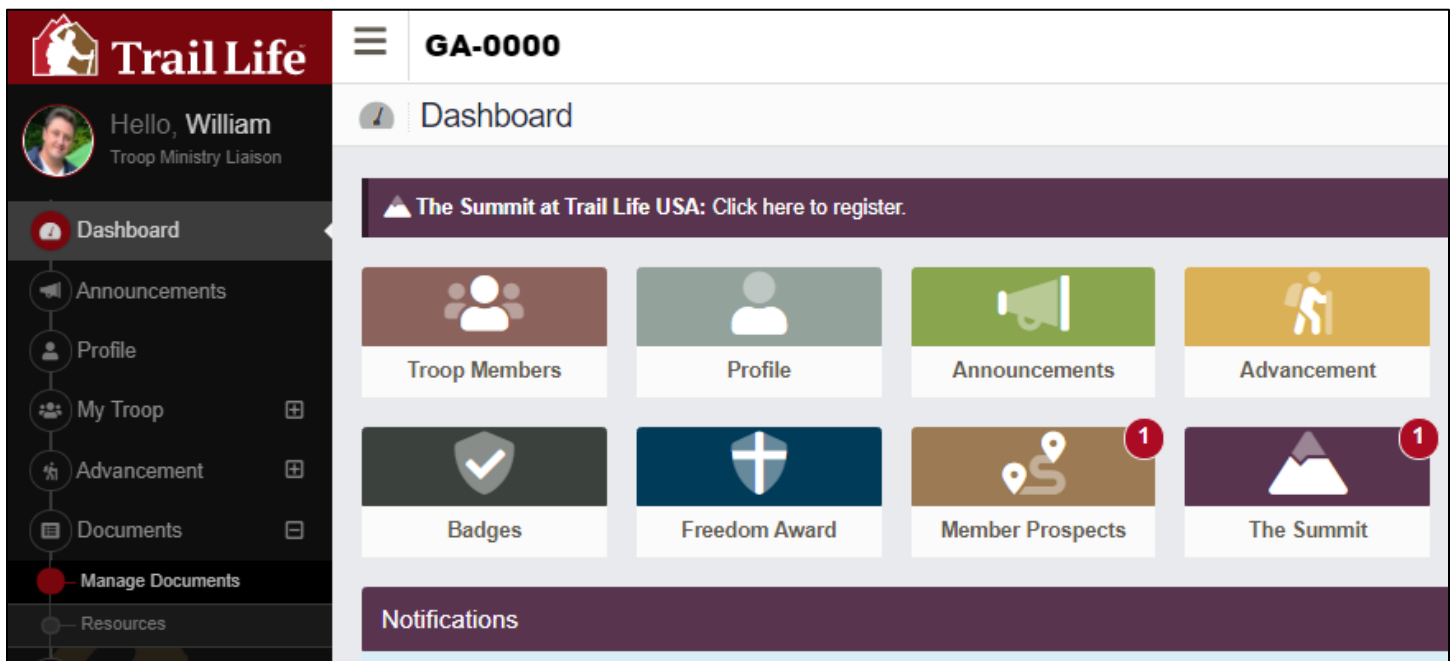


## Troop Documents

This Help document provides details of the views and functions of the Documents section within a Troop. Views shown will be from the perspective of the Troop Ministry Liaison, who possesses the highest permission level within a Troop.

### Adding New Troop Documents

To add a new document, expand “Documents” on the left menu, and then select “Manage Documents.”



On the *Manage Uploaded Documents* page, click the **Add New Static Document** button to upload a new document.

[+ Add New Static Document](#)

On the *Create Static Document* screen, there are several options. Provide a Title for the document and specify what starting date it should begin publishing (or begin being available to access.) If the document is only relevant for a specified time period, you can also include a date to end publishing (the document will no longer appear in Troop member portfolios.) Upload your file by ‘drag & drop’ or through selecting a file by searching the local computer. You will then specify in which member portfolios the document will appear (i.e. the ‘Documents’ tab in their profile) as well as other members who can view the document with a valid link.

(View rights can be assigned by role, levels or patrols, or by selecting specific members.) Finally, you can decide whether the document can be accessed and downloaded publicly (accessible without requiring a valid login to Trail Life Connect.)

**Trail Life** GA-0000 William Tentpeg

Hello, William  
Troop Ministry Liaison

Dashboard > Create Static Document

### Create Static Document

#### Document Setup

Title \*

Description

Active \*  Yes

Archive this document  No

Category No category specified.

Tags Add tags to better identify this document.

Publish Start Date  Start date unspecified.

Publish End Date  End date unspecified.

#### File Upload \*

Select or drag & drop file here.

Select file ...

Max size 32MB

#### Who can **view** the uploaded document?

All roles

Specific role No roles specified.

All levels or patrols

Specific levels or patrols No levels or patrols specified.

Specific members No users specified.

#### Can the document be downloaded by the **general public**?

Note: Most of your documents should be made available only to registered members of your Troop and you should not check the box below. By selecting the option below, you will make the document available to anyone who is not logged into Trail Life Connect when they click on the document link.

Document is publicly accessible

+ Create <- Return to document list

When all of the items are correct, press the **Create** button to upload the document.

The *Manage Uploaded Documents* page displays a list of the uploaded documents for the Troop.

