Adventure › Character › Leadership

Managing Troop Members

This document will show how to manage Troop Members from the perspective of the TML, who has the greatest ability to manage members as well as invite, and add, leaders. The permissions for managing members can be granted/delegated to other Troop leaders through the creation of a custom Troop role. However, the one function that cannot be delegated to anyone else, and must be performed by the TML, is approving Troop leaders.

Troop Members

On the left menu, under "My Troop" is the selection for viewing "Troop Members." On the Troop Members page, you will find a listing of everyone in the Troop. Search and sort filters are available along the top, allowing you to locate specific members or groups of members (*See **Figure Ia***):

- Search by *Name*
- Filter the *Youth* column to show everyone, only youth, or only adults
- Select a *Role* to find one or more individuals who have that role assigned
- Filter the Email column to determine who can, or cannot, currently receive emails from TLC
- Select a *Current Level* to only show individuals at that level
- Select a *Patrol* to only show individuals within that patrol
- Click a column header to sort the list in ascending or descending order by that column

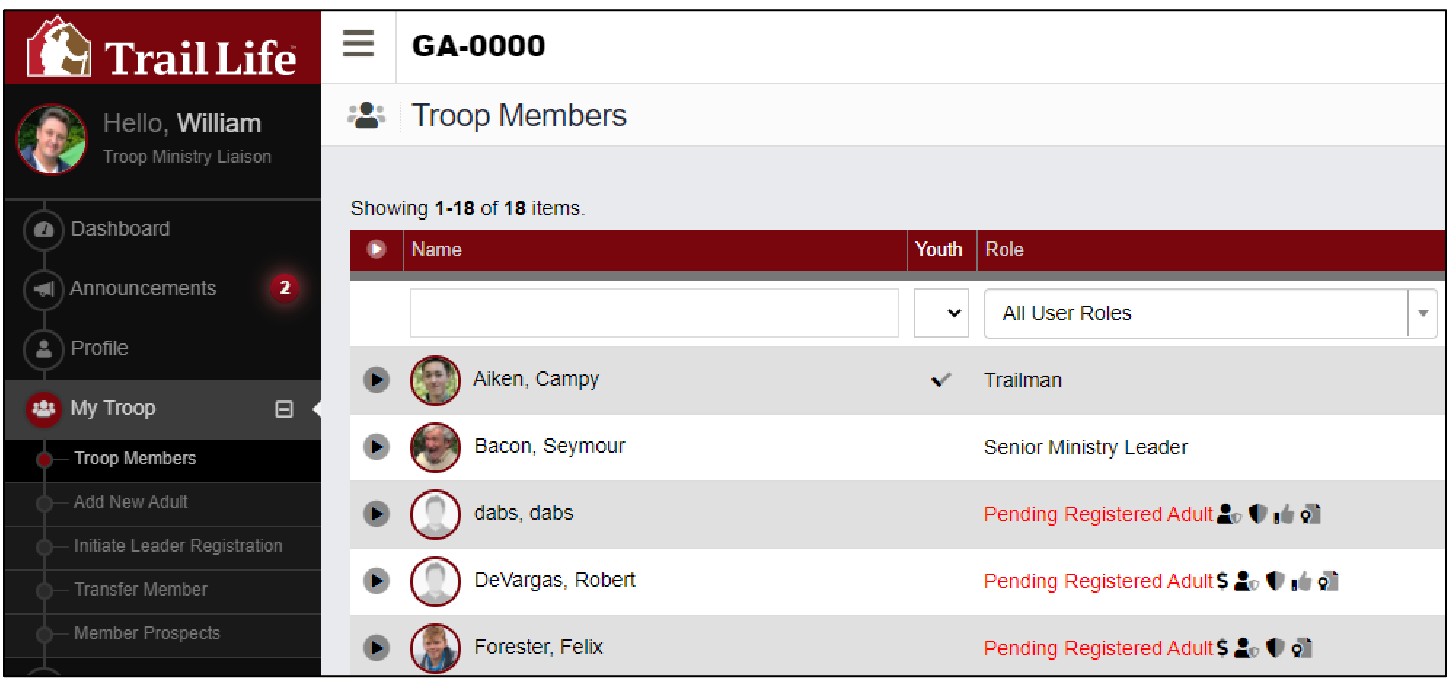


Figure Ia

Above the Troop Members list, and columns, are some other tools you can use with your Troop Members list (*See* ***Figure Ib***):

