Tip Sheet No.82

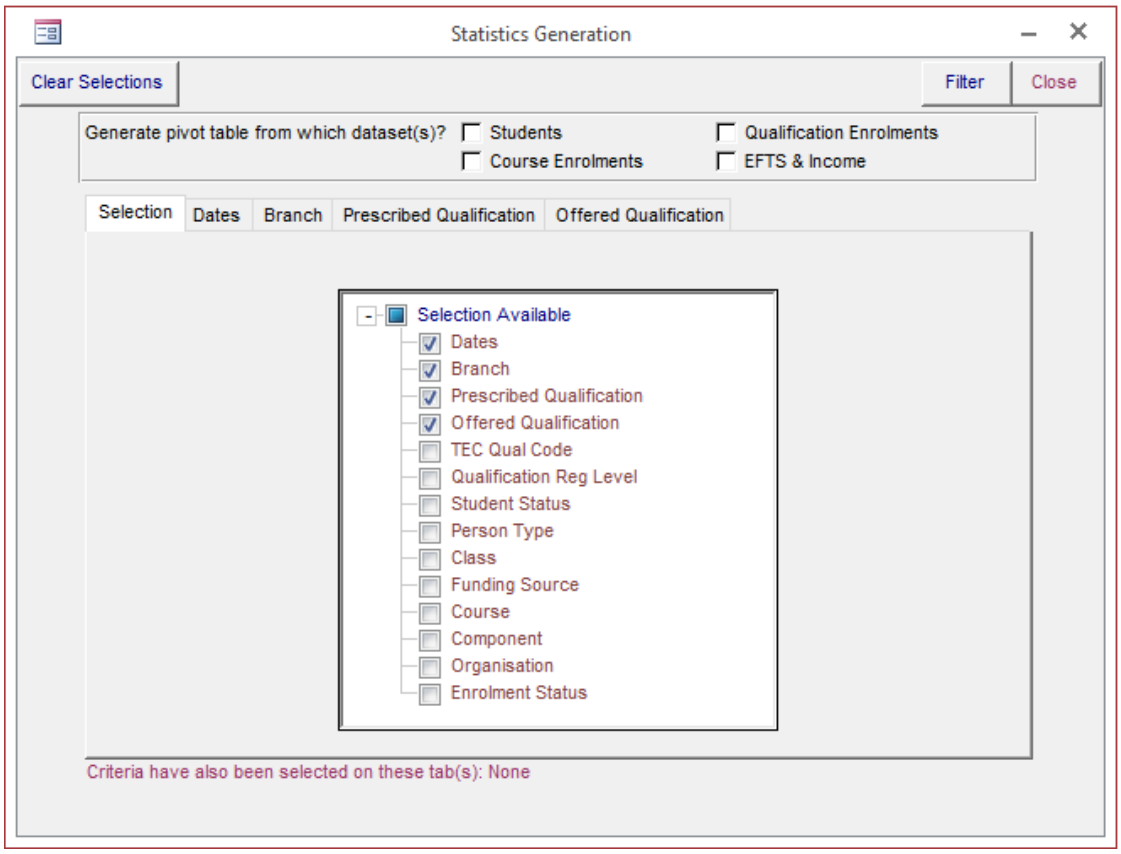
1. Extract Take2 Data to Excel

1.1 Generate Statistics

The statistics function in Take2 is often the most comprehensive option for extracting information to Excel. The information extracted to Excel includes the majority of fields associated with the dataset(s) chosen.

Find the button in the Take2 Admin Module, under System Management, Statistics.

Take2 SQL Edition displays the Statistics button under System Management, Database Maintenance instead.



