirements each member has completed. You can run the report for either the Varsity Letter or the Denali Award. Optionally, you can group the report by squad and/or include a requirements legend at the bottom.

## 12.13 Venturing

These reports let you track your Venturing awards at the unit and individual scout levels.

- a. Individual History. This option will generate individual reports for selected crew members showing requirement completion dates for selected Venturing award(s). Options include each of the bronze awards plus the Quest, Gold, and Silver awards. If you check the "Only include bronze awards for which some requirements are complete" box, TroopMaster will only include bronze awards toward which a specific crew member is working. The "Always include primary bronze" box ensures that each scout's primary bronze award ([para 6.13](#)) is included on the report regardless of the other options selected.
- b. Award Matrix. This option generates a spreadsheet-type report that lists your crew members and shows which award requirements each member has completed. You can

run the report for Gold/Silver Awards, the Quest Award, or any of the bronze awards. A requirements legend can be included at the bottom of the report.

- c. Outdoor/Ranger Details. Since both the Bronze Outdoor and Ranger awards have sub-requirements, this report is provided so that you can see more details on these awards than is available on the individual history report. Under each basic requirement, this report provides a list of sub-requirements that have not yet been completed.
- d. Quest Award Details. Since the Quest award has sub-requirements, this report is provided so that you can see more details than are available on the individual history report. Under each basic requirement, this report provides a list of sub-requirements that have not yet been completed.
- e. Gold Award Details. This report provides more detail than is available on the individual history report. Under each basic requirement, this report provides a list of sub-requirements that have not yet been completed.

## 12.14 Sea Scouts

These reports let you track your Sea Scout awards at the unit and member levels.

- a. Individual History. This option will generate individual reports for selected ship members showing requirement completion dates for the Apprentice, Ordinary, Able, and Quartermaster awards.
- b. Award Matrix. This option generates a spreadsheet-type report that lists your ship members and shows which award requirements each member has completed. You can run the report for Apprentice, Ordinary, Able, or Quartermaster. Optionally, you can include a requirements legend at the bottom.

## 12.15 Custom

This option allows you to create custom reports on your scouts and adults by choosing specific data fields to include on the report. For example, you may wish to generate a one-line-per-scout phone list, including each scout's name, home phone, cell phone, and email address. Or you can turn it into a two or three-line report and add items like current rank, date of rank, and leadership position. In addition to selecting which data fields to include, you can enter a report title.

If you think you might use the same report again, click the **Save** button and assign it a file name. Then, the next time you need the report, just select it from the drop-down list. If there's a saved report that you no longer need, select it from the list and click **Delete**.

## 12.16 Forms

These forms are primarily to help with data collection but this area also includes permission slips.

- a. Data Collection Forms. To help you gather the data TroopMaster needs on your scouts, adults, merit badge counselors, and POCs, there are separate personal data collection forms on each group as well as an advancement (Individual History) form for your scouts.
- b. Permission Forms. This option makes it easy to print personalized permission slips for unit outings. We have developed a default permission form with verbiage that we believe will be useful to many units. However, you can change the wording for the body of the default form to meet the legal requirements in your area and the specific needs of your unit. You can also create and save multiple permission form “masters” for different types of activities. Each scout’s medical information can be included so that it’s available on the activity and so that its accuracy can be reviewed by the parents.

Once you have reviewed/modified the body text for the form, select the scouts for whom you want to generate permission slips. You can select specific scouts, all scouts, or use the filtered selection option to select desired scouts. Whenever you generate permission slips, TroopMaster will print one slip per scout with each scout’s name on the form.

**Troopmaster Software, Inc. makes no guarantee that the wording we have provided is legally acceptable in your area, nor do we guarantee that it adequately protects your unit against liability lawsuits. It is your responsibility to adjust the wording as necessary to meet your needs and the legal requirements in your area. We strongly recommend consulting an attorney and your council office to ensure that the final wording you choose satisfies your legal needs.**

If you access this dialog through the **Permission Form** button on the *Activity* dialog, TroopMaster will preload the activity type, location, and departure/return times for you.

If you create a Member Group ([para 4.4](#)) of scheduled attendees, you can select that group via the “filtered selection” option to highlight the names of the scouts for whom to print the permission slips. You can also use that group after the event to mark attendance.

