

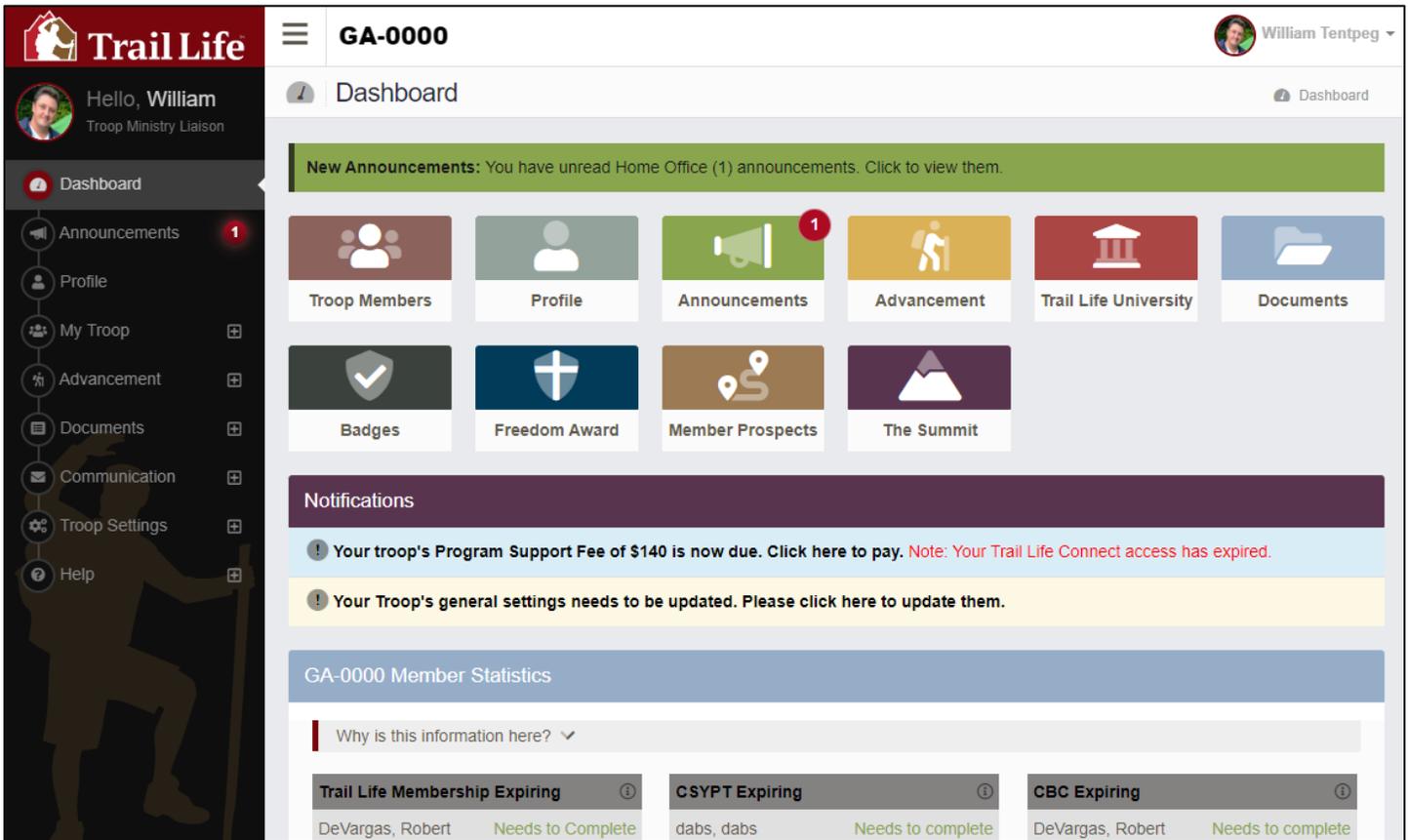
Trail Life Connect Features Overview

This document provides an overview of some of the primary menu items and features contained within Trail Life Connect.

*For purposes of this document, many of the displayed views are that of the Troop Ministry Liaison (TML.) This role within the Troop contains all of the Troop-level permissions by default. Depending on your role(s), your view may be somewhat different. If you see something you believe you should have access to, please check with your TML regarding the role(s) assigned to you. The TML may determine whether to assign a different role and/or whether the situation requires creation of a custom Troop role.

Multiple Roles?

If you have multiple roles, your options may look somewhat different depending on which role you are currently using. To determine the role you are currently using, look to the upper left of the Trail Life Connect window where your current role in the system displays along with your name and profile picture. (See **Figure 1a** below.)



