UNIT MANAGEMENT SOFTWARE

PROCEDURE No. 112

Re-chartering using PackMaster

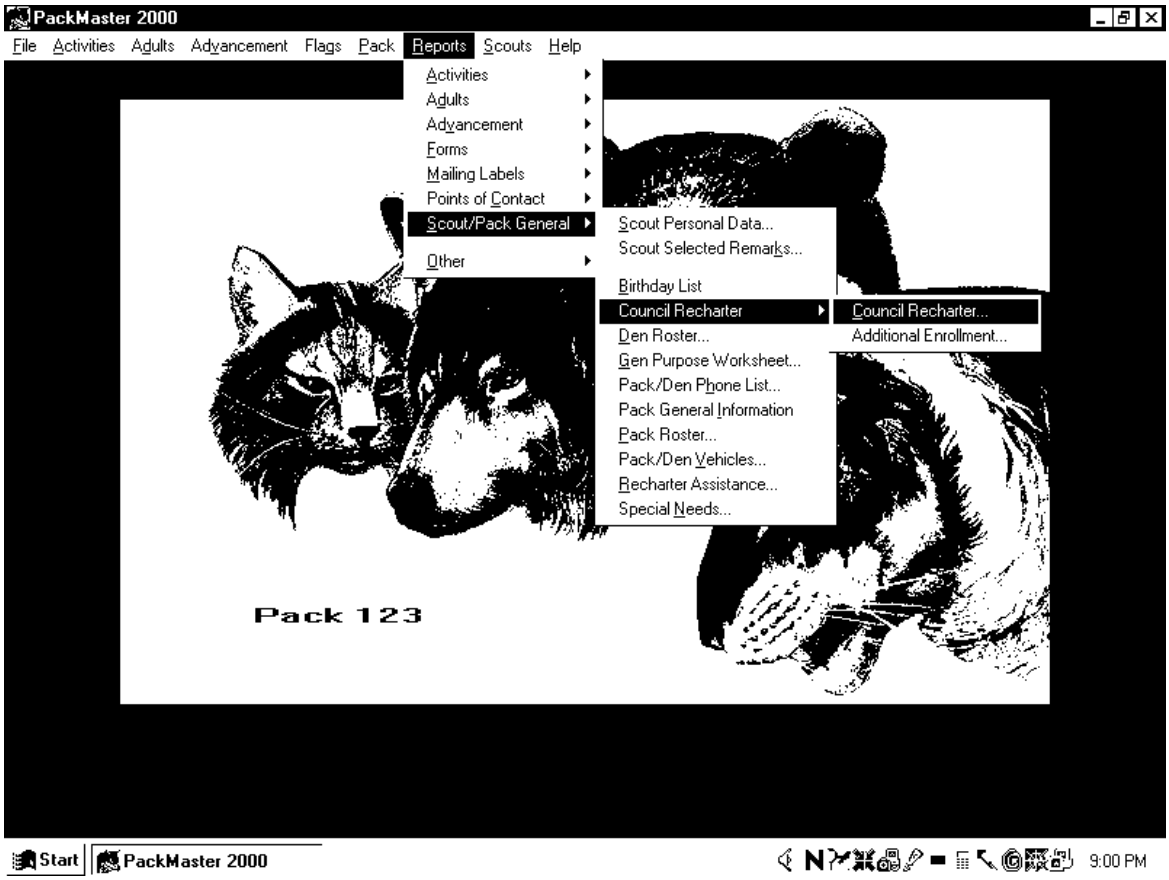
Purpose: This procedure is written for the pack, to be used as a step by step guide when using PackMaster to help with the re-chartering process.

Scope: When this procedure is finished, the pack computer will have printed the forms with all info needed to re-charter. These forms still need signatures and review. The pack computer will also create a diskette to give to your council office. This diskette will save your council the effort of manually retyping your charter info into their ScoutNET computer.

Procedure:

1. Double click on the PackMaster Icon, on your desktop. This should take you to the PackMaster main screen, with the camping screen.

2. First click on **Reports**, next click on **Scout/Unit General**, next click on **Council Re-charter,** last click on **Council Re-charter** as shown below.



