Trail Life™

Adventure › Character › Leadership

Trail Life Connect Roles and Permissions

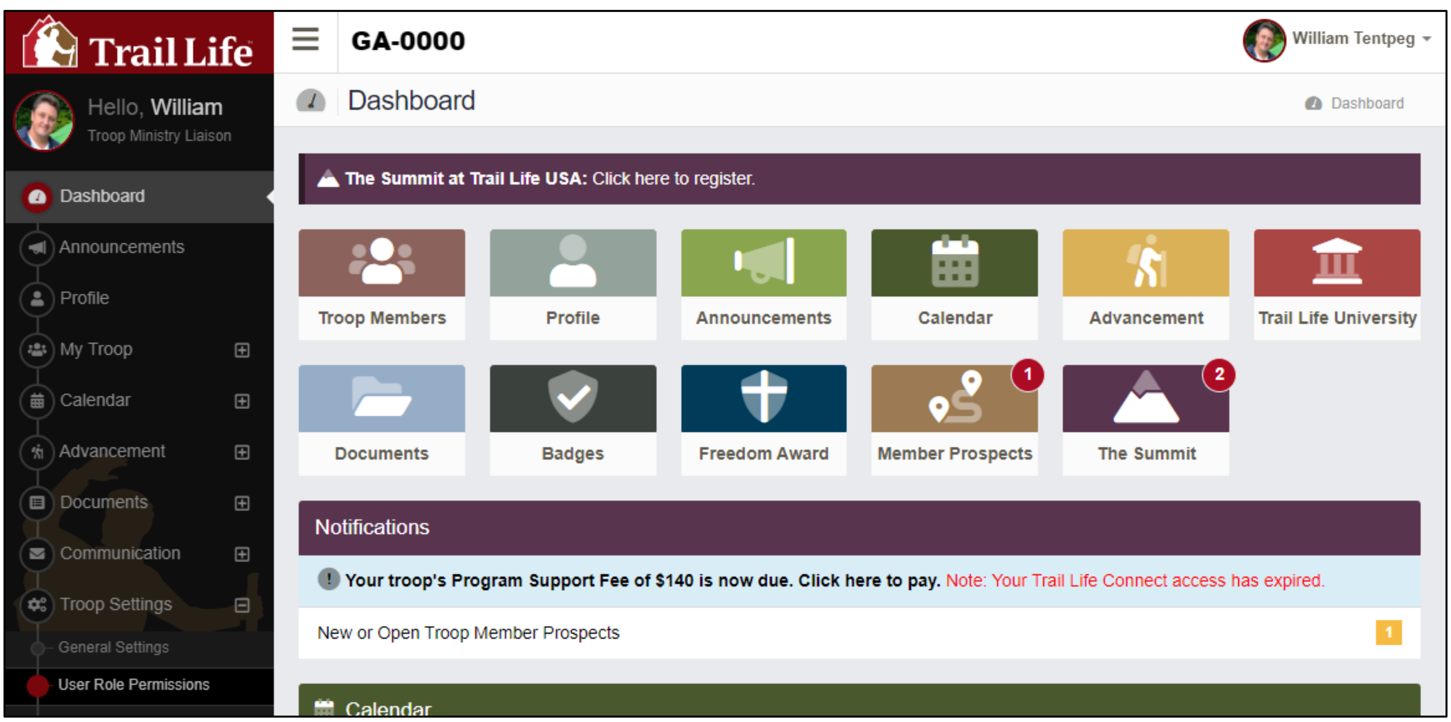
This document provides an overview of Roles and Permissions within Trail Life Connect. Views shown are from the perspective of the Troop Ministry Liaison.

