girl scouts of western washington

Guide to Service Unit Roster Access in Looker

Introduction

Looker is an online tool that provides acess to data for Girl Scout employees and volunteers to help them better serve and support members. Looker helps Service Unit volunteers know if local volunteers and youth participants have current membership, and provides detailed membership information to inform planning and participation in local events or trainings.

You will have access to the data from the Service Unit relevant to your volunteer role. If your role covers multiple Service Units, you will have one Looker login and can navigate between the different Service Units within Looker.

Please treat personal data with care and respect the sensitivity of the information in Looker by:

- Not sharing your log-in information.
- Only downloading reports to your computer as PDF or CSV files when absolutely necessary.
- Never share Looker data with unapproved volunteers or with outside individuals or organizations. Refer any requests for such data to the council.

Membership data in Looker is one day old. Data from the council membership database syncs with Looker nightly.

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Vocabulary

Term	Definition
BCG Status	Background check status (for adult volunteers)
Dashboard	A collection of graphs and charts that summarizes information and trends related to a specific topic.
Display in Catalog	A "Y" value indicates families can find the troop in the online search on the council website and directly register to join it.
Filter	Filters tell the report what kind of data you are looking for. They let you look at a more specific set of data than what is displayed on the generic report.
Girl Scout Membership Year	The membership year runs October 1 to September 30.
Is Awaiting Placement?	A "yes" value indicates a Girl Scout is looking for a troop placement.
Look	A table of data that is not accompanied by additional visuals or charts. The roster report is a Look.
Personally Identifiable Information	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.
Preferred Contact First/Last Name	The preferred adult caregiver to contact for a youth member.
School Association	A school the troop is associated with and some members may attend. Does not indicate meeting location.
Service Unit	A geographic area made up of one or more zip codes. Abbreviated as SU.
Troop	A group of youth and adults engaged in Girl Scout activities.

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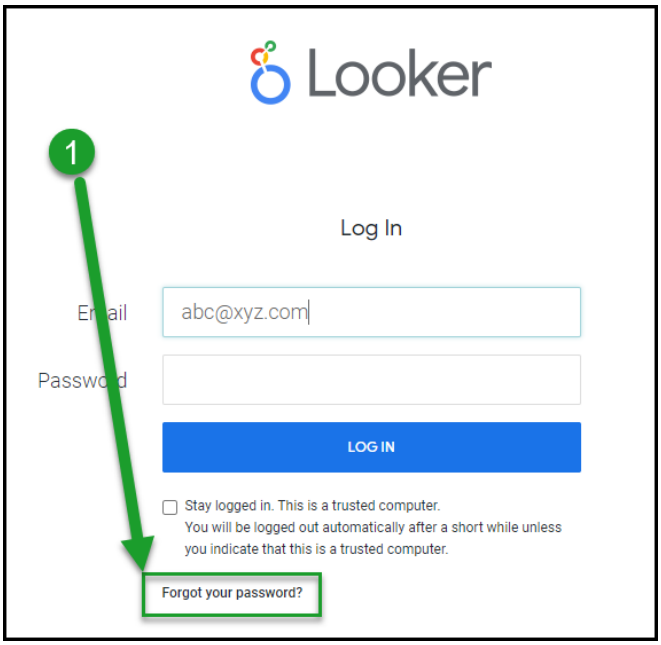
How to Set Up Your Account the First Time

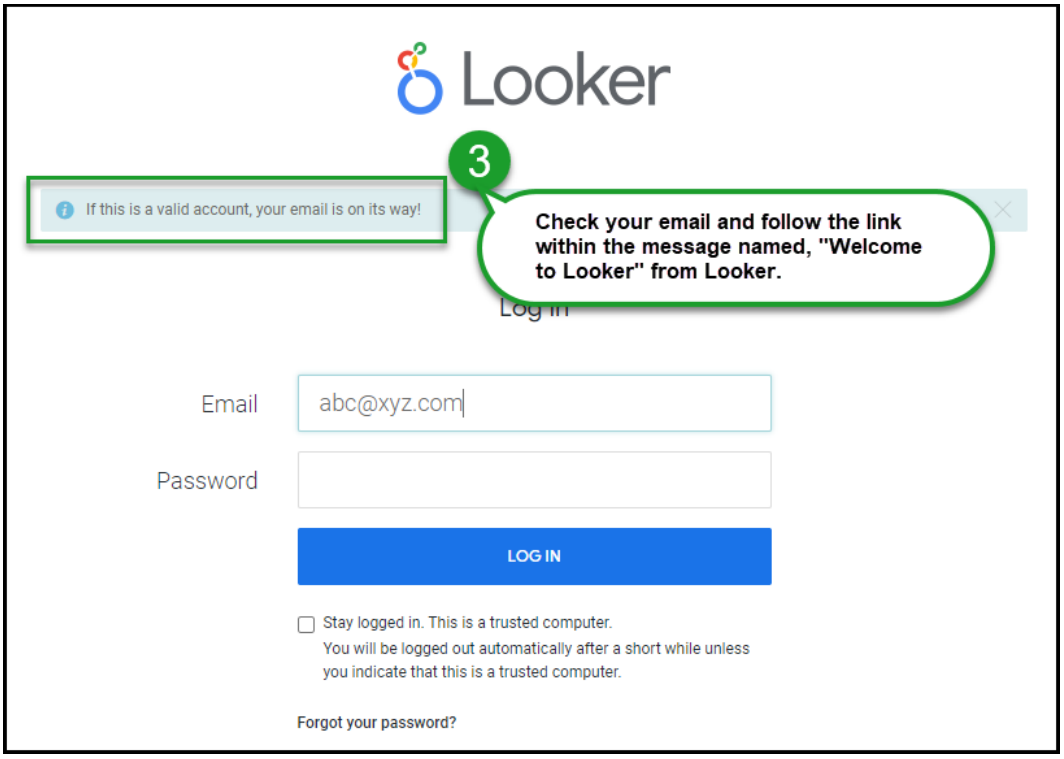
After you receive the email "Your Service Unit Roster Access Information," it takes an **overnight refresh** for your information to move to Looker. If you try to access Looker the same day you get this email, the steps below will not work.

1. Navigate to: https://girlscouts.looker.com/. Then, click on 'Forgot your password?'



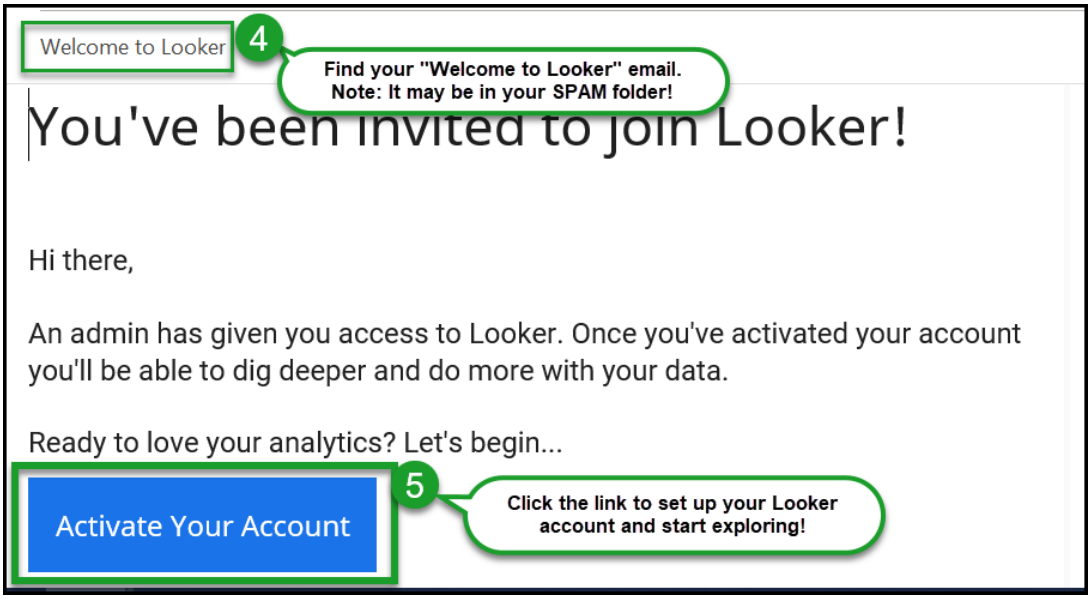
2. Enter your email address you use to receive Girl Scouts correspondence and access My GS. Then click the Reset Password button.

