

Girl Scouts San Diego Service Unit Team Looker and Excel Guide

How-To Make Good Use of Service Unit Reports



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Introduction

Looker is an online tool that provides current (within one business day) membership information for Girl Scout volunteers to provide the best possible service and support to our members world-wide. As a volunteer supporting local Girl Scout troops, events, or functions, you've been provided access to Looker as a means to deliver this support and ensure girls fulfill our mission. Thanks for respecting the sensitivity of the information by not sharing your log-in information or downloading full reports and sharing them with others without local council authorization.

Looker enables service unit teams to ensure local volunteers and girl participants have current memberships and provides detailed membership information to inform planning and participation in local events or trainings.

Definition of Terms	
Service Unit	A portion of a council's geographic area or group of troops/groups in that area. Also can be known as neighborhood, community, village, or area.
Administrative Volunteer	A volunteer who oversees a function or specific area of council operations (i.e. service unit team members).
Troop	A group of girls with adult leadership engaging in the Girl Scout Leadership Experience.
Looker	Online tool for Girl Scout Council staff and volunteers to access current membership data & reports.
Girl Scout Membership Year	October 1-September 30
Personally Identifiable Information (personal data)	The name, address, email address, date of birth, or other unique information relevant to a member or potential member. Treat this with respect for others' privacy.
Approved Volunteer	A member who has passed the designated screening (background, credit, interview or, other) for a specfic Girl Scout volunteer role.

Call out: Looker is available to volunteers approved by Girl Scouts San Diego. Volunteers with access to Looker have:

- received training •
- completed an approved background check
- signed a non-disclosure agreement

Do not share log-in information or Looker access with any volunteer who has not met these criteria. Please contact your service unit support specialist with any questions about this topic.



Confidentiality Agreement Girl Scouts San Diego

This confidentiality agreement should be signed by anyone accessing personal and confidential information within 'Looker' and applicable Girl Scout data-stores, where no equivalent agreement is in enforcement.

By signing this statement, I am indicating that I understand my responsibilities to maintain confidentiality and agree to the following:

- 1. I will access data only for the agreed purpose for which I am authorized explicitly. On no occasion will I use this data, including personal or confidential information, for my personal interest or advantage, or for any other business purposes.
- 2. I will maintain the privacy and confidentiality of all accessible data and understand that unauthorized disclosure of personal/confidential data is an invasion of privacy and may result in my volunteering role with Girl Scouts San Diego being terminated with immediate effect, plus civil and/or criminal actions against me.
- 3. I understand that where I have been given access to confidential information I am under a duty of confidence and would be liable under common law for any inappropriate breach of confidence in terms of disclosure to third parties and also for invasion of privacy if I were to access more information than that for which I have been given approval or for which consent is in place.
- 4. I will not disclose confidential or personal data or information to anyone other than those to whom I am authorized to do so.
- 5. All personal or confidential information will be kept secure while in my custody and no copies (downloads, screen captures/recordings, etc.) or notes containing personal identifiable information will be retained by me on completion of the agreed duties.
- 6. I understand that my access and activity within Looker and applicable Girl Scout data-stores will be logged and may be audited by Girl Scouts San Diego or GSUSA.
- 7. I agree to notify Girl Scouts San Diego immediately should I become aware of an actual breach of confidentiality or a situation which could potentially result in a breach, whether this be on my part or on the part of another person.
- 8. If in doubt about any aspect of handling confidential or personal information, I will check with the assigned Girl Scouts San Diego staff member.
- 9. Should my work in relation to the agreed duties discontinue for any reason, I understand that I will continue to be bound by this signed Confidentiality Agreement.



Confidentiality Agreement Girl Scouts San Diego

Confidentiality Declaration

To be completed by the individual:

I have read and understood the conditions and undertake to comply with them when accessing personal and confidential information.

Signature:	_ Date://
Name:	

To be completed by Girl Scouts San Diego Staff:

Signature:	Date:	//	
Name:			
Title:			

A copy of this signed sheet should be kept by the individual and the original saved on file by Girl Scouts San Diego.

A Note on Confidentiality

As service unit team members, you are the keepers of confidential information. Be diligent in complying with your position responsibilities.

So, what can you share with other team members?

Adult volunteer's information only – Adult Volunteer's name, email address, phone number, troop number, grade level, and number of girls in the troop. Adult volunteers understand that their email addresses will be shared for Girl Scout email information only.

Girl and family contact information should only be shared with troop leaders.

