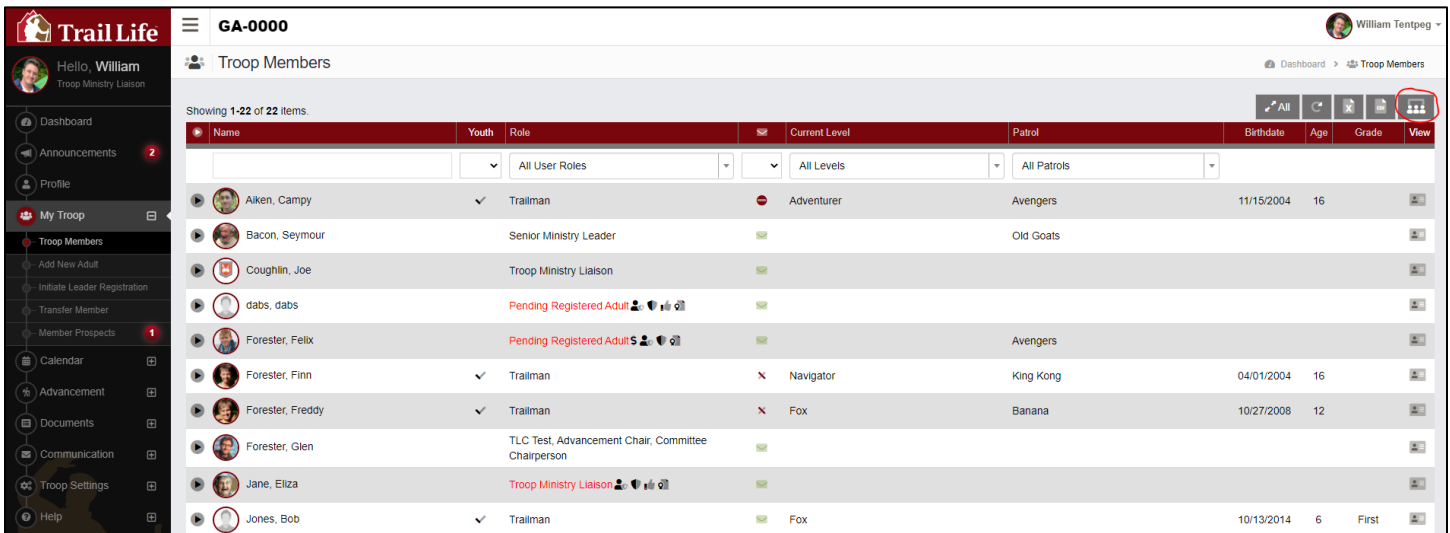


Bulk Member Actions in Trail Life Connect

This document will highlight details and usage of the Bulk Member Actions tool within Trail Life Connect. Any screen shots are shown from the perspective of the Troop Ministry Liaison.

The Bulk Member Actions tool can be used to make changes to Level, Patrol, and/or Grade for multiple individuals at the same time. The tool is primarily relevant for youth Trailmen with respect to Level and Grade, but it could also be used for adult members if Patrols are being utilized for them as well.

Provided your role has the proper permissions, the Bulk Member Actions tool can be found when viewing the overall Troop Members list. The tool can be accessed using the gray button in the upper right, above the member list.



The screenshot shows the Trail Life interface for Troop GA-0000. The user is William Tentpeg, Troop Ministry Liaison. The page displays a list of 22 members. A red circle highlights the Bulk Member Actions button (three people icon) in the top right corner of the member list area.

Name	Youth	Role	Current Level	Patrol	Birthdate	Age	Grade	View
Alken, 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		
Forester, Glen		TLC Test, Advancement Chair, Committee Chairperson						
Jane, Eliza		Troop Ministry Liaison						
Jones, Bob	✓	Trailman	Fox		10/13/2014	6	First	

In a closer zoom to the red, circled area above, the button for Bulk Member Actions looks like this:



Clicking the button retains the overall look of the Troop Members list but adds checkboxes to the right of each listed individual and provides action controls at the bottom of the page. (There is also a drop-down information bar at the top with further information about the tool.)

TrailLife GA-0000 William Tentpeg

Troop Members

Instructions for bulk member actions

Showing 1-22 of 22 items.