1.1.1 Datasets

Different fields pertain to different datasets, and all but the Students dataset are mutually exclusive, meaning they cannot be picked concurrently. The Students dataset will allow you to extract student fields to Excel. The other datasets are already linked to a student ID so ticking Students does not exclude any other dataset from being extracted and will not modify your data in any way, but rather expand on the fields available. If you wanted to know course completions by ethnicity or gender for example you would tick Students as well as Course Enrolments. It is also worth noting that the

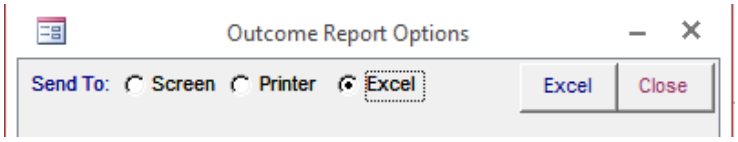
datasets might be mutually exclusive, but still refer to one another. For example every course enrolment contain a qualification code, and EFTS & Income contains course codes.

1.1.2 Filter

The data you extract can either be filtered in Take2 using the filter options available or dynamically filtered in Excel. Filtering out information in Take2 directly dictates what information will be extracted out to Excel, whereas filtering in Excel will leave the information there, but allow you to filter it out or back in as you need. In some scenarios you will want to use Take2's filter rather than Excel's because of its accessibility. For example, if you were only interested in a specific SDR year it would be easier to input it into Take2's Date filter than to pick and choose dates using Excel.

1.2 Send Report to Excel

Many reports have the ability to print straight into an Excel spreadsheet. This can be helpful when you want to manipulate the data further or inspect it using the tools already available in Excel. This function is often found in the form of a radio button alongside the Screen and Printer options.



Some reports will only extract to Excel, such as the Outcome Summary report available from the Exports & Reports menu.

1.3 Produce Audit Data

Some reports will allow the option of producing Audit Data. One example of this is the Performance Indicators report found under Exports & Reports. This Audit Data produces and Excel workbook with several sheets, each containing the information from which the final report is generated.

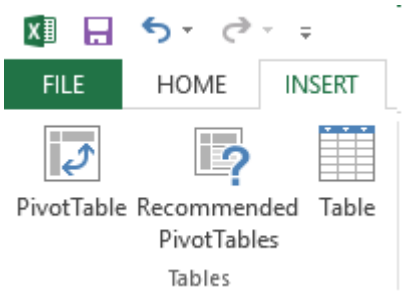
2. Create and Manipulate PivotTables

2.1 Migrate Data (Optional)

To utilize the most up to date features of Excel it is recommended that you create a new workbook in Excel and migrate the data over. This can be done by copying and pasting the data from one worksheet to the other. Use CTRL+A to select all your data and CTRL+C to copy it. Highlight a cell in the new workbook and use CTRL+V to paste all the records.

2.2 Insert PivotTable

Highlight an occupied cell and click on the Insert tab in the top ribbon. The PivotTable button should be visible, as below.



Click PivotTable and OK on the Prompt that comes up. The prompt is only asking what data you want to use (by default everything on the page you selected it from) and where you want to insert the PivotTable (by default a new worksheet). After clicking OK on the prompt your empty PivotTable will be created.

2.3 Fields and Areas

Clicking anywhere on the PivotTable will show you on the right side of Excel a list of the fields available, along with the areas they can be displayed in. There are four areas in total, FILTERS, COLUMN, ROWS and VALUES. With the ease of dragging and dropping fields into areas, experimenting with the PivotTable's output becomes easy.

