

Online Unit Toolbox System (UTS) Basic Instructions for Unit-Level Volunteers

1. The Northern Star Council Unit Toolbox System website is at <https://www.northernstarbsa.org/toolbox/>. One of your key unit leaders (committee chair, Cubmaster, Scoutmaster or Adviser) may already have access to the system, they can grant you access – contact them first about gaining access. If your unit does not have access, your district executive or district membership chair can provide you login rights to access your unit once you provide them your name, your associated unit, your email address and evening phone number. In most areas of this website, hover your mouse over fields to see more info.
2. Why should unit leaders use this Unit Toolbox System?
 - Provides a central source of information about all units in our council's area
 - Potential members and parents can find your unit geographically on the internet and they can find out when and where your unit meets, and who to contact for questions
 - Your unit can order school promotional fliers and other recruitment supplies for youth recruiting events through the web site and pick these up at either Scout Office or your choice of many Office Max Store locations (at the Impress Printing counter)
 - Your unit can post dates, times and locations for recruiting, FOS events (FOS event info instructions are in a separate document at this time) and youth protection training for youth. This ensures support by the district/council and additional publicity on the web
 - Your unit can enter your National Journey to Excellence information as well as review adult leader training records. Youth protection training for you can be recorded too.
3. As a first time user, immediately change your password upon your initial login (by clicking the 'change my password' on the left side of the home page) to something you can remember.
4. There are three areas in the system that you should immediately update upon gaining access to the system; these are noted in **bold white text and black background**. Other areas can be reviewed and customized at a later time.
 - Pre-populated unit information is correct and blank fields are filled out
 - Unit leadership is correct and additional leader information is added if desired
 - Arrange to promote a future recruiting event – enter date, time, location, order fliers and/or other recruiting support materials
5. Go into the **Unit Management Function**
The screen will populate with your basic unit info on the 'General' tab (there are 10 functional tabs within the 'Unit Management' area)

The screenshot shows the Northern Star Council Youth Recruitment Planner interface. The top header includes the council logo and the title 'Youth Recruitment Planner'. The main content area is titled 'Unit Management' and features a sidebar with navigation links: Home, Recruiting Resource Library, Help, Logout, Unit Management (selected), Order Management, and Change My Password. The main panel contains filters for 'Filter by district' (set to Polaris), 'Filter by unit type' (set to Pack), and 'Select a unit' (set to Pack 3077 (Polaris)). Below these filters, there are tabs for 'Pack 3077 (Polaris)' and 'General'. The 'General' tab is active, displaying a message: 'General information about this unit is provided here. Much of the information is displayed on the public unit search sites at www.AdventureIsCalling.org or Join.ExploreNow.org. Hover over any field for more information about it. Be sure to click 'Save' before switching tabs to avoid losing your changes.'

- General Tab:** This area is pre-populated with the unit sponsoring organization/chartered partner. Notify your district executive at 763-231-7201 to indicate your unit as “Participating in recruitment campaign” they will click the drop down menu and select “yes”. Enter specific unit data that will go onto the public unit locator website (www.AdventureIsCalling.org and www.Join.ExploreNow.org) – it is important to provide your unit's specific information in order to populate the new unit locator public website. This will help the public website viewers learn more about your unit (when it normally meets, unit website link, etc.) Enter ‘About this unit’, ‘web site’ (if any) and ‘Unit meeting information’ fields. This page has geographic data for the unit map search function.

Address: <https://www.northernstarbsa.org/planner/UnitManagement.aspx>

Filter by district: Many Waters
 Filter by unit type: Pack
 Select a unit: Pack 9089 (Many Waters)

Pack 9089 (Many Waters)

General | Emphasis | Contacts | Schools | Notes | ZIP Codes | Logins | Events/Fliers | School Events

General information about this unit is provided here. Much of the information is displayed on the public Scouting finder www.AdventureIsCalling.org.
 Hover over any field for more information about it. Be sure to click 'Save' before switching tabs to avoid losing your changes.

Save...

☒ Unit is active

Participating in recruitment campaign: Unknown Recruitment goal: 26

District: Many Waters

Published Unit Number: 89

About this unit (for www.AdventureIsCalling.org):
 Cub Scout Pack 89 would like to invite parents and their boys that are interested in Scouting to join us for one of our Pack meetings. This is a great opportunity to learn more about Scouting and answer any questions you may have.