- Select "All" to show all Troop members on one page (if you have more than 25)
- Select "Show only new members" to only display accounts added within the last 30 days
- Select "Toggle additional data" to toggle to a different view and display additional profile fields
- Select the "Reset Filters" arrow to clear filters and return to the default view
- Select the Excel icon or CSV icon to export the displayed Troop list to an Excel or CSV file
- Select the "Bulk Member Actions" button to make bulk changes to Level, Patrol or Grade (*Visit the TLC Help menu for more information on the Bulk Member Actions tool)

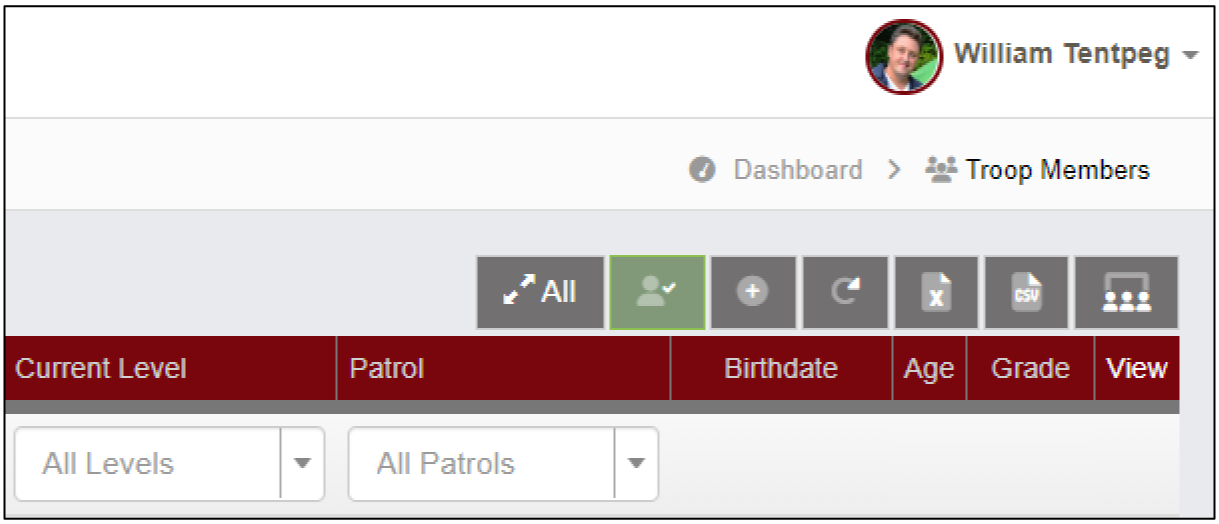
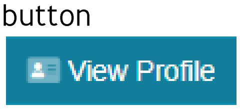


Figure Ib

Member Profiles

To view a Troop member profile, you can access the profile using one of two methods:

1. Click the profile card within the list, located on the far right, under the *View* column

2. Click the arrow to the left of the member's name to expand for a preview, then click the blue "View Profile" button
 

When you are viewing a member profile, if your role has permissions to do so, you can click the "Update Profile" button if there are any updates that need to be made to the profile. Level, patrol, and grade changes can be made in youth profiles as well as typical name, email and address fields for every member.

Under the *Households* section of a member profile, you can choose to add an additional parent or guardian to the existing Household. Adding another son is also possible under the *Households* section, though it is not recommended for the TML. (Adding a son will involve signing the "Consent, Waiver, and Release Agreement" as part of their membership – ideally, this should be completed by the parent and not the TML.) The option for adding a son is also available within every adult profile, giving them the ability to manage their own Household. The other names listed under the Household can be clicked to quickly jump to that member's profile, without having to go back to the overall Troop Members list. (*See **Figure Ic**.*)