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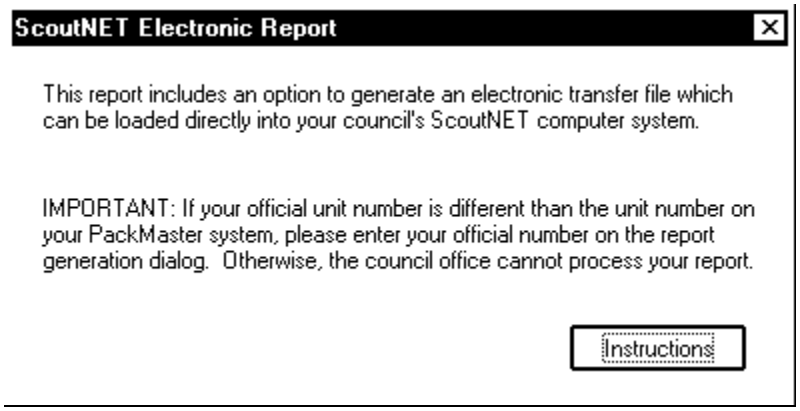
3. If this is your first time using PackMaster to recharter an information screen will appear. Your council does have ScoutNET, so click on **Instructions** to get a list of Recharter Tips.



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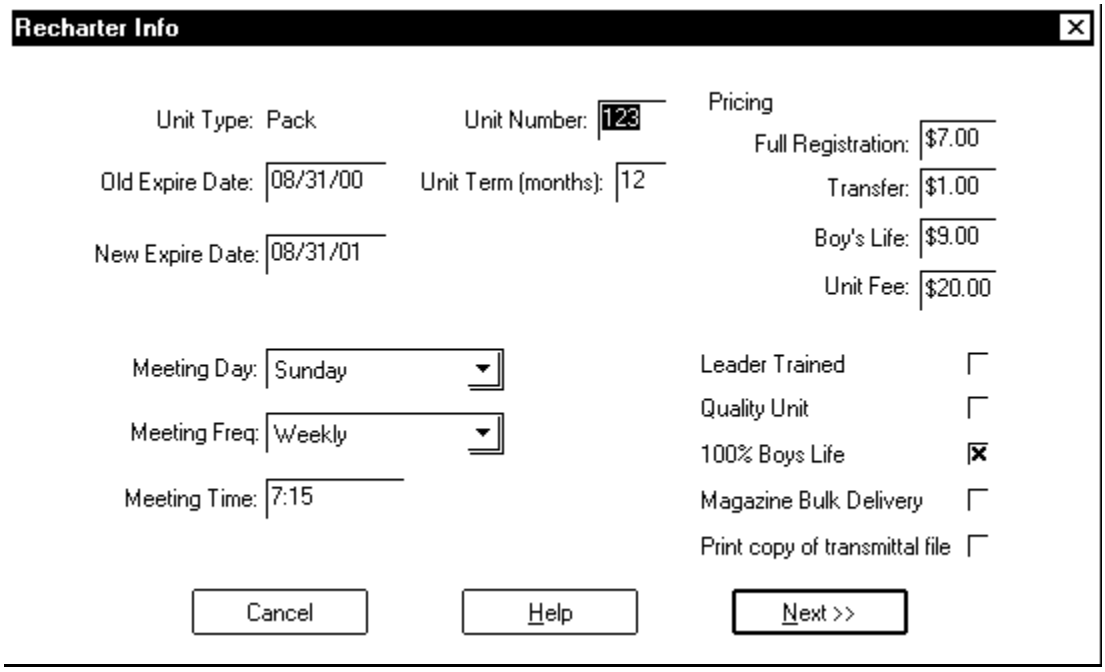
4. Council Re-charter Information.

This is the basic information needed to generate the report. It includes the old pack expiration date (obtained from the Pack General Information dialog) and the new expiration date, as well as your meeting day, frequency, and time. Some pack's official pack number is different from the one they commonly use, so you can change that, if necessary. The unit term is usually 12 months, unless the pack is new. The 'Pricing' figures list the costs that were in effect when this version of PackMaster was developed. These can be adjusted as changes occur.

This dialog includes check boxes for Leader Trained, Quality Unit, 100% Boys Life, and Bulk Mailing. PackMaster will examine the Scoutmaster and scout records and preset the Leader Trained and Boys Life check boxes for you.

