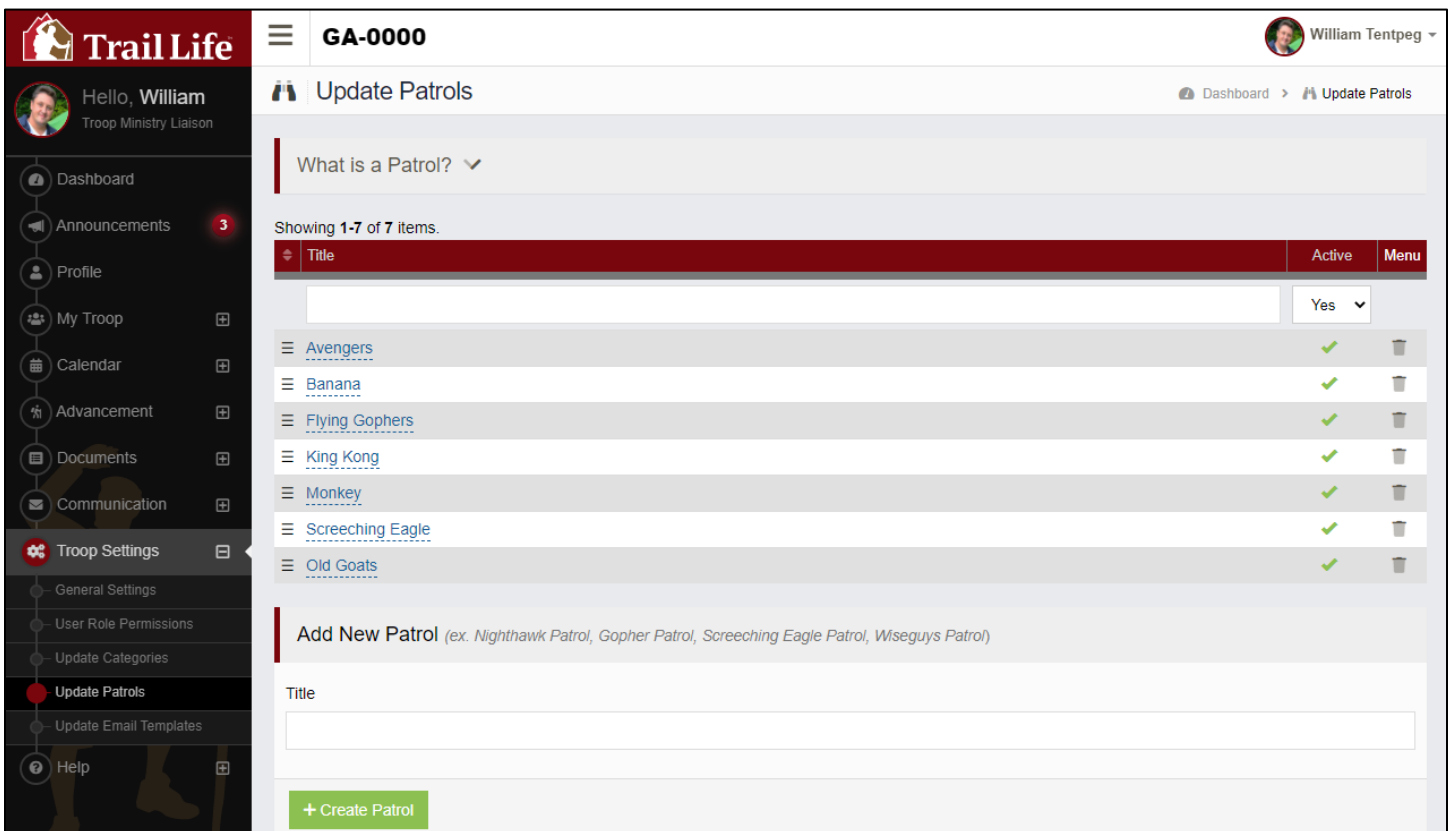


## Updating Patrols in Trail Life Connect

This document covers the usage and management of Patrols within Trail Life Connect. Views shown are from the perspective of the Troop Ministry Liaison

### Adding/Editing Patrol Names

To add or update Patrol names to use within your Troop, you will expand “Troop Settings” on the left menu and then select “Update Patrols.” (The permission to update Patrols is available by default for the TML, Troopmaster, Committee Chairperson, Advancement Chair, and specific program level leaders.)