3. When you see the following screen, go to your email mailbox.



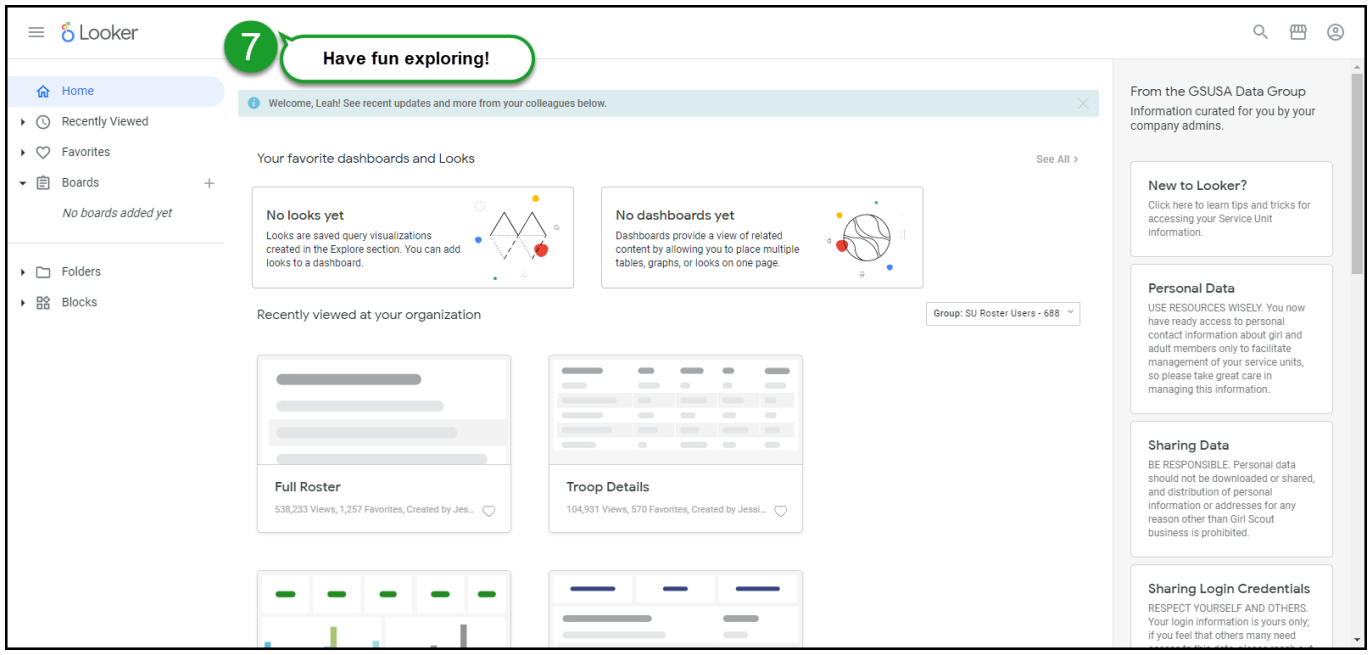
You should receive an email with the subject line "Welcome to Looker' (Check your spam folder if you don't see it in your inbox). The email will come from noreply@lookermail.com. If you do not receive an email, send an email to CustomerCare@girlscoutsww.org or call (800) 541-9852.

4. Click on the link in the email message.



5. Set up your account by entering your first name, last name, and choosing a strong password. Click Submit.

6. You will now be on your Looker Home Page.



In the future, you can login to Looker at any time by navigating to https://girlscouts.looker.com. We recommend you bookmark the homepage for easy access.

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Summary of Available Reports

Report Name	What it Shows	Available Filters
Full Roster	The Service Unit roster(s) for the area(s) you are assigned. For youth includes information like troop, contact info, school, and grade. For adults, includes troop and volunteer role, background check eligibility, and background check expiration date.	Membership Year, Troop or Group, Service Unit (if you volunteer in multiple Service Units), Role Name, Role Active, Background Check Status or Expiration Date, Youth Grade, Youth School, First or Last Name, Email, Guardian Email, Troop Program Grade Level, Is Awaiting Placement? (Yes/No), and more.
Membership Analysis	See your overall Service Unit stats at a glance, including how many youth and adults are registered for this year or next year, how many troops you have, and members by grade.	Membership Year (Current or Next), Troop or Group, Service Unit (if you volunteer in multiple Service Units), Role Active, and Is Awaiting Placement? (Yes/No).
New in the Last Two Weeks	A roster showing only new members in the designated time period.	Membership Year (Current or Next), Troop or Group, Service Unit (if you volunteer in multiple Service Units), Role Name, Role Active, and Is Membership New?
Troop Details	View troops and their meeting info. Click on a troop number or filter for a specific troop to see its details (grade, meeting location, meeting time, etc).	Troop or Group, Service Unit (if you volunteer in multiple Service Units), Program Grade Level, Troop Grade, Meeting Days or Location or Zip Code, School Association, and more.
gsLearn Summary	View the number of gsLearn courses completed, in progress, and assigned but not started for the members of the SU. Click on a number to see the members or look at the Members List for more details.	Membership Year, Service Unit (if you volunteer in multiple Service Units), Troop, Course Title, Course Completion, User Course Completed Date, Full Name or Email of member, and Role Name.

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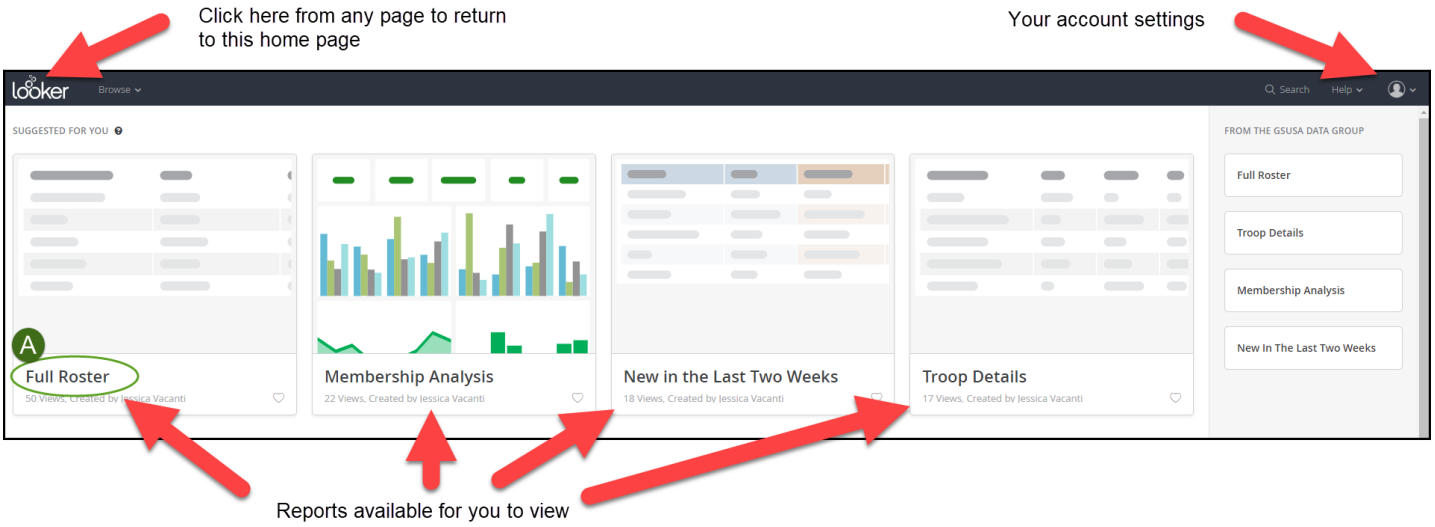
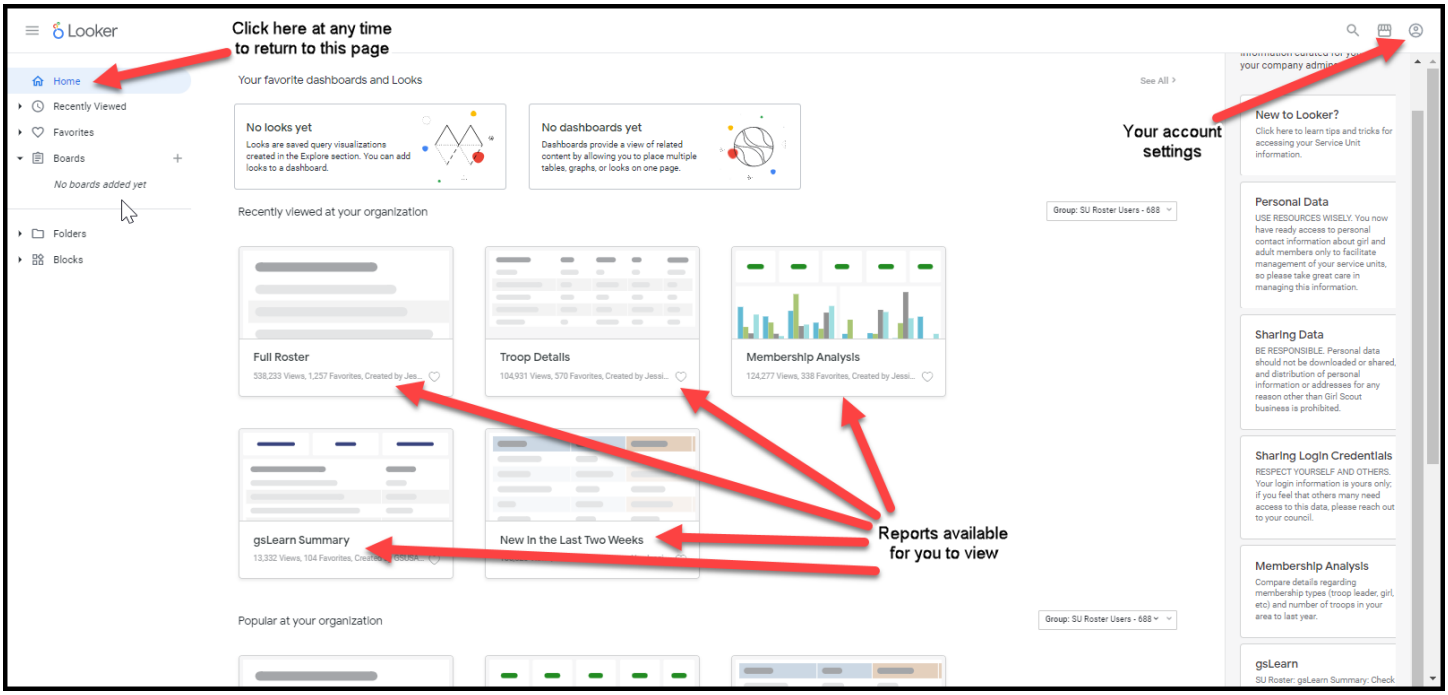
Navigation and Features in Looker

