

# **Unit Visit Tracking Getting Started Guide**

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## Overview

Welcome to Unit Visit Tracking. Here commissioners can record and manage unit visits.

Unit Visit Tracking contains these modules:

- [Adding a Focus](#)
- [Adding a Visit](#)
- [Editing a Visit](#)
- [Viewing a Visit](#)

## Who can use UVTS?

All commissioners can access Unit Visit Tracking; however, your view within the site and the actions you can perform there depend upon your commissioner role. Commissioners can view, add, and edit visit information; and they can view their most recent five visits in the Recent Visits frame on the Home page.

- Commissioners can *add* visit information about the units within the council organizational structure to which they are assigned.
- *Unit* commissioners can *view* the visits made by commissioners in their district.
- *District* commissioners can *view* the visits made by commissioners in their district.
- *Council* commissioners can *view* the visits made by the commissioners in their council.

### *What is an administrative commissioner?*

An administrative commissioner is an active member registered in at least one of these positions:

Council Commissioner (15)

Assistant Council Commissioner (16)

District Commissioner (81)

Assistant District Commissioner (82)


Roundtable Commissioner (83)

Roundtable Staff (84)

## Navigating UVTS



From the menu at the top of the home page:

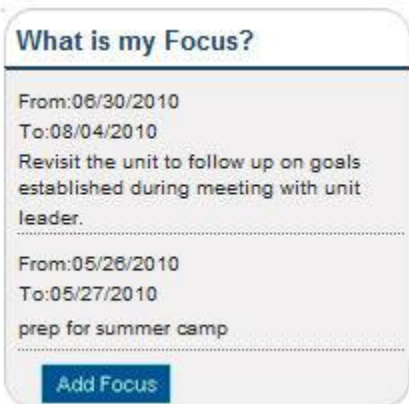
- Click **Visits** to view, add, or delete a visit.
- Click **Focus** to add a focus, or reminder, for follow-up or future visits.
- Click **Help** to access the UVTS help. Each page contains a help icon (  ) with context-sensitive help for that page.

### What is my Focus?

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A focus is a note, or reminder, you can add to unit visit information for future reference. You might use this information for follow-up unit visits.

Click **Add Focus** to go to the Focus page where you can view, add, edit, or delete a focus.



## Recent Visits

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Commissioners can see their last five visits in the Recent Visits section (left frame) of the UVTS home page. You can see all visit reports within your district or council organizational structure on the Visits page.

- From Recent Visits, click the date link to view and/or edit details of the visit.
- From the menu at the top of the page, click **Visits** to view all visits on the Visits page.

Click **Add Visit** to go directly to the Visit Management page, or click the date link to edit that visit.

**Recent Visits**

[07/04/2010](#)  
Nell Colbert  
Unit Activity  
adult: 50 youth: 22  
5 out of 5 quality indicators

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[07/03/2010](#)  
Nell Colbert  
Unit Meeting  
adult: 15 youth: 40  
2 out of 5 quality indicators

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[07/03/2010](#)  
Nell Colbert  
Unit Activity  
adult: 15 youth: 50  
0 out of 5 quality indicators

---

[07/01/2010](#)  
Nell Colbert  
Unit Activity  
adult: 15 youth: 40  
0 out of 5 quality indicators

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[06/25/2010](#)  
Nell Colbert  
Unit Activity  
adult: 20 youth: 50  
3 out of 5 quality indicators

[Add Visit](#) [More](#)



# Visit Management

## Visit Management page

From the Visit Management page, you can add a visit, quality indicators, and comments.



## Viewing a visit

The Visit page contains a list of unit visits in the commissioner's district or council. The default view contains those visits within the organization structure for your commissioner position. For example, district commissioners can view visit information for the district assigned to them; council commissioners can view the information for the units registered within their council.

## Visit information

Click the **Visit Date** link to view or edit a visit; or click **Comments** to view notes about the visit.