Web site: www.mahtomedipack89.org

Web host: Go Big Media

Unit Meeting Information

Location: St. Andrew's Lutheran Church, Great Hall Room #1

Address: 900 Stillwater Rd

City, State, Zip: Mahtomedi, MN, 55115

Schedule: Pack Meeting's 3rd Thursday, @6:30 p.m.

- Emphasis Tab:** Units can select some established areas of program ‘emphasis’ based on their unit type (all units default to a ‘general’ program emphasis). Troops, crews and ships can choose more than one area of emphasis. There is one (1) emphasis area for packs, six (6) for troops, twelve (12) emphasis areas for crews, four (4) for Sea Scout Ships, and two (2) for Varsity Teams and seventeen (17) for Exploring Posts.

Address: <https://www.northernstarbsa.org/planner/UnitManagement.aspx>

NORTHERN STAR COUNCIL Youth Recruitment Planner

Home | Logout

Unit Management | Campaign Participation | Unit Events | School Events | Login Management | My Districts

Change My Password

Unit Management

Filter by district: Many Waters
 Filter by unit type: Pack
 Select a unit: Pack 9232 (Many Waters)

Pack 9232 (Many Waters)

General | Emphasis | Contacts | Schools | Notes | ZIP Codes | Logins | Events/Fliers | School Events

Areas of Emphasis help visitors to www.AdventureIsCalling.org find a Scouting unit that best meets their interests. Units may select multiple areas of emphasis (if available).

Areas of Emphasis

Add...

Name	Description
General Cub Scouting Program	Year-round program uniquely designed to meet the needs of young boys and their parents. Program offers fun and challenging activities that promote character development and physical fitness

Remove...

- Contacts/Logins Tab:** Units add, edit, delete their unit contacts and can create a login for their volunteer contacts they want to add. When you add or edit a contact, ensure you select the correct 'contact type' in the drop down menu... committee chair, recruitment chair, contact, Cubmaster (pack), Scoutmaster (troop), Advisor (Venture Crew or Exploring Post) or Skipper (Sea Scout Ship). **Ensure you also grant them a security role (UTS Unit Admin) if you want them to edit/add/change recruiting event and/or create recruitment orders.**

Pack 9817 (Great Rivers)

General | Emphasis | **Contacts/Logins** | Schools | Notes | ZIP Codes | Events/Fliers | School Events

Contacts provide visitors to www.AdventureIsCalling.org and Join.ExploreNow.org a way to connect with a unit to join. To publish a contact's information on these sites add or edit the contact and check the boxes to publish the phone number(s) and/or email address. Contacts are also used to track volunteers in special positions, such as the unit Recruitment Chair. This information is used by district volunteers to help communicate important information. Add or edit the contact and mark the appropriate roles. To provide another member of this unit access, add their contact information and click the 'Create Login' button.

Unit Contacts

Add...

Edit	Delete	Last Name	First Name	Type	City	Has Login	
		Curtice	Brian	YRP Unit Admin [P9817]		<input checked="" type="checkbox"/>	Create Login
		Curtice	Brian	Contact [P9817], Committee Chair [P9817]	Oakdale	<input type="checkbox"/>	Create Login
		Cusick	Kelly	YRP Unit Admin [P9817]		<input checked="" type="checkbox"/>	Create Login
		Miller	Gregg	YRP Unit Admin [P9817]		<input checked="" type="checkbox"/>	Create Login
		Wegscheider	John	YRP Unit Admin [P9817], Cubmaster [P9817], YRP Unit Admin [P9817]	Vadnais Heights	<input checked="" type="checkbox"/>	Create Login

They can have their contact info published to the public unit locator websites and select email notifications they would like to receive. **Only have 2 volunteers from your unit publish their contact information on www.AdventureIsCalling.org** The council office has the staff member that supports your Boy Scout District listed as a contact too. This is in case a prospective member cannot contact the unit contacts listed.

Edit Contact

Hover over any field for more information.

General | **Publish/Notify** | Roles

Publish Settings

Checking the following boxes will publish contact name and information on www.AdventureIsCalling.org and/or join.explorenow.org for this unit.

☐ Publish day phone number

☒ Publish evening phone number

☒ Publish e-mail address

Notification Settings

Control email notifications for this unit.

☒ Send e-mail when event is created.

☒ Send e-mail when event is changed.

☒ Send e-mail when orders are created.

OK Cancel

In the Roles tab of Edit Contact you can change the contact type (or roles) of the volunteers in your unit. Ensure you **select Unit Administrator (login security role)** for anyone who needs the ability to create a recruiting event, order recruiting supplies. The other roles allow volunteers to be a contact for the unit on the AIC web only. They will have no access to the UTS.