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



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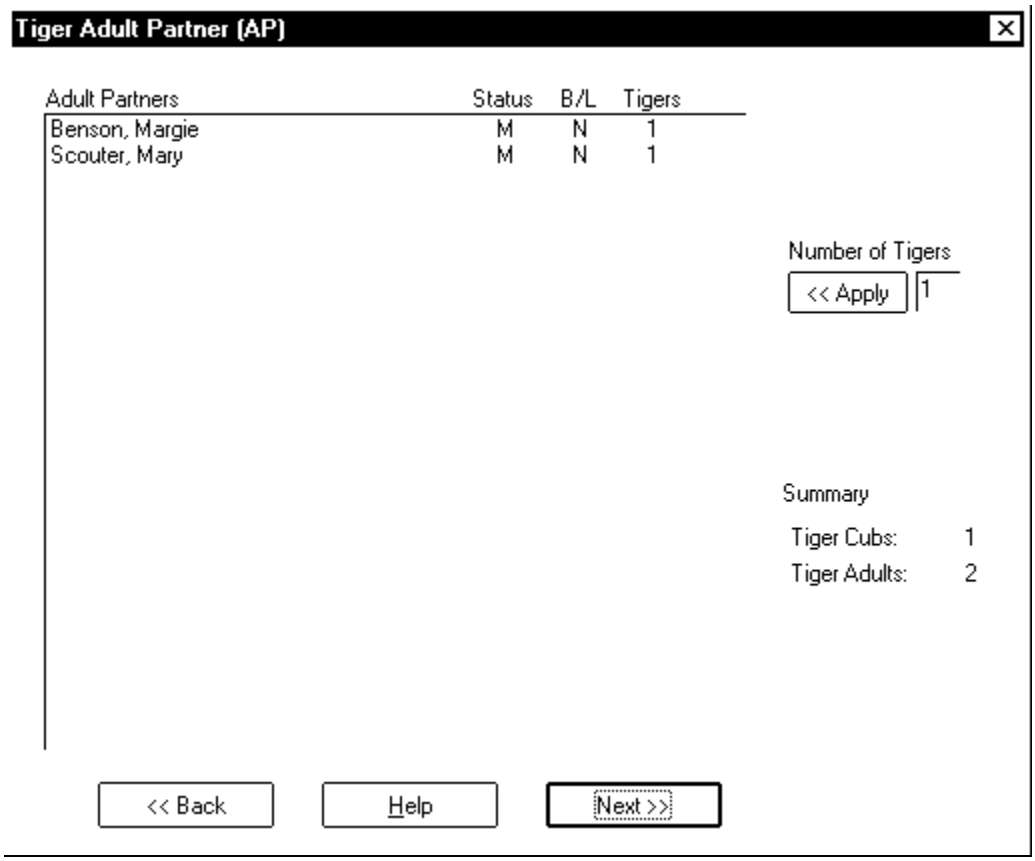
5. **Tiger Adult Partner.**
This dialog lists your Tiger Den Coordinator and all adults who have been designated as Tiger Adult Partners. If any of these adults works with more than one Tiger (e.g., parent of twins), highlight the adult's name, enter the number of Tigers s/he works with, and click Apply. The 'Summary' area makes it easy to see whether you have enough Tiger Adults for the Tigers in your pack.

All Tiger Cub Adults need to be added to the Adults/Leaders area of the database and assigned to a leadership position of 'Tiger Adult'. To simplify this process, if an adult is currently listed on the 'Parental Data' tab on the scout personal data dialog, you can add the parent to the adults file by checking the 'Tiger adult' box next to his/her name. This will copy the parent to the adults file and automatically set the leadership position to 'Tiger Adult'. If you don't want to include Tiger Adults on your adult leader reports (i.e., Leader Roster, etc), turn off the 'Pack leader' check box on the adult personal data dialog.



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6. **Re-charter Selection.**
   This dialog is used to select the scouts and adults who will be chartered and to indicate their charter status. For example, to mark specific scouts (or adults) as 'Paid', highlight the desired names 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(s), highlight the name(s) and click Reset. This will erase the entries for the highlighted names.

