

# EMIS - Excel Reference Guide



# Create Source Data Files

Create a Source Data File from your Student Software program.

- Current Year (valid as of the day pulled)
- Previous Year (used when reviewing data that crosses over)
- Pull complete set of data with NO filters
- Frequently needed source data fields...

Legal First Name	Student Status	District Admission Date	EMIS Situation
Legal Last Name	EMIS State Grade Level	Admission Reason	District Relationship
Student Number	EMIS Grade Next Year	Admitted From IRN	How Received
EMIS ID	Building	District Withdraw Date (FS)	Percent of Time
Birthdate	State Student ID	Withdraw Reason	Attending Building IRN
Gender	Effective Start Date (FS)	Withdrawn to IRN	District of Residence
How Received IRN	Sent to Reason	Sent to IRN	Sent to Percent of Time
Disability Condition	Disadvantagement	Limited English Proficiency	Reporting Calendar
Attendance Pattern	Retained Status	Fiscal Year Began 9th	Majority of Attendance IRN
Report to EMIS	EMIS Ethnicity	Graduation Date	Math Diagnostic Result
Diploma Type	Graduation Year	County of Residence	Reading Diagnostic Result
Exempted from Phys Ed	Core Grad Requirement Exempt		Writing Diagnostic Result

**Are there other fields that you would like to include in your Source Data File, but your Student Software doesn't pull it with your main search?**

- Add additional data from other data sources...
  - Assessment files from vendors
  - Class List / Course Rosters
  - Data Collector Collection Reviews
  - ODDEX-SOES

**By combining multiple data sources into one Source Data File, EMIS crosschecks can be done in BEFORE collecting and submitting. Below are a few examples:**

- Calendars—Grade level specific, EMIS Situation
- Special Ed— Disability Condition, Dates, Assessment
- TGRG—Diagnostics, RIMPS, Assessments, Retentions

What do I do with this report??? Your source data is always the place to go to compare what is being reported to the various reports and files that come back from the Data Collector and Secure Data Center.

# V-Lookup

Reports may come back with NO student names...V-Lookup is an easy way to import names quickly.

VLOOKUP can be used for other reports as well to add additional information to create an even more data driven report.

1. Open Source Data File (**File A**) - Sort Ascending by SSID and save (Do NOT close file).
2. Open Report missing Student Names (**File B**) - Sort Ascending by SSID and save (Do NOT close file).
3. Create new workbook in **File B** and rename it SOURCE DATA.
4. Copy and paste the data from **File A** into the Source Data worksheet tab in **File B**.
5. Move State Student ID to column A (**Both files**). *Always move the SSID field to column A first in the files you will be using.*
6. Insert and label two columns for names. (**File B**)
  - A. The Insert Function pop-up should appear. Select VLOOKUP and OK.
  - B. The Function Arguments popup should now appear. DO NOT HIT ENTER/OK UNTIL ALL FOUR VALUES ARE INSERTED.
  - C. Lookup\_value - **File B**, click in Cell A2 (SSID)
  - D. Table\_array - **File A**, Highlight area that you want the LOOKUP to look at
  - E. Col\_index\_num - **File A**, 2 (column number the LAST NAME is in)
  - F. Range\_lookup - FALSE
8. Drag or copy down the VLOOKUP result to the end of column B in **File B**.
9. Follow the same steps to come up with the First Name column for File B.

1	ssid	last	first
2	IR5724489	BALLARD	LEAH
3	IW4627713	PAYTON	ALEXIS
4	JV2246202	TAGG	MARY
5	JZ7939497	BLAIR	JULE
6	KJ2701701	BROWN	ANDI
7	KM8440984	TUCKER	TONIE
8	KN3781864	PAYTON	DANIELLE
9	KO1743342	LUCAS	SUZANNE
10	KO3327576	MASSIE	LYNN
11	SD5894237	COLLINS	GEORGETTE
12	1	2	3
14	FILE A - SOURCE DATA FILE		

1	ssid	LAST NAME	FIRST NAME	LEA_IRN	BLDG_IRN	Result	Result_Description	Severity	L2_rec_t
2	IR5724489			12345		GR0000	Current graduation status		GRAD_
3	IW4627713			12345		GR0000	Current graduation status		GRAD_
4	JV2246202			12345		GR0000	Current graduation status		GRAD_
5	JZ7939497			12345		GR0000	Current graduation status		GRAD_
6	KJ2701701			12345		GR0000	Current graduation status		GRAD_
7	KM8440984			12345		GR0000	Current graduation status		GRAD_
8	KN3781864			12345		GR0000	Current graduation status		GRAD_
9	KO1743342			12345		GR0000	Current graduation status		GRAD_
10	KO3327576			12345		GR0000	Current graduation status		GRAD_
11	SD1685794								
12	NEW COLUMNS								
15	FILE B - ODE REPORT								
16	2018_GRAD_Cohort-Non-EOC-Pts-Detail								

**7A & B**

B2 =

1	ssid	LAST NAME	FIRST NAME	LEA_IRN	BLDG_IRN	Result	Result_Description	Severity	L2_rec_type	cohort_year
2	IR5724489			12345		GR0000	Current graduation status	I	GRAD_0003	2018
3	IW4627713			12345		GR0000	Current graduation status	I	GRAD_0003	2018
4	JV2246202			12345		GR0000	Current graduation status	I	GRAD_0003	2018
5	JZ7939497								0003	2018
6	KJ2701701								0003	2018
7	KM8440984								0003	2018
8	KN3781864								0003	2018
9	KO1743342								0003	2018
10	KO3327576								0003	2018
11	SD1685794								0003	2018
12		NEW COLUMNS								

**Insert Function**

Search for a function:

Type a brief description of what you want to do and then click Go

Or select a category: Most Recently Used

Select a function:

- VLOOKUP
- IF
- SUBTOTAL
- SUM
- AVERAGE
- HYPERLINK
- COUNT

**VLOOKUP(lookup\_value,table\_array,col\_index\_num,range\_lookup)**  
Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.