Edit Contact

Hover over any field for more information.

General Publish/Notify **Roles**

If a contact has a login, they must have a security role to be able to login to the system and access this unit. All other roles are for informational purposes.

Role Name	Grant/Revoke	Role Selected	Description
YRP Unit Admin	<input type="button" value="Change"/>	<input checked="" type="checkbox"/>	Unit Administrator (login security role)
Cubmaster	<input type="button" value="Change"/>	<input type="checkbox"/>	Pack Leader (non-security role)
Committee Chair	<input type="button" value="Change"/>	<input type="checkbox"/>	Unit Committee Chair (non-security role)
Recruitment Chair	<input type="button" value="Change"/>	<input type="checkbox"/>	Membership Recruitment Chair (non-security role)
Contact	<input type="button" value="Change"/>	<input checked="" type="checkbox"/>	Generic role for non-login users.

- **Schools Tab:** Schools the unit is associated with for recruiting. If any are incorrect you can submit edits/corrections by using the link provided.

Address <https://www.northernstarbsa.org/planner/UnitManagement.aspx>

NORTHERN STAR COUNCIL Youth Recruitment Planner

Home
Logout

Unit Management
Campaign Participation
Unit Events
School Events
Login Management
My Districts

Change My Password

Unit Management

Filter by district:

Filter by unit type:

Select a unit:

Pack 3236 (Crow River)

General **Emphasis** **Contacts** **Schools** **Notes** **ZIP Codes** **Logins** **Events/Fliers** **School Events**

Schools associated with a unit are used on www.AdventureIsCalling.com to help potential members find a unit near them. School associations are also required when ordering fliers for distribution at a school.

School associations are maintained by council staff, other users should click the report errors/omissions link below.

[Associated Schools](#)

Name	Address	City	State	ZIP Code
Hutchinson Park Elem	100 Glen St. S	Hutchinson	MN	55350
Hutchinson West Elem	875 School Rd.	Hutchinson	MN	55350
Our Savior's Lutheran	800 Bluff St. NE	Hutchinson	MN	55350
St. Anastasia	400 Lake St. SW	Hutchinson	MN	55350
St. John's Lutheran (Hutch)	60903 110th St.	Hutchinson	MN	55350

[Click here to report errors or omissions.](#)

- **Notes Tab:** Area for district and council staff to type notes regarding a unit's recruiting process.

- **Zip Codes Tab:** Area for unit/district leaders to add or delete zip codes that the unit serves (people visiting the public unit locator web can search by school, zip code and area of emphasis to find a unit). Ensure you have the appropriate zip codes listed that are associated with your unit's service area.

Address: <https://www.northernstarbsa.org/planner/UnitManagement.aspx>

NORTHERN STAR COUNCIL Youth Recruitment Planner

Unit Management

Filter by district: Metro Lakes
 Filter by unit type: Pack
 Select a unit: Pack 3024 (Metro Lakes)

Pack 3024 (Metro Lakes)

General | Emphasis | Contacts | Schools | Notes | ZIP Codes | Logins | Events/Fliers | School Events

Zip codes are used to help potential members find this unit on www.AdventureIsCalling.org. The Sponsoring Organization and Meeting Location zipcodes (on the General tab) will always be searched, additional zipcodes can be added here.

Additional ZIP Codes

Add...

	ZIP Code
Edit... Delete...	55406
Edit... Delete...	55414
Edit... Delete...	55454
Edit... Delete...	55455

- **Events/Fliers Tab:** Add a new recruiting event or unit meeting, or edit/delete an existing one. Click the 'Add' button to create a unit event. This opens up another window with five other tabs. Order promotional material by clicking that button.

Pack 9817 (Great Rivers)

General | Emphasis | Contacts/Logins | Schools | Notes | ZIP Codes | Events/Fliers | School Events

Unit events can be displayed on the public unit search sites (www.AdventureIsCalling.org/Join.ExploreNow.org) and provide potential members with more information about this unit and opportunities to join. Events may include regular unit meetings, camping trips, and other outings. **Events up to 90 days past are shown.** (Admins: Use Unit Events page for older events.)

Recruitment events, entered here, are special events designed for potential new members. Results of recruitment events are entered here to assist the Membership Committee in tracking the health of our programs.