The ability to manage and assign adult leader Roles and Permissions within Trail Life Connect is automatically granted to the Troop Ministry Liaison by default, with only two situational exceptions:

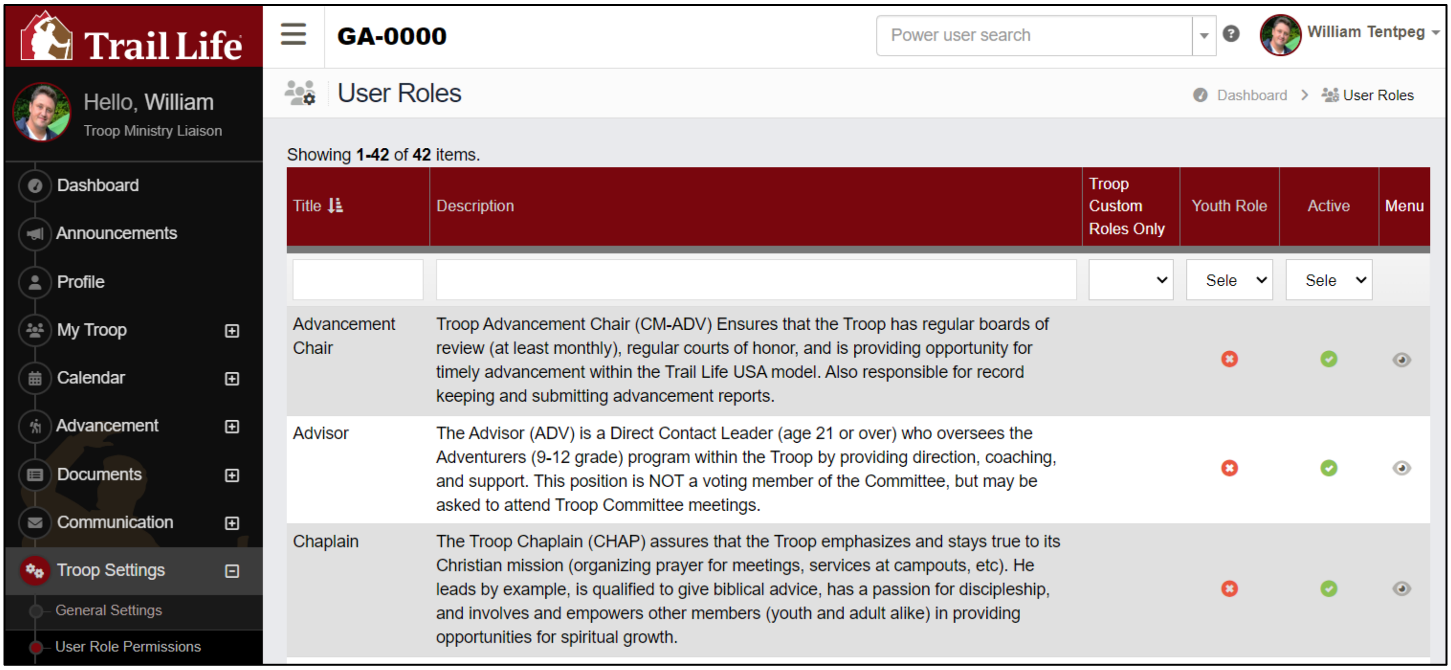
1. The Senior Ministry Leader can make changes to the Troop Ministry Liaison Role *only*.
2. The Troop Ministry Liaison can create custom Roles at the Troop level and potentially assign a custom adult leader Role with the permission/ability to also modify and assign Roles within the Troop.

Managing/Creating Roles

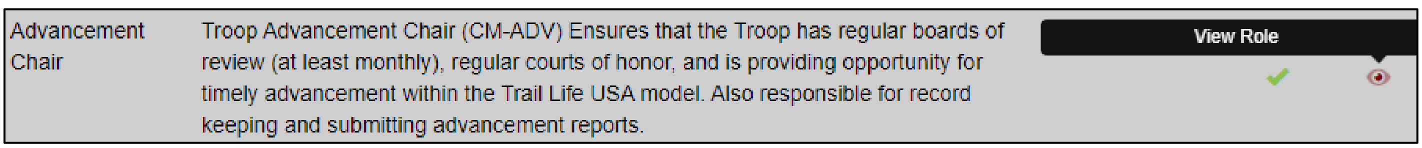
To access Roles and Permissions, navigate to the left menu. Expand "Troop Settings" and then click "User Role Permissions."

