

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

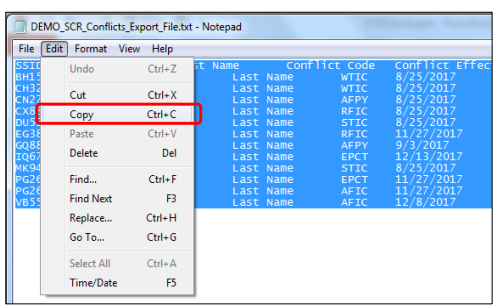
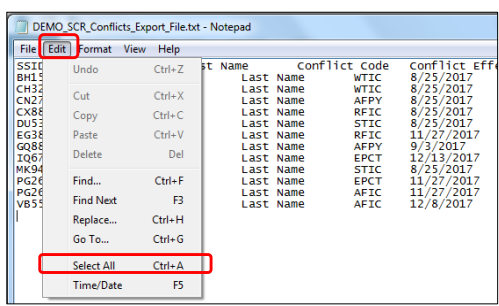
SSID	Last Name	First Name	Birth Date	Conflict Code	Relationships
				AFPY	
				AFPY	



SCR Text File

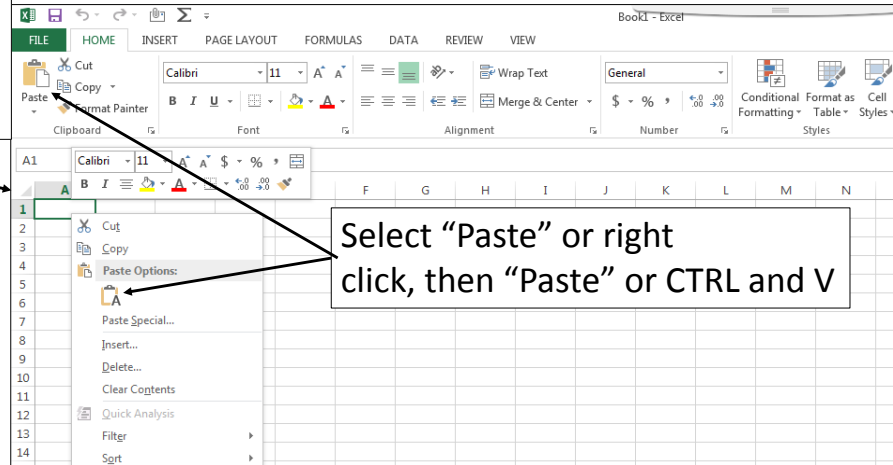
Open the scr_export.txt file from ODDEX

- 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



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					



9

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?



10

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

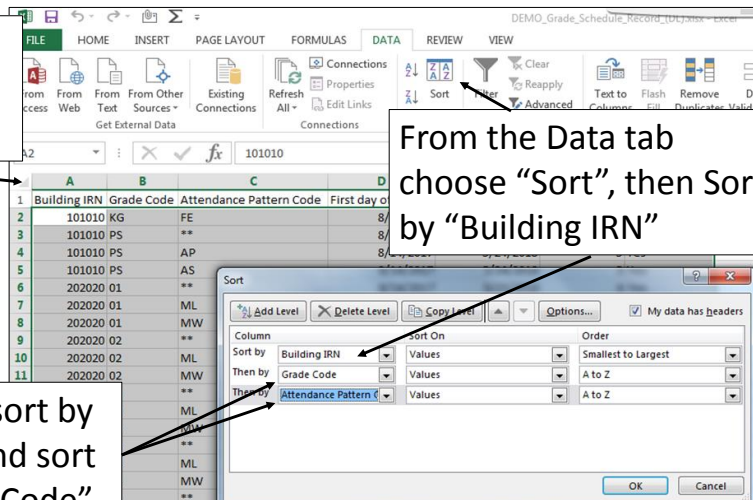


Data Collector Files

- 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"

1	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	

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"

