

Scoutbook Plus is moving away from connections-based permissions and moving toward position-based permissions, which will provide greater performance and permission customization.

## **BACKGROUND**

In Scoutbook Legacy, permission options are limited to “Full Control, View Profile, Edit Profile, View Advancement, Edit Advancement”.

If a leader has the position of Scoutmaster or Troop Admin, their connection is “Full Control” for every youth in the unit, which enables the leader to edit advancement, edit profiles, etc.

However, for other positions such as Secretary or Outdoor Coordinator, connection options were limited and did not translate well to the permissions needed to perform the duties of the position. This results in leaders who are given connection based permissions that are beyond or far less than what they should have as it relates to their position.

## **WHAT'S NEW**

In Scoutbook Plus, a unit can actively change most registered positions (and functional positions) for adults in their unit. For example, a Chartered Organization Representative may now move an adult's registration from Committee Member registration to Assistant Scoutmaster in Scoutbook Plus. Previously, this action could only be performed in My.Scouting.

When assigning leaders to registered or functional positions, these positions will have a base set of permissions, which allows the leader to perform their duties across the full unit or sub-unit.

In addition, leaders may customize and add additional permissions associated. (So, if a leader is Troop Secretary but also helps out recording advancement, the unit can assign the “Advancement Editor including Youth leadership” permission to perform the additional duty.)

Default permissions assigned to positions have been determined by the Guide to Advancement and generally accepted position functionality. Some permissions may only be granted based on position (i.e. approving adults to serve as leaders is restricted to Chartered Organization Rep, COR/CUR Delegate, and/or Council Unit Representative) while many can be assigned to the individual.

### **Scenarios:**

In some units, Advancement Chairs only help with advancement completion recording. While others have advancement chairs purchasing advancement or also recording approval.

Some units want all ASM's doing the exact same jobs across the unit. Some do not.

Scoutbook Plus provides the unit the ability to balance permissions that must be associated with certain positions while providing flexibility to customize for their unit.

Please note:

Some permissions can be granted to youth such as conduct calendar editing, messaging (coming soon), advancement recording (Scout, Tenderfoot, Second Class, First Class for in Troop)

Individual Permissions grant one action to users.  
Functional Positions give a Group of Permissions to the user.

## Individual Permissions

<b>Permission Category</b>	<b>Permission Name</b>	<b>Actions given</b>
<b>Activity</b> - <i>Logs</i>	Create/Remove/Edit/Approve	Deal with Activity Logs
<b>Advancement</b> -	Award Approve Edit MBC Search (Coming Soon)	Enter Awarded for an item Approve an Advancement item Enter a Date or Comment for an Advancement item Search and attach an MBC to a Scout
<b>Calendar</b> -	Create/Edit/Remove	Enter/Edit Calendar info for Unit
<b>Finance</b> - <i>Payment Log</i>	Unit Payment Log Create/Edit Indiv. Payment Log Create/Edit P.O. Create/Edit	Deal with Payment Log at a Whole Unit Levels Deal with Payment Log at an Individual Level Create POs to use to purchase Advancements
<b>Messaging</b> -	Message Create	Compose and Send Messages
<b>Unit</b> -	Profile Edit Unit Edit Reports Sub-unit Create/Remove Sub-unit Edit	Run Reports (all have this to some degree)
<b>Leadership / Membership</b>	These groups are isolated to Key 3, Key 3 Delegates and COR Delegates. Deals with official membership	

Permission Legend

\*= Given - cannot be removed

<sup>a</sup>= Recommended Permission - One button

<sup>o</sup>= Can be given

§= Permissions by Assigned Sub-Unit

**List of Registered and Functional Positions and Default permissions along with other permissions options**

REGISTERED / FUNCTIONAL POSITIONS		
<p><b>Chartered Organization Rep (COR) Council Unit Rep (CUR) COR/CUR Delegate</b>  <b>All permissions given and cannot be removed</b></p> <p><b>Executive Officer</b>  <b>No permissions can be given</b></p> <p><b>Assistant Scoutmaster</b>  <b>Associate Advisor</b>  <b>Mate</b>  <b>New Member Coordinator</b>  <b>Unit Chaplain</b>  <b>Unit College Scouter Reserve</b>  <b>Unit Outdoor/Activities Chair Unit</b>  <b>Rel. Emblems Coord.</b>  <b>Unit Scouter Reserve</b>  <b>Unit Training Chair</b>  <b>No Default Permissions Given</b></p> <p>Activity            Create/Remove/Edit/Approve<sup>o</sup></p> <p>Advancement            Award<sup>o</sup>            Approve<sup>o</sup>            Edit<sup>o</sup>            MBC Search<sup>o</sup></p> <p>Calendar            Create/Edit/Remove<sup>o</sup></p> <p>Finance            Unit Payment Log            Idiv. Payment Log            P.O.</p> <p>Messaging            Message Create<sup>o</sup></p> <p>Unit            Profile Edit<sup>o</sup></p>	<p><b>Other Key 3 (Scoutmaster, Cubmaster, Crew Advisor, Skipper, Committee Chair, Key 3 Delegate, etc.)</b>  <b>All permissions given and cannot be removed - EXCEPT accepting leaders into the unit and assigning Key 3 leaders*</b></p> <p><b>Assistant Cubmaster</b></p> <p>Activity            Create/Remove/Edit/Approve*</p> <p>Advancement            Award<sup>o</sup>            Approve<sup>o</sup>            Edit<sup>a</sup>            MBC Search<sup>o</sup></p> <p>Calendar            Create/Edit/Remove*</p> <p>Finance            P.O.<sup>o</sup></p> <p>Messaging            Message Create*</p> <p>Unit            Profile Edit<sup>a</sup></p> <p><b>Unit Commissioner</b>  <b>No permissions can be given - not registered in the unit</b></p> <p>Permission Legend            *= Given - cannot be removed  <sup>a</sup>= Recommended Permission - One button  <sup>o</sup>= Can be given            §= Permissions by Assigned Sub-Unit</p>	<p><b>Committee Member</b>  <b>No Default Permissions Given</b></p> <p>Activity            Create/Remove/Edit/Approve<sup>o</sup></p> <p>Advancement            Award<sup>o</sup>            Approve<sup>o</sup>            Edit<sup>o</sup>            MBC Search<sup>o</sup></p> <p>Calendar            Create/Edit/Remove<sup>o</sup></p> <p>Finance            Unit Payment Log<sup>o</sup>            Idiv. Payment Log<sup>o</sup>            P.O.<sup>o</sup></p> <p>Messaging            Message Create<sup>o</sup></p> <p>Unit            Profile Edit<sup>o</sup></p> <p><b>Den Leader</b></p> <p>Activity            Create/Remove/Edit/Approve*§</p> <p>Advancement            Award*§            Approve*§            Edit*§</p> <p>Calendar            Create/Edit/Remove*§</p> <p>Messaging            Message Create*</p> <p>Unit            Profile Edit*§            Sub-Unit Edit*§</p> <p><b>Assistant Den Leader</b></p> <p>Advancement            Award<sup>o</sup>§            Approve<sup>o</sup>§            Edit<sup>o</sup>§</p> <p>Calendar            Create/Edit/Remove<sup>o</sup>§</p> <p>Messaging            Message Create*</p>