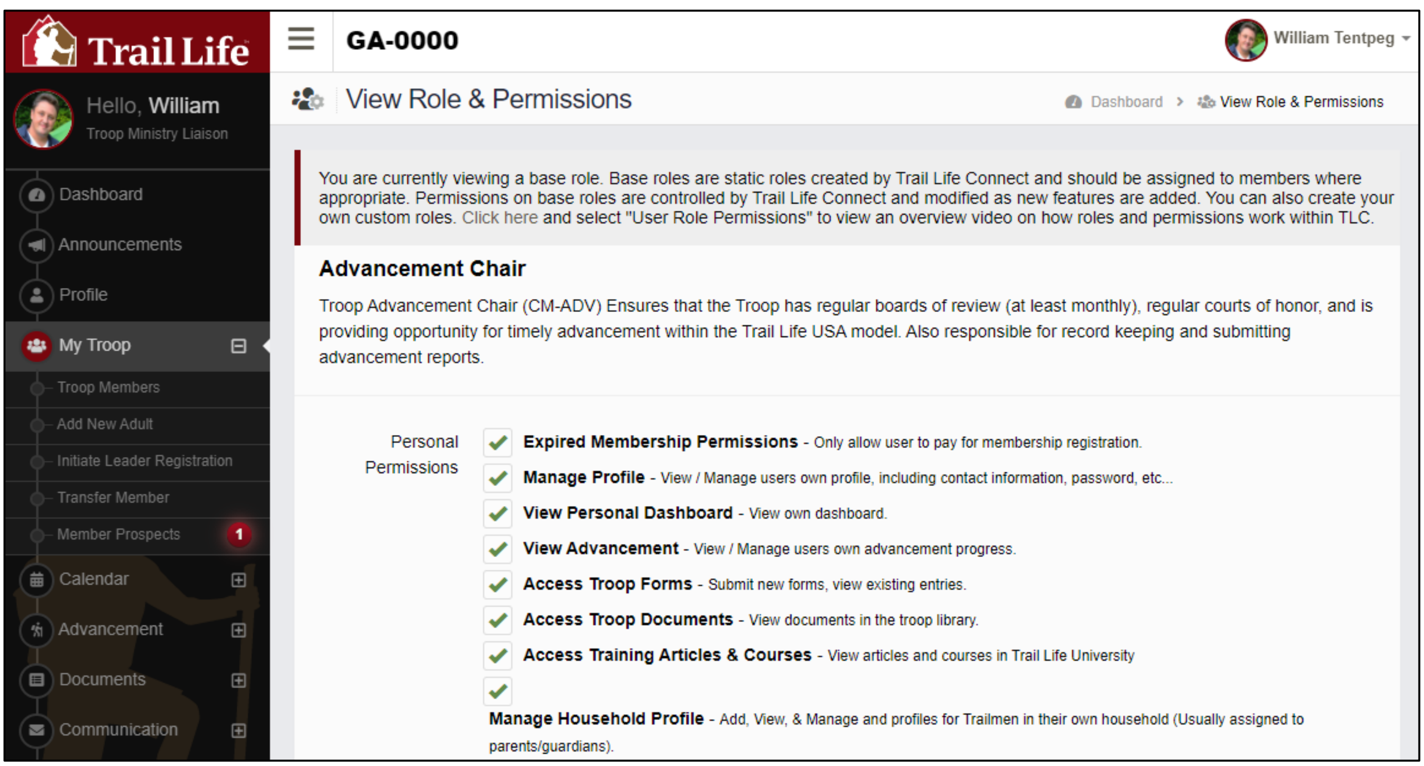


You will see a current list of all the standard Roles that are available. Standard, nationwide Roles are established and set by the Home Office. The ability to view the permissions is present, but permissions cannot be adjusted for standard Roles at the Troop level.

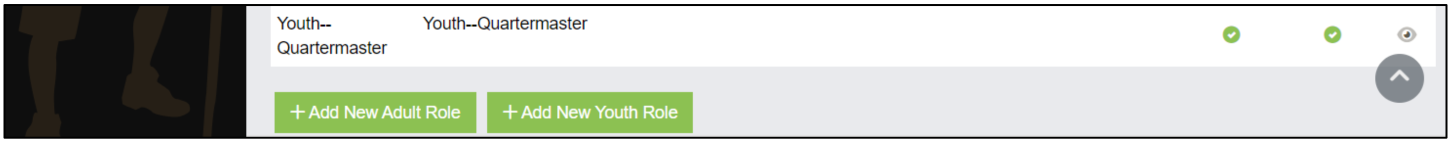


To view the permissions that are set on a particular Role, click the "View Role" icon on the far right. You will be presented with a list of permissions and visibility as to which permissions are set for that Role.