The screenshot shows the Trail Life Connect dashboard for Troop GA-0000, accessed by William Tentpeg, Troop Ministry Liaison. The interface includes a sidebar menu with options like Dashboard, Announcements, Profile, My Troop, Advancement, Documents, Communication, Troop Settings, and Help. The main dashboard area features a 'New Announcements' banner, a grid of feature tiles (Troop Members, Profile, Announcements, Advancement, Trail Life University, Documents, Badges, Freedom Award, Member Prospects, The Summit), a 'Notifications' section with two alerts about a \$140 support fee and general settings updates, and a 'GA-0000 Member Statistics' section with a dropdown menu and three expiring membership categories: Trail Life Membership Expiring, CSYPT Expiring, and CBC Expiring, each with a list of members and their status.

Figure 1a

To switch roles, click the drop-down arrow by your name in the upper right corner and choose the alternate role you would like to switch to. (See **Figure 1b** below.)

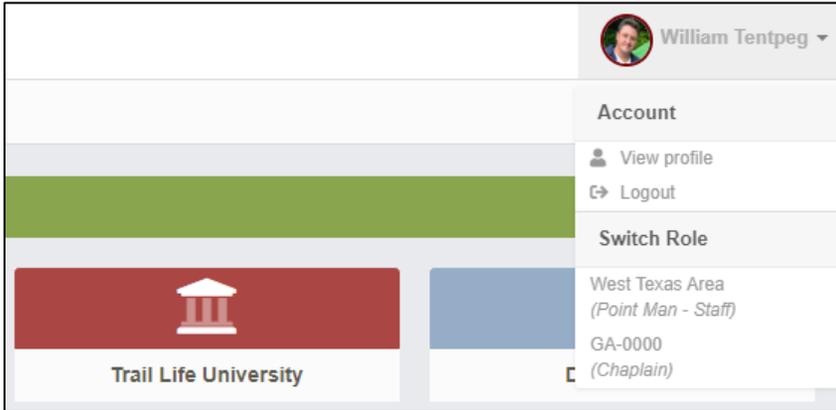


Figure 1b

Again, your role will determine what you see. (See **Figure 1a** above and **Figure 1c** below to compare the differences in the Dashboard view between a TML and a Parent/Guardian.)

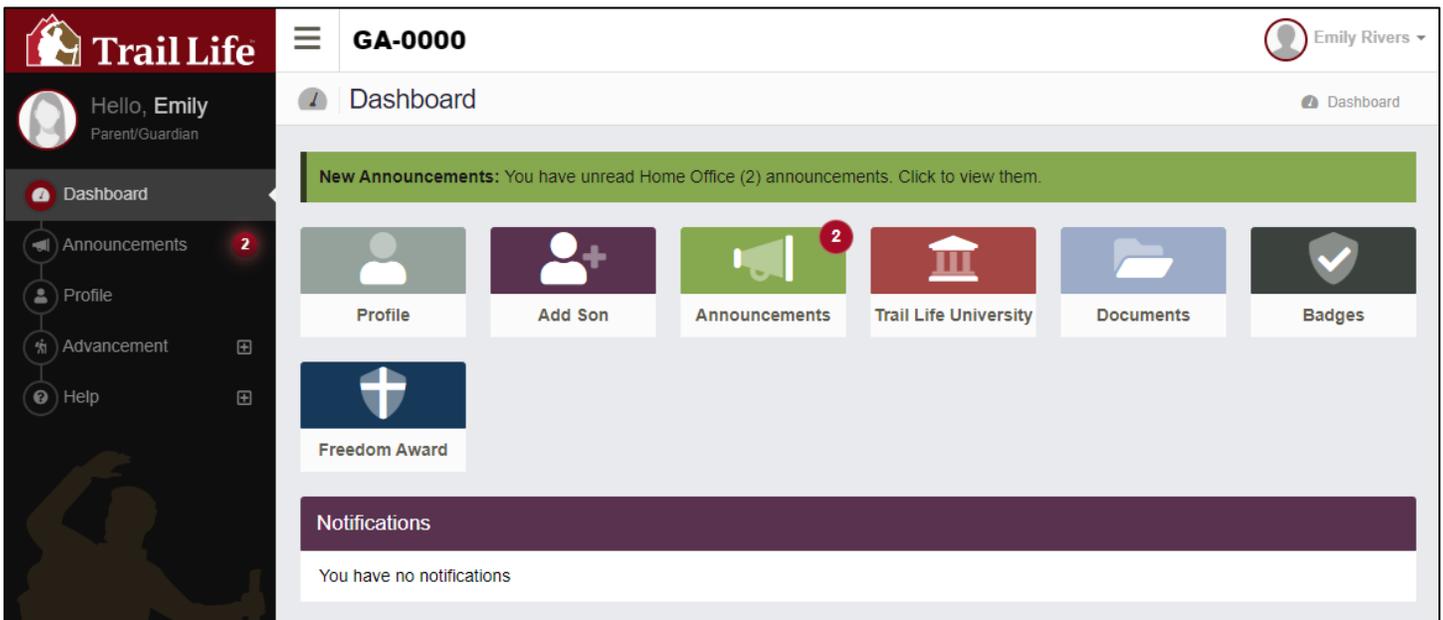


Figure 1c

Notifications

The Notifications section of the Dashboard is a space for messages or actions that are specific to you and/or your family. Items that appear will go away once the requested action is taken. (See **Figure 1a** or **1c**.)

