

# Using Excel to Troubleshoot EMIS Data



## Overview

- Basic Excel techniques can be used to analyze EMIS data from Student Information Systems (SISs), from the Data Collector, and on ODE EMIS reports
- This session will demonstrate Excel functions and practical applications that can be helpful in all phases of the EMIS data review process



## Outline

- ODDEX Student Cross Reference (SCR) Export
- Calendar and Student Data Comparison
- Staff Data Formatting to Share with District Staff
- FTE Detail Report Subtotaling
- FTE Detail Report PivotTable



## ODDEX SCR Export



# ODDEX SCR Export Text File

Choose to "Exclude Inactive" or "Exclude Hidden" records

In the SCR, select a "Display Mode" and "Find" and the students will appear below

Select "Export" to generate a text file

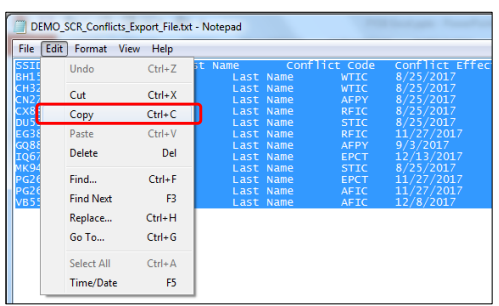
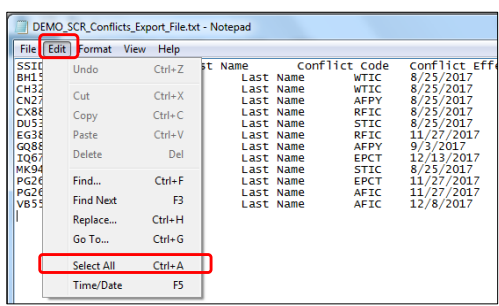
SSID	Last Name	First Name	Birth Date	Conflict Code	Relationships
				AFPY	
				AFPY	



# SCR Text File

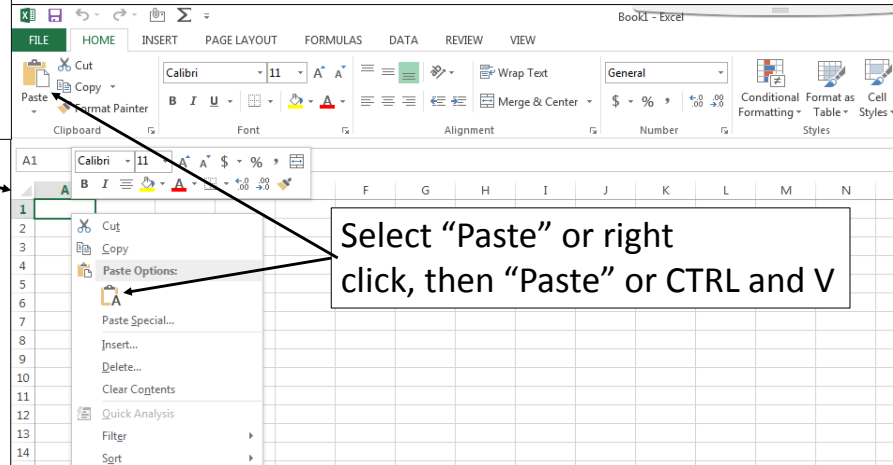
Open the scr\_export.txt file from ODDEX

- Select "Edit" then "Select All" or Press CTRL and A
- Once data is selected, go to "Edit" and "Copy" or Press CTRL and C



## Copy Data Into Excel

Open Excel, then  
place cursor into  
cell A1



Select "Paste" or right  
click, then "Paste" or CTRL and V

## Prepare the SCR Export Report

- Select Header Row and Wrap Text
- Freeze Top Row
- Justify column width
- Apply Filters

## Review SCR Conflict Data

Data on the report is separated by LEA1 and LEA2 the same as clicking on the Conflict Code and viewing the Conflict Details in SCR

- Students can have more than one line when they have multiple errors

	M	N	LEA1	P	Q	R	S	LEA2	T	U	V	W
	LEA1 Admitted From	LEA1 How Received	LEA1 Sent	Reason	LEA1 Educating or Resident	Reporting LEA2	Reporting LEA2 Name	LEA2 Date Range	LEA2 Percent Of Time	LEA2 Admission Date	LEA2 Admission Reason	
1	LEA1 Admitted From	Code	LEA1 How Received	Reason	LEA1 Educating or Resident	IRN	Reporting LEA2 Name	LEA2 Date Range	LEA2 Percent Of Time	LEA2 Admission Date	LEA2 Admission Reason	
2	LEA1 Admitted From	*	LEA1 How Received		LEA1 Educating or Resident	40404	Reporting LEA2 Name					
3	LEA1 Admitted From	*	LEA1 How Received		LEA1 Educating or Resident	50505	Reporting LEA2 Name					
4	LEA1 Admitted From	*	LEA1 How Received		LEA1 Educating or Resident	30303	Reporting LEA2 Name					
5	LEA1 Admitted From	C	LEA1 How Received		LEA1 Educating or Resident	60606	Reporting LEA2 Name					
6	LEA1 Admitted From	*	LEA1 How Received	OE	LEA1 Educating or Resident	40404	Reporting LEA2 Name					
7	LEA1 Admitted From	C	LEA1 How Received		LEA1 Educating or Resident	50505	Reporting LEA2 Name					



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## Quick Check

Exporting data from SCR in ODDEX and copying the data into Excel provides a quick way to sort and filter as the data is reviewed. Spreadsheets of data along with district notes added to the spreadsheet can be easily saved for future reference.

- Are you regularly submitting updated SCR data to EMIS?
- How often do you review SCR data in ODDEX?
- Are you using Excel as an additional tool to review SCR data?