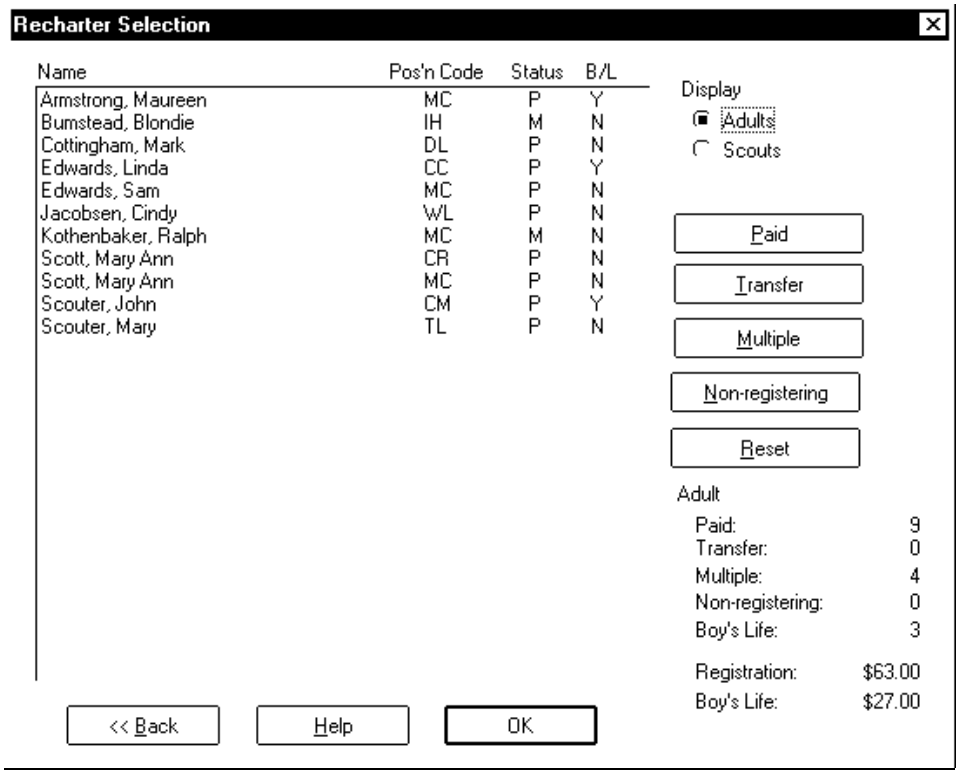
   NOTE: Only adults who have been assigned a leadership position or are receiving Boys Life will be listed on the selection screen.

   Everyone adult or Scout that you wish to register must have Something in the Status column. Check and recheck these screens, because the adults and Scouts selected here will be the roster for your new charter. Double check the position code to be sure it is correct.

   When you are finished, click **OK** on the Re-charter Selection dialog to generate the report.

   See a picture of the screens on the next page.

7. Re-chartering Adults Screen



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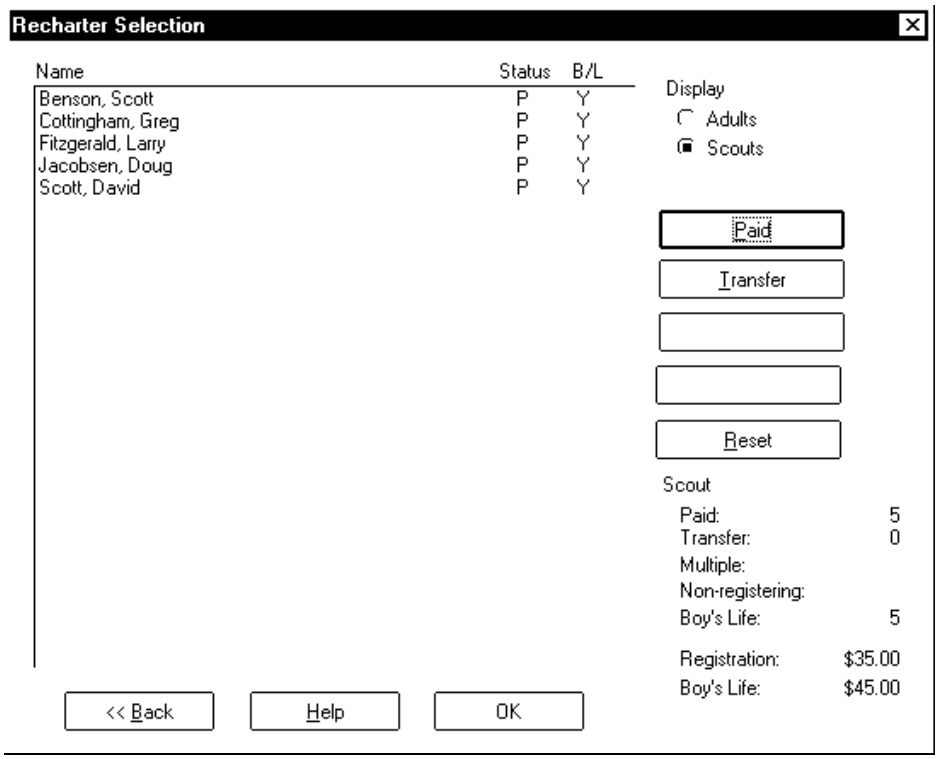
8. Re-chartering Scouts Screen