The Four Basic Looker Dashboards

Reports	Can be useful for:
Full Roster	 organizing information about service unit membership identifying troops that are not meeting troop membership guidelines (i.e. Do troops have two background checked or unrelated adults in the troop leader and/or assistant leader role?) creating contact lists for specific service unit projects or events monitoring membership registration and renewals looking for trends in membership participation (i.e. schools, grade levels, troop adult roles, etc.)
Membership Analysis	 tracking membership renewal by the numbers year over year looking for trends in membership types, troop adult roles, of girls' grade levels sharing general service unit membership information with other volunteers without sharing the personal information of troops or Girl Scout members
New in the Last Two Weeks	 identifying the volunteers who have recently accepted or moved into a new position (When a volunteer changes positions, this adjustment is shown on the New in the Last Two Weeks report.) confirming the contact information of new troop leaders to assist in new leader outreach looking for new troops that recently launched, or troops that have added new members
Troop Details	 identifying the troops that are open or closed on the Opportunity Catalog gathering basic troop information at a glance confirming troop meeting information with troop leaders and assistant leaders, then sending updates to <u>customercare@sdgirlscouts.org</u>

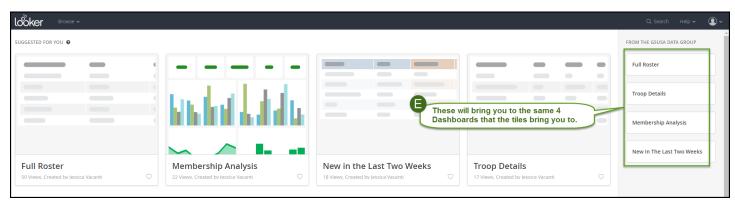
Navigating the Looker HOME Page

Always click on the top left hand side of any screen to return to Looker's HOME page.

HOME page:

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= = :			:	Full Roster
	to ball date			Troop Details
				Membership Analysis
				New In The Last Two Weeks
Full Roster	Membership Analysis	New in the Last Two Weeks	Troop Details	

Sidebar of the HOME page. Each section will bring you to the same 4 Dashboards that the tiles will bring you to.



A. Full Roster

The Service Unit Full Roster offers the complete information of every member of the service unit. This report may be most useful for:

- organizing information about service unit membership
- identifying troops that are not meeting troop membership guidelines
 - (i.e. Do troops have two background checked or unrelated adults in the troop leader and/or assistant leader role?)
- creating contact lists for specific service unit projects or events
- monitoring membership registration and renewals
- looking for trends in membership participation (i.e. schools, grade levels, troop adult roles, etc.)

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							Full Ro	oster (ba	sed on yea	r in filter)										:
Service Unit	Troop/Group	Membership Type	Position	First Name	Last Name	Email	Does member allow email?	Phone Number	Address Line 1	City	State Name (Abbr.)	Zip Code	Name (School)	Girl Grade	Position Active Date \checkmark	Status	Expiration Date	Preferred Contact First Name	Preferred Contact Last Name	Does membe allow photograph?	- 1
1 SU209	Troop01640	Adult Membership	Troop Chaperone/Driver				Y			Chapel Hill	NC	27516	Not Applicable	Adult	2018-08-30	Eligible	2022-08-29			Y	
2 SU209	Troop00693	Adult Membership	Troop Co-Leader	-			Y			Rougemont	NC	27572	Not Applicable	Adult	2018-08-28	Eligible	2022-07-28			Y	
3 SU209	Troop01892	Adult Membership	Troop Chaperone/Driver	_			Y			Durham	NC	27705	Not Applicable	Adult	2018-08-28	Eligible	2020-09-07			Ν	
4 SU209	Troop01892	Girl Membership	GIRL	-	_		Y			Durham	NC	27705	School Not Found	Grade 02	2018-08-28	NOT APPLICABLE	ø			Y	

Full Roster webpage filters

1. Filter on year (Last Year, Current Year, or Next Year)

^{su Roster} ~ Full Roster ♡			
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Year	is equal to	Current Year	×
		Last Year	
Service Unit	is equal to	Current Year	
		Next Year	
Troop or Group	is equal to	‡	

2. Filter on service unit (one or more depending on roles held)

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3. Filter on troop or group

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1	SU209	Troop01640		Adult Membership	Troop00714	+
2	511200	Troop00607		Adult	4	۱.

4. Click RUN to see filters get applied

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Troop or G	Sroup	is equal to	\$ Troop	01112 ×		τ +														
							F	ull Roste	r (based on	year in	filter)									
Service Unit	Troop/Group	Membership Type	Position	First Name	Last Name	Email	Does member allow email?	Phone Number	Address Line 1	City	State Name (Abbr.)	Zip Code	Name (School)	Girl Grade	Position Active Date \vee	Status	Expiration Date	Preferred Contact First Name	Preferred Contact Last Name	Does member allow photograph?
SU209	Troop01112	Adult Membership	Camp Certified Adult				Y			Durham	NC	27713	Not Applicable	Adult	2018-08-08	Eligible	2021-03-09	Jennifer	Hemmerlein	Y
SU209	Troop01112	Girl Membership	GIRL				Y			Durham	NC	27713		Grade 01	2017-11-07	NOT APPLICABLE	ø	Sarah	Ray	Y

Full Roster: Sort and Filter the Data

The Full Roster in this section has been simplified to protect volunteer information and for ease of demonstration.