Promotional Materials: Use the following button to order promotional materials for your event. **If you are ordering custom fliers you must have an event entered below.**

Order Promotional Material

Flier Orders: After adding an event, click 'Order Fliers' next to the event to request custom fliers with all event information already entered.

Unit Events

Add...

Add an event and then order custom promotional fliers (for recruitment events)

Edit	Delete	Event ID	Date/Time	Event Type	Name	Description	Flier Orders
		2041	4/29/2011 6:00 PM	Recruitment	Skyview Carnival	School Carnival for kids - Pack will set up PWD track for recruitment	0
		2018	1/22/2011 12:00 PM	Recruitment	Pinewood Derby	Gentleman, Start Your Engines!	1

1. **General Tab:** Select your event type(ensure to choose **recruitment** even if you are recruiting as part of a unit meeting or a unit activity). The other fields are self explanatory. Realize this information will be on the public unit locator website if the checkbox is selected.

2. **Presenter Tab:** Request a presenter for a recruiting or FFOS event or tell us who your unit presenter is.

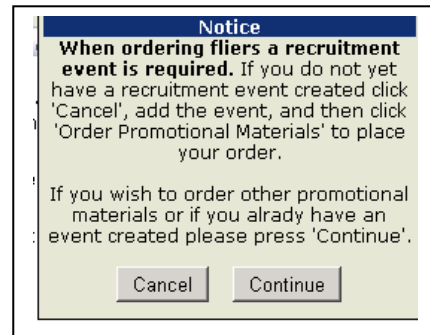
3. **Details Tab:** This tab is an area for leaders to provide more information about the event that will be published on the public unit locator web sites:

www.AdventureIsCalling.org or www.Join.ExploreNow.org.

4. **Notes Tab:** This is used to provide any other information about the recruiting event.

5. **Results Tab:** This area is for entering your youth/adult recruitment results for this event. The fields are; number of youth that attended, number of youth recruited (filled out an application), number of adults recruited (filled out an application) and then the date you plan to turn in the applications/fees to the Council Office.

- Ordering Promotional Material:** Once you click the 'Order Promotional Material' button a 'Notice' warning window opens up. **If you are ordering custom fliers, you MUST have an event entered in the system to do so.** Click cancel if you need to enter a recruiting event. Click continue if you have already entered your recruiting event information or you are only ordering materials other than custom fliers. You need to choose one of the council offices or one of several Office Max Stores (at the Impress Printing counter) for your order pick-up location. Ensure you have entered the correct pickup contact name (you or one of your unit leaders), phone number and date needed. We need 3 business days to process your order, so this is what it defaults to. Click 'start order'. Click edit to enter the quantity of a desired item. Select the items you want carefully, realize that some are already in the recruiting packet you might already have. Double click a thumbnail to view an item. Upon completing your order click the 'submit order' button. Upon clicking "submit order" a dialog window will appear confirming your order has been submitted.



Order ID:	New...	Pickup Location:	No Location Selected
Unit:	Pack 3077	Pickup Contact Name:	
Status:	New	Pickup Contact Phone:	
		Date Picking Up:	
		Order Creator:	Joe Scouter

Start Order...

Notes:

This is a new order for any of the following items. Items marked with a * have important additional information to review before ordering. Click on any thumbnail for more details. Note that lead time required (if any) is in Business Days. To begin: Complete the information in the fields above and click 'Start Order...'.

Thumbnail	Type	Name	Lead Time (Days)	Max. Quantity
	Flier	5.5x8.5 A Scout is Reverent- Mini	3	Qty for Event
	Flier	8x11 Cub Centennial- Packs	3	Qty for Event
	Flier	5.5x8.5 Cub Centennial- Mini- Packs	3	Qty for Event
	Item	Youth Application*	3	*see item detail
	Item	Adult Application*	3	*see item detail

- **Ordering Fliers:** If you select a custom flier, a new window opens up with a five step process for completing your order. Go to the next page.

1. **General Tab:**

When this window opens, click the drop down for the type of flier you want - there are many to choose from – ensure you select the correct program (pack, troop or crew). Preview the flier style by double clicking the thumbnail icon in the previous screen.

2. **Description Tab:**

This information is pre-populated from your unit recruiting event information you previously entered. You can edit it if you wish on this screen.

3. **Contacts Tab:**

Select which unit contact (s) you want on the flier. You can also add new contact information. If you make any changes to contact information on this screen, the 'Update Text' box will turn red alerting you to click this button to ensure your new text is updated. Upon clicking this box, the text will be updated in the "Printed on Flier: Text Area 3" window.

