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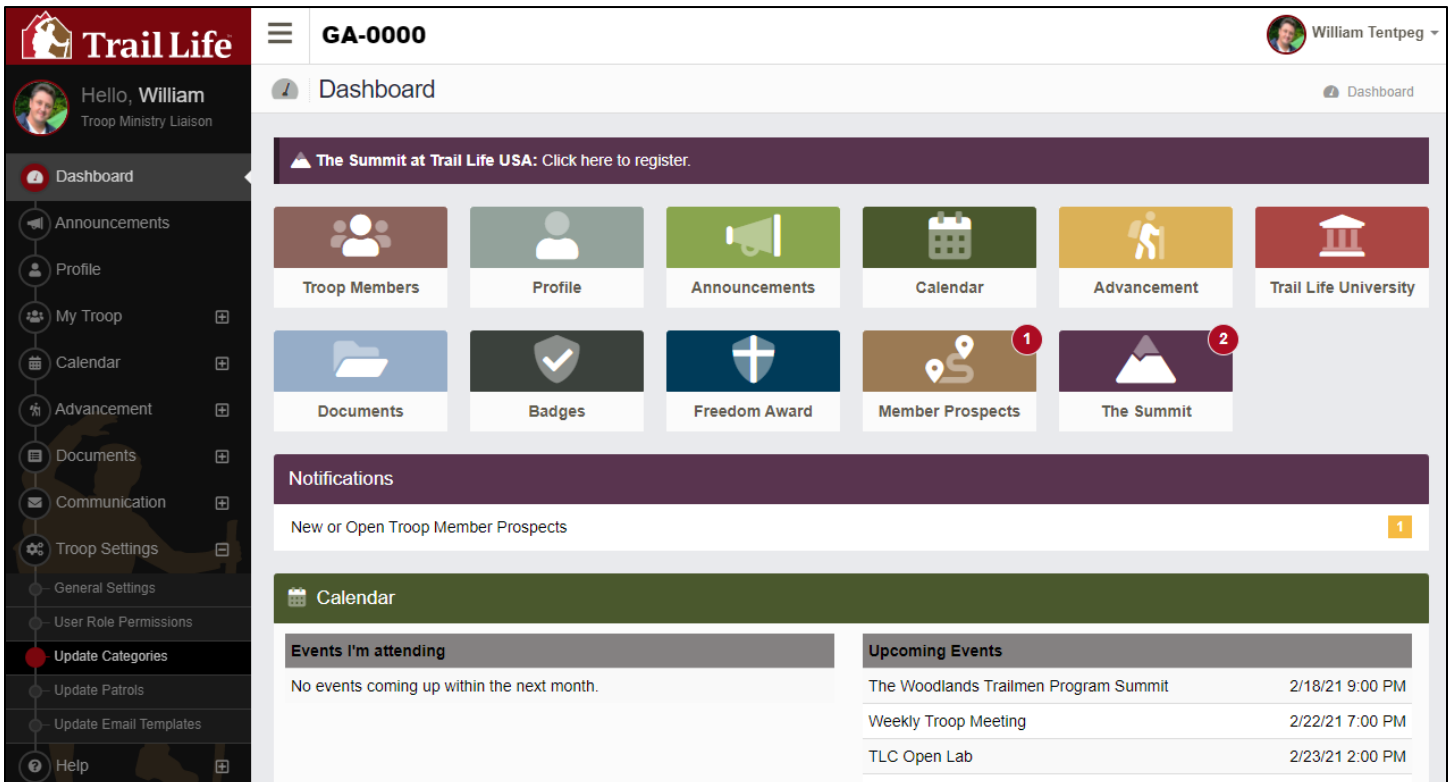
## Using Categories
Categories can be created and used to help organize and classify Troop related items such as Forms and Documents.

*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."

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.



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.



## 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.

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.