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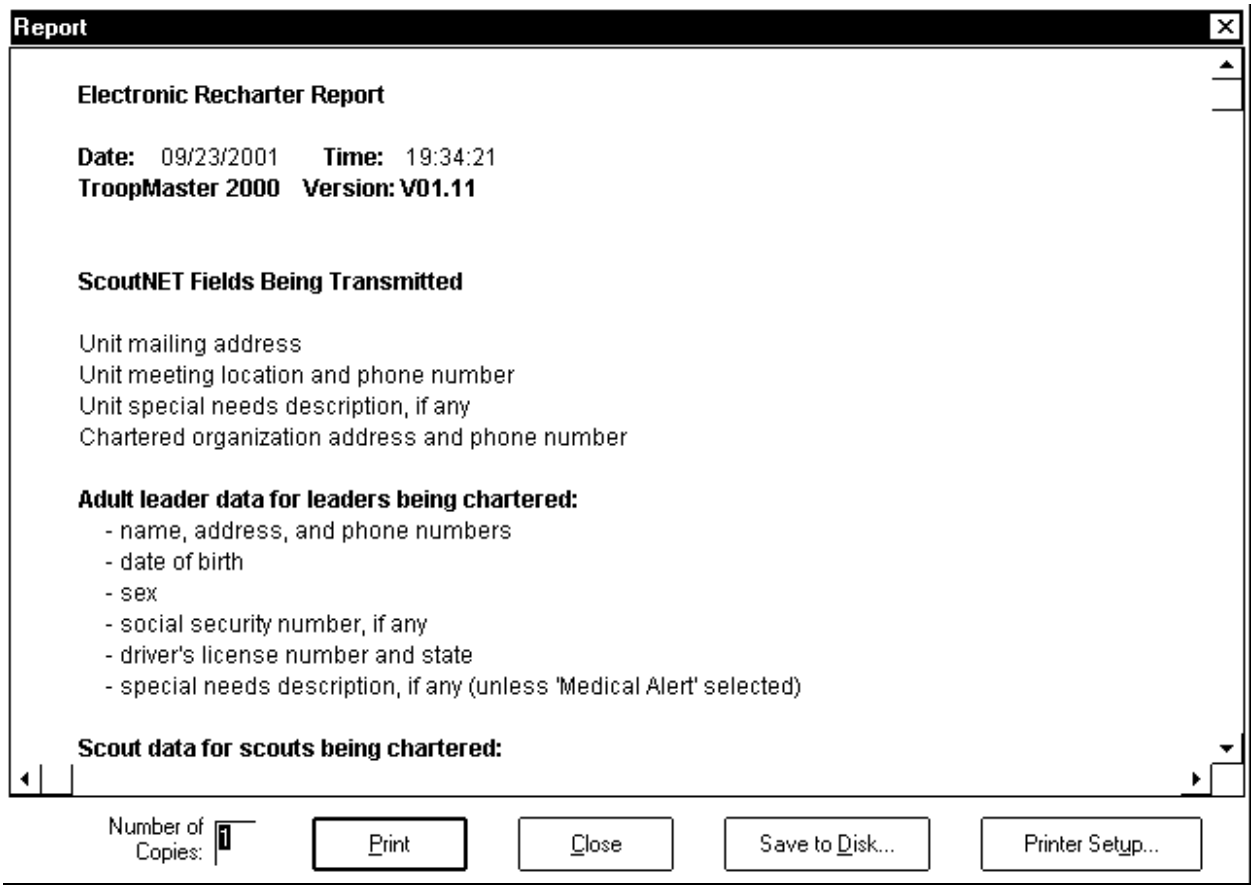
9. PackMaster will display a final dialog that lets you print your report if you are satisfied with the report as shown, on the screen;
Click on the **Print** button to print the paper copy of the report.
Click on the **Print** button again if you want a second copy or set the number of copies

Click **Close** to continue and to exit this screen.

The **Save to disk** button is for a local copy of the report on your hard drive. It is not a copy to diskette that is given to your council for ScoutNET. That ScoutNET diskette will be generated a few more steps into the procedure.