Home Page Navigation Tips





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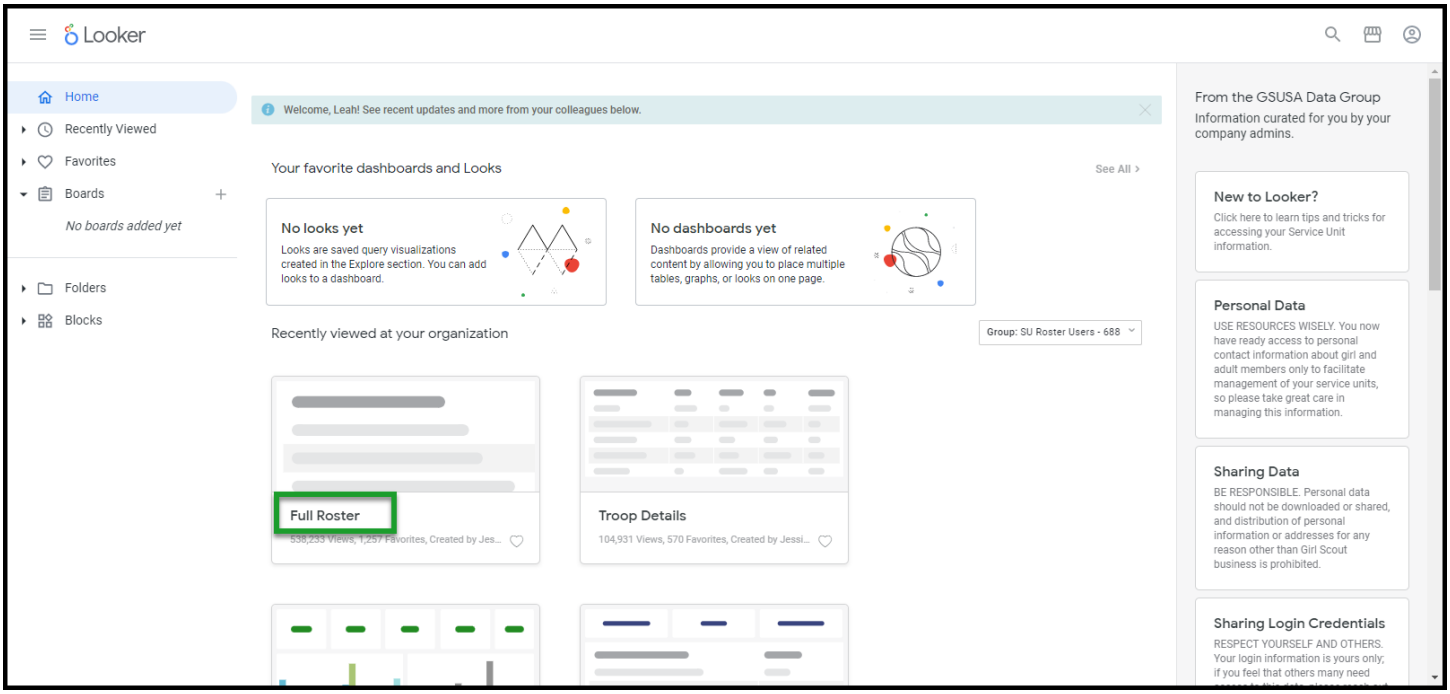
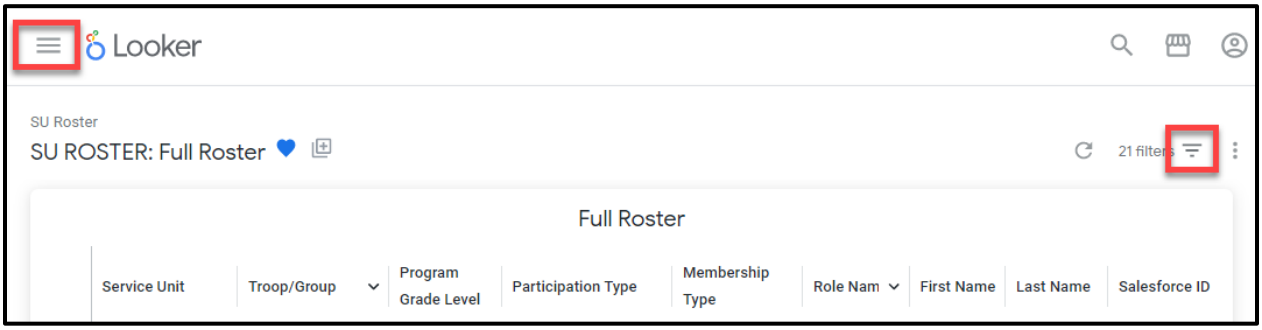
Full Roster Report

This report allows you to view your full Service Unit roster(s) for the area(s) you are assigned. Let's take a tour.

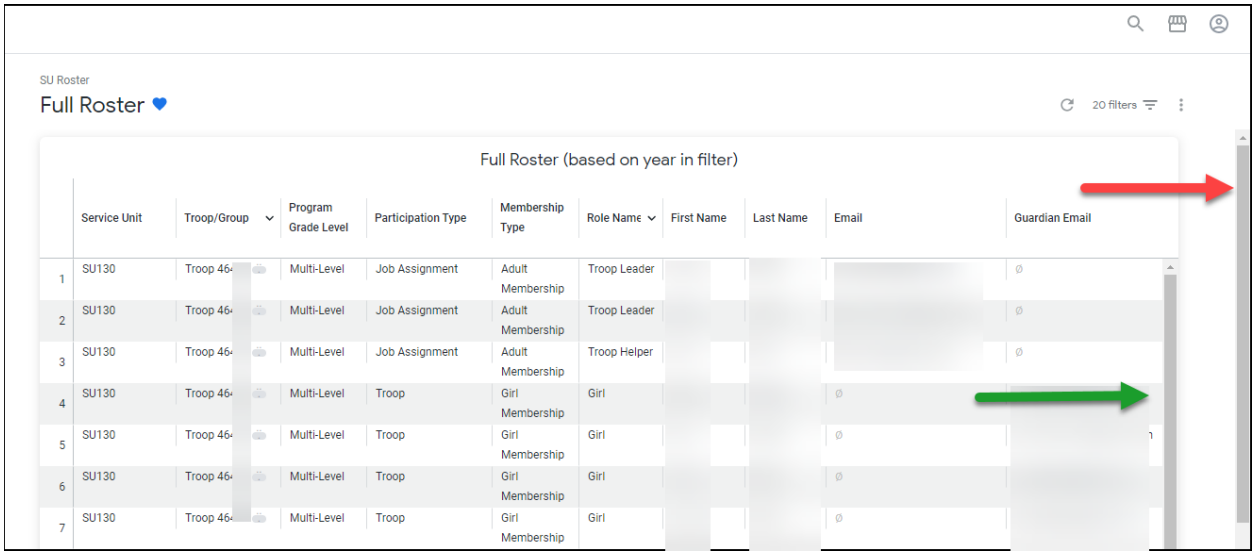
1. On the home page, click on the tile named "Full Roster."



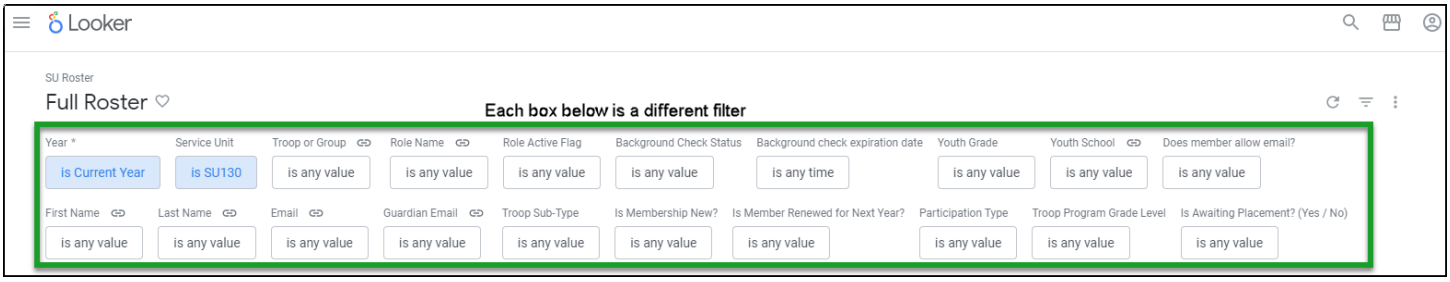
2. The data for the roster will load in your web browser. Note that it is a very wide window. To see the details on the far right, you may need to stretch your browser window to be longer or scroll to the far right.
   Use the three lines next to the Looker logo to hide the left sidebar menu, and the three lines shaped like a funnel at the top right of the roster to hide the filters menu.