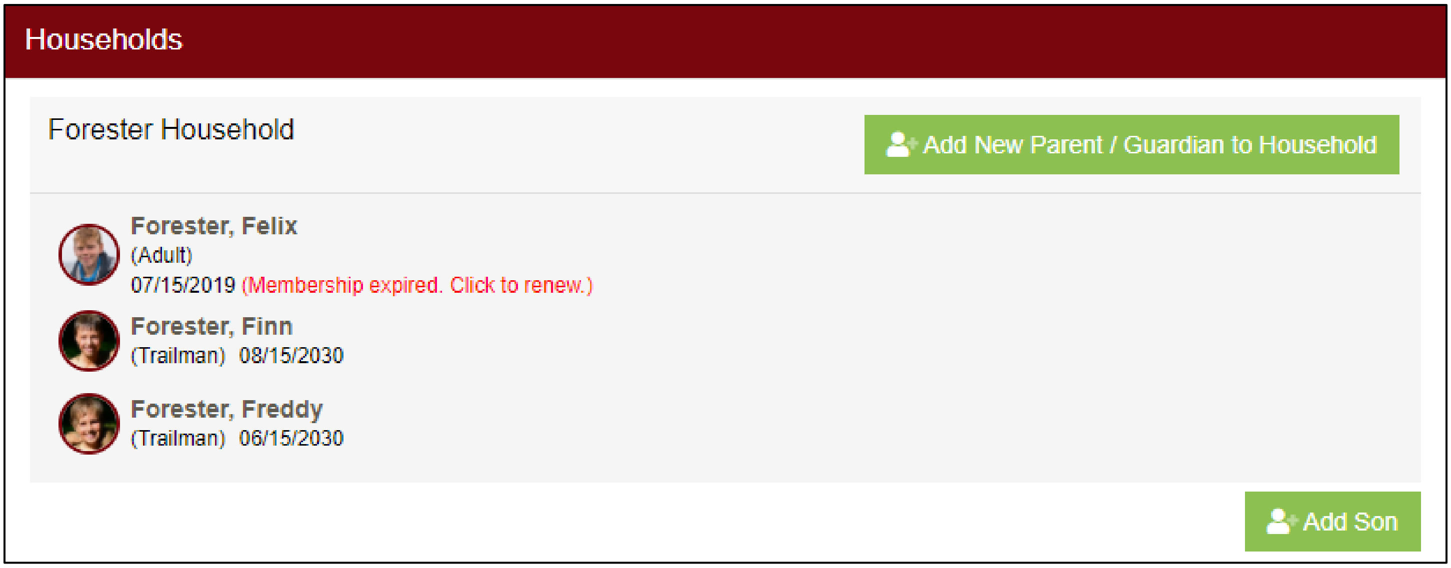


Figure Ic

Also, when viewing a member profile, the TML (and possibly a custom role with permissions) will see the *Member Tools* section where roles can be added or removed, a Household reassignment can be made, or the member account can be deactivated. (*See **Figure Id**.*)

*Deactivated members will no longer appear on your Troop roster, and they will not be able to log in to Trail Life Connect. If a member is deactivated inadvertently, or if they were deactivated for a season but are coming back to engage in the Troop after a hiatus, a request can be sent to Trail Life Connect support for re-activating the member profile. Many times a Troop will attempt to add a "new" adult and receive an error message that the email address is already in use. This typically means the account is currently deactivated and will simply need to be re-activated by TLC support. When an account is deactivated, all member information is retained, including former roles and any youth advancement information.

