



Advanced Excel

*Helpful Tools for
Migrant Reporting*



Pivot Tables

- **Pivot tables** are used to summarize, sort, reorganize, group, count, total or average data stored in a database. It allows its users to transform columns into rows and rows into columns.

When or why would I use **EXCEL** or **Pivot Tables** in **MEP?**

- We often have to produce or decipher a lot of data.
- **SAVE TIME**
- Make sure data is accurate.
- Check data about enrollment or services.
- Database is not giving you all the reports you need.

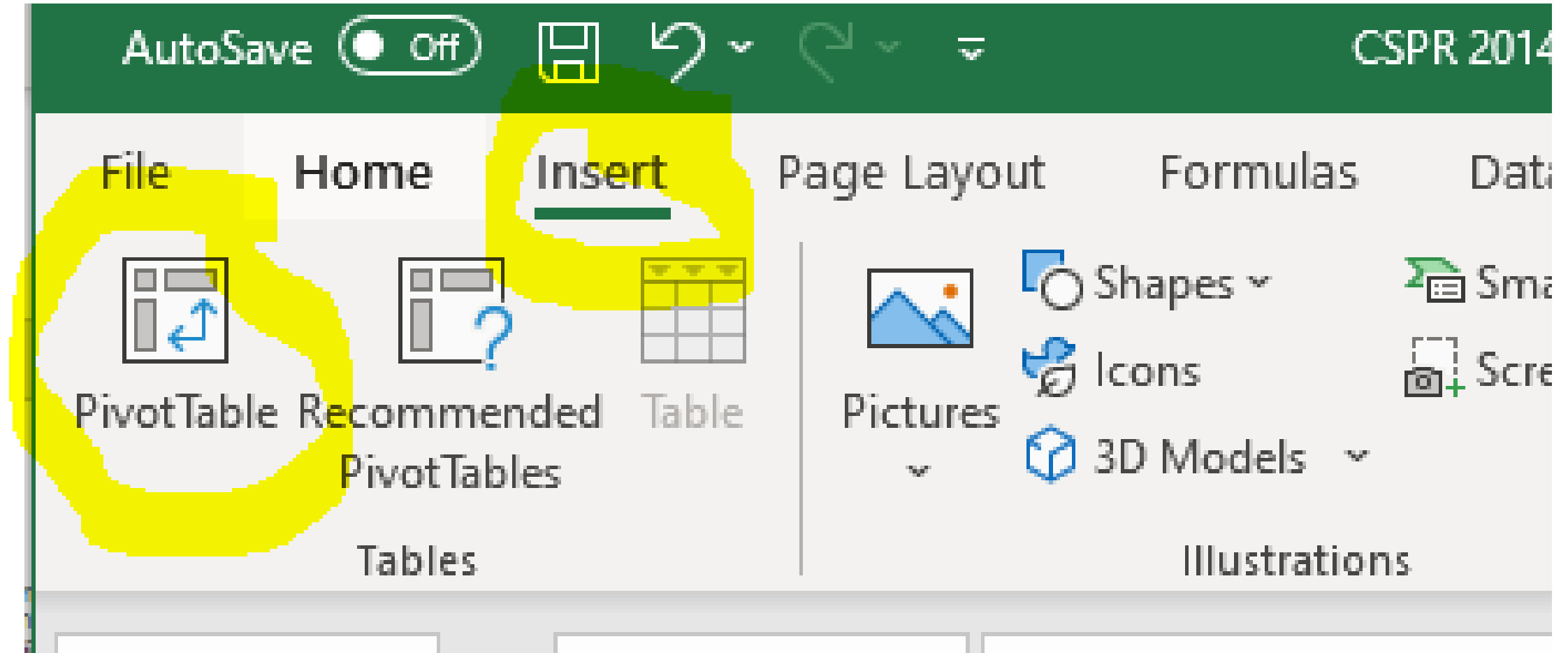




Pivot Tables

- They can actually be surprisingly simple to utilize—and, they're sure to remove a lot of headaches from your data management duties.
- Put simply, a pivot table summarizes your data. It empowers you to extract significant trends or findings from what is otherwise a totally overwhelming spreadsheet.

Let's get started



Creating a Pivot Table

The screenshot shows the Microsoft Excel interface with a data table and the 'Create PivotTable' dialog box open. The data table has the following columns:

Stedest ID	State Id	Grade	County Name	Age Grade
TNO-28957	4016924	OOS	MACON COUNTY	560
TNO-26483	4317335	11	DEKALB COUNTY	210
TNO-27721	3938277	4	HAMILTON COUNTY	300
TNO-28011	3975306	OOS	ROBERTSON COUNTY	740
TNO-27983	3975306	OOS	HAMILTON COUNTY	330
TNO-28012	3975306	OOS	MACON COUNTY	560
TNO-27793		OOS	SUMNER COUNTY	830
TNO-28684		OOS	RHEA COUNTY	720
TNO-29106		BT3	JEFFERSON COUNTY	450
TNO-28228	4344634	1	JEFFERSON COUNTY	450
TNO-28227		OOS	ROBERTSON COUNTY	740
TNO-28571		OOS	#WASHINGTON COUNTY	900
TNO-29180		OOS	DEKALB COUNTY	210
TNO-28099	3570700	8	RHEA COUNTY	720
TNO-28506		3	WARREN COUNTY	890
TNO-28341		3	WARREN COUNTY	890
TNO-28339		1	WARREN COUNTY	890
TNO-28340		5	WARREN COUNTY	890
TNO-28981	3674735	5	VERTON COUNTY	670
TNO-28982	3839389	4	VERTON COUNTY	670
TNO-29107		OOS	RHEA COUNTY	720
TNO-29258	4537713	KG	HAMBLEN COUNTY	320
TNO-29257	4537712	3	HAMBLEN COUNTY	320
TNO-28827		OOS	JOHNSON COUNTY	460
TNO-28720		OOS	JOHNSON COUNTY	460
TNO-17183	3565838	8	HAMBLEN COUNTY	320
TNO-28727		OOS	JOHNSON COUNTY	460
TNO-28730		OOS	JOHNSON COUNTY	460
TNO-28584		OOS	SMITH COUNTY	800
TNO-28213		OOS	FRANKLIN COUNTY	260
TNO-29290		OOS	GREENE COUNTY	300
TNO-28944		OOS	RHEA COUNTY	720
TNO-27573		OOS	GREENE COUNTY	300
TNO-29293		OOS	GREENE COUNTY	300
TNO-27372	4193336	5	KNOX COUNTY	470
TNO-27733	4315342	2	JOHNSON COUNTY	460
TNO-26864	3624397	4	RHEA COUNTY	721
TNO-27497		OOS	HAMBLEN COUNTY	320

The 'Create PivotTable' dialog box is open, showing the following options:

- Choose the data that you want to analyze:**
 - Select a table or range
 - Table/Range:
 - Use an external data source
 - 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

This is a close-up view of the 'Create PivotTable' dialog box. It contains the following elements:

- Title:** Create PivotTable
- Choose the data that you want to analyze:**
 - Select a table or range
 - Table/Range:
 - Use an external data source
 - 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
- Buttons:** OK, Cancel

File Home Insert Page Layout Formulas Data Review View Help Acrobat **PivotTable Analyze** Design

PivotTable Name: PivotTable1 | Active Field: | Options | Field Settings | Drill Down | Drill Up | Expand Field | Collapse Field | Group Selection | Ungroup | Group Field | Group

Insert Slicer | Insert Timeline | Filter Connections | Refresh | Change Data Source | Data | Clear | Select | Move | Actions

Fields, Items, & Sets | OLAP Tools | Relationships | Calculations | PivotChart | Recommended PivotTables | Tools | Show

A3

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1																		
2																		
3																		
4																		
5																		
6																		
7																		
8																		
9																		
10																		
11																		
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28																		
29																		
30																		
31																		

PivotTable1

To build a report, choose fields from the PivotTable Field List

PivotTable Fields

Choose fields to add to report:

Search

- Last Name
- First Name
- Birth Date
- Age
- Sex
- Race
- Student ID
- State Id
- Grade
- Countenrollment
- County Name

Drag fields between areas below:

Filters	Columns
Rows	Values

Defer Layout Update | Update

Sheet1 | 2014-2015 | Eligible Students | Served PP | Instructional PP | Served Summer | PFS | PFS Served

The fields in the 'Choose fields to add to report' area can be dragged into the following four main Pivot Table areas:

4 Areas

Understanding the areas

Values

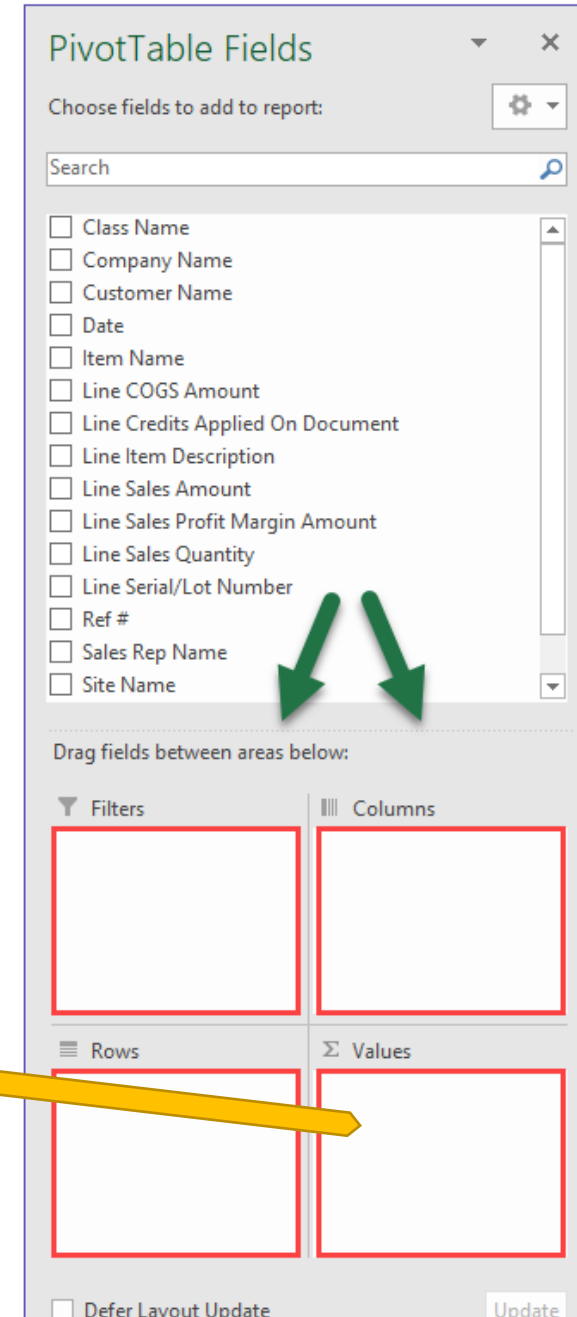
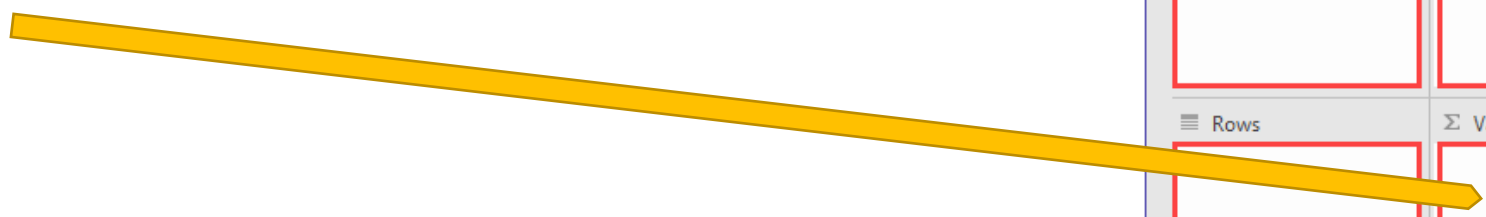
Values are the engine of any analysis, because they represent MEASURES, e.g. Sum of Quantity, Sum of amount, Avg Rate, Maximum Credit Limit, etc.

Filters

Columns

Rows

Values



Sum of Sales ex: of Value



The screenshot shows an Excel spreadsheet with a PivotTable. The PivotTable is located in cells A3:B4 and has the following data:

Sum of Line Sales Amount	Total
Total	498,631.46

The PivotTable Fields task pane is open on the right side of the screen. It shows the following fields:

- Class Name
- Company Name
- Customer Name
- Date
- Item Name
- Line COGS Amount
- Line Credits Applied On Document
- Line Item Description
- Line Sales Amount
- Line Sales Profit Margin Amount
- Line Sales Quantity
- Line Serial/Lot Number
- Ref #
- Sales Rep Name
- Site Name

The 'Line Sales Amount' field is selected and is being dragged to the 'Values' area of the PivotTable. The 'Values' area currently contains 'Sum of Line Sales Amount'. The 'Filters' and 'Columns' areas are empty.

The fields in the 'Choose fields to add to report' area can be dragged into the following four main Pivot Table areas:

4 Areas

Understanding the areas

Rows

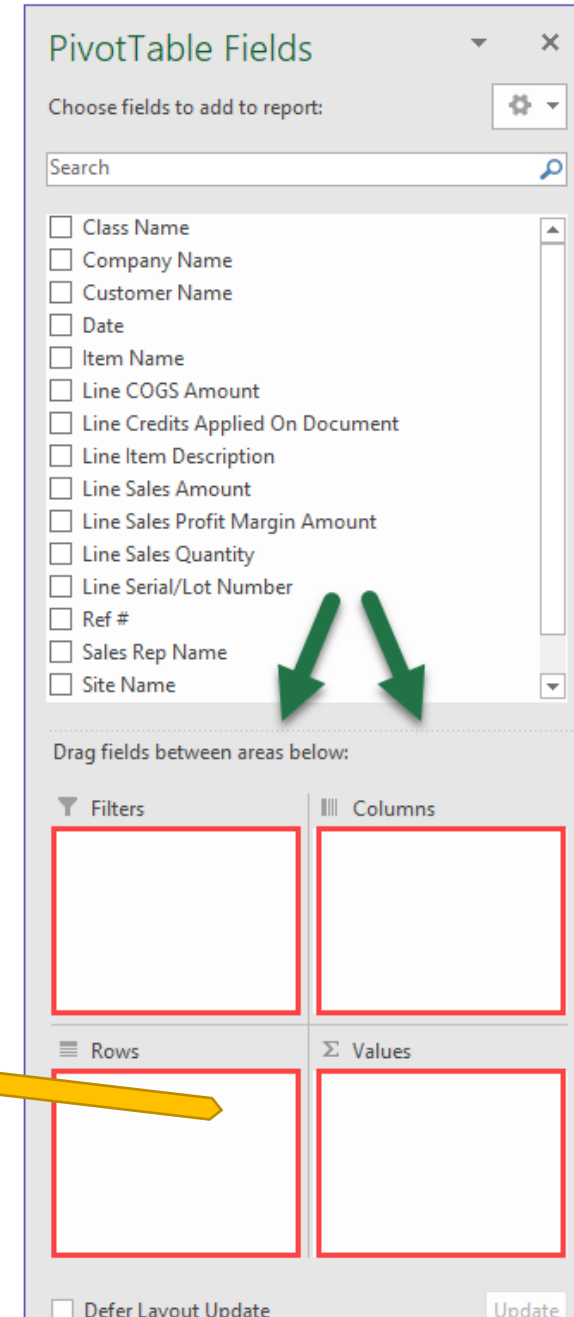
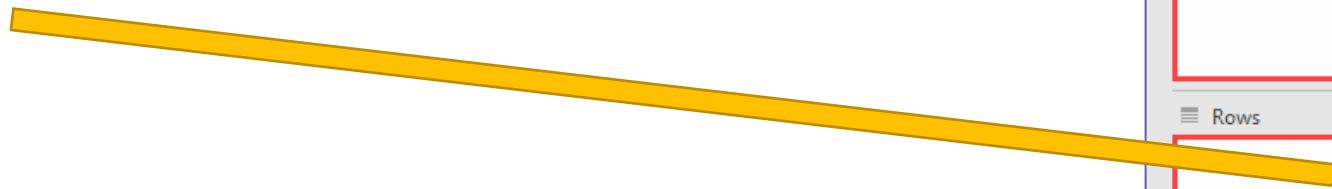
Row Labels provide CONTEXT for the items you place in the Values box. In other words you GROUP BY the items you place in the Rows area.

Filters

Columns

Values

Rows



PivotTable Fields

Choose fields to add to report:

Search

- Class Name
- Company Name
- Customer Name
- Date
- Item Name
- Line COGS Amount
- Line Credits Applied On Document
- Line Item Description
- Line Sales Amount
- Line Sales Profit Margin Amount
- Line Sales Quantity
- Line Serial/Lot Number
- Ref #
- Sales Rep Name
- Site Name

Drag fields between areas below:

Filters	Columns
Rows	Values

Defer Layout Update Update

Sum of Line Item ex: Item Name



	A	B	C
1	Drop Report Filter Fields Here		
2			
3	Sum of Line Sales Amount		
4	Item Name	Total	
5	1000-MC	122,100.00	
6	1500-PM	78,050.00	
7	2000-PT	87,300.00	
8	3000-UL	72,750.00	
9	ANAD	17.00	
10	ANBA-BL	255.00	
11	ANPI-BL	255.00	
12	CODR	0.00	
13	Custom Work	0.00	
14	DR-4-AL	42.50	
15	ELCO-12G	0.00	
16	Freight	0.00	
17	Grease	0.00	
18	Installation Labor	18,800.00	
19	Installation Repair	279.56	
20	POCO-AQ	33,125.00	
21	POCO-DB	31,750.00	
22	POCO-FG	21,150.00	
23	POCO-LB	32,125.00	
24	PU-1800	0.00	
25	PUBR	606.90	
26	RO-1/4in	25.50	
27	Grand Total	498,631.46	
28			
29			
30			
31			
32			
33			
34			
35			
36			
37			

Each Item is Automatically Subtotaled

PivotTable Fields

Choose fields to add to report:

Search

- Company Name
- Customer Name
- Date
- Item Name
- Line LOGS Amount
- Line Credits Applied On Document
- Line Item Description
- Line Sales Amount
- Line Sales Profit Margin Amount
- Line Sales Quantity
- Line Serial/Lot Number
- Ref #
- Sales Step Name
- Site Name

Drag fields between areas below:

Filter

Columns

Rows

Item Name

Values

Sum of Line Sales Amount

Defer Layout Update

Update

100%

4 Areas

Understanding the areas

Columns

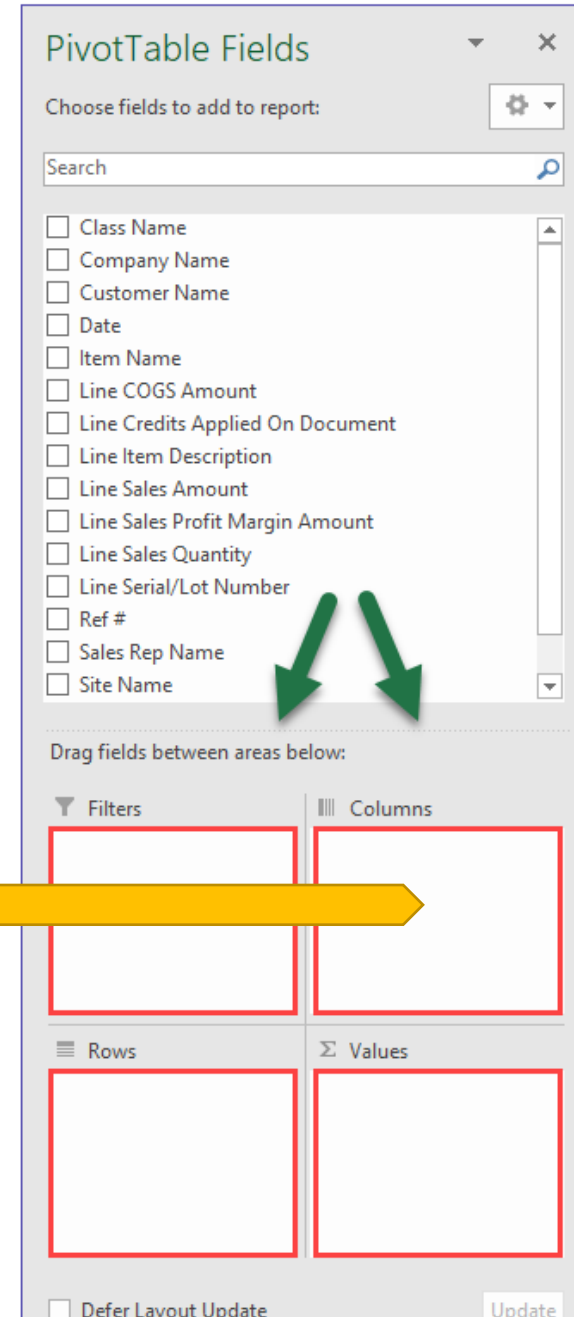
This is a powerful feature that lets you 'split' the values column into different buckets. e.g. class, sales rep, etc.

Filters

Rows

Values

Columns



PivotTable Fields

Choose fields to add to report:

Search

- Class Name
- Company Name
- Customer Name
- Date
- Item Name
- Line COGS Amount
- Line Credits Applied On Document
- Line Item Description
- Line Sales Amount
- Line Sales Profit Margin Amount
- Line Sales Quantity
- Line Serial/Lot Number
- Ref #
- Sales Rep Name
- Site Name

Drag fields between areas below:

Filters

Columns

Rows

Values

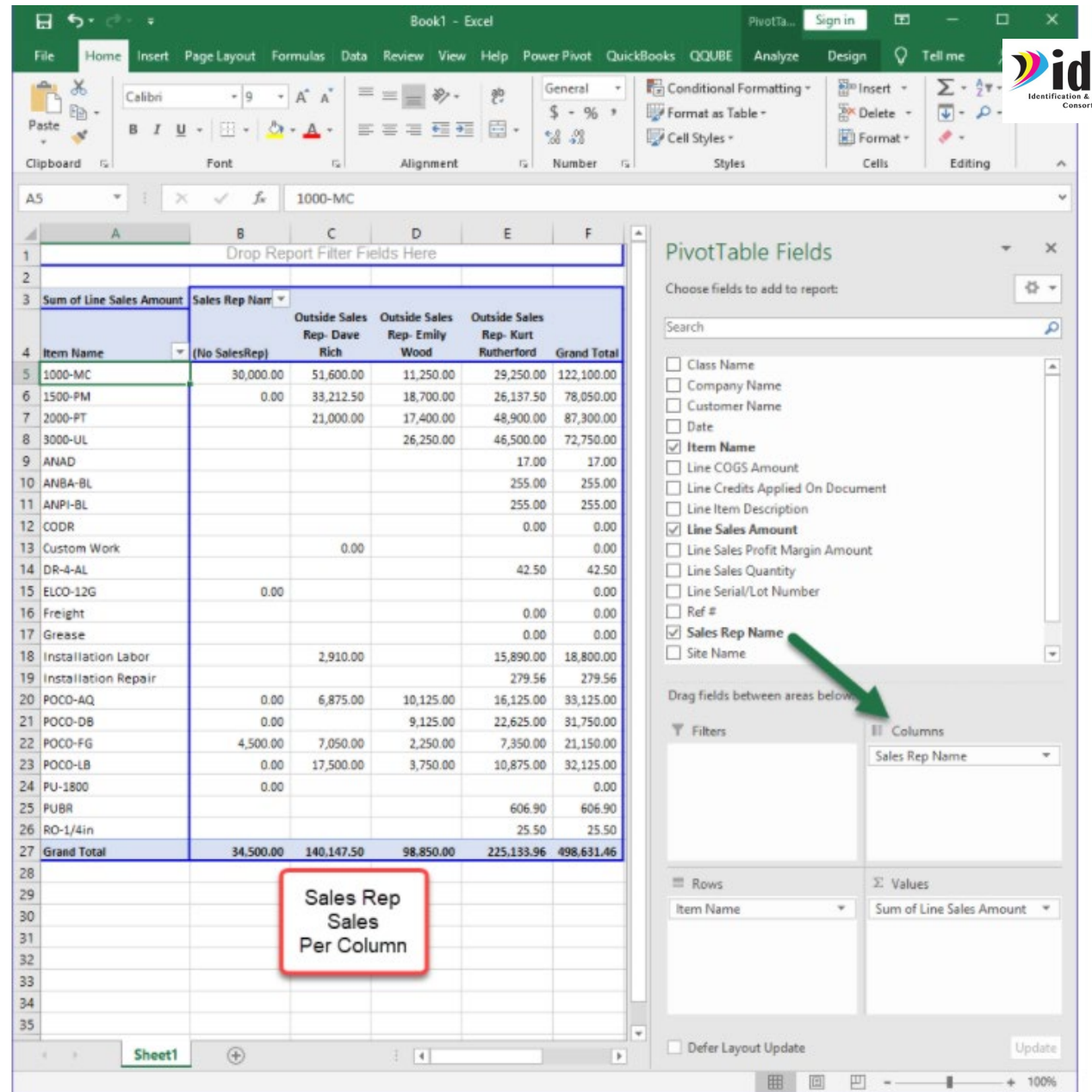
Defer Layout Update

Update

Adding Rep Name



Dave Rich



Book1 - Excel

File Home Insert Page Layout Formulas Data Review View Help Power Pivot QuickBooks QQUBE Analyze Design Tell me

Clipboard Font Alignment Number Styles Cells Editing

A5 1000-MC

Drop Report Filter Fields Here					
Sum of Line Sales Amount	Sales Rep Name	Outside Sales Rep- Dave Rich	Outside Sales Rep- Emily Wood	Outside Sales Rep- Kurt Rutherford	Grand Total
Item Name	(No SalesRep)				
1000-MC	30,000.00	51,600.00	11,250.00	29,250.00	122,100.00
1500-PM	0.00	33,212.50	18,700.00	26,137.50	78,050.00
2000-PT		21,000.00	17,400.00	48,900.00	87,300.00
3000-UL			26,250.00	46,500.00	72,750.00
ANAD				17.00	17.00
ANBA-BL				255.00	255.00
ANPI-BL				255.00	255.00
CODR				0.00	0.00
Custom Work		0.00			
DR-4-AL				42.50	42.50
ELCO-12G	0.00				0.00
Freight				0.00	0.00
Grease				0.00	0.00
Installation Labor		2,910.00		15,890.00	18,800.00
Installation Repair				279.56	279.56
POCD-AQ	0.00	6,875.00	10,125.00	16,125.00	33,125.00
POCD-DB	0.00		9,125.00	22,625.00	31,750.00
POCD-FG	4,500.00	7,050.00	2,250.00	7,350.00	21,150.00
POCD-LB	0.00	17,500.00	3,750.00	10,875.00	32,125.00
PU-1800	0.00				0.00
PUBR				606.90	606.90
RO-1/4in				25.50	25.50
Grand Total	34,500.00	140,147.50	98,850.00	225,133.96	498,631.46

Sales Rep Sales Per Column

PivotTable Fields

Choose fields to add to report:

Search

- Class Name
- Company Name
- Customer Name
- Date
- Item Name
- Line COGS Amount
- Line Credits Applied On Document
- Line Item Description
- Line Sales Amount
- Line Sales Profit Margin Amount
- Line Sales Quantity
- Line Serial/Lot Number
- Ref #
- Sales Rep Name
- Site Name

Drag fields between areas below:

Filters

Columns

Sales Rep Name

Rows

Item Name

Values

Sum of Line Sales Amount

Defer Layout Update Update

100%

The fields in the 'Choose fields to add to report' area can be dragged into the following four main Pivot Table areas:

4 Areas

Understanding the areas

Filters

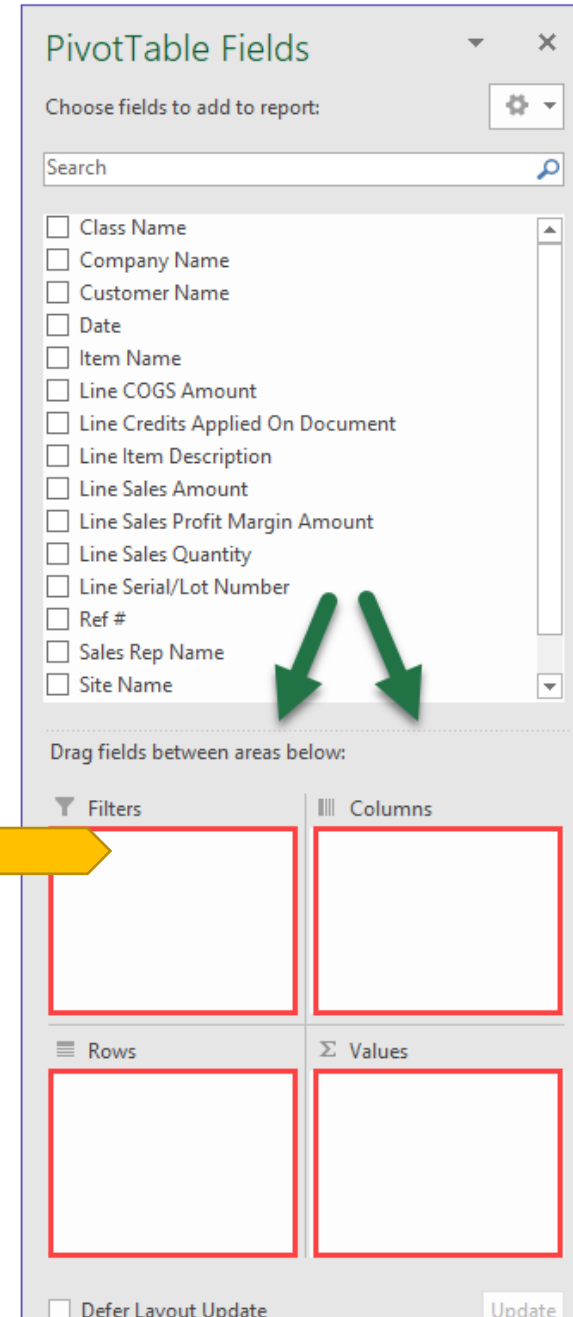
Allows you to filter the whole block of data.

Columns

Rows

Values

Filters



The screenshot shows the 'PivotTable Fields' task pane. At the top, there is a search bar and a list of fields with checkboxes. Two green arrows point from the 'Line Sales Amount' and 'Line Sales Profit Margin Amount' fields to the 'Filters' and 'Columns' areas respectively. Below the list, there are four red-outlined boxes representing the target areas: 'Filters' (top-left), 'Columns' (top-right), 'Rows' (bottom-left), and 'Values' (bottom-right). At the bottom, there are checkboxes for 'Defer Layout Update' and an 'Update' button.

Filtering

- Filtering Pivot Table Data in Excel
- Pick Filters
- Label Filters
- Value Filters

The screenshot displays an Excel PivotTable with the following data:

	Outside Sales Rep- Dave Rich	Outside Sales Rep- Emily Wood	Outside Sales Rep- Kurt Rutherford	
51,600.00	11,250.00	29,250.00		
33,212.50	18,700.00	26,137.50		
21,000.00	17,400.00	48,900.00		
	26,250.00	46,500.00		
		17.0		
		255.0		
		255.0		
		0.0		
0.00		42.5		
		0.0		
		0.0		
2,910.00		5,890.00		
		19.5		
0.00	6,875.00	10,125.00	16,125.00	
0.00		9,125.00	22,625.00	
4,500.00	7,050.00	2,250.00	7,350.00	
0.00	17,500.00	3,750.00	10,875.00	
0.00				
			606.9	
			25.5	
Grand Total	34,500.00	140,147.50	98,850.00	225,133.9

The PivotTable Fields task pane shows the following configuration:

- Filters:** Class Name
- Columns:** Sales Rep Name
- Rows:** Item Name
- Values:** Sum of Line Sales Amount

The 'Class Name' filter dropdown is currently set to '(All)'. The 'Select Multiple Items' checkbox is checked. The 'Class Name' field is highlighted in the task pane, and a green arrow points to the 'Filters' area.

Pick Filters Manually

Check/pick one or multiple items in the list

The screenshot shows the Microsoft Excel interface with a PivotTable. The PivotTable Fields task pane on the right shows the following fields selected for the report:

- Class Name
- Company Name
- Customer Name
- Date

The 'Customer Name' field is currently selected in the PivotTable, and its filter dropdown menu is open. The dropdown menu is highlighted with a red box and contains the following options:

- Clear Filter
- Equals...
- Does Not Equal...
- Begins With...
- Does Not Begin With...
- Ends With...
- Does Not End With...
- Contains...
- Does Not Contain...
- Greater Than...
- Greater Than Or Equal To...
- Less Than...
- Less Than Or Equal To...
- Between...
- Not Between...

The PivotTable data is as follows:

Class Name	Customer Name
(All)	(All)
Sum of Line Sales Amount	
Customer Name	Item Name
Sort A to Z	1000-MC
Sort Z to A	1500-PM
More Sort Options...	2000-PT
Clear Filter From "Customer Name"	3000-UL
	ELCO-120

Label Filters

Label is another name for the fields you put in the Row Quadrant of a Pivot Table

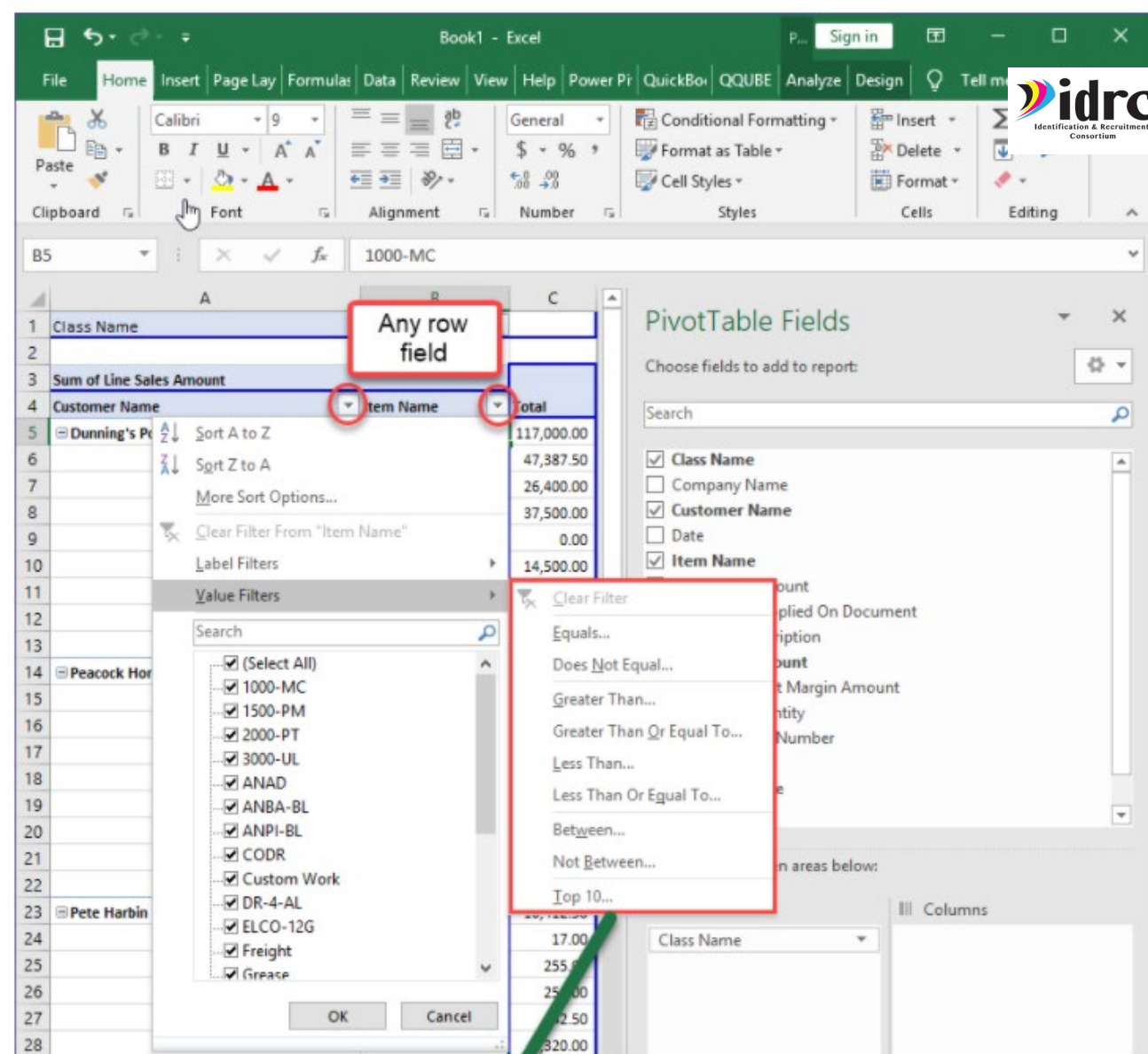
The screenshot shows an Excel spreadsheet with a PivotTable. The PivotTable is located in the range A3:C15. The PivotTable has 'Class Name' as a filter and 'Sum of Line Sales Amount' as a value field. The 'PivotTable Fields' task pane is open on the right, showing 'Class Name' in the Filters area. A dropdown menu for 'Class Name' is open, showing a list of labels with checkboxes. The labels are: (Select All), 1000-MC, 1500-PM, 2000-PT, 3000-UL, ANAD, ANBA-BL, ANPI-BL, CODR, Custom Work, DR-4-AL, ELCO-12G, Freight, and Grease. The values for each label are: 117,000.00, 47,387.50, 26,400.00, 37,500.00, 0.00, 14,500.00, 12,875.00, 11,250.00, 22,500.00, 3,612.50, 6,375.00, 0.00, 0.00, 0.00, 1,530.00, 0.00, 2,125.00, 2,550.00, 10,412.50, 17.00, 255.00, 255.00, 42.50, and 1,320.00.