Previous versions of TroopMaster provided an option to print two permission forms on the same page if the verbiage was sufficiently concise. That is no longer possible. Not only have new data items been added but the permission forms can now be emailed to your scouts.

## 12.17 Other

This is a group of miscellaneous lists and worksheets. In addition to a Merit Badge Book Inventory Worksheet, you can print lists of system-defined and user-defined menu items such as merit badge numbers, POC categories, special award names, training courses and leadership positions, and member groups.

# CHAPTER 13. ARCHIVING

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## 13.0 Overview

TroopMaster provides an archive for scouts and adults who leave your unit. The archive data is stored separately from your active unit data, but a scout or adult can be retrieved from an archive if he later returns to your unit.

## 13.1 Creating an Archive

An archive is initially created for you as a subfolder under the main program data folder (e.g., C:\Troopmaster Software\TroopMaster\Data\Archive1). Up to 250 scouts and 500 adults can be stored in a single archive. If the initial archive fills up, create another via the *File>Create New Archive* option.

You cannot change the names or locations of your archive folders.

## 13.2 Archiving Scouts/Adults

Scouts (adults) can be archived either from their individual personal data dialogs or from the *Scout (Adult) Management* dialogs. Click **Del/Archive**, check the “Archive” option on the pop-up window, and enter the date he left your unit. If you click **OK**, TroopMaster will archive the selected member and then delete him from your active unit files. If you’re archiving a scout who is at least 17 years old, TroopMaster gives you the option of also copying his pertinent data to your active adults file.

Archiving a member saves his personal data, special awards, training, leadership history, Order of the Arrow/Mic-O-Say information, and attendance. The member’s current leadership position(s), if any, will be closed out and moved to his leadership history file. In addition, the member’s “Joined Unit” date will be erased and his service with your unit will be added to his “Prior Service” area. If the member is a scout, all advancement data is also archived. Any data related to the member’s fundraiser sales is discarded.

Archiving a scout or an adult saves a small file that can be used to restore the member’s attendance if he is later retrieved from the archive back into the active unit. The associated activities themselves are not archived, and activities/attendance cannot be reviewed or printed from the archive.

## 13.3 Reviewing Your Archive

To review your archive or print reports on archived scouts and adults, select the *File>Open Archive Files* option. TroopMaster remembers which archive was last accessed and will present that as the default. To remind you that you are in the archive, the words “Archive Files” will be displayed on the title bar. While in the archive, some options (e.g., activities, POCs, etc) are not available. However, you can add or review archived scouts/adults, edit data entries, print reports, etc.

Scouts/adults who left your unit before you purchased TroopMaster can be added directly to the archive via the “Add New” member options.

## 13.4 Retrieving Members From the Archive

If you need to retrieve an archived scout or adult back into your active unit files, go to the *Scouts* or *Adult Members* menu and select *Retrieve from Archive*. Select the name of the member you want to retrieve from the pop-up list and click **Retrieve**.

# CHAPTER 14. MAKING BACKUPS

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## 14.0 Overview

It is hard to overstate the importance of making backups. Maintaining your active database and archive requires a lot of work. Protect that work by following the procedures in this Chapter carefully.

TroopMaster uses file compression technology for backups. Your active database and archive will be compressed into much smaller backup files. Don't be alarmed at the speed of the backup and the small sizes of the backup files. You will not be able to read or open these files with any of your other software programs, nor will you be able to decompress them with any other program. These files can only be decompressed through the *File >Restore Database* menu option by someone who has a valid Data Access Password. If the backup was made using a Data Encryption Password, the leader doing the "restore" must also have that.

## 14.1 Backing Up Your Unit Database

Your unit database represents a major investment of your time. It is extremely important that you make frequent backups of this data. Don't let a hard drive failure force you to reenter most or all of your data from scratch. We recommend making a backup after each data entry session (don't wait until you get your whole unit entered before you make your first backup!). In addition, don't always use the same backup diskette or folder. If your hard drive becomes corrupted, it is possible to damage your primary database and the backup before you recognize the problem.

Because of this, we recommend that you maintain at least three different backups. Alternate between these backup diskettes or folders each time you backup your database. By alternating, you greatly increase your chances of being able to recover from a damaged file.

