

# Using Excel to Troubleshoot EMIS Data

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# Overview

- Basic, Intermediate, and Advanced 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

- Staff and Course Collection Best Practices
- Prepare the CI and CK files for sharing with others in your district
  - Use Conditional Formatting
  - Add data with VLOOKUPS
  - Create a PivotTable
- Review prepared Staff Demographic (CI) and Staff Employment (CK) files
- Access Excel recorded sessions

# Sharing Staff Data

- Staff data and Course/Student data originate in separate source systems
- The Staff and Course (L) Collection is where the staff, course, and student course assignment data meet
  - When initially running this collection, the results can sometimes be messy
- Sharing staff EMIS data with district staff can be helpful when correcting and verifying the data
- This is not a comprehensive staff and course training but rather some suggestions on using Excel to work through the data

# Troubleshooting Staff and Course Data

- Data in the SIS and the Staff EMIS system should be updated and current for all LEA types
- Use a systematic approach when working through the Staff and Course Collection
  1. Resolve Level 1 Validations
  2. Resolve Excluded Records
  3. Resolve any remaining Missing Staff
  4. Share the CI and CK files to verify the data to be current, correct, and complete
  5. Review other Submission Files and Level 2 Reports

# Resolve Level 1 Validations

If you have Level 1 Validations, a link will appear

**Staff and Course Collection - Initial (FY22)**  
 FY22-L-Stf Crs Init: Collection required for all EMIS reporting entities. The initial staff collection includes staff employed any time in FY22 and st...

**Submissions:** September 23, 2021 - January 28, 2022 (113 days till close)  
**Version:** 1  
**Status:** The collection was submitted today at 01:25:45 PM by [redacted]  
**Submission Status:** Pending Processing (today at 01:25:53 PM)  
**Submission Number:** 2 (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 2 Data](#)

**Staff and Course Collection - Initial (FY22)**  
 Submission Number 1 (attempt 1),

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

**Last Prepared:** September 24, 2021 (14 days ago) at 07:10:46 AM

Record Type	Fatal	Critical	Warning	Info	Total Lvl 1 Er	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	77	811
Mapped Classroom Code Record (CM)	0	0	0	0	0	0	10
Staff Course Record (CU)	0	0	0	0	0	82	853
<a href="#">Staff Demographic Record (CI)</a>	5	0	16	0	21	12	279
<a href="#">Staff Employment Record (CK)</a>	14	0	2	0	16	9	404
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	1842	16175
<b>Total Counts:</b>	<b>19</b>	<b>0</b>	<b>18</b>	<b>0</b>	<b>37</b>	<b>2022</b>	<b>18532</b>

[Generate Full Validation Report](#)

**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

Fix Level 1 Validations first because they can cause Excluded Records and Missing Staff

# Resolve Excluded Records and Missing Staff

**Review Types**

- Detail
- Missing Data

**Output Options**

Zip File:  Download file as a...

File Format:  HTML  
 CSV

Include in CSV files:  Data only  
 Data and F...  
 Data and A...

**Staff and Course Collection - Initial (FY22)**

FY22-L-Stf Crs Init: Collection required for all EMIS reporting entities. The initial staff collection includes staff employed any time in FY22 and st...

Submissions: September 23, 2021 - January 28, 2022 (113 days till close)

Version: 1

Status: The collection was submitted today at 01:25:45 PM by [redacted]

Submission Status: Pending Processing (today at 01:25:53 PM)

Submission Number: 2 (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 2 Data](#)

[Generate Review Data](#)

File	Submission 3			Sub 2
	Valid	Invalid	Total	Valid
<a href="#">Career-Technical_Education...</a>	0	0	0	0
<a href="#">Contract_Only_Staff_Record...</a>	0	0	0	0
<a href="#">Contractor_Staff_Employme...</a>	0	0	0	0
<a href="#">Course_Master_Record_(CN).csv</a>	475	3	478	465
<a href="#">Excluded_Records.csv</a>			10006	
<a href="#">Mapped_Classroom_Code_Record_(CM).csv</a>	0	0	0	0
<a href="#">Staff_Course_Record_(CU).csv</a>	475	3	478	465
<a href="#">Staff_Demographic_Record_(CI).csv</a>	234	11	245	234
<a href="#">Staff_Employment_Record_(CK).csv</a>	308	12	320	308
<a href="#">Staff_Missing_Override_Record_(CP).csv</a>	0	0	0	0
<a href="#">Staff_Missing_Report.csv</a>			144	
<a href="#">Staff_Summer_Employment_Separation_Record_(CL).csv</a>	0	0	0	0
<a href="#">Student_Course_Record_(GN).csv</a>	9256	3	9259	9096
<b>Total counts:</b>	<b>10748</b>	<b>32</b>	<b>20930</b>	

Excluded Records are not included in the data that is reported to ODE

Staff Missing includes those reported in a prior collection without a separation date and who are currently not being reported





# Submission Files, cont'd

File	Submission 5			Sub 4
	Valid	Invalid	Total	Valid
<a href="#">Career-Technical Education Correlated Class Record (CV).csv</a>	0	0	0	0
<a href="#">Contract Only Staff Record (CC).csv</a>				
<a href="#">Contractor Staff Employment Record (CJ).csv</a>				
<a href="#">Course Master Record (CN).csv</a>				
<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>	<b>6207</b>	<b>6</b>	<b>6218</b>	

Start by opening the Staff Employment (CK) file, we will open the Staff Demographic (CI) later

We are going to demonstrate some Excel functions  
Using the CI and CK files but all files should be reviewed

## Quick Check

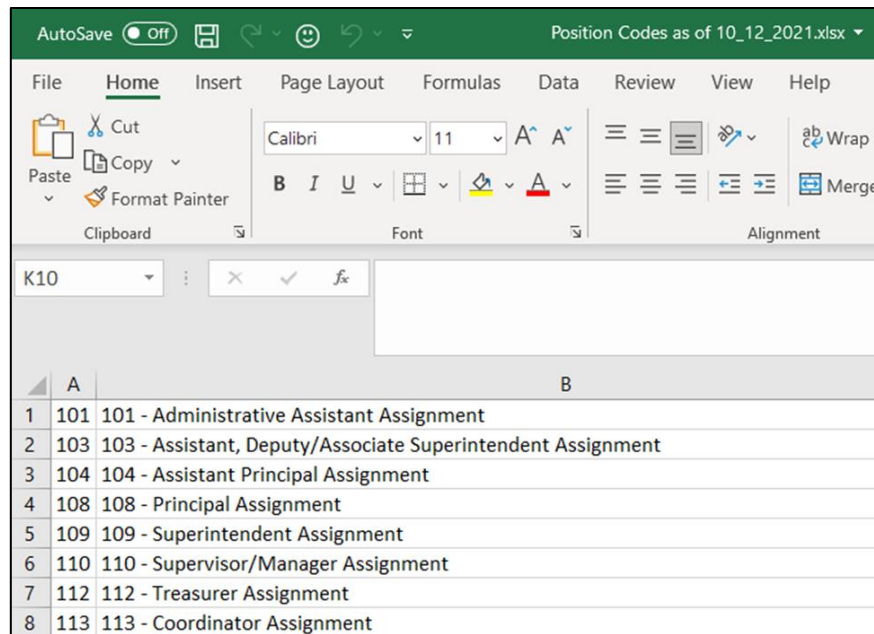
The Staff and Course Collection includes data from two separate source systems and involves more district staff to review the data. It is best to work through errors, excluded records, and missing staff before attempting to review the remaining submission files.

- Have you processed a staff and course collection with current data?
- Have you cleaned up your Level 1 Validations?
- Have you resolved your Excluded Records and Missing Staff?

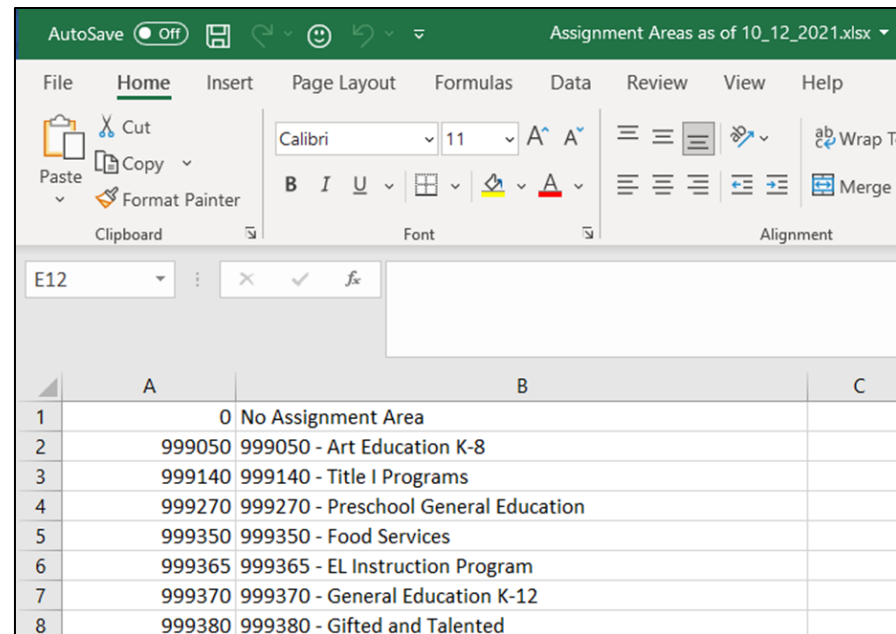
# Preparing the Staff Employment (CK) File