If you don't initially see a scroll bar at the bottom to move from left to right, pull the far right scroll bar downward (red arrow) to the bottom of the report. Then the left right scroll should appear at the bottom of your screen.
Use the inner scroll bar (green arrow) to view the rows of data.



3. **How to use Filters:** The filters are visible at the top of the roster.

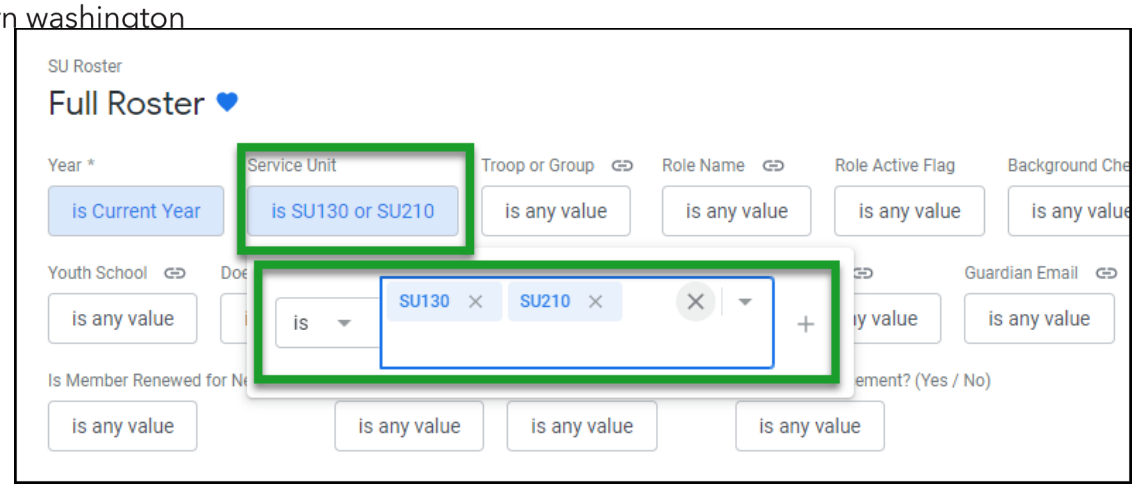


You can choose to apply any of the filters that appear in the list.

a. **The year filter** lets you see the data for the previous year, current year, and during renewal season for next year. The filter defaults to Current Yeat but if you want to change that, click in the box under "Year". A box will appear with a down arrow allowing you to select Previous Year, Current Year, or Next Year.

After changing a filter, click the blue Update button in the top right corner to update your report results.

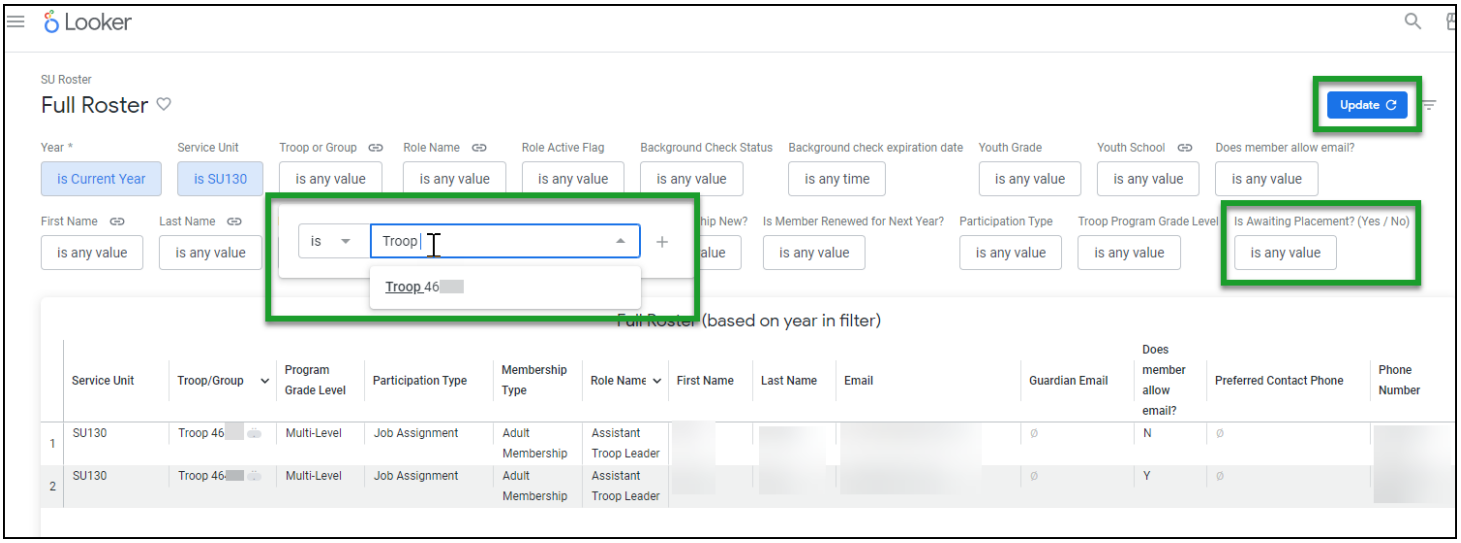
b. If you volunteer with more than one Service Unit and have access to multiple rosters, you can use the **Service Unit filter** to set which Service Units you want to display. Do not put a space between SU and the number (SU130, not SU 130). Click Update after making your change.



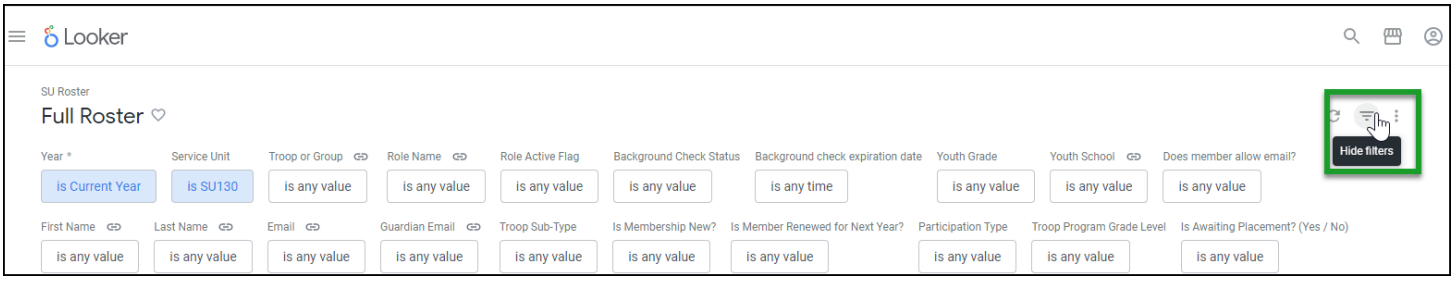
c. To view the roster for a specific troop, use the **Troop or Group filter**. Type the troop number into the box to the right of "is." You need to leave a space between the word troop and the number (ex. Troop 41111). Click the Update to run the report.

   A drop-down menu may appear as you type showing available results. You can speed up the process by selecting the troop number from the drop-down menu. If the list does not appear, the filter may still work. Finish typing the troop number, then click Update. The troop roster should appear. If it does not, you may not be entering the correct troop number.

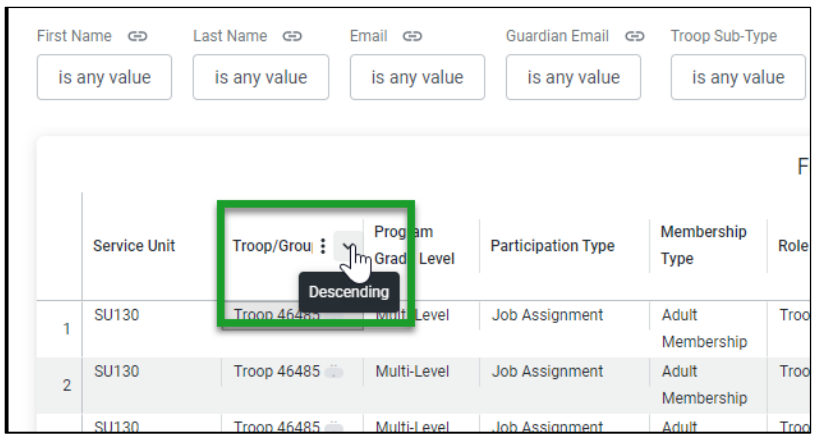
   To view youth who are Awaiting Placement, click the box below the Is Awaiting Placement? (Yes/No) and enter "Yes."



4. To close the Filters box and see more of your report on the screen, click the three lines that form an inverted triangle on the right side of the screen. Click the same three lines to reveal the filters again.



5. **Sorting Columns:** You can further sort your data by clicking the arrow that appears when you hover over the column header for any column. For example, click on the Troop/Group column header to sort your report by troop number.



If you do this for a large report, it may take a couple moments for the reorganized data to load.