## FUNCTIONAL POSITIONS

### Unit Advancement Chair

Activity  
 Create/Remove/Edit/Approve<sup>o</sup>  
 Advancement  
 Award<sup>a</sup>  
 Approve<sup>a</sup>  
 Edit\*  
 MBC Search<sup>a</sup>  
 Calendar  
 Create/Edit/Remove<sup>o</sup>  
 Finance  
 P.O.<sup>a</sup>  
 Messaging  
 Message Create\*  
 Unit  
 Profile Edit<sup>o</sup>

### Unit Treasurer

Activity  
 Create/Remove/Edit/Approve<sup>o</sup>  
 Advancement  
 Award<sup>o</sup>  
 Approve<sup>o</sup>  
 Edit<sup>o</sup>  
 MBC Search<sup>o</sup>  
 Calendar  
 Create/Edit/Remove\*  
 Finance  
 P.O. Create/Edit<sup>o</sup>  
 Unit Payment Logs\*  
 Individual Payment Logs\*  
 Messaging Message  
 Create\*  
 Unit  
 Profile Edit<sup>o</sup>

### Calendar Editor

Activity  
 Create/Remove/Edit/Approve<sup>o</sup>  
 Advancement  
 Award<sup>o</sup>  
 Approve<sup>o</sup>  
 Edit<sup>o</sup>  
 MBC Search<sup>o</sup>  
 Calendar  
 Create/Edit/Remove\*  
 Finance  
 P.O. Create/Edit<sup>o</sup>  
 Messaging Message  
 Create\*  
 Unit  
 Profile Edit<sup>o</sup>

### Secretary

Activity  
 Create/Remove/Edit/Approve<sup>o</sup>  
 Advancement  
 Award<sup>o</sup>  
 Approve<sup>o</sup>  
 Edit<sup>o</sup>  
 MBC Search<sup>o</sup>  
 Calendar  
 Create/Edit/Remove\*  
 Finance  
 P.O.<sup>o</sup>  
 Messaging  
 Message Create\*  
 Unit  
 Profile Edit\*

### Digital Media Sales

Activity  
 Create/Remove/Edit/Approve<sup>o</sup>  
 Advancement  
 Award<sup>o</sup>  
 Approve<sup>o</sup>  
 Edit<sup>o</sup>  
 MBC Search<sup>o</sup>  
 Calendar  
 Create/Edit/Remove<sup>o</sup>  
 Finance  
 P.O. Create/Edit<sup>o</sup>  
 Messaging Message  
 Create\*  
 Unit  
 Profile Edit<sup>o</sup>

### Unit Support

Activity  
 Create/Remove/Edit/Approve\*  
 Advancement  
 Award<sup>o</sup>  
 Approve<sup>o</sup>  
 Edit\*  
 MBC Search\*  
 Calendar  
 Create/Edit/Remove\*  
 Finance  
 P.O.\*  
 Messaging  
 Message Create\*  
 Unit  
 Profile Edit\*  
 Sub-Unit Create/Remove\*  
 Sub-Unit Edit\*  
 Den Chief for Packs\*

### Sub-Unit Support

Activity  
 Create/Remove/Edit/Approve\*  
 Advancement  
 Award<sup>o</sup>§  
 Approve<sup>o</sup>§  
 Edit\*§  
 MBC Search\*§  
 Calendar  
 Create/Edit/Remove\* §  
 Finance  
 P.O.<sup>o</sup>  
 Messaging  
 Message Create\*  
 Unit  
 Profile Edit\*§  
 Sub-Unit Create/Remove\*§  
 Sub-Unit Edit\*§  
 Den Chief for Packs\*§

#### Permission Legend

\*= Given - cannot be removed  
<sup>a</sup>= Recommended Permission  
 - One button  
<sup>o</sup>= Can be given  
 §= Permissions by Assigned  
 Sub-Unit