1. **Open the roster.** At first, you will see a ton of information. Start by looking at the top row to see the categories the information is grouped under:

A	В	С	D	E	F	G	н	1	J	к	L	M	N	0	Р
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								Does member				Name			
	Service Uni	t Troop/Group	Membership Type	Position	First Name	Last Name	Email	allow email?	Phone Number	Address Line 1	City	(Abbr.)	Zip Code	Name (School)	Girl Grade
	1 SUxxx	Camp Membership	Girl Membership	GIRL				Y			Lakeside	CA	92040	School Not Found	Grade 05
	0.011	Teene02261	Gid Mambarship	CIRI				v			Care Diago	C.4	62120	Elementary School C	Condo OE
_															
	3 SUxxx	Independent Member	Girl Membership	GIRL				Y			Lakeside	CA	92040	High School B	Grade 10
	4 SUxxx	Troop08751	Adult Membership	4Her Troop Helper				Y			Poway	CA	92064	Not Applicable	Adult
	5 SUxxx	Troop02760	Girl Membership	GIRL				Y			San Diego	CA	92130	Home Schooled	O Grade K
	6 SUxxx	Troop08751	Girl Membership	GIRL				Y			San Diego	CA	92128	Elementary School B	Grade 02

The Full Roster includes information regarding:

service unit, troop/group, membership type, position, name, contact information, school, and grade

Two other types of information are offered to the far right (not pictured):

- background check information for adult volunteers
- photograph permissions



Call out: Volunteer background checks must be renewed every three years. Volunteers with expired background checks will also receive the link to renew their background check at the time they renew their membership for the next year.

You can also delete columns you do not find useful. Just "right click" at the top of the column and click "Delete."

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iber	Adult Membe	ership	4Her Troop Helper				<u> </u>		Paste Special	
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2. Sort the roster.

Begin by selecting "Custom Sort" from the HOME tab.

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			Troop Leader/Advisor					San Diego			Not Applicable	Adult	2018-1	1-12	кеарріў	-11-11
4 SUxxx	Independent Member	Adult Membership	4Her Troop Helper					San Diezo	CA	92128	Not Applicable	Adult	2018-1	L-27 Elie	ible 2	2021-02-28

Add two levels to make three levels total and use the drop down menus to set the sort fields as shown. Then click "OK."

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oop02747	Adult	Membership	Adult Memb	pers			Y		
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op08090	Adult	Membership	Adult Memb	bers			Y		
			GIRL				Y		

Now, you can scroll through the roster to identify:

- independent members, camp members, or members "Seeking a Troop"
- service unit team members
- adult and girl members in each troop