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# Calendar and Student Data Comparison



## Calendar Data and Student Data

- Calendar Collections contain calendar data and no student data
- Student Collections contain student Building IRNs, State Equivalent Grade Levels, and Attendance Patterns
- The data does not meet until the FTE Reports are generated
- Using Excel, the data can be compared to ensure that calendar data and student data align

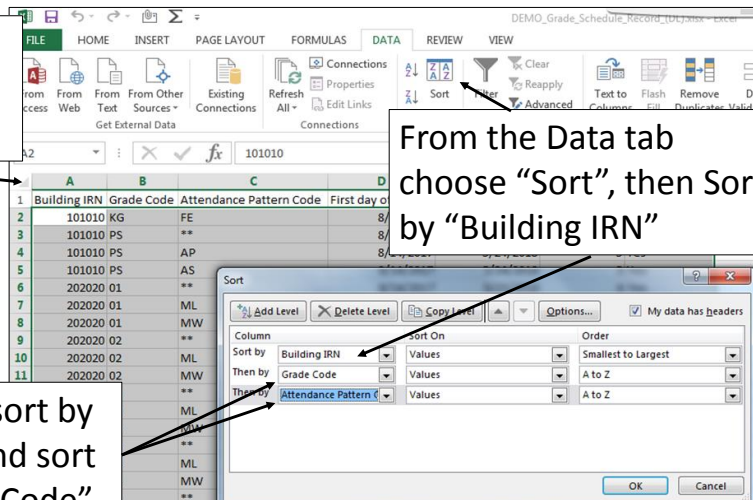


## Data Collector Files

- From the most recent Calendar Collection view the Submission/Preview Files
  - Open the Grade\_Schedule\_Record\_(DL) file
- From the most recent Student Collection
  - Open the Student\_Attributes\_Effective\_Date\_Record\_(FD) file
- Prepare both files for review

## Sort the DL File

Select the box in the upper left corner between the 1 and the A



From the Data tab choose "Sort", then Sort by "Building IRN"

Select "Add Level" and sort by "Grade Code", repeat and sort by "Attendance Pattern Code"

	A	B	C	D
	Building IRN	Grade Code	Attendance Pattern Code	First day of
2	101010	KG	FE	8/
3	101010	PS	**	8/
4	101010	PS	AP	8/
5	101010	PS	AS	8/
6	202020	01	**	
7	202020	01	ML	
8	202020	01	MW	
9	202020	02	**	
10	202020	02	ML	
11	202020	02	MW	
			**	
			ML	
			MW	
			**	

# Sort Error

A sort error occurs when a column has numeric values formatted as text and can be ignored

Leave as defaulted and click "OK"

Building IRN	Grade Code	Attendance Pattern Code	First day of school	Last day of school	Hours Per Day	Re
101010	KG	FE	8/14/2017	5/24/2018	6	Ye
101010	PS	**	8/14/2017			
101010	PS	AP	8/14/2017			
101010	PS	AS	8/14/2017	5/24/2018	5	Ye
202020	01	**	8/14/2017	5/25/2018	6	Ye
202020	01	ML				
202020	01	MW				
202020	02	**				
202020	02	ML				
202020	02	MW				
202020	03	**				
202020	03	ML				
202020	03	MW				
202020	04	**				
202020	04	ML	8/14/2017	5/25/2018	6	Ye



# Minimize DL File

Minimize the DL file once it is prepared and sorted

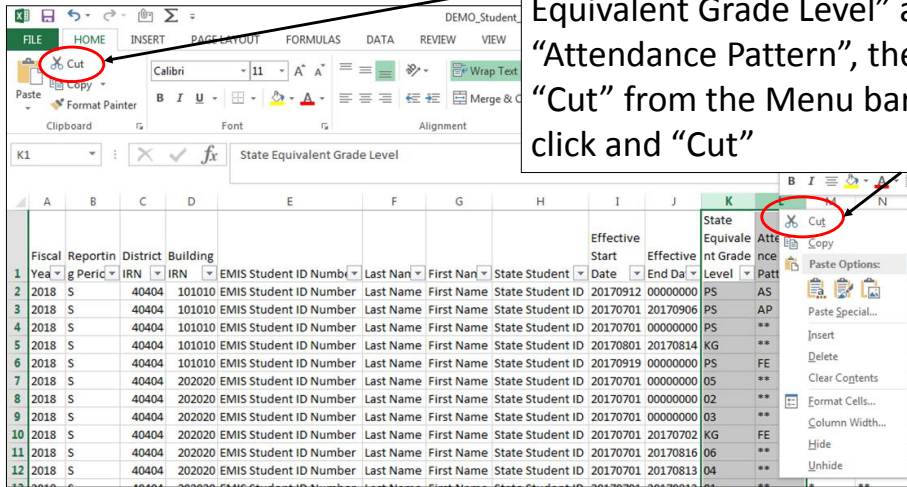
Building IRN	Grade Code	Attendance Pattern Code	First day of school	Last day of school	Hours Per Day	Record is Valid
101010	KG	FE	8/14/2017	5/24/2018	6	Yes
101010	PS	**	8/14/2017	5/24/2018	5	Yes
101010	PS	AP	8/14/2017	5/24/2018	5	Yes
101010	PS	AS	8/14/2017	5/24/2018	5	Yes
202020	01	**	8/14/2017	5/25/2018	6	Yes
202020	01	ML	8/14/2017	5/25/2018	6	Yes
202020	01	**	8/14/2017	5/25/2018	6	Yes
202020	02	**	8/14/2017	5/25/2018	6	Yes
202020	02	ML	8/14/2017	5/25/2018	6	Yes
202020	02	MW	8/14/2017	5/25/2018	6	Yes
202020	03	**	8/14/2017	5/25/2018	6	Yes
202020	03	ML	8/14/2017	5/25/2018	6	Yes
202020	03	MW	8/14/2017	5/25/2018	6	Yes
202020	04	**	8/14/2017	5/25/2018	6	Yes
202020	04	ML	8/14/2017	5/25/2018	6	Yes
202020	04	**	8/14/2017	5/25/2018	6	Yes
202020	04	MW	8/14/2017	5/25/2018	6	Yes
202020	04	**	8/14/2017	5/25/2018	6	Yes
202020	04	ML	8/14/2017	5/25/2018	6	Yes
202020	04	MW	8/14/2017	5/25/2018	6	Yes





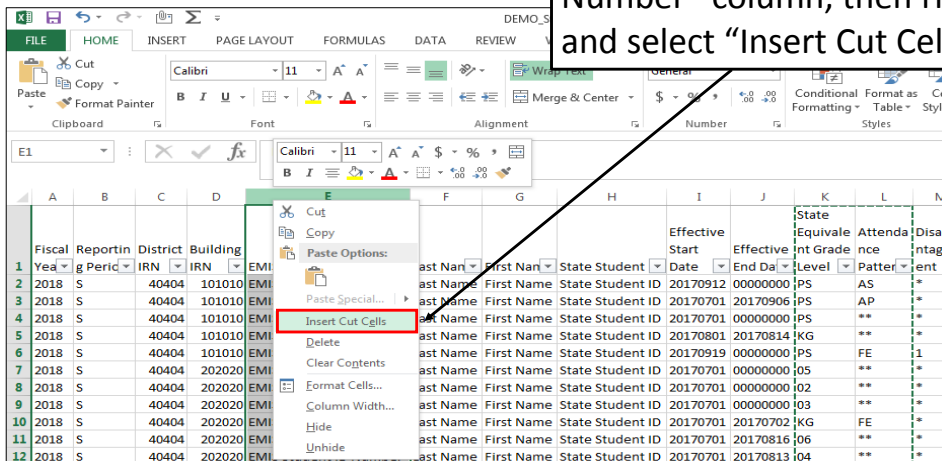
## FD File - Cut Columns

Select the columns for “State Equivalent Grade Level” and “Attendance Pattern”, then select “Cut” from the Menu bar or right click and “Cut”