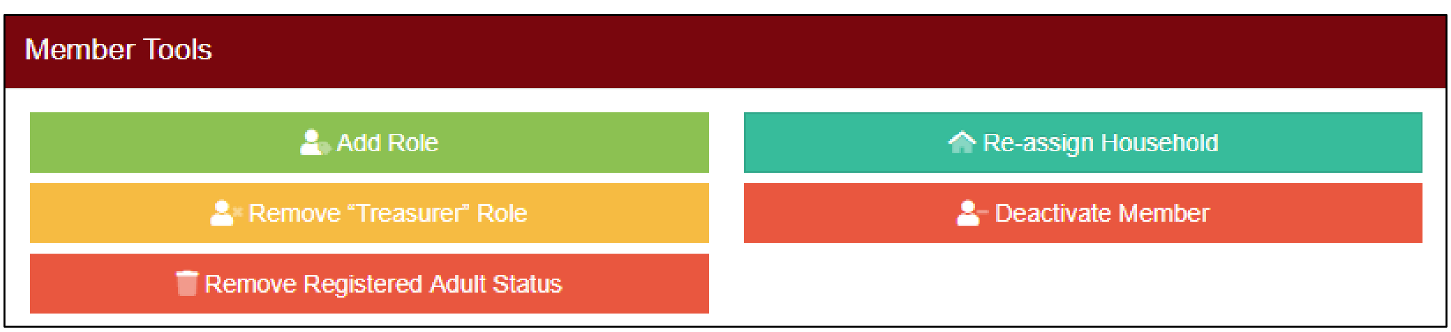


Figure Id

Add New Adult

Clicking the “Add New Adult” option under “My Troop” (left menu) results in a page for registering new adults with your Troop. Before a youth member can be added to the Troop, a parent or guardian must first establish a system account.

Before an adult can be invited to hold a registered leadership role within the Troop, they must also first establish a system account. The *Register new adults with your Troop* page offers 4 different options for adding adults to the Troop. (Visit the TLC Help menu where these 4 system registration options are covered in greater detail.)

(*See **Figure Ia**.*)

Initiate Leader Registration

Clicking “Initiate Leader Registration” will bring you to a page where you can invite any Parent/Guardian members of your Troop to become a Registered Adult. Select the name of the Parent/Guardian from the list of available candidates, review the invitation email content (only editing if necessary,) and click to send the invitation email to that individual. (*See **Figure Ie**.*) If necessary, the TML can re-send the invitation by going into the invited member profile and clicking the corresponding button under the *Member Tools* section. (*See **Figure If**.*)

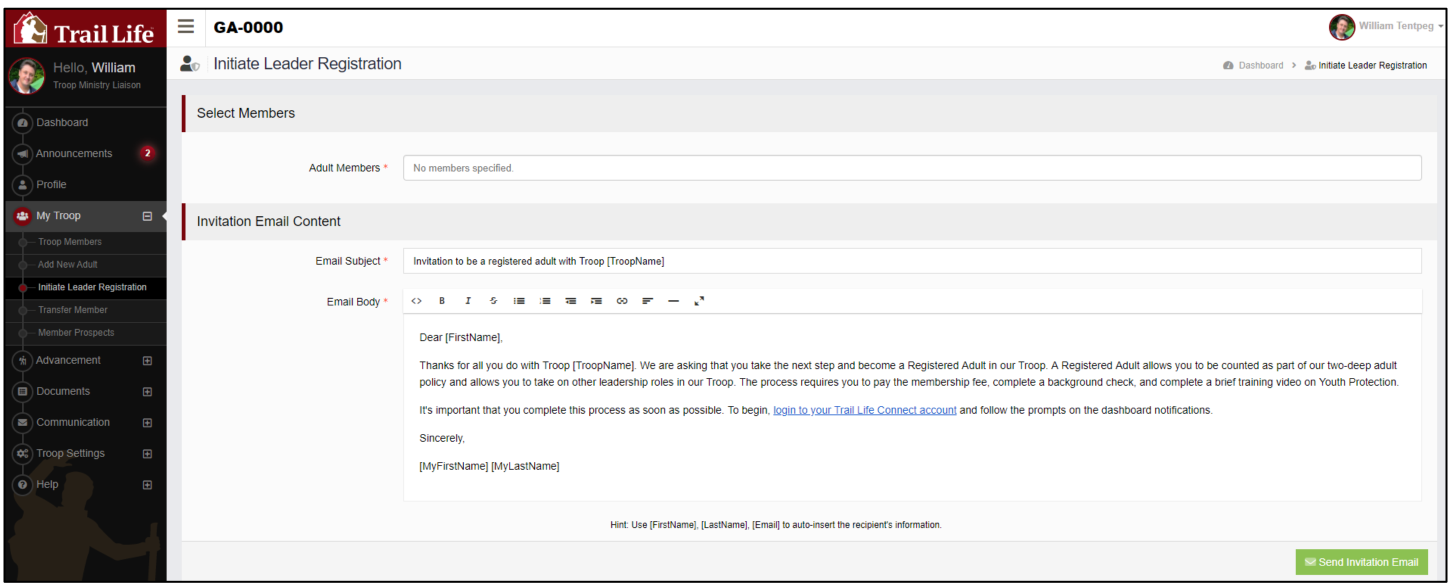


Figure Ie

Figure If

Transfer Member

The TML and Troopmaster also have the permission to transfer a member into their Troop. (*See* ***Figure Ig.***) *Important to note: member transfers must always be initiated by the receiving Troop. You cannot transfer a member out to a different Troop – a member must be invited to transfer into *your* Troop.