If the sorting is in the opposite order than what you want (for example, Z-A instead of A-Z), click the top of the column again.

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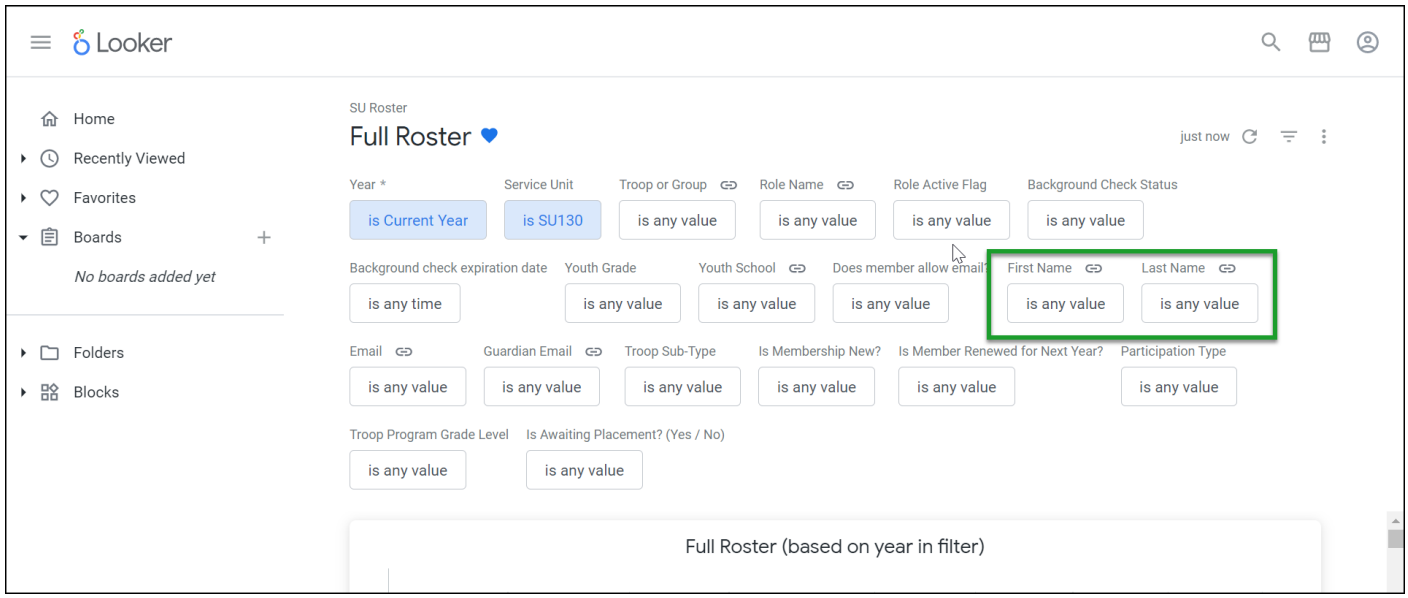
Searching for an Individual Member using the SU Roster: Full Roster

1) To search for an individual in your Service Unit, look at the Filters for the First Name and Last Name fields. As you type letters, last names that match will show in a drop down.



2) Usually you get the best results when you use only one of these fields at a time for your search. Last Name or Email fields work best because there are less likely to be multiple people with the same information. Click the name or email address and then click Update.

3) Remember to click the triangle of three lines if you want to minimize the filters to see your results better. You will see a line for each person who matches the search criteria you entered.

   Note: Only active members appear on Looker reports. You will not see anyone who is still in the process of purchasing their membership or who has not yet had their Financial Assistance approved.

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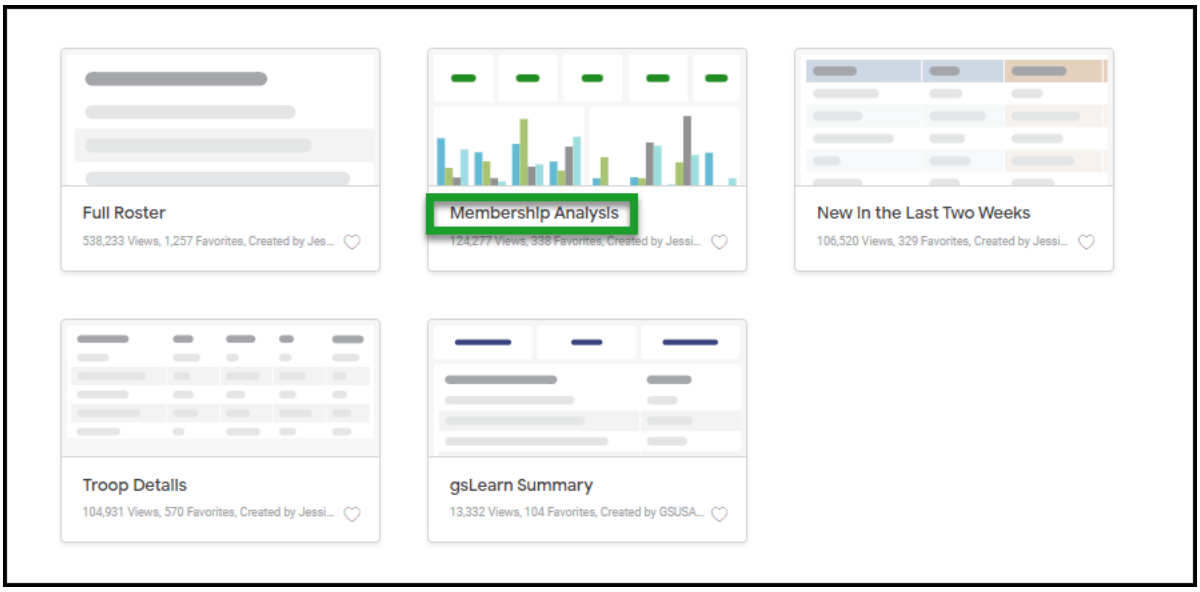
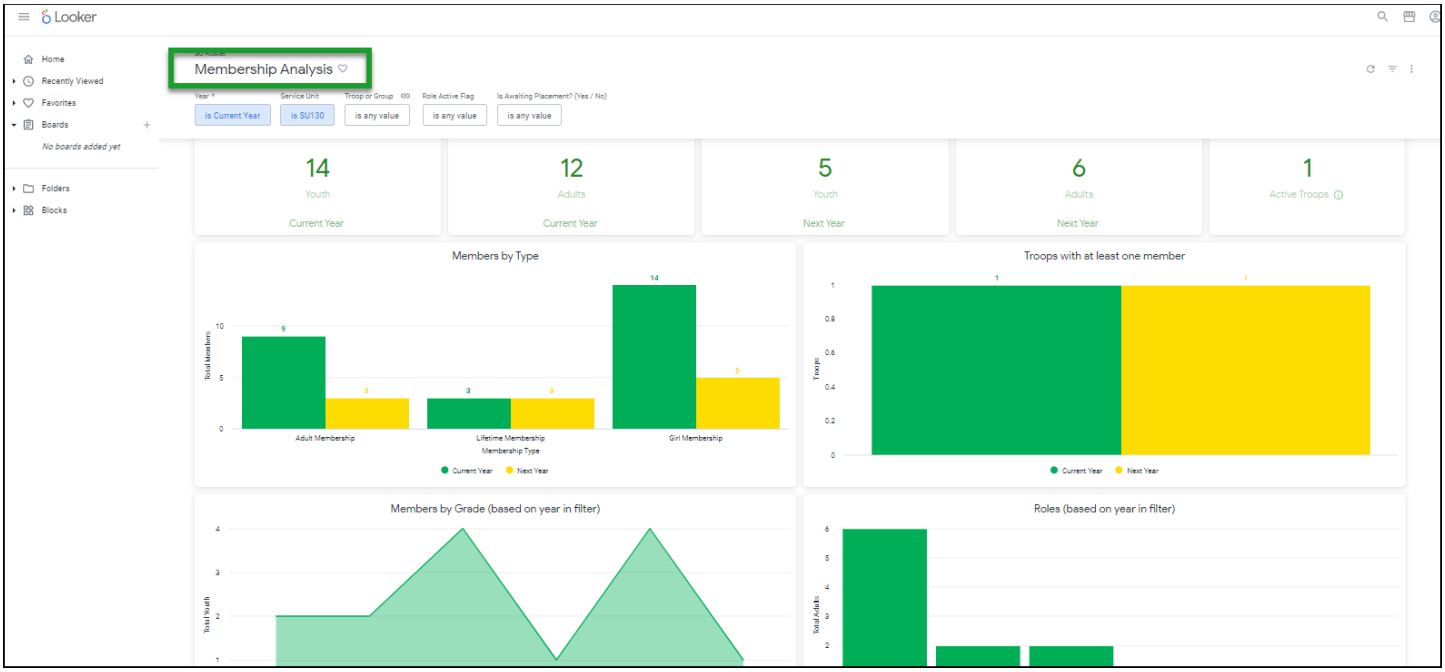
Membership Analysis Report

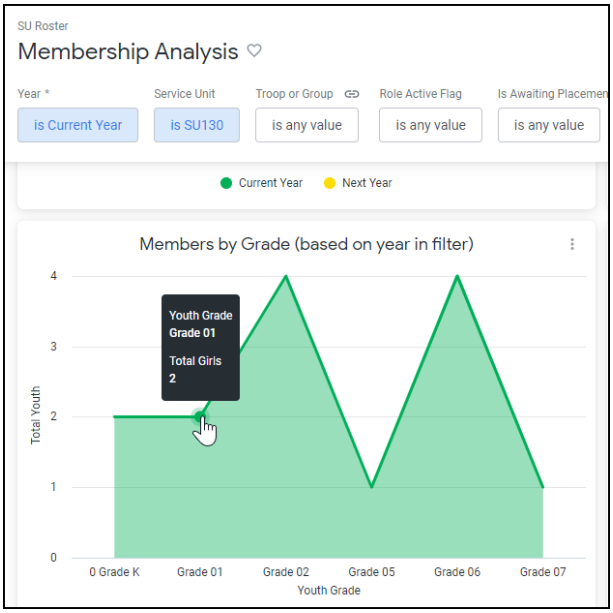
Use this report to see your overall Service Unit stats at a glance, including how many youth and adults are registered for this year or next year, how many troops are in the SU, youth members by grade, and adult members by role.

