

## How to Create a Roster Report

The image shows a navigation menu on the left with the following items: Admin, Communication, My Account, Manage My Program, Lesson Planning, Health Data, Reports, Charts, Set Custom Tags, Food Setup, NAEYC Accreditation, and Help. An arrow points from the 'Admin' tab to a callout box. Below the menu is a 'Roster Management Reports' panel with a list of report options: Withdraws and Reasons, Annual Renewals Due, Roster Forecast, Emergency Contacts, Birthday Report, and Sign-in/Sign-out Sheet. An arrow points from the 'Roster Forecast' option to another callout box. At the bottom of the panel is an 'Open Report' button.

1. Select Admin tab and then select

2. Select "Roster Forecast" Report and then "Open Report".

**Roster Management Reports**

- Withdraws and Reasons
- Annual Renewals Due
- Roster Forecast
- Emergency Contacts
- Birthday Report
- Sign-in/Sign-out Sheet

Open Report

The image shows a form titled 'Roster Forecast'. It has a 'Classroom:' field with a dropdown menu set to '\*\*All\*\*'. Below it is a 'Date:' field with a date picker set to '01/20/2021'. At the bottom left of the form are two buttons: 'Run Report' and 'Close'.

Roster Forecast

Classroom: \*\*All\*\*

Date: 01/20/2021

Run Report Close

3. Select classrooms or all classrooms. Then select "Run Report".

4. Select classrooms or all classrooms. Then select "Run Report".

5. Scroll to bottom of report and select "Excel" to export the report into an Excel document.

A row of four buttons: 'Copy', 'Excel', 'CSV', and 'PDF'. The 'Excel' button is highlighted with a blue border.

Copy Excel CSV PDF

A	B	C	D	E	F	G	H	I	J	K	L	
Class	Max	Range	Child	DOB	Mon01/18	Tue01/19	Wed01/20	Thu01/21	Fri01/22	Sat01/23	Sun01/24	
Pink	6	9 (mos) to 10 (mos)	Alana Smith	3/17/20			X	X	X			
Pink	6	9 (mos) to 10 (mos)	Andrew Lark	4/07/20				X				
Pink	6	9 (mos) to 10 (mos)	Annie Walton	3/11/20			X	X	X			
Pink	6	9 (mos) to 10 (mos)	Liam Porter	3/03/20				X				
Yellow	7	2.8 (yrs) to 4 (yrs)	Alicia Mayer	6/18/17			X	X	X			
Yellow	7	2.8 (yrs) to 4 (yrs)	Breanna Nguyen	10/07/17			X		X			
Yellow	7	2.8 (yrs) to 4 (yrs)	Cameron Cooper	3/17/18			X	X	X			
Yellow	7	2.8 (yrs) to 4 (yrs)	Priscilla Williamson	7/22/17				X				
Yellow	7	2.8 (yrs) to 4 (yrs)	Tobias Zamora	4/22/17			X	X	X			
Yellow	7	2.8 (yrs) to 4 (yrs)	Umi Ibrahim	1/28/17			X		X			
Green	8	4.1 (yrs) to 5.6 (yrs)	David Klein	12/13/16				X				
Green	8	4.1 (yrs) to 5.6 (yrs)	Henrietta Burch	6/23/15			X	X	X			
Green	8	4.1 (yrs) to 5.6 (yrs)	Jacob Pak	4/29/16			X	X	X			
Green	8	4.1 (yrs) to 5.6 (yrs)	Maria Stevens	12/19/16			X	X	X			
Green	8	4.1 (yrs) to 5.6 (yrs)	Sasha Warren	10/18/15			X		X			
Blue	12	4.7 (yrs) to 6.8 (yrs)	Bobby Simmons	3/03/14			X	X	X			
Blue	12	4.7 (yrs) to 6.8 (yrs)	Damien Snyder	9/30/14					X			
Blue	12	4.7 (yrs) to 6.8 (yrs)	Helen Moyer	7/15/14				X				
Blue	12	4.7 (yrs) to 6.8 (yrs)	Krystle Johnson	5/13/16				X	X			
Blue	12	4.7 (yrs) to 6.8 (yrs)	Melissa Stevens	12/19/14			X	X	X			
Purple	0	6.7 (yrs) to 8 (yrs)	Ally Sheppard	9/23/13			X	X	X			
Purple	0	6.7 (yrs) to 8 (yrs)	Asher Russel	4/13/13			X	X	X			
Purple	0	6.7 (yrs) to 8 (yrs)	Isiah Sherwood	5/01/14			X	X	X			
Purple	0	6.7 (yrs) to 8 (yrs)	Katie Nolan	3/12/14			X	X	X			
Purple	0	6.7 (yrs) to 8 (yrs)	Lily Cooper	6/12/13			X	X	X			
Purple	0	6.7 (yrs) to 8 (yrs)	Marissa Archer	1/31/13			X	X	X			
Unassigned/Pending	N/A	N/A	Stephanie Hill	7/13/20								
<b>TOTAL</b>		9 (mos) - 8 (yrs)	26 Assigned + 1 Unassigned					19	22	21	0	0

6. Select columns A & B and E-L and use your "delete" key.

Class	Child
Pink	Alana Smith
Pink	Andrew Lark
Pink	Annie Walton
Pink	Liam Porter
Yellow	Alicia Mayer
Yellow	Breanna Nguyen
Yellow	Cameron Cooper
Yellow	Priscilla Williamson
Yellow	Tobias Zamora
Yellow	Umi Ibrahim
Green	David Klein
Green	Henrietta Burch
Green	Jacob Pak
Green	Maria Stevens
Green	Sasha Warren
Blue	Bobby Simmons
Blue	Damien Snyder
Blue	Helen Moyer
Blue	Krystle Johnson
Blue	Melissa Stevens
Purple	Ally Sheppard
Purple	Asher Russel
Purple	Isiah Sherwood
Purple	Katie Nolan
Purple	Lily Cooper
Purple	Marissa Archer
Unassigned/Pending	Stephanie Hill
<b>TOTAL</b>	26 Assigned + 1 Unassigned

7. Go to "File" and "Print" roster.