Customer Name	Item Name	Total
		117,000.00
		47,387.50
		26,400.00
		37,500.00
		0.00
		14,500.00
		12,875.00
		11,250.00
		22,500.00
		3,612.50
		6,375.00
		0.00
		0.00
		0.00
		1,530.00
		0.00
		2,125.00
		2,550.00
		10,412.50
		17.00
		255.00
		255.00
		42.50
		1,320.00

Value Filters

In the Pivot Table you can filter out specific fields (e.g. customer, item, etc.) based upon a particular value, e.g. filter out Items that have a sales amount > 50.00.

NOTE: you create the filter using a drop down in a row field – NOT the actual number based column.



Remember our CSPR Data- Pivot Table

AutoSave Off | CSPR 2014-2015 FINAL - Saved | Search

File Home Insert Page Layout Formulas Data Review View Help Acrobat Table Design

PivotTable Recommended Table PivotTables

Tables Illustrations Add-ins Charts Sparklines

Table1

Stedest ID	State Id	Grade	County Name	Age Grade	...
TNO-28957	4016324	OOS	MACON COUNTY	560	N
TNO-26483	4317335	11	DEKALB COUNTY	210	N
TNO-27721	3938277	4	HAMILTON COUNTY	330	N
TNO-28011	3975306	OOS	ROBERTSON COUNTY	740	N
TNO-27983	3975306	OOS	HAMILTON COUNTY	330	N
TNO-28012	3975306	KG	MACON COUNTY	560	N
TNO-27793		OOS	SUMNER COUNTY	830	N
TNO-28684		OOS	RHEA COUNTY	720	N
TNO-29106		BT3	JEFFERSON COUNTY	450	N
TNO-28228	4344634	1	JEFFERSON COUNTY	450	Y
TNO-28227		OOS	ROBERTSON COUNTY	740	N
TNO-28571		OOS	#WASHINGTON COUNTY	900	N
TNO-29180		OOS	DEKALB COUNTY	210	N
TNO-28506	3570700	8	RHEA COUNTY	720	N
TNO-28341		3	WARREN COUNTY	890	Y
TNO-28339		1	WARREN COUNTY	890	Y
TNO-28340		5	WARREN COUNTY	890	Y
TNO-28981	3674735	5	VERTON COUNTY	670	Y
TNO-28982	3839389	4	VERTON COUNTY	670	Y
TNO-29107		OOS	RHEA COUNTY	720	N
TNO-29258	4537713	KG	HAMBLÉN COUNTY	320	Y
TNO-29257	4537712	3	HAMBLÉN COUNTY	320	Y
TNO-28827		OOS	JOHNSON COUNTY	460	N
TNO-28720		OOS	JOHNSON COUNTY	460	N
TNO-17183	3565838	8	HAMBLÉN COUNTY	320	Y
TNO-28727		OOS	JOHNSON COUNTY	460	N
TNO-28730		OOS	JOHNSON COUNTY	460	N
TNO-28584		OOS	SMITH COUNTY	800	N
TNO-28213		OOS	FRANKLIN COUNTY	260	N
TNO-29290		OOS	GREENE COUNTY	300	N
TNO-28944		OOS	RHEA COUNTY	720	N
TNO-27573		OOS	GREENE COUNTY	300	N
TNO-29293		OOS	GREENE COUNTY	300	N
TNO-27372	4193336	5	KNOX COUNTY	470	N
TNO-27733	4315342	2	JOHNSON COUNTY	460	Y
TNO-26864	3624397	4	RHEA COUNTY	721	Y
TNO-27497		OOS	HAMBLÉN COUNTY	320	N

Create PivotTable

Choose the data that you want to analyze

Select a table or range

Table/Range:

Use an external data source

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

Eligible Students- Columns- Grade- Rows- County

Row Labels	1	2	3	4	5	6	7	8	9	10	11	12	3T05NOTK	KG	OOS	Grand Total
BEDFORD COUNTY				1	1			2	3	1	1	1		1	1	12
BLED SOE COUNTY	9	9	7	9	7	5	6	6		6	1	2		18	6	120
BRADLEY COUNTY	1	3	1	1		1	1	2		2				2		14
CARTER COUNTY			1	1												2
CHEATHAM COUNTY	1					1									11	13
CLAY COUNTY										1						1
COCKE COUNTY	3	2	2	2	2	2	2	2	3	1	1			16	6	50
COFFEE COUNTY											1					1
CROCKETT COUNTY	2	1	1				1	1		1	2	2			1	12
CUMBERLAND COUNTY	2	1	1	1			1	1	1					4	2	17
DAVIDSON COUNTY	2	3	1	2	3	4	1	1	1					7	2	27
DEKALB COUNTY	2								1	2	1			2	1	11
DICKSON COUNTY	1		1				1									17
FRANKLIN COUNTY	4	2	2	1	1	3	1	1	2			2		2	1	12
GRAINGER COUNTY	5	4	2	1	3	4			3	1	1			9	1	9
GREENE COUNTY	6	5	2	4	4	4	1	4	2	2	1			8	3	25
HAMBLEN COUNTY	19	13	13	11	12	12	5	9	9	4	4	2		32	15	52
HAMILTON COUNTY	1	3	3	5	3	2	3		3			1		5	3	1
HAWKINS COUNTY				1		1		1						2	1	1
HAYWOOD COUNTY				1		1										2
HENRY COUNTY								1								7
HUMPHREYS COUNTY	1													1	1	3
JEFFERSON COUNTY	5	3	4	4		4		1	5		1	3		13	3	5
JOHNSON COUNTY	5	2	5	4	1	1	1	1						8	3	27
KNOX COUNTY	1		1		1		1	1		1				1	1	8
LAUDERDALE COUNTY				2		2			2	1	1				3	11
LINCOLN COUNTY									1							1
LOUDON COUNTY				1	1		1									4
MACON COUNTY	11	3	5	6	11	2	1	2	3	4	2	1		19	8	117
MARSHALL COUNTY	1	1		1		1	2							2	1	2
MAURY COUNTY	1	2		1					1					1		6
MONROE COUNTY														1	3	4
MONTGOMERY COUNTY	2	3	1			1	1	2	2	2	1			2	33	50
OBION COUNTY		1		1					1	1		1		1	1	7

PivotTable Fields

Choose fields to add to report: ⚙️

Search

- Last Name
- First Name
- Birth Date
- Age
- Sex
- Race
- Student ID
- State Id
- Grade
- Countenrollment
- County Name

Drag fields between areas below:

Filters

Countenrollment ▾

Age Grade ▾

Columns

Grade ▾

Rows

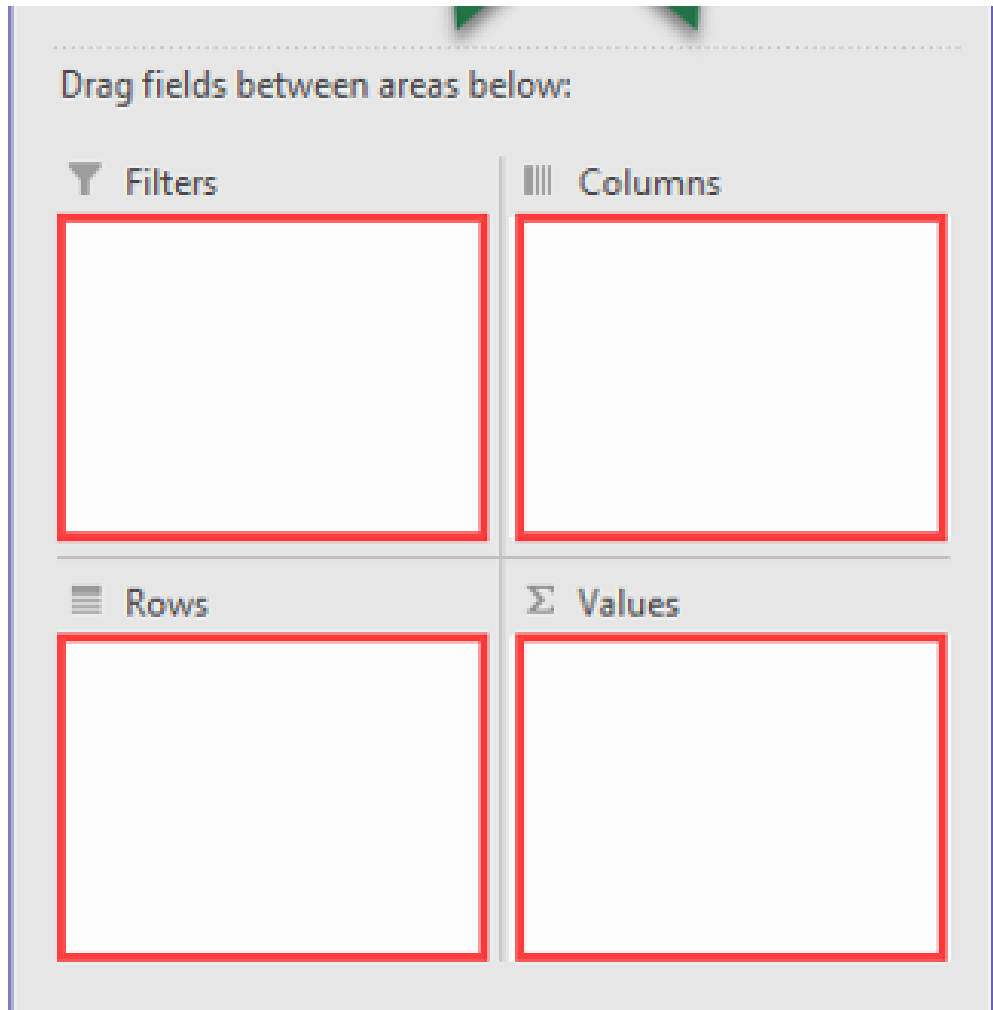
County Name ▾

Values

Count of Age ▾

What Would I need?

