

9CR Leader Meeting **HOW TO FIND YOUR MEMBERS**
26 August 2020

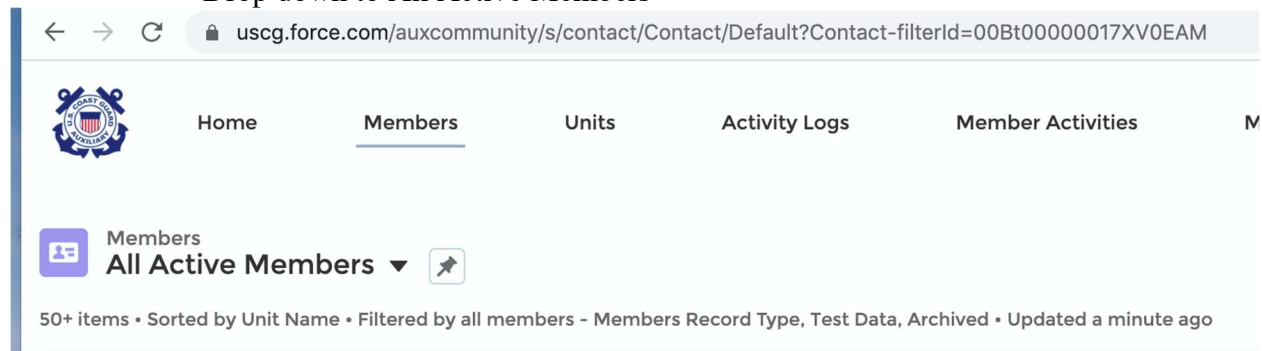
1. How to find your members (hint – see # 2)
2. How to create a Unit list
3. How to see member's qualifications, etc.
4. How to check specific training and entries.
5. How to check recent mission entries.
6. Eligibility Report-Cathie

Time for questions and answers.
Should be able to get through it in 1 hour.
Garrison can run things because I will be on my phone.

How to Find a Member

Using the MEMBERS menu item, open the members area.
I recommend ALWAYS using a refined list if possible. The system is much friendlier to smaller lists.

On the left side of the page (under the menu items), see the Members drop down list.
Drop down to All Active Members



Create a new list that contains the members of your unit

Members
091-30

50+ Items • Sorted by Unit Name • Filtered by all members - Member Status, Members Record Type, Unit Number • Updated a few seconds ago

Search this list...

Member ID	Unit Num...	Name	Unit Name ↓	Email	Me
1	3003259	DAWN MICHELLE GARRITSON	RED RIVER AND NW MINNE...	dgarritson3005@gmail.com	BC
2	1234358	GARY LAWRENCE GARRITSON	RED RIVER AND NW MINNE...	kc0jpp@gmail.com	BC
3	1242933	PAUL MICHAEL CARLSON	RED RIVER AND NW MINNE...	yitzcha@gmail.com	BC
4	1231082	TANYA LAYNE HENDERSON	RED RIVER AND NW MINNE...	nat17cmnd@gmail.com	BC
5	3006545	EDWARD HAROLD ROHLK	RED RIVER AND NW MINNE...	edrohk@hotmail.com	BC
6	1234357	RICHARD DUANE SHERVOLD	RED RIVER AND NW MINNE...	kc0lur@gmail.com	BC
7	1218046	BRIAN EDWIN MARTY SR	RED RIVER AND NW MINNE...	bmarty6667@gmail.com	BC
8	1218635	MARK DOUGLAS ENGEN	RED RIVER AND NW MINNE...	mengen0115@gmail.com	BC
9	1180394	RANDALL LEE CUST	RED RIVER AND NW MINNE...	rgust.1975@gmail.com	BC
10	1174708	HOWARD HARRIGAN GLAD...	RED RIVER AND NW MINNE...	hhg@gra.midco.net	AX
11	1177086	JULIE FRANCIS GLADWIN	RED RIVER AND NW MINNE...	jgladwin@gra.midco.net	BC
12	1232989	TRACEY LYN ALDERSON	RED RIVER AND NW MINNE...	makona93@yahoo.com	BC

Filters [X]

Filter by Owner
All members

Matching all of these filters

Members Record Type
equals Auxiliary Member [X]

Member Status
equals AP, IQ, BQ, AX2, AX [X]

Unit Number
starts with 09130 [X]

Add Filter Remove All

Add Filter Logic

Click on the list of ALL Members.

Click on the gear on the right-hand side of the list and drop down to Clone

A new window will open up allowing you to rename the list, Save.

Click on the Wine glass and filter the list as shown here

Search this list...

[Gear] [List] [Refresh] [Edit] [Filter]

Filters [X]

Filter by Owner
All members

Matching all of these filters

Members Record Type
equals Auxiliary Member [X]

Member Status
equals AP, IQ, BQ, AX2, AX [X]

Unit Number
starts with 0913007 [X]

Add Filter Remove All

Add Filter Logic

Don't worry, you can't screw this up.

You will be working with drop down menus for selections. If the screen comes up blank, review the filters above and be sure they are exact (for starters).

How to see member qualifications, previous awards, currencies, etc.

Open you unit list

Click on the member's name

There are 4 windows available.

Detail- Shows the basics.

Any information that member cannot change can be requested to DSO-IS via CoL

Related-Shows (View All shows full list)

Recent Activities

Skills that are entered into AuxData (this can be updated)

Competencies (quals) Certified or in REYR

Awards

Facility Ownership (includes facilities member can operate)

Offices (current and past)

Crew time

Tasks Completed

Record of Requests and Patrol Orders and how signed

...more

Reports

To get to reports, use the main menu, drop down on More and select reports.

When the report window opens, click on "All Folders"

	<input type="checkbox"/>	Member ID	Unit Number	Name	Unit Name
1	<input type="checkbox"/>	3005595	0913007001	RICHARD CECIL MATHERS	NISSWA
2	<input type="checkbox"/>	3000893	0913007001	SEAN ARTHUR RANDALL	NISSWA
3	<input type="checkbox"/>	3004879	0913007001	REBECCA JANE CLARK_RANDALL	NISSWA
4	<input type="checkbox"/>	3004777	0913007001	HANNAH RENEE HEMEN	NISSWA

REPORTS	Report Name
Recent	
Created by Me	Individual Mission D
Private Reports	
All Reports	
FOLDERS	
All Folders	Individual Training R
Created by Me	
Shared with Me	
FAVORITES	All Coxswains Flotilla

Member Training

Select your choice:
Individual



Reports
All Folders
11 Items

REPORTS	Name	Create
Recent	...	Andrev
Created by Me	Auxiliary Reports	Admin
Private Reports	...	Admin
All Reports	District Reports	Admin
FOLDERS		
All Folders	Division Reports	Admin
Created by Me	Flotilla Reports	Admin
Shared with Me	Individual Reports	Admin
FAVORITES		
All Favorites	...	Admin

Click on Individual Reports
Mission Detail- then click on Individual Training OR
Individual Mission Detail-

Report: Members with Member Tasks
Individual Training Record
This report displays the training record (tasks) for the member identified by member ID in the filter.

Total Records
69

Member ID	Full Name	Task Type	Activity Date
1240799 (69)	AMANDA LEIGH CONSTANT (69)	VALIDATE CPR PROVIDER	-
		INSTRUCTOR WORKSHOP	9/1/2011

This is where you filter to the individual member.
Go the Wine glass and change the member # to the member you want information on.
Same thing for the Mission Details.

General Comments that might help

Search space in the upper right-hand corner of the screen searches the entire system.
If looking for an individual member, suggest looking up the member in AuxData and entering their member #