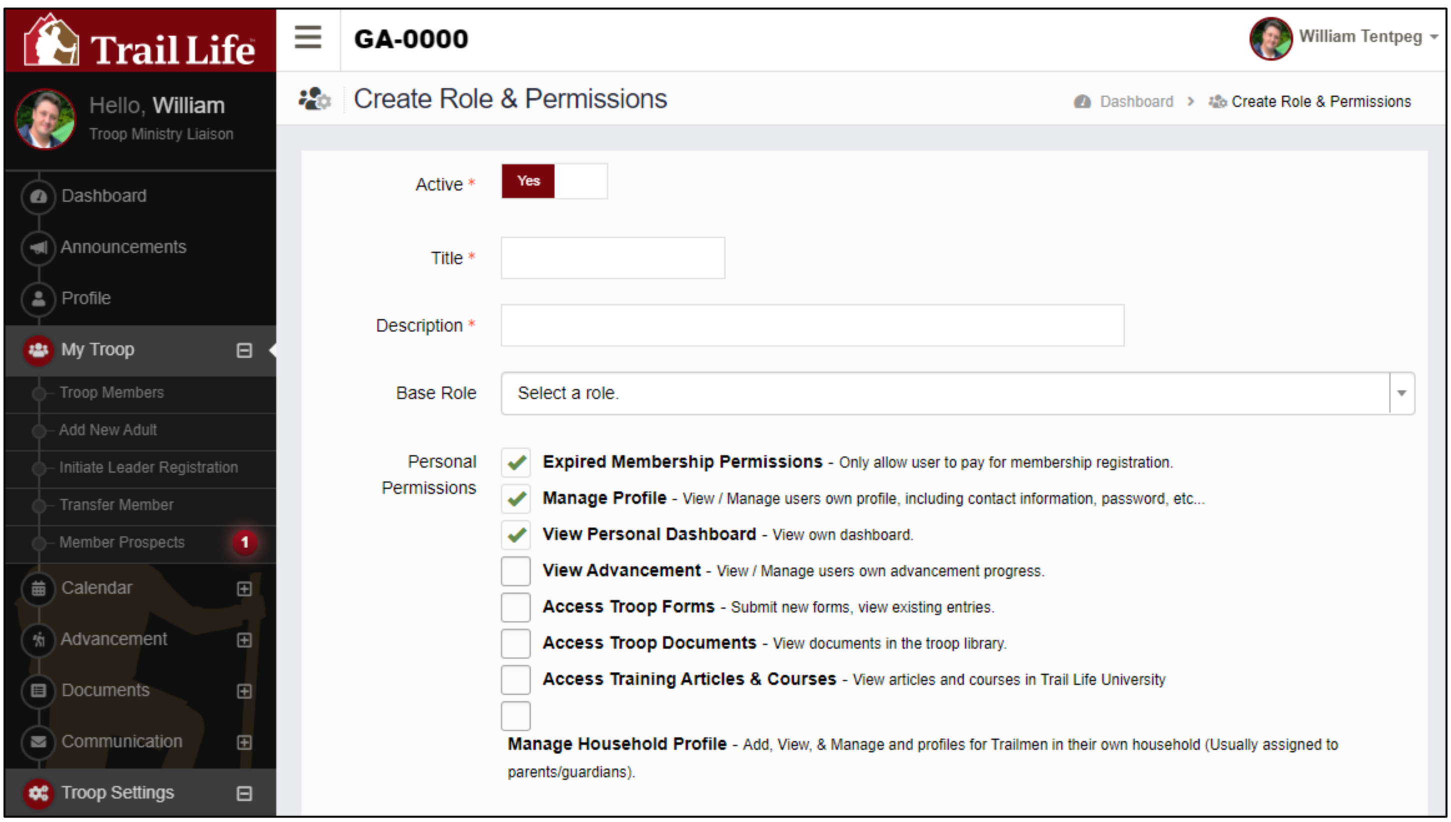




As mentioned previously, the Troop Ministry Liaison can add a new Role. This added Role would be a custom Role that exists only within that Troop and can then be assigned to registered members once created. Custom Adult Roles can be created for specific tasks (e.g., Calendar Management) or for more robust functionality (e.g., TLC Admin.) Custom Youth Roles can be created to expand youth leadership opportunities for Trailmen. To create a new Role, the Troop Ministry Liaison can scroll to the bottom of the list of Roles and click either the “Add New Adult Role” or “Add New Youth Role” button.



