Custom Roster Spreadsheets

This guide illustrates how to create, run, and manage Custom Roster Spreadsheet (CRS) templates, so you can compare data from multiple measures side-by-side. Once you’ve created a template, it can be rerun over and over and year after year, generating updated output with up-to-the-second accuracy as additional data is entered into the system.

CREATE A CUSTOM ROSTER SPREADSHEET TEMPLATE

Find the My Roster Templates page by starting on the myAlpine home page > select the Multiple Measures Tab > select the "My Roster Templates" link > select the green plus icon at the bottom of the Manage Rosters table > complete the template builder, broken up into five tabs.

Keep in mind that you must progress forward through the tabs one at a time, but you can jump back to a previous tab at any time.

Tab 1 - Select Measures:
Check the boxes to select the measures you want to include in your spreadsheet. Measures are organized by the sections of the site they belong to (Classes/Schedules, State Assessments, Data Warehouse, Student Plans). Selected measures will be highlighted in grey. The Student Folder is selected by default and cannot be unselected, as it includes the student and demographic information for the template. When you are done, select the "Next>" button to move to Tab 2.

Included in this Guide:
- Create a Custom Roster Spreadsheet template
- Run an existing Custom Roster Spreadsheet template
- Manage and share existing templates
- View templates shared by other users
Tab 2 – Organize Measures:
Arrange the selected measures in the order you would like them to appear on your spreadsheet. The Student Folder information always appears first. Use the arrows to move a measure up or down, or use the blue "Remove" link to remove the measure from your template. Select "Next>.”

Tab 3 – Select Fields:
Use the green double-down arrows to view the fields for each measure. Some fields will be pre-selected and cannot be unselected, as they define unique records. Other key score fields are highlighted in dark grey as suggested selections.

Check the boxes for the fields from each measure that you would like to be included in your spreadsheet. If you don’t select any fields, your spreadsheet will be blank. You can uncheck a field to remove it, and return to this tab at any time if you’d like to change your field selections. Select "Next>.”

Tab 4 – Refine Selections:
Use this tab to filter any of the selected fields, so that only a specific subset of that field’s values are included in your spreadsheet (e.g., include only grades K-5 in spreadsheet, rather than all grades). Use the green expand icon to display a field’s details and check the field values that you want to include. The system will prompt you to correct any invalid selections (e.g., no grades are selected). When done, select "Next>.”

Keep in mind that all unselected values will be filtered out—be careful not to make so many refining selections that all students and records are filtered out by your template, resulting in roster outputs that have no data.
Also, if you selected an annual assessment or an assessment that does not yet have data loaded (e.g., you run a roster in the fall, but the current year's testing won’t occur until spring), adjust the Reporting Period setting for that assessment to “2 Years” (instead of “1 Year”), so you can see the data from the previous year when you run the roster. Otherwise, the roster will not show data for that assessment, since the testing has not yet occurred or the scores have not yet been uploaded for the current year.

**Tab 5 – Review and Save:**
Name and describe your spreadsheet, and review the fields that will appear in the output in the Preview of Roster Layout Section. Looking over the output preview may prompt you to go back and make changes to the measures (Tab 1 & 2), the fields (Tab 3), and the field filters (Tab 4). If you do jump back to a previous tab, make sure to tab forward one tab at a time again, in order to make sure the system records your changes and carries them forward correctly. When you are done, select “Save.”

The roster template will now be visible on your My Roster Template page. The system will also automatically add a direct link to the template on the home page for any measure that your template uses.

**RUN AN EXISTING TEMPLATES**
To run the roster, select the yellow runner icon in the table next to the roster's name > adjust your runtime options in the window that appears.

**Anchor Year for the Report:** Select the school year for the most recent year of data that you want to see data for. The anchor year and the choice you made in Tab 4 “Reporting Period – How many years back” define how many years of data are included in the output.

**Which Students?**: Based on your current My View settings, elect whether your roster should include only students with data, only students without data, or all students (with or without data).
Output Type: Select whether you want to roster to export as an editable spreadsheet (Excel), or generate within your browser (HTML). Select "Excel" if you want to filter, sort, or edit your roster.

Which columns: Select which columns you want to include.
- Display All Columns: Include all of the columns that were selected in the template setup, including any that are blank.
- Exclude Empty Columns: Filter out columns that happen to not have data, and would otherwise be blank in the spreadsheet.
- Exclude Empty Time-Periods: Filter out entire time periods that happen to not have data and that would otherwise be blank in the spreadsheet (e.g., if the spreadsheet contains multiple seasons—fall, winter, and spring—but the spring testing has not yet happened, then none of the spring columns would appear with this option).

Order of columns: If your spreadsheet contains data from multiple years, select whether the columns should be arranged by oldest to newest or newest to oldest school year.

Group/View Name in Column: Check this box if you would like your roster to include the name of the group/view for every student in column A. This box is usually left unchecked, but is useful if you are running the spreadsheet for several groups in a row and plan to merge them together afterwards.

Multiple Records: Determine how your output should display records when a single student has more than one record in the roster (e.g., a specific student has two RTI plans within the school year or three spring STAR Math records).
- Merge into Same Cell: This tells the system to keep all of the student's
records within one row, so that every student only has one row in the spreadsheet. If a student has multiple records, the records will be listed within one expanded cell. This option is best if you will be filtering your data based on students (instead of specific data records).

- **Show as Separate Rows**: This tells the system to display a student's multiple records into separate rows—so, if one student has multiple records, each record will be given its own row. In this case, the student's identifying information will be repeated in each row, and the multiple rows will be flagged as duplicates in column A. This is a good option if you want to filter your spreadsheet based on data record (instead of students), sort your roster, or use it cross-validate information in another system.

When you've completed your adjustments, select **"Run Report."** Files exported in HTML format will generate in your browser for viewing. Files exported in Excel format can be filtered, sorted, edited, and saved like any other spreadsheet.

### MANAGE AND SHARE EXISTING TEMPLATES

**Manage Templates**

Find the My Roster Templates page by selecting the **"Multiple Measures"** drop down from the main menu bar > select the **"My Roster Templates"** link. The Manage Rosters table will display all of the templates created in your account. Use the Actions section of the table to view, edit, copy, or delete a roster.

**Share Templates**

Select the blue group icon from the table to share the template with other users. You can choose to share with all users in a specific school or with all users in the entire district, but not with an individual user.

Recipients of a shared template will only be able to run and copy the template, not edit or delete it.
Keep in mind that if you choose to save and share a particular roster with other users through your File Exchange, you may be sharing student information and records that the recipients are not authorized to view. Sharing through the Custom Roster Tool is recommended, as it ensures that users are only able to see the students and data records they are authorized to view and that rosters show the most accurate data possible every time they're run.

**VIEW TEMPLATES SHARED BY OTHER USERS**

Find the Shared Templates page by starting on the myAlpine home page > select the Multiple Measures Tab > select the "Shared Roster Templates" link. The List table will display all of the templates shared into your account by other users, as well as any templates you've created and shared to others.

Use the Actions section to run, view, copy, or hide a template. If you created the template and shared it with others, you will also see icons to edit and delete the template.