4. **Distribution Tab:**

Click the Select button under 'Schools to Distribute At' and a new dialog window will open with all of the schools associated with your unit. Check the box on the left side of the dialog window for each school you want to flier. You will notice that for each school associated with your unit, there is a possibility for Electronic Flier Only, Requires Copy Proof (of the flier) and/or Needs a Disclaimer (on the flier). These check boxes are for council staff edits only. If you know that one or more of these boxes should be checked and they are not, contact your district executive and they can make the needed change. Click 'O.K.' to confirm the school(s) you want to flier. If the school district your school is in requires a disclaimer on fliers – this will auto-fill into the text box at the bottom of this window, or a non-school location (no school disclaimers will show on flier).

5. **Order Tab:** Choose 'Order Printed Fliers' and/or 'Order Electronic Copy of Flier' **[only for schools that mandate an electronic (PDF) version be used]**. Enter how many printed fliers you want. Enter if the printed fliers need to be bundled in a certain number of fliers per bundle. You can

preview your custom flier by clicking 'Preview Flier'; this allows you to see the text that will appear on your fliers. If you need to make any edits, simply close the preview flier dialog box and go back to make your changes. If the preview is correct, close the preview dialog box and click 'Save Flier'. You can now view a sample of your flier by clicking the icon under 'View (fliers)' on the order screen. This opens a dialog box that allows you to view a sample flier. Ensure you have entered the correct pickup contact name (one of your unit leaders), phone number and date needed (we need 3 business days to process your order, so this is what it defaults to). You can now finalize your total order, by ordering other recruitment materials or click 'Submit Order' on the Order Promotional Material screen. Upon clicking "Submit Order" a dialog window will appear confirming your order has been submitted. **Your order is now in a pending status, you can edit your order as long as it is in the pending status.** If you have previously selected email notifications, the person that created the order will receive a notification as the order is processed and when it is ready for pick-up.

- **School Events Tab:** This is where boy talks, principal visits and school open house/meet the teacher events can be entered/tracked. **School events can only be created, edited and deleted by district volunteers and council staff.**

- **Friends of Scouting (FOS) Campaign and Journey to Excellence (JTE) Tabs:**
These two tabs are not membership related, but useful and self-explanatory as you review the information.

6. You will notice there are some areas within the online system that you cannot change. You have 'read only' rights. If you have questions about anything that is 'read only', please contact your district membership committee or district executive. Most of your unit information that you create or edit on the Unit Toolbox System site will be on the unit locator web sites at www.AdventuresCalling.org or www.Join.ExploreNow.org. You can verify what public information is viewable by searching for your unit on one of the above public web sites.

7. Order Management:

You can view any order and what status it is in, you can edit any order that is in a pending mode from this screen too.

ID	Edit	District	Unit	Contact	Status	Date Needed	Location
1007		Polaris	3077 (P)	John Overland	Pending	3-22-2011	No Location Selected
1004		Polaris	3077 (P)	John Overland	New	3-24-2011	East Council Service Center- St. Paul
1008		Polaris	3077 (P)	Joe Scouter	Pending	3-29-2011	No Location Selected
1006		Polaris	3077 (P)	John Overland	Complete	3-30-2011	No Location Selected
1002		Polaris	3077 (P)	Pierce Flanagan	Pending	3-31-2011	West Council Service Center- Golden Valley
1001		Polaris	3077 (P)	John Overland	Approved	4-20-2011	Meade County Office-Mo...

8. Common Questions:

- I forgot my password, how do I retrieve it? On the login screen there is a field to enter the username (email address) and a 'Send Password' button that will email the last password to the user.
- I don't remember my username (email address)? At this point in time we do not have an 'I forgot my username' function. It is common for people to have more than one email address these days, so try using another email address as the username. If this does not work, contact your district membership chair or district executive, they have the access rights to delete someone's username and password and provide them a new initial login username and password.
- I have a username and password, but I cannot access the website. The most common reason why is that you were not given a security role (UTS Unit Admin) login to edit/add/change recruiting event and/or create recruitment orders. Contact the unit leader that granted you access to the online UTS to have them give you this access.

9. **Recruiting Resource Library:** On the left hand tool bar, this will link you to a resource library on the council web site that includes unit locator site(s), recruitment supplies order process and other membership resources.

10. **Latest website enhancements:** Click the What's New? link on the homepage of the website.

11. Questions about the Unit Toolbox System should be directed to Toolbox@NorthernStarBSA.org or 651-254-9111.