# Files to Open

- Staff Employment Record (CK)
- Your ITC will provide you with two additional files-
  - Position Codes as of 10\_12\_2021
  - Assignment Areas as of 10\_12\_2021



	A	B
1	101	101 - Administrative Assistant Assignment
2	103	103 - Assistant, Deputy/Associate Superintendent Assignment
3	104	104 - Assistant Principal Assignment
4	108	108 - Principal Assignment
5	109	109 - Superintendent Assignment
6	110	110 - Supervisor/Manager Assignment
7	112	112 - Treasurer Assignment
8	113	113 - Coordinator Assignment



	A	B	C
1	0	No Assignment Area	
2	999050	999050 - Art Education K-8	
3	999140	999140 - Title I Programs	
4	999270	999270 - Preschool General Education	
5	999350	999350 - Food Services	
6	999365	999365 - EL Instruction Program	
7	999370	999370 - General Education K-12	
8	999380	999380 - Gifted and Talented	

# Prepare the CK file

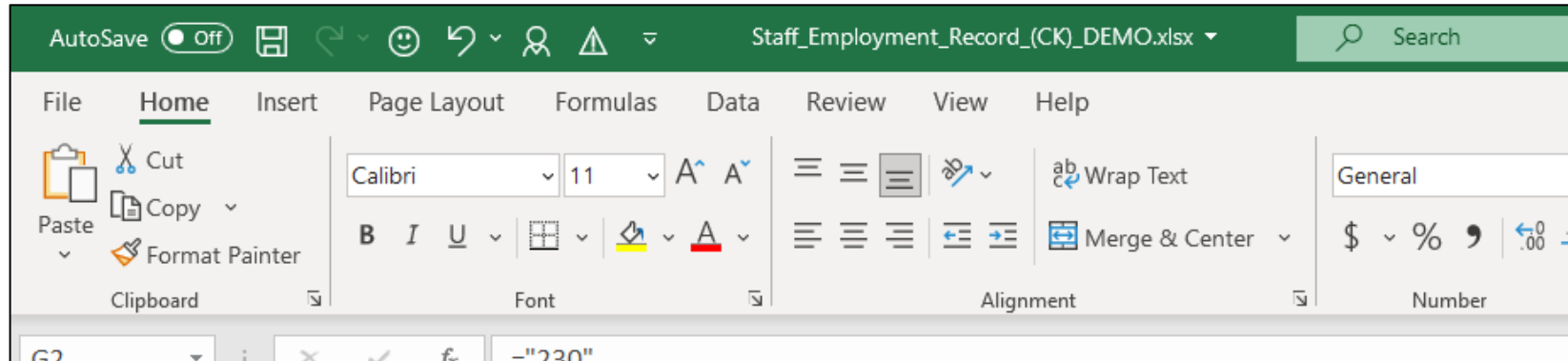
The screenshot shows the Microsoft Excel interface with the following data in the spreadsheet:

	A	B	C	D	E	F	G	H
1	Fiscal Year	Reporting I	District IRN	Employee I	Employee I	State Staff	Position Code	(Ctrl)
2	2022	L	444444	OH244408	LAST, FIRST	OH244408	230	C
3	2022	L	444444	OH244408	LAST, FIRST	OH244408	230	C
4	2022	L	444444	OH246806	LAST, FIRST	OH246806	230	C
5	2022	L	444444	OH246806	LAST, FIRST	OH246806	230	C
6	2022	L	444444	OH246806	LAST, FIRST	OH246806	230	C
7	2022	L	444444	OH246806	LAST, FIRST	OH246806	230	C
8	2022	L	444444	OH246806	LAST, FIRST	OH246806	204	C
9	2022	L	444444	OH246806	LAST, FIRST	OH246806	230	C

With the Staff Employment (CK) file open, see that the values in the Position Code column appear as ="230" which will prevent the VLOOKUP from working

In the next series of slides we will reformat this column

# Copy and Paste



**1. Select the data in the Position Code column without selecting the Header. Tip- Place cursor in cell G2, hold down the Shift and Control keys and press the down arrow**

	Year	Gender	ID	Position Code	Name
7	2022	L	444444	OH246806	LAST, FIRST
8	2022	L	444444	OH246806	LAST, FIRST
9	2022	L	444444	OH246806	LAST, FIRST
10	2022	L	444444	ZD060222	LAST, FIRST
11	2022	L	444444	OS204448	LAST, FIRST
12	2022	L	444444	OS204448	LAST, FIRST
13	2022	L	444444	OS204448	LAST, FIRST
14	2022	L	444444	OH248246	LAST, FIRST
15	2022	L	444444	ZD060226	LAST, FIRST

**2. With the data selected, right click and then select "Copy"**

# Copy and Paste, cont'd

AutoSave Off Staff\_Employment\_Record\_(CK)\_DEMO.xlsx Search

File Home Insert Page Layout Formulas Data Review View Help

Clipboard: Cut, Copy, Paste, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, Currency, Percentage, Thousand Separator

Formula Bar: G2 = "230"

	A	B	C	D	E	F	G
1	Fiscal Year	Reporting District	IRN	Employee	Employee	State Staff	Position
2	2022	L	444444	OH244408	LAST, FIRST	OH244408	230
3	2022	L	444444	OH244408	LAST, FIRST	OH244408	230
4	2022	L	444444	OH246806	LAST, FIRST	OH246806	230
5	2022	L	444444	OH246806	LAST, FIRST	OH246806	230
6	2022	L	444444	OH246806	LAST, FIRST	OH246806	230
7	2022	L	444444	OH246806	LAST, FIRST	OH246806	230
8	2022	L	444444	OH246806	LAST, FIRST	OH246806	204
9	2022	L	444444	OH246806	LAST, FIRST	OH246806	230
10	2022	L	444444	ZD060222	LAST, FIRST	ZD060222	230
11	2022	L	444444	OS204448	LAST, FIRST	OS204448	230
12	2022	L	444444	OS204448	LAST, FIRST	OS204448	899
13	2022	L	444444	OS204448	LAST, FIRST	OS204448	415

Right click again and select the "paste values" icon

# Resolve the Error Flag

AutoSave Off Staff\_Employment\_Record\_(CK)\_DEMO.xlsx

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment

G2 230

	A	B	C	D	E	F	G	H	I	J
1	Fiscal Year	Reporting District	IRN	Employee ID	Employee Name	State	Staff	Position Code	Position Start	Position Stop
2	2022	L	444444	OH244408	LAST, FIRST	OH24	230	C	20120810	20130901
3	2022	L	444444	OH246806	LAST, FIRST	OH24			20200801	20080501
4	2022	L	444444	OH246806	LAST, FIRST	OH24			20180801	20100801
5	2022	L	444444	OH246806	LAST, FIRST	OH24			20041101	20151101
6	2022	L	444444	ZD060222	LAST, FIRST	ZD060222	230	C	20091110	20030821
7	2022	L	444444	OS204448	LAST, FIRST	OS204448	230	C		

