

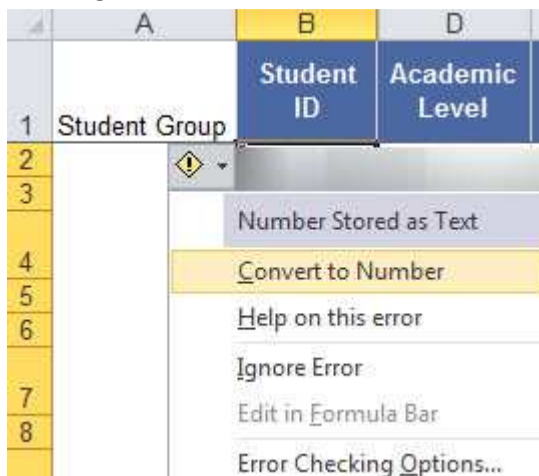
How to Filter by Student Group Using VLOOKUP in Excel

This example shows how to narrow down a list of students exported from any general myInsights or Pyramid dashboard report by one Student Group using the VLOOKUP function in Excel.

Identify the Student Group population

1. Identify your Student Group population using your favorite method, i.e. Pyramid or PeopleSoft, and save the list in an Excel worksheet.
2. Convert the Student ID numbers from text to numeric format, if needed.

Tip: Select the ID numbers without including the heading. When the column of Student IDs is highlighted, there will be a diamond shaped icon with an exclamation point at the top of the column. Click the arrow next to the icon to see the option to Convert to Number, as shown in this diagram:



3. Sort the workbook in ascending order, smallest to largest.

Run the Main Report

1. Run the desired report using the appropriate parameters.
2. Export to Excel and save to your desired location.
3. Sort the workbook in ascending order, smallest to largest.

Prepare the Workbook

1. Insert a blank column in front the first column of the main report, naming it **Student Group**.
2. Highlight the Student ID numbers, deselecting the header row.

Tip: Select the first cell containing the Student ID. Press Shift + Ctrl, then the down arrow on your keyboard. The entire column from your starting cell will be highlighted. Scroll back up to the top of the workbook to continue with the next step.

3. Convert the Student ID numbers from text to numeric format as shown previously, if needed.
4. Sort the entire workbook by Student ID, in ascending order, smallest to largest.
5. Copy the list of Student ID numbers from the Student Group population into the second, blank, worksheet.

Note: Both list of Student IDs should now be converted to numeric format and sorted ascending

6. Name column B "Student_Group".
7. Enter the appropriate Student Group code, i.e. CSSP, into the first cell of Column B, place your cursor over the lower right corner of the cell until the cursor becomes a bold black plus mark (+), then double click your mouse so that the formula is copied down to the last row with data in it.

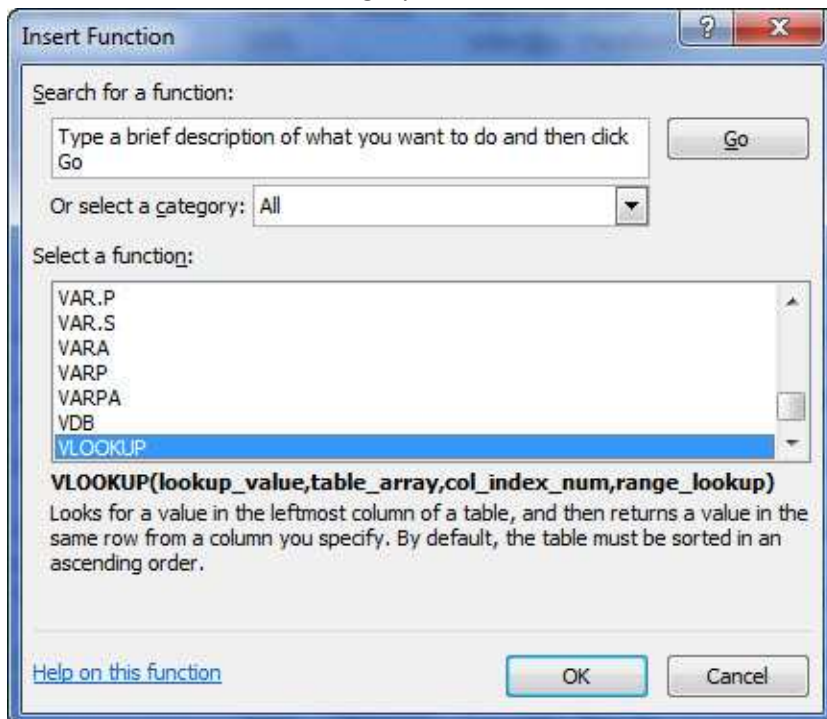
Use the VLOOKUP Function to Add the Student Group to the Workbook

1. Place your cursor into the cell containing the first Student ID.
2. Click on Formulas in the ribbon, then select Insert Function and choose the VLOOKUP option from the list.