2.3.1 Filters

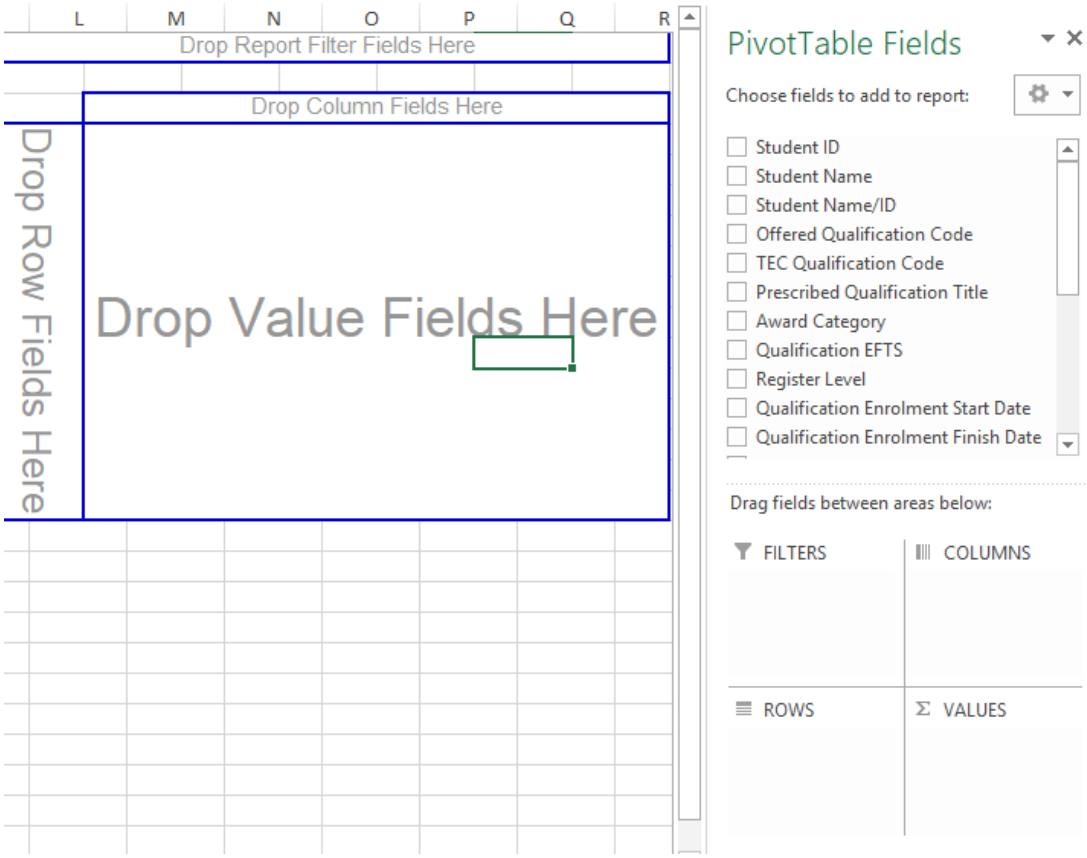
Filters allow you to filter on data that is not necessarily being displayed in the table. You can filter on Columns and Rows as well but to filter on data you do not wish to display you will need to drag and drop the field into the **FILTERS** area.

2.3.2 Columns

Columns are used to show the disparity of values on a field. If you were looking to inspect Course Outcomes you might wish to see the number of successful course completions (CCC 2) next to the number of unsuccessful course completions (CCC 3). In this case you would drag Course Completion Code into the COLUMNS area.

2.3.3 Rows

In general, you will want to put the fields you wish to group data on in the ROWS area. If for example you wanted to see Completions by Qualification Code, you would drag and drop the Qualification Code into the ROWS area.

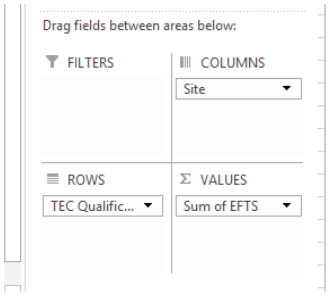


2.3.4 Values

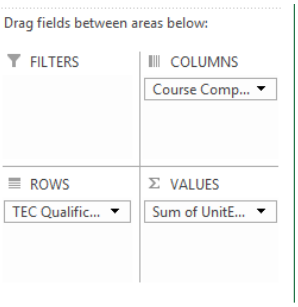
This area will contain what you are trying to quantify. By default, numbers entered into this area will generate as a sum, where other data types will be counted instead. This can be an important distinction to make. If for example you dragged the Student ID down into values you might expect a sum of the number of students currently recorded, however by default this would generate the sum of the student IDs. This same understanding needs to be applied to other fields, dragging the Complete field into the VALUES area will not show you only complete students, but rather a count of all values in the field (one for each student, regardless of whether complete or incomplete). If you wanted to summarize EFTS by Qualification you would drag the EFTS field to the VALUES area.

