

Updating and Using Categories in Trail Life Connect

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

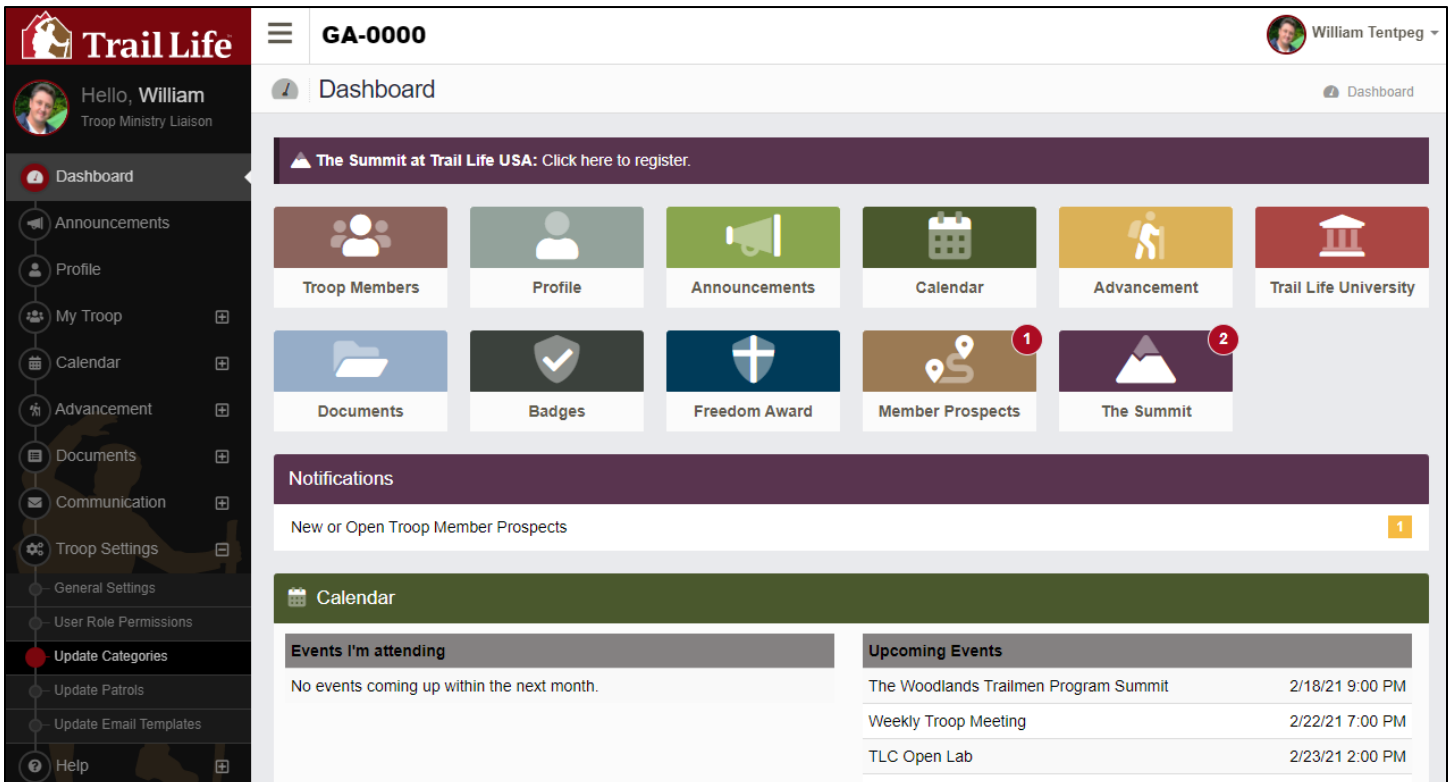
Using Categories

Categories can be created and used to help organize and classify Troop related items such as Forms and Documents.

*By default, Categories can be managed by the Troop Ministry Liaison, Troopmaster, Committee Chairperson, or Advancement Chair. (Other roles with this ability would include any custom Troop roles where the permission to manage Categories has been granted.)

Updating Categories

For the roles mentioned above – to access the area for managing and updating Categories, the Troop leader will navigate to the left menu in Trail Life Connect and expand “Troop Settings,” then click “Update Categories.”



Trail Life GA-0000 William Tentpeg

Hello, William
Troop Ministry Liaison

Dashboard

The Summit at Trail Life USA: Click here to register.

Troop Members	Profile	Announcements	Calendar	Advancement	Trail Life University
Documents	Badges	Freedom Award	Member Prospects ¹	The Summit ²	

Notifications

New or Open Troop Member Prospects ¹

Calendar

Events I'm attending	Upcoming Events
No events coming up within the next month.	The Woodlands Trailmen Program Summit 2/18/21 9:00 PM
	Weekly Troop Meeting 2/22/21 7:00 PM
	TLC Open Lab 2/23/21 2:00 PM

The “Update Categories” page will display any existing Categories that have been created. At a glance, you can also see if those Categories are available to Forms and/or Documents. You can search by Category Title, and filter the list based on where the Categories are available as well as whether to view Active or Deactivated Categories. Additionally, if a Category is no longer relevant you can either choose to click the green check mark to deactivate it, or you can click the trash can icon to the right to delete the Category.

The screenshot shows the 'Update Form / Document Categories' page in the Trail Life system. The user is William Tentpeg, Troop Ministry Liaison. The page displays a list of 5 categories:

Category Title	Available to Forms	Available to Documents	Active	Menu
Administration	✓	✓	✓	🗑️
Advancement	✓	✓	✓	🗑️
Nav / Adv Leaders	✓	✓	✓	🗑️
Parents	✓	✓	✓	🗑️
Woodlands	✓	✓	✓	🗑️

Beneath the Category list, you will find the option to create a new Category and designate where that Category will be available. To create a new Category, type the Category Title into the corresponding box, decide where it will be available, and then click the “Create Category” button.

The screenshot shows the 'Add New Form / Document Category' page. The form includes the following fields:

- Category Title:
- Available to Forms: Yes
- Available to Documents: Yes

Below the form is a green button labeled "+ Create Category".

Category Usage

After your Categories are established, you can begin using them within the corresponding areas where they are available. When adding a new Document, for example, one of the options to specify during the Document setup is the Category.

Trail Life GA-0000 William Tentpeg

Hello, William
Troop Ministry Liaison

Create Static Document

Document Setup

Title *

Description

Active * Yes

Archive this document No

Category: No category specified.

Tags: Administration, Advancement, Nav / Adv Leaders, Parents, Woodlands

Publish Start Date

Publish End Date

Once the document is created and assigned a Category, locating specific documents is further facilitated by the use of the Category filter within the Troop Documents section of the member profile.

Trail Life GA-0000 William Tentpeg

Hello, William
Troop Ministry Liaison

Tentpeg, William
Troop Ministry Liaison, Chaplain

Profile Overview Trail Life University Troop Documents Resources Video Forum

Filter by Tags: Select tags to further filter the documents.

Showing 1-1 of 1 item.

Document title & description	Category	Download
Campout Packing list Be sure to always bring these items with out -basic list	All Categories Administration Advancement Nav / Adv Leaders Parents Woodlands	