The screenshot shows the 'Manage Uploaded Documents' interface for Troop GA-0000. The user is William Tentpeg. The page displays a table of 12 items (showing 1-12). The table has the following columns: Title, Document Type, Category, Submitted by, Created At, Active, Archived, Document Visible, Publicly Accessible, and Menu. The data rows are:

Title	Document Type	Category	Submitted by	Created At	Active	Archived	Document Visible	Publicly Accessible	Menu
TLC Calendar Overview.pdf	Attachments	Parents	Tentpeg, William	11/17/20 12:50 PM	Yes	No	Yes	No	Download/Share
TLC Q&A	Standard Documents	Administration	Tentpeg, William	11/03/20 12:20 PM	Yes	No	Yes	No	Download/Share
Campout Packing list	Standard Documents	Camping	Tentpeg, William	07/26/19 1:51 PM	Yes	No	Yes	No	Download/Share

As the document list grows, you can utilize the column filters to search for specific documents for which you need to review or make any changes.

### Edit an Existing Document

To edit an existing document, on the *Manage Uploaded Documents* page, click the pencil icon on the far right of the listed document you wish to edit.



The same options will be presented as when you are adding a new document, allowing you to make any adjustments to existing information, wording, or availability of the document.

\*Note: if the document itself needs to be edited, you can make the edits offline to the source document and then upload the newly edited version to the existing listed item. There is no need to delete an incorrect document and make a whole new listing or create a new instance/link. This is especially helpful if you have already sent out and shared a link to this document. If you need to correct an error, or change information within the document itself, you can make the changes on your computer. Then, you can come to the initial document listing in Trail Life Connect, choose to edit the document, and upload the new, corrected version. Everyone who received the link previously can continue to access the document using the same link – however, when they next click the link, they will get the most updated version.

### Expand Document Details

To expand brief, summary details about a document, you can click the expand button listed next to the document title.



The summary details will expand and provide at-a-glance information such as the Document title, the URL link to the document, whether it is currently active, any specific start and end publish dates, and whether it is currently visible to selected users.

Title	Document Type	Period	Category	Submitted by	Created At	Active	Archived	Document Visible	Menu
Campout Packing list	Static	All Periods	All Categories	Tentpeg, William	07/26/19 2:51 PM	✓	✗	✓	
Document Title: <b>Campout Packing list</b> Document Link: <a href="https://www.trailifeconnect.com/getdoc/ecth02xkcei">https://www.trailifeconnect.com/getdoc/ecth02xkcei</a> Active: ✓ Start Publish Date: N/A End Publish Date: Never Currently visible to selected users: ✓									
<a href="#">+ Add New Static Document</a>									

## Download Documents

To download a document within the Trail Life Connect interface, you have one of 3 options:

1. On the *Manage Uploaded Documents* page, click the download link to the right of the listed document.
2. On the *Manage Uploaded Documents* page, expand the document details and click the provided 'Document Link' shown in the summary details.
3. Within your member Profile, navigate to the "Troop Documents" tab and click the download link next to the document you wish to access.



## Viewing and Searching for Troop Documents

When documents are uploaded within a Troop, Troop members will be able to view and access those documents within their member Profile by clicking the tab for "Troop Documents." (This space of the member Profile may also be referred to as the document portfolio.)

GA-0000					William Tentpeg
Tentpeg, William <small>Troop Ministry Liaison, Troopmaster, Chaplain, Registered Adult</small>					<a href="#">Dashboard</a> > <a href="#">Troop Members</a> > <a href="#">User Profile</a>
Profile Overview	Trail Life University	Troop Documents	Resources	Video Forum	
Filter by Tags <input type="text" value="Select tags to further filter the documents."/>					
Showing 1-1 of 1 item.					
Document title & description				Category	Download
Campout Packing list	Be sure to always bring these items with out -basic list			All Categories	

Within the "Troop Documents" (or portfolio) section of the member Profile, you can search and filter the list of documents by using one or more of the 3 optional methods on-screen:

- Search for words in the title or description by typing in the blank space under that column header
- Filter the document list by category, using the drop-down options under that column header
- Filter/search by typing and selecting tags using the field above the list of Troop Documents

\*Note: the "Resources" tab appears next to the "Troop Documents" tab within each member Profile. "Troop Documents" is a listing of documents specific only to your Troop. "Resources" is a listing of documents available to all Troops. The search and filter tools exist within each list as you look for specific items.

## Using Documents in Communications

When using Trail Life Connect communication tools (Email and Announcements) you can include documents by providing the document link within the communication. (By either copying/pasting the entire URL, or by adding the URL to existing text as a hyperlink.) The communication tools also have a button to insert (or attach) a file into the message. However, this functions differently from attachments in other messaging systems. "Attachments" in TLC effectively takes the file you wish to attach and uploads that file to the Troop's Documents library. The "attached" file will need to be checked to ensure the view settings are correct for the intended audience. When viewing the "Manage Documents" page, the listed documents can be differentiated by the 'Document Type' column. Those items that were added as attachments will be labeled with the document type of "Attachments." These attachment type documents will only appear here, and not on the 'Troop Documents' tab within a member's Profile. All other uploaded Troop Documents will be listed with the document type of 'Standard Documents.'