2.4 PivotTable Area Examples

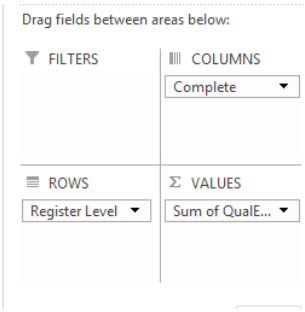
2.4.1 EFTS & Income



2.4.2 Course Enrolments



2.4.3 Qualification Enrolments



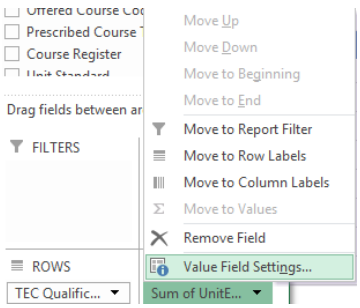
2.5 Tweaking and Customization

You may find that the output you want is a step or two further than you would like. For example you might be looking for completion rate (a percentage) rather than an output of how many complete, incomplete and total enrolments exist for a qualification. Alternatively you may want quick and easy control over filters using timelines and slicers.

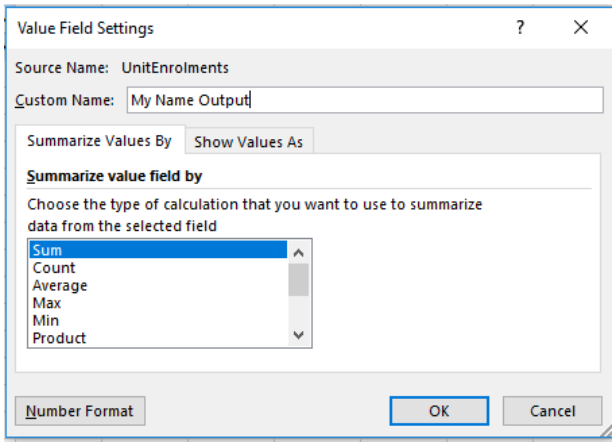
2.5.1 Show Value as Percentage

Follow the steps below to manipulate your value output:

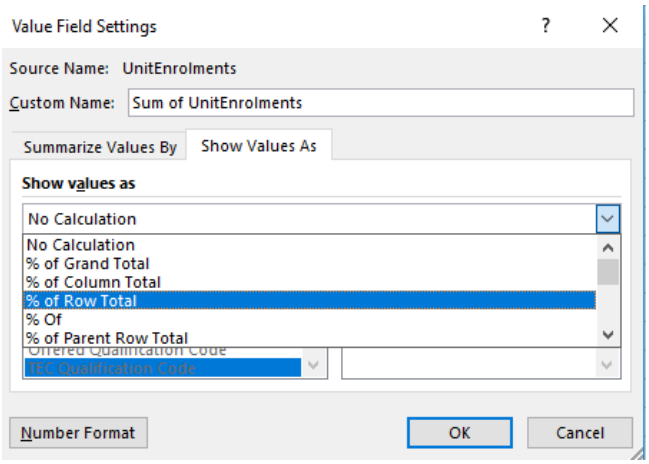
1. Click the black down facing arrow to the right of your value.
2. From the dropdown list select Value Field Settings…



3. The Value Field Settings… window allows you to modify the name of values field, change how it is summarized, how it is displayed, and its formatting in Excel. (Useful if you are looking for a mode of intakes that should be formatted as dates)