## Insert Cut Cells

Select the “EMIS Student ID Number” column, then right click and select “Insert Cut Cells”



# Columns Side by Side

Columns are now in the same order as the DL file to easily compare the data

Fiscal Year	Reporting Period	District	Building IRN	Building	Equivalent Grade	Attendance Pattern	EMIS Student ID Number	Last Name	First Name	State Student ID	Effective Start Date	Effective End Date	Disadvantaged
2018	S	40404	101010	PS	AS	**	EMIS Student ID Number	Last Name	First Name	State Student ID	20170912	00000000	*
2018	S	40404	101010	PS	AP	**	EMIS Student ID Number	Last Name	First Name	State Student ID	20170701	20170906	*
2018	S	40404	101010	PS	**	**	EMIS Student ID Number	Last Name	First Name	State Student ID	20170701	00000000	*
2018	S	40404	101010	KG	**	**	EMIS Student ID Number	Last Name	First Name	State Student ID	20170801	20170814	*
2018	S	40404	101010	PS	FE	**	EMIS Student ID Number	Last Name	First Name	State Student ID	20170919	00000000	1
2018	S	40404	202020	05	**	**	EMIS Student ID Number	Last Name	First Name	State Student ID	20170701	00000000	*
2018	S	40404	202020	02	**	**	EMIS Student ID Number	Last Name	First Name	State Student ID	20170701	00000000	*
2018	S	40404	202020	03	**	**	EMIS Student ID Number	Last Name	First Name	State Student ID	20170701	00000000	*
2018	S	40404	202020	KG	FE	**	EMIS Student ID Number	Last Name	First Name	State Student ID	20170701	20170702	*
2018	S	40404	202020	06	**	**	EMIS Student ID Number	Last Name	First Name	State Student ID	20170701	20170816	*
2018	S	40404	202020	04	**	**	EMIS Student ID Number	Last Name	First Name	State Student ID	20170701	20170813	*

# Sort the FD File

Select the box in the upper left corner between the 1 and the A

From the Data tab choose "Sort", then Sort by "Building IRN"

Select "Add Level" and sort by "Grade Code", repeat and sort by "Attendance Pattern Code"

# Remove Duplicates in FD File

Select all data in the spreadsheet then from the Data Tab, select "Remove Duplicates"

In the Remove Duplicates Prompt, click on "Unselect All", then check the boxes next to "Building IRN", "State Equivalent Grade Level", and "Attendance Pattern" and click "OK"

Fiscal Year	Reporting Period	District IRN	Building IRN	Equivalent Grade Level	Attendance Pattern	EMIS Student ID Number	Last Name	First Name
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			
2018	S	40404	101010	PS	A			



# Duplicates Removed

Message will indicate how many duplicates were found and how many unique values remain, click "OK"

Fiscal Year	Reporting Period	District IRN	Building IRN	EMIS Student ID Number	Last Name	First Name	State Student ID	Effective Start Date	Effective End Date	Equivalent Grade Level	Attendance Pattern
2018	S	40404	101010	EMIS Stude	Last Name	First Name	State Studen	20170912	00000000	PS	AS
2018	S	40404	101010	EMIS Stude	Last Name	First Name	State Studen	20170912	00000000	PS	AS
2018	S	40404	101010	EMIS Stude	Last Name	First Name	State Studen	20170912	00000000	PS	AS
2018	S	40404	101010	EMIS Stude	Last Name	First Name	State Studen	20170912	00000000	PS	AS
2018	S	40404	101010	EMIS Stude	Last Name	First Name	State Studen	20170912	00000000	PS	AS
2018	S	40404	202020	EMIS Stude	Last Name	First Name	State Studen	20170912	00000000	PS	AS
2018	S	40404	202020	EMIS Stude	Last Name	First Name	State Studen	20170912	00000000	PS	AS
2018	S	40404	202020	EMIS Stude	Last Name	First Name	State Studen	20170912	00000000	PS	AS
2018	S	40404	202020	EMIS Stude	Last Name	First Name	State Studen	20170912	00000000	PS	AS
2018	S	40404	202020	EMIS Stude	Last Name	First Name	State Studen	20170912	00000000	PS	AS

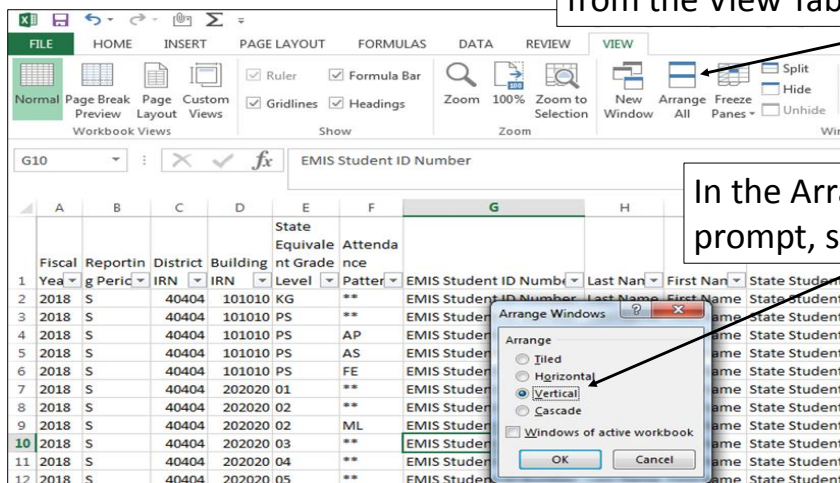


## Compare the Data

- The two spreadsheets have unduplicated instances of Building IRN, Grade Level and Attendance Pattern
- Compare the two spreadsheets to verify that all combinations in the FD file appear in the DL file
- When Grade Level contains asterisks \*\*, the asterisks should be treated as wildcards that can be matched against any grade level
- There could be DL records that are not represented in the FD file

## Arrange All

With both spreadsheets open, from the View Tab, select "Arrange All"



The screenshot shows the Microsoft Excel interface with the 'VIEW' tab selected. The 'Arrange All' button is highlighted in the 'VIEW' ribbon. A callout box points to this button with the text: "With both spreadsheets open, from the View Tab, select 'Arrange All'". Below the ribbon, the 'Arrange Windows' dialog box is open, showing the 'Vertical' option selected. A second callout box points to the 'Vertical' option with the text: "In the Arrange Windows prompt, select 'Vertical'".