Help on this function

OK Cancel

**7C**

A2 =VLOOKUP(A2)

1	ssid	LAST NAME	FIRST NAME	LEA_IRN	BLDG_IRN	Result	Result_Description	Severity	L2_rec_type	cohort_year
2	IR5724489			12345		GR0000	Current graduation status	I	GRAD_0003	2018
3	IW4627713			12345		GR0000	Current graduation status	I	GRAD_0003	2018
4	JV2246202			12345		GR0000	Current graduation status	I	GRAD_0003	2018
5	JZ7939497			12345		GR0000	Current graduation status	I	GRAD_0003	2018
6	KJ2701701									
7	KM8440984									
8	KN3781864									
9	KO1743342									
10	KO3327576									
11	SD1685794									
12		NEW COLUMNS								

**Function Arguments**

**VLOOKUP**

Lookup\_value: A2 = "IR5724489"

Table\_array: = range: (empty)

Col\_index\_num: = number: (empty)

Range\_lookup: = logical: (empty)

Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.

**7F**

B2 =VLOOKUP(A2,'SOURCE DATA'!A1:C11,2,FALSE)

1	ssid	LAST NAME	FIRST NAME	LEA_IRN	BLDG_IRN	Result	Result_Description	Severity	L2_rec_type	cohort_year
2	IR5724489	BALLARD	LEAH	12345		GR0000	Current graduation status	I	GRAD_0003	2018
3	IW4627713	PAYTON	ALEXIS	12345		GR0000	Current graduation status	I	GRAD_0003	2018
4	JV2246202	TAGG	MARY	12345		GR0000	Current graduation status	I	GRAD_0003	2018
5	JZ7939497	BLAIR	JULE	12345		GR0000	Current graduation status	I	GRAD_0003	2018
6	KJ2701701	BROWN	ANDI							
7	KM8440984	TUCKER	TONI							
8	KN3781864	PAYTON	DANI							
9	KO1743342	LUCAS	SUZA							
10	KO3327576	MASSIE	LYNN							
11	SD1685794	COLLINS	GEO							
12		NEW COLUMNS								

**Function Arguments**

**VLOOKUP**

Lookup\_value: A2 = "IR5724489"

Table\_array: 'SOURCE DATA'!A1:C11 = {"ssid","last","first";"IR5724489","BALLARD","LEAH";"IW4627713","PAYTON","ALEXIS";"JV2246202","TAGG","MARY";"JZ7939497","BLAIR","JULE";"KJ2701701","BROWN","ANDI";"KM8440984","TUCKER","TONI";"KN3781864","PAYTON","DANI";"KO1743342","LUCAS","SUZA";"KO3327576","MASSIE","LYNN";"SD1685794","COLLINS","GEO"}

Col\_index\_num: 2 = 2

Range\_lookup: FALSE = FALSE

Formula result = BALLARD

**7D**

A1 =VLOOKUP(A2,'SOURCE DATA'!A1:C11)

1	ssid	LAST NAME	FIRST NAME	LEA_IRN	BLDG_IRN	Result	Result_Description	Severity	L2_rec_type	cohort_year
2	IR5724489	BALLARD	LEAH	12345		GR0000	Current graduation status	I	GRAD_0003	2018
3	IW4627713	PAYTON	ALEXIS	12345		GR0000	Current graduation status	I	GRAD_0003	2018
4	JV2246202	TAGG	MARY	12345		GR0000	Current graduation status	I	GRAD_0003	2018
5	JZ7939497	BLAIR	JULE	12345		GR0000	Current graduation status	I	GRAD_0003	2018
6	KJ2701701	BROWN	ANDI							
7	KM8440984	TUCKER	TONI							
8	KN3781864	PAYTON	DANI							
9	KO1743342	LUCAS	SUZA							
10	KO3327576	MASSIE	LYNN							
11	SD5894237	COLLINS	GEO							
12		NEW COLUMNS								

**Function Arguments**

**VLOOKUP**

Lookup\_value: A2 = "IR5724489"

Table\_array: 'SOURCE DATA'!A1:C11 = {"ssid","last","first";"IR5724489","BALLARD","LEAH";"IW4627713","PAYTON","ALEXIS";"JV2246202","TAGG","MARY";"JZ7939497","BLAIR","JULE";"KJ2701701","BROWN","ANDI";"KM8440984","TUCKER","TONI";"KN3781864","PAYTON","DANI";"KO1743342","LUCAS","SUZA";"KO3327576","MASSIE","LYNN";"SD5894237","COLLINS","GEO"}

Col\_index\_num: 1 = 1

Range\_lookup: = logical: (empty)

Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.

**7E**

1	ssid	last	first
2	IR5724489	BALLARD	LEAH
3	IW4627713	PAYTON	ALEXIS
4	JV2246202	TAGG	MARY
5	JZ7939497	BLAIR	JULE
6	KJ2701701	BROWN	ANDI
7	KM8440984	TUCKER	TONI
8	KN3781864	PAYTON	DANI
9	KO1743342	LUCAS	SUZA
10	KO3327576	MASSIE	LYNN
11	SD5894237	COLLINS	GEO
12		NEW COLUMNS	

**Function Arguments**

**VLOOKUP**

Lookup\_value: A2 = "IR5724489"

Table\_array: 'SOURCE DATA'!A1:C11 = {"ssid","last","first";"IR5724489","BALLARD","LEAH";"IW4627713","PAYTON","ALEXIS";"JV2246202","TAGG","MARY";"JZ7939497","BLAIR","JULE";"KJ2701701","BROWN","ANDI";"KM8440984","TUCKER","TONI";"KN3781864","PAYTON","DANI";"KO1743342","LUCAS","SUZA";"KO3327576","MASSIE","LYNN";"SD5894237","COLLINS","GEO"}

Col\_index\_num: 2 = 2

Range\_lookup: = logical: (empty)

Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.