Whenever you exit the program, TroopMaster will give you the option of automatically backing up your database. You can also request a backup through the *File>Backup Database* option. Unless your backup includes scout/adult photos, all of the backup files will fit onto a single diskette.

The backup function always backs up both your active data and your archive(s).

**Photo files are large and they do not compress significantly. Therefore, if you select the "Include photos" option on a backup, the backup files probably won't fit on a single diskette. If not, you'll need to backup to a larger medium, such as a zip cartridge, a CD, or another hard drive folder.**

## 14.2 Other Considerations

TroopMaster comes with a site license for your entire unit so you are free to give copies to other leaders with your same unit. Regardless of whether or not other leaders will use this data, we recommend that you periodically give data backups to at least one other leader. By doing that, you will be able to recover even if you lose everything to a fire or flood. Also remember that database backups can be emailed through the *File>Email Database* menu option. In order to be able to restore the data, the other leader will also need a valid Data Access Password ([para 3.15](#)) and, if you've defined one, the Data Encryption Password ([para 3.15b](#)).

If your unit has the TroopMaster DotNet ([para 3.16](#)) add-on, you automatically have multiple copies of the database at multiple locations.

# CHAPTER 15. FAMILY LINKS

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## 15.0 Overview

Links provide a powerful way to tie related data records together for concurrent update of common data fields. You can link siblings together plus you can link parents to adult members, merit badge counselors, or POCs. You can also create links between adult members, merit badge counselors, and/or POCs, independent of the parent links. Once these database records have been linked, all common information between the records will be updated each time any of the linked records is updated.

For example, if a parent is also an adult member and a merit badge counselor, linking the three records together will not only reduce initial data entry but also make it easier to maintain these records.

You cannot link an adult leader directly to another adult leader, although TroopMaster will indirectly link them if they are parents of one of the scouts, and links are established between the adults and the parent records. For example, if John and Jane Jones are both adult leaders but they do not have a scout in the unit, there is no way to link their adult records. The same is true of MBCs and POCs, although, as described below, you can directly link an adult leader to an MBC and/ or POC record.

## 15.1 Linking Siblings

If the brother of an existing scout joins the unit, go to the *Add New Scout* dialog and enter the last name of the second brother. If the last name matches an existing last name of a scout in the system, TroopMaster will automatically offer to create a family link. Otherwise, click the **Link Sibling** button to display a list of scouts. In either case, select the brother from the pop-up list. TroopMaster will then create a link between the two records and copy the common household information from the existing brother's record to the dialog being displayed.

Common data fields for brothers include home phone, addresses, parent information, and alternate relative information. Existing sibling links are displayed in the "Siblings" drop-down list box on the "Personal #1" tab of this dialog.

## 15.2 Linking Parents and Adults

You can link parents and adult records together from either the adult personal data dialog or from the "Parents" tab on the scout personal data dialog. You can create a link from the "Parents" tab whether or not the adult member record already exists. Click the "Link to" box and from the pop-up dialog, select an existing adult member or click **Create New** to create a new adult record.

If you create the link from the adult personal data dialog, you can only link to an existing parent. If the adult does not exist in the “parents” area, enter the scout/parent data first and then create a new adult member record from the “Parents” tab.

If you have linked an adult and a parent record within the system, you may also optionally choose to link the vehicle information between the two records.

**If you create a new link to an existing record, TroopMaster will always update the currently displayed dialog with data from the selected record. For example, if a person has been entered in both the “parents” area and the “adults” area, going to the “Parents” tab on the scout personal data dialog and creating a link to the adult member will copy the data from the adult’s record to the scout personal data dialog. If the parent’s data is more current than the data in the adult record, you should go to the adult personal data dialog to create the link.**

### 15.3 Linking Parents and MBCs

Linking parents with merit badge counselors is accomplished in the same manner as for parents and adult members.

### 15.4 Linking Parents and POCs

Linking parents with POCs is accomplished in the same manner as for parents and adult members.

### 15.5 Linking Adults and MBCs

You can link adults and merit badge counselors together from either the adult personal data dialog or the merit badge counselor dialog. From either area, you can choose to create a new record in the other file or you can link to an existing record.