1	Building IRN	Grade Code	Attendance Pattern Code	First day of school	Last day of school	Hours Per Day	Re
2	101010	KG	FE	8/14/2017	5/24/2018	6	Ye
3	101010	PS	**	8/14/2017			
4	101010	PS	AP	8/14/2017			
5	101010	PS	AS	8/14/2017	5/24/2018	5	Ye
6	202020	01	**	8/14/2017	5/25/2018	6	Ye
7	202020	01	ML				
8	202020	01	MW				
9	202020	02	**				
10	202020	02	ML				
11	202020	02	MW				
12	202020	03	**				
13	202020	03	ML				
14	202020	03	MW				
15	202020	04	**				
16	202020	04	ML	8/14/2017	5/25/2018	6	Ye



Minimize DL File

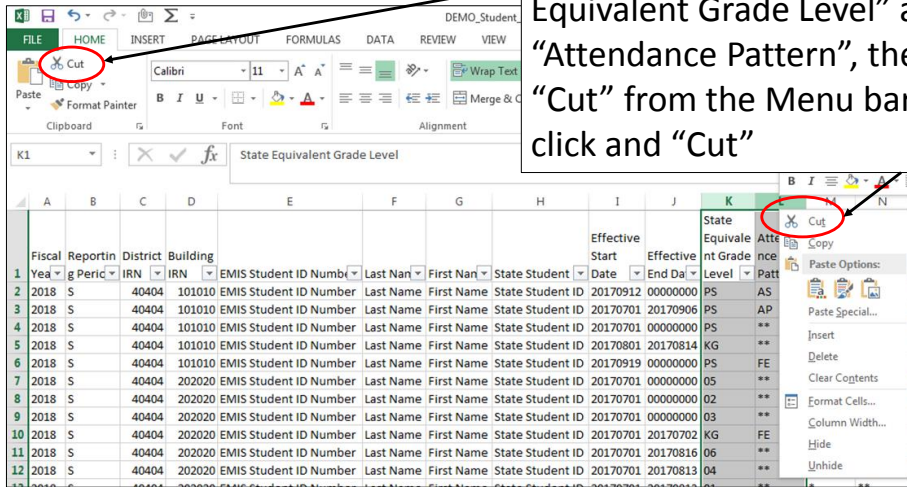
Minimize the DL file once it is prepared and sorted

1	Building IRN	Grade Code	Attendance Pattern Code	First day of school	Last day of school	Hours Per Day	Record is valid
2	101010	KG	FE	8/14/2017	5/24/2018	6	Yes
3	101010	PS	**	8/14/2017	5/24/2018	6	Yes
4	101010	PS	AP	8/14/2017	5/24/2018	5	Yes
5	101010	PS	AS	8/14/2017	5/24/2018	5	Yes
6	202020	01	**	8/14/2017	5/25/2018	6	Yes
7	202020	01	ML	8/14/2017	5/25/2018	6	Yes
8	202020	01	MW	8/14/2017	5/25/2018	6	Yes
9	202020	02	**	8/14/2017	5/25/2018	6	Yes
10	202020	02	ML	8/14/2017	5/25/2018	6	Yes
11	202020	02	MW	8/14/2017	5/25/2018	6	Yes
12	202020	03	**	8/14/2017	5/25/2018	6	Yes
13	202020	03	ML	8/14/2017	5/25/2018	6	Yes
14	202020	03	MW	8/14/2017	5/25/2018	6	Yes
15	202020	04	**	8/14/2017	5/25/2018	6	Yes
16	202020	04	ML	8/14/2017	5/25/2018	6	Yes
17	202020	04	MW	8/14/2017	5/25/2018	6	Yes
18	202020	05	**	8/14/2017	5/25/2018	6	Yes
19	202020	05	ML	8/14/2017	5/25/2018	6	Yes
20	202020	05	MW	8/14/2017	5/25/2018	6	Yes
21	202020	06	**	8/14/2017	5/25/2018	6	Yes
22	202020	06	ML	8/14/2017	5/25/2018	6	Yes
23	202020	06	MW	8/14/2017	5/25/2018	6	Yes
24	202020	06	FE	8/14/2017	5/25/2018	6	Yes
25	202020	06	ML	8/14/2017	5/25/2018	6	Yes
26	202020	06	MW	8/14/2017	5/25/2018	6	Yes
27	202020	01	**	8/14/2017	5/25/2018	6	Yes
28	202020	01	ML	8/14/2017	5/25/2018	6	Yes
29	202020	01	MW	8/14/2017	5/25/2018	6	Yes
30	202020	02	**	8/14/2017	5/25/2018	6	Yes
31	202020	02	ML	8/14/2017	5/25/2018	6	Yes
32	202020	02	MW	8/14/2017	5/25/2018	6	Yes
33	202020	03	**	8/14/2017	5/25/2018	6	Yes
34	202020	03	ML	8/14/2017	5/25/2018	6	Yes
35	202020	03	MW	8/14/2017	5/25/2018	6	Yes
36	202020	04	**	8/14/2017	5/25/2018	6	Yes
37	202020	04	ML	8/14/2017	5/25/2018	6	Yes
38	202020	04	MW	8/14/2017	5/25/2018	6	Yes