**7G**

1	ssid	LAST NAME	FIRST NAME	LEA_IRN	BLDG_IRN
2	IR5724489	BALLARD		12345	
3	IW4627713	PAYTON		12345	
4	JV2246202	TAGG		12345	
5	JZ7939497	BLAIR		12345	
6	KJ2701701	BROWN		12345	
7	KM8440984	TUCKER		12345	
8	KN3781864	PAYTON		12345	
9	KO1743342	LUCAS		12345	
10	KO3327576	MASSIE		12345	
11	SD1685794	#N/A			
12		NEW COLUMNS			

**FILE B - ODE REPORT**  
**2018\_GRAD\_Cohort-Non-EOC-Pts-Detail**

**8**



# Conditional Formatting

Missing something that you don't know you're missing?

Use Conditional formatting to highlight who is on both reports...and find out who isn't.

## K-3 Literacy SDC List VS Source Data List

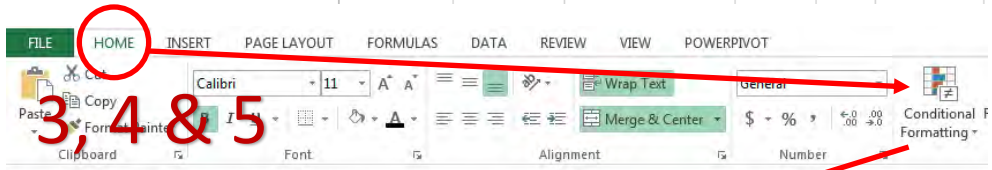
- Source Data—Main Report
  - Known SSID's—SDC List
1. Copy and paste the list of known SSID's at the bottom of your main report.
  2. Select Column A (SSID's to compare)
  3. Go to Home > Conditional Formatting > Highlight Cell Rules > Duplicate Values
  4. At the Duplicate Values prompt, it should default to "Duplicate" values with "Light Red Fill with Dark Red Text". Select "OK"
  5. All SSID's that are in the SDC List will be highlighted in light red and have dark red text.
  6. Are students counting that should count? Who is missing? Who is on the list but shouldn't be?

	A	B	C	D	E	F
1	SSID	FIRST	LAST	SID	GR	FS
17	TQ2125671	William	Harrison	987654	KG	8/1/2014
25	TR5062617	Alyssa	Grant	876543	KG	8/28/2014
26	MB9688293	Ruth	Hayes	765432	KG	7/1/2014
36	WU2305313	James	Garfield	654321	KG	8/1/2014
38	CK3668609	Ben	Harrison	543210	KG	8/1/2014
40	CJ7229552	William	McKinley	123456	KG	8/1/2014
46	VM7927262	Bill	Taft	234567	KG	8/1/2014
49	TS6868102	Andrew	Jackson	345678	KG	8/1/2014
52	TQ4781614	Warren	Harding	456789	KG	8/1/2014
66	TT1604257	George	Washington	567890	KG	8/1/2014
69	TY8773410	Abe	Lincoln	321654	KG	8/1/2014
141						
142	CJ7229552					
143	CK3668609					
144	EF3553572					
145	IG8556609					
146	PH5766445					
147	TN2423580					
148	TR5062617					
149	TS6868102					
150	TT1604257					
151	TY8773410					

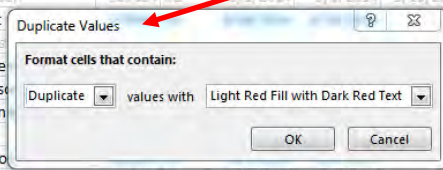
1 & 2

Source Data List

SDC List



3, 4 & 5



	A	B	C	D	E	F	G	H	I	J	K	L
1	SSID	FIRST	LAST	SID	GR	FS	ADM	WD	EMIS	RETAIN	TGRD	RIMP
17	TQ2125671	William	Harrison	987654	KG	8/1/2014	8/1/2014	3/16/2015	100 *		NO	152505
25	TR5062617	Alyssa	Grant	876543	KG	8/28/2014	8/28/2014		100 *		NO	152505
26	MB9688293	Ruth	Hayes	765432	KG	7/1/2014			96 *		NO	152505
36	WU2305313	James	Garfield	654321	KG	8/1/2014	8/1/2014		5 *		NO	152505
38	CK3668609	Ben	Harrison	543210	KG	8/1/2014	8/1/2014		5 *		NO	152505
40	CJ7229552	William	McKinley	123456	KG	8/1/2014	8/1/2014		5 *		NO	152505
46	VM7927262	Bill	Taft	234567	KG	8/1/2014	8/1/2014		5 *		NO	152505
49	TS6868102	Andrew	Jackson	345678	KG	8/1/2014	8/1/2014		5 *		NO	152505
52	TQ4781614	Warren	Harding	456789	KG	8/1/2014	8/1/2014		100 *		NO	152505
66	TT1604257	George	Washington	567890	KG	8/1/2014	8/1/2014		96 *		NO	152505
69	TY8773410	Abe	Lincoln	321654	KG	8/1/2014	8/1/2014		5 *		NO	152505
141												
142	CJ7229552											
143	CK3668609											
144	EF3553572											
145	IG8556609											
146	PH5766445											
147	TN2423580											
148	TR5062617											
149	TS6868102											
150	TT1604257											
151	TY8773410											

6

# Pivot Table

Need a quick summary analysis of data? Start small and work your way up to complex Pivot Tables.