1													ľ
39 5	Uxxx	Independent Member	💾 Notic	e vou can sc	roll through the roster a	nd	CA	92064	Not Applicable	Adult	1997-10-01	NOT APPLICABLE	
40 s	Uxxx	Independent Member		•	mbers by troop/group.		CA	92128	Not Applicable	Adult	1995-10-01	NOT APPLICABLE	
41 s	Uxxx	Independent Member		JIT SCOULTIE	mbers by troop/group.		CA	92128	Not Applicable	Adult	1995-10-01	NOT APPLICABLE	
42 \$	Uxxx	SUxxx Campaign	Adaretmentoeramp	memorramp necroiter - mgmana			CA	92128	Not Applicable	Adult	2018-03-27	Eligible	2020-10-05
43 \$	Uxxx	SUxxx Campaign	Adult Membership	SU Activity Consultant		Poway	CA	92064	Not Applicable	Adult	2018-09-26	Eligible	2021-12-11
44 5	Uxxx	SUxxx Campaign	Adult Membership	SU Product Sales - Cookies		San Diego	CA	92128	Not Applicable	Adult	2018-05-29	Eligible	2021-03-07
45 \$	Uxxx	SUxxx Campaign	Adult Membership	SU Product Sales - Cookies		San Diego	CA	92128	Not Applicable	Grade Unknov	2018-05-29	Eligible	2021-04-30
46 \$	Uxxx	SUxxx Campaign	Adult Membership	SU Product Sales - Fall		San Diego	CA	92128	Not Applicable	Adult	2017-09-06	Eligible	2020-09-06
47 s	Uxxx	SUxxx Campaign	Adult Membership	SU Recognitions		San Diego	CA	92128	Not Applicable	Adult	2018-10-01	NOT APPLICABLE	
48 \$	Uxxx	SUxxx Campaign	Adult Membership	SU Registrar		San Diego	CA	92128	Not Applicable	Adult	2018-08-22	Eligible	2021-10-03
49 \$	Uxxx	SUxxx Campaign	Adult Membership	SU SHARE Coordinator		Poway	CA	92064	Not Applicable	Adult	2018-08-27	Eligible	2020-06-11
50 \$	Uxxx	SUxxx Campaign	Adult Membership	SU Treasurer		San Diego	CA	92128	Not Applicable	Adult	2018-05-29	Eligible	2021-04-16
51 \$	Uxxx	Troop02007	Adult Membership	4Her Troop Helper		San Diego	CA	92128	Not Applicable	Adult	2019-01-31	Eligible	2022-01-30
52 \$	Uxxx	Troop02007	Adult Membership	4Her Troop Helper		San Diego	CA	92128	Not Applicable	Adult	2018-12-11	Eligible	2020-08-24
53 \$	Uxxx	Troop02007	Adult Membership	4Her Troop Helper		San Diego	CA	92128	Not Applicable	Adult	2017-12-18	Eligible	2020-12-17
54 \$	Uxxx	Troop02007	Adult Membership	4Her Troop Helper		San Diego	CA	92128	Not Applicable	Adult	2017-10-24	Eligible	2020-10-23
55 \$	Uxxx	Troop02007	Adult Membership	Adult Members		San Diego	CA	92128	Not Applicable	Adult	2018-08-16	Expired	2018-10-05
56 \$	Uxxx	Troop02007	Adult Membership	Adult Members		San Diego	CA	92128	Not Applicable	Adult	2017-08-06	Eligible	2020-10-23
57 5	Uxxx	Troop02007	Adult Membership	Troop Assistant Leader/Advisor		Poway	CA	92064	Not Applicable	Adult	2017-08-31	Eligible	2021-09-30
58 \$	Uxxx	Troon02007	Adult Membershin	Troop Cookie Manager		San Diego	CA	92128	Not Applicable	Adult	2018-12-06	Fligible	2020-10-23

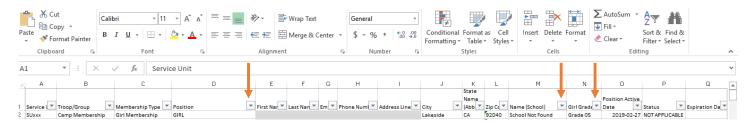
3. Filter the roster.

Now that the roster is sorted by troop, you can filter the roster to only show members of a designated category.

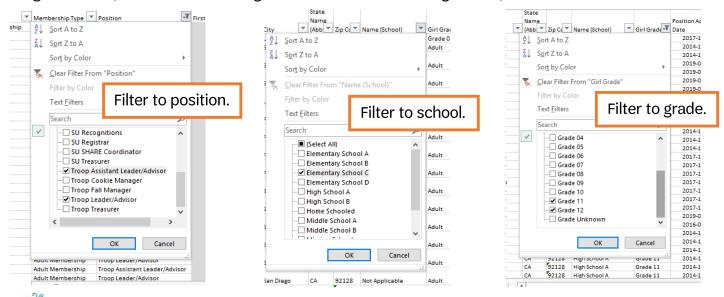
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ervice Unit	Troop/Group	Membership Type	Position	First Name	Last Name	Email Ph	one Number	Address Line 1	City	Name (Abbr.)	Zip Code	Name (School)	Girl Grade	osition Active ate	Clear	Dat
Uxxx	Camp Membership	Girl Membership	GIRL						Lakeside	CA		School Not Found	Grade 05	2019-02-27	🍢 Reapply	
Jxxx	Camp Membership	Lifetime Membership	Troop Leader/Advisor						San Diego	CA	92110	Not Applicable	Adult	2018-11-12		-11-
Jxxx	Independent Member	Adult Membership	4Her Troop Helper						San Diego	CA	92128	Not Applicable	Adult	2018-11-27	Eligible 20	2 -02

Notice, drop down menus appear at the top of each column. You can open the drop down menu and select the categories that you wish to display. Common filters include:



- position (i.e. troop leader/assistant leader, TCM, troop treasurer, etc.)
- by school (i.e. see how many Girl Scouts attend each school in your community)
- grade level (i.e. all Girl Scouts in grade 5 or all Girl Scouts in grade 12)



Call out: Grade 5 is a big year of transition for troops. It is important to connect with troops bridging from Juniors to Cadettes early and support their members as they decide next steps.