1. On the home page, click Membership Analysis.





2. Review the list of filters, which allow you to narrow your results by criteria such as Year (Current or Next), Troop or Group number, Role Active, and Is Awaiting Placement? (Yes/No).
3. Click Update to apply the filters if you made any changes.
4. You can click on the graphs and numbers on this dashboard to see more information. For the line graph, to click on the data point dot to get to the screen with detailed information.



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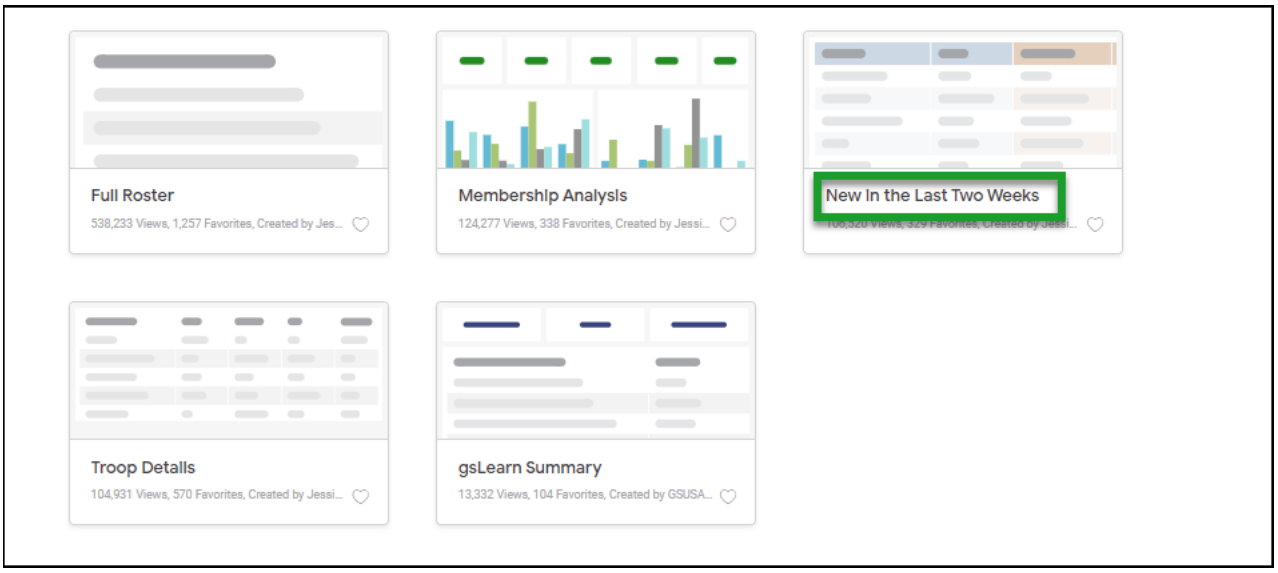
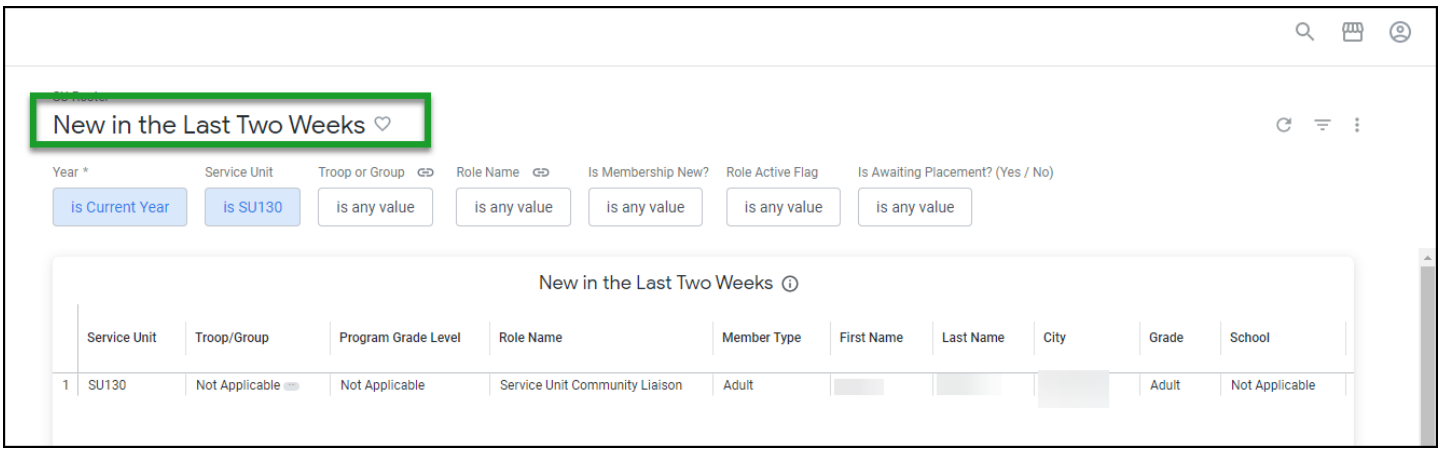
New in the Last Two Weeks Report

A roster showing only new members in the designated time period.

1. On the home page, click New in the Last Two Weeks.





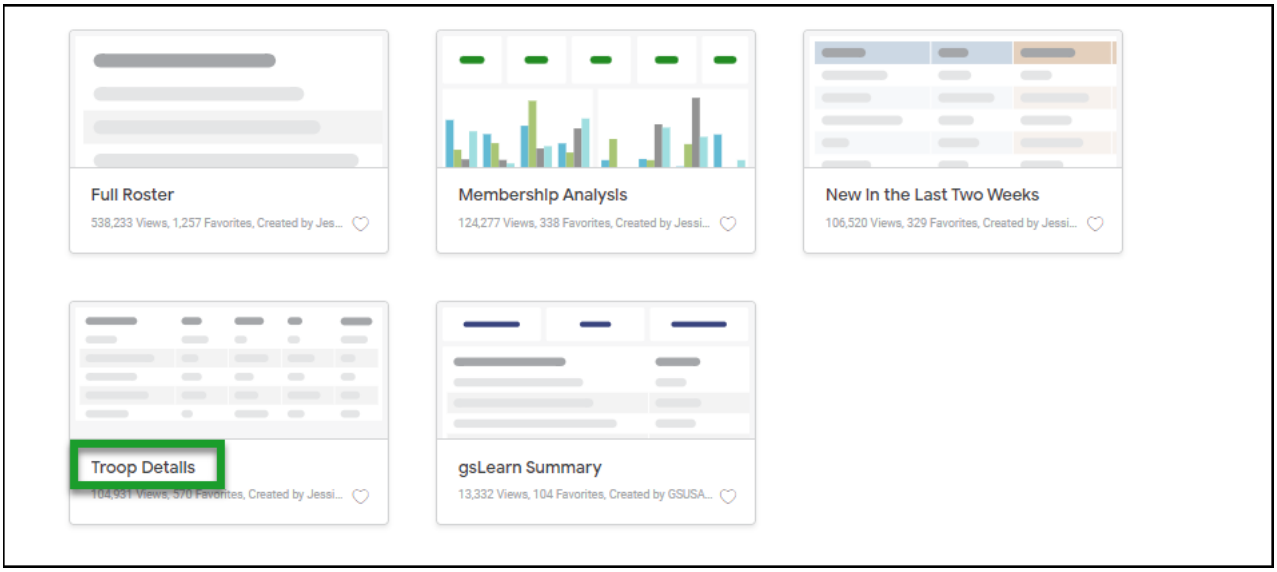
2. Review the list of filters, which allow you to narrow your results by criteria such as Year (Current or Next), Troop or Group number, Role Name, Role Active?, Is Membership New?, and Is Awaiting Placement? (Yes/No).
3. Click Update to apply filters if you made any changes.