Visit Date	Attendees	Visit Type	Unit	District	Commissioner Name	Charter Date	Tenure	Expire Date	Charter Status	Quality Indicators	Comments
07/04/2010	Adult: 50 Youth: 22	Unit Activity	Troop 0058	Little Eoon	Nell Colbert	12/09/2005	49	12/31/2010	R	Planning: Yes Program: Yes Leadership: Yes Tone: Yes Attendance: Yes	<a href="#">Comments</a>

## What are quality indicators?

## Quality Indicators


Quality indicators are observations that measure the quality of visits and the level of engagement.

Quality Indicator	Definition
Planning	Did the observed program reflect prior planning and adequate preparation?
Program	Was the observed activity appropriate to the stated advancement and program objectives for this unit?

Leadership	Was adult (and age-appropriate youth) leadership present during this activity?
Tone	Did the Scouts appear to enjoy and be engaged with the program activity?
Attendance	Was actual attendance at this activity at or near the number of enrolled youth?

## Filtering visit data

Customize your view of the visit data that appears on the Visits page using the filtering feature. For example, view only visits within a specified district or unit. You can further refine your view by selecting a date range for the visits you want to see. The Role Selection menu contains those commissioner position(s) in which the commissioner is registered. *To filter visit data:*

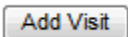




1. Click the filter icon. 
2. Click the down arrow by the structure you want to filter. For example, to view visits within a specified council, click the down arrow and select the district to view. Additionally, select a commissioner, when available, and a unit. To search for a specific unit, click **Search** to the right of the **Unit** field, and enter the requested unit information in the Search Units window.

**Note:** These selections are based on your role. For example, if you are a district commissioner, you can select from the district assigned to you in the District filter. Then you could also narrow the results to specific units. Other options may not be available to you. You can view **ONLY** items within your role structure. If you have more than one role, such as for both the council and in a district, your view will change based on the Role Selection made.

3. Select a **From** and **To** date to narrow your search to those visits falling within the date range selected.
4. Select your filters and click **Submit**. Scroll down the page to view the visits within the filters you have set.
  - District and unit commissioners can view visit information on this page. Commissioners will see visits within the organizational structure for their commissioner position; for example, district commissioners can view visit information for the district assigned to them.
  - Council commissioners can view the information for the units registered within their council.

## Visits page icons

These icons appear on the Visits Page.

Icon	Definition
	<p>Add a visit on the Visit Management page. <a href="#">Adding Visits</a></p>
	<p>Filter (customize) the visit information you see on the Visits page. <i>To filter visit data:</i></p> <ol style="list-style-type: none"> <li>1. Click the filter icon. </li> <li>2. Click the down arrow by the structure you want to filter. For example, to view visits within a specified council, click the down arrow and select the district to view. Additionally, select a commissioner, when available, and a unit. To search for a specific unit, click <b>Search</b> to the right of the <b>Unit</b> field, and enter the requested unit information in the Search Units window.</li> </ol> <p><b>Note:</b> These selections are based on your role. For example, if you are a district commissioner, you can select from the district assigned to you in the District filter. Then you could also narrow the results to specific units. Other options may not be available to you. You can view <b>ONLY</b> items within your role structure. If you have more than one role, such as for both the council and in a district, your view will change based on the Role Selection made.</p> <ol style="list-style-type: none"> <li>3. Select a <b>From</b> and <b>To</b> date to narrow your search to those visits falling within the date range selected.</li> <li>4. Select your filters and click <b>Submit</b>. Scroll down the page to view the visits within the filters you have set.</li> </ol>
	<p>Print information on the Visits page. <i>To print a PDF file:</i></p> <ol style="list-style-type: none"> <li>1. Click the print icon. </li> </ol> <p><b>Note:</b> Based on your role selection you can filter the visits date from the structure options available. For example, select a district to print unit visit information for units only within that district. Or, make no selection</p>

to print all visits.

2. Click **Print Preview**. The Adobe PDF file opens.



3. Click the print icon on the tool bar. Alternatively, you can save the file to your hard drive.

4. Click **OK**. The report is sent to your default printer.


**Note:** Your visit comments are not included in the report. Yes or No with the Comment column signifies whether or not comments were entered.