Remember to sign the printed report and submit the signed report with the diskette to your council. A review with your unit commissioner or your district executive may be required also.



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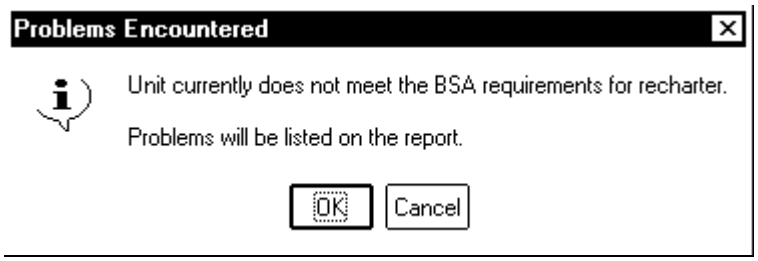
NOTE: Re-charter selections you make are retained until you exit the program. When you exit, the selections are reset to the system defaults.

10. You may go directly to step No.9 if no errors are encountered.

11. PackMaster will check everything to be sure your charter is correct. Unfortunately the program cannot correct items that have been omitted; however it does give you error codes and helpful hints. For example you may see the following error: The problems encountered will be listed in the middle of the report.



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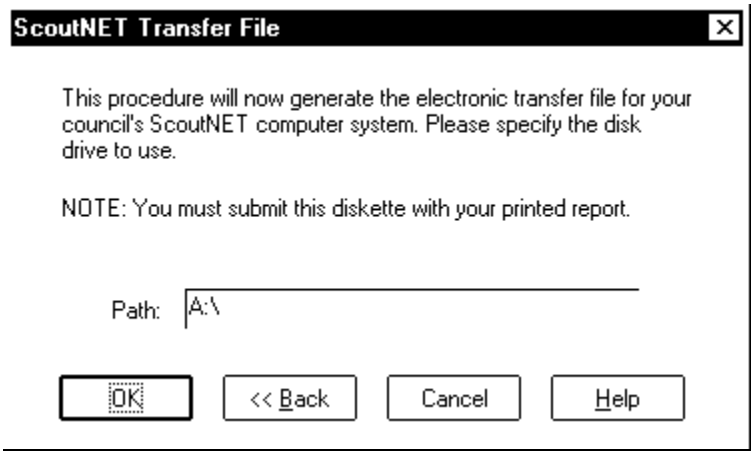
12. You will find the problems listed in the middle of the report. The following is a partial list.

13. The following active window will allow you to generate a diskette for ScoutNET.
Only specify the floppy disk drive, usually "A". Do not enter a file name.
Click "**OK**"



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14. Insert your blank Diskette into your floppy disk drive and Click **"OK"**.

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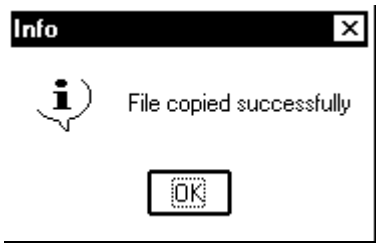
15. If everything goes will the following active window will appear.
    And a file with the name "CHTCXXXX.CSV. XXXX is your pack number.



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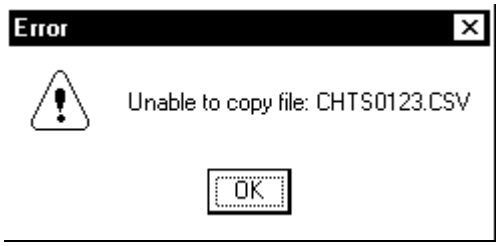
Or you may get the following active window which means the file could not be written.

A. It could be the diskette was not in the floppy drive.
B. It could be a bad diskette.
C. It could be a bad floppy drive.



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16. You have now created the diskette and the paper work. Don't run off to your council service center just yet. You must get the signatures needed, you must write the check for the fees, and you must talk to your unit commissioner. Seeing your unit commissioner may save you a trip to the council office if there are any errors with the signature, the fees, etc.

    There are three fields that appear on the paper report that cannot be set from within the program: County, Unit Status, and On Time Unit. These fields are not part of the ScoutNET data transfer file that is written to diskette. Entries in these fields must be done manually. The "County" entry is self-explanatory. The "On Time Unit" field is completed by the district leader and it indicates whether or not you submitted your re-charter report on time. The District Leader also completes the "Unit Status" field.