### 15.6 Linking Adults and POCs

You can link adults and POCs together from either the adult personal data dialog or the POCs dialog. From either area, you can choose to create a new record in the other file or you can link to an existing record.

### 15.7 Linking MBCs and POCs

You can link merit badge counselors and points of contact together from either the MBCs dialog or the POCs dialog. From either area, you can choose to create a new record in the other file or you can link to an existing record.

### 15.8 Quick Access Buttons

Quick access buttons give you a way to move quickly to a linked record once a link has been established. This allows you to review information on the associated parent, adult, merit

badge counselor, or POC from any of the other areas. Just click the button next to the link checkbox.

## 15.9 Breaking a Link

To break any family link, uncheck the box next to the unneeded link. Links are automatically broken if you delete one of the members.

Deleting one of the linked records breaks the link but it does not automatically delete the other record. For example, if you delete a scout whose parent is linked to an adult member record, the adult record will still exist.

If an existing member is currently linked to more than one other area and you wish to break the links to that member, you should go to that member's personal data area and break all existing links for that member. If any links are still active, TroopMaster will automatically regenerate the link that you have just broken because the remaining links still point to the same record(s).

# APPENDIX A. SYSTEM LIMITATIONS

---

TroopMaster will not let you exceed the following limits:

## General

- 24 patrols
- 50 user-defined adult leadership positions
- 300 adult training course definitions
- 20 POC categories
- 100 POC skills/interests definitions
- 100 unit awards
- 100 awards per patrol
- 50 fundraisers
- 24 sales items per fundraiser

## Adults

- 500 adult members
- 15 leadership history positions per adult
- 100 special awards per adult
- 100 training courses per adult
- 500 merit badge counselors
- 500 points of contact (POCs)
- 20 skills/interests per POC

## Scouts

- 250 scouts
- 100 special awards per scout
- 100 training classes per scout
- 300 scout training course definitions
- 136 merit badges per scout
- 15 partial merit badges per scout
- 15 leadership history positions per scout

## Activities

- 24 unit activity types
- 30 unit activity levels
- 2000 total activities

## Other

- 20 email message attachments
- 100 vehicles per tour permit

## APPENDIX B. AUTOMATIC MONITORING & CREDITING OF ADVANCEMENT REQUIREMENTS

TroopMaster monitors several of the advancement requirements and will automatically enter a completion date in the scout's advancement records for you when the requirement has been completed.

- (1) 2<sup>nd</sup>/1<sup>st</sup> Class Activities Requirements. For 2<sup>nd</sup> Class, a scout must attend five activities (not including troop/patrol meetings) of which at least two must be overnight campouts. For 1<sup>st</sup> Class, the required number is 10 activities, of which at least three must be campouts. TroopMaster will monitor scout attendance at activities and automatically credit both of these requirements when they are complete. The *Individual Progress* report shows the number of activities still needed by each applicable scout.
- (2) Participation Requirements. The Star, Life, Eagle, and Eagle Palm "Participation" requirements are based on the date a scout earned the previous rank, the number of months the scout must serve in that rank, and "Today's Date." When TroopMaster sees that the scout has served the minimum time, it will automatically enter a completion date in the scout's advancement records. The projected completion date is shown on the scout's *Individual Progress* report.

If desired, you can turn off automatic credit of this requirement by checking the "Inactive" checkbox on a scout's *Individual Advancement* dialog.

- (3) Position of Responsibility Requirements. Automatic crediting of the "Position of Responsibility" requirements works the same way as "Participation" except that there are additional restrictions. First, the scout must be serving in a valid position for the next rank (see your Scout Handbook for a list of valid positions for each rank-the positions vary). Secondly, he must serve in this position while holding the previous rank. For example, if the scout is working toward Life, the Scout Handbook states "While a Star scout, serve actively for six months...". Therefore, TroopMaster will key the completion date off of the date the scout assumed the position of responsibility or the date he became a Star scout, whichever is later.