Troop Member Statistics

This section of the Dashboard displays the Membership status of anyone in your Troop who has either not yet completed membership requirements, are soon to expire on one of the membership requirements, or who is already expired on a specific membership requirement. For youth, this will only show new/expiring/expired membership payments. For Registered Adults, it will additionally show new/expiring/expired youth Protection Training and Criminal Background Checks. There is a drop-down menu detailing why the information is displayed as it is on the Dashboard. Additionally, for the TML and some other Troop Leaders, a few graphical components are displayed, including the Charter Expiration date and who is the Troop's Area Point Man. (See **Figure 1d** below.)

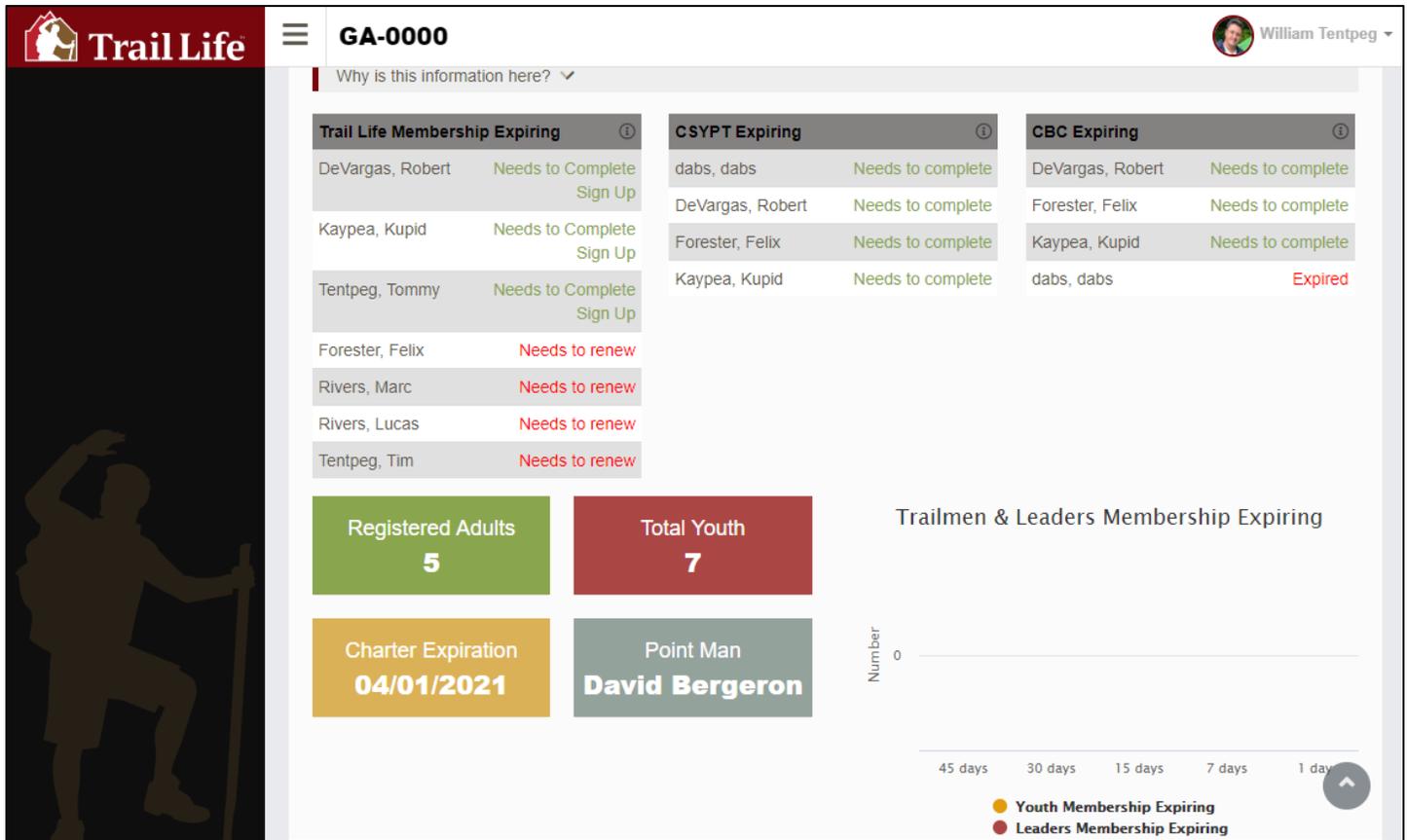


Figure 1d

Troop Members

The *Troop Members* link (if available to your role) will take you to the list of all the members in your Troop. You can locate specific members by using the search and filter options along the top of the list, and can click many of the column headers to sort the list alphabetically or numerically by that column's filter. Additional controls in the upper right, above the list, allow for (1) displaying all Troop members on one page (if your Troop contains more than 25 members,) (2) resetting any filters used, (3) exporting the Troop member list to Excel or CSV files, and (4) executing bulk member actions to change Level, Patrol, and/or Grade for multiple individuals at the same time. (See **Figure 1e** below.)

