

## Create a Member Report

The USMS registration software provides an easy way to create reports for yourself, other LMSC officers, meet directors, or club representatives.

Some examples of reports you might want to create include:

- A list of all currently-registered swimmers in the LMSC, including USMS number and club
- A list of all members who were registered last year but have not yet renewed
- A list of names and mailing addresses for a newsletter mailing
- A list of a club's currently-registered swimmers, including email address



From the ESTHER home page, select "Member Report" either from the displayed box or from the green pull-down menu



## Create a Report of Currently-Registered Members

In the following example, we will create a report of all **currently-registered LMSC members** that includes their email address, phone number, and club:

The screenshot shows three configuration sections:

- Registration Status Type:** Two radio buttons: "Registered In" (selected) and "Last Registered In".
- Registration Status:** A list of years from 2013 to 2003. The 2013 checkbox is checked, while others are unchecked.
- Report Type:** Two radio buttons: "HTML" (selected) and "Excel".

- Selecting "Registered In" includes EVERYONE registered in the selected year
- Selecting "Last Registered In" provides only the members registered in that year who have NOT renewed since that year

The "Fields to Display" section includes a search bar and a list of fields. The "Email Address" field is highlighted in red. To the right, a list of fields is shown with red 'X' marks, indicating they are selected for the report.

**Fields to Display**  
*Click an item to select it. Click that item again to remove it.*

[Select all](#)

- Birth Date
- Gender
- Reg. Date
- Reg. Year
- Address1
- Address2
- City
- State
- Zip
- Country
- Primary Phone
- Secondary Phone
- Alternate Phone
- Email Address**
- Secondary Email Address
- Coach Affiliation
- Official Affiliation

[Un-select all](#)

- ✗ Swimmer ID
- ✗ First Name
- ✗ Middle Initial
- ✗ Last Name
- ✗ LMSC
- ✗ Club Abbr.
- ✗ Reg. Number
- ✗ Workout Group

Click the "Email Address" field to include it in your report

**Fields to Display**  
 Click an item to select it. Click that item again to remove it.

*Search & hit ENTER for a field*

[Select all](#)

- Birth Date
- Gender
- Reg. Date
- Reg. Year
- Address1
- Address2
- City
- State
- Zip
- Country
- Primary Phone
- Secondary Phone
- Alternate Phone
- Secondary Email Address
- Coach Affiliation
- Official Affiliation
- Print Card?

[Un-select all](#)

- Swimmer ID
- First Name
- Middle Initial
- Last Name
- LMSC
- Club Abbr.
- Reg. Number
- Workout Group**
- Email Address

We don't need "Workout Group" in this report; click it to remove it from the list of included fields

Continue selecting and de-selecting until you have all of the desired fields included:

**Fields to Display**  
 Click an item to select it. Click that item again to remove it.

*Search & hit ENTER for a field*

[Select all](#)

- Birth Date
- Gender
- LMSC
- Reg. Number
- Reg. Date
- Reg. Year
- Workout Group
- Address1

[Un-select all](#)

- Swimmer ID
- First Name
- Middle Initial
- Last Name
- Club Abbr.
- Primary Phone
- Email Address

We want this report to display only 2013 members, so that box is checked. We want the output to be displayed on the computer screen, so **“HTML”** is selected.

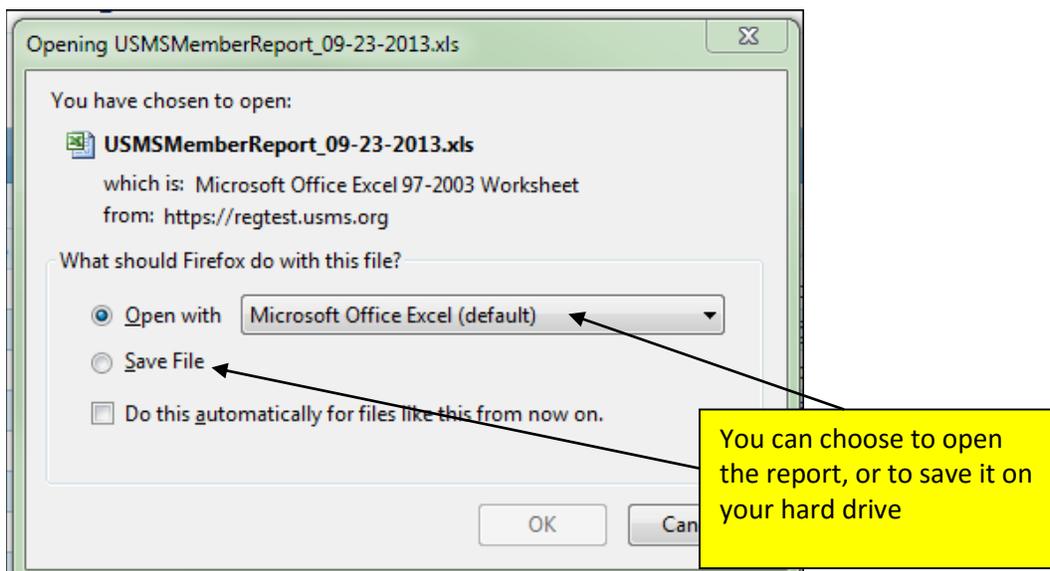
The screenshot shows a form with two main sections. On the left, under the heading "Registration Status", there is a section titled "Registered in:" with a grid of checkboxes for years from 2013 down to 2003. The checkbox for 2013 is checked. On the right, under the heading "Report Type", there are two radio buttons: "HTML" (which is selected) and "Excel". To the right of these options is a blue button labeled "Generate File". A yellow callout box with an arrow points to the "Generate File" button, containing the text "Click 'Generate File'".