**Comments**

General: Yes  
 Visit: No  
 Unit: No  
 Administrative: No



Export information on the Visits page. *To export a visits list:*


1. Click the Export Visits Lists icon. 
2. From the Column Selection window, check those column headings you want to appear on the report. Visit date, visit type, visit description, and unit type/number are included in all reports.
3. From **Export Type**, select a report format. You can export the file in .csv (comma-separated value) or .xls (MS Excel) format. *What is a .csv file?*

A comma-separated values (CSV) file is a simple text format for a database table. Each record in the table is one line of the text file. Each field value of a record is separated from the next with a comma.

CSV is a simple file format that is widely supported, so it is often used to move tabular data between different computer programs that support the format. For example, a CSV file might be used to transfer information from a database program to a spreadsheet.

4. Click **Submit**.
5. From the File Download window, click **Save** to save the file to your PC.
6. Navigate to the folder where you want to save the

file.

7. From **File Name**, enter the file name. Include the default extension in the file name.
8. Click **Save** to save the file to the location you selected.
9. Click the Close icon to close the report window. 

**Note:** Only the most recent of each type of comment is included in your report.





Export information on the Visits page. *To export a visit summary:*

#### **About the summary report**

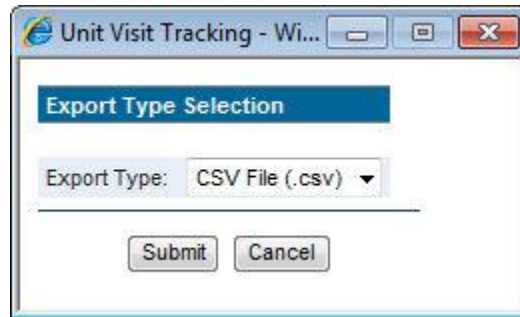
This summary report includes all registered units within the organization structure for the commissioner's role you select. Each unit appears along with the total number of unit visit reports entered for that unit. If no visit reports were entered the value 0 (zero) appears. Sort the results to determine the number of reports entered for each unit and to identify those with no recorded visit reports.


#### **To export a visit summary report:**

1. From the Visits page, click the Filter icon. 
2. Click the Export Visits Summary icon. 
3. From **Export Type**, select a report format. You can export the file in .csv (comma-separated value) or .xls (MS Excel) format. *What is a .csv file?*

A comma-separated values (CSV) file is a simple text format for a database table. Each record in the table is one line of the text file. Each field value of a record is separated from the next with a comma.

CSV is a simple file format that is widely supported, so it is often used to move tabular data between different computer programs that support the format. For example, a CSV file might be used to transfer information from a database program to a spreadsheet.



4. Click **Submit**.
5. From the File Download window, select **Save** and navigate to the folder where you will save the report.
6. Click **Save**. The report is now saved to the folder you selected.
7. Click the Close icon to close the report window. 

## **Adding and editing visits**

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To learn how to add and edit visits, read:

- [Adding Visits](#)
- [Editing a Visit](#)



## Adding a visit

Commissioners can add visit information about the units within the council organizational structure to which they are assigned. **You can edit only the visits you enter.** If you serve in more than one commissioner roles, select the role you want to use on the Visits Management page.


You can add a visit from two locations within Unit Visit Tracking.

- From the home page, scroll to the bottom of the Recent Visits frame and click Add Visit.
- From the Visits Management page, click **Add Visit**.

### To add a visit:

1. Scroll to the bottom of the Unit Visit Tracking home page, and click **Add Visit**. Some of the information might be auto-filled, depending on your role. If you are a unit commissioner, the region, area, council, and district information is auto-filled. When editing a report, the unit information is auto-filled, too.
2. From **Unit**, select a unit.

**Note:** If there are no selections on the Unit menu, click **Search** to search for a unit. From the Search Units window, enter one of the three criteria (Unit Type, Unit Number, or Unit Charter). Then, click **Search**. From the results list, click the unit number. This unit now appears in the Unit field.

3. From Type of Visit, click the down arrow and select a visit type. This is a required field.
4. From Description, enter a description of your visit.
5. Click the calendar icon and select the date of the visit. Click [here](#) to see the calendar icon.
  - a. 
6. From **Number of Youth**, enter the number of youth present at the visit. Then, from **Number of Adults**, enter the number of adults present at the visit.