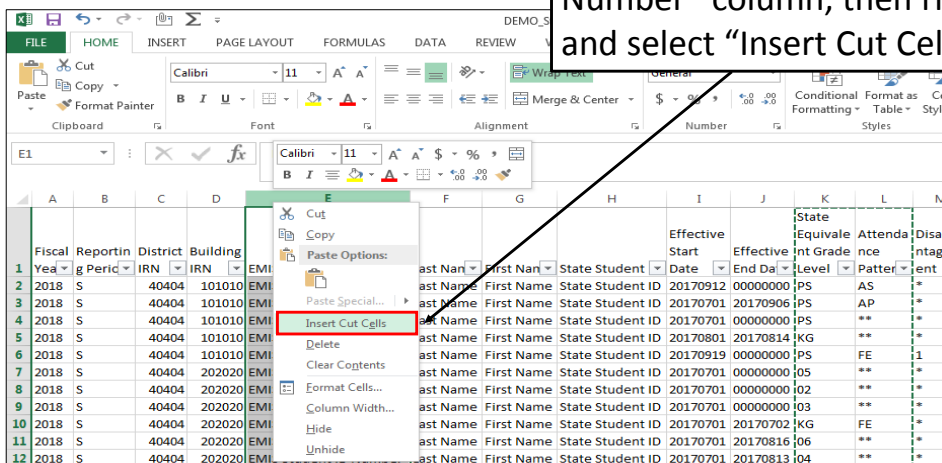
FD File - Cut Columns

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	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

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

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"



Duplicates Removed

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

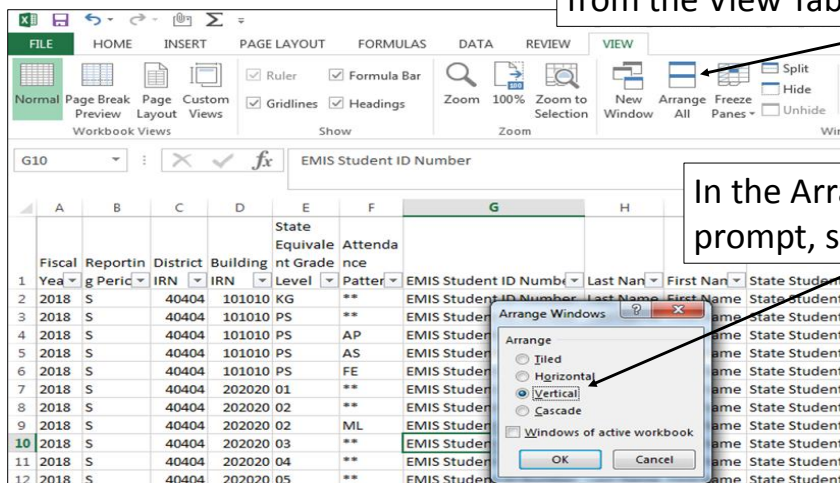


Compare the Data

- 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"