**In tracking this requirement, TroopMaster considers the scout's current position #1 plus any creditable positions in the scout's leadership history area. A position is counted toward the requirement if the "Credit" checkbox is checked. The *Individual Progress* report shows the number of days remaining for applicable scouts.**

**If you accidentally assign a scout to the wrong leadership position or use the wrong effective date, be careful when you correct the error. If you modify the position or date and enter a newer position date, the previous entry will be moved to the scout's leadership history. If that happens, highlight the erroneous position on the history list and click Remove. Otherwise, the erroneous entry could be used toward automatic credit of the requirement.**

(4) Service Project Requirements. The 2<sup>nd</sup> Class rank has a one-hour service project requirement and the Star/Life ranks each require six hours. TroopMaster will monitor scout attendance at service projects and automatically credit these requirements when they are complete. As with the “Position of Responsibility” requirement, the six hours of service needed for Star/Life must be completed since the date the scout earned the previous rank. The *Individual Progress* report shows the number of hours still needed by each applicable scout.

When crediting activity attendance, TroopMaster will let you credit individual scouts with differing numbers of hours served. Just use the appropriate number (hours and tenths) as each scout’s attendance marker ([para 7.1b\(2\)](#)).

TroopMaster never erases or replaces an existing date for the above requirements. Therefore, if you remove credit for a leadership position or for service project hours and the corresponding requirement has already been credited, you must manually erase the requirement completion date.

# APPENDIX C. PROCESSING OF EAGLE-REQUIRED MERIT BADGES

---

TroopMaster monitors entry of Eagle-required merit badges to help ensure that the minimum number has been earned before a scout can be credited with Star, Life, or Eagle. In doing this, TroopMaster complies with BSA rules as defined in the Boy Scout Requirements Booklet and the Boy Scout Handbook. If there are any uncertainties, we contact the BSA National Council to ensure that our interpretation of the rules is correct. Applying these rules, TroopMaster automatically places completed merit badges under the appropriate ranks for you.

**If you would prefer not to use the automatic badge placement feature, check the “Manual MB Placement” checkbox for the scout and you can then place each merit badge under any rank desired. On each rank dialog, TroopMaster will let you know how many of the remaining badges must be Eagle-required and it will prevent you from placing too many non-Eagle badges on a rank. However, the program will not stop you from entering a merit badge under the “wrong” rank. For example, even if a scout still needs Eagle-required badges for Star, TroopMaster will not stop you from entering an Eagle-required badge under Life. In selecting manual mode, you are assuming most of the burden for ensuring that the scout advances according to BSA rules.**

If “Manual MB placement” has not been selected, a merit badge you credit via group advancement or the individual rank dialogs will be placed in exactly the same manner as if you had entered the badge on the *Merit Badges-Completed* dialog.

If you have one or more disabled scouts who are not required to earn the standard Eagle-required badges, please see [Appendix D](#).

There is one other area that even many long-term Scouters do not fully understand because the rules are different for the Eagle rank than they are for Star and Life:

- (1) The Star rank requires four merit badges from the Eagle-required list and the Life rank requires three. The required list has 15 merit badges in 12 categories. Any of these 15 merit badges may be counted as Eagle-required for Star and Life. (This rule is in the Boy Scout Handbook)
- (2) The Eagle rank requires a total of 21 merit badges, including one from each of the 12 Eagle-required categories.

Therefore, if a scout earns the Emergency Preparedness and Lifesaving merit badges, both can be counted as Eagle-required merit badges for Star/Life even though both badges are from the same category. However, the scout must still earn a badge from each of the other 11 Eagle-required categories in order to earn the Eagle rank.

BSA has periodically revised the Eagle-required merit badge list, and the most recent changes became mandatory on April 1, 1999. All Boy Scouts are now advancing under this set of rules but most units have archived scouts who completed their ranks under a previous set of rules, and a few units still have active scouts who did so. In some cases, a scout may even have completed Star and/or Life under one set of rules and then Eagle under another. In order to accurately deal with all of this, the merit badge placement function in TroopMaster handles the last three sets of Eagle-required badge lists. This allows you, for example, to enter previous members of your troop directly into the archive and have TroopMaster accept your entries. The remainder of this Appendix explains the methodology we use in the automatic badge placement function.