B. Membership Analysis

The Service Unit Membership Analysis offers visuals and charts that can help you make quick sense of the membership in your service unit. This report may be most useful for:

- tracking membership renewal by the numbers year over year
- looking for trends in membership types, troop adult roles, or girls' grade levels
- sharing general service unit membership information with other volunteers without sharing the personal information of troops or Girl Scout members

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	the deal state in			Troop Details
	NERRETAR			Membership Analysis
				New In The Last Two Weeks
Full Roster 50 Views, Created by Jessica Vacanti	Membership Analysis	New in the Last Two Weeks 18 Views, Created by Jessica Vacanti	Troop Details 17 Views, Created by Jessica Vacanti	

Membership Analysis webpage filters

Filters are the same as the filters on the Full Roster Dashboard:

- 1. Filter on year (Last Year, Current Year, or Next Year)
- 2. Filter on service unit (one or more depending on roles held)
- 3. Filter on troop or group
- 4. Click RUN to see filters get applied

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✓ FILTERS				
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C. New in the Last Two Weeks

The New in the Last Two Weeks report offers a glimpse of the new members to the service unit. This report may be most useful for:

- identifying the volunteers who have recently accepted or moved into a new position
 - (When a volunteer changes positions, this adjustment is shown on the New in the Last Two Weeks report.)
- confirming the contact information of new troop leaders to assist in new leader outreach
- looking for new troops that recently launched, or troops that have added new members

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Full Roster 50 Views, Created by Jessica Vacanti	Membership Analysis 22 Views, Created by Jessica Vacanti	New in the Last Two Weeks	Troop Details 17 Views, Created by Jessica Vacanti	

New in the Last Two Weeks webpage filters

Filters are the same as the filters on the Full Roster Dashboard:

- 1. Filter on year (Last Year, Current Year, or Next Year)
- 2. Filter on service unit (one or more depending on roles held)
- 3. Filter on troop or group
- 4. Click RUN to see filters get applied