Arrange Windows

Arrange

Tiled

Horizontal

Vertical

Cascade

Windows of active workbook

OK Cancel

Year	Reporting Period	District IRN	Building IRN	State Equivalent Grade	Attendance Pattern	EMIS Student ID Number	Last Name	First Name	State Student
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			

In the Arrange Windows prompt, select "Vertical"

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	Building IRN	State	Equivalent Grade	Attendance Pattern
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
101010	KG	FE
101010	PS	**
101010	PS	AP
101010	PS	AS

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	Administrative Assistant Assignment An assignment to perform activities assisting an executive in the school district.
103	Assistant, Deputy/Associate Superintendent Assignment 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	Assistant Principal Assignment 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 record type 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
Staff Course Record (CU)	30	0	0	0	30	0	0
Staff Demographic Record (CI)	4	0	8	0	12	0	0
Staff Employment Record (CK)	13	0	0	0	13	0	0
Staff Missing Override Record (CP)	0	0	0	0	0	0	0
Staff Summer Employment Separation Record (CL)	0	0	0	0	0	0	0
Student Course Record (GN)	0	0	0	0	0	0	0
Total Counts:	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



Level 1 Validations ,cont'd

Error Number	Error Level	Message	Description	Employee ID	Employee Name	State Staff ID	Local Classroom Code	Position Code	Local Contract Code
2	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
3	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
4	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
5	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
6	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
7	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
8	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
9	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
10	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
11	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
12	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
13	CU.0007	Fatal	Element value cannot be blank	(CU100)	Missing value for Highly Qualified Teacher				
14	CU						AAHS-445UR-01		
15	CU						AAHS-240UR-01		
16	CU						AAHS-300J7-01		
							AAHS-300J7-02		

Using Excel can make working through Level 1 Validations easier since records can be quickly sorted or filtered

Before sending this to district staff for review, consider sorting by Employee Name or adding additional explanations to aid in identifying the issue



Submission Files

Staff and Course Collection Submission Files/Review Data

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

Submissions: October 03, 2017 - January 31, 2018
 Version: 3
 Status: The collection was submitted December 12, 2017 at 01:55:28 PM by Walters.
 Submission Status: Processing Completed (December 12, 2017 at 01:55:03 PM)
 Submission Number: 5 (attempt 1)
 Actions: [Start Collection](#), [Add New Scheduled Collection](#), [Set Default Collection properties](#)

Prepare Outputs: [Level 1 Submissions](#), [View submission 4 Data](#)

Initial Staff and Course Collection (FY18)
 Submission Number 5 (attempt 1), LEA: Ansonia Local

Use the Generate Review Data link to review the data previously submitted.
 Last Prepared: December 12, 2017 (15 days ago) at 01:20:38 PM

Review Types:
 Detail
 Missing Data

Output Options:
 Zip File: Download file as a compressed .zip (for faster downloads)
 File Format: HTML, CSV
 Include in CSV files: Data only, Data and Fatal exceptions, Data and All exceptions

[Generate Review Data](#)

Select "View Submission Data"

Select "Generate Review Data"