The screenshot shows the 'Update Patrols' interface for Troop GA-0000. The left sidebar contains a navigation menu with 'Troop Settings' expanded to show 'Update Patrols' as the selected option. The main content area displays a table of existing patrols:

Title	Active	Menu
Avengers	✓	🗑️
Banana	✓	🗑️
Flying Gophers	✓	🗑️
King Kong	✓	🗑️
Monkey	✓	🗑️
Screeching Eagle	✓	🗑️
Old Goats	✓	🗑️

Below the table is a section for 'Add New Patrol' with a text input field for the title and a green '+ Create Patrol' button.

On the 'Update Patrols' page, you will see a list of any existing Patrols. You can re-arrange the order of the Patrols by clicking the 3 bars on the left and dragging to change the row order. You can deactivate a Patrol by clicking the green check to turn it to a red X. If a Patrol is no longer needed, you can delete it by clicking the trash can icon on the far right.

To add a new Patrol name: scroll to the bottom of the page, type in the desired Patrol name in the 'Title' field, and click the "Create Patrol" button. The new Patrol will appear in the list and you can sort it accordingly.

### Patrol Usage

Patrols are essentially used to organize several individuals into one group. The typical implementation of Patrols is for grouping youth Trailmen together into groups within their respective program Levels. The Patrol names can be as simple as the Level name (Fox, Hawk, Mountain Lion, Navigator, Adventurer) or can be creative names the Troop or Patrol leaders decide upon (Mighty Warrior, Screeching Eagle, Banana.) In larger Troops, it will be necessary to have distinct Patrol names to differentiate separate Patrols within a Level (Red Fox, Gray Fox, etc.) If desired, Patrols could also be created and used to group adults within the Troop. \*Note: an individual can only belong to one Patrol and cannot have their account exist within multiple Patrols.

Once established, Patrols can be used in the following ways (depending on your permission level):

- Placing your Trailmen (and possibly adult members) into logical groupings
  - Filtering/sorting/organizing your Troop Members list
  - Email communications, where you can select to send the message to specific Patrols
  - Troop document management, where document viewing can be specified by Patrol
  - Announcements, where messages can be designated to appear to specific Patrols
  - Calendar Events, which can be specified to appear for specific Patrols
- \*Note: for Emails, Announcements, and Calendar Events – if the desire is to target Patrols that are youth specific, the parents will not be able to view the items or RSVP to certain calendar events unless you check the box to "Include adults in household" for these items. Alternatively, if only some parents need view access they can be separately added in the "Specific members" field for Emails and Calendar events.

Who can **view** this event?