Trail Life GA-0000 William Tentpeg

Hello, William
Troop Ministry Liaison

Troop Members

Showing 1-18 of 18 items.

Name	Youth	Role	Current Level	Patrol	Birthdate	Age	Grade	View
Aiken, Campy	✓	Trailman	Adventurer	Avengers	11/15/2004	15		
Bacon, Seymour		Senior Ministry Leader		Old Goats				
dabs, dabs		Pending Registered Adult						
DeVargas, Robert		Pending Registered Adult						
Forester, Felix		Pending Registered Adult		Avengers				
Forester, Finn	✓	Trailman	Navigator	King Kong	04/01/2004	16		
Forester, Freddy	✓	Trailman	Fox	Banana	10/27/2008	11		
Forester, Glen		Treasurer						

Figure 1e

Profile

Your Profile contains all the information about you and your Household. The Profile page includes the options for adding sons, a tab for Trail Life University, and tabs for Troop Documents and other Resources. Within your profile, if any of your sons are expired or expiring soon, you can click the red text by their names which results in a portal for completing their membership renewal. (See **Figure 1f** below.)

*In addition to a Trailman's parent/guardian, the other standard Troop roles who can access profile information are: The Troop Ministry Liaison (TML), Troopmaster, and Committee Chairperson.

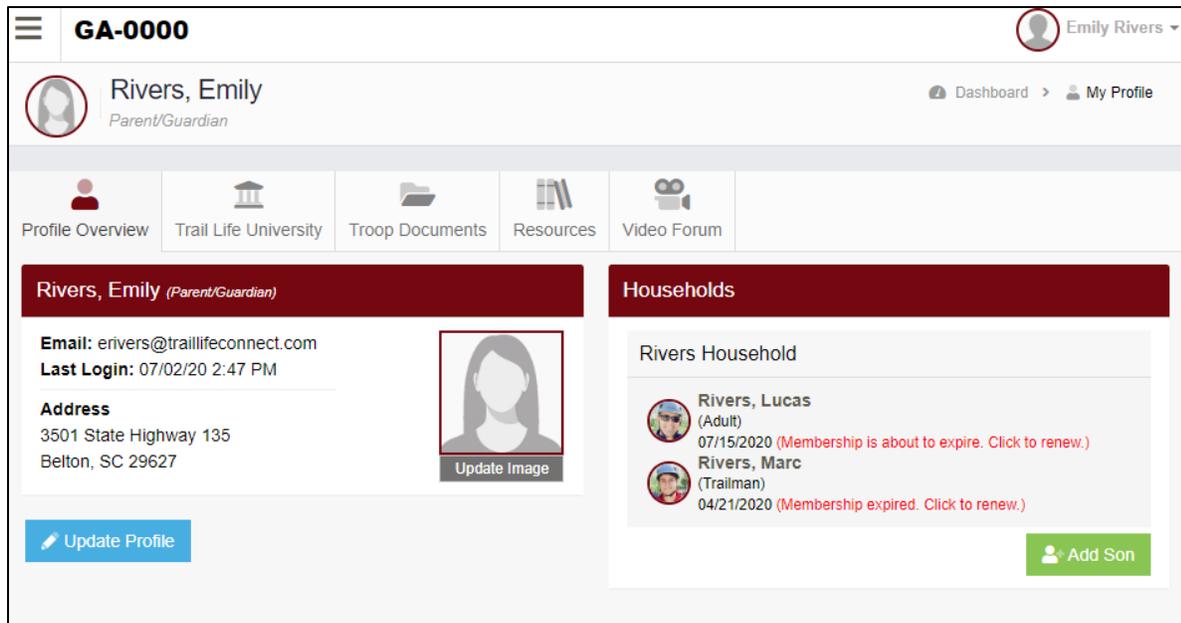


Figure 1f

You can also click a Trailman’s name to view his profile, and update the profile if needed. His ID Card can be printed if his membership is current, and any earned ranks and awards will display. (See **Figure 1g** below.)