**1. With the data still selected, an error flag will appear**

**2. Click the down arrow and select "Convert to Number"**

**3. This will shift the numbers in the column to the right**



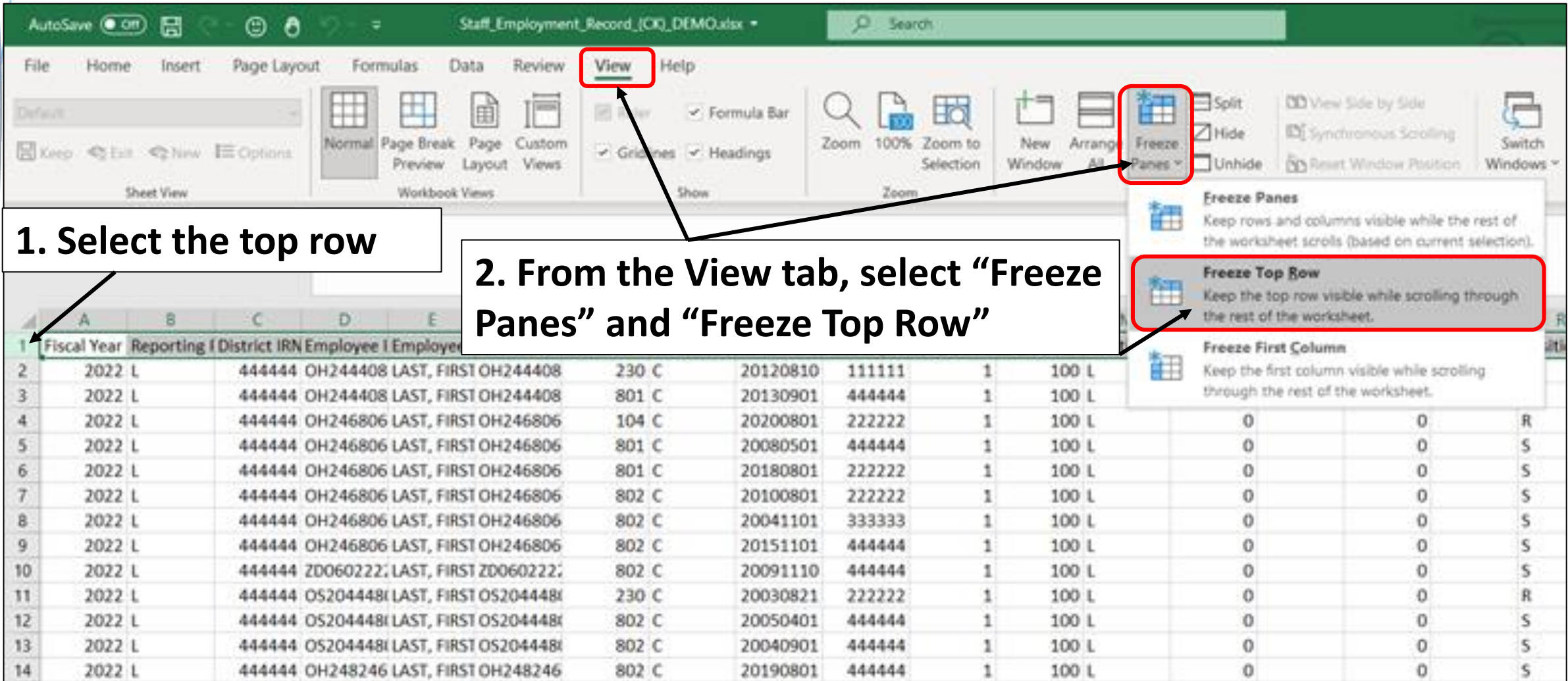
# Format Cells

1. One last time, right click while the data is still selected and choose "Format Cells"

	Fiscal Year	Reporting District	IRN	Employee ID	Employee Name	State Staff Position
1						
2	2022	L	444444	OH244408	LAST, FIRST	OH244408
3	2022	L	444444	OH244408	LAST, FIRST	OH244408
15	2022	L	444444	ZD060226	LAST, FIRST	ZD060226
16	2022	L	444444	OH228668	LAST, FIRST	OH228668
17	2022	L	444444	OH444484	LAST, FIRST	OH444484
18	2022	L	444444	OH422644	LAST, FIRST	OH422644
19	2022	L	444444	OH240464	LAST, FIRST	OH240464
20	2022	L	444444	OH428268	LAST, FIRST	OH428268
21	2022	L	444444	OH428268	LAST, FIRST	OH428268
22	2022	L	444444	OH246468	LAST, FIRST	OH246468
23	2022	L	444444	OH242808	LAST, FIRST	OH242808
24	2022	L	444444	OH242808	LAST, FIRST	OH242808
25	2022	L	444444	OH242808	LAST, FIRST	OH242808
26	2022	L	444444	OH242808	LAST, FIRST	OH242808
27	2022	L	444444	OH446608	LAST, FIRST	OH446608

2. In the Format Cells prompt, select "Number," then set the "Decimal places" to "0", then click "OK"

# Freeze Top Row

The image is a screenshot of the Microsoft Excel interface. The title bar shows the file name "Staff\_Employment\_Record\_(OK\_DEMO).xlsx". The ribbon is set to the "View" tab, which is highlighted with a red box. In the "View" tab, the "Freeze Panes" button is also highlighted with a red box. A dropdown menu is open, showing three options: "Freeze Panes", "Freeze Top Row", and "Freeze First Column". The "Freeze Top Row" option is highlighted with a red box. Two callout boxes with arrows point to the "View" tab and the "Freeze Top Row" option. The spreadsheet below shows a table with columns A through E and rows 1 through 14. Row 1 is highlighted, indicating it is selected.

1. Select the top row

2. From the View tab, select "Freeze Panes" and "Freeze Top Row"

	A	B	C	D	E
1	Fiscal Year	Reporting I	District IRN	Employee I	Employee
2	2022	L	444444	OH244408	LAST, FIRST OH244408
3	2022	L	444444	OH244408	LAST, FIRST OH244408
4	2022	L	444444	OH246806	LAST, FIRST OH246806
5	2022	L	444444	OH246806	LAST, FIRST OH246806
6	2022	L	444444	OH246806	LAST, FIRST OH246806
7	2022	L	444444	OH246806	LAST, FIRST OH246806
8	2022	L	444444	OH246806	LAST, FIRST OH246806
9	2022	L	444444	OH246806	LAST, FIRST OH246806
10	2022	L	444444	ZD060222;	LAST, FIRST ZD060222;
11	2022	L	444444	OS204448	LAST, FIRST OS204448
12	2022	L	444444	OS204448	LAST, FIRST OS204448
13	2022	L	444444	OS204448	LAST, FIRST OS204448
14	2022	L	444444	OH248246	LAST, FIRST OH248246

# Wrap Text in Top Row

From the Home Tab, select "Wrap Text"

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Fiscal Year	Reporting Period	District IRN	Employee ID	Employee Name	State Staff ID	Position Code	Position Status	Position Start Date	Building IRN	Position FTE	Funds Source Percent 1	Position Fund Source 1	Funds Source Percent 2	Position Fund Source 2
1															
2	2022	L	444444	OH244408	LAST, FIRST	OH244408	230	C	20120810	111111	1	100	L	0	
3	2022	L	444444	OH244408	LAST, FIRST	OH244408	801	C	20130901	444444	1	100	L	0	
4	2022	L	444444	OH246806	LAST, FIRST	OH246806	104	C	20200801	222222	1	100	L	0	
5	2022	L	444444	OH246806	LAST, FIRST	OH246806	801	C	20080501	444444	1	100	L	0	
6	2022	L	444444	OH246806	LAST, FIRST	OH246806	801	C	20180801	222222	1	100	L	0	
7	2022	L	444444	OH246806	LAST, FIRST	OH246806	802	C	20100801	222222	1	100	L	0	
8	2022	L	444444	OH246806	LAST, FIRST	OH246806	802	C	20041101	333333	1	100	L	0	
9	2022	L	444444	OH246806	LAST, FIRST	OH246806	802	C	20151101	444444	1	100	L	0	
10	2022	L	444444	ZD060222	LAST, FIRST	ZD060222	802	C	20091110	444444	1	100	L	0	
11	2022	L	444444	OS204448	LAST, FIRST	OS204448	230	C	20030821	222222	1	100	L	0	
12	2022	L	444444	OS204448	LAST, FIRST	OS204448	802	C	20050401	444444	1	100	L	0	

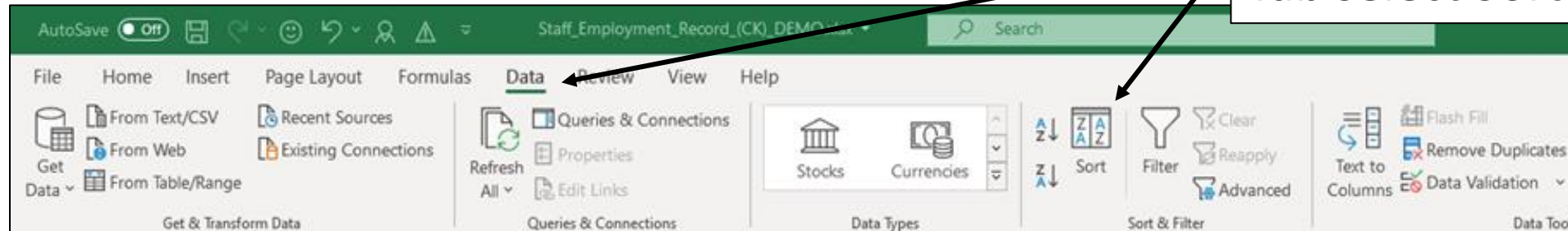
# Add Filters

From the Home tab, select “Sort & Filter” and then “Filter”

	Fiscal Year	Reporting Period	District IRN	Employee ID	Employee Name	State Staff ID	Position Code	Position Status	Position Start Date	Building IRN	Position FTE	Source Percent 1	Fund Source 1	Source Percent 2	Fund Source 2	Source Percent 3	Fund Source 3	Position Type	Position App	Work Day	Days
1	2022	L	444444	OH2444084	LAST, FIRST, MIDDLE	OH2444084	230	C	20120810	111111	1	100	L	0	0	0	R		1	7.5	184
2	2022	L	444444	OH2444084	LAST, FIRST, MIDDLE	OH2444084	801	C	20130901	444444	1	100	L	0	0	0	S		1	3	0
3	2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	104	C	20200801	222222	1	100	L	0	0	0	R		1	7.5	214
4	2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	801	C	20080501	444444	1	100	L	0	0	0	S		1	1	10