There are currently 15 Eagle-required merit badges divided into 12 categories, but the numbers of badges/categories and the content of the categories have changed over the past few years. The following categories have been valid for many years and are still valid under the 1999 rules: (a) Camping, (b) Citizenship in the Community, (c) Citizenship in the Nation, (d) Citizenship in the World, (e) Communications, (f) Emergency Preparedness or Lifesaving, (g) Environmental Science, (h) First Aid, and (i) Personal Management. The remaining categories vary according to time period:

- 1) Prior to Sept 1994, there were two other categories:

- Safety
- Personal Fitness or Sports or Swimming.

- 2) From Sept 1994 until Mar of 1999, there were three other categories:

- Safety
- Personal Fitness or Sports or Swimming
- Family Life.

- 3) As of Jan 1999, these last three categories changed:

- Personal Fitness
- Cycling or Hiking or Swimming
- Family Life

As you can see, badge lists #2 and #3 overlap between January and March of 1999. This means that during the three-month transition period to the new rules, a scout could have legally completed a rank using either badge list.

If a scout completed all of the rank requirements except his Board of Review by March 31, 1999, he could have gotten his Board of Review later and still used the pre-1999 rules. However, if any other rank requirement was still open on April 1, 1999, he must have completed the rank under the new rules.

Cycling and/or Hiking could not be counted as Eagle-required badges for a rank if the Board of Review was earlier than January 1, 1999.

For a scout to earn the Life rank using badge list #3, he must have a total of seven Eagle-required badges from the core list and list #3. For example, let's suppose a scout earned Star under list #2 using Basketry, Archery, First Aid, Camping, Safety, and Sports as his merit badges. In order to earn Life using list #3, he would then have to complete five more Eagle-required badges because Safety and Sports cannot be counted toward the needed total of seven. This is based on guidance we received from BSA National.

As you can see, all of this can get very complicated. To help you out, TroopMaster handles as much of this for you as possible. The program has a powerful automatic merit badge placement function. TroopMaster will automatically monitor all of your entries in each scout's advancement records to determine which badge list(s) are applicable to each scout. Using this information, TroopMaster then computes the best possible arrangement of his completed merit badges to expedite completion of his next rank.

For example, if TroopMaster determines that the scout could legally complete Star under badge list #2 or #3, it will compare the number of list #2 badges he has to the number of list #3 badges. Whichever list gives him the most Eagle badges toward Star is the one it will use. If this comparison results in a tie, TroopMaster will go with list #3. However, TroopMaster will reevaluate the badge placement after every new advancement entry. For example, if you enter a service project completion date of 4/2/99, TroopMaster will abandon badge list #2 and switch to badge list #3.

## APPENDIX D. DISABLED SCOUTS

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TroopMaster includes a feature that allows you to disable the Eagle-required merit badge rules for selected scouts. If you have one or more scouts who are being allowed to complete alternative badges, bring up his *Individual Advancement* dialog and press ALT-D. This will open up a new “Disable Eagle MB rules” checkbox on this dialog.

To turn off the Eagle-required merit badge rules, check this box. You will be asked to confirm the request. If you do, the standard Eagle-required status messages on the Star, Life, and Eagle dialogs for the scout will be replaced with the following message: “Eagle MB rules checking has been disabled.”

TroopMaster will not perform any Eagle-required merit badge checks for a disabled scout. You will be able to enter any merit badge under any rank. Also, reports such as the *Individual Progress* report and the *Unit Advancement Status* report will only show how many total badges the scout needs for his next rank. It is up to you and your local council to ensure that the scout gets all of the badges needed for promotion to Eagle.

If you want to restore Eagle rules checking for a scout, clear the “Disable Eagle MB rules” checkbox. TroopMaster will revert to automatic badge placement mode and will sort and reapply every merit badge the scout has earned. When it finishes placing the badges, any Boards of Review that are no longer valid will be erased and, if appropriate, the scout will be demoted.

## APPENDIX E. RECHARTER GUIDANCE

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BSA recharter rules require that you charter adult leaders in certain key positions based on the type of unit being chartered. You rarely have to charter all of the adults in your unit although there are benefits (such as insurance, Scouting Magazine, etc.) available, so you should consider chartering more than the minimum. Another consideration is that BSA runs background checks on registered leaders.

This appendix provides guidance on the required positions for each unit type. This information is current as of the date that this software version was released.