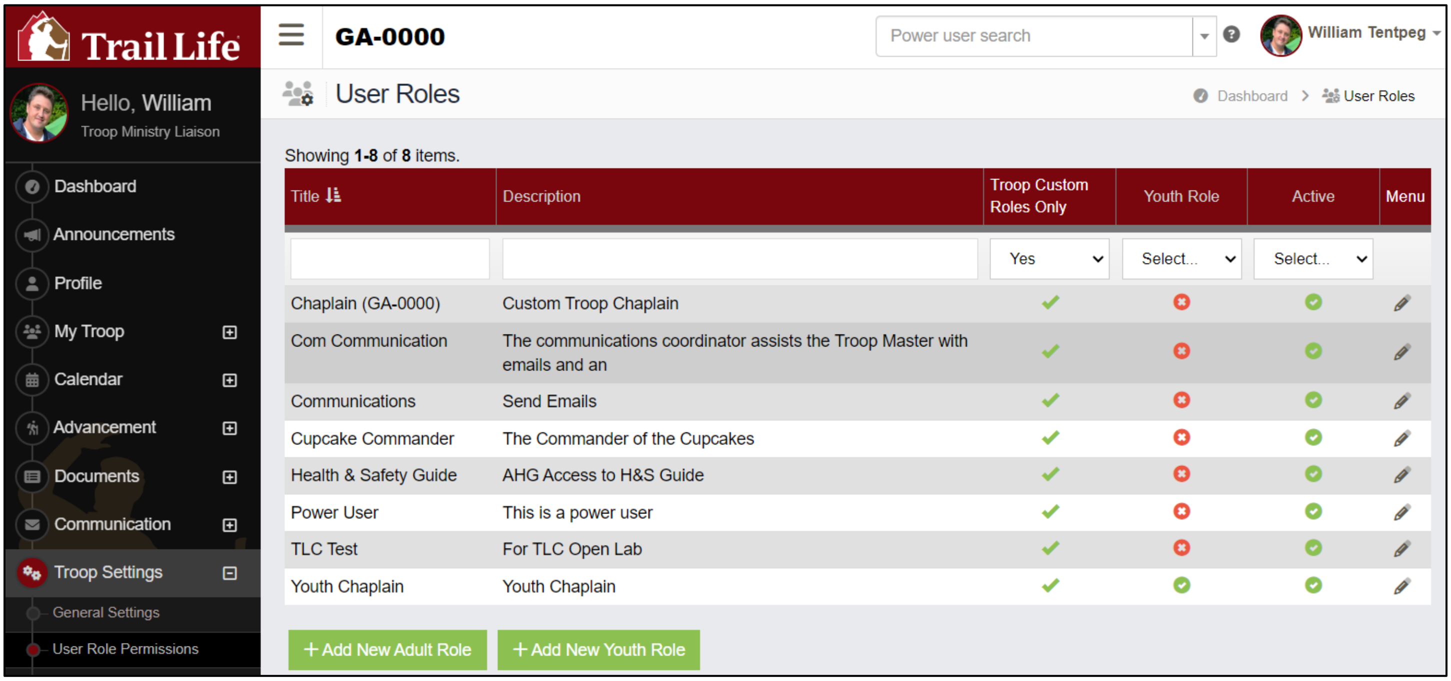
The Role will need a specific, and helpful, ‘Title’ and a ‘Description’ of the purpose of the Role. If desired, adult roles can use a ‘Base Role’ as a starting point, which will begin with all the permissions of the base Role checked as a starting point; you can then add or subtract permissions as needed for the custom adult Role. Alternatively, you can start from scratch in building the custom Role and assigning appropriate permissions as needed. (Custom youth roles cannot be assigned any permissions.)



Once a custom Role is created, it will appear in the list of available Roles. The new Role will have a green check mark in the column that designates it as a Troop Custom Role. You will also notice that the custom created Role does not have a “View” icon to the far right, but an “Edit” icon, as these custom created Roles *can* be edited if necessary.