Review Files cont'd

File	Submission 5			Sub 4
	Valid	Invalid	Total	Valid
Career-Technical Education Correlated Class Record (CV).csv				
Contract Only Staff Record (CC).csv				
Contractor Staff Employment Record (C).csv	0	0	0	0
Course Master Record (CN).csv	373	0	373	365
Excluded Records.csv			5	
Mapped Classroom Code Record (CM).csv	0	0	0	0
Staff Course Record (CU).csv	367	6	373	363
Staff Demographic Record (CI).csv	109	0	109	106
Staff Employment Record (CK).csv	158	0	158	153
Staff Missing Override Record (CP).csv	0	0	0	0
Staff Missing Report.csv			0	
Staff Summer Employment Separation Record (CL).csv	0	0	0	0
Student Course Record (GN).csv	5200	0	5200	5148
Total counts:	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		MH2595515											0	Yes
2018	L	40404	ZD1202007		JERALD	D.	BARGEN		ZD1202007											0	Yes
2018	L	40404	MH2529121		LISA	R.	BECHEL		MH2529121											0	Yes
2018	L	40404	ZD1202227		STUART	D.	BEIST		ZD1202227											0	Yes
2018	L	40404	IN2025999		JODI	F.	BENNER		IN2025999											0	Yes
2018	L	40404	ZD1202272		DEBORAH	A.	BENSMORE		ZD1202272											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		MH2595515											0	Yes
2018	L	40404	ZD1202007		JERALD	D.	BARGEN		ZD1202007											0	Yes
2018	L	40404	MH2529121		LISA	R.	BECHEL		MH2529121											0	Yes
2018	L	40404	ZD1202227		STUART	D.	BEIST		ZD1202227											0	Yes
2018	L	40404	IN2025999		JODI	F.	BENNER		IN2025999											0	Yes
2018	L	40404	ZD1202272		DEBORAH	A.	BENSMORE		ZD1202272											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

From the Home Tab select the grid lines icon and then select "All Borders"

Fiscal Year	Reporting Period	District IRN	EmplMyee ID	Suffix Name	State Staff ID	Date of Birth	Racial/Ethnic Group	Gender	Education Level	Semester Hours	Qualification
2018	L	40404	WR2009105	S	WR2009109	19630601	W	M	3	193	*
2018	L	40404	MH2595515	N	MH2595515	19810530	W	F	2	179	*
2018	L	40404	ZD1202007	N	ZD1202007	19570804	W	M	0	0	*
2018	L	40404	MH2529121	L	MH2529121	19820630	W	F	3	172	*
2018	L	40404	ZD1202227	L	ZD1202227	19840803	W	M	2	141	*

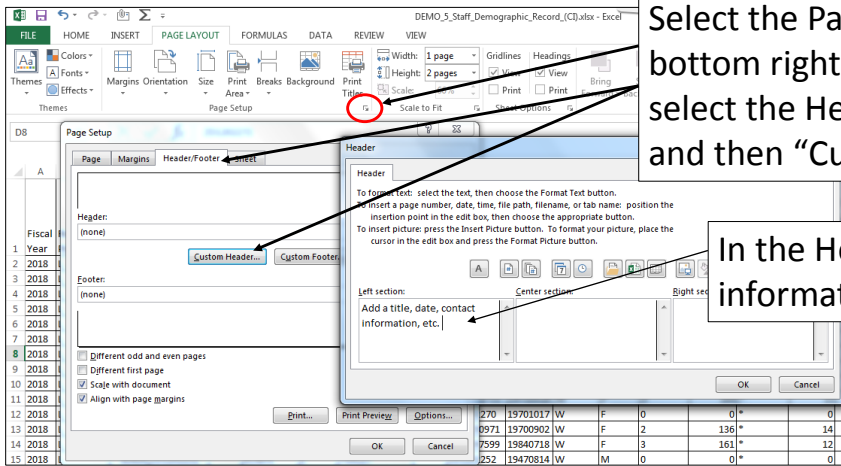
Print Titles at Top of Each Page

From the Page Layout tab select the Print Titles icon

From the Page Setup prompt place cursor in the "Rows to repeat at Top", then select row 1. This will populate the "Rows to Repeat at Top".