Year	Reporting Period	District IRN	Building IRN	State Equivalent Grade	Attendance Pattern	EMIS Student ID Number	Last Name	First Name	State Student ID Number
2018	S	40404	101010	KG	**	EMIS Student			
2018	S	40404	101010	PS	**	EMIS Student			
2018	S	40404	101010	PS	AP	EMIS Student			
2018	S	40404	101010	PS	AS	EMIS Student			
2018	S	40404	101010	PS	FE	EMIS Student			
2018	S	40404	202020	01	**	EMIS Student			
2018	S	40404	202020	02	**	EMIS Student			
2018	S	40404	202020	02	ML	EMIS Student			
2018	S	40404	202020	03	**	EMIS Student			
2018	S	40404	202020	04	**	EMIS Student			
2018	S	40404	202020	05	**	EMIS Student			

## Apply Filters and Compare Data

Filter on one Building IRN at a time

Remember that \*\* for an Attendance Pattern is a specific Attendance Pattern while \*\* for Grade Level is a wildcard for any Grade Level

Compare the students on the left to the DL file on the right. Are all combinations appearing on both files?

Fiscal Year	Reporting Period	District IRN	Building IRN	Equivalent Grade	Attendance Pattern	EMIS Student ID Number	Last Name	First Name
2018	S	40404	101010	KG	**			
2018	S	40404	101010	PS	**			
2018	S	40404	101010	PS	AP			
2018	S	40404	101010	PS	AS			
2018	S	40404	101010	PS	FE			

Building IRN	Grade Level	Attendance Pattern	First Name
101010	KG	FE	8/1
101010	PS	**	8/1
101010	PS	AP	8/1
101010	PS	AS	8/1

### Quick Check

Since Calendar Data and Student Data don't meet until FTE Reports are generated, data integrity issues could exist without error. Cross check the data to identify issues between calendars and students.

- Are you comparing data from the most recent EMIS submissions?
- Do all student Building IRN, Grade Level, and Attendance Pattern combinations appear in the DL file?
- Should any unused calendars be set to not report to EMIS?

# Staff Data Formatting to Share with District Staff



## Sharing Staff Data

Staff EMIS data can come from a separate source system that is often managed by someone other than the EMIS Coordinator

- Sharing staff EMIS data can be a helpful when correcting and verifying the data
- Consider sharing
  - Level 1 Validations
  - Submission Files
  - Level 2 Reports
  - Staff and Course sections of the EMIS Manual





# EMIS Manual Sections

## 3.9 POSITION CODES

### NUMERICAL LISTING OF POSITION CODES *Official/Administrative Positions (1xx)*

Table 1. Official/Administrative Positions

Position Code	Description
101	<b>Administrative Assistant Assignment</b> An assignment to perform activities assisting an executive in the school district.
103	<b>Assistant, Deputy/Associate Superintendent Assignment</b> An assignment to a staff member (e.g., an assistant, deputy or associate superintendent or the assistant) to perform high-level, system-wide executive management functions in a school district.
104	<b>Assistant Principal Assignment</b> An assignment to a staff member (e.g., an assistant, deputy, or associate principal) to perform high-level executive management functions in an individual school, group of schools, or unit(s) of a school district.

Sections of the EMIS Manual could be helpful to staff as they verify data in an EMIS submission file such as the Staff Employment File (CK)



## Prepare the Data for Review

- Some EMIS data files and reports can be quite large
- Preparing the data before distribution could bring back better results from staff
- Consider doing some of the following:
  - Basic report preparations such as wrapping the text in the header row
  - Deleting unneeded columns
  - Sorting or Filtering
  - Separating data by building
  - Highlighting cells
  - Printing or emailing the data



# Staff and Course Level 1 Validations

**Initial Staff and Course Collection (FY18)**  
 FY18-L-Stf Crs Init: Collection required for all EMIS reporting entities. The beginning of year staff collection includes staff employed

**Submissions:** October 03, 2017 - January 31, 2018  
**Version:** 3  
**Status:** The collection was submitted December 11, 2017 at 04:17:19 PM by [ ]  
**Submission Status:** Processing Completed (December 11, 2017 at 04:17:00 PM)  
**Submission Number:** 4 (attempt 1)  
**Actions:** [Start Collection](#)  
[Add New Scheduled Collection](#)  
[Set Default Collection properties](#)

**From ODE:** [Level 2 Reports](#)

**Prepare Outputs:** [Level 1 Validations](#)  
[View submission 3 Data](#)

Select "Level 1 Validations"



# Level 1 Validations

**Initial Staff and Course Collection (FY18)**  
 Submission Number 4 (attempt 1), LEA: Franklin-Monroe Local

Validation exceptions are listed by record type and exception severity.  
 To generate the exception report for one record type and/or exception severity, click on the link in the corresponding row and column.

**Last Prepared:** December 11, 2017 (17 days ago) at 04:15:17 PM

Record Type	Fatal	Critical	Warning	Info	Total LV1Er	Depnd Invalid	Valid Recs
Career-Technical Education Correlated Class Record (CV)	0	0	0	0	0	0	0
Contract Only Staff Record (CC)	0	0	0	0	0	0	0
Contractor Staff Employment Record (CJ)	0	0	0	0	0	0	0
Course Master Record (CN)	0	0	0	0	0	0	0
Mapped Classroom Code Record (CM)	0	0	0	0	0	0	0
<a href="#">Staff Course Record (CU)</a>	30	0	0	0	30	0	0
<a href="#">Staff Demographic Record (CI)</a>	4	0	8	0	12	0	0
<a href="#">Staff Employment Record (CK)</a>	13	0	0	0	13	0	0
<a href="#">Staff Missing Override Record (CP)</a>	0	0	0	0	0	0	0
<a href="#">Staff Summer Employment Separation Record (CL)</a>	0	0	0	0	0	0	0
<a href="#">Student Course Record (GN)</a>	0	0	0	0	0	0	0
<b>Total Counts:</b>	47	0	8	0	55	0	0

[Generate Full Validation Report](#)

Click on the link below to download the zip file.  
**Report(s)**  
[AllRTs046649-2018L1STRV2-sub4-1AllSevs2017-12-28\\_08-12-31.csv](#)

**Output Type**  
 The validation exception report can be viewed as an HTML pop-up or downloaded as a CSV file(s). CSV file(s) will download as a single .zip file.  
 HTML  CSV

**CSV Output Options**  
 You can create a separate CSV file for each Record Type by checking the box below:  
 Record Type

Select Output Type "CSV" and uncheck the CSV Output Option for "Record Type"