TLC Test	For TLC Open Lab	✓	✗	✓	✎
Youth Chaplain	Youth Chaplain	✓	✓	✓	✎

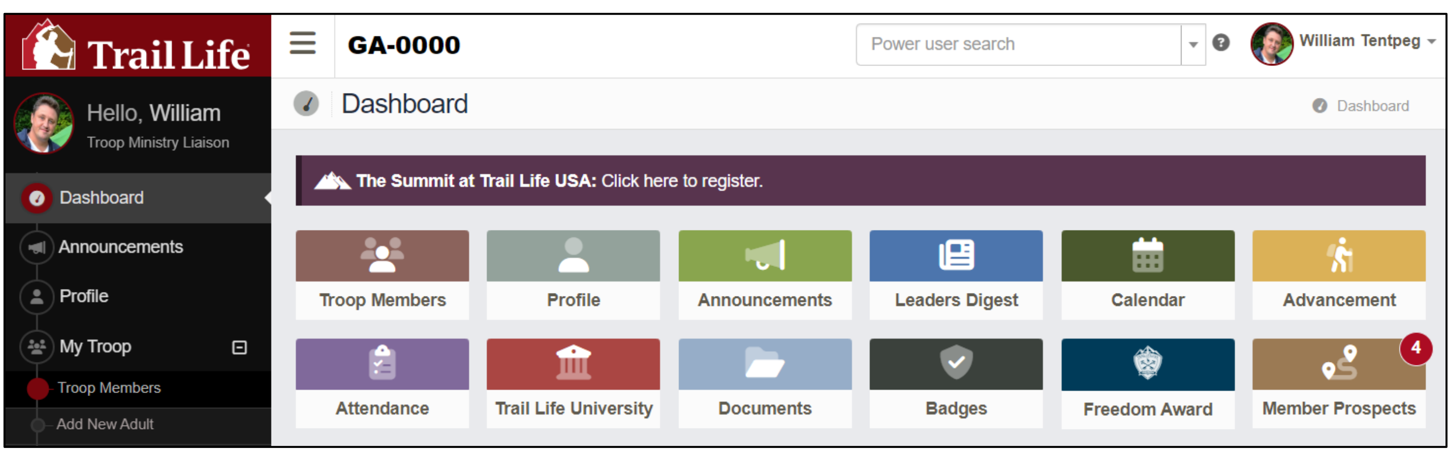
You can also use the search and/or filtering options at the top of the Roles list to search for a Role by title or description, as well as filter the list to show active/deactivated Roles, adult/youth Roles, or to only show Troop Custom Roles.



Note: In the example screen above, a different, custom Role was created for the Chaplain (with some slight differences in permissions from the default Chaplain Role.) If you create custom Roles with similar names to already existing, default Roles, a good best practice is to add/include your Troop name in the title so it is easily identified as a custom Role.

Assigning Or Removing Roles

To assign standard or custom roles to your Troop Members, or to remove an existing role from a Troop Member, expand "My Troop" on the left menu and then click "Troop Members," or click the "Troop Members" tile on the main Dashboard.