All roles

Specific role



All levels or patrols

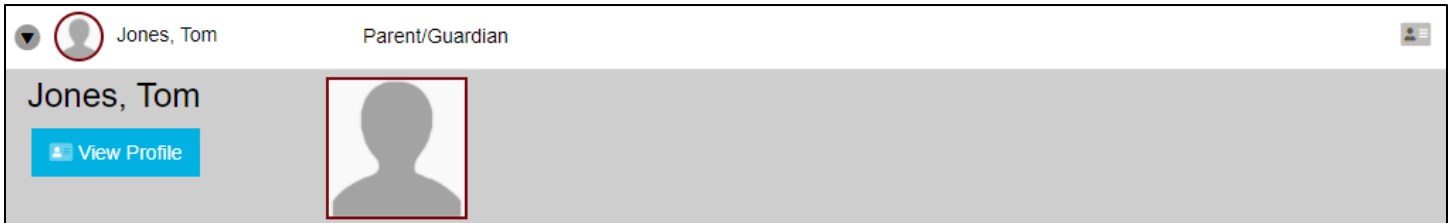
Specific levels or patrols

Include adults in household

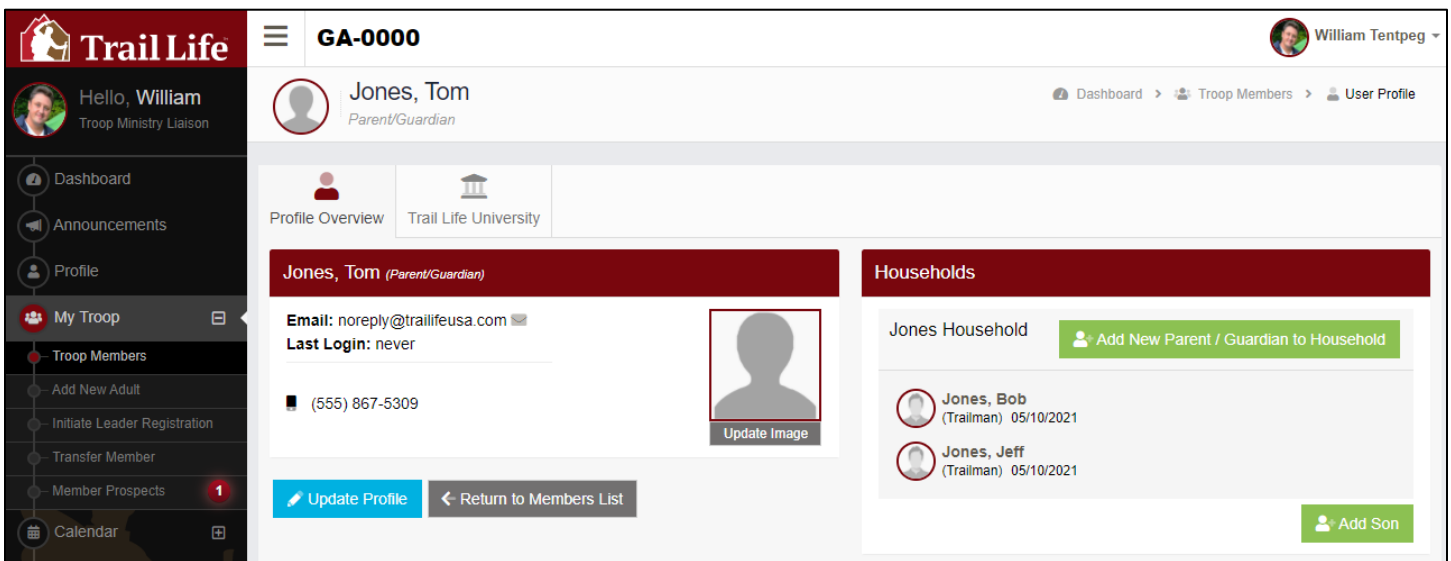
Specific members

## Updating Patrol Assignments

If your role has permissions to update other profiles\* within the Troop, you can navigate to the Troop Members list by expanding "My Troop" on the left menu and clicking "Troop Members." To open a member profile, you can expand the member record by clicking the left  button, then selecting "View Profile." Or you can click the 'View user' card on the right  to view the member profile.




While viewing the member profile, click the "Update Profile" button.

