I-Star Report Exports

Presented By

Harrisburg Project

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2 Topics

❖ Export Student Search Results

❖ Delete columns in Excel

❖ Filter Data in Excel

❖ Sort Data in Excel

❖ Create Pivot table with Excel results

3 EXPORT Student Search Results

1. Select Search criteria

2. Click Search

3. Click Export to Excel

4. Locate Excel download to open

4 EXPORT Export I-Star Reports

1. Click the Reports-> Application Reports

2. Select Report Type, Report Category and the name of the report for export

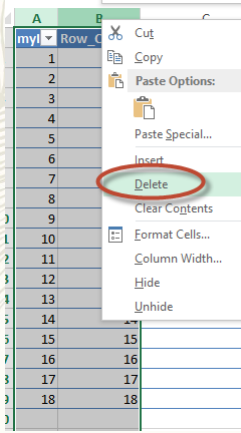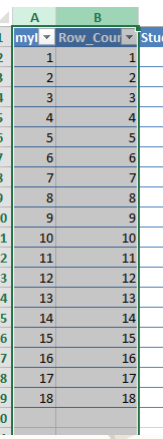3. Select any desired filters, then click Export Report

5 Delete Columns in Excel

Click on the letters to hi-lite columns

Right click and select Delete

- ❖ Columns do not have to be deleted to manipulate the data in Excel, but it can help simplify the spreadsheet
- ❖ Another way to start with a clean set of data is to add an additional sheet to the workbook, then copy and paste relevant data from the original sheet to the new sheet
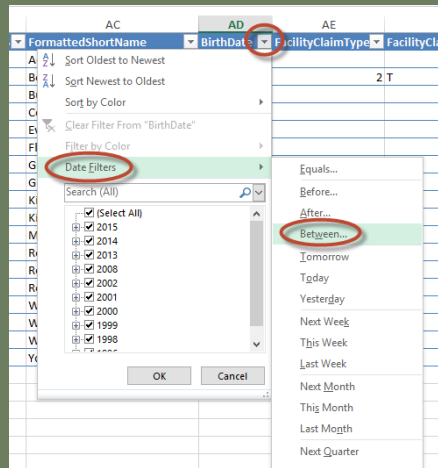
Sheet 1

RECORDS FOUND — New sheet

6 Filter on Age

1. Locate column 'BirthDate'
2. Click drop down arrow
3. Select Date Filters
4. Select Between

7   Age 3-5 Filter

1. Count back 5 years from today's date
2. Enter that date into 'is after or equal to'
3. Leave the default set to 'And'
4. Count back 3 years from today's date
5. Enter that date into 'is before or equal to'
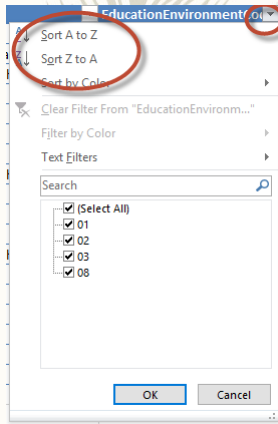6. Click OK.
7. Check your results!!

8   Fund Code Filter

1. Locate column to filter
2. Click the drop down arrow
3. Uncheck the data you do not want in the column
4. Click OK

9   Sort Data in Excel

1. Locate column to sort
2. Click the drop down arrow
3. Click A to Z to sort the data in chronological order. Z to A for reverse.
4. Click OK
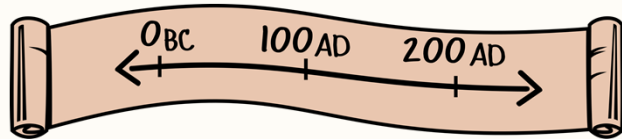
10   Create Pivot Table in Excel

1. Click Insert tab
2. Click Pivot Table button
3. Click the range selector then hi-lite the area of data needed for the table
4. For simplicity, select New Worksheet
5. Click OK

Create Pivot Table in Excel

PivotTable Fields

Choose fields to add to report:
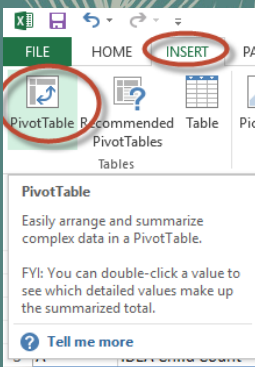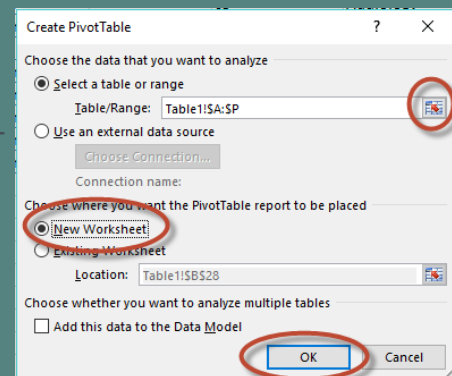
- ☐ FundCode
- ☐ FundDescription
- ☑ **EducationEnvironmentCode**
- ☐ EducationEnvironmentDescription
- ☐ TermCode
- ☐ TermDescription
- ☐ GuardianTypeId
- ☐ RelServicesCodes
- ☐ RelServicesDesc
- ☐ SchoolYear
- ☑ **DisabilitieCodes**
- ☐ PercentTimeOut
- ☐ PercentSpecialEd
- ☐ ErrorCount
- ☑ **studentSISId**
- ☐ FormattedShortName

Drag fields between areas below:

- ▼ FILTERS
- COLUMNS: EducationEnvi...
- ≡ ROWS: DisabilitieCo...
- ∑ VALUES: Count of stud...

1. Click on the data elements to compart and drag them to the areas below the list.
2. Always count on StudentSISId by dragging it to Values.
3. Then put the two areas being comparted in the columns and/or rows.

In the example, we are comparing Disability and Educational Environment Code.

| Count of studentSISId | EE | | | | | |
Disability	01	02	03	08	(blank)	Grand Total
A	2					2
D	1	6	3	2		12
D,E		1				1
D,K			1			1
I		1				1
N				1		1
(blank)						
Grand Total	3	8	4	3		18

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12 Create Pivot Table in Excel

1. Click the Analyze tab

ANALYZE | DESIGN

Insert Timeline | Filter Connections | Refresh | Change Data Source | Clear | Select | Move PivotTable | Fields, Items, & Sets | OLAP Tools | Relationships | PivotChart

All Charts
- Recent
- Templates
- Column
- Line
- Pie
- Bar
- Area
- X Y (Scatter)
- Stock
- Surface
- Radar
- Combo

2. Click Pivot Chart

3. Select the type of chart to display the data

Count of studentSISId

EducationEnvironmentC...
- 01
- 02
- 03
- 08
- (blank)

DisabilitieCodes

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I-Star
QUESTIONS.TRAINING. SUPPORT

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