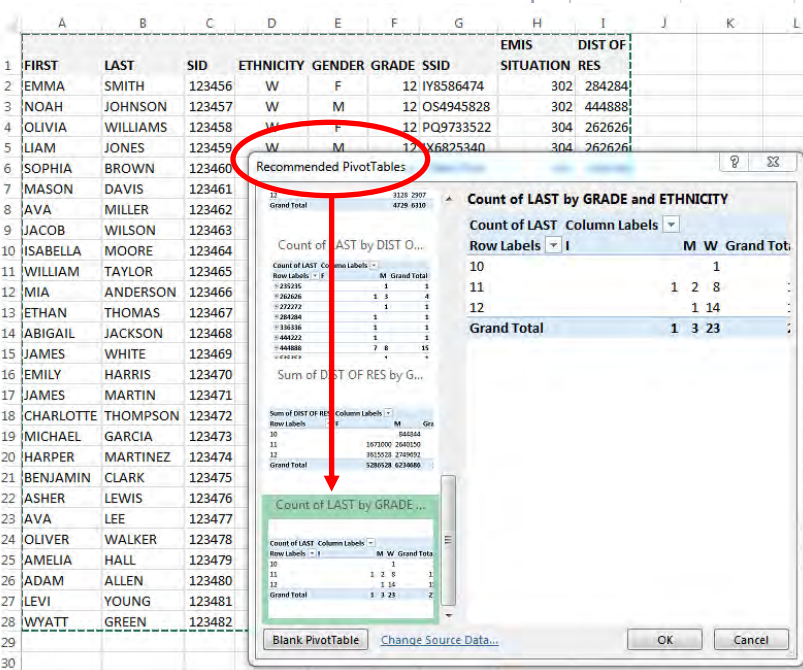
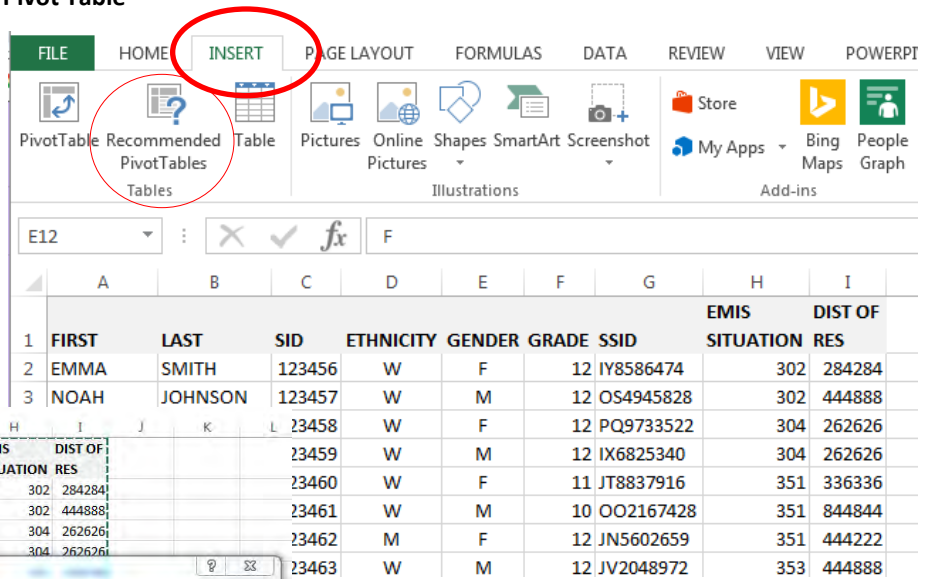
Sample source data for this example is from a Career Center and includes the following fields:

First Name—Last Name—Student ID—Ethnicity—Gender—Grade—SSID—EMIS Situation—District of Residence

Summary we want to see: Ethnicity By Grade Level

Two options of creating a Pivot Table are “Recommended Pivot Table” and “Manually create Pivot Table”. Both can be found under **Insert > Tables > Recommended Pivot Table** or **Pivot Table**

By selecting “Recommended Pivot Table”, you are able to hover over different pre-selected views of potential Pivot Tables. A new worksheet tab will open at the bottom of your document and the recommended Pivot Table will drop in.



This particular Pivot Table recommendation will show the Ethnicity by Grade Levels.

Row = Grade Level

Column = Ethnicity

Values = Total by Last (Name)

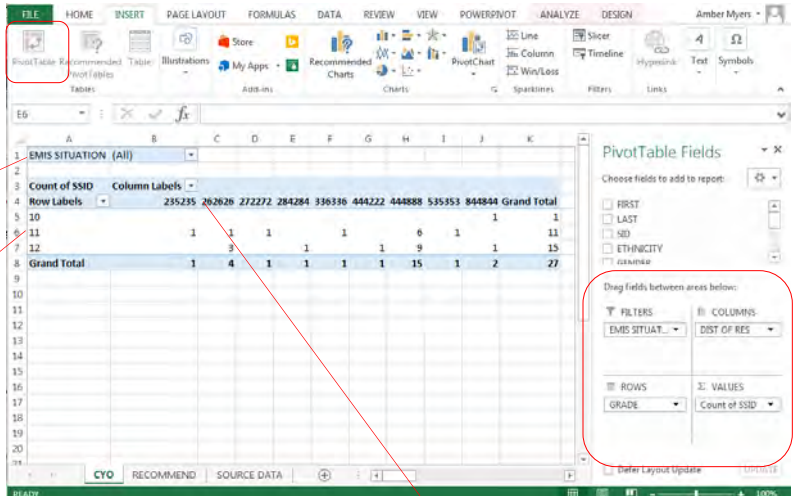
Fields can be moved between Filters, Columns, Rows and Values to give a different look to the table.

Count of LAST	Column Labels			
Row Labels	I	M	W	Grand Total
10			1	1
11		1	2	8
12		1	1	15
<b>Grand Total</b>	<b>1</b>	<b>3</b>	<b>23</b>	<b>27</b>

# Pivot Table (continued)

Creating your own Pivot Table can be intimidating, but the more you work with it and know what you want to see as an end result the more comfortable you will be.

This Pivot Table created manually allows the user to filter by EMIS Situation, Grade Level, or District of Residence.