Tip: Use the shortcut Function (fx) button in place of the Insert Function option in the ribbon.

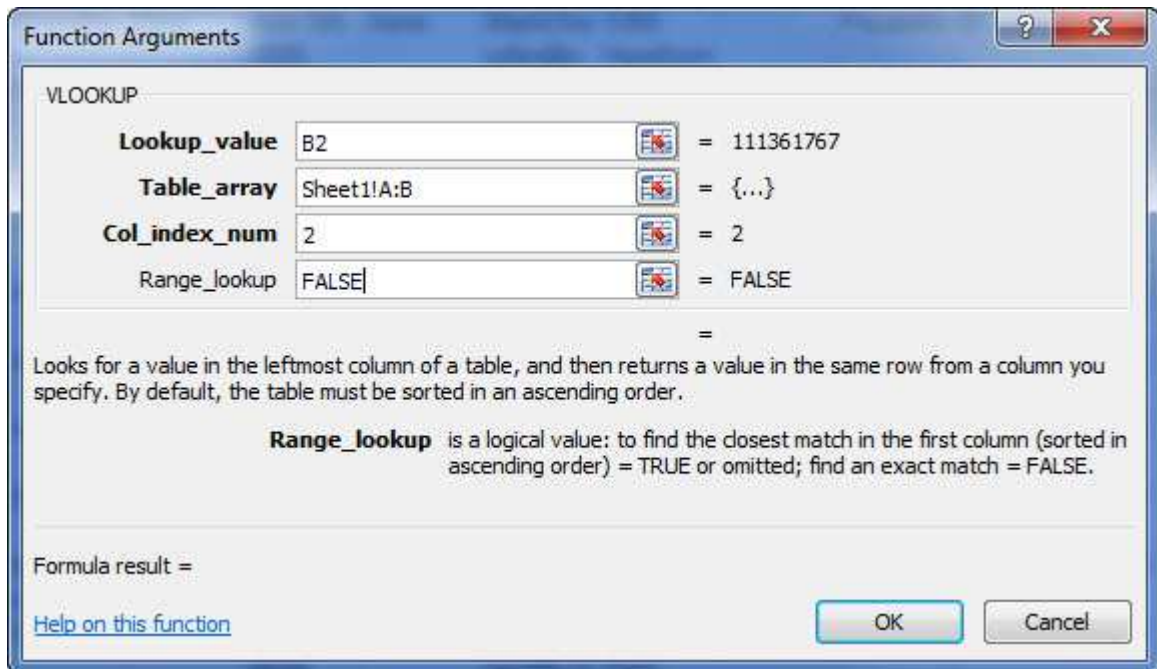


3. Select **All** in the Function category, and scroll down to find VLOOKUP in the Function name.



10. If necessary, click in the **Col_index_num** box to place your cursor in it.
11. Enter the number 2, which corresponds to Column B in the second worksheet, in the **Col_index_num** cell. See screenshot from Step 9 for clarification, if needed.
12. Enter "false" in the **Range_lookup** cell.

Note: To force the VLOOKUP to return only accurate information, enter **FALSE** into the **Range_lookup** box. (If a value of TRUE is used, the lookup returns the closest match and is not applicable for this situation.)



13. Click OK to execute the VLOOKUP function.
14. Place your cursor over the lower right corner of the cell until the cursor becomes a bold black plus mark (+).
15. Double click your mouse so that the formula is copied down to the last row with data in it.

Filter the report

1. Now that the Student Group information has been added to the main report, add a filter to the entire workbook from the Data tab in the ribbon.
2. Filter by the Student Group listed in Column A to find those students from the student group who meet the criteria of the main report.