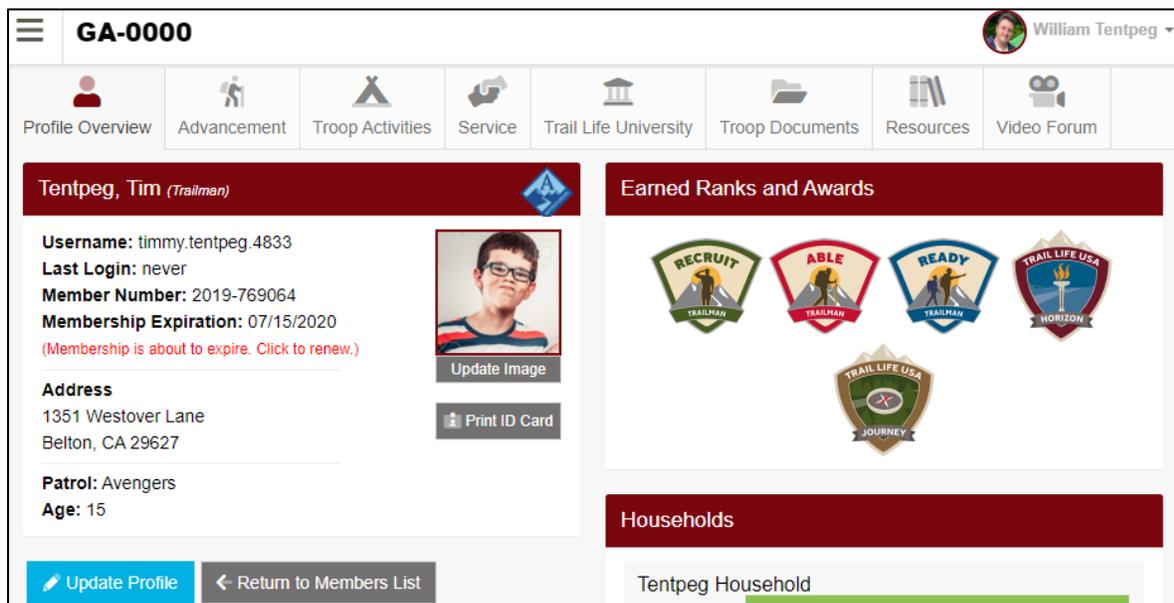


Figure 1g

Clicking the Advancement tab of the Trailman's profile will reveal further information regarding his advancement progress. (See **Figure 1h** below.)

GA-0000 William Tentpeg

Tentpeg, Tim
Adventurer

Dashboard > Troop Members > User Profile

Profile Overview Advancement Troop Activities Service Trail Life University Troop Documents Resources Video Forum

Showing 1-12 of 12 items.

Program	Awards Title	Progress	Completed On
▶ Navigators	Recruit Trailman Rank (2013)	100%	07/22/2019
▶ Navigators	Able Trailman Rank	100%	12/13/2018
▶ Navigators	Ready Trailman Rank (2013)	100%	07/22/2019
▶ Navigators	Trail Skills (2013)	100%	08/22/2019

Figure 1h

If you are a Registered Adult member, you will be able to print your ID Card using the link under your profile picture. (*ID Card printing is only available for Registered Adults whose membership requirements are current.) Registered Adult Members will also be able to add other parents/guardians to the Household, and will have expanded content within Trail Life University. (See **Figure 1i** below.)

Profile Overview Trail Life University Troop Documents Resources Video Forum

Rivers, Lucas (Troopmaster, Committee Chairperson, Chaplain (GA-0000), Power User)

Email: dabtesttm@trailifeconnect.com
Last Login: 07/02/20 2:56 PM
Member Number: 2019-507630
Membership Expiration: 07/15/2020 (Membership is about to expire. Click to renew.)

CSYPT Taken On: 07/05/2020
Background Check On: 07/24/2019

Address
3501 State Highway 135
Belton, SC 29627
(888) 401-4561

Update Image
Print ID Card

Update Profile < Return to Members List

Households

Rivers Household

Add New Parent / Guardian to Household

Rivers, Emily (Adult)
Rivers, Marc (Trailman) 04/21/2020 (Membership expired. Click to renew.)

Add Son

Member Tools

There are no actions currently available for your role to do for this user.

Figure 1i

Finally, the TML has permissions to perform other Member functions within each Troop member Profile, under the *Member Tools* section: Adding/Removing Roles, Re-assigning Household (if a Troop member is not appearing in the correct Household,) Re-sending requests for Leader Registration, and Deactivating Members. (See **Figure 1j** below.)



