

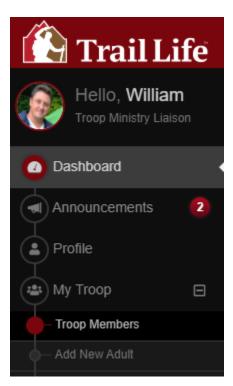
Troop Members – Roster Export

This document provides details around the ability to export the Troop Members roster to either CSV or Excel files. Your particular role will determine whether this function is available to you to use. Also, the information contained in the output file will be dependent upon your role and the data you have access to export using that role. For purposes of this document, we will be showing the report from the perspective of the Troop Ministry Liaison (TML).

First, navigate to your Troop Members list by clicking the Dashboard Tile for "Troop Members" or by clicking the "Troop Members" link under "My Troop" on the left navigation menu. (each option shown below)



OR





In viewing the Troop Members list, you will see the overall snapshot of everyone in your Troop, along with certain key information. Above the list, in the upper right, are additional button controls for: showing all Troop Members on one page, displaying only new members, toggling additional info, resetting filters, exporting to Excel or CSV, and Bulk Member Actions. (*See Figure Ia*.)

🚯 Trail Life	∃ GA-0000								۲	William 1	Tentpeg 👻
👰 Hello, William	Troop Members							Ø Dashb	oard > 🍇	F Troop Me	mbers
Troop Ministry Liaison	Showing 1-25 of 25 items.						⊮ *All	<u>*</u>	C		
Dashboard	▶ <u>Name</u>	Youth Role		—	Current Level	Patrol		Birthdate	Age	Grade	View
Announcements		✓ All Use	Roles 💌	•	All Levels	All Patrols	•				
Profile My Troop	Abernathy, Dave	Troop M	istry Liaison 🏇	-							1
Troop Members	Aiken, Scotty	✓ Trailman			Navigator			04/05/2008	14		1
Add New Adult	Aiken, Campy	✓ Trailman	<u>e</u>	•)	Adventurer	Avengers		11/15/2004	17		

Figure la

Clicking the Call button will display all of your Troop Members on one screen. The default view shows 25 Troop Members at a time, and you may need to click through several pages to see everyone (particularly if you have a larger Troop.) This button puts everyone on one page, so you can scroll up and down to see everyone on one screen.

Clicking the button will change the view to only list member accounts that have been created within the last 30 days. Clicking the button again will revert to the view prior to clicking.

Clicking the button will change/toggle the on-screen view slightly to include other profile information not present in the default view. (i.e. t-shirt size, employment experience, other skills, knowledge, interests, etc.) Clicking the button again will toggle the view back to default.

Clicking the button will reset any filters you currently have in place and put your view back to the default. (i.e. if you were viewing only those at the Navigator level, your display would only show youth Trailmen who are Navigators. Clicking the filter reset button will restore the list to show everyone in the Troop again.)

Clicking the EBB button activates the Bulk Member Actions tool, for making bulk changes to Level, Patrol, or Grade. You can visit the Trail Life Connect Help menu for more information on the Bulk Member Actions tool and how it is used.

Clicking the button will export your Troop Members roster to an Excel file. Clicking the button will export your Troop Members roster to a CSV file. Each export contains the same information, but in different formats depending on your needs.

Note: Different web browsers handle file downloads differently. After clicking either of the export buttons, look for either an on-screen prompt requesting to open or save the file, or for a download status at the bottom of the browser window where you can also click to open or save the exported file.

When exporting the Troop Members list, with all filtering set to the default level, the resulting file will contain the entire listing of Troop Members with some expanded information (in addition to what shows on the screen.) Items in the export include address and phone #, expiration dates for membership, expiration dates for background checks and Youth Protection Training for registered adult leaders, and more.

*If you are using any filters on-screen, the Excel or CSV exports will limit the file output to only show what you are currently filtering. This is important to note if you want to see a report of the entire Troop membership but were using on-screen filtering. Before exporting the list, you would want to click the button to reset filters. Alternatively, if you are not interested in a current output that shows the entire Troop, but wanted to export just the list of Woodlands Trail Trailmen, you could apply that filter on-screen first, then click one of the file export options. Your results, then, would only show the filtered information.

Figure Ib shows an example of an Excel export for the whole Troop. **Figure Ic** shows an example of an Excel export for only the Woodlands Trail Trailmen. Finally, **Figure Id** shows an example of a CSV export for the whole Troop.

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4	2 Bacon	Seymour		N		seymour.bacon@traillifeconnect					Old Goats	
5	3 dabs	dabs		N	Pending Registered Adult	dabtestcor@traillifeconnect.com						
6	4 DeVargas	Robert		N	Pending Registered Adult	robcc@traillifeconnect.com						
7	5 DeVargas	Robert		N	Parent/Guardian	robert@traillifeconnect.com						
8	6 Forester	Felix		N	Pending Registered Adult	fforester@traillifeconnect.com				Adventurer	Avengers	
9	7 Forester	Finn		Y	Trailman	finn.forester.4144			2019-989813	Navigator	King Kong	04,
10	8 Forester	Freddy		Y	Trailman	freddy.forester.2854			2019-271678	Fox	Banana	10,
11	9 Forester	Glen		N	Registered Adult	gforester@traillifeconnect.com			2019-698563			
12	10 Jones	Bob		Y	Trailman	bob.jones.9192	noreply@trailifeusa.com		2020-702886	Fox		10,
13	11 Jones	Jeff		Y	Trailman	jeff.jones.6122	noreply@trailifeusa.com		2020-329633	Adventurer		05,
4	12 Jones	Tom		N	Parent/Guardian	noreply@trailifeusa.com						
15	13 Kaypea	Kupid		N	Pending Registered Adult	dabtestdc2@traillifeconnect.com						
16	14 Rivers	Emily		N	Parent/Guardian	erivers@traillifeconnect.com						
17	15 Rivers	Marcus	Marc	Y	Trailman	marcus.rivers.2345	erivers@traillifeconnect.com	Y	2016-798054	Adventurer	Banana	04/
18	16 Tentpeg	Tammy		N	Pending Registered Adult	ttentpeg@traillifeconnect.com						
19	17 Tentpeg	Timmy	Tim	Y	Trailman	timmy.tentpeg.4833	wmtentpeg@traillifeconnect.com	n	2019-769064	Adventurer	Avengers	03
0	18 Tentpeg	Tom		Y	Trailman	TommyT	noreply@traillifeusa.com		2020-411091	Fox		08
1	19 Tentpeg	Tommy		Y	Trailman	tentpeg007	ttentpeg@traillifeconnect.com		2019-166831	Fox		01
22	20 Tentpeg	Tyler		Y	Trailman	tyler.tentpage.9271			2019-320339	Hawk	Screeching Eagle	le 03,
23	21 Tentpeg	William		N	Pending Registered Adult	wtentpeg@traillifeconnect.com						
24	22 Testo	Charlie	Chucky	Y	Trailman	chuckytesto			2020-508573	Fox		02
5	23 Testo	Roberto		N	Pending Registered Adult	rob@traillifeconnect.com						
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Figure Ib



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Figure Ic

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	8 Forester	Freddy		Y	Trailman	freddy.fo	rester.285	4	2019-271	6 Fox	Banana	*****	ŧ	11	23003 Hunt	ington D	r Belton	SC	29627			
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1	13 Kaypea	Kupid		N	Pending F	dabtestdo	2@traillif	econnect.c	om													
5	14 Rivers	Emily		N	Parent/G	erivers@t	raillifecor	nnect.com							3501 State	Highway	Belton	SC	29627			F
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