To invite a member to transfer into your Troop, you will need to know the member's last name and their email address *or* Member ID. You will also need to specify if you are only transferring that particular member or if you are transferring the entire Household. Once the 3 requested items are complete, click the "Initiate Transfer & Send Email" button. The specified member will receive an email with a link to accept the transfer request. Upon their acceptance, the transfer will complete and they (as well as the rest of their Household, if applicable) will then appear on your Troop roster.

*Adults who held any specific leader roles in another Troop will not transfer in with those roles, but will start out with the base role of Parent/Guardian. Prior adult leaders will not lose any items completed towards registration (i.e. their membership payment renewal date, Criminal Background Check date and Youth Protection Training date will all still be intact as part of their profile.) The receiving Troop can decide whether to change their role back to being a registered leader by clicking "Initiate Leader Registration" via the left menu.

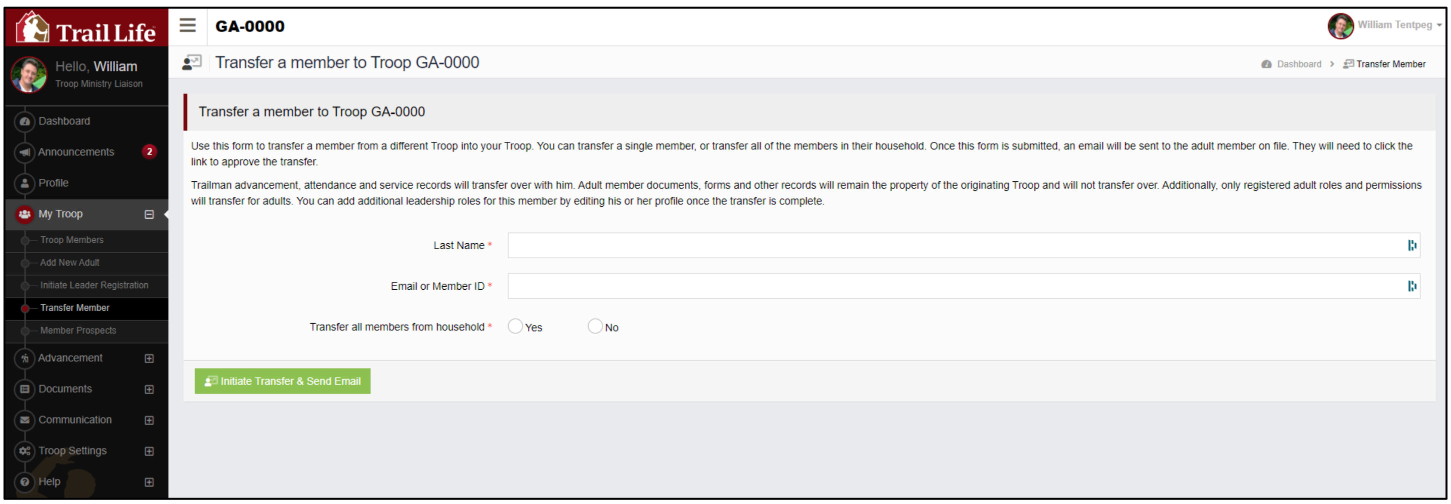


Figure Ig

Member Prospects

The *Member Prospects* page is a location/tool to manage individuals who are potentially interested in joining your Troop. These prospects will often come via the Find a Troop map on the Trail Life website, as prospects search for a Troop and then submit an inquiry. Prospects can also be added manually from the *Troop Member Prospects* page by clicking the "Add New Prospect" button and entering the relevant information. (Visit the TLC Help menu for more detailed information about the Find a Troop map, as well as further instruction and details on the Member Prospects tool.)