Select "Generate Full Validation Report" and then open the report







## Review Files cont'd

File	Submission 5			Sub 4
	Valid	Invalid	Total	Valid
<a href="#">Career-Technical Education Correlated Class Record (CV).csv</a>				
<a href="#">Contract Only Staff Record (CC).csv</a>				
<a href="#">Contractor Staff Employment Record (C).csv</a>	0	0	0	0
<a href="#">Course Master Record (CN).csv</a>	373	0	373	365
<a href="#">Excluded Records.csv</a>			5	
<a href="#">Mapped Classroom Code Record (CM).csv</a>	0	0	0	0
<a href="#">Staff Course Record (CU).csv</a>	367	6	373	363
<a href="#">Staff Demographic Record (CI).csv</a>	109	0	109	106
<a href="#">Staff Employment Record (CK).csv</a>	158	0	158	153
<a href="#">Staff Missing Override Record (CP).csv</a>	0	0	0	0
<a href="#">Staff Missing Report.csv</a>			0	
<a href="#">Staff Summer Employment Separation Record (CL).csv</a>	0	0	0	0
<a href="#">Student Course Record (GN).csv</a>	5200	0	5200	5148
<b>Total counts:</b>	6207	6	6218	

Open the Staff Demographic Record (CI) file

## Sharing Data for Review

- Prepare the file for review
- Add grid lines
- Print titles at top of each page
- Add a header
- Select page setup options
- View print preview

# Prepare the Staff Demographic File (CI)

Demographic file contains one line per staff member

- Prepare your spreadsheet to be user friendly

Fiscal Year	Reporting Period	District IRN	Employee ID	Prefix Name	First Name	Middle Name	Last Name	Suffix Name	State ID	Staff Birth Date	Racial/Ethnic Group	Gender	Education Level	Semester Hours	Early Childhood Education Qualification	Authorized Teaching Experience	Total Years in Education	Principal Experience	Record is Valid
2018	L	40404	WR2009109	JAMES	P.	ADAMS			WR2009109	19630601	W	M	3	193	*	25	30	5	Yes
2018	L	40404	MH2595515	MORGAN	M.	AUBURN		MH2										0	Yes
2018	L	40404	ZD1202007	JERALD	D.	BARGEN		ZD1										0	Yes
2018	L	40404	MH2529121	LISA	R.	BECHEL		MH2										0	Yes
2018	L	40404	ZD1202227	STUART	D.	BEIST		ZD1										0	Yes
2018	L	40404	IN2025999	JODI	F.	BENNER		IN20										0	Yes
2018	L	40404	ZD1202272	DEBORAH	A.	BENSMORE		ZD1										0	Yes
2018	L	40404	MH1227755	JESSICA		BENNY		MH1227755	19860927	W	F	2	173	*	3	3	0	Yes	
2018	L	40404	ZD1202252	JIMES	L	BOLEN		ZD1202252	19500910	W	M	0	0	*	0	0	0	Yes	
2018	L	40404	MH2125722	CAREN	A	BRODRECK		MH2125722	19710518	W	F	3	169	*	15	15	0	Yes	
2018	L	40404	ZD1202270	REGINA	M	BROWN		ZD1202270	19701017	W	F	0	0	*	0	0	0	Yes	
2018	L	40404	MH1250971	AMY	L	FISHER		MH1250971	19700902	W	F	2	136	*	14	14	0	Yes	
2018	L	40404	MH2597599	ASHLEE	M.	FURMAN		MH2597599	19840718	W	F	3	161	*	12	12	1	Yes	
2018	L	40404	ZD1202252	ROBIN	E	FRALEY		ZD1202252	19470814	W	M	0	0	*	0	0	0	Yes	
2018	L	40404	ZD1202275	SANDRA	S	GOLF		ZD1202275	19570116	W	F	0	0	*	0	0	0	Yes	
2018	L	40404	IN2022290	TINA	J	GREEN		IN2022290	19640728	W	F	3	209	*	10	22	0	Yes	

