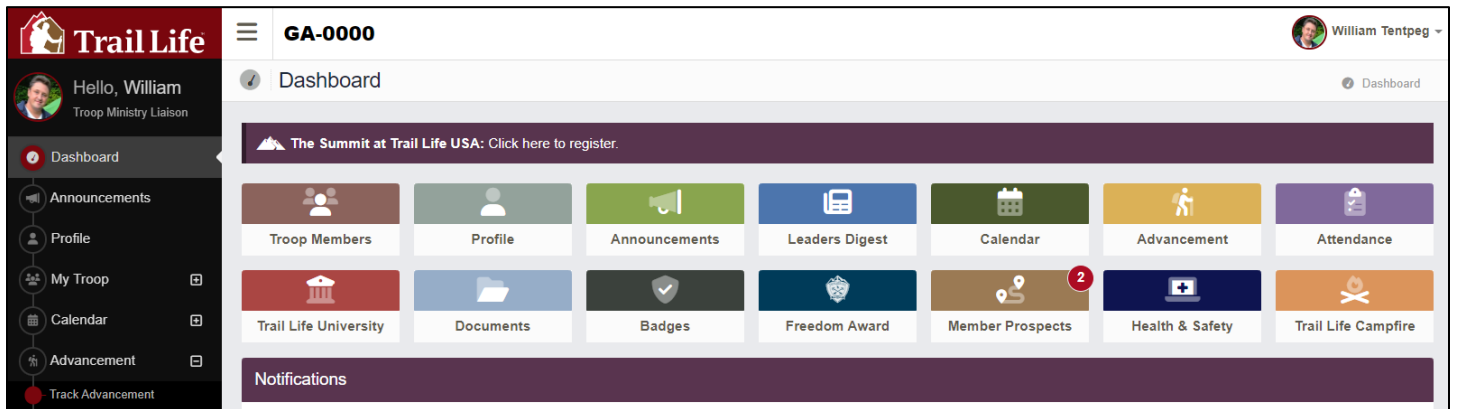# Tracking and Recording Advancement Progress in Trail Life Connect

This document outlines how to track Trailman advancement progress, as well as how to record badge/award completion, using Trail Life Connect. Screen views are from the perspective of the Troop Ministry Liaison.

To enter a Trailman's advancement information within Trail Life Connect, you must be using a role that has been assigned the permission to "Manage Advancement" for the Troop. Default roles with this permission are: Troop Ministry Liaison, Troopmaster, Committee Chairperson, Advancement Chair, Advisor, Trailmaster, Ranger, and Trail Guide (at all program levels.) It is also possible for the Troop Ministry Liaison to create a custom role that could be assigned the "Manage Advancement" permission, which would allow that individual to enter advancement information when using the role.