Fiscal Year	Reporting Period	District IRN	EmplMyee ID	Suffix Name	State Staff ID	Date of Birth	Racial/Ethnic Group	Gender	Education Level	Semester Hours	Qualification
2018	L	40404	WR2009105	S	WR2009109	19630601	W	M	3	193	*
2018	L	40404	MH2595515	N	MH2595515	19810530	W	F	2	179	*
2018	L	40404	ZD1202007	N	ZD1202007	19570804	W	M	0	0	*
2018	L	40404	MH2529121	L	MH2529121	19820630	W	F	3	172	*
2018	L	40404	ZD1202227	L	ZD1202227	19840803	W	M	2	141	*

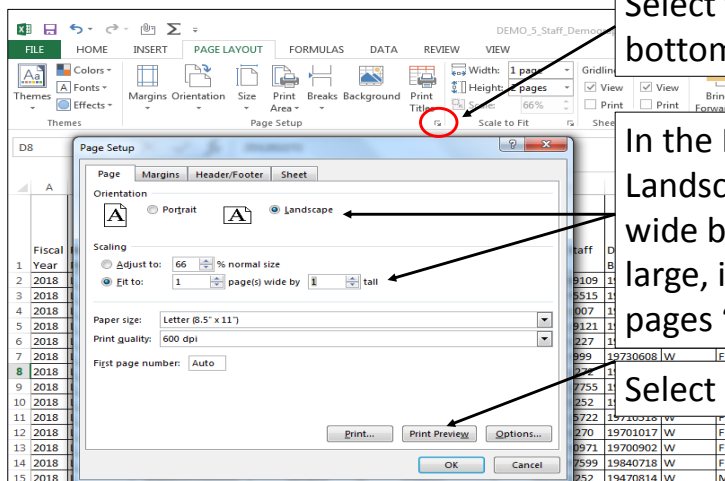
Add Header



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"

Print Preview

Print Preview is a great way to adjust the data on the page prior to printing

Consider using narrow margins or changing the page orientation for a better fit

EMIS Alliance 43

Quick Check

Formatting your reports prior to printing can result in easier to review documents that district staff will appreciate. Adding a title, date and contact information will allow easy tracking of when and to whom the data was sent.

- What columns of data on your report could be hidden or deleted to make the report easier to review?
- Have you included instructions to help understand the data in the report?
- Are you able to set up your report into a printable format?

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

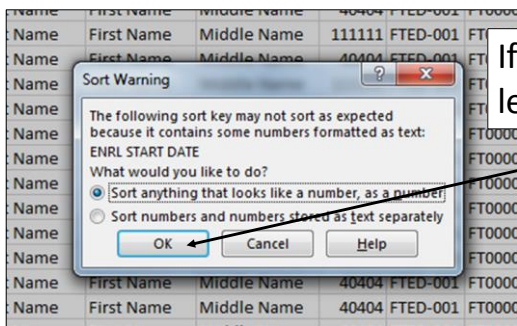
Sort by SSID, then select "Add Level", then sort by "ENRL START DATE", then select "OK"

