

AUX DATA II

Lists and Reports Basic Training

Working with lists

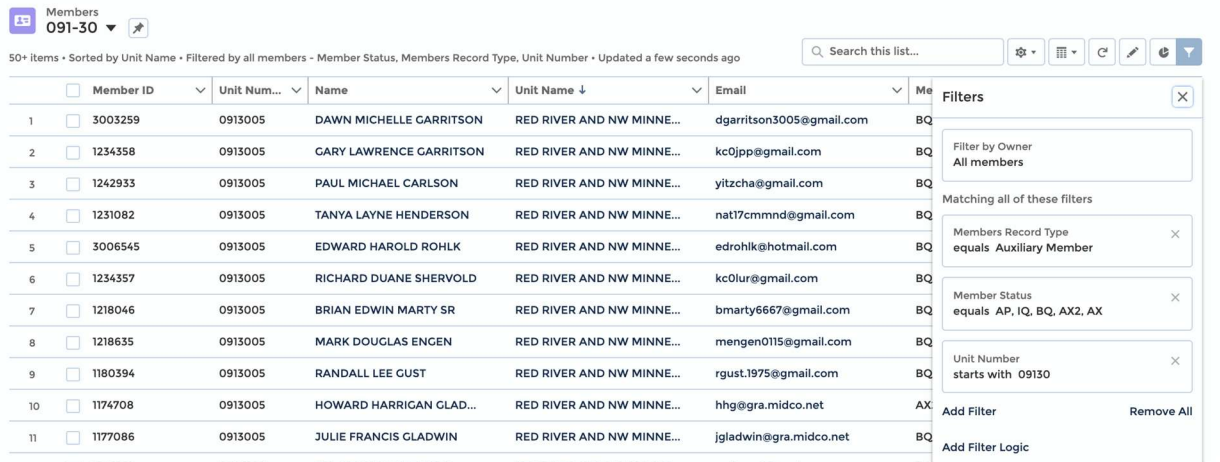
Step One to start something brand new
 "ALL" _____ (fill in the blank)



Find the Gear and Drop down to "Clone"
 Step Two-When the window opens up, RENAME to something that makes sense.



You now see the same list , but with a different name.
 Step Three is to change the filters to match the criteria you want.
 Done and Save



Changing up Lists of fields on your new lists.

Examples we will demonstrate

- List of Unit Members
- List of Unit Members with (or without Core Training)
- List of Patrol Orders (PO)
- Lists of Patrol Requests (PI)
- List of Facility Requests (FI)
- List of Facilities (F)

Working with Reports

Simple reports (Pre-made)

The screenshot shows the 'Reports' section of the uscg.force.com website. The page title is 'Recent' with 17 items. A search bar is present with the text 'Search recent reports...'. Below the search bar is a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains three rows of report data.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Flotilla Mission Activity Report 091307	This report shows the mission activity by member for the selected unit in the specified time frame. (Since 1/1/2020	Private Reports	SUSAN THURLOW	9/5/2020, 12:55 PM	
Created by Me	Flotilla Mission Activity Report	This report shows the mission activity by member for the selected unit in the specified time frame.	Flotilla Reports	Admin User 3	4/27/2020, 6:59 AM	
Private Reports	Required Tasks - GENERAL Comps		Auxiliary Member Ri	Admin User 2	8/20/2020, 4:50 AM	
All Reports	Required Tasks - UNIT Comps		Auxiliary Member Ri	Admin User 2	8/20/2020, 4:50 AM	

This is a duplicate of the screenshot above, showing the 'Reports' section of the uscg.force.com website with the same table of report data.

Custom Reports and Saving them.

- Edit
- Save As
- Save to "Private Folder"
- Exporting- there is an issue with this.

