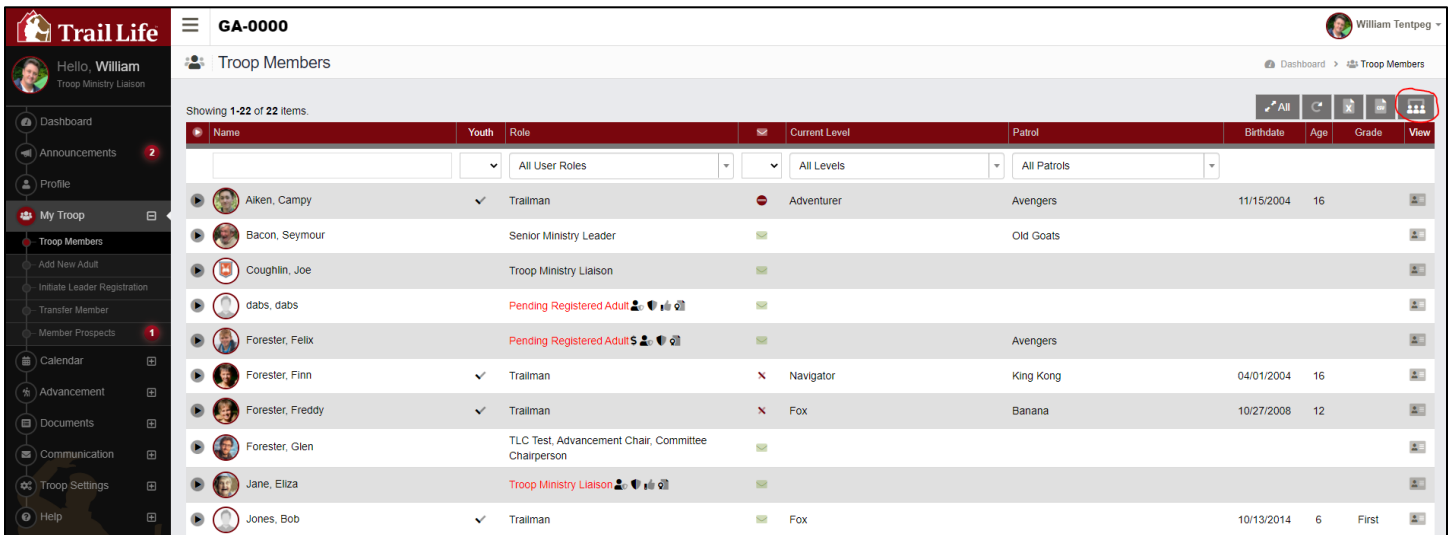# Bulk Member Actions in Trail Life Connect

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.

Trailmen Level, Patrol, and Grade Changes

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 adults 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 Troop Members list.

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.)

Hello, William
Troop Ministry Liaison

- Dashboard
- Announcements **2**
- Profile
- My Troop
  - Troop Members
  - Add New Adult
  - Initiate Leader Registration
  - Transfer Member
  - Member Prospects **1**
- Calendar
- Advancement
- Documents
- Communication
- Troop Settings
- Help

Troop Members   Dashboard > Troop Members

Instructions for bulk member actions ∨

Showing 1-22 of 22 items.

	Name	Youth	Role	✉	Current Level	Patrol	Birthdate	Age	Grade	View
		▾			All Levels ▾	All Patrols ▾				
►	Aiken, 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	✉						
►	Tentpeg, Tommy	✓	Trailman $	✉	Fox		01/01/2012	9		
►	Tentpeg, Tyler	✓	Trailman	✗	Hawk	Screeching Eagle	03/04/2012	9		
►	Tentpeg, William		Troop Ministry Liaison, Chaplain	⊖						
►	Tentpeg, Tim	✓	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 who needs a common update. Then, using the options at the bottom of the screen, 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 can be greatly beneficial when it comes to making common changes – especially when you have a larger Troop. After clicking 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 first filter your list, which will condense it to a smaller subset 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 the filters at the top function while inside 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 suggestion as you organize your Trailmen and plan for these kinds of 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.

Batch Print ID Cards

Following similar steps outlined above, a leader with access to the Bulk Member Actions tool can also choose to print multiple ID cards at one time into one large PDF file. (*Only those adults and/or Trailmen who are fully registered have the ability to print ID Cards.) To batch print a set of ID cards, click the button to enter the Bulk Member Actions tool. Within the list of Troop Members, click the check box next to the members you wish to include. When all desired members are checked, click the corresponding button at the bottom of the screen titled "Batch print ID cards."
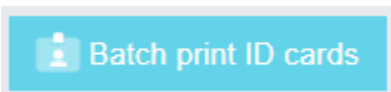
Clearing/Updating Health and Medical Form Dates

The Bulk Member Actions tool can also be used to update the "filed on" dates for member health forms and/or high risk medical forms. When using the tool to make these changes, each field contains two options:

- Clear the dates for the selected members
- Set the "filed on" date for the selected members to today's date

To process these date changes in bulk, click the Bulk Member Actions button at the top of the Troop Members list. Click the check box next to all members for which you wish to make the change, and then select one of the two options for one or both forms at the bottom of the screen before clicking the button to "Process bulk." The dates for all selected members will either be cleared out, or set to today's date based on your selections within each parameter.

Update selected Trailman level:	
Update selected user patrol:	Clear selected user's Health Form dates.
Update selected Trailman grade:	Set selected user's Health Form date to today.
Clear all "Health Form Filed On" dates:	Leave date unchanged.
Clear all "High Risk Medical Form Filed On" dates:	Leave date unchanged. [Process bulk] [Batch print ID cards]

The Bulk Member Actions tool is a powerful tool within the Troop Members list in Trail Life Connect and can save significant amounts of time when your Troop needs to make Level, Patrol, or Grade changes to multiple Trailmen at the same time. Additionally, if desired, a Troop Leader can choose to print ID Cards for multiple registered members in the Troop with one button. Finally, the Bulk Member Actions tool can be used to make changes to the date fields for multiple member health and/or high risk medical forms at one time. For best results, tackle each of these 3 item areas separately rather than attempting too many item changes at the same time (form dates, bulk IDs, and Level/Patrol/Grade changes.)

Trail Life