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							



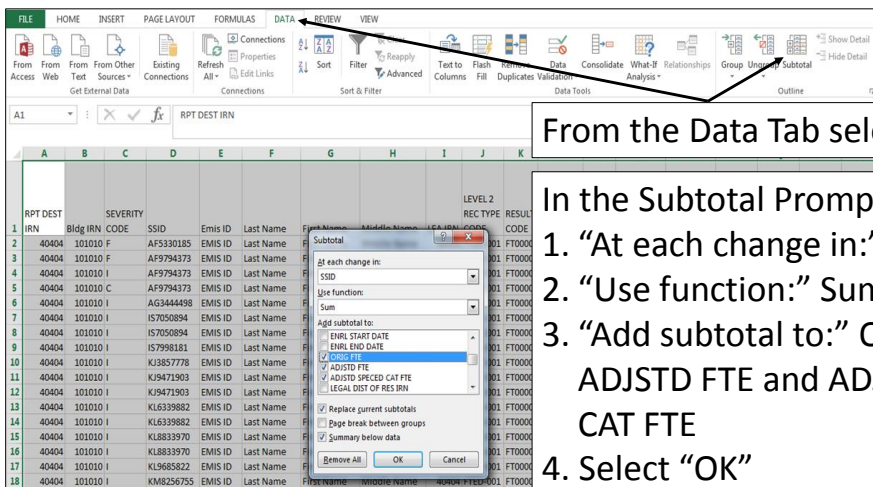
Sort Warning

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
AF5330185 Total																				
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
AF9794373 Total																				
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
AG3444498 Total																				
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
IS7050894 Total																				
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
IS7998181 Total																				
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
AF5330185 Total																						
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
AF9794373 Total																						
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
AG3444498 Total																						
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
IS7050894 Total																						
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
IS7998181 Total																						
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"



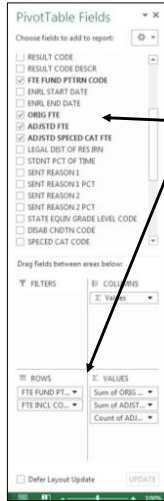
PivotTable Fields

PivotTable Fields are available to select to set up the PivotTable

When inserting a PivotTable, a new tab is opened



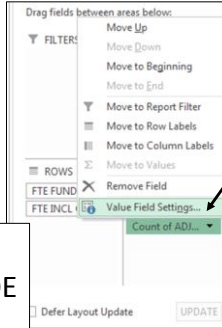
Select PivotTable Fields



Click and Drag fields into the PivotTable areas below

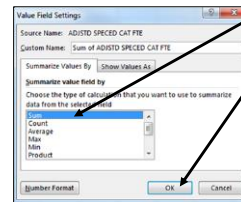
For Rows select:
FTE FUND PTRN CODE
FTE INCL CODE

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
Grand Total	82.697503	72.728599	7

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

EMPLOYEE ID	LAST NAME	FIRST NAME	MIDDLE NAME	SSN	PROJECT CODE	PROJECT CODE DESCRIPTION	FTE FUND PTRN CODE	FTE START DATE	FTE END DATE	FTE FTE	ASSIGNED	ASSIGNED SPECIES			
40404	385550 F	AF330181	EMIS ID	Last Name	First Name	Middle Name	40404	FTE001	770000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385550 F	VQ589751	EMIS ID	Last Name	First Name	Middle Name	40404	FTE001	770000	FTE Detail	NFRG	08/29/2017	12/31/2500	1	0
40404	385550 F	VQ184648	EMIS ID	Last Name	First Name	Middle Name	40404	FTE001	770000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385550 F	AF979427	EMIS ID	Last Name	First Name	Middle Name	40404	FTE001	770000	FTE Detail	NFRG	07/01/2017	12/31/2017	0.939623	0
40404	385550 F	VQ527639	EMIS ID	Last Name	First Name	Middle Name	40404	FTE001	770000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385550 F	NK313773	EMIS ID	Last Name	First Name	Middle Name	40404	FTE001	770000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385550 F	NP935959	EMIS ID	Last Name	First Name	Middle Name	40404	FTE001	770000	FTE Detail	NFRG	07/01/2017	12/31/2500	1	0
40404	385550 F	NQ379662	EMIS ID	Last Name	First Name	Middle Name	40404	FTE001	770000	FTE Detail	NFRG	08/01/2017	12/31/2017	0.937662	0
40404	385550 F	LK400923	EMIS ID	Last Name	First Name	Middle Name	40404	FTE001	770000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385550 F	K3601326	EMIS ID	Last Name	First Name	Middle Name	40404	FTE001	770000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0
40404	385550 F	KP266321	EMIS ID	Last Name	First Name	Middle Name	40404	FTE001	770000	FTE Detail	NFRG	08/01/2017	12/31/2500	1	0

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

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?