Header data is wrapped, top row is frozen, all data is viewable



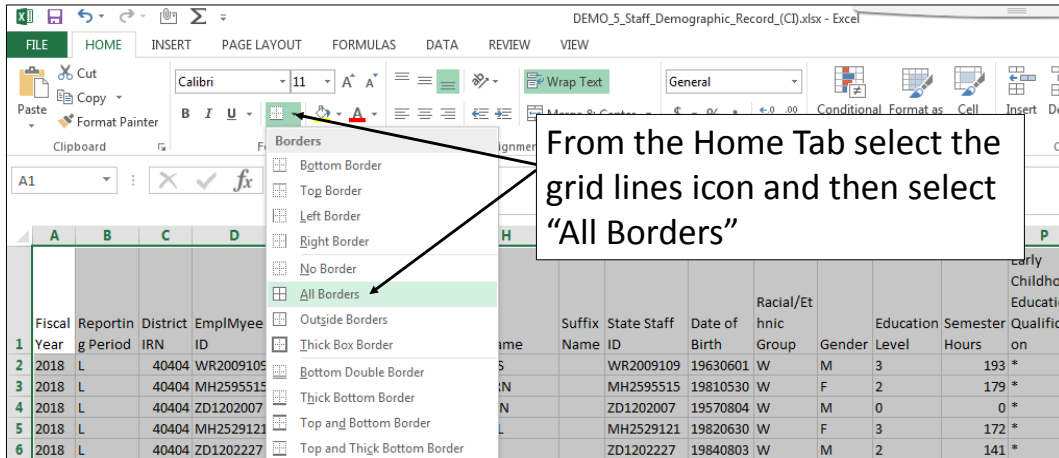
# Select Cells with Data

Fiscal Year	Reporting Period	District IRN	Employee ID	Prefix Name	First Name	Middle Name	Last Name	Suffix Name	State ID	Staff Birth Date	Racial/Ethnic Group	Gender	Education Level	Semester Hours	Early Childhood Education Qualification	Authorized Teaching Experience	Total Years in Education	Principal Experience	Record is Valid
2018	L	40404	WR2009109	JAMES	P.	ADAMS			WR2009109	19630601	W	M	3	193	*	25	30	5	Yes
2018	L	40404	MH2595515	MORGAN	M.	AUBURN		MH2										0	Yes
2018	L	40404	ZD1202007	JERALD	D.	BARGEN		ZD1										0	Yes
2018	L	40404	MH2529121	LISA	R.	BECHEL		MH2										0	Yes
2018	L	40404	ZD1202227	STUART	D.	BEIST		ZD1										0	Yes
2018	L	40404	IN2025999	JODI	F.	BENNER		IN20										0	Yes
2018	L	40404	ZD1202272	DEBORAH	A.	BENSMORE		ZD1										0	Yes
2018	L	40404	MH1227755	JESSICA		BENNY		MH1227755	19860927	W	F	2	173	*	3	3	0	Yes	
2018	L	40404	ZD1202252	JIMES	L	BOLEN		ZD1202252	19500910	W	M	0	0	*	0	0	0	Yes	
2018	L	40404	MH2125722	CAREN	A	BRODRECK		MH2125722	19710518	W	F	3	169	*	15	15	0	Yes	
2018	L	40404	ZD1202270	REGINA	M	BROWN		ZD1202270	19701017	W	F	0	0	*	0	0	0	Yes	
2018	L	40404	MH1250971	AMY	L	FISHER		MH1250971	19700902	W	F	2	136	*	14	14	0	Yes	
2018	L	40404	MH2597599	ASHLEE	M.	FURMAN		MH2597599	19840718	W	F	3	161	*	12	12	1	Yes	
2018	L	40404	ZD1202252	ROBIN	E	FRALEY		ZD1202252	19470814	W	M	0	0	*	0	0	0	Yes	
2018	L	40404	ZD1202275	SANDRA	S	GOLF		ZD1202275	19570116	W	F	0	0	*	0	0	0	Yes	
2018	L	40404	IN2022290	TINA	J	GREEN		IN2022290	19640728	W	F	3	209	*	10	22	0	Yes	
2018	L	40404	MH1259722	ERIC	O.	GRILLER		MH1259722	19880906	W	M	2	177	*	5	5	0	Yes	

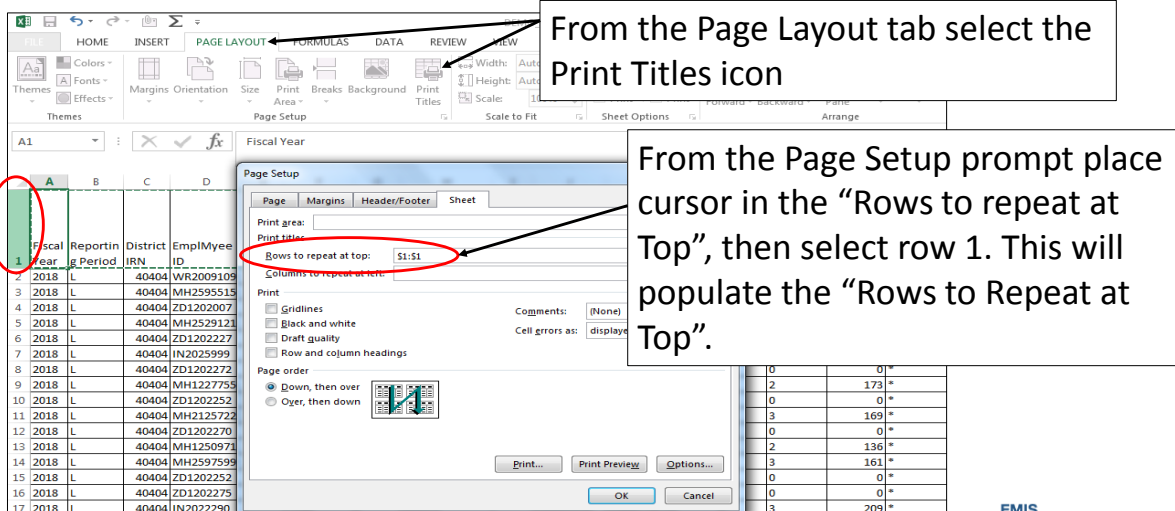
Select Cell A1 and then hold CTRL and Shift keys down and then Right Arrow and the Down Arrow. This will select the rows and columns on your spreadsheet that contain data.



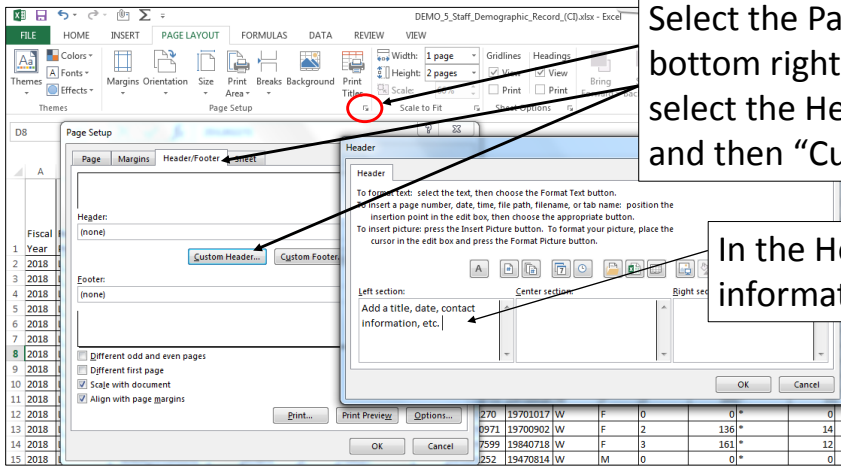
# Add Grid Lines



# Print Titles at Top of Each Page



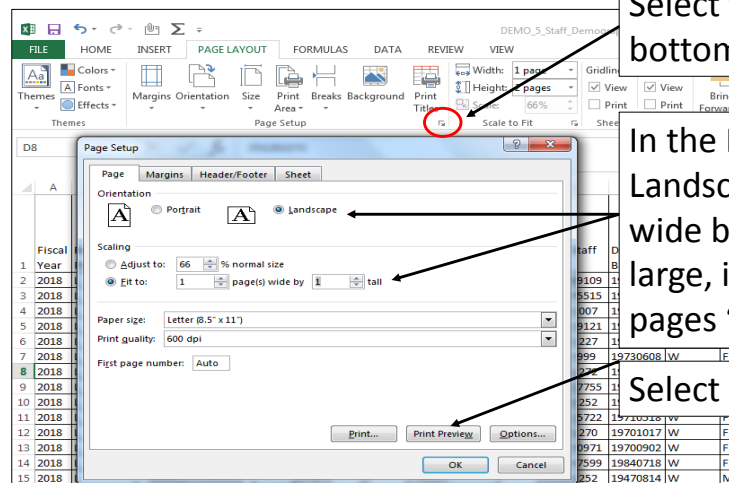
# Add Header



Select the Page Layout tab bottom right corner icon, select the Header/Footer tab and then "Custom Header"

In the Header prompt, enter information and click "OK"

# Page Setup



Select the Page Layout tab bottom right corner icon

In the Page Setup Prompt, select Landscape and "Fit To" 1 page(s) wide by 1 tall. If your report is large, increase the number of pages "tall" to print.