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Service Unit	is equal to	€ SU208 × SU209 × SU215	× +						
Troop or Group	is equal to	•	T +						
Campion Main	T	Desision	Manhar Tura	st Two Weeks (b			Desiring Asting Data V	Ferral I	D
	Troop/Group	Position	Member Type First	City	Girl Grade	Name (School)	Position Active Date V	Email	Does member allow email?
5U209	Troop01640	Troop Chaperone/Driver	Adult	City Chapel Hill	Girl Grade	Name (School) Not Applicable	2018-08-30	Email	Does member allow email? Y
5U209 5U209	Troop01640 Troop00693	Troop Chaperone/Driver Troop Co-Leader	Adult Adult	City Chapel Hill Rougemont	Girl Grade Adult Adult	Name (School)	2018-08-30 2018-08-28	Email	Does member allow email? Y Y V
5U209 5U209 5U209	Troop01640 Troop00693 Troop01892	Troop Chaperone/Driver Troop Co-Leader GIRL	Adult Adult Girl	City Chapel Hill Rougemont Durham	Girl Grade Adult Adult Grade 02	Name (School) Not Applicable Not Applicable	2018-08-30 2018-08-28 2018-08-28	Email	Does member allow email? Y Y Y Y
5U209 5U209 5U209 5U209	Troop01640 Troop00693	Troop Chaperone/Driver Troop Co-Leader	Adult Adult	City Chapel Hill Rougemont Durham Durham	Girl Grade Adult Adult	Name (School) Not Applicable	2018-08-30 2018-08-28	Email	Does member allow email? Y Y Y Y Y
5U209 5U209 5U209 5U209 5U209 5U209	Troop01640 Troop00693 Troop01892 Troop01892	Troop Chaperone/Driver Troop Co-Leader GIRL Troop Chaperone/Driver	Adult Adult Girl Adult	City Chapel Hill Rougemont Durham	Girl Grade Adult Adult Grade 02 Adult	Name (School) Not Applicable Not Applicable	2018-08-30 2018-08-28 2018-08-28 2018-08-28 2018-08-28	Email	Dees member allow email? Y Y Y Y Y Y Y
5U209 5U209 5U209 5U209 5U209 5U209 5U209	Тгоор01640 Тгоор00693 Тгоор01892 Тгоор01892 Тгоор01892	Troop Chaperone/Driver Troop Co-Leader GIRL Troop Chaperone/Driver GIRL	Adult Adult Girl Adult Girl	City Chapel Hill Rougemont Durham Durham Cary	Girl Grade Adult Adult Grade 02 Adult Grade 05	Name (School) Not Applicable Not Applicable	2018-08-30 2018-08-28 2018-08-28 2018-08-28 2018-08-28 2018-08-25	Email	Does member allow email? V V V V V V V V V V
5U209 5U209 5U209 5U209 5U209 5U209 5U209 5U209	Troop01640 Troop00593 Troop01892 Troop01892 Troop01141 Troop00693	Troop Chaperone/Driver Troop Co-Leader GIRL Troop Chaperone/Driver GIRL GIRL	Adult Adult Girl Adult Girl Girl	City Chapel Hill Rougemont Durham Durham Cary Durham	Girl Grade Adult Adult Grade 02 Adult Grade 05 Grade 01	Name (School) Not Applicable Not Applicable Not Applicable	2018-08-30 2018-08-28 2018-08-28 2018-08-28 2018-08-25 2018-08-22	Email	Does member allow email? Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y
5U209 5U209 5U209 5U209 5U209 5U209 5U209 5U209 5U208	Treop01640 Treop00693 Treop01892 Treop01892 Treop01892 Treop00693 Treop00693	Troop Chaperone/Driver Troop Co-Leader GIRL Troop Chaperone/Driver GIRL GIRL Troop Chaperone/Driver	Adult Adult Girl Adult Girl Girl Adult	City Chapel Hill Rougemont Durham Cary Durham Durham	Girl Grade Aduit Aduit Grade 02 Aduit Grade 05 Grade 01 Aduit	Name (School) Not Applicable Not Applicable Not Applicable	2018.08.30 2018.08.28 2018.06.28 2018.08.28 2018.08.25 2018.08.22 2018.08.22	Email	Does member allow email? V V V V V V V V N
SU209 SU209 SU209 SU209 SU209 SU209 SU209 SU209 SU208 SU208 SU208	Treop01640 Treop00693 Treop01892 Treop01892 Treop01892 Treop00693 Treop00693 Durham 11 SU208 Team	Troop Chaperone/Driver Troop Co-Leader GIRL Troop Chaperone/Driver GIRL GIRL Troop Chaperone/Driver SU Roster Test - 208	Adult Adult Girl Adult Girl Girl Adult Adult	City Chapel Hill Rougemont Durham Cary Durham Durham Durham	Girl Grade Adult Adult Grade 02 Adult Grade 05 Grade 05 Grade 01 Adult Adult	Name (School) Not Applicable Not Applicable Not Applicable	2018.08.30 2018.08.28 2018.08.28 2018.08.28 2018.08.25 2018.08.22 2018.08.22 2018.08.22 2018.08.22	Email	Does member allow email? V
Service Unit SU209 SU209 SU209 SU209 SU209 SU209 SU209 SU209 SU209 SU208 SU208 SU208 SU208 SU208 SU209 SU208 SU209 SU208 SU209 SU208 SU209 SU208 SU209 SU209 SU208 SU209 SU208 SU209 SU209 SU209 SU208 SU209 SU209 SU209 SU209 SU208 SU209 SU209 SU209 SU209 SU208 SU209 SU209 SU209 SU209 SU208 SU209 SU	Troop01640 Troop01992 Troop01992 Troop01992 Troop01992 Troop0093 Troop0093 Durham 11 SU208 Team Troop02014	Troop Chaperone/Driver Troop Co-Leader GiRL Troop Chaperone/Driver GiRL GiRL GiRL Troop Chaperone/Driver SU Roster Test - 208 GiRL GiRL	Adult Adult Giri Adult Giri Adult Adult Adult Giri Giri	City Chapel Hill Rougemont Durham Durham Durham Durham Durham	Girl Grade Adult Adult Grade 02 Adult Grade 05 Grade 01 Adult Adult Grade 01	Name (School) Not Applicable Not Applicable Not Applicable Not Applicable	2018-08-30 2018-06-28 2018-06-28 2018-06-28 2018-06-28 2018-06-22 2018-06-22 2018-06-22 2018-06-21 2018-06-21	Email	Does member allow email? V V V V V V V V V V V V V

D. Troop Details

The Troop Details report offers a snapshot with the key information for every troop in the service unit. This report may be most useful for:

- identifying the troops that are open or closed on the Opportunity Catalog
- gathering basic troop information at a glance
- confirming troop meeting information with troop leaders and assistant leaders, then sending updates to <u>customercare@sdgirlscouts.org</u>

Troop Details webpage filters

Filters are the same as the filters on the Full Roster Dashboard:

- 1. Filter on service unit (one or more depending on roles held)
- 2. Filter on troop or group
- 3. Click RUN to see filters get applied

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			Full Roster
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	··· / I		New In The Last Two Weeks
Full Roster 50 Views, Created by Jessica Vacanti	Membership Analysis 22 Views, Created by Jessica Vacanti	New in the Last Two Weeks 18 Views, Created by Jessica Vacanti	