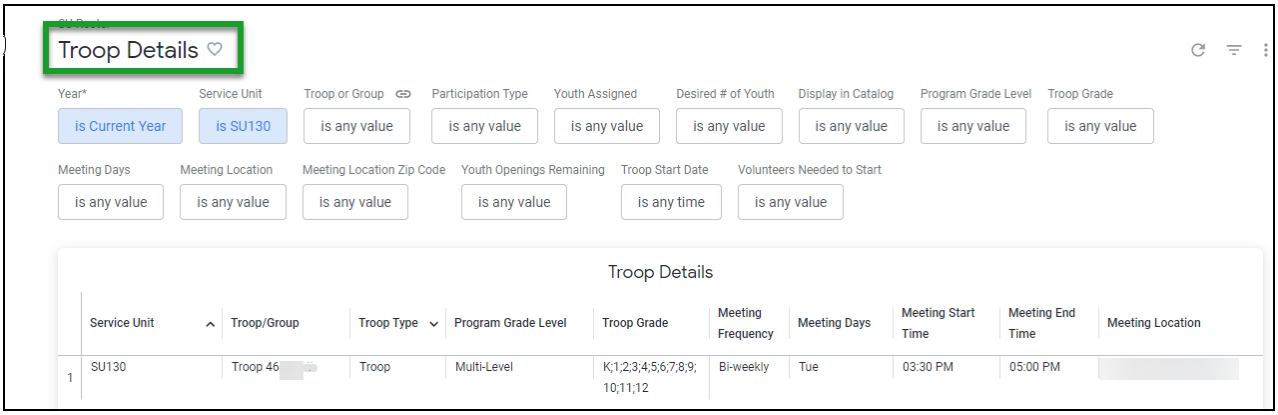
Note: Only active members will appear on this report. New members still in the process of joining, or who have not yet had their financial assistance approved, will not show on this report.

Troop Details Report

Filter for a specific troop to see its details (grade, meeting location, meeting time, number of youth and volunteers, etc).

1. On the home page, click Troop Details.





2. Review the list of filters, which allow you to narrow your results by criteria such as Year (Current or Next), Troop or Group, Program Grade Level (meaning Daisy, Brownie, Junior, etc.), Troop Grade (which grades the troop accepts), Meeting Days or Location or Zip Code, Volunteers Needed to Start, and more. Information like Program Grade Level and Troop grade are based on what the troop has most recently reported to council.

3. Click Update to apply the filters if you made any changes.

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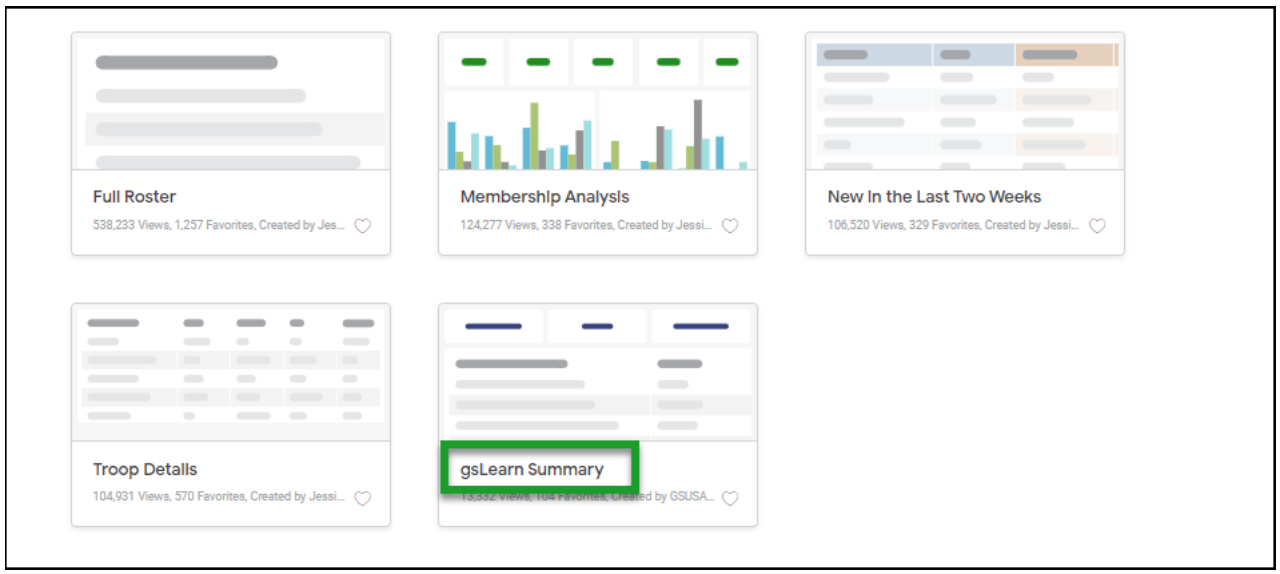
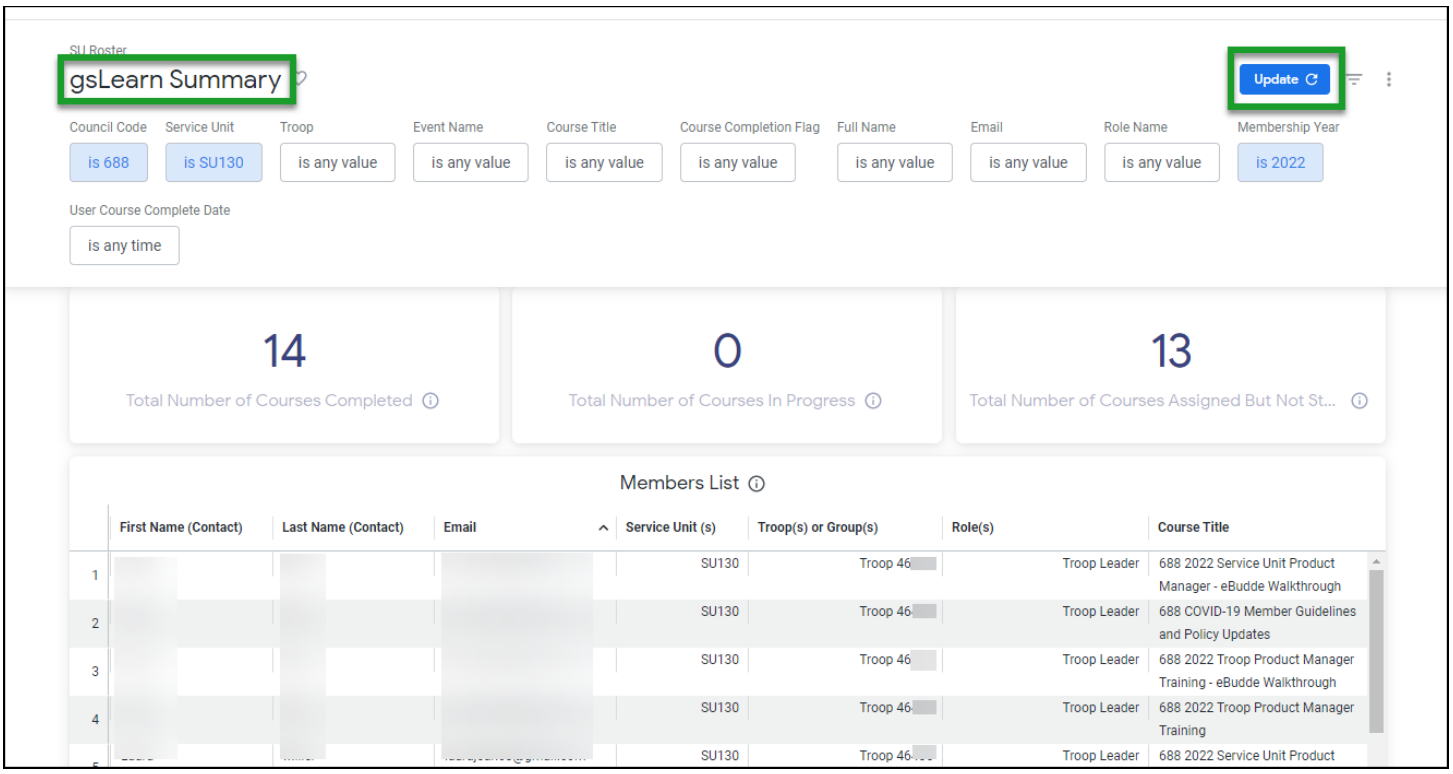
gsLearn Summary Report

A list showing the number of gsLearn courses completed, in progress, and assigned but not started for the members of the SU.

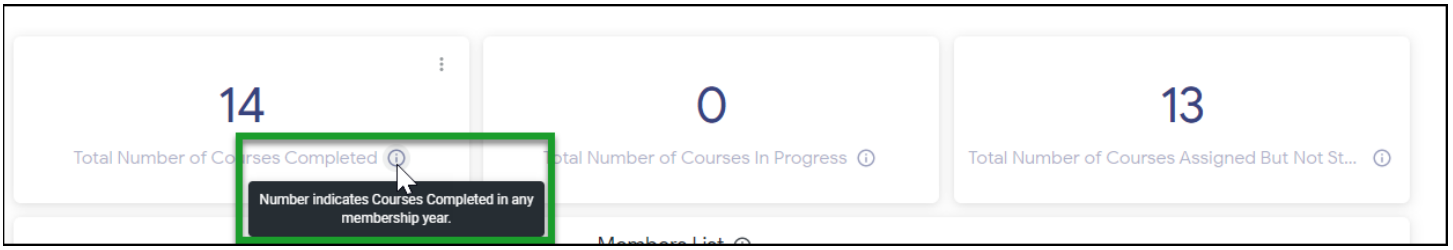
1. On the home page, click gsLearn Summary.