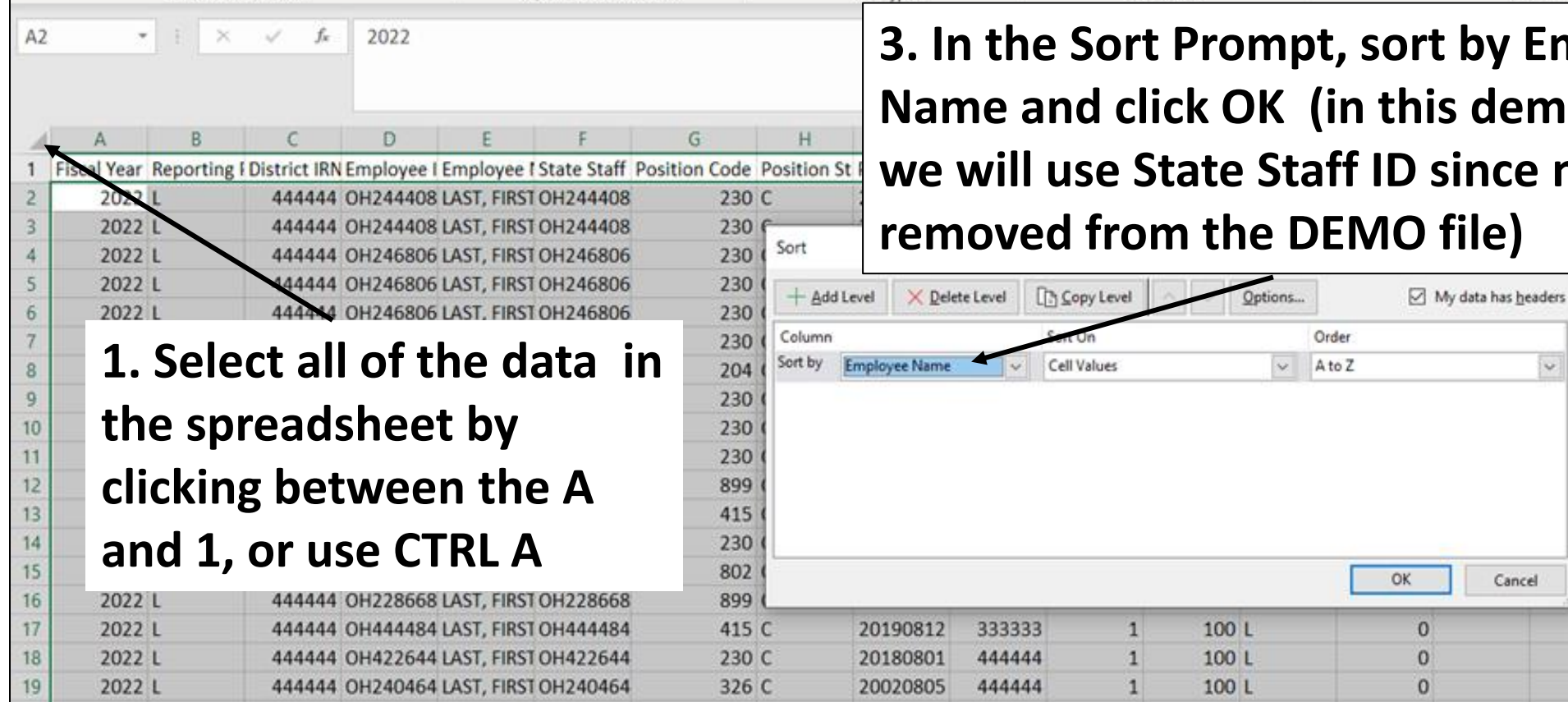
# Sort the File

2. From the Data Tab select Sort



3. In the Sort Prompt, sort by Employee Name and click OK (in this demonstration we will use State Staff ID since names were removed from the DEMO file)

1. Select all of the data in the spreadsheet by clicking between the A and 1, or use CTRL A



# Conditional Formatting

1. Select a column to highlight duplicates. We selected State Staff ID, but you should select "Employee Name"

2. From the Home tab select Conditional Formatting

3. Select "Highlight Cell Rules, then "Duplicate Values"

	Fiscal Year	Reporting Period	District IRN	Employee ID	Employee Name	State Staff ID	Position	Position	Position	Building	Position	Source
1	2022	L	444444	OH2444084	LAST, FIRST, MIDDLE	OH2444084						
2	2022	L	444444	OH2444084	LAST, FIRST, MIDDLE	OH2444084						
3	2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064						
4	2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	801	C	20080501	444444	1	
5	2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	801	C	20180801	222222	1	
6	2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	802	C	20100801	222222	1	
7	2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064						

# Conditional Formatting cont'd

AutoSave Off Staff\_Employment\_Record\_(CK)\_DEMO.xlsx Search

File Home Insert Page Layout Formulas Data Review View Help

Clipboard: Paste, Cut, Copy, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Paragraph, Color, Background Color

Paragraph: Wrap Text, Merge & Center

Number: General, Currency, Percentage, Decimals

Styles: Conditional Formatting, Table

Formula Bar: F1, State Staff ID

	A	B	C	D	E	F	G	H	I	J	K	L	M			
	Fiscal Year	Reporting Period	District IRN	Employee ID	Employee Name	State Staff ID	Position Code	Position Status				Funds	Position			
1	2022	L	444444	OH2444084	LAST, FIRST, MIDDLE	OH2444084	230	C								
2	2022	L	444444	OH2444084	LAST, FIRST, MIDDLE	OH2444084	801	C								
3	2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	104	C								
4	2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	801	C								
5	2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	801	C								
							801	C								
							802	C				20100801	222222	1	100	L

Click "OK", then see that any staff member with more than one job record is highlighted

Duplicate Values ? X

Format cells that contain:

Duplicate values with Light Red Fill with Dark Red Text

OK Cancel

Since you used "Employee Name", highlighted records will appear in Column E instead

# Add Column for VLOOKUP

AutoSave Off Staff\_Employment\_Record\_(CK)\_DEMO.xlsx Search

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number

H1 Position Status

Calibri 11 A A \$ % ;

B I   Merge & Center

Cut Copy Paste Options: Paste Special... Insert Delete Clear Contents Format Cells... Column Width... Hide Unhide

	A	B	C	D	E	F	G	H	I	J	K	L	M	
	Fiscal Year	Reporting Period	District IRN	Employee ID	Employee Name	State Staff Code	Position Code	Position Status			FTE	Position Source	Funds Percent	
1	2022	L	444444	AU2004688	LAST, FIRST, MIDDLE	AU2004688	230	U			2	0.5	100	L
2					MIDDLE	AU2004688	801	C			4	1	100	L
3					MIDDLE	BG20111111	212	U			1	1	100	L
4					MIDDLE	BG2022480	504	C			4	0.5	100	L
5					MIDDLE	BG2028224	230	C			2	1	100	L
6					MIDDLE	CL2008426	230	C			3	1	100	L
7					MIDDLE	CL2008426	801	C			4	1	100	L
8	2022	L	444444	CU2002668	LAST, FIRST, MIDDLE	CU2002668	230	C			2	1	100	L
9	2022	L	444444	CU2002668	LAST, FIRST, MIDDLE	CU2002668	802	C			2	1	100	L
10	2022	L	444444	IA2000202	LAST, FIRST, MIDDLE	IA2000202	203	C			2	1	100	L
11	2022	L	444444	IA2000202	LAST, FIRST, MIDDLE	IA2000202	801	C			4	1	100	L
12	2022	L	444444	IA2000202	LAST, FIRST, MIDDLE	IA2000202	801	C			4	1	100	L
13	2022	L	444444	IA2000202	LAST, FIRST, MIDDLE	IA2000202	801	C			4	1	100	L
14	2022	L	444444	KU2008244	LAST, FIRST, MIDDLE	KU2008244	109	U			4	1	100	L
15	2022	L	444444	MO2002644	LAST, FIRST, MIDDLE	MO2002644	230	U			3	1	100	L

Right click on column H then  
Select "Insert" to add a column



# Name the Column and Select VLOOKUP

The screenshot shows the Microsoft Excel interface with the following elements:

- Excel Ribbon:** File, Home, Insert, Page Layout, Formulas, Data, Review, View, Help.
- Home Tab:** Clipboard (Cut, Copy, Paste, Format Painter), Font (Calibri, 11, Bold, Italic, Underline, Color, Background Color), Alignment (Wrap Text, Merge & Center), Number (General, Currency, Percentage, Decimals, Thousands Separator, Negative Numbers Show As Positive).
- Formula Bar:** Shows the active cell H2 with an equals sign (=) and a red circle around the function icon.
- Worksheet:** A table with columns: District, Employee ID, Employee Name, State Staff ID, Code, Position, Position Description, Status, Start Date, IR. The 'Position Description' column is highlighted in red, and cell H2 is also highlighted in red.
- Insert Function Dialog Box:** Opened over the worksheet. It shows a search box with the text "Type a brief description of what you want to do and then click Go". Below the search box, there is a list of functions under the heading "Select a function:". The function "VLOOKUP" is selected and highlighted in blue. Below the list, the VLOOKUP function syntax is shown: `VLOOKUP(lookup_value,table_array,col_index_num,range_lookup)` and a brief description: "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."