SU Roster V Troop D	etails 🗢												just now	Each Tile's Time America - Ne		Run
▼ FILTERS Service Unit		qual to	s SU	208 × SU20	9 × SU215	×		+		After selecting Filter values, Click Run.						
Troop or Gr	roup is e	qual to	*				۲	+								
										Troop Details						
Service Unit ^	Troop/Group	Participation Type	GS Community Year	Program Grade Level	Meeting Days	Meeting Start Time		Meeting Location	Meeting Notes			Girls Pending	Desired # of Girls	Girl Openings Remaining	Volunteers Needed to Start	
1 SU208	Troop00700	Troop	2019	Cadette	Thurs	6:15 PM	7:45 PM				12	(16	i .	4	3 N
2 SU208	Troop01127	Тгоор	2019	Cadette	Fri	6:00 PM	8:00 PM				1	c	12	1	1	1 N
3 SU208	Troop00810	Troop	2019	Senior	Thurs	6:15 PM	7:45 PM				11	0	15		4	2 N

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SU Roster Full Ro	, oster ♡																2m ago	Each Tile's Tin America - N	ne Zone 🗸 lew York	Run 🛞
• FILTE	RS Year is "Current Ye	ear" Service Unit i	s "SU208" or "SU209	" or "SU215"	Troop or G	roup is any value														
							Full Ro:	ster (bas	ed on yea	r in filter										:
Service Unit	Troop/Group	Membership Type	Position	First Name	Last Name	Email	Does member allow email?	Phone Number	Address Line	City	State Name (Abbr.)	Zip Code	Name (School)	Girl Grade	Position Active Date \checkmark	Status	Expiration Date	Preferred Contact First Name	Preferred Contact Last Name	Does member allow photograph?
1 SU209	Troop01640	Adult Membership	Troop Chaperone/Driver	_			Y			Chapel Hill	NC	27516	Not Applicable	Adult	2018-08-30	Eligible	2022-08-29			Y
2 SU209	Troop00693	Adult Membership	Troop Co-Leader	_	_		Y			Rougemont	NC	27572	Not Applicable	Adult	2018-08-28	Eligible	2022-07-28			Y
3 SU209	Troop01892	Adult Membership	Troop Chaperone/Driver		-		Y			Durham	NC	27705	Not Applicable	Adult	2018-08-28	Eligible	2020-09-07			N
4 SU209	Troop01892	Girl Membership	GIRL		_		Y			Durham	NC	27705	School Not Found	Grade 02	2018-08-28	NOT APPLICABLE	ø			Y

Troop Details: Sort the Data

The Troop Details report in this section has been simplified to protect volunteer information and for ease of demonstration.

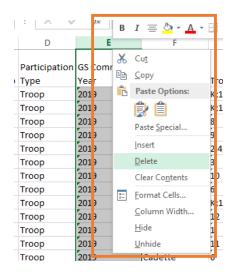
1. **Open the Report.** At first, you will see a ton of information. Start by looking at the top row to see the categories the information is grouped under:

	С	D	E	F	G	н	1	J	К	L	М	N	0	Р	Q	R
Г		Participation	GS Community	Program Grade		Meeting	Meeting	Meeting	Meeting			Girls	Girls	Desired #	Openings	Display in
1	Troop/Grou	o Type	Year	Level	Troop Grade	Frequency	Days	Start Time	End Time	Meeting Location	Meeting Notes	Assigned	Pending	of Girls	Remaining	Catalog?
	02005	Тгоор	2010	Daisy	14.4 17/2	Di weekly	TOD			meeting location in	CCCD council notes	2	0	12	10	Y
	p02135	Troop	2019	Daisy	K;1	Bi-weekly	Mon	2:45 PM	4:00 PM	meeting location in	GSSD council notes	12	0	12	0	N
	0002192	Troop	2019	Cadette	8	Bi-weekly	Wed	2:00 PM	3:15 PM	meeting location in	GSSD council notes	5	0	12	7	N

The report includes information regarding:

service unit, troop/group, participation type, program grade level, meeting information, girl membership totals, and whether the troop is displayed as open in the Opportunity Catalog

You can delete columns you do not find useful. Just "right click" at the top of the column and click "Delete."



2. Sort the Report.

Begin by selecting "Custom Sort" from the HOME tab.

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B3		• : ×	√ f _x	Troop02135											ZA↓ Sort Z to A	
	A	В	с	D	E	F	G	Н	I.	J	К	L	м	N	Custom Sort	Q
Se	rvice		Participation	Program Grade		Meeting	Meeting	Meeting	Meeting			Girls	Girls	Desired #	Sint -	
Ur	nit	Troop/Group	Туре	Level	Troop Grade	Frequency	Days	Start Time	End Time	Meeting Location	Meeting Notes	Assigned	Pending	of Girls	Ren 🍢 Reapply	
2 Su	IXXX	Troop02935	Troop	Daisy	K;1	Bi-weekly	TBD			meeting location in	GSSD council note	2	2 0) 12	TO A	_
3 Su	IXXX	Troop02135	Troop	Daisy	K;1	Bi-weekly	Mon	2:45 PM	4:00 PM	meeting location in	GSSD council note	12	2 0) 12	0 N	
4 Su	IXXX	Troop02192	Troop	Cadette	8	Bi-weekly	Wed	2:00 PM	3:15 PM	meeting location in	GSSD council note	5	i C) 12	7 IN	
5 Su	IXXX	Troop08912	Troop	Senior	9	Bi-weekly	Wed	1:00 PM	2:30 PM	meeting location in	GSSD council note	2	2 0) 12	10 N	
- c i		Troop02121	Troop	Multi Loval	2-4-5	Pi wookly	Thure	1-20 DM	2.00 014	monting location in	CSSD council note	6	. r	1 1 1 2	6 N	