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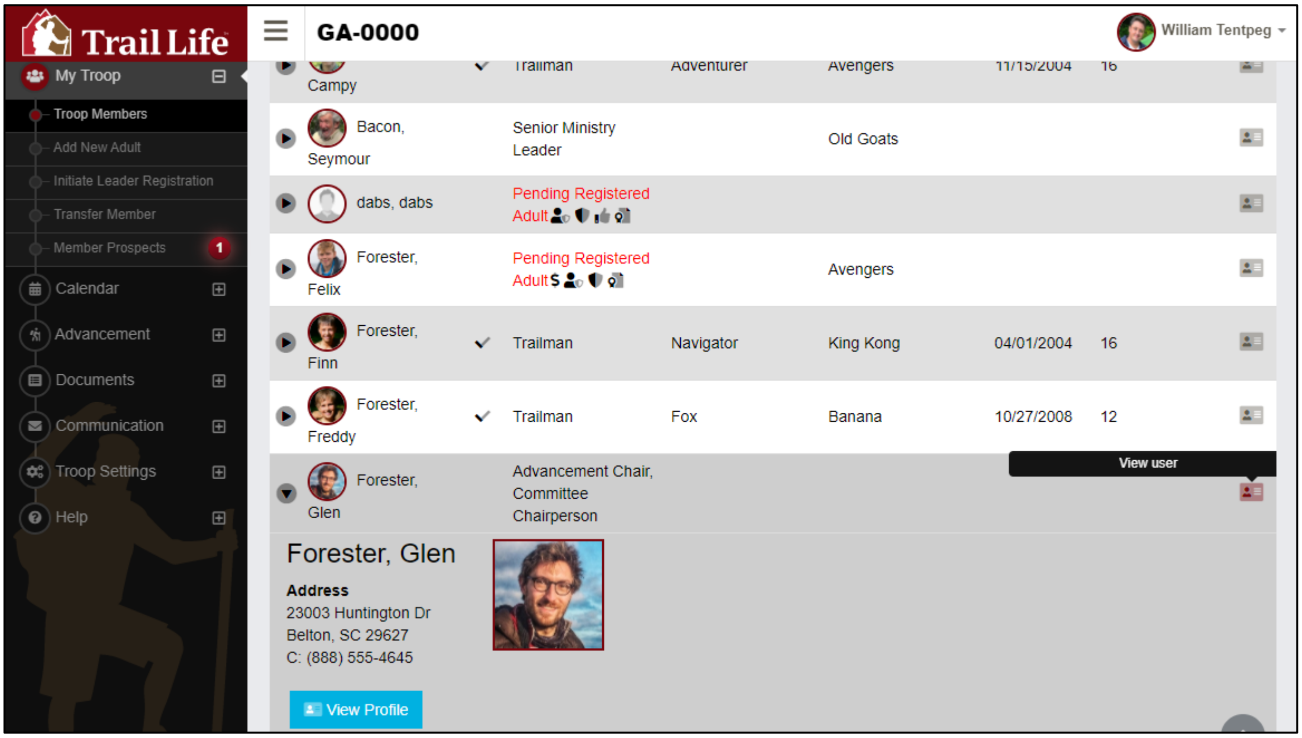
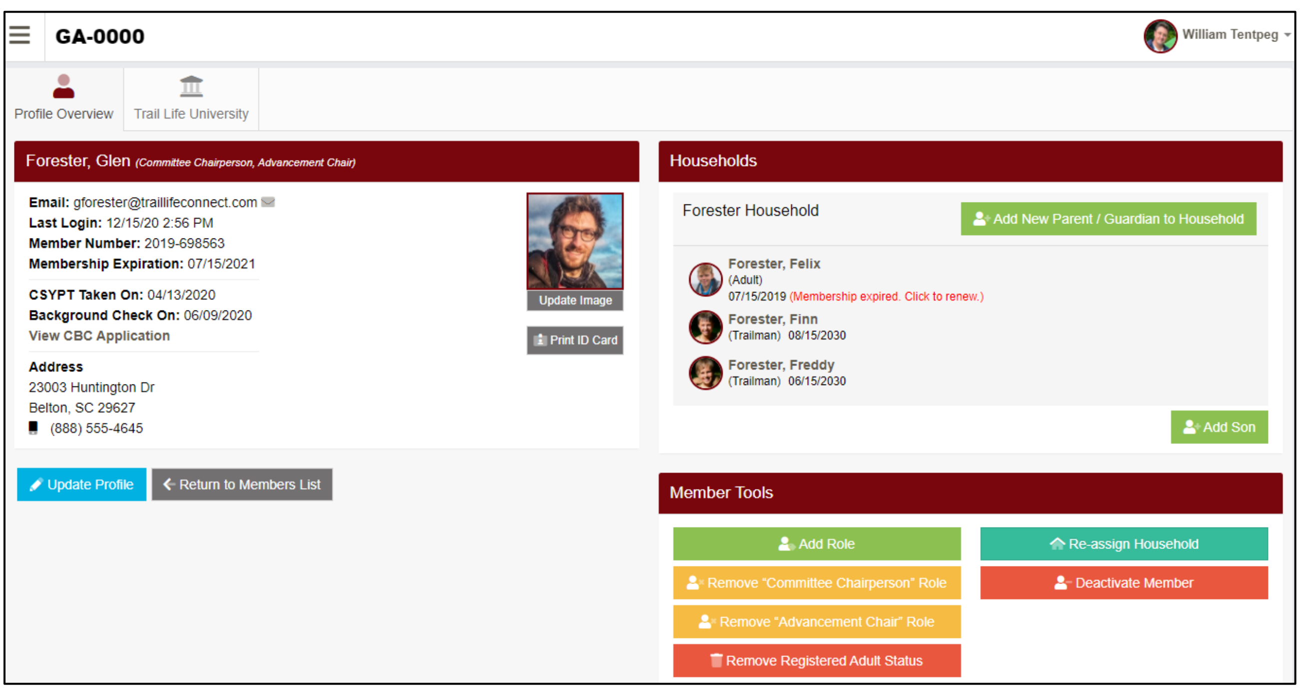
Expand the record of the Member for which you wish to make adjustments, then click either the "View Profile" button on the left, or the "View user" card icon on the right.