2. Review the list of filters that allow you to narrow your results by troop, course title, course completion, course completion date, member name, member email, member role, and membership year. Remember to click Update in the upper right corner after you change any filters.



3. You can click on the numbers on this dashboard to see more information.
4. You can also hover over the i with a circle around it in a tile to see more information about what data the number is counting.



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Tips and Troubleshooting

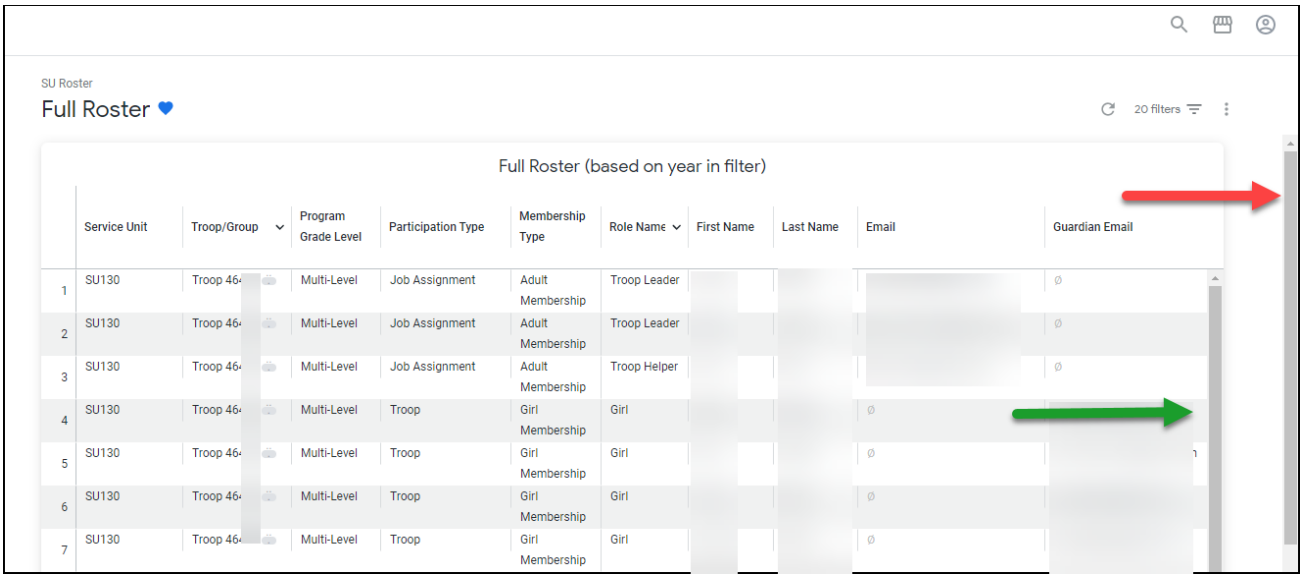
Filtering and Organizing Your Reports

- When filtering a report by troop number, remember to put a space between the word "troop" and the number.
  Example: Troop 41111, not Troop41111. If you try to search for Troop41111 you will not get any results.

- If you have added filters to your report, remember to click Update to see the filtered results. After you are done applying the filters, view your report more easily by clicking the three lines on the right side of the screen to minimize the filters.

- Click on the arrow in the title of a column to sort the report alphabetically or reverse alphabetically.

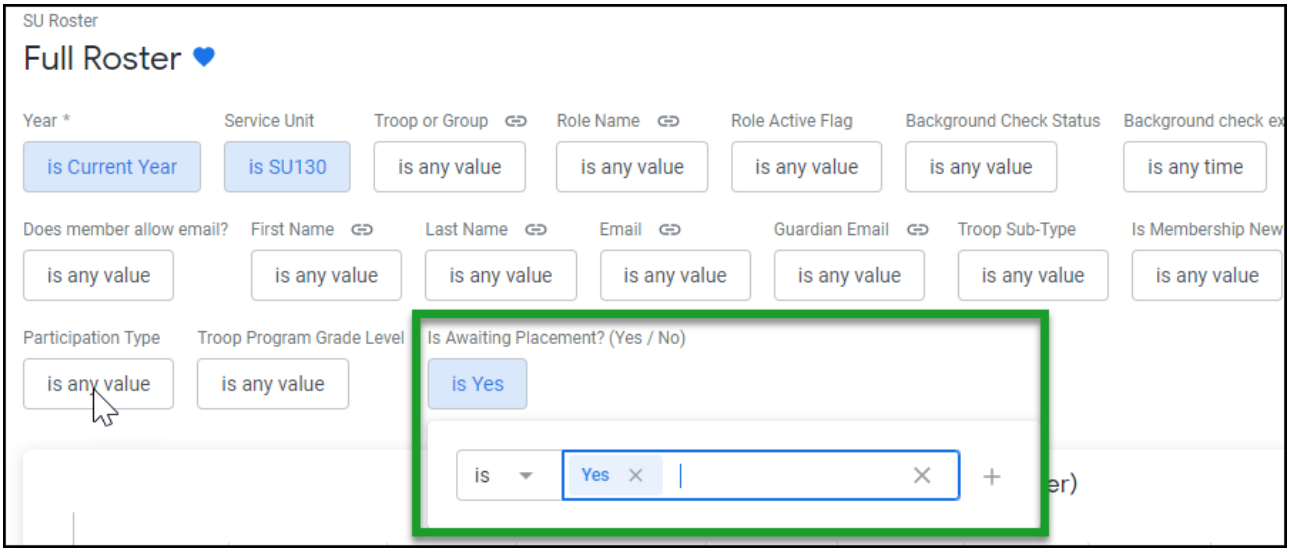
- Can't see the information on the far right of the screen? Sometimes it is a little tricky to get the left to right scroll bar to appear at the bottom of the screen. You'll notice that there are two layers of up-down scroll bars on the right side of the screen:



Drag the outer up down scroll bar (indicated by the red arrow) down to the bottom. When you reach the bottom, the left-right scroll bar will appear.

- When adding a filter, a dropdown menu appears with suggested results. However, sometimes on a slower internet connection this dropdown menu does not appear. You can run your search without the dropdown menu by typing in a value then clicking Update. If you don't get any results, check that the number you entered is correct and that you put a space between the troop name and number.

- To view youth who are Awaiting Placement, click the box below the Is Awaiting Placement? (Yes/No) and enter "Yes."

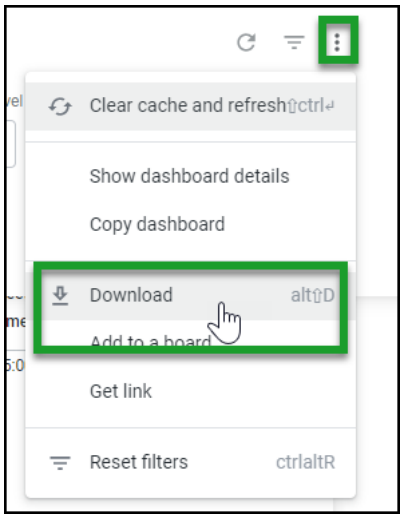


Downloading Data

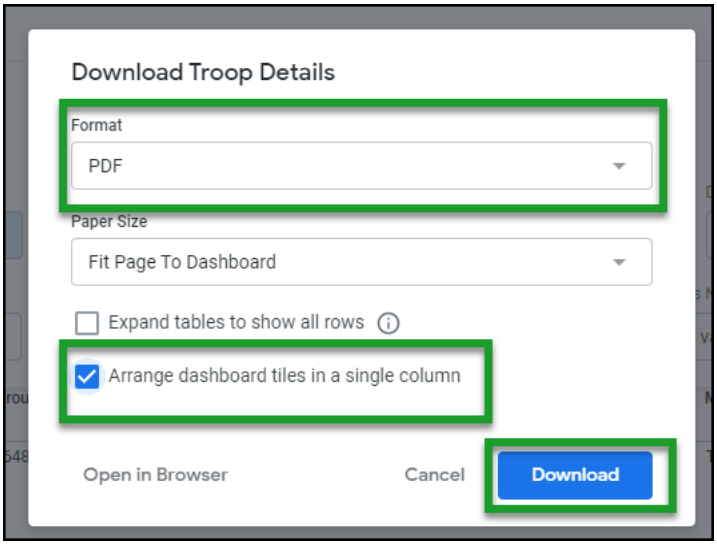
- To protect the privacy of the members of your Service Unit, only download data to your computer when necessary. The data is much more secure when it is kept within Looker.

- There is a download limit of 500 rows. If you have a Service Unit with more than 500 members, please work with your VSM or Placement Specialist to get a full downloaded roster.

- To download the data as a PDF, click on the three dots to the right of the three lines that hide/show the filters. Then click on Download…



A dialogue box will appear. If you only need basic troop and contact information for the members, do not check the Arrange dashboard tiles in a single column box. The resulting report columns will cut off at about the Zip Code column but will be easy to read. If you need all the columns, do check off the Arrange dashboard tiles in a single column before proceeding. The resulting report will have all the columns, but the text will be very small.



- When you select the CSV option, a file is downloaded to your computer containing the data. Within it will be an Excel file of your roster. All the columns will download automatically, although you will need to adjust the widths once you are in Excel.