- If I wanted to create a pivot table that shows **which students were served during the Performance Period** what Filters, Columns, Rows, and Values would I need?



Served Performance Period

Count of Age	1	2	3	4	5	6	7	8	9	10	11	12	3TO5NOTK	KG	OOS	Grand Total
BEDFORD COUNTY					1			1	3	1	1	1		1	1	10
BLEDSON COUNTY	9	8	7	9	7	5	4	6		5	1	2		17	6	23
BRADLEY COUNTY	1	2		1		1	1	2		2				2		12
CARTER COUNTY			1	1												2
CHEATHAM COUNTY	1					1									4	6
CLAY COUNTY									1							1
COCKE COUNTY	1	2	1	1	2	2	2	2	3	1	1			7	3	33
COFFEE COUNTY										1						1
CUMBERLAND COUNTY	2	1	1	1			1	1	1					2	2	14
DAVIDSON COUNTY	2	3	1	2	3	1	1		1					7	2	23
DEKALB COUNTY	2								1	2	1			2	1	11
DICKSON COUNTY	1		1				1								10	13
FRANKLIN COUNTY	3	2	1	1	1	3		1	2		2			1	1	27
GRAINGER COUNTY	5	4	2	1	3	4			3		1			9	1	39
GREENE COUNTY	6	4	2	3	3	2	1	3		1	1			6	1	52
HAMBLEN COUNTY	16	12	10	9	11	11	5	8	8	4	4	2		22	14	35
HAMILTON COUNTY	1	3	3	5	3	2	3		3			1		4	3	31
HAWKINS COUNTY				1										1	1	3
HUMPHREYS COUNTY	1														1	3
JEFFERSON COUNTY	5	3	4	4		4		1	5			3		12	3	49
JOHNSON COUNTY	5	2	5	4	1	1	1	1						8	3	26
KNOX COUNTY			1				1	1		1				1		5
LINCOLN COUNTY									1							1
LOUDON COUNTY																4
MACON COUNTY	11	3	5	6	10	2	1	1	2	2	1	1		18	8	78
MARSHALL COUNTY	1	1		1		1	2							2	1	11
MAURY COUNTY	1	2		1										1		5
MONROE COUNTY														1		1
MONTGOMERY COUNTY	2	3	1			1	1	2	2	2	1			2	29	46
OVERTON COUNTY				1	1	1										3
PUTNAM COUNTY	3	1	4	6	2	3		5						5	5	34
RHEA COUNTY	18	18	11	20	9	15	12	11	13	15	9	3		47	13	76
ROBERTSON COUNTY	2	3	1		1		1	1	1	1				1	2	46
RUTHERFORD COUNTY	1	1			1	2		1	2					1		9

PivotTable Fields

Choose fields to add to report: ⚙️

Search

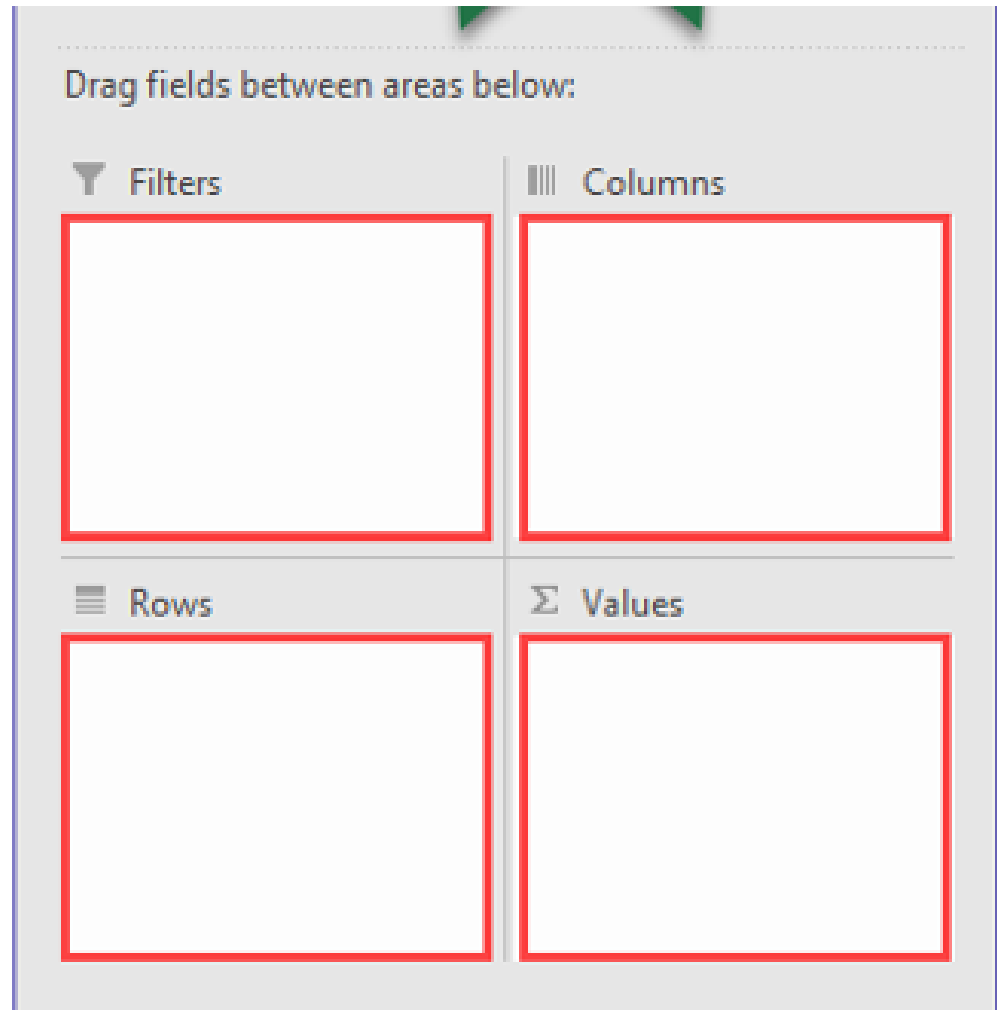
- Last Name
- First Name
- Birth Date
- Age
- Sex
- Race
- Student ID
- State Id
- Grade
- Countenrollment
- County Name

Drag fields between areas below:

Filters	Columns
Countenrollment ▼	Grade ▼
Age Grade ▼	
Served Performance ... ▼	
Rows	Values
County Name ▼	Count of Age ▼

What Would I need?

- If I wanted to create a pivot table that shows which students received **instructional services during the performance period** what Filters, Columns, Rows, and Values would I need?



Performance Period- Instructional Services

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
1	Countenrollment	Y																										
2	Age Grade	(Multiple Items)																										
3	Instructional PP 2.3.5.3	Y																										
4																												
5	Count of Age	Column Labels																										
6	Row Labels		1	2	3	4	5	6	7	8	9	10	11	12	3T05NOTK	KG	OOS	Grand Total										
7	BEDFORD COUNTY						1				3	1	1				1	7										
8	BLEDSON COUNTY		7	7	6	8	6	2	4	3		1	1	2		3	4	54										
9	BRADLEY COUNTY												2					2										
10	CARTER COUNTY				1	1												2										
11	CLAY COUNTY										1							1										
12	COCKE COUNTY		1	2	1	1	2	2	2	2	3	1	1			5	3	26										
13	CUMBERLAND COUNTY		2	1	1	1			1		1					1	2	10										
14	DEKALB COUNTY											1	2					3										
15	FRANKLIN COUNTY		2		1	1		1	2			1		1			1	4										
16	GRAINER COUNTY		4	3	2		3	2			1		1			5	1	1	23									
17	GREENE COUNTY		1	1		2		1										5										
18	HAMBLEN COUNTY		13	10	8	9	10	10	4	5	6	3	3	1		9	5	7	103									
19	HAMILTON COUNTY		1	3	2	4	2	2	2			1				2	3	22										
20	HAWKINS COUNTY															1		1										
21	JEFFERSON COUNTY		4	1	3	3		3			1			1		5	2	2	25									
22	JOHNSON COUNTY		3	1	5	4	1	1	1	1						4	2	23										
23	KNOX COUNTY										1		1					2										
24	MACON COUNTY		9	2	3	5	8	1	1	1	1					10	7	48										
25	MARSHALL COUNTY		1	1		1		1	2							2	1	2	11									
26	MAURY COUNTY		1	2		1										1		5										
27	MONTGOMERY COUNTY										2	1						3										
28	PUTNAM COUNTY		3	1	1	5	1	3		2						4		20										
29	RHEA COUNTY		14	16	8	16	8	9	7	6	7	3	2	3		13	6	3	121									
30	ROBERTSON COUNTY											1						1										
31	RUTHERFORD COUNTY		1					2								1		4										
32	SEQUATCHIE COUNTY		1	1												1		3										
33	SHELBY COUNTY		1		1		1											3										
34	UNICOI COUNTY		1	2			3	2	3	3	3	4	5			1	5	32										
35	WARREN COUNTY			2	2	2	1	2		1	1	1				2	2	16										
36	WASHINGTON COUNTY		1	1				1	1	1	1					1	1	8										
37	WILLIAMSON COUNTY									1	1	1						3										
38	WILSON COUNTY										1		1					2										
39	Grand Total		71	57	45	64	47	42	32	27	35	21	17	9		70	41	25	603									