Count of SSID	Column Labels			
Row Labels	262626	444888	Grand Total	
11	1	1	2	
12		1	1	
Grand Total	1	2	3	

Count of SSID	Column Labels					
Row Labels	262626	284284	444222	444888	844844	Grand Total
12	3	1	1	9	1	15
Grand Total	3	1	1	9	1	15

Count of SSID	Column Labels			
Row Labels	235235	444222	844844	Grand Total
10			1	1
11		1		1
12			1	1
Grand Total	1	1	2	4

By creating Pivot Tables, your Source Data always remains untouched unless you are in that worksheet making changes.

## Additional EMIS Tips, Tricks & Shortcuts

1. Need to change student names from all upper case to "Proper" case?

- Insert additional column(s) next to the names.
- In cell C2, type =PROPER(A2)
- In cell D2, type =PROPER(B2)
- HARRY POTTER should now be Harry Potter

	A	B	C	D
1	FIRST	LAST	Proper First Name	Proper Last Name
2	HARRY	POTTER	Harry	Potter
3	KATIE	BELL		
4	AMELIA	BONES		
5	LAVENDAR	BROWN		
6	ARGUS	FILCH		

2. How to calculate how many days are between two dates?

- D2 = Beginning of the school year (8/17/16)
- E2 = End Date (2/1/17)
- In cell F2, type =DAYS(E2,D2)
- The total number of calendar days will populate. Drag the result down the column to fill in the rest of the fields.

### TGRG Diagnostics 30-day Rule

	A	B	C	D	E	F
1	FIRST	LAST	SID	FS Start Date	End/Withdraw Date	Calendar Days
2	HARRY	POTTER	555649	8/17/2016	2/1/2017	168
3	KATIE	BELL	555231	8/17/2016	2/1/2017	168
4	AMELIA	BONES	555899	8/17/2016	2/1/2017	168
5	LAVENDAR	BROWN	555748	12/1/2016	2/1/2017	62
6	ARGUS	FILCH	555694	10/9/2016	2/1/2017	115

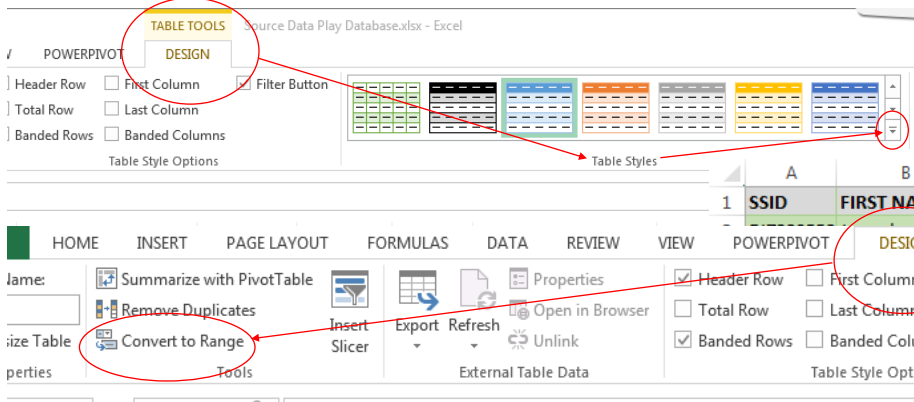
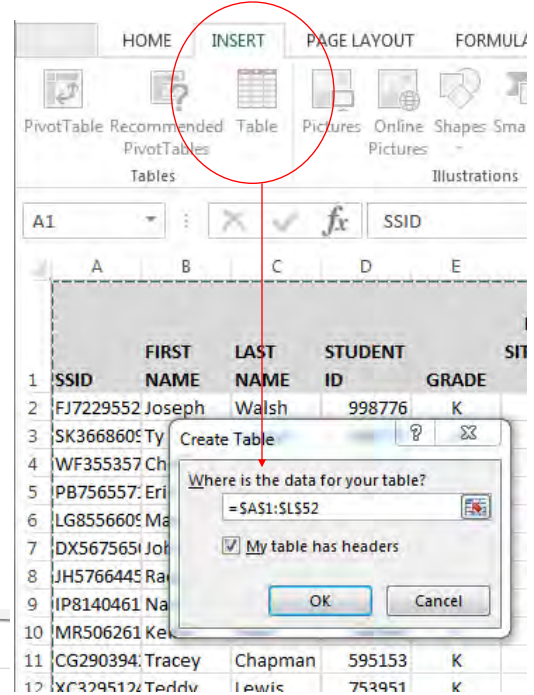




# Additional EMIS Tips, Tricks & Shortcuts

5. Have a large amount of data that you would like to see as a table?

- Open your worksheet and select **INSERT > TABLE**
- The range of data to be included in the table will auto-populate. Click OK.
- Your worksheet will now be in a Table format. You can select various types by going to **TABLE TOOLS > DESIGN > TABLE STYLES**.
- To change the table back to a worksheet with no filters but keeping the style of the table, you would select **TABLE TOOLS > DESIGN > Tools > Convert to Range**.
- When converting back to a worksheet a pop-up will appear asking if you want to convert the table to a normal range. Select YES.
- You'll notice the filters are gone, but the table style remains.

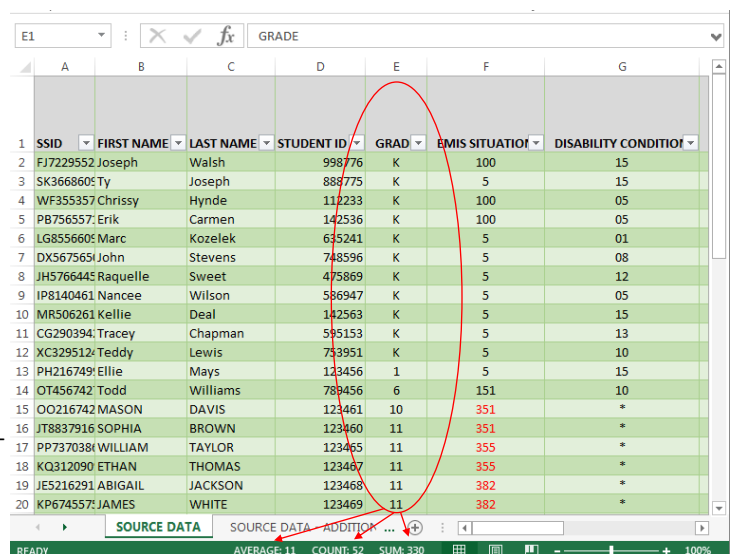


New Table Style converted back to worksheet.