Figure 1j

Announcements

Clicking the link for Announcements (See **Figure 1a or 1c**), will take you to the Announcements page, where Troop, Area, Regional, and Home Office announcements will be displayed. Look for the Announcements video in the Help Videos section under the Help menu in Trail Life Connect for more information on how this section works.

Add Adults / Initiate Leaders / Transfer Members

Under “My Troop” on the left menu, there are options available to certain Troop leaders for (1) adding a new adult to your Troop, (2) initiating adult leader registrations, and (3) transferring members from other Troops. For adding new adults, there is a video tutorial in the Help Videos section of the Help menu that walks through the 3 options for adding new adults to your Troop. Once an adult is listed within your Troop as a Parent/Guardian, you can also initiate a leader registration, which will send them an email invitation to become a Registered Adult. (Registered Adults pay the annual membership fee, must complete Child Safety Youth Protection Training, and must also submit an application for a Criminal Background Check. Having adults register provides an extra level of protection and opens up more Troop leadership opportunities. Registered Adults count towards the adherence to two-deep leadership.) Finally, for those with permissions, you can also add members by transferring them from other Troops. If a family is moving to your area, or is seeking an alternate Troop within their area, the Troop leaders can transfer them in. The transfer must always be performed by the receiving Troop. Fill in the requested information, and then send the transfer request to the member for their acceptance. (See *these options shown under My Troop on the left menu in Figure 1e.*)

Advancement

This section is where advancement tracking occurs for the youth Trailmen as they move through the program. There are help videos under the Help menu that go deeper into recording Advancement. (See **Figure 1a**, showing menu and icon links.)

Documents

Manage Documents (left menu) is where those with permissions can upload Troop-specific documents for Troop members to access. Document uploads contain options to allow control over who sees the document within the Troop. Resources contains all of the official documents provided by the Home Office that detail various aspects of Trail Life USA, Troop management, and program specific information. (See **Figure 1a.**)

Communication

The two communication options on the left menu are to: (1) Email Members and (2) Update Announcements. Additional videos on the Help menu go into greater detail on both of these communication options. (See **Figure 1a.**)

Troop Settings

Many of the options here (on the left menu) are specific to the TML, as well as a few other Troop leaders with specified permissions.

General Settings are where to set the address of your meeting location, provide a Troop Overview, specify meeting days & times (and whether to display that publicly,) and specifying the primary Troop Support Contact as well as Find a Troop Contacts (for interacting with Member Prospects.)

User Role Permissions show details regarding standard, national roles and also provides the TML with the ability to add a custom Troop-level role with custom permissions that can be assigned to any registered adult within the Troop.

Update Periods is an optional setting, and if used can be applied to Documents or Announcements in specifying the period for which those items will display.

Update Categories is useful to establish as your Troop's document library grows, and provides a way to sort and filter certain documents based on their category.

Update Patrols allows you to provide the names of the Patrols your Troop will use to group your Trailmen within at each level of the program.

Update Email Templates allows you to create custom templates that can be used when sending emails, either through the Email tool or when emailing prospects through the Member Prospects tool.

(See **Figure 1k** below for these menu options.)

Help Menu

The Help menu (on the left) contains help videos and help documents as well as links for contacting your Troop leaders, Area Point Man, or Trail Life Connect support. Additionally, there are links to other resources, such as the Trail Life USA Store, Events, and Branding information. (See **Figure 1l** below for these menu options.)