You must charter a leader in each of these positions using a status of Paid, Multiple, or Transfer. The “Non-registering” status cannot be used. Except for the Executive Officer, a leader can only be chartered as “Multiple” if he was registered as “Paid” by another unit and that registration has not yet expired. The Executive Officer is the head of your Chartering Organization—you never have to pay for this person so he is always chartered as a “Multiple”.

The required positions for all unit types are as follows:

<u>Position</u>	<u>Position Code</u>
Executive Officer	IH
Chartered Org Rep	CR
Committee Chair	CC
Committee Member	MC (two are required)

The same leader can be chartered in more than one of the above positions. For example, the same leader can serve as the Executive Officer, Chartered Org Rep, and/or Committee Chair or Committee Member. However, the same leader cannot be chartered as both the Committee Chair and a Committee Member, nor can the same leader serve in one of the above positions and one of the positions listed below.

The following additional positions are required based on unit type:

- 1) Troop: Scoutmaster (SM)
- 2) Team: Varsity Coach (VC)
- 3) Crew: Crew Advisor (NL)
- 4) Ship: Skipper (SK)

Unless you’ve been granted an exception by your Scout Executive, you must also charter at least five scouts. Scouts must meet BSA age restrictions based on unit type and whether or not you’re chartering as an LDS unit. However, the age restriction can be waived for a scout who has been designated as having “Special Needs” on his personal data dialog.

Chartering leaders in assistant positions (SA - Assistant Scoutmaster, VA – Assistant Coach, NA – Associate Advisor, MT – Mate) is always optional. TroopMaster processes patrol advisors as assistant scoutmasters.

## APPENDIX F. AVERAGE TIME TO RANK FORMULA

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For each *Rank Badge Matrix* report, TroopMaster calculates the average amount of time it takes for a scout in that unit to advance from Scout to 1<sup>st</sup> Class, Star, Life, and Eagle. This appendix explains the formula used in these calculations.

For each rank, TroopMaster first examines all scouts who have earned the rank and computes the average time it took them to do that (i.e., the “Base Average”). Then, it considers all scouts who have been scouts longer than the Base Average but who have not yet earned the rank. This time will be used to increase the average time for that rank via the following formulas:

$$\text{Base Average} = (\text{DF} / \text{NF})$$

$$\text{Average time to rank} = ((\text{DF} + \text{DS}) / (\text{NF} + \text{NE}))$$

Where:

DF = total days it took all scouts who have earned the rank to earn it

DS = total days since joining Boy Scouts for scouts who are below the rank and whose service time exceeds the Base Average. For the purposes of this calculation, a scout is considered to have “joined” when he has completed the Scout badge requirements.

NF = number of scouts who have earned the rank

NE = Number of scouts who are below the rank and whose service time exceeds the Base Average

The computed average is expressed on the report in months/tenths:

$$(\text{Average time in days} \times 12) / 365$$

## APPENDIX G. TECHNICAL SUPPORT

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Virtually everything you need to know about using TroopMaster is readily available without your having to contact us. We recommend the following approach:

- 1) First, consult the on-line help. Every dialog has a **Help** button that will display the section of the manual applicable to the dialog being displayed. Also, the main menu has a **Help** option that gives you access to the on-line help through several different avenues, including an index “search” feature.
- 2) Consult the User Manual. To see it, start TroopMaster and select **Help/View User Manual** (requires Acrobat Reader 4.0 or newer).
- 3) Visit the “Frequently Asked Questions” ([FAQ's](#)) page on our web site. There is a separate FAQ's page for TroopMaster.

If you still cannot find the answer you need, contact us directly. While we cannot accept collect phone calls, we are available to answer questions at 434-589-6788 (Mon-Fri 9AM-5PM EST). Simple questions can also be handled via our Technical Support form on our web page. Detailed questions require that you call us.

Replacement CDs outside of the warranty period are \$10, including shipping/handling.

<p>We have always tried to provide the very best technical support available, completely free to our users. However, the advent of email threatens our ability to continue doing that. For many of the email questions we get, the answer is easily available through the on-line help or the User Manual. Please help us keep our user support free by not contacting us directly unless you cannot find the answer yourself.</p>
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