Building Requirement Trees and Using the Requirement Library

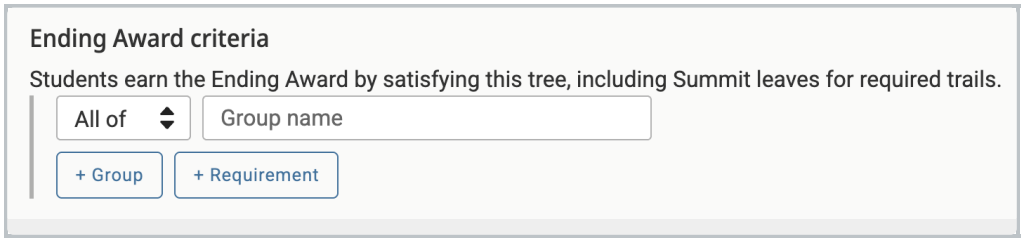
A requirement tree defines what a student has to do to complete part of a curriculum. The tree is built from groups and requirements. Groups decide how many of the items inside them a student must finish. Requirements are the individual things a student does, such as earning a badge or attending events.

You build requirement trees in three places: in the Ending Award criteria of a curriculum, inside a track, and in the Requirement Library. The tree editor works the same way in each. This article explains how to build a tree and how to use the Requirement Library to keep reusable trees.

> **Security Note**
>
> The Requirement Library, like the rest of the Curricula area, requires the **Manage Curricula** permission. Making changes requires the **Full Control** permission level.

Parts of a Tree

Every tree starts with a top-level group. Inside it you can add more groups and requirements. A group can hold both. Groups inside groups let you build rules such as "complete all of these, and any one of those.



Group Types

Click **+ Group** at the bottom of a group to add a new group inside it. A new group starts as **All of**.
Choose the group type from the dropdown at the left of the group:

- **All of** — The student must complete every item in the group.
- **Any of** — The student must complete at least one item in the group.
- **N of** — The student must complete a set number of the items. A number box appears beside the dropdown. Enter how many items are required. The number must be at least 1.

When a student sees their progress, the groups are described as "Must complete all directly below," "Complete any directly below," and "Complete [n] of the items directly below."

Click **Remove** beside a group to delete it, along with anything inside it. The top-level group cannot be removed.

Requirement Types

Click **+ Requirement** to add a requirement. A new requirement starts as the **Badge** type.

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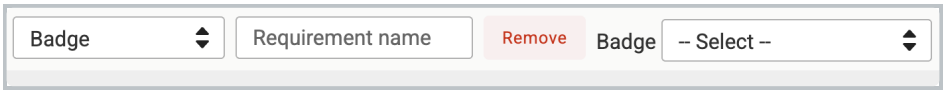
Choose the requirement type from the dropdown at the left of the requirement. Changing the type clears the settings you had entered for the previous type.

Every requirement also has optional **Start** and **End** date and time fields. Use them to limit when the requirement can be satisfied. Leave them empty for no limit. Once saved, the dates appear on the requirement as **From** and **To**.

Click **Remove** beside a requirement to delete it, along with anything inside it.

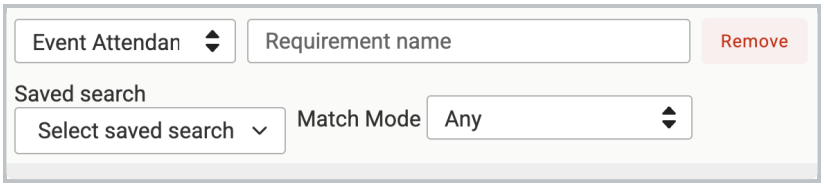
Badge

The student must earn a badge. Under **Badge**, choose the badge from the dropdown, which lists the badges in your system.



Event Attendance

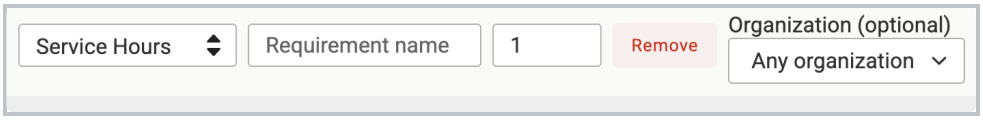
The student must attend events. The events are defined by a saved event search.