Tracking Advancement
To access the screen for entering advancement information, you can either click the tile on the Dashboard labeled "Advancement," or expand "Advancement" on the left menu and click "Track Advancement."
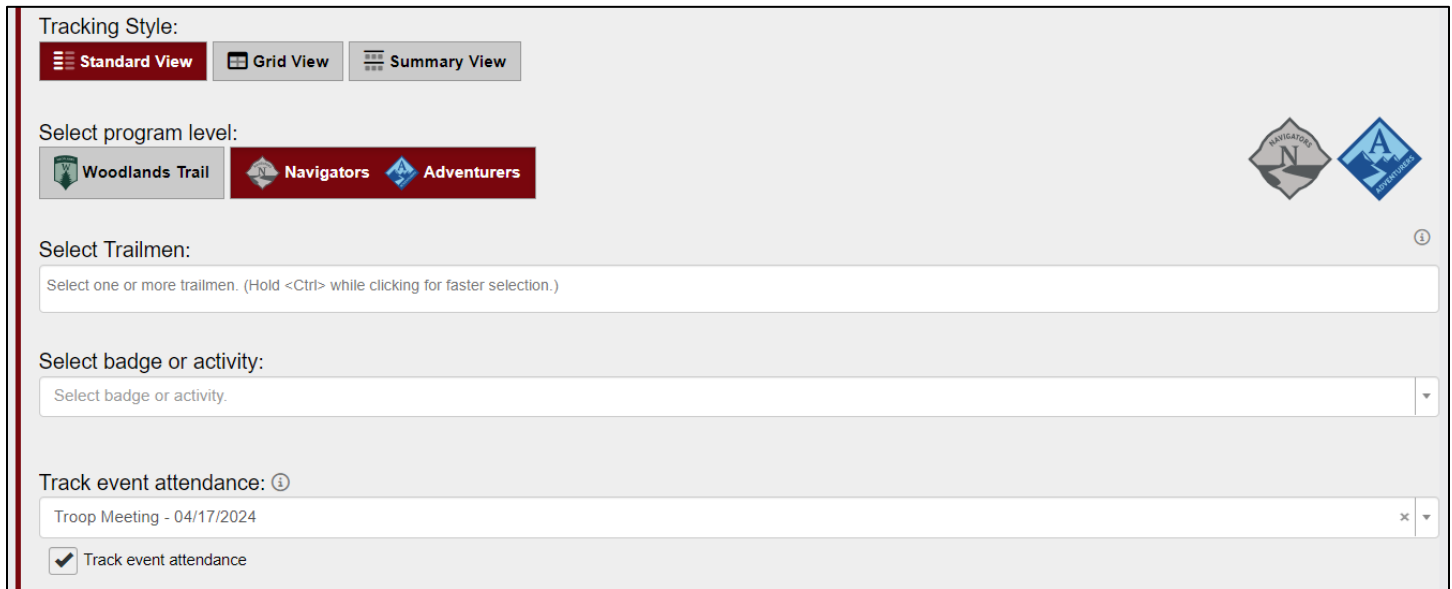

There are two different Tracking Styles you can choose for *recording* Advancements: "Standard View" or "Grid View." A third button next to each of these options is titled "Summary View." The "Summary View" screen is an informational option designed to give a high-level, summary view of your Trailmen's overall progress towards required badges and Ranks.

Standard View

You must make 4 selections to begin tracking advancements (each discussed in further detail below):

- Select the relevant program level
- Select the Trailman or Trailmen
- Select the badge or activity
- Select whether you will additionally be tracking event attendance

Program Level Selection: Only two choices are offered – either Woodlands Trail, or Navigators and Adventurers

Trailmen Selection: You can select one Trailman or multiple Trailmen for whom to record advancement data. If selecting muiltiple Trailmen, hold down the Ctrl key when selecting to make the process easier.
*If a particular Trailman already has an entry for an item you are entering in bulk, the original entry will not be overwritten.

Badge or Activity Selection: Available badges/items for the selected program level will be available to select. After clicking to expand the drop-down list of items, you can scroll to locate, or begin typing the badge/activity name to locate the item you're looking for.
*If you are recording an advancement item for multiple Trailmen, you will see a "Heads up!" notification at the top of the entry area which highlights a few items to consider (shown within the blue box in the image below.)

Track Event Attendance: This option is checked by default. If checked, when Advancement data is entered and saved, any listed Trailman will also be marked as having attended the specific event that is listed. If the correct event for tracking attendance isn't displayed, you can change the selection to a different event. If you do not wish to track attendance for a particular event while entering advancement data, uncheck the box for "Track event attendance."

Information Entry

Once each of the selectors are set, you are ready to enter advancement information. The requirements for the specific badge or activity are displayed below the selectors. As the "Heads up!" notification indicates – all of the requirements will appear blank if you are recording for multiple Trailmen at one time. If you wish to see the completed items that have been achieved by a specific Trailman, you will need to remove the other names and only display his name in the "Select Trailmen" dialogue box.

To record partial progress while work is being completed on a badge or activity, click the check box next to the completed requirement and then click the date field to enter the date the item was completed. If necessary, or desired, also enter descriptive notes into the dialogue box to provide more detailed information. After all relevant items have been entered, scroll to the bottom to click the "Submit Progress" button to record the items in the advancement record for the listed Trailman, or Trailmen.

When all of the necessary requirements are completed for a particular badge or activity, the completion percentage for the Trailman will change to 100%. Also, the field for "Completed On" will populate with the date when the final requirement was populated and saved.

*If a Trailman earned a badge in the past but it was never recorded or awarded, and if the partial requirement specifics are not known, you can enter only the "Completed On" date in the corresponding field at the top to mark that award as being 100% complete. There is also a dialogue box below "Completed On" to add notes if further information is helpful to provide there.