SSID	FIRST NAME	LAST NAME	STUDENT ID	GRADE	EMIS SITUATION	
	Walsh		998776	K	10	
	Joseph		888775	K	5	
	Hynde		112233	K	10	
	Carmen		142536	K	10	
	Kozelek		635241	K	5	
	Stevens		748596	K	5	
	Sweet		475869	K	5	
9	IP8140461	Nancee	Wilson	586947	K	5
10	MR506261	Kellie	Deal	142563	K	5
	CG290394	Tracey	Chapman	595153	K	5

6. Want a quick AVERAGE, COUNT, or SUM of a column?

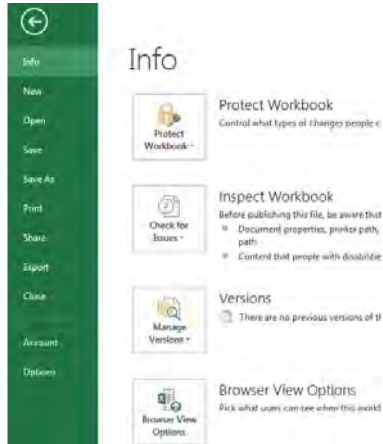
- Highlight the column that you would like this data on.
- Look in the bottom right corner of the worksheet and the AVERAGE, COUNT and/or SUM will appear.
- AVERAGE is the average of the selected cells.
- COUNT is the number of selected cells that contain data.
- SUM is the sum of the selected cells
- To add additional settings to the Status Bar, right click anywhere in the bar and check or un-check what you would like to see.