Name	Youth	Role	Current Level	Patrol	Birthdate	Age	Grade	View
Aiken, Campy	<input checked="" type="checkbox"/>	Trailman	Adventurer	Avengers	11/15/2004	16		
Bacon, Seymour	<input type="checkbox"/>	Senior Ministry Leader		Old Goats				
Coughlin, Joe	<input type="checkbox"/>	Troop Ministry Liaison						
dabs, dabs	<input type="checkbox"/>	Pending Registered Adult						
Forester, Felix	<input type="checkbox"/>	Pending Registered Adult		Avengers				
Forester, Finn	<input checked="" type="checkbox"/>	Trailman	Navigator	King Kong	04/01/2004	16		
Forester, Freddy	<input checked="" type="checkbox"/>	Trailman	Fox	Banana	10/27/2008	12		
Forester, Glen	<input type="checkbox"/>	TLC Test, Advancement Chair, Committee Chairperson						
Jane, Eliza	<input type="checkbox"/>	Troop Ministry Liaison						

Tentpeg, Tommy	<input checked="" type="checkbox"/>	Trailman	Fox		01/01/2012	9		
Tentpeg, Tyler	<input checked="" type="checkbox"/>	Trailman	Hawk	Screaching Eagle	03/04/2012	9		
Tentpeg, William	<input type="checkbox"/>	Troop Ministry Liaison, Chaplain						
Tentpeg, Tim	<input checked="" type="checkbox"/>	Trailman	Adventurer	Avengers	03/10/2005	16		

Update selected Trailman level: Level unchanged.

Update selected user patrol: Patrol unchanged.

Update selected Trailman grade: Grade unchanged.

Process bulk

For the basic functionality, you will click the check box next to each member you wish to update. Then, using the bottom controls, select what you wish to set for each parameter. (e.g., change all of the selected names to be set as Navigator level. Or, change all of the selected names to be set to the Seventh grade.) Once everyone has been selected, and the desired change is set in the controls, click the "Process bulk" button to apply the specified setting to every selected member record.

Tips and Tricks

There are a few notes to usage of this tool that will make the execution of some of these changes much easier to navigate.

Filtering

Filtering is definitely your friend when it comes to making changes – especially when you have a larger Troop. After you have clicked to enter the Bulk Member Actions screen, all of the normal Troop Members filters still appear and function at the top of the screen. As such, it may be easier to filter your list, which will condense it down for easier management. An example would be to choose to only display those Trailmen at the Fox Level so you can perhaps change several of them from a Grade of Kindergarten to First. In the end, just remember that those filters at the top function while in the Bulk Member Action tool and you can use them to your advantage.

Annual Level and Patrol Changes

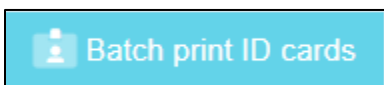
Each program year, your Troop will have Trailmen moving up to the next Level, Grade and/or possibly to a different Patrol. To make this progression process easier within Trail Life Connect, a recommended best practice is to start from the top Level of your Troop and work your way down to the bottom Level as you make these annual changes.

- First, filter your list to display everyone at the Navigator Level*
 - Make Level/Patrol/Grade changes for those Navigators who are moving up to Adventurers
- Next, filter your list to display everyone at the Mountain Lion Level
 - Make Level/Patrol/Grade changes for those Mountain Lions who are moving up to Navigators
 - Then make any relevant Patrol/Grade changes for 1st year Mountain Lions as they enter year 2
- Next, filter your list to display everyone at the Hawk Level
 - Make Level/Patrol/Grade changes for those Hawks who are moving up to Mountain Lions
 - Then make any relevant Patrol/Grade changes for 1st year Hawks as they enter year 2
- Finally, filter your list to display everyone at the Fox Level
 - Make Level/Patrol/Grade changes for those Foxes who are moving up to Hawks
 - Then make any relevant Patrol/Grade changes for 1st year Foxes as they enter year 2

**Note: the reason for starting with the Navigator Level is because you will not need to adjust the Level for an Adventurer as they move up, and out, of that Level. When a Trailman turns 18, the system will automatically convert his youth account to an adult account. You can make any overall Adventurer Patrol/Grade changes at the beginning of the process, or at the end, as you desire.*

Another possible thought as you organize your Trailmen and plan for these Level changes is to create and use Patrol names that will help you easily identify where the boys are in their progression. This is a particularly helpful tactic within the Woodlands Trail program. It could be unique names, where something like "Gray Foxes" are those who are 1st year Fox Level Trailmen, and "Red Foxes" is the Patrol for 2nd year Fox Level Trailmen. Alternatively, the naming convention could be more straightforward with Patrol names like "Fox – Year 1" and "Fox – Year 2." If you employ a Patrol naming convention in this manner, then you can further condense your Bulk Member Actions list by using the Level filter *and* the Patrol filter. This method may help you to more easily target specific groups of Trailmen who need to undergo the same changes.

An additional button which is present at the bottom of the screen when using the Bulk Member Actions tools is the ability to "Batch print ID cards." Use this button to select a group of relevant individuals and create a PDF output containing ID cards for each registered member.



The Bulk Member Actions tool is a powerful item within the Troop Members list in Trail Life Connect and can save significant amounts of time when your Troop needs to print multiple ID cards at once or make Level, Patrol, or Grade changes to multiple Trailmen at the same time.