Select "Print Preview"



# FTE Detail Report Subtotaling



## FTE Detail Report Subtotaling

### Subtotal the FTE Detail Report

- Sort by SSID, then by Enrollment Start Date

From the Data Tab choose Sort

Sort by SSID, then select "Add Level", then sort by "ENRL START DATE", then select "OK"

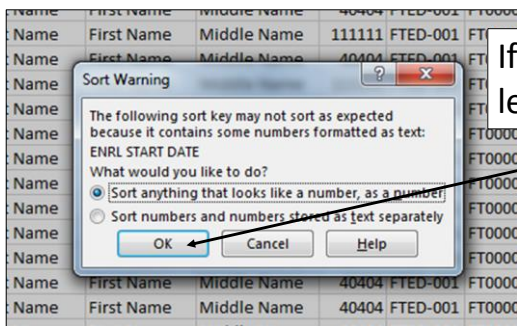
RPT DEST	SEVERITY	SSID	Emis ID	Last Name	First Name	Middle Name	SSA IRM CODE	LEVEL	REG TY
40404	101010 F	AF3330185	EMIS ID	Last Name	First Name	Middle Name	40404 FTED-0		
40404	101010 F	AF9794373	EMIS ID	Last Name	First Name	Middle Name	40404 FTED-0		
40404	101010 I	AF9794373							
40404	101010 C	AF9794373							
40404	101010 I	AG3444498							
40404	101010 I	IS7050894							
40404	101010 I	IS7050894							
40404	101010 I	IS7998181							
40404	101010 I	KJ3857778							
40404	101010 I	KJ9471903							
40404	101010 I	KJ9471903							
40404	101010 I	KL6339882							
40404	101010 I	KL6339882							
40404	101010 I	KL8833970							
40404	101010 I	KL8833970							
40404	101010 I	KL9685822							





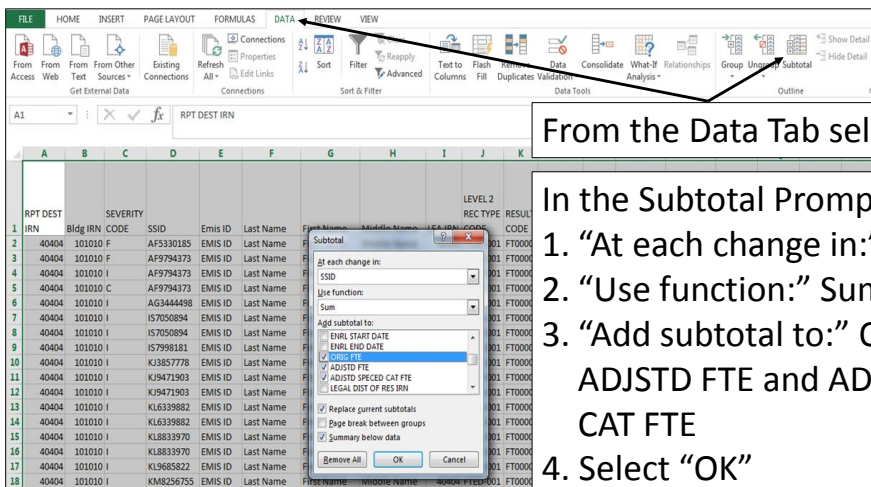
# Sort Warning

This Sort Warning is generated because the ENRL START DATE column contains some numbers that are formatted as text



If a Sort Warning is generated, leave as defaulted and select "OK"

# Apply Subtotals



From the Data Tab select Subtotal

- In the Subtotal Prompt select
1. "At each change in:" SSID
  2. "Use function:" Sum
  3. "Add subtotal to:" ORIG FTE and ADJSTD FTE and ADJSTD SPECED CAT FTE
  4. Select "OK"



# FTE Detail Report Subtotaled

This student's Original FTE, Adjusted FTE, and Special Education FTE, have been subtotaled and appear in chronological order

IRN	Bldg	IRN	CODE	SSID	Emis ID	Last Name	First Name	Middle Name	LEA	IRN	CODE	CODE	DESCR	CODE	DATE	DATE	ORIG FTE	FTE	CAT FTE	LEGAL DI
40404	101010	F		AF5330185	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	NFRG		08/01/2017	12/31/2500	1	0		222222
<b>AF5330185 Total</b>																				
40404	101010	F		AF9794373	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	NFRG		07/01/2017	12/11/2017	0.376623	0		40404
40404	101010	I		AF9794373	EMIS ID	Last Name	First Name	Middle Name	111111	FTED-001	FT0000	FTE Detail	PSET		12/12/2017	12/31/2500	0.612676	0.612676	0.612676	444444
40404	101010	C		AF9794373	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	PSRD		12/12/2017	12/31/2500	0.623377	0.387324	0.387324	40404
<b>AF9794373 Total</b>																				
40404	101010	I		AG3444498	EMIS ID	Last Name	First Name	Middle Name	111111	FTED-001	FT0000	FTE Detail	SPCO		07/01/2017	12/31/2500	1	1	1	444444
<b>AG3444498 Total</b>																				
40404	101010	I		IS7050894	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	OPDD		07/01/2017	09/03/2017	0.020547	0.020547		333333
40404	101010	I		IS7050894	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	OPDD		09/04/2017	12/31/2500	0.979453	0.979453		333333
<b>IS7050894 Total</b>																				
40404	101010	I		IS7998181	EMIS ID	Last Name	First Name	Middle Name	111111	FTED-001	FT0000	FTE Detail	COMM		10/17/2017	12/31/2500	0.782609	0.782609		444444
<b>IS7998181 Total</b>																				
40404	101010	I		KJ3857778	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	OPDD		07/01/2017	12/31/2500	1	1		333333



# Undo Subtotals

To undo subtotals select "Subtotal" and then "Remove All"

RPT DEST	SEVERITY	IRN	Bldg	IRN	CODE	SSID	Emis ID	Last Name	First Name	Middle Name	LEA	IRN	CODE	CODE	DESCR	CODE	DATE	DATE	ORIG FTE	FTE	CAT FTE	LEGAL DI
40404		101010	F			AF5330185	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	NFRG		08/01/2017	12/31/2500	1	0		222222
<b>AF5330185 Total</b>																						
40404		101010	F			AF9794373	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	NFRG		07/01/2017	12/11/2017	0.376623	0		40404
40404		101010	I			AF9794373	EMIS ID	Last Name	First Name	Middle Name	111111	FTED-001	FT0000	FTE Detail	PSET		12/12/2017	12/31/2500	0.612676	0.61		444444
40404		101010	C			AF9794373	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	PSRD		12/12/2017	12/31/2500	0.623377	0.38		40404
<b>AF9794373 Total</b>																						
40404		101010	I			AG3444498	EMIS ID	Last Name	First Name	Middle Name	111111	FTED-001	FT0000	FTE Detail	SPCO		07/01/2017	12/31/2500	1	1		444444
<b>AG3444498 Total</b>																						
40404		101010	I			IS7050894	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	OPDD		07/01/2017	09/03/2017	0.020547	0.02		333333
40404		101010	I			IS7050894	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	OPDD		09/04/2017	12/31/2500	0.979453	0.97		333333
<b>IS7050894 Total</b>																						
40404		101010	I			IS7998181	EMIS ID	Last Name	First Name	Middle Name	111111	FTED-001	FT0000	FTE Detail	COMM		10/17/2017	12/31/2500	0.782609	0.78		444444
<b>IS7998181 Total</b>																						
40404		101010	I			KJ3857778	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	OPDD		07/01/2017	12/31/2500	1	1		333333
40404		101010	I			KJ9471903	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	RGJV		07/01/2017	09/03/2017	0.020547	0.02		333333
40404		101010	I			KJ9471903	EMIS ID	Last Name	First Name	Middle Name	40404	FTED-001	FT0000	FTE Detail	RGJV		09/04/2017	12/31/2500	0.979453	0.97		333333