Within the Member Profile, under the section titled "Member Tools," you will see a list of currently assigned Roles which can be removed by clicking the appropriate button as well as a button option to add a Role to the individual member. The "Member Tools" section is only available to roles who have the permission to *Manage Troop Roles*. (Typically, this permission is given only to the TML for adult leader role changes.)



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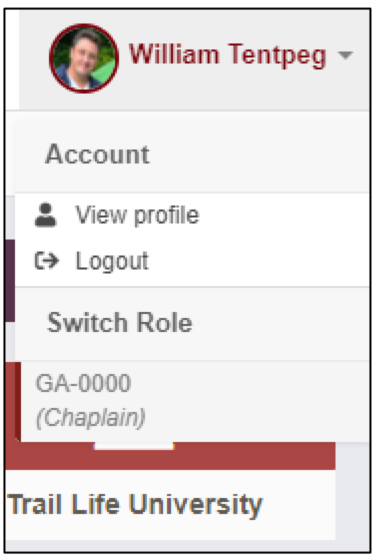
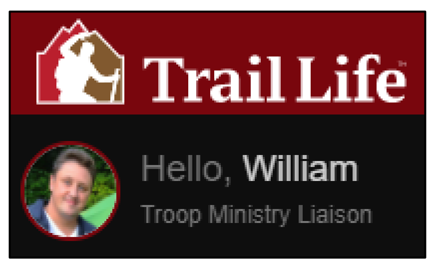
Final Notes

A few final notes and reminders regarding Roles and Permissions:

- If an adult leader feels they do not have permissions they expect or need, the first step would be to go to the Trail Life Connect "Help" menu and click the link to "Contact Troop *XY-1234*." This will send a communication to the appropriate Troop leader who can assist in evaluating their Role and making any necessary adjustments.
- If a standard adult leader Role does not already exist that provides appropriate permissions, the Troop Ministry Liaison can create a custom Troop-level Role, grant any needed permissions to that Role, and can then assign that Role to any registered member in the Troop Members list. (*Use caution and be conservative when granting enhanced permissions to custom roles.)
- While the TML can <u>create</u> custom youth Roles, *adding and removing* these youth roles is also available to the Troopmaster, Committee Chairperson, Advisor, Trailmaster, and Advancement Chair.
- If multiple Roles are assigned to an individual within a Troop, two important items to note would be:

    - As each adult Role will have different permissions applied, the individual may need to switch Roles in order to perform certain functions. To switch between Roles, the leader would need to click the drop-down arrow in the upper right next to their name to find a list of any other Roles assigned to them which they can click in order to switch to that Role. (The currently logged in Role will display in the upper left of the Trail Life Connect screen):





    - Not only are different adult Roles set up to perform different functions based on assigned permissions, but also the Core Leader Roles for the Troop are specifically required for the Troop Charter to be valid. In some cases, a few of these Core Leader Roles are required to perform specific tasks during Charter renewal (such as the SML and TML.) It is important, therefore, to note that if the TML is also the Chaplain (as in the example above) – when the Troop is due to renew its Charter, the TML may be required to perform tasks that would not be available to the Chaplain Role. If William (above) were logged in and switched to the Chaplain Role, but received notifications to complete a TML action, he would not see the prompt on his Dashboard (or would not be able to click any provided links with success) while operating under the Chaplain Role. William would need to switch to the TML Role to perform the necessary TML functions.