Completion Distinctions (3 in all)

- <u>Completed On</u> – this should reflect the date when the Trailman completed the final requirement for earning the badge or award. It signifies that his work is finished towards earning the item.

- <u>Awarded On</u> – this should reflect the date when the Trailman was physically given the award. For most Troops, this will be the date of a Court of Honor (though some Troops may wish to deliver/award the badges and items at Troop meetings throughout the year.) Awards that are 100% completed are populated automatically to the Court of Honor Report. When the item is marked as "Awarded" (or delivered) with a date, it is cleared from the Court of Honor report. It is best to leave "Awarded On" blank until you have delivered the item to the Trailman. If the "Awarded On" date is entered prematurely, the Trailman's name and award will not appear on the Court of Honor report and his public recognition may be missed.

Trail Life

- Purchased (checkbox) – this box is to be checked only after the award has been purchased through the store. All completed awards (100%) are populated to an Awards Shopping List to facilitate ordering all needed awards for a Court of Honor. Once ordered, the box can be checked – but if it is checked prior to that time, it will not appear on the shopping list and may not get ordered. *The "purchased" checkbox also appears on the 'Awards Shopping List' screen. If checked there, it translates over to the Trailman's advancement record – so there is no need to mark the checkbox twice.

The best order of operations to use, when approaching a Court of Honor, would be:

1. Make sure any/all advancement completion information has been entered and is up-to-date
2. Use the Shopping List to order the completed awards you'll need; on the Shopping List page, mark items as "Purchased" after you've purchased them (clearing out the current Shopping List.) The Trailman's advancement record *and* the Court of Honor report will reflect the check mark in the "Purchased" box
3. Use the Court of Honor Report as your script for the evening (it is printable.) After the ceremony, mark the "Awarded On" date on the Court of Honor Report for all awards that were delivered to the listed Trailmen. This date will populate and be reflected on each Trailman's advancement record (and also clear out the current Court of Honor Report)

General Tips for Standard View

- In Standard View you can begin tracking partial completion of a badge or activity by entering text in the corresponding dialogue box and submitting the record – without checking the checkbox for an item being completed. The information you enter will still be retained within the Trailman's advancement record. If no item is yet completed, the badge or activity will simply appear on their record with a completion percentage of 0% (until the first item is completed, etc.) One example might be a Service Star. If a Navigator requires 15 hours for a Service Star, chances are they won't finalize all of those hours in one setting. Simply type in the dialogue box: "2 hours volunteering at local food pantry" and then submit. The Service Star will show on his record, as 0% complete, but with the note attached regarding the 2 hours completed. Once all 15 hours are logged, you can then mark the completion checkbox. (*Note: this tracking of progress within items like Service Stars only works using the Standard View for tracking Advancements.)

- As you are entering advancement information for one Trailman, or multiple Trailmen, within the Troop – it is always a good idea to spot check the results to make sure everything was entered correctly. You can do this on the 'Track Advancement' screen by singling out the individual Trailman and reviewing his progress on a particular item. You can also navigate to the Trailman's profile in the Troop Members list and go to the Advancement tab of his profile to see advancement progress listed there, including completion percentages of the various items.

- Standard View is the best way to record advancement progress on the night of a Troop meeting, as this view is optimized for mobile devices and entering dates on the spot.

Grid View

Similar to using Standard View, getting started with tracking Advancement in Grid View requires the selection of the program level, one or more Trailmen, and the specific badge or activity to track.

New items that appear when switching to Grid View are:

- **Track date** (only available if not tracking attendance; enter the date that will be applied when marking individual items as complete)
- **Track comments** (add comments pertaining to the current items being checked as complete)
- **Lock current completed** (this helps retain any currently completed items from accidentally being unchecked, inadvertently marking them as incomplete. *This option is checked by default.)
- **Show dates** (when checked, displays the earned date under each check mark for completed items)
- **Show requirements progress** (for relevant requirements, progress data is shown; such as 5 Core Skills Badges completed. Progress data is not available for most requirements)
- **Track event attendance** (similar to Standard View; checked by default; leave checked if you wish to additionally track attendance towards the listed event; otherwise uncheck if you don't want to track attendance with the entered advancement data; unchecking activates the "Track date" field above)

When selected, the Grid View will function whether one or more Trailmen are chosen – however the view is more beneficial when multiple Trailmen are displayed. Badge/award completion status is easily viewed across multiple Trailmen to assist in identifying where gaps in completion exist and to assist in planning and where to focus attention for the various levels and patrols.