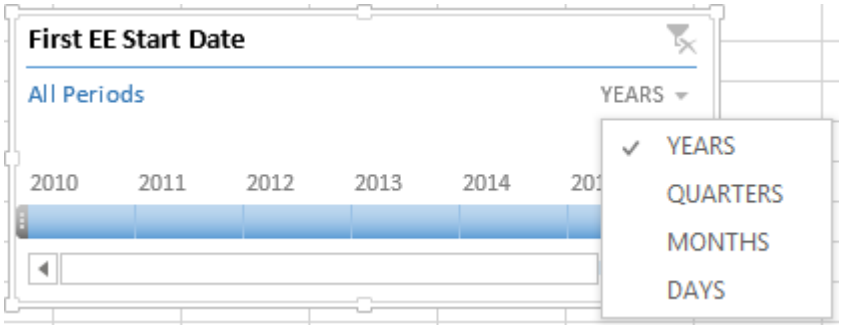


4. The Summarize Values By tab allows you to choose between various ways of quantifying your values. If you want to count the number of Student IDs, as mentioned in Section 2.3 above, you could do that here by clicking and highlighting Count instead of Sum. You could also look for an Average if you were using a field such as Mark, to see the average across all students. Choose your preferred summary calculation.
5. Click on the Show Values As tab. From here you can click on the arrow next to No Calculation to unveil a list of different calculations you can assign to your values. % of Row Total is a common and effective choice, depending on how you have populated your areas with fields.



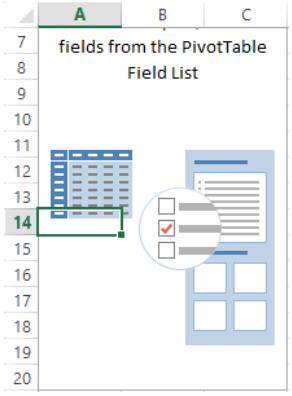
2.5.2 Adding Timelines

Follow the steps below to add Timelines to your PivotTable. Timelines allow you to easily filter onto a desired timeframe. You can set the timeline to increment by years, quarters, months or even days.

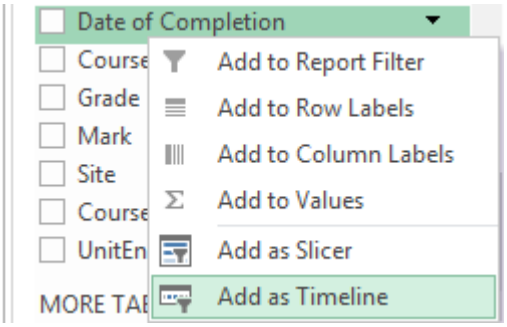


Follow the steps below to add a Timeline to your PivotTable:

1. Highlight your PivotTable. This is done by clicking and highlighting any cell within the PivotTable.



2. Your fields should show on the right hand side of your Excel window. Right click the date field you wish to use as a Timeline and select Add as Timeline.



Timelines can be manipulated in several ways. They can be dragged about on the spreadsheet by hovering above the Timeline header (the header will be the field that you have chosen, in the example above 'Date of Completion') and holding down the left click button once the 4 arrow icon is visible. ✥

You can also resize Timelines however you wish by hovering your mouse around one of the Timeline's edges.

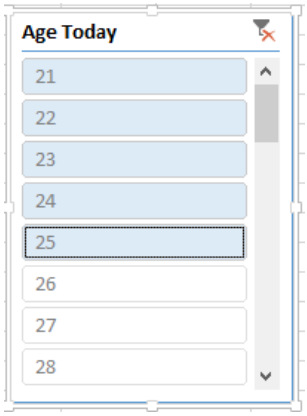
You may also wish to change increment of the Timeline from months to years. Click on the arrow next to where it states the current increment (ie: MONTHS), and select from the drop down list your desired value.

To use the filter, click on one of the squares below your desired start date and drag it across to your desired finish date. You can also click on one square and shift click another to highlight all areas between and including your two times.

You may also notice the top left icon

2.5.3 Adding Slicers

Slicers are in many ways similar to Timelines.



To create a Slicer, follow the same steps as above for Timelines, but select slicer instead.