# Which Tab is it under???

## FILE

- Info
- New
- Open
- Save
- Save As
- Print



## Frequently Used Tools for EMIS

### HOME

- Fill color
- Text Color
- Wrap Text
- Conditional Formatting
- Sort & Filter

### DATA

- Sort
- Filter
- Text to Columns

### VIEW

- Page Break Preview
- Zoom
- Arrange all
- Freeze Panes

### INSERT

- Pivot Table
- Text Box

### FORMULAS

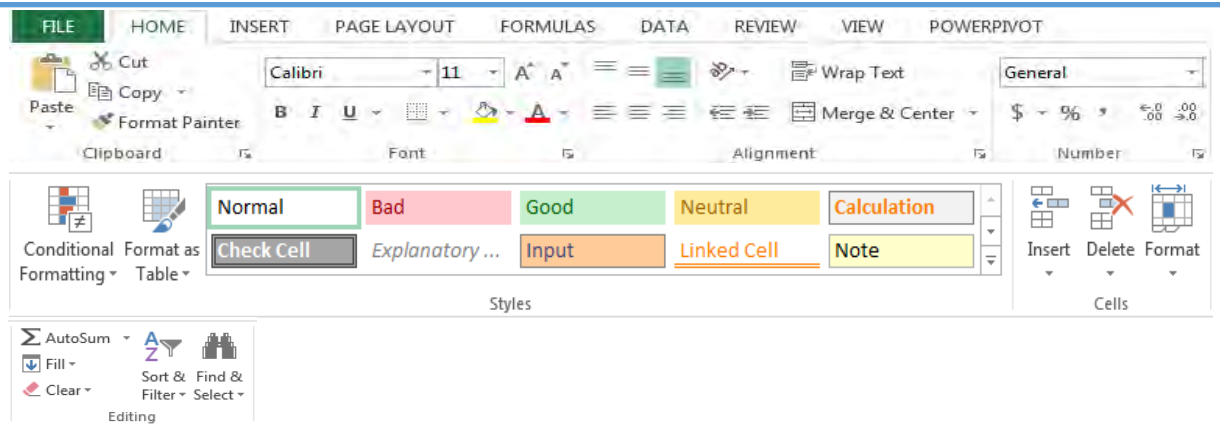
- Insert Function
- AutoSum

### PAGE LAYOUT

- Themes
- Orientation

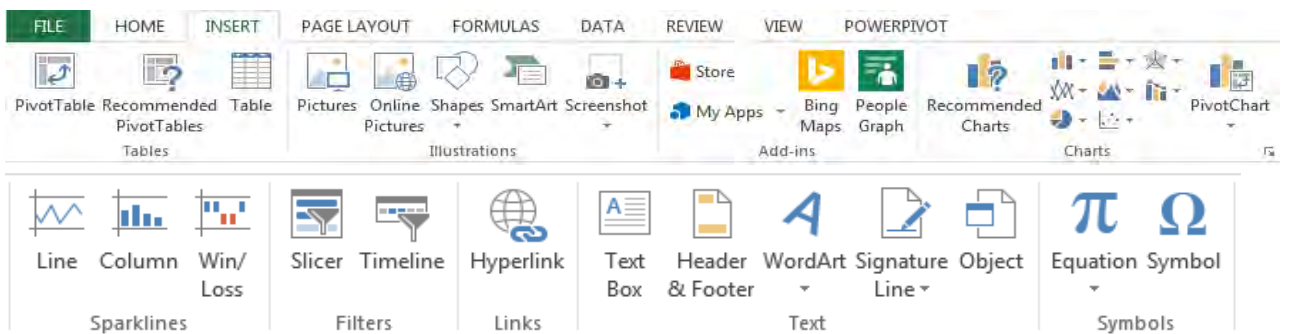
## HOME

- Clipboard
- Font
- Alignment
- Number
- Styles
- Cells
- Editing



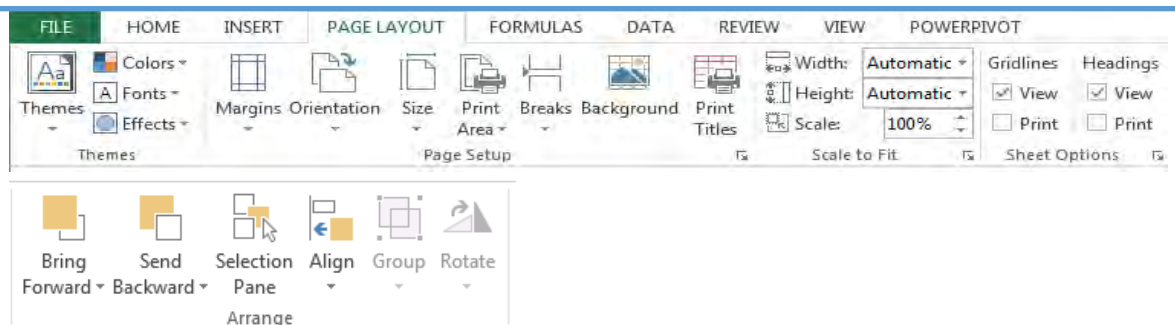
## INSERT

- Tables
- Add-Ins
- Charts
- Sparklines
- Filters
- Links
- Text
- Symbols



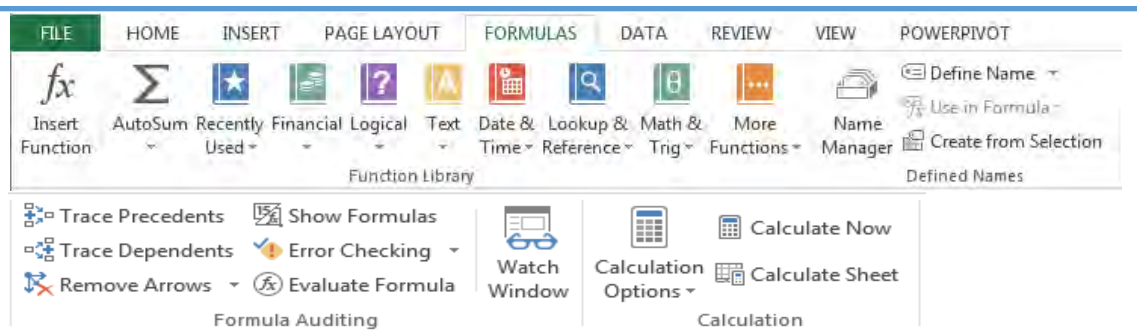
## PAGE LAYOUT

- Themes
- Page Setup
- Scale to Fit
- Sheet Options
- Arrange



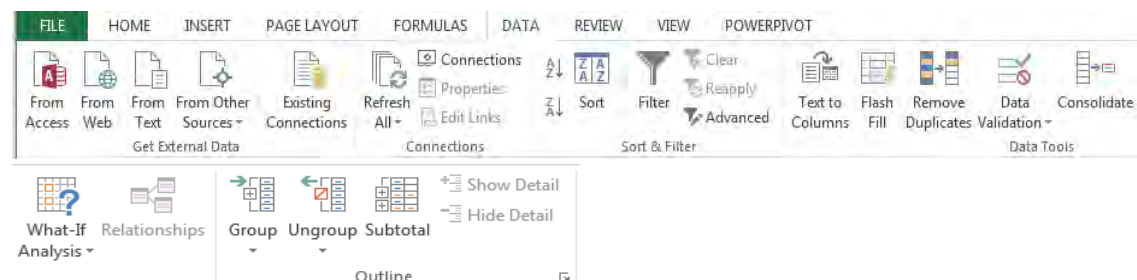
## FORMULAS

- Function Library
- Defined Names
- Formula Auditing
- Calculation



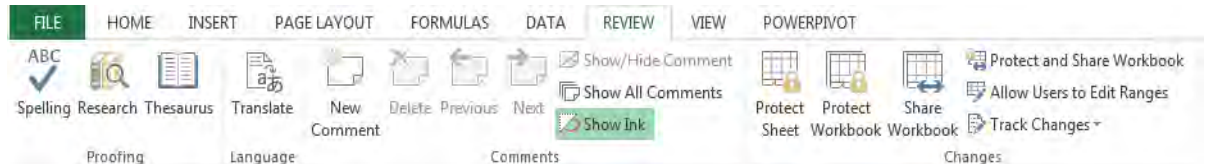
## DATA

- Get External Data
- Connections
- Sort & Filter
- Data Tools
- Outline



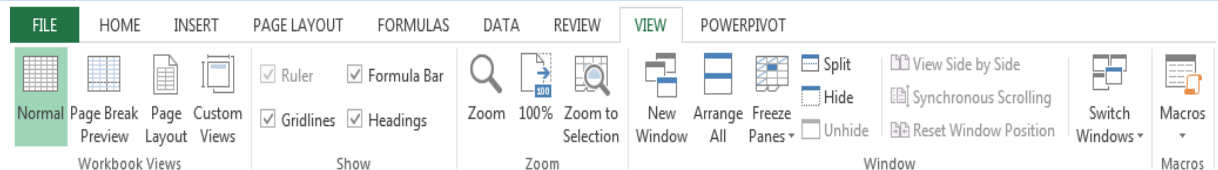
## REVIEW

- Proofing
- Language
- Comments
- Changes