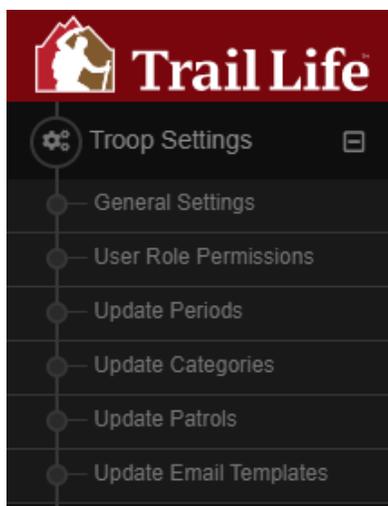


Figure 1k

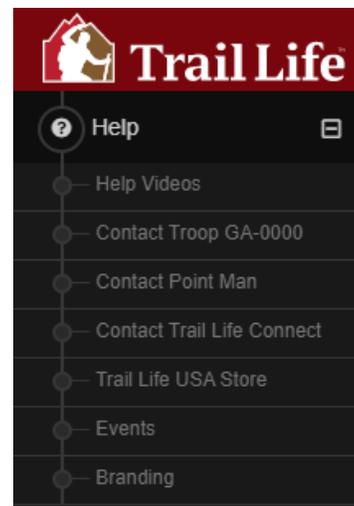
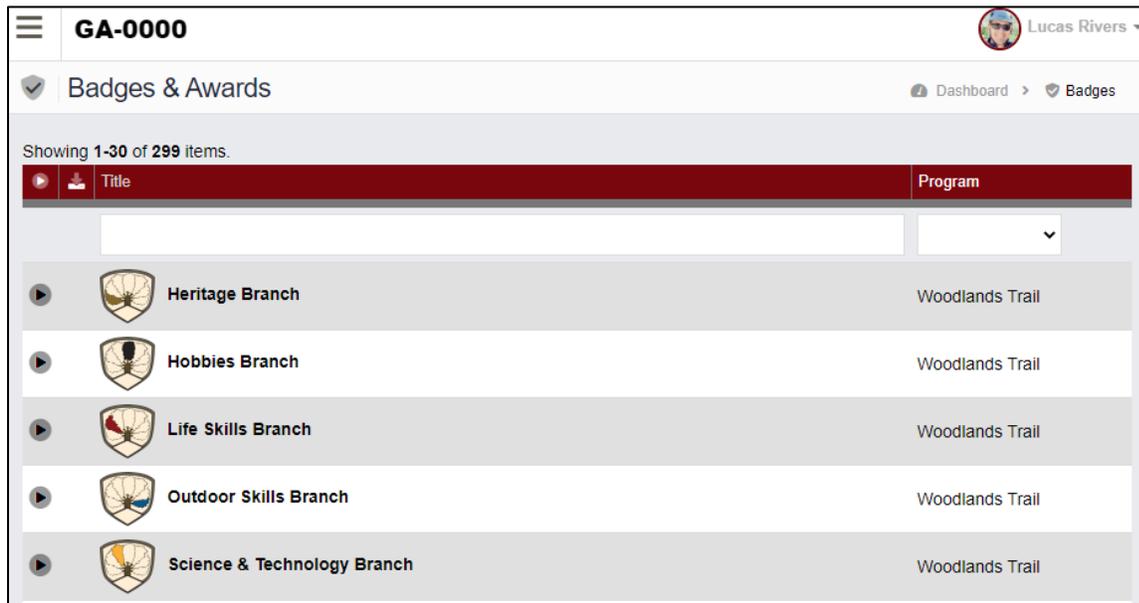


Figure 1l

Other Dashboard Icons/Tiles/Links

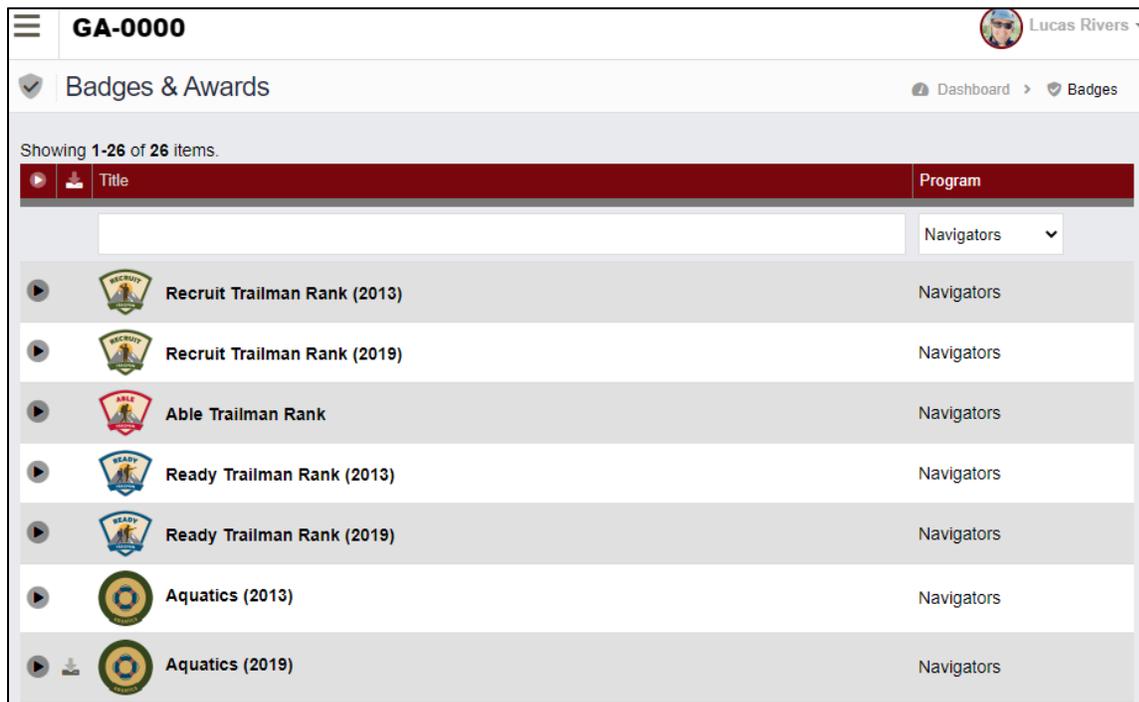
The remaining items available to click on the Dashboard are summarized below:

Badges will take you to the Badges & Awards page, which contains information about what is required to earn ranks and trail badges. All badges and awards are displayed. (See **Figure 1m.**) You can search by the badge or award Title, and can also filter the list by a specific Program. (See **Figure 1n.**) Expanding the item provides further info, and there are also download links (where applicable) for downloading a PDF version of the requirements. (See **Figure 1o.**)



GA-0000		Lucas Rivers
Badges & Awards		Dashboard > Badges
Showing 1-30 of 299 items.		
	Title	Program
	Heritage Branch	Woodlands Trail
	Hobbies Branch	Woodlands Trail
	Life Skills Branch	Woodlands Trail
	Outdoor Skills Branch	Woodlands Trail
	Science & Technology Branch	Woodlands Trail

Figure 1m



GA-0000		Lucas Rivers
Badges & Awards		Dashboard > Badges
Showing 1-26 of 26 items.		
	Title	Program
	Recruit Trailman Rank (2013)	Navigators
	Recruit Trailman Rank (2019)	Navigators
	Able Trailman Rank	Navigators
	Ready Trailman Rank (2013)	Navigators
	Ready Trailman Rank (2019)	Navigators
	Aquatics (2013)	Navigators
	Aquatics (2019)	Navigators

Figure 1n

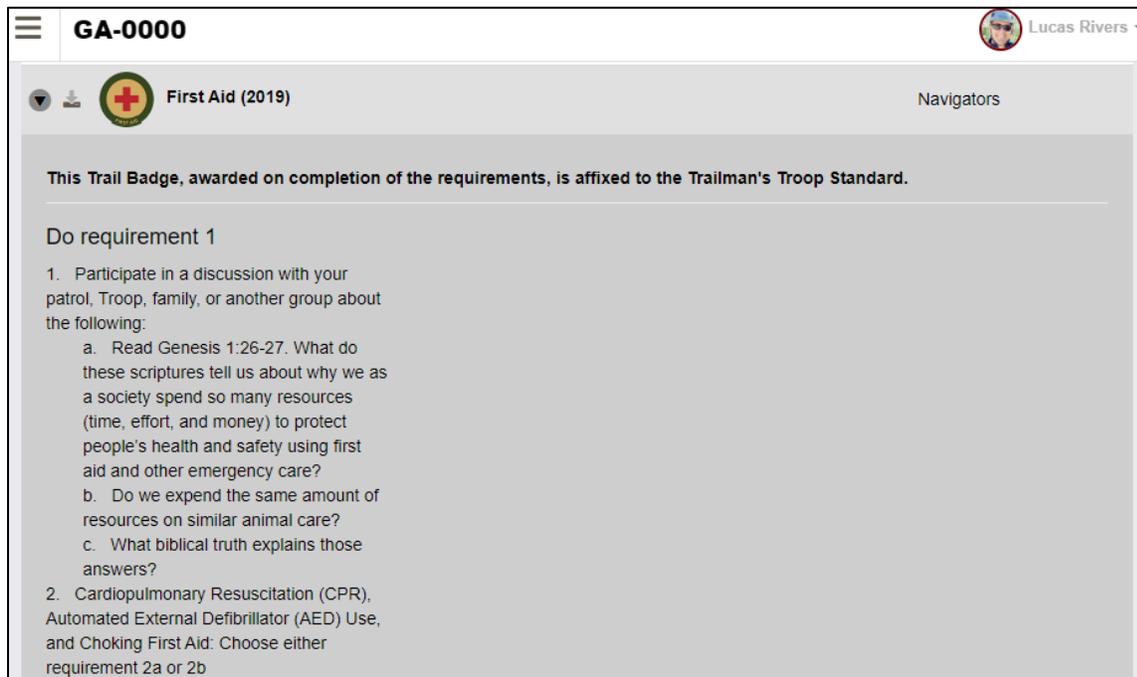


Figure 1o

Freedom Award will bring you to a page containing more information about Trail Life USA's Freedom Award including detailed guides for each path to Freedom. (See link in **Figure 1a** or **Figure 1c**.)

Member Prospects will only be available to registered leaders whose roles have the necessary permissions to view and interact with prospective Troop Members. Additional videos under the Help menu go into greater detail on both the Find-A-Troop map (used by prospects) and the Member Prospects tool for use by Troop leaders. (See link in **Figure 1a**.)

The Summit will only be available to registered adult members in the Troop. Clicking the icon for The Summit will take you to a page where online, interactive events are announced and members can click to register to attend those events when they occur. (See link in **Figure 1a**.)