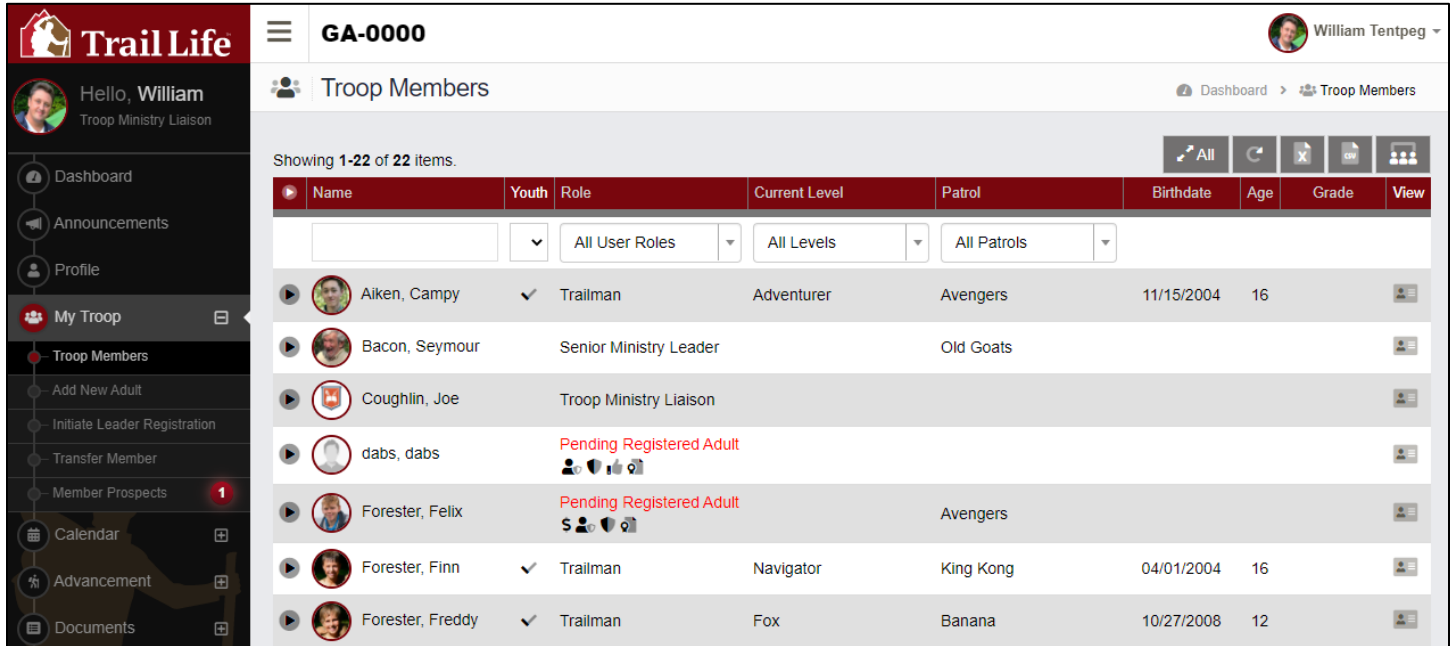


The Patrol selection field is located at the top of the profile information. You can click the drop-down to view the list of Patrols you have specified within your Troop and select a Patrol to assign to the individual as needed.

### Main Profile

Patrol	<input type="text" value="No patrol specified."/> 
First Name *	<input type="text" value="Tom"/>
Middle Name	<input type="text"/>
Last Name *	<input type="text" value="Jones"/>

Once assigned, Patrols will appear for quick viewing, filtering, and sorting on your Troop Members list.



The screenshot shows the Trail Life web interface for Troop GA-0000. The user is William Tentpeg, Troop Ministry Liaison. The main content area displays a list of 22 members, with the first few visible:

Name	Youth	Role	Current Level	Patrol	Birthdate	Age	Grade	View
Aiken, Campy	✓	Trailman	Adventurer	Avengers	11/15/2004	16		
Bacon, Seymour		Senior Ministry Leader		Old Goats				
Coughlin, Joe		Troop Ministry Liaison						
dabs, dabs		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	12		

Another method for updating Patrols is by utilizing the 'Bulk Member Actions' tool, found in the top-right above the Troop Members list.



This tool will allow you to change the Patrol (as well as Level and Grade) for multiple individuals at one time. You can find a tutorial video and corresponding document for specifics regarding Bulk Member actions on the Trail Life Connect Help menu.

\*Standard roles with the ability to update profiles (and thusly, Patrols) are:

- Troop Ministry Liaison (TML)
- Troopmaster
- Committee Chairperson

Updating member profiles can also be accomplished through usage of a custom role, if the TML creates one and provides the appropriate permissions to view and update other member profiles within the Troop.