		Aiken, Campy (Adult)	Forester, Ferdinand	Forester, Frank	Jones, Jeff (Adult)	Adventurers Average	All Levels Average
Outdoor Life (2023) — Outdoor Skills		☑	☑	☑	☑	☑	☑
Part A - Do all of the following requirements (1-3)							
1. Consider what we can learn about God and his creation from working, playing, and doing activities outdoors as opposed to doing the same activities indoors (Do one: 1a or 1b). Do one of the following:							
	1a. Participate in a discussion about this topic with your patrol, Troop, family, or another group.	✗	✓	✓	✗	50%	50%
	1b. Write a paper or prepare a presentation about what you learned from your research and thinking about the above issue.	✗	✓	✓	✗	50%	50%

- Percentage averages are displayed for specific levels, as well as all levels (if multiple levels are displayed at once.)
- Checking the top check box right under a Trailman's name will mark every incomplete item for the current badge or activity as complete for that Trailman.
- Checking the top check box under the Level Average column header will mark every incomplete item for the current badge or activity as complete for every Trailman currently displayed within that Level.
- Checking the top check box under the "All Levels Average" column header will mark every incomplete item for the current badge or activity as complete for every Trailman currently displayed on the screen.

General Tips for Grid View

- While actively recording new advancement progress – if you inadvertently click to mark an item as complete by mistake, you can click it again to remove the check without adding the item for that Trailman.

- While Grid View is a fantastic option for bulk entry and planning, the best way to record items during a Troop meeting is using the Standard View (as this view is optimized for mobile devices and entering date on the spot.)

*Special Notes for Woodlands Trail Advancement (applicable for both Tracking Styles)

The Woodlands Trail program works differently than the Navigators and Adventurers program. As such, there are a few items to consider when recording advancement information for a Woodlands Trailman.

- *Each Woodlands Trail Level is a 2-year program*
  By design, the Fox, Hawk, and Mountain Lion programs each span 2 years. As outlined in the Woodlands Trail Handbook and corresponding Leader Guide, there are different "Step" requirements under each of the 7 branches for earning Branch Pins and Sylvan Stars. The tracking page for each of the 7 branches, then, is present and utilized for the Trailman across both years of the program.

- *Woodlands Trail Core Steps*
  The Core Step requirements for each branch vary. (i.e., 3 Core for Values, 2 Core for Heritage.) For 5 of the 7 branches, you will notice that the number of available Core lessons is equal to twice the amount required. This was designed so that Core Steps do not repeat from year to year. So, in his first year as a Hawk, the Trailman will complete 3 of the 6 available Values Core Steps as he works towards earning the Branch Pin. Then, in his second year, he will complete the remaining 3 available Core Steps as he works towards earning the corresponding Sylvan Star. Within a Level (Fox, Hawk, Mountain Lion) no Core Steps are repeated during a Trailman's time within that level.

- *Woodlands Trail Elective Steps*
  The selection of Elective Steps is larger, providing a variety to choose from. However, following the same system of logic as the Core Steps – the chosen Electives should not repeat, but be different each year so that a Trailman within a Level does not repeat the same information from year to year. Not only does this provide him with a broader experience, but recording advancements will not be possible as you cannot record one Elective twice over the course of the 2-year program Level cycle.

- *Branch* Pins
  As soon as a Woodlands Trailman completes the first set of Core, Elective, and Hit the Trail requirements, the corresponding Branch Pin will automatically populate to his record. (Partial progress is not reflected on a Woodlands Trailman's profile, but can be seen within the 'Track Advancement' page.)

- *Forest Award*
  Completion of all 7 Branch Pins *does not* automatically populate achievement of the Forest Award. The Forest Award must be recorded/logged separately, after each Trailman completes the requirements for earning all 7 Branch Pins.