**2. Place cursor in Cell H2 then select the function icon. An equal sign will appear in Cell H2**

**1. Name the new column "Position Description"**

**3. Select VLOOKUP then OK. If VLOOKUP doesn't appear in the list, type it in the search box and hit "Go"**

# Begin the VLOOKUP

AutoSave Off Staff\_Employment\_Record\_(CK)\_DEMO.xlsx Search

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number

H2 =VLOOKUP(G2)

Fiscal Year	Reporting Period	District	Employee ID	Employee Name	State Staff Code	Position Code	Position Description	Position Status	Position Start Date
2022	L	444444	AU2004688	LAST, FIRST, MIDDLE	AU2004688	230	=VLOOKUP(G2)	U	20050823
2022	L	444444	AU2004688	LAST, FIRST, MIDDLE	AU2004688	801		C	20040823
2022	L	444444	BG20111111	LAST, FIRST, MIDDLE	BG20111111	212		U	19860819

Function Arguments

VLOOKUP

Lookup\_value: G2 = 230

Table\_array: | = number

Col\_index\_num: | = number

Range\_lookup: | = logical

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.

Table\_array is a table of text, numbers, or logical values, in which data is retrieved. Table\_array can be a reference to a range or a range name.

Formula result =

Help on this function

OK Cancel

1. Place cursor in the Lookup value box in the Function Arguments prompt, then click in cell G2

2. Place cursor in the Table array Box then toggle to the "Position Codes as of 10\_12\_2021.xlsx" Spreadsheet

# Complete the VLOOKUP Prompt

AutoSave Off Position Codes as of 10\_12\_2021.xlsx Search

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number

70 799 799 - Other Operative Assignment

71 801 801 - Advisor Assignment

72 802 802 - Coaching Assignment

73 803 803 - Athletic Trainer Assignment

74 899 899 - Other

75 901 901 - Attend

76 902 902 - Custod

77 904 904 - Food S

78 905 905 - Guard/

79 906 906 - Monito

80 908 908 - Ground

81 909 909 - Attend

82 910 910 - School

83 999 999 - Other

84

85

86

87

Function Arguments

VLOOKUP

Lookup\_value G2 = 230

Table\_array '12\_2021.xlsx]Sheet1!\$A\$1:\$B\$83' = {101,"101 - Administrati

Col\_index\_num 2 = 2

Range\_lookup FALSE = FALSE

in the leftmost column of a table, and then returns a value in the same row from a column you spe  
an ascending order.

Range\_lookup is a logical value: to find the closest match in the first column (sorted in ascending order) =  
TRUE or omitted; find an exact match = FALSE.

Formula result = 230 - Teacher Assignment

[Help on this function](#) OK Cancel

**1. Select Cell A1 and then select all populated cells. This will populate the Table Array Box**

**2. Enter the number 2 in the Col Index Num Box, since you want data from the second column**

**3. Type FALSE in the Range Lookup Box and click OK**

# VLOOKUP Brings Back Position Descriptions

AutoSave Off Staff\_Employment\_Record\_(CK)\_DEMO.xlsx Search

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number

H2 =VLOOKUP(G2,['Position Codes as of 10\_12\_2021.xlsx]Sheet1'!\$A\$1:\$B\$83,2,FALSE)

	A	B	C	D	E	F	G	H	I	J
	Fiscal Year	Reporting Period	District IRN	Employee ID	Employee Name	State Staff ID	Position Code	Position Description	Position Status	Position Start Date
2	2022	L	444444	AU2004688	LAST, FIRST, MIDDLE	AU2004688	230	230 - Teacher Assignment		2005082
3	2022	L	444444	AU2004688	LAST, FIRST, MIDDLE	AU2004688	801	801 - Advisor Assignment	C	20040823 444444
4	2022	L	444444	BG20111111	LAST, FIRST, MIDDLE	BG20111111	212	212 - Supplemental Service Teac	U	19860819 111111
5	2022	L	444444	BG2022480	LAST, FIRST, MIDDLE	BG2022480	504	504 - Records Managing Assignn	C	20140730 444444
6	2022	L	444444	BG2028224	LAST, FIRST, MIDDLE	BG2028224	230	230 - Teacher Assignment	C	20110826 222222
7	2022	L	444444	CL2008426	LAST, FIRST, MIDDLE	CL2008426	230	230 - Teacher Assignment	C	20070817 333333
8	2022	L	444444	CL2008426	LAST, FIRST, MIDDLE	CL2008426	801	801 - Advisor Assignment	C	20100901 444444
9	2022	L	444444	CU2002668	LAST, FIRST, MIDDLE	CU2002668	230	230 - Teacher Assignment	C	20010629 222222
10	2022	L	444444	CU2002668	LAST, FIRST, MIDDLE	CU2002668	802			20041101 222222
11	2022	L	444444	IA2000202	LAST, FIRST, MIDDLE	IA2000202	203		C	19970822 222222
12	2022	L	444444	IA2000202	LAST, FIRST, MIDDLE	IA2000202	801		C	20040823 444444
13	2022	L	444444	IA2000202	LAST, FIRST, MIDDLE	IA2000202	801		C	20090301 444444
14	2022	L	444444	KU2008244	LAST, FIRST, MIDDLE	KU2008244	109		U	20140720 444444
15	2022	L	444444	MO2002644	LAST, FIRST, MIDDLE	MO2002644	230		U	20140414 333333

**Cell H2 contains the first matching value. Drag or double click the bottom right corner of cell H2 to populate the values down**

# Copy and Paste Values

Staff\_Employment\_Record\_(CK)\_DEMO.xlsx

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number

H1 Position Description

	C	D	E	F	G	H
	District	Employee ID	Employee Name	State Staff Code	Position	Position Description
1	IRN	Employee ID	Employee Name	State Staff Code	Code	Position Description
140	444444	OH4040606	LAST, FIRST, MIDDLE	OH4040606	801	801 - Advisor Assignment
141	444444	OH4044200	LAST, FIRST, MIDDLE	OH4044200	230	230 - Teacher Assignment
142	444444	OH4044200	LAST, FIRST, MIDDLE	OH4044200	801	801 - Advisor Assignment
143	444444	OH4044200	LAST, FIRST, MIDDLE	OH4044200	801	801 - Advisor Assignment
144	444444	OH4044200	LAST, FIRST, MIDDLE	OH4044200	801	801 - Advisor Assignment
145	444444	OH4048444	LAST, FIRST, MIDDLE	OH4048444	108	108 - Principal Assignment
146	444444	OH4080024	LAST, FIRST, MIDDLE	OH4080024	202	202 - Counseling Assignme
147	444444	OH4080680	LAST, FIRST, MIDDLE	OH4080680	230	230 - Teacher Assignment
148	444444	OH4080680	LAST, FIRST, MIDDLE	OH4080680	801	801 - Advisor Assignment
149	444444	OH4080860	LAST, FIRST, MIDDLE	OH4080860	212	212 - Supplemental Service
150	444444	OH4084640	LAST, FIRST, MIDDLE	OH4084640	802	802 - Coaching Assignment
151	444444	OH4086800	LAST, FIRST, MIDDLE	OH4086800	505	505 - Teaching Aide Assign
152	444444	OH4200000	LAST, FIRST, MIDDLE	OH4200000	230	230 - Teacher Assignment
153	444444	OH4202028	LAST, FIRST, MIDDLE	OH4202028	230	230 - Teacher Assignment
154	444444	OH4204464	LAST, FIRST, MIDDLE	OH4204464	230	230 - Teacher Assignment
155	444444	OH4206280	LAST, FIRST, MIDDLE	OH4206280	230	230 - Teacher Assignment

Clipboard icon with "123"

To “disconnect” the data in Column H from the position codes spreadsheet, select Column H, then right click and “Copy”, then right click again, and paste values (Clipboard icon with “123”)