- **Saved search** — Choose the event search that finds the qualifying events.
- **Match Mode** — Choose how many of the matching events the student must attend: **Any** (default), **All**, or **N of**.
- **Required Events** — Appears when Match Mode is **N of**. Enter the number of events required, at least 1.

Service Hours

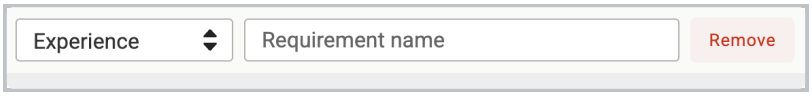
The student must complete service hours.



- **Threshold** — The number of hours required, at least 1. This box is beside the name field.
- **Organization (optional)** — Limit the hours to one organization. Leave it as **Any organization** to count hours at any organization.

Experience

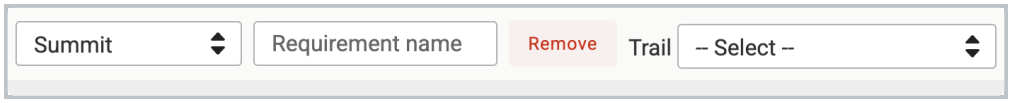
The student must submit an experience. An experience is something a student reports for review, such as an internship or a project. This type has no extra settings beyond the name and the optional dates.



Summit

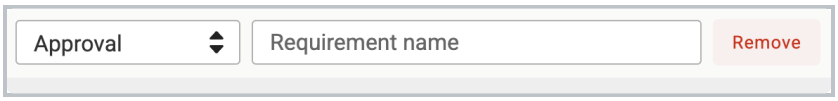
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The student must complete a trail. Under **Trail**, choose the trail from the dropdown. The dropdown lists the cohort's trails that are not disabled. It is empty while you are creating a new curriculum, because trails are added to a cohort afterward. Add Summit requirements from the Curriculum Editor or the Requirement Library.



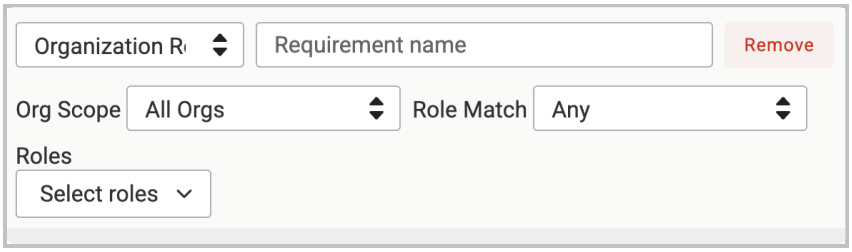
Approval

The student needs an approval. This type has no extra settings beyond the name and the optional dates.



Organization Role

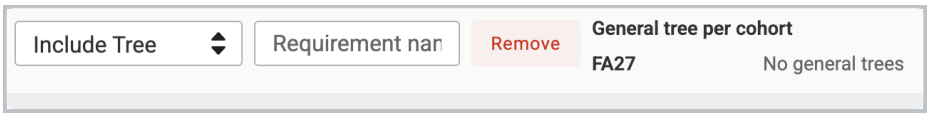
The student must hold a role in an organization.



- **Org Scope** — **All Orgs** (default) counts a role in any organization. **Specific Orgs** limits it to the organizations you choose.
- **Role Match** — **Any** (default), **All**, or **N of**, meaning how many of the chosen roles the student must hold.
- **Required Roles Threshold** — Appears when Role Match is **N of**. Enter the number of roles required, at least 1.
- **Roles** — Select one or more organization roles.
- **Organizations** — Appears when Org Scope is **Specific Orgs**. Select one or more organizations.

Include Tree

An Include Tree requirement pulls in another tree from the Requirement Library, so you do not have to build the same requirements again. When the included tree is a General tree, any curriculum can reuse it.



- Under **General tree per cohort**, each cohort the tree applies to is listed with a dropdown. Choose the General tree to include for that cohort. If a cohort has none, it reads **No general trees**.
- When there are two or more cohorts, a **Match by code** button appears once you have picked a tree for one cohort. It chooses the tree with the same code in each of the other cohorts.

Only General trees in the same cohort can be included, and a tree cannot include itself. If a tree breaks these rules, saving is stopped with an error.