The report is displayed on your **screen**. If you decide that you want to export the data to an Excel file, you may do so by clicking the **“Export to Excel”** link in the upper left corner of the report:

The screenshot shows a web interface for a "Member Report". At the top right, there is a green button that says "Compose an Email to This Group". Below this is a blue header bar with the text "Member Report". In the top left corner of the report area, there is a link "Export to Excel" which is circled in red. A yellow callout box with an arrow points to this link, containing the text "Click 'Export to Excel'". Below the header, there is a table with columns: Swimmer ID, First Name, MI, Last Name, Club, Primary Phone, and (P) Email Address. The table contains five rows of member data. At the bottom right of the table area, it says "Page 1 of 3" and "View 1 - 500 of 1,487".

Swimmer ID	First Name	MI	Last Name	Club	Primary Phone	(P) Email Address
1	03GGE	Barbara	L Thomas	PANT	(925) 684-9999	zthom@kzm.com
2	0902B	Pedro	Grilli	NCMS	(603) 437-1375	zpedroswims@usms.org
3	02SK7	Robert	G Frank	AAAS	(352) 444-8877	zfrank@pstk.com
4	048RW	Amanda	M Jones	UNAT	(888) 555-1212	zb83az@gmail.com
5	004JB	Arthur	H Smith	BOSC		zasmith@xyz.com

Clicking the **“Export to Excel”** link should bring up a window similar to this (depending on your web browser’s configuration):



## Displaying Only Members of Selected Clubs

You can restrict your reports to members of selected clubs or workout groups. To restrict the above report only to members of the Carolina Panthers club, you can select that club from the list:

**Available Clubs**  
*Click an item to select it. Click that item again to remove it.*

[Select all](#)

- Carolina Panthers (PANT)**
- Unattached (UNAT)
- All American Athletes Swimmers (AAAS)
- Boys Only Swim Club (BOSC)
- Carolina Hurricanes (HURR)
- Cary Imps (CARY)
- Fayetteville YMCA Rays Swim Team (FYRS)
- Fitness Masters Swimming Association (FMSA)
- Girls Only Swim Club (GOSC)
- North Carolina Masters Swimming (NCMS)

**Available Clubs**  
*Click an item to select it. Click that item again to remove it.*

[Select all](#)

- Unattached (UNAT)
- All American Athletes Swimmers (AAAS)
- Boys Only Swim Club (BOSC)
- Carolina Hurricanes (HURR)
- Cary Imps (CARY)
- Fayetteville YMCA Rays Swim Team (FYRS)
- Fitness Masters Swimming Association (FMSA)
- Girls Only Swim Club (GOSC)
- North Carolina Masters Swimming (NCMS)

**X Carolina Panthers (PANT)**

Note that now the output is restricted to only members of the PANT club:

[Compose an Email to This Group](#)

Member Report								
<a href="#">Export to Excel</a>		Page <b>1</b> of 1			View 1 - 3 of 3			
	Swimmer ID	First Name	MI	Last Name	Club	Reg. Year	WO Group	Primary Phone
1	060YG	<u>Mary</u>	<u>P</u>	<u>Jackson</u>	PANT	2013		(512) 306-9999
2	0902G	<u>Albert</u>		<u>Jackson</u>	PANT	2013		
3	03GGE	<u>Barbara</u>	<u>L</u>	<u>Thomas</u>	PANT	2013		(925) 684-9999

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## Filtered Report Output

There are many other customizations that you can do with the create reports tool. You can use a number of filters to narrow down the output in the report. Using a filter provides only the data that meets the criteria for that filter.

**Member Affiliations**

Certified swimming official

Coach

Check these boxes to restrict the output to either:

- members who self-identify as a certified swimming official
- or
- members who self-identify as coaching Masters swimmers

**Recordkeeping**

Registered: After  (MM/DD/YYYY)

Updated: After  (MM/DD/YYYY)

You can restrict your report to members who:

- registered before or after a date you specify
- or
- members whose records were updated before or after a date you specify

**Date for Age Computations**

Date: 05/17/2016 (MM/DD/YYYY)

Reports can include the member's age and you can specify the date to be used for the age calculation

**Subset by Age**

Greater Than Or Equal To Age

And Less Than Or Equal To Age

You can restrict the output of a report to members who are over or under a specified age

**Gender**

- Male
- Female

You can restrict the report output to only male or female members

**Information Validity**

- Bad Mailing Address
- No Valid Email on File

**Other Criteria**

- Registered Online
- Registered by Paper
- Deceased
- Not Deceased
- Valid Primary Email Address
- Allows LMCS Group Emails
- Allows National Office Group Emails

Reports can be limited to members who have any of these flags checked in the database

**Mailing Exclusions**

- Exclude from Sponsor Mail
- Exclude from *SWIMMER* Magazine
- Exclude Birthday Emails
- Exclude LMCS Group Emails
- Exclude National Office Group Emails

Reports can be limited to members who have any of these flags checked in the database

## List of all available fields that can be included in reports

Swimmer ID
First Name
Middle Initial
Last Name
Birth Date
Age
Gender
LMSC
Club Abbr.
Reg. Number
Reg. Date
Reg. Year
Workout Group
Address1
City
State
Zip
Country
Primary Phone
Secondary Phone
Alternate Phone
Email Address
Secondary Email Address

Coach Affiliation
Official Affiliation
Print Card?
SWIMMER Magazine?
Vendor Mail?
Deceased
Date of Death
Certified Coach
ALTS Instructor
Coach/ALTS Instr Designation
Vanity Permanent ID
Exclude From Birthday Emails
Exclude From LMSC Group Emails
Exclude From National Office Group Emails

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