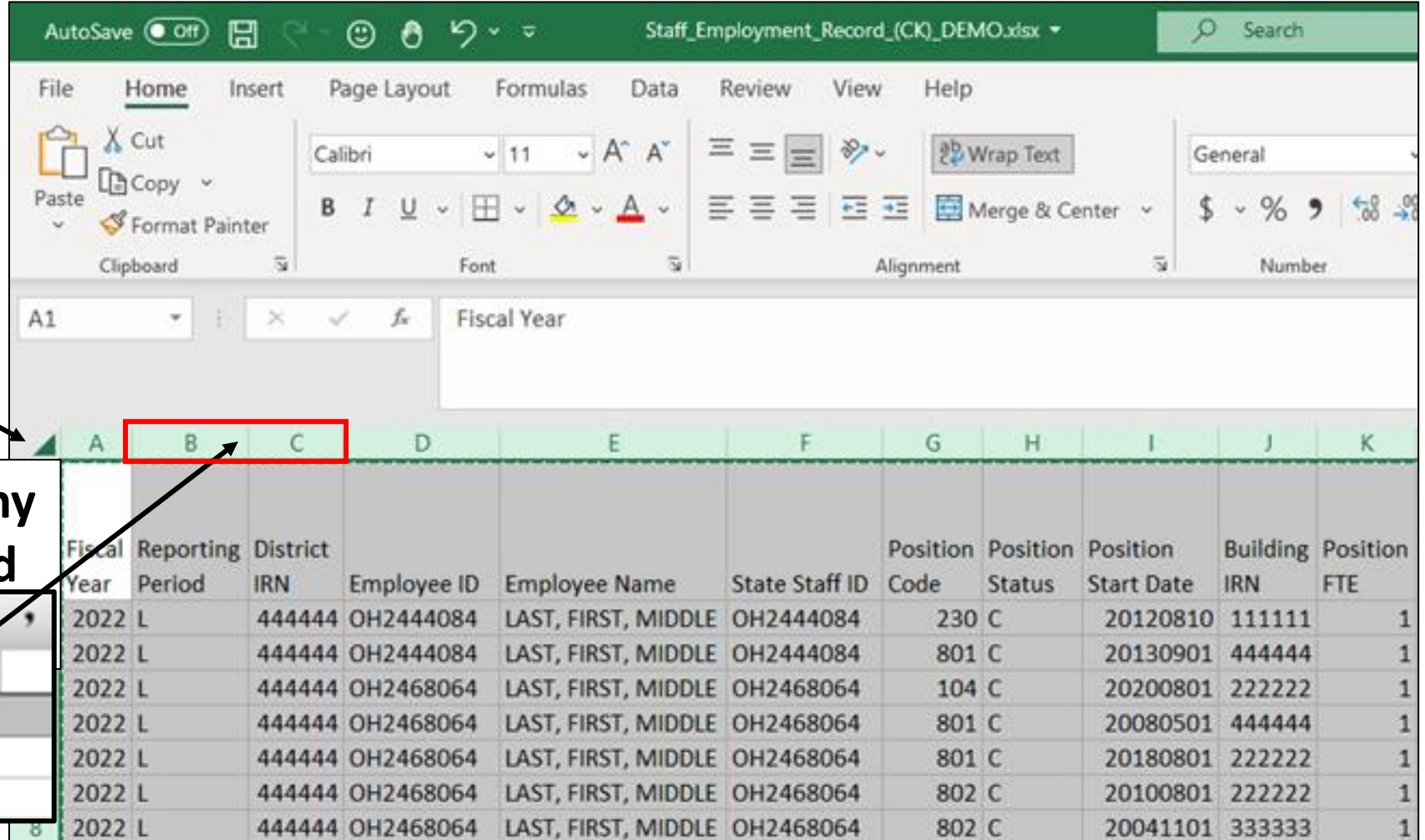
# Repeat the VLOOKUP

- Add a column next to the “Assignment Area” column
- Add a title “Assignment Description”
- Place cursor in cell AA2
- Click on the Insert Function link (fx) and select VLOOKUP
  - Lookup value – click in cell Z2
  - Table array is data in Assignment Areas as of 10\_12\_2021.xlsx
  - Col Index Number is 2
  - Range Lookup is FALSE
- Copy values down, then copy and paste values

# Justify Columns

Click on the triangle between Column A and Row 1 to select the entire spreadsheet

Place cursor between any two column headers and double click



The screenshot shows the Microsoft Excel interface with the 'Home' ribbon selected. The spreadsheet contains data for 'Fiscal Year' and various employee details. The columns are labeled A through K. A red box highlights the triangle between columns B and C. An inset shows a close-up of the cursor between columns B and C with a red circle around the double-click symbol.

Fiscal Year	Reporting Period	District IRN	Employee ID	Employee Name	State Staff ID	Position Code	Position Status	Position Start Date	Building IRN	Position FTE
2022	L	444444	OH2444084	LAST, FIRST, MIDDLE	OH2444084	230	C	20120810	111111	1
2022	L	444444	OH2444084	LAST, FIRST, MIDDLE	OH2444084	801	C	20130901	444444	1
2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	104	C	20200801	222222	1
2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	801	C	20080501	444444	1
2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	801	C	20180801	222222	1
2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	802	C	20100801	222222	1
2022	L	444444	OH2468064	LAST, FIRST, MIDDLE	OH2468064	802	C	20041101	333333	1

## Quick Check

When seeking feedback from others in your district, it is best to format the data to be more user-friendly. Simple Excel functions like VLOOKUP can add additional definitions to columns of data that may be difficult to translate.

- Are you able to prepare the file with sorting and conditional formatting?
- Were you able to successfully complete VLOOKUPS on the file?
- Did you save the position code and assignment area code files for the next time you will prepare the CK file for review?



# Reviewing the Prepared CI and CK

# Prepare the Staff Demographic (CI) File

- Prepare your Staff Demographic (CI) file
- Next, we will discuss ways to dig deeper into staff data

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
	Fiscal Year	Reporting Period	District IRN	Employee ID	Prefix	First Name	Middle Name	Last Name	Suffix	State Staff	Date of Birth	Racial/Ethnic Group	Gender	Education Level	Semester Hours	Early Childhood Education Qualification	Authorized Teaching Experience Years	Total Experience Years in Education	Principal Experience Years in Education	Record Is Valid
2	2022	L	444444	OH2444084		FIRST NAME		LAST NAME		OH2444084	19790410	W	F	2	150	*	17	17	0	Yes
3	2022	L	444444	OH2468064		FIRST NAME		LAST NAME		OH2468064	19810916	W	M	3	221	*	16	16	1	Yes
4	2022	L	444444	ZD0602222		FIRST NAME		LAST NAME		ZD0602222	19700815	W	M	0	0	*	0	0	0	Yes
5	2022	L	444444	OS2044480		FIRST NAME		LAST NAME		OS2044480	19590412	W	F	3	211	*	20	20	0	Yes
6	2022	L	444444	OH2482464		FIRST NAME		LAST NAME		OH2482464	19781124	W	M	2	136	*	0	0	0	Yes
7	2022	L	444444	ZD0602266		FIRST NAME		LAST NAME		ZD0602266	19640914	W	F	0	0	*	0	0	0	Yes
8	2022	L	444444	OH2286688		FIRST NAME		LAST NAME		OH2286688	19781227	W	M	0	0	*	0	0	0	Yes
9	2022	L	444444	OH4444842		FIRST NAME		LAST NAME		OH4444842	19770615	N	F	0	0	*	0	0	0	Yes
10	2022	L	444444	OH4226444		FIRST NAME		LAST NAME		OH4226444	19930221	B	F	0	0	*	0	0	0	Yes
11	2022	L	444444	OH2404648		FIRST NAME		LAST NAME		OH2404648	19770112	W	M	0	0	*	0	0	0	Yes

**Refer to EMIS Manual section 3.3 Staff Demographic Record (CI) and other related sections**

# Staff Demographic (CI) Records

Analyze the data -

- One per staff member
- All data should be correct, current, and complete
- Pay close attention to the accuracy of -
  - Education Level
  - Early Childhood Education Qualification
  - Authorized Teaching Experience Years
  - Total Experience Years in Education
  - Principal Experience Years in Education
- All records and elements should be verified
- Share this data with data owners in your LEA
- **Remove Employee IDs if they contain Social Security Numbers before sending this to anyone for review (can leave column and header just remove values)**

# Prepared Staff Employment (CK) File

These screenshots are from the prepared Staff Employment (CK) file

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	Fiscal Year	Reporting Period	District IRN	Employee ID	Employee Name	State Staff ID	Position Code	Position Description	Position Status	Position Start Date	Building IRN	Position FTE	Funds Source Percent	Position Fund Source Percent	Funds Source Percent	Position Fund Source Percent	Funds Source Percent	Position Fund Source Percent
2	2022	L	444444	AU2004688	LAST, FIRST, MIDDLE	AU2004688	230	230 - Teacher Assignment	U	20050823	222222	0.5	100	L	0		0	
3	2022	L	444444	AU2004688	LAST, FIRST, MIDDLE	AU2004688	801	801 - Advisor Assignment	C	20040823	444444	1	100	L	0		0	
4	2022	L	444444	BG20111111	LAST, FIRST, MIDDLE	BG20111111	212	212 - Supplemental Service Teaching Assignment	U	19860819	111111	1	100	L	0		0	
5	2022	L	444444	BG2022480	LAST, FIRST, MIDDLE	BG2022480	504	504 - Records Managing Assignment	C	20140730	444444	0.5	100	L	0		0	
6	2022	L	444444	BG2028224	LAST, FIRST, MIDDLE	BG2028224	230	230 - Teacher Assignment	C	20110826	222222	1	100	L	0		0	
7	2022	L	444444	CL2008426	LAST, FIRST, MIDDLE	CL2008426	230	230 - Teacher Assignment	C	20070817	333333	1	100	L	0		0	

	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI
	Position Type	Type of Appointment	Length of Work Days	Scheduled Work Days	Pay Amount/Rate	Extended Service	Assignment Area	Assignment Description	Position Separation Reason	Local Contract Code	Grade Level Assigned	Grade Level Assigned	Qualified Paraprofessional	Position Separation Date	Special Education FTE	Record Valid	
T		1	3.75	0	H	43.81	0	999370	999370 - General Education	1	1	**	**	*	7/2/2015	0	Yes
S		1	1	0	A	3652	0	0	No Assignment Area	*	3	**	**	*		0	Yes
R		1	7.5	184	A	82581	0	999414	999414 - Special Education	1	1	KG	4	*	5/31/2020	1	Yes
R		2	4	260	H	29.23	0	0	No Assignment Area	*	1	**	**	*		0	Yes
									Education	*	1	9	12	*		0	Yes
									Education	*	1	**	**	*		0	Yes