Once you select sort, you can sort the roster by each category. When you are selecting how to sort the roster, there are some things to consider:

- "Troop/Group" will organize the troops by number in chronological order
- "Program Grade Level" will group troops as Daisy, Brownie, Junior, etc.
- "Girls Assigned" will group troops by size
- "Display in the Catalog?" will group troops by "yes" or "no"

3	• : ×	$\checkmark f_x$	Troop02135														~
Α	В	С	D		E	F	G	н	1	J	K	L	M	N	0	P	Q 🔺
Service		Participation	Program Grade			Meeting	Meeting	Meeting	Meeting			Girls	Girls	Desired #	Girl Openings	Display in	
Unit	Troop/Group		Level		Grade	Frequency	Days	-	End Time	Meeting Location	Meeting Notes	Assigned	Pending		Remaining	Catalog?	
Suxxx Suxxx	Troop02935 Troop02135	Troop Troop	Daisy Daisy	K;1 K;1	Sort						? ×	12) 12			
Suxxx Suxxx	Troop02192 Troop08912	Troop	Cadette Senior	8	* <u>A</u> ↓ <u>A</u> dd I	Level X Del	ete Level	E Copy Lev	el 🔺 🤻	Options	☑ My data has <u>h</u> eade) 12	7	N	
Suxxx	Troop02121	Тгоор	Multi-Level	2;4;5	Column Sort by			Sort On		Order		6	i () 12	6	N	
Suxxx Suxxx	Troop02951 Troop02209	Troop Troop	Brownie Senior	3 10		Service Unit	~	Values		✓ A to Z	~	<u>د</u>				N N	
Suxxx	Troop02171	Troop	Cadette	6		Troop/Group Participation Ty						6	i () 12	6	N	
Suxxx	Troop02011	Troop	Multi-Level	K;1;2		Program Grade Troop Grade	Level					37	<u>ر</u> () 44	7	N	
Suxxx	Troop08216	Troop	Ambassador	12		Meeting Frequ	ency					7	· () 12	5	N	
Suxxx	Troop02726	Troop	Daisy	1		Meeting Days Meeting Start T	ime					11	1	11	0	N	
Suxxx	Troop08173	Troop	Ambassador	11		Meeting End Ti	me					3	(C) 12	9	N	
Suxxx	Troop02199	Troop	Cadette	6		Meeting Locati Meeting Notes	on				OK Cancel	7	· () 12	5	N	
Suxxx	Troop02736	Troop	Daisy	1	_	Girls Assigned	~						0) 12	3	Y	
Suxxx	Troop08751	Troop	Multi-Level	K;2		Monthly	Wed	2:00 PM	3:00 PM	meeting location in	n GSSD council note	13	0) 12	0	N	

By sorting by "Program Grade Level," we can see this service unit has one Brownie troop displayed as open in the Opportunity Catalog.

Suxxx	Troop07777	Troop	Ambassador	11	Monthly	Fri	5:00 PM	8:00 PM	meeting location in	GSSD council notes	4	0	12	8 N	
Suxxx	Troop01234	Troop	Brownie	3	Monthly	Sun	1:00 PM	1:00 PM	meeting location in	GSSD council notes	8	0	10	2 N	
Suxxx	Troop05678	Troop	Brownie	2	Bi-weekly	Mon	3:45 PM	5:00 PM	meeting location in	GSSD council notes	8	0	12	4 N	
Suxxx	Troop09101	Troop	Brownie	3	Monthly	Sun	4:30 PM	5:30 PM	meeting location in	GSSD council notes	6	0	8	2 N	
Suxxx	Troop01213	Troop	Brownie	2	Monthly	Wed	1:40 PM	2:30 PM	meeting location in	GSSD council notes	10	0	12	2 Y	
Suxxx	Troop09999	Troop	Cadette	8	Bi-weekly	Wed	2:00 PM	3:15 PM	meeting location in	GSSD council notes	5	0	12	7 N	
Suxxx	Troop03333	Troop	Cadette	6	Monthly	Mon			meeting location in	GSSD council notes	6	0	12	6 N	
-		-		<u>*-</u>		-					_	-			

The Troop Details in this section has been simplified or edited to protect volunteer information and for ease of demonstration.

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