**Important:** Youth and adults present are validated against Scouting guidelines. If no one was present, enter a zero. Do not leave these fields blank.

If...	Then...
The visit type is unit activity or	enter the number for youth and adults.

unit meeting,	
The visit type is a leader meeting,	enter the number for adults present, and enter zero (0) for number of youth.
The visit type is other,	enter zero (0) if no adults or youth were present.

- Click **Save**. You receive this confirmation message: Visit successfully saved. The Quality Indicators and Comments tabs are now active.
- Click **Quality Indicators**. For each quality indicator, select **Yes**, **No**, or **None**. Then, click **Save**. You receive this confirmation message: Quality Indicators successfully saved. *What are quality indicators?*

## Quality Indicators

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Quality indicators are observations that measure the quality of visits and the level of engagement.

Quality Indicator	Definition
Planning	Did the observed program reflect prior planning and adequate preparation?
Program	Was the observed activity appropriate to the stated advancement and program objectives for this unit?
Leadership	Was adult (and age-appropriate youth) leadership present during this activity?
Tone	Did the Scouts appear to enjoy and be engaged with the program activity?
Attendance	Was actual attendance at this activity at or near the number of enrolled youth?

- Click **Comments**. Click **Visit** or **Unit** for comments related to the visit or the unit. Click **General** to enter a general comment. You can enter up to 255 characters.
- Click **Save**. You receive this confirmation: Comments successfully saved. Your comments appear below the Comments window. Click the date link to edit the comments of the delete icon (red X) to delete the comment. *Click here to see the delete icon.*





## Editing a visit

You can edit a visit from two UVTS locations. Both selections open the Visit Management page where you can view and update a visit.

- From the home page, click the date link for the visit you want to edit.
- From the Visits Management page, click the Visit Date link for the visit you want to edit.

**Note:** Only the original author of a unit visit report can edit visit information.

1. From the **Visits** tab, make changes, as needed. Then, click **Save**.
2. Click **Quality Indicator** and update your selections, as needed. Then, click **Save**.
3. Click **Comments** and then click the Date link to update the comments for this visit. Then, click **Save**. Alternatively, click the delete icon delete the comment. [Click here to see the delete icon.](#)



**Note:** An administrative commissioner, such as the council or district commissioner and assistants, can add administrative comments to any unit visit report entered for a unit within the organization level to which the commissioner is assigned.

### *What is an administrative commissioner?*

An administrative commissioner is an active member registered in at least one of these positions:

Council Commissioner (15)

Assistant Council Commissioner (16)

District Commissioner (81)

Assistant District Commissioner (82)

Roundtable Commissioner (83)

Roundtable Staff (84)



# Focus Management



## Adding a focus

A focus is a note or comment you can add to the unit visit record to help you in your ongoing planning, such as reminders, notes about upcoming visits, etc. Commissioners can view, add, edit, or delete a focus they created.

### To add a focus:

1. Click **Add Focus**. You can add a focus from the home page or the Focus page.
2. Click the calendar icon next to the **From** field to select a starting date for this task. [Click here to see the calendar icon.](#)



3. From **To**, click the calendar icon to select an end date for this task.
4. Enter your notes and comments in the **Focus** window. You can enter up to 255 characters.
5. Click **Save**. Your new focus appears at the bottom of the Focus page, including the date range and a preview of the notes you entered.

### To view focus items:

From the Focus page, click the **View** next to the focus you want to view. The record you selected opens. From here you can view and edit the focus you opened, or you can add a new focus.

You can see only those focus items you created. You can edit or delete an item using the buttons on the left. On the Home page, the five most recent focus entries are displayed with a link to the Focus page.

### To delete a focus:

1. From the bottom of the Focus page, click the delete icon to delete a focus. [Click here to see the delete icon.](#)



2. You receive this confirmation message: Are you sure you want to delete this record?
3. Click **Yes** to delete or **Cancel** to close the confirmation window.
4. The focus no longer appears at the bottom of the Focus page.