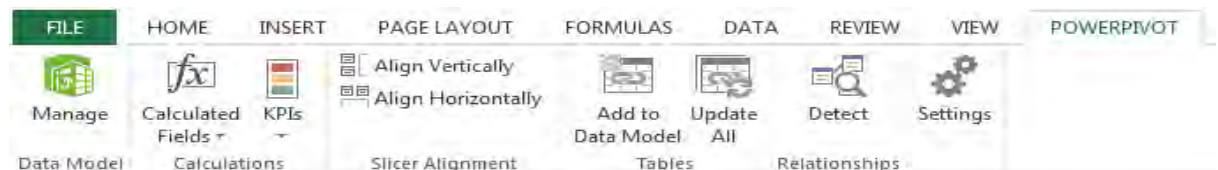
## VIEW

- Workbook Views
- Show
- Zoom
- Window
- Macros

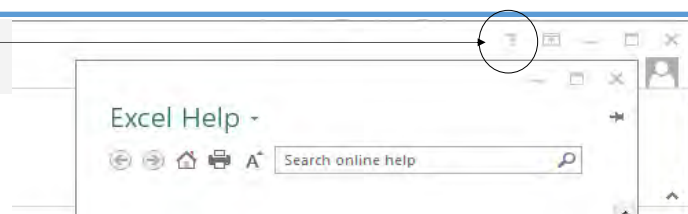


## POWERPIVOT

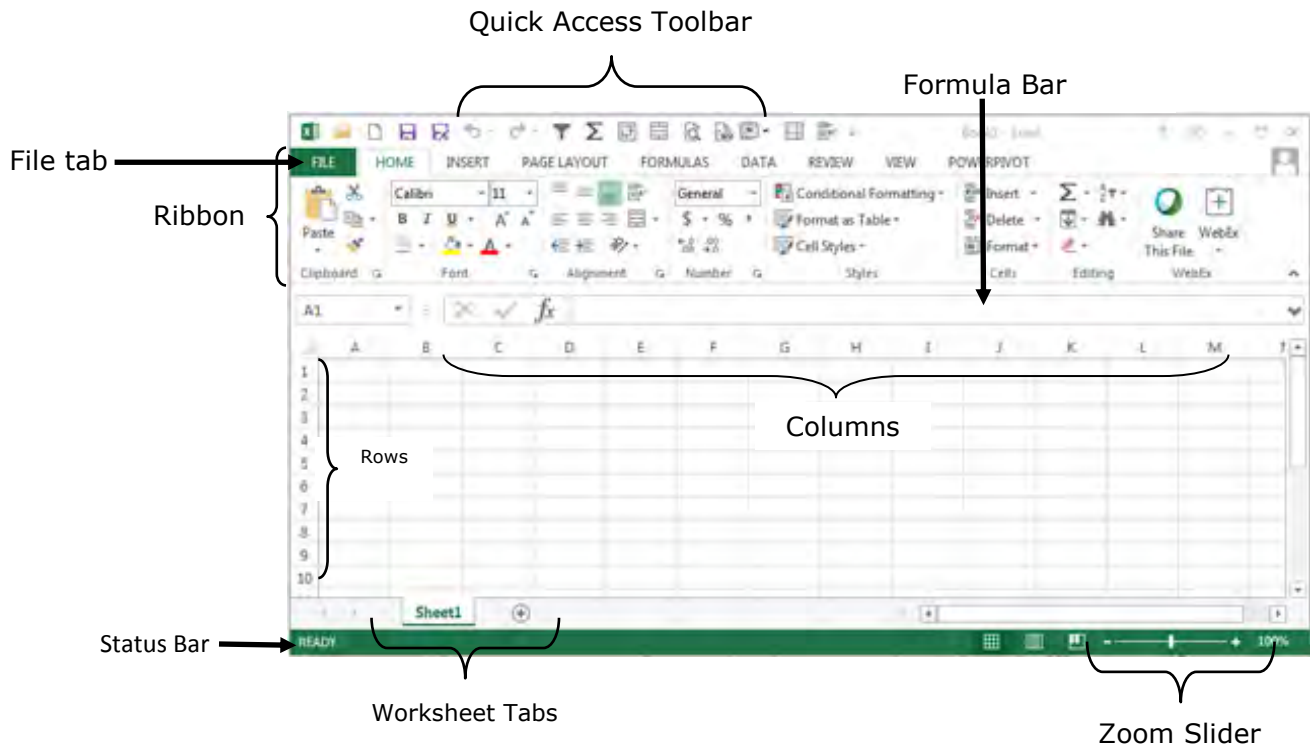
- Data Model
- Calculations
- Slicer Alignment
- Tables
- Relationships
- Settings



When in doubt... "HELP" yourself out with Excel Help.



# Excel Reference Guide



## Keyboard Shortcuts

Open Workbook	<Ctrl>	+	< O >	To Cell A1	<Ctrl>	+	<Home>
Create New Workbook	<Ctrl>	+	< N >	To Last Cell	<Ctrl>	+	<End>
Save	<Ctrl>	+	< S >	Cut	<Ctrl>	+	< X >
Preview and Print	<Ctrl>	+	< P >	Copy	<Ctrl>	+	< C >
Close Workbook	<Ctrl>	+	< W >	Paste	<Ctrl>	+	< V >
Right One Cell	<Tab>			Undo	<Ctrl>	+	< Z >
Left One Cell	<Shift>	+	<Tab>	Redo	<Ctrl>	+	< Y >
Up One Cell	<Shift>	+	Enter	Find	<Ctrl>	+	< F >
Select All	<Ctrl>	+	< A >	Replace	<Ctrl>	+	< H >
Select Entire Row	<Shift>	+	<Space>	Bold	<Ctrl>	+	< B >
Select entire column	<Ctrl>	+	<Space>	Italics	<Ctrl>	+	< I >
Fill Right	<Ctrl>	+	< R >	Underline	<Ctrl>	+	< U >

**\*\*Short cut to frequently used items, "Right Click"\*\*\***

- Copy, Cut, Paste, Font Size, Font Color, Fill Color are just a few options available when you right click in your workbook or cell.