## Quick Check

Subtotaling the FTE Detail Report provides a format for easier analysis of the data. Since many students have multiple FTEs calculated, using Excel to sum by student will allow the detail to be available while providing subtotals below each student.

- Are there students with Adjusted or Special Education FTEs that are less than the Original FTE?
- Are you using this report with your FTE Adjustment report to identify reasons for the adjustments?
- Are you saving your reports between reviews?



## FTE Detail Report PivotTable



# FTE Detail Report PivotTable

Create a PivotTable in an FTE Detail Report

From the Insert Tab, select "PivotTable"

On the Create PivotTable Prompt, select "OK"



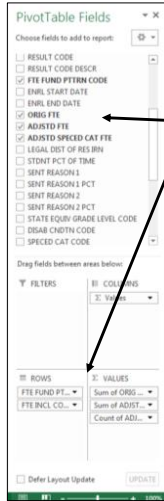
# PivotTable Fields

PivotTable Fields are available to select to set up the PivotTable

When inserting a PivotTable, a new tab is opened



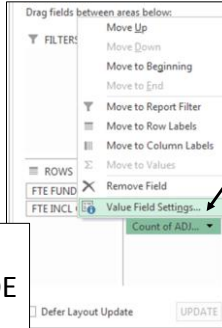
# Select PivotTable Fields



Click and Drag fields into the PivotTable areas below

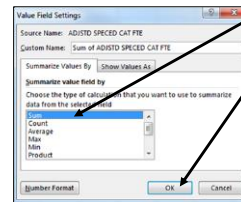
For Rows select:  
FTE FUND PTRN CODE  
FTE INCL CODE

For Values select:  
ORIG FTE  
ADJSTD FTE  
ADJSTD SPECED CAT FTE



Select the "Count" of ADJSTD SPECED CAT FTE, then in the menu select "Value Field Settings"

In the Value Field Settings prompt, select "Sum" and "OK"



# PivotTable

Row Labels	Sum of ORIG FTE	Sum of ADJSTD FTE	Sum of ADJSTD SPECED CAT FTE
COMM	1.901528	1.901528	
NFRG	9.714285	0	
NONE	9.714285	0	
OPDD	19.502042	19.502042	
FULL	3.558118	3.558118	
NONE	15.943924	15.943924	
OPID	1	1	
PART	1	1	
PSET	0.612676	0.612676	0.612676
FULL	0.612676	0.612676	0.612676
PSRD	0.623377	0.387324	0.387324
FULL	0.623377	0.387324	0.387324
RGJV	48.343595	48.325029	3
FULL	42.343595	42.325029	3
PART	6	6	
SPCO	1	1	1
FULL	1	1	1
<b>Grand Total</b>	<b>82.697503</b>	<b>72.728599</b>	<b>7</b>

Click on specific values to drill into the detailed data

When drilling on a number within the PivotTable, all of the data within the row will appear



## Detailed Data

Detailed data will appear in a new tab

When finished, the new tab can be deleted or just go back to the PivotTable on Sheet1 to drill again

EMPLOYEE ID	LAST NAME	FIRST NAME	MIDDLE NAME	SSN	PROJECT CODE	REQUEST CODE	REQUEST CODE DESCRIPTION	FTE FUNDING CODE	FTE FUNDING CODE DESCRIPTION	FTE START DATE	FTE END DATE	FTE FTE	ASSIGNED FTE	ASSIGNED SPECIES	
40404	385850 F	AF383018	EMIS ID	Last Name	First Name	Middle Name	40404	FTEED-001	F70000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385850 F	VQ589751	EMIS ID	Last Name	First Name	Middle Name	40404	FTEED-001	F70000	FTE Detail	NFRG	08/29/2017	12/31/2500	1	0
40404	385850 F	VQ184648	EMIS ID	Last Name	First Name	Middle Name	40404	FTEED-001	F70000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385850 F	AF979427	EMIS ID	Last Name	First Name	Middle Name	40404	FTEED-001	F70000	FTE Detail	NFRG	07/01/2017	12/31/2017	0.939623	0
40404	385850 F	VQ587639	EMIS ID	Last Name	First Name	Middle Name	40404	FTEED-001	F70000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385850 F	NK313773	EMIS ID	Last Name	First Name	Middle Name	40404	FTEED-001	F70000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385850 F	NP935993	EMIS ID	Last Name	First Name	Middle Name	40404	FTEED-001	F70000	FTE Detail	NFRG	07/01/2017	12/31/2500	1	0
40404	385850 F	NQ379662	EMIS ID	Last Name	First Name	Middle Name	40404	FTEED-001	F70000	FTE Detail	NFRG	08/01/2017	12/31/2017	0.937662	0
40404	385850 F	LK400923	EMIS ID	Last Name	First Name	Middle Name	40404	FTEED-001	F70000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385850 F	K3601326	EMIS ID	Last Name	First Name	Middle Name	40404	FTEED-001	F70000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385850 F	KP266321	EMIS ID	Last Name	First Name	Middle Name	40404	FTEED-001	F70000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0

## Quick Check

PivotTables can provide a summary of a large amount of data that allows the data to be analyzed in smaller sections. Try using Recommended PivotTables to think of different ways to analyze your data.

- Are you able to create a PivotTable and drill into the detailed data?
- What other fields in the FTE Report could be brought into a PivotTable?
- Can you think of other reports that could be analyzed using PivotTables?

## Summary

- Basic Excel techniques can be very useful when troubleshooting
  - EMIS data in the Student Information System
  - EMIS reports
  - preview/review files
- These techniques should be part of your everyday practices



## Resources

- Microsoft Excel Help within Excel “?” Articles and Videos
- Google it
- Microsoft Excel Classes
- Your ITC



# Questions?