PivotTable Fields

Choose fields to add to report:

Search

- Last Name
- First Name
- Birth Date
- Age
- Sex
- Race
- Student ID
- State Id
- Grade
- Countenrollment
- County Name

Drag fields between areas below:

Filters

- Countenrollment
- Age Grade
- Instructional PP 2.3.5.3

Columns

- Grade

Rows

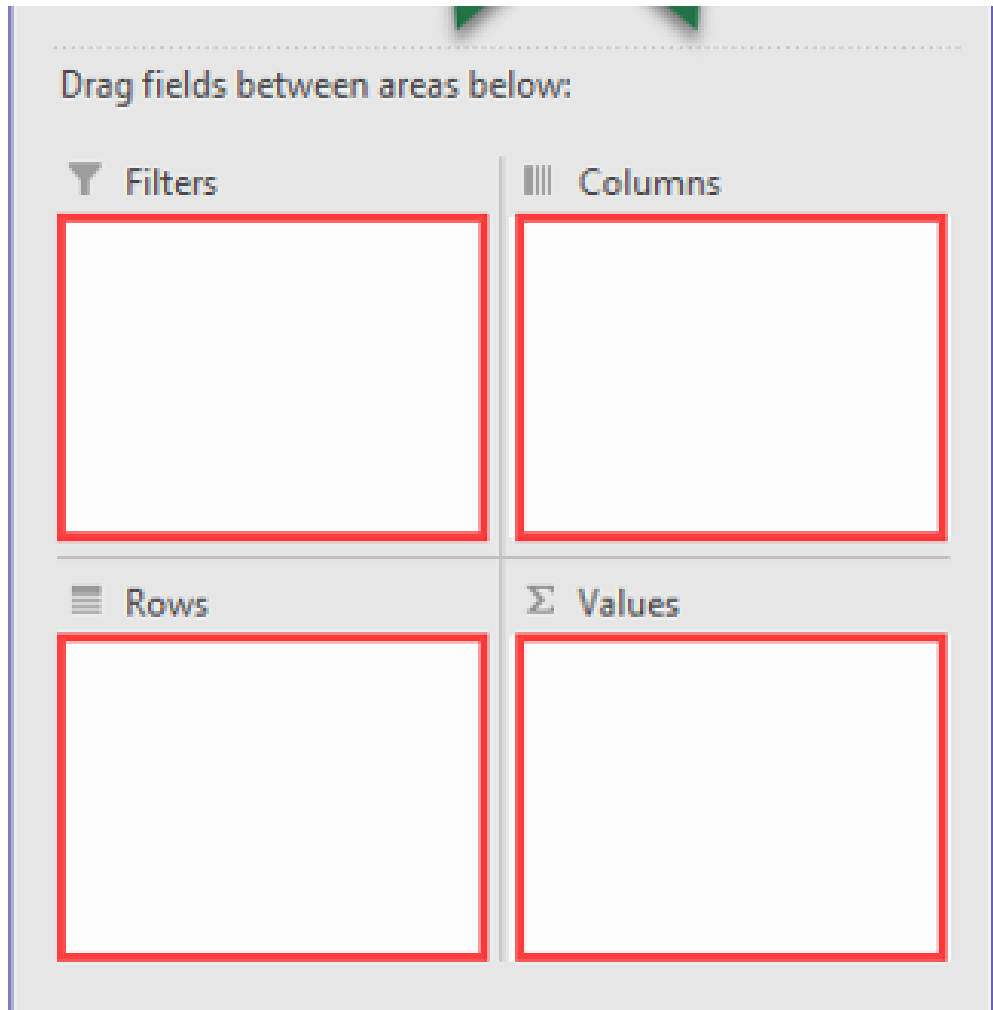
- County Name

Values

- Count of Age

What Would I need?

- If I wanted to create a pivot table that shows which students received **summer services** what Filters, Columns, Rows, and Values would I need?



Served in the Summer

Count of Age	Column Labels												3T	O5	NOTK	KG	OOS	Grand Total	
Row Labels	1	2	3	4	5	6	7	8	9	10	11	12							
BEDFORD COUNTY					1			1	3	1	1	1				1	1	10	
BLEDSON COUNTY		7	6	7	8	7	5	4	6		4	1	2			9	5	18	89
BRADLEY COUNTY		1	2		1		1		1		2					1			9
CLAY COUNTY										1									1
COFFEE COUNTY											1								1
CUMBERLAND COUNTY		1	1	1	1					1						2	1	2	10
DEKALB COUNTY										1	2	1						1	5
FRANKLIN COUNTY		2		1	1		1	2		1	1		2			1	8		20
GRAINGER COUNTY		5	2		1	2	4			3		1				5	3		26
GREENE COUNTY		4	3	2	1	3	1	1	3		1	1				4	1	12	37
HAMBLETON COUNTY		12	11	9	9	9	11	5	8	7	4	4	2			14	12	22	139
HAMILTON COUNTY		1	2	1	4	3	2	1		2						3	1		21
JEFFERSON COUNTY		4	3	3	4		3		1	4			3			9	2	4	40
KNOX COUNTY				1				1	1		1								4
LINCOLN COUNTY											1								1
MACON COUNTY		9	3	4	5	7	2	1	1	1	2	1	1			10	7	25	79
MARSHALL COUNTY		1	1		1		1	2								2	1	2	11
MAURY COUNTY		1	2		1											1			5
MONROE COUNTY																1			1
MONTGOMERY COUNTY										2	1							3	6
PUTNAM COUNTY		3		1	4	1	1		2							2			4
RHEA COUNTY		16	18	10	18	7	11	10	8	13	14	9	3			41	10	35	223
ROBERTSON COUNTY											1							5	6
RUTHERFORD COUNTY		1		1			1	2			2					1			8
SEQUATCHIE COUNTY		3	1													3	1		8
UNICOI COUNTY			1			3	2	1	3	2	3	3				2		4	24
WARREN COUNTY			1	2	2	1	3		1	1	1	1	1			2	2		17
WASHINGTON COUNTY		1	1	1		1			3	1		1				2	1	16	28
WILLIAMSON COUNTY										1		1	1						3
WILSON COUNTY						1		1					1			1			5
Grand Total		72	58	44	61	46	49	31	41	45	40	25	17			114	47	165	855

PivotTable Fields

Choose fields to add to report:

Search

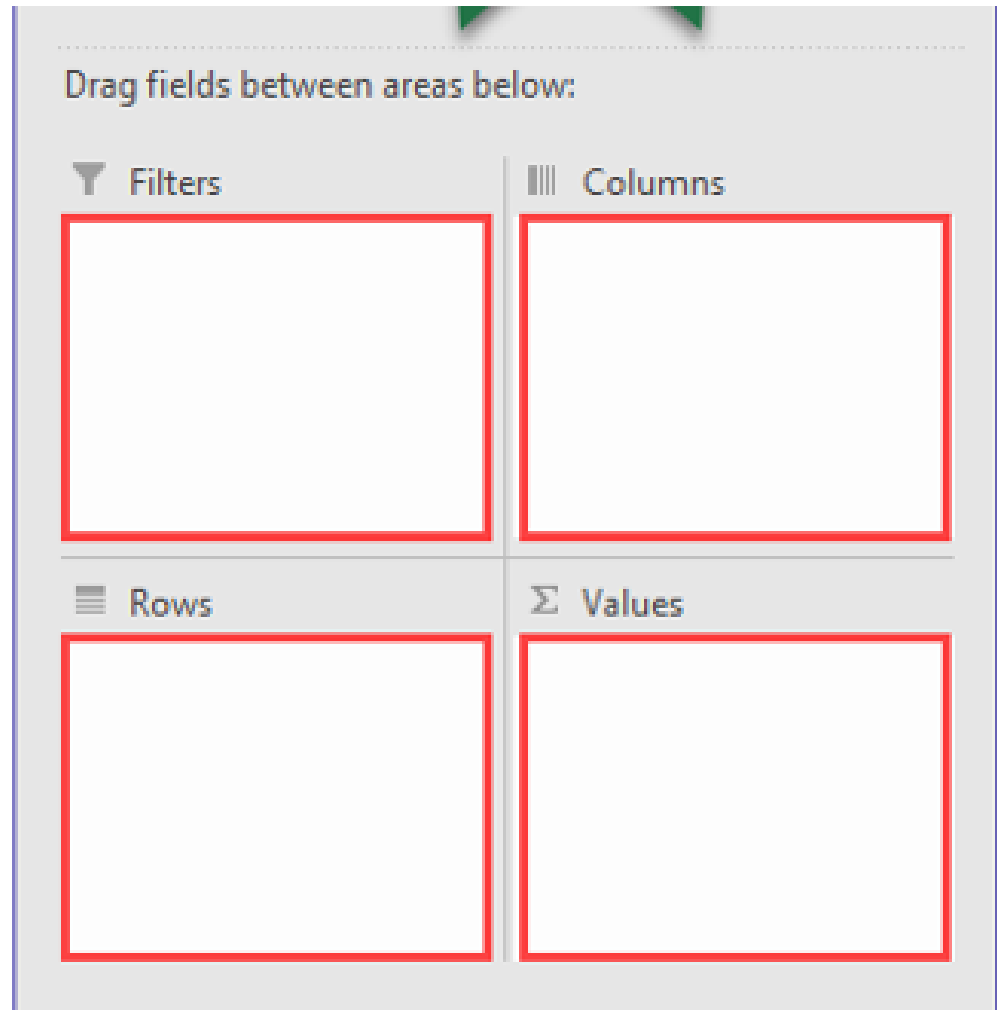
- Last Name
- First Name
- Birth Date
- Age
- Sex
- Race
- Student ID
- State Id
- Grade
- Countenrollment
- County Name