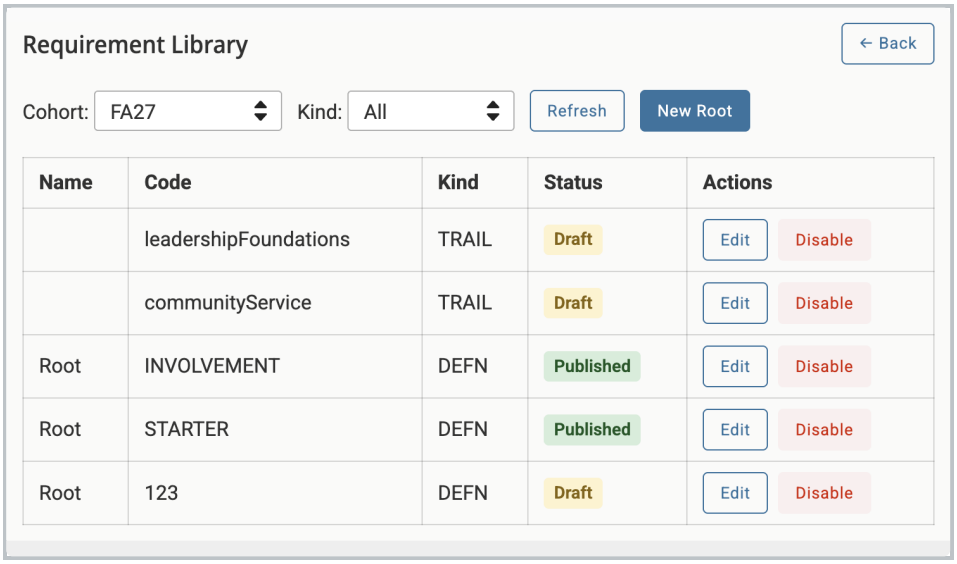
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Saving and Publishing Trees

- When a tree is part of a curriculum, it is published with the curriculum after saving.
- A tree must have at least one requirement before it can be published, and a published tree cannot be saved with no requirements.
- When you save a tree that is already published. Saving will affect active students and will not be applied retroactively.

The Requirement Library

The Requirement Library stores the requirement trees for a cohort in one place. It holds the trees behind your curricula and tracks, and it also holds General trees that you can include in other trees. To open it, click **Requirement Library** at the top of the Curricula page.



Under **Cohort**, choose a cohort. If you picked a cohort on the Curricula page, it is already chosen.

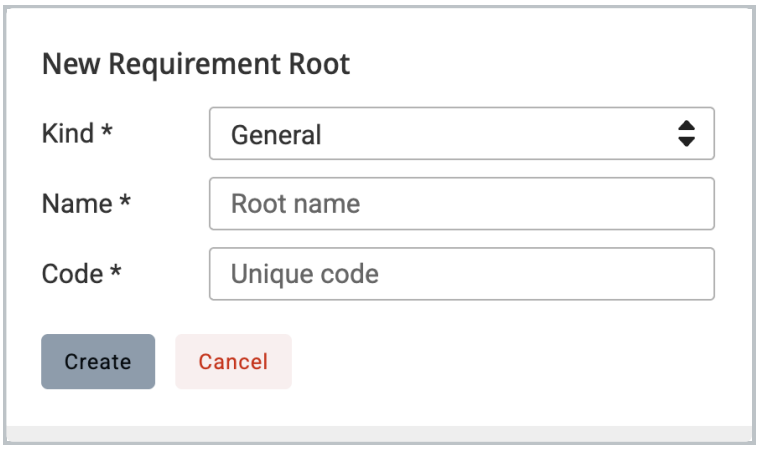
Optionally, use **Kind** to narrow the list to **General**, **Curriculum**, **Trail**, or **Track** trees. The default is **All**.

Click **Refresh** to reload the list.

The table lists each tree's **Name**, **Code**, **Kind**, and **Status** (**Draft** or **Published**). Click **← Back** to return to the Curricula page.

Creating a Tree

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1. Choose a cohort, then click **New Root**.
2. In the **New Requirement Root** dialog, choose the **Kind** (required): **General**, **Curriculum**, **Trail**, or **Track**.
3. Enter a **Name** (required) and a **Code** (required). The code must be unique among trees of the same kind in the cohort.
4. Click **Create**. The new tree opens in the editor. Click **Cancel** to close the dialog.

Choose **General** for a tree you plan to include in other trees with an Include Tree requirement.

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