- *Sylvan Stars*
  As soon as a Woodlands Trailman completes the second set of Core, Elective, and Hit the Trail requirements, the corresponding Sylvan Star will automatically populate to his record.
  *This will mean, then, using the Heritage Branch as an example – all 4 Core Steps will be recorded as completed; 2 different Elective Steps will be recorded as completed; 2 different Hit the Trail Steps will be completed. The Sylvan Stars will not populate until the full 2 years of requirements are completed under each Branch.

- *Family Home Activities*
  As outlined in the Woodlands Trail Handbook and corresponding Leader Guide, if a Trailman misses a Core lesson, Elective lesson, or Hit the Trail activity – the missed Step can be made up by completing 2 Family Home Activities. The 2 Family Home Activities will effectively replace the one missed Step.
  *This exception can only be implemented for one missed Step, per Branch, per year.
  The 'Advancement Tracking' page reflects this by providing 4 total Family Home Activity options – 2 for the first year, and 2 for the second year

- *Core/Elective Exceptions*
  There are 2 Branches that are slightly different in their requirements, however the advancement tracking system is modified to account for the differences.
  The Hobbies Branch only has one Core Step. This Step is repeated each year. Items were created thusly to record the Core Hobbies Step for year one and a second instance for year two.
  The Sports & Fitness Branch requires two Core Steps, but there are only two available. Both of the Sports & Fitness Core Steps are also repeated each year. Likewise, items were created thusly to record each set for year one and for year two.
  So, for Hobbies and Sports & Fitness, you will be repeating the Core Steps each year (as exceptions to the rule of not repeating.) However, these are laid out appropriately within the Advancement Tracking system to allow for recording of the repeats each year.

- *Attendance Tracking with Woodlands Trail Advancement*
  For most Steps within the various Branches, the particular items can be added to Calendar events under Activity Plans so that when marking Attendance via the Track Attendance page, the corresponding Step will be awarded to the attending Trailmen. However, this can get tricky with Hit the Trail Steps (since you'll need to specify Year 1 or Year 2, depending) as well as Core requirements for Hobbies and Sports & Fitness Branches (which also utilize Year 1 and Year 2 designations.) As a result, if using the integration to track Advancement and Attendance together, it would be best to use the "Track Advancement" page rather than the "Track Attendance" page for those items.

Trail Life

Summary View

This option within Track Advancement is particularly helpful with Navigators and Adventurers, and provides a way to view overall progress from a high level. You can obtain summary information by selecting a specific Badge or Rank, or a collection. A few use cases might be selecting "All Adventurers" in the 'Select Trailmen' field, and then "True Freedom Ranks & Freedom Award" in the selection for badges or activities. This result would show each Adventurer Trailman along the top and each Rank along the side, and either completion or progress percentage towards the Adventurer level Ranks. Similarly, selecting "All Adventurers" and "True Freedom Trail Badges" will show completion or progress towards each of the required badges at the Adventurer level. Again, this screen is designed to provide high-level, summary information on overall progress without getting into specific details.

	Aiken, Campy (Adult)	Forester, Ferdinand	Forester, Frank	Jones, Jeff (Adult)	Rivers, Marc (Adult)	Tentpeg, Tim (Adult)	Adventurers Completed Average	All Levels Completed Average
Journey Rank (2023)								
Ascent Rank (2023)								
Horizon Rank (2023)	✓		✓			✓	50%	50%
The Freedom Award		86%						

	Aiken, Campy (Adult)	Forester, Ferdinand	Forester, Frank	Jones, Jeff (Adult)	Rivers, Marc (Adult)	Tentpeg, Tim (Adult)	Adventurers Completed Average	All Levels Completed Average
Citizenship	✓		✓			✓	50%	50%
Emergency Preparedness	✓		✓			✓	50%	50%
Family Man	✓		✓			✓	50%	50%
Outdoor Life (2023)		11%	11%					
Personal Resources (2023)	8%	8%	8%	8%	8%	8%		
Cycling (Fitness Badge) (2023)	✓					✓	33.3%	33.3%
Fitness (Fitness Badge)	✓			✓		✓	50%	50%
Hiking (Fitness Badge)			✓				16.7%	16.7%
Swimming (Fitness Badge)								