Drag fields between areas below:

Filters	Columns
Countenrollment	Grade
Age Grade	
Served Summer 2.3.1.2	
Rows	Values
County Name	Count of Age

What Would I need?

- If I wanted to create a pivot table that shows **how many students are priority for service** what Filters, Columns, Rows, and Values would I need?



Priority for Service

PivotTable Active Field Group Filter Data Actions Calculations Tools Show

A5 Count of Age

Count of Age	Column Labels	1	2	3	4	5	6	7	8	9	10	11	12	KG	Grand Total
BEDFORD COUNTY						1					3	1	1		6
BLED SOE COUNTY		8	9	6	9	5	4	5	6		6	1	2	3	64
BRADLEY COUNTY		1						1	1						3
CHEATHAM COUNTY		1				1									2
CLAY COUNTY										1					1
COCKE COUNTY		2	1	1	1	1	1	2	2	3	1	1		3	19
COFFEE COUNTY										1					1
CROCKETT COUNTY				1							2	1			4
CUMBERLAND COUNTY		2	1	1			1		1					1	7
DAVIDSON COUNTY		2	1	1		2	1			1				1	9
DEKALB COUNTY		2								1	1			1	5
FRANKLIN COUNTY		1	1	1	1		1	1	1			1			7
GRAINGER COUNTY		2	3		2	1				2					10
GREENE COUNTY		4	2	2	2	2	2		3	2	1	1		2	23
HAMBLEN COUNTY		10	10	10	4	9	8	4	4	4	2	1	1	7	74
HAMILTON COUNTY		2	2	1	1	1	2		3				1		13
HAWKINS COUNTY							1		1						2
HAYWOOD COUNTY				1		1									2
HUMPHREYS COUNTY		1												1	2
JEFFERSON COUNTY		4	3	2	2				3			3	2		19
JOHNSON COUNTY		1	1	1	2				1						6
KNOX COUNTY		1												1	2
LOUDON COUNTY						1		1							2
MACON COUNTY		6	1	2	3	3	1	1		2	2	1	1	3	26
MARSHALL COUNTY		1	1	1	1	1	2							1	7
MAURY COUNTY		1	2		1										4
MONTGOMERY COUNTY				1			1	1		2	1	1			7
OBION COUNTY				1						1	1				3
OVERTON COUNTY					1	1	1								3
PUTNAM COUNTY			1	3	4	1	1		3						13
RHEA COUNTY		16	17	9	15	8	14	8	10	11	15	10	3	6	142
ROBERTSON COUNTY		1		2	1										4
RUTHERFORD COUNTY						1	1		1	2				1	7
SEQUIATCH COUNTY		4	2	1			1	3							13

PivotTable Fields

Choose fields to add to report:

Search

- Last Name
- First Name
- Birth Date
- Age
- Sex
- Race
- Student ID
- State Id
- Grade
- Countenrollment
- County Name

Drag fields between areas below:

Filters

- Countenrollment
- Priority1 2.3.2.1
- Age Grade

Columns

- Grade

Rows

- County Name

Values

- Count of Age

Defer Layout Update Update

Sheet1 2014-2015 Eligible Students Served PP Instructional PP Served Summer PFS PFS Served

Excel Hacks and Shortcuts

- <https://www.goskills.com/Excel/Resources/Excel-hacks>
 - <https://www.excel-easy.com/data-analysis/pivot-tables.html>
 - <https://www.howtogeek.com/361582/all-the-best-microsoft-excel-keyboard-shortcuts/>
 - <https://www.techonthenet.com/excel/formulas/vlookup.php>
- **Shift+F11**: Insert a new worksheet
 - **Ctrl+Z**: Undo an action
 - **Ctrl+Y**: Redo an action
 - **Ctrl+F2**: Switch to Print Preview
 - **F1**: Open the Help pane
 - **Alt+Q**: Go to the “Tell me what you want to do” box
 - **F7**: Check spelling
 - **F9**: Calculate all worksheets in all open workbooks
 - **Shift+F9**: Calculate active worksheets
 - **Alt or F10**: Turn key tips on or off
 - **Ctrl+F1**: Show or hide the ribbon
 - **Ctrl+Shift+U**: Expand or collapse the formula bar
 - **Ctrl+F9**: Minimize the workbook window
 - **F11**: Create a bar chart based on selected data (on a separate sheet)
 - **Alt+F1**: Create an embedded bar chart based on select data (same sheet)
 - **Ctrl+F**: Search in a spreadsheet, or use Find and Replace
 - **Alt+F**: Open the File tab menu
-

Excel Hacks and Shortcuts- VLookUp

totn How to use the VLOOKUP function in Excel HOW-TO TUTORIAL Watch later Share

F1 =VLOOKUP(10251,A1:B6,2,FALSE)

	A	B	C	D	E	F	G	H	I
1	Order ID	Product	Unit Price	Quantity		=VLOOKUP(10251,A1:B6,2,FALSE)			
2	10247	Apples	\$14.00	12					
3	10249	Oranges	\$9.80	10					
4	10250	Bananas	\$34.80	5					
5	10251	Pears	\$18.60	9					
6	10252	Grapes	\$42.30	40					
7									
8									

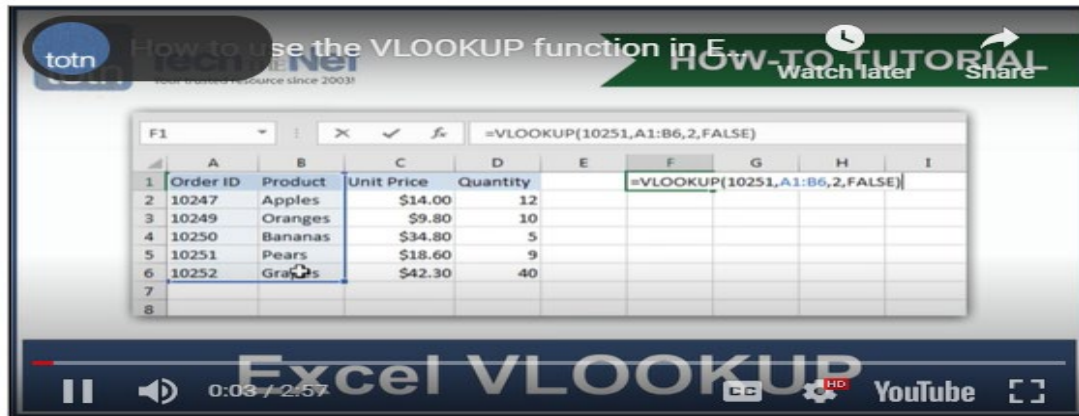
Excel VLOOKUP

0:03 / 2:57 YouTube



- <https://www.techonthenet.com/excel/formulas/vlookup.php>

Excel Hacks and Shortcuts- VLookUp



Syntax

The syntax for the VLOOKUP function in Microsoft Excel is:
 VLOOKUP(value, table, index_number, [approximate_match])

Parameters or Arguments

Value-The value to search for in the first column of the *table*.

Table-Two or more columns of data that is sorted in ascending order.

index_number-The column number in *table* from which the matching value must be returned. The first column is 1.

approximate_match-Optional. Enter FALSE to find an exact match. Enter TRUE to find an approximate match. If this parameter is omitted, TRUE is the default.

- <https://www.techonthenet.com/excel/formulas/vlookup.php>
- <https://www.youtube.com/watch?v=aJXgqNhRWMM> One more video

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0:02 / 3:28



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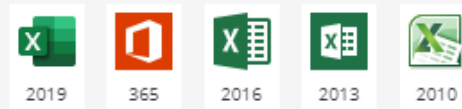
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Evaluation

QR Code/Link to Form 2: Training Evaluation



Electronic Survey Version-

<https://www.surveymonkey.com/r/IDRCStaffTrainingEval20-21>

Training Name: Advanced Excel

Contact Info

Jessica Castañeda

IDRC Director

931-668-4129- office

931-273-4050- cell

jcastanedaidr@gmail.com

www.idrconsortium.org



thank you _____