

Downloading Child Lists & Reports from BOS

To pull any of the below report types from the BOS:

1. From the home page, click the “Menu Icon” at the top left of the screen (three horizontal, parallel lines).
 2. From the main menu, click “Reports” and choose whichever report you would like to pull.
- ***Below is a list of the types of reports you can pull from within the BOS.

Types of Reports:

- Book Counts: shows how many books were mailed out by age group during a designated period of time.
- Books Mailed: reveals the names of the books being mailed in the current month.
- Child List: list of all children enrolled in your county. This is the report you start with to then sort by zip code or age group or enrollment source.
- Child Summary: shows the source of your enrollments between online and manual entry.
- Graduate Data: shows the number of children who have graduated from your program during the last 12 months (12 months determined from the day you run the report back 12 months).
- Total Books Mailed: reveals same information as Book Counts, but in bar graph/chart form.

How-to download your Child List and prepare for sorting:

1. Once you have logged into your BOS, click the “Menu Icon” at the top left of the home page (three horizontal, parallel lines).
2. From the main menu, click “Reports” and click “Child Lists.”
3. Your affiliate program should appear on the screen, click “Go.” This will download your book list into a csv document.
4. The document should appear in a minimized box at the bottom of your screen. Double click to open the document. If your document does not appear, go to the Downloads folder of your computer, and it will be there.
5. Once you have opened your child list, save the file to your computer as an Excel spreadsheet. To begin sorting the list, click on the arrow square in the upper left corner of the sheet. It should be to the left of the A column and above the first numbered row. This selects your entire sheet.
6. Click “Format” on the “Home” section of your toolbar. A drop-down menu will appear. Click “AutoFit Column Width.” This will make your sheet easier to look at and view data.

*** **We encourage you to pull your child list each month before the BOS closes to keep a “database” of children who are graduating from your program each month.**

Graduate Data Report

It displays the number of children who have graduated from your county program during the last 12 months from the day you run the report. Graduate Data provides the parent’s name and address as well as the child’s gender, birthdate, and date they joined the program, but excludes the child’s name for privacy reasons. Graduate Data gives you the opportunity to acknowledge and celebrate the children graduating from your program. From this report, you are now able to send out a mailing piece monthly, quarterly, or annually to the parents of recent graduates. Once a child has graduated from the

program, you can solicit their family for donations. Some counties also host a graduation celebration for the children in conjunction with the local library, where the children register for library cards and where donations may also be solicited. The Graduate Data report provided by the BOS does not include the child's name or parent's email address. That's why we encourage you to download your child list each month to be able to email parents of graduates.

How-to download a Graduate Report and prepare for sorting:

***** Microsoft Excel is needed**

1. From the home page, click the "Menu Icon" at the top left of the screen (three horizontal, parallel lines).
2. From the main menu, click "Reports" and click "Graduate Data."
3. On the next screen, make sure your affiliate program is in the box. Click Generate Report.
4. Once the report has generated, it will say Complete at the top. Click on the link Graduated Report to download your list.
5. The document should appear in a minimized box at the bottom of your screen. Double click to open the document. If your document does not appear, go to the Downloads folder of your computer, and it will be there.
6. Once you have opened your Graduate list, save the file to your computer as a Microsoft Excel spreadsheet. Make sure the spreadsheet is open in Microsoft Excel.
7. To begin sorting the list, click on the arrow square in the upper left corner of the sheet. It should be to the left of the A column and above the first numbered row. This selects your entire sheet.
8. Click "Format" on the "Home" section of your toolbar. A drop-down menu will appear. Click "AutoFit Column Width." This will make your sheet easier to look at and view data.

What's next? Sort your data!

Once you have downloaded your report, you can sort your child list in several ways to view your enrollments organized by:

1. Out-of-state addresses
2. Enrollment by zip-code
3. Enrollment by source
4. Enrollment by age group

How-to sort your data:

1. Make sure your child list or report is open in Microsoft Excel.
2. Click on the arrow square again to select your entire sheet.
3. Click on the "Sort" button on your toolbar, which looks like the letter Z with a downward arrow to the letter A. A drop-down menu will appear. Click "Custom Sort."
4. This is where you will choose how to sort your data.
5. *To sort for out of state addresses or enrollment by zip-codes, select the column "State" or "zip-code" fields.*
For enrollment by source, select "Additional Information #4" field.
This is the field we use to recognize enrollments from statewide sources. For example, WB for Welcome Baby or BHI for Birthing Hospital Initiative. You may also be using this field to track the source of your enrollment efforts i.e. library, enrollment fair, etc.
To sort by age group, select the column "Birthcode."

*****To find your graduates, sort the child list by Birthcode, and pull out the children who will graduate from the program by reviewing which of them are 4.5 years or older in age. Copy and paste those children into a separate Excel spreadsheet to build your own graduate listing.**