Refer to EMIS Manual section 3.4 Staff Employment Record (CK) and other related sections



# Review the Staff Employment (CK) Records

Analyze the data –

- At least one per staff member
- All data should be correct, current, and complete
- Pay close attention to
  - Position Codes and Assignment Areas
  - Position FTEs and Special Education FTEs
  - Pay Rate/Amount (Salaries)
  - Staff with multiple job records
    - Are Building IRNs, Position FTEs, and Salaries reported correctly?
    - Watch for duplicate records

# Review the Staff Employment (CK) Records, cont'd

- Filter and highlight records with separation dates
  - Are these records for current, reportable separations?
  - Are there staff who separated that are not being reported appropriately?
- All records and elements should be verified
- Share this data with data owners in your LEA
  - Remove Employee IDs if they contain Social Security Numbers before sending this to anyone for review (can leave column and header just remove values)

## Quick Check

Staff EMIS data must be reviewed for accuracy and completeness. Staff EMIS data is used for Local Report Card data and for teacher certification purposes. It is important to verify this data with data owners within the LEA.

- Have you prepared your files for sharing and removed SSNs as applicable?
- Have you included instructions to help understand the data in the report?
- Have you identified the data owners in your school that can verify and update the data as needed?

# Create a PivotTable



# Super Simple PivotTable for CK Records

- Open the Prepared Staff Employment (CK) File
- We are going to create a PivotTable that contains
  - Position Code Descriptions
  - Separated by Building and District IRNs
  - Summed by Position FTE
  - Filter on Position Status

# Create a PivotTable

The screenshot shows the Microsoft Excel interface with the 'Insert' tab selected. The 'PivotTable' icon in the 'Tables' group is highlighted with a red box. A black arrow points from this icon to the 'Create PivotTable' dialog box. The dialog box is open, showing the 'Table/Range' field with the value '=Staff\_Employment\_Record\_(CK)\_DE!\$A:\$AI'. The 'New Worksheet' option is selected under 'Choose where you want the PivotTable report to be placed'. The 'OK' button is highlighted with a blue box, and a black arrow points from it to the text box on the right.

AutoSave  Off

Prepared Staff\_Employment\_Record\_(CK)\_DEMO.xlsx

File Home **Insert** Page Layout Formulas Data Review View Help

PivotTable Recommended Tables

Table

Pictures Illustrations

SmartArt Screenshot

Get Add-ins My Add-ins

Recommended Charts

Charts

Fiscal Year

D E F G H

Yea Period IRN Employee ID Employee Name State Staff Code Position Description

1 2022 L 444444 AU200468

2 2022 L 444444 AU200468

3 2022 L 444444 BG201111

4 2022 L 444444 BG202248

5 2022 L 444444 BG202822

6 2022 L 444444 CL200842

7 2022 L 444444 CL200842

8 2022 L 444444 CU200266

9 2022 L 444444 CU200266

10 2022 L 444444 IA200020

11 2022 L 444444 IA200020

12 2022 L 444444 IA200020

13 2022 L 444444 IA200020

14 2022 L 444444 KU200824

15 2022 L 444444 MO200264

16 2022 L 444444 MO200264

17 2022 L 444444 OD200246

18 2022 L 444444 OD200246

Create PivotTable

Choose the data that you want to analyze

Select a table or range

Table/Range: '=Staff\_Employment\_Record\_(CK)\_DE!\$A:\$AI'

Use an external data source

Choose Connection...

Connection name:

Use this workbook's Data Model

Choose where you want the PivotTable report to be placed

New Worksheet

Existing Worksheet

Location:

Choose whether you want to analyze multiple tables

Add this data to the Data Model

OK Cancel

Select all data, then  
from the Insert Tab,  
select PivotTable

Leave the Create  
PivotTable prompt as  
defaulted and click "OK"

# Choose PivotTable Fields

The screenshot shows an Excel spreadsheet with a PivotTable. The PivotTable is located in the range B3:F17. The PivotTable fields are:

- Filters: (All)
- Columns: Elementary, Middle, High School, District, Grand Total
- Rows: 104 - Assistant Principal Assignment, 108 - Principal Assignment, 109 - Superintendent Assignment, 110 - Supervisor/Manager Assignment, 112 - Treasurer Assignment, 113 - Coordinator Assignment, 114 - Education Administrative Specialist Assignment, 202 - Counseling Assignment, 203 - Librarian/Media Assignment, 204 - Remedial Specialist Assignment, 212 - Supplemental Service Teaching Assignment (Serves Students with Disability Conditions Only), 230 - Teacher Assignment, 299 - Other Professional - Educational Assignment
- Values: Sum of Position FTE

The PivotTable Fields task pane on the right shows the following configuration:

- Filters: Position Status
- Columns: Building IRN
- Rows: Position Description
- Values: Sum of Position FTE

The data in the PivotTable is as follows:

Position Description	Elementary	Middle	High School	District	Grand Total
104 - Assistant Principal Assignment		2			2
108 - Principal Assignment	2	3	1		6
109 - Superintendent Assignment				2	2
110 - Supervisor/Manager Assignment				2	2
112 - Treasurer Assignment				2	2
113 - Coordinator Assignment		1	0.33		1.33
114 - Education Administrative Specialist Assignment				1	1
202 - Counseling Assignment	1	1	2		4
203 - Librarian/Media Assignment	2	1			3
204 - Remedial Specialist Assignment	4.03		1		5.03
212 - Supplemental Service Teaching Assignment (Serves Students with Disability Conditions Only)	5	2	4		11
230 - Teacher Assignment	31	36.02	22.07		89.09
299 - Other Professional - Educational Assignment	1				1

- In the PivotTable Fields box move**
- 1. Position Status in the Filters Box**
  - 2. Position Description to the Rows Box**
  - 3. Building IRN to the Columns Box**
  - 4. Position FTE to the Values Box (be sure it says "Sum of")**

# CK Record PivotTable

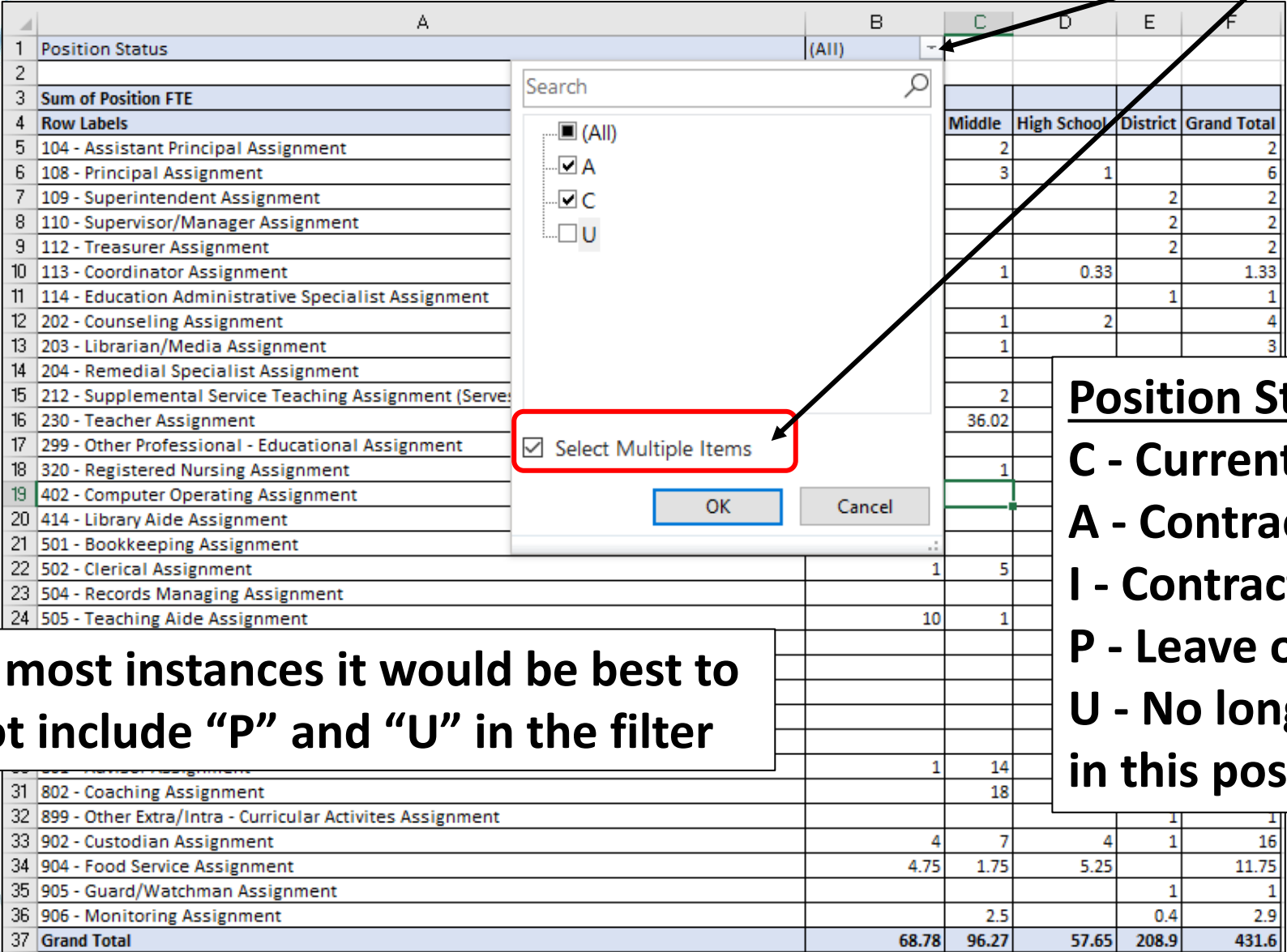
The screenshot shows the Microsoft Excel interface with the Home tab selected. The Borders dropdown menu is open, and the 'All Borders' option is highlighted with a red box. A text box on the left contains the following instructions:

Select the data in the PivotTable, then from the Home Tab select the Borders icon and the “All Borders”

The PivotTable data is as follows:

Row Labels	B	C	D	E	F	G
104 - Assistant Principal Assignment	111111	222222	333333	444444	(blank)	Grand Total
108 - Principal Assignment	2	3	1			2
109 - Superintendent Assignment				2		2
110 - Supervisor/Manager Assignment				2		2
112 - Treasurer Assignment				2		2
113 - Coordinator Assignment		1	0.33			1.33
114 - Education Administrative Specialist Assignment				1		1
202 - Counseling Assignment	1	1	2			4
203 - Librarian/Media Assignment	2	1				3

# Position Status Filter



Position Status	(All)	C	D	E	F	
Sum of Position FTE						
Row Labels						
104 - Assistant Principal Assignment						
108 - Principal Assignment						
109 - Superintendent Assignment						
110 - Supervisor/Manager Assignment						
112 - Treasurer Assignment						
113 - Coordinator Assignment						
114 - Education Administrative Specialist Assignment						
202 - Counseling Assignment						
203 - Librarian/Media Assignment						
204 - Remedial Specialist Assignment						
212 - Supplemental Service Teaching Assignment (Serve						
230 - Teacher Assignment						
299 - Other Professional - Educational Assignment						
320 - Registered Nursing Assignment						
402 - Computer Operating Assignment						
414 - Library Aide Assignment						
501 - Bookkeeping Assignment						
502 - Clerical Assignment		1	5			
504 - Records Managing Assignment						
505 - Teaching Aide Assignment		10	1			
802 - Coaching Assignment		1	14			
899 - Other Extra/Intra - Curricular Activites Assignment			18			
902 - Custodian Assignment		4	7	4	1	
904 - Food Service Assignment		4.75	1.75	5.25	16	
905 - Guard/Watchman Assignment				1	1	
906 - Monitoring Assignment			2.5	0.4	2.9	
Grand Total		68.78	96.27	57.65	208.9	431.6

1. From the dropdown select appropriate Position Statuses to include (check “Select Multiple Items” to make individual selections), then click “OK”

**Position Status Element Options**  
C - Current position in the district  
A - Contracted personnel - Agency  
I - Contracted personnel - Individual  
P - Leave of absence  
U - No longer employed by district in this position

In most instances it would be best to not include “P” and “U” in the filter



# CK Record PivotTable

	A	B	C	D	E	F
1	Position Status	(Multiple Items)				
2						
3	Sum of Position FTE	Column Labels				
4	Row Labels	Elementary	Middle	High School	District	Grand Total
5	104 - Assistant Principal Assignment		1			1
6	108 - Principal Assignment	1	3	1		5
7	109 - Superintendent Assignment				1	1
8	112 - Treasurer Assignment				1	1
9	113 - Coordinator Assignment		1			1
10	114 - Education Administrative Specialist Assignment				1	1
11	202 - Counseling Assignment	1	1	1		3
12	203 - Librarian/Media Assignment	2	1			3
13	204 - Remedial Specialist Assignment	3		1		4
14	212 - Supplemental Service Teaching Assignment (Serves Students with Disability Conditions Only)	4	1	4		9
15	230 - Teacher Assignment	25	24.02	19.07		68.09
16	299 - Other Professional - Educational Assignment	1				1
17	320 - Registered Nursing Assignment	2	1	1	1	5
18	402 - Computer Operating Assignment				1	1
19	414 - Library Aide Assignment			1		1
20	501 - Bookkeeping Assignment				3	3
21	502 - Clerical Assignment		3	1	2	6
22	504 - Records Managing Assignment				0.5	0.5
23	505 - Teaching Aide Assignment	4	1			5
24	603 - General Maintenance Assignment				5	5
25	605 - Mechanic Assignment				1	1
26	611 - Foreman Assignment				4	4
27	702 - Dispatching Assignment				1	1
28	704 - Vehicle Operating (Bus) Assignment				10	10
29	801 - Advisor Assignment	1	13	4	50	68
30	802 - Coaching Assignment		17	11	105	133
31	899 - Other Extra/Intra - Curricular Activities Assignment				1	1
32	902 - Custodian Assignment	2	4	4		10
33	904 - Food Service Assignment	4.75	1.5	5.25		11.5
34	<b>Grand Total</b>	<b>50.75</b>	<b>72.52</b>	<b>53.32</b>	<b>187.5</b>	<b>364.09</b>

Drill down to staff level data by clicking specific values

Use this PivotTable as a high-level view of current staff by Position Code and Position FTE by building



## Quick Check

PivotTables are an effective tool to summarize and use in the data review process. Data can easily be drilled down to staff level data. Administrators often appreciate high level summary data such as the PivotTable we just created.

- Did you successfully create a simple PivotTable?
- Are you able to drill down to staff level data?
- Who in your district might like to see a summary of staff data?

# Accessing Recorded Excel Sessions



# EMIS Alliance Public Space

This website contains ODE ITC Conference Call notes, EMIS Alliance Instructional Videos, and a calendar of upcoming EMIS Alliance Trainings

The screenshot shows a web browser at the URL [community.mcoecn.org/display/EM/EMIS+Alliance+Public+Space](https://community.mcoecn.org/display/EM/EMIS+Alliance+Public+Space). The page header includes navigation links for Management Council, Community, Spaces, and Forums. The main content area is titled "EMIS Alliance Public Space" and includes a welcome message and a search bar. A sidebar on the left contains a "PAGE TREE" with a red box highlighting the "FY21 EMIS Alliance Instructional Vid" link. A "Featured Pages" section on the right lists several resources.

Management Council Community Spaces Forums

EMIS Alliance Public EMIS Alliance

PAGE TREE

- FY22 ODE EMIS Conference Calls
- FY21 ODE EMIS Conference Calls
- ODE EMIS Conference Calls
- EMIS Alliance Local Training Events
- **FY21 EMIS Alliance Instructional Vid**
- FY20 EMIS Alliance Instructional Vid
- FY19 EMIS Alliance Instructional Vid
- FY18 EMIS Alliance Instructional Vid

Pages

## EMIS Alliance Public Space

Created by Ryan McClay, last modified by Andrew Tompkins on Jun 05, 2020

### Welcome to the EMIS Alliance Community

EMIS Alliance is a project collaboration between the Ohio Department of Education, the Management Council, and the Information Technology Centers.

The project goal is to improve the capacity to provide quality data by implementing a shared training program available to all Ohio districts and schools.

Search this documentation

#### Featured Pages

- ▣ FY19 EMIS Alliance Instructional Video Resources
- ▣ FY21 ODE EMIS Conference Calls
- ▣ FY22 ODE EMIS Conference Calls
- ▣ ODE EMIS Conference Calls



# FY21 Excel Video

- Enrollment Headcount Summary Report
  - Best Practices
- Enrollment Headcount Detail Report
  - PivotTable Ideas
- FTE Detail Report
  - PivotTable Example

# FY20 Excel Video

- Simple formulas to troubleshoot student FTEs
- VLOOKUP to add LEA names to a report
- Macro to format an FTE Detail report
- Concatenation and conditional formatting to verify calendar data and student data

# FY19 Excel Video

- Create a Macro to Format a Spreadsheet
- Calendar Data Verification
- Create a Dropdown List in Excel
- FTE Detail Report Subtotaling

# FY18 Excel Video

- 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

# Summary

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

# Resources

- EMIS Manual
- Access previous EMIS Alliance sessions
  - <https://community.mcoecn.org/display/EM/EMIS+Alliance+Public+Space>
- Microsoft Excel Help within Excel “?” Articles and Videos
- Google it
- Microsoft Excel Classes
- Your ITC

# Questions?

**If you would like a certificate of attendance for this training, you must complete the below feedback form within 5 business days of this training**

<https://tinyurl.com/EA-District-Feedback>