Transition Extract Instructions and Tips

This report includes a variety of information related to transition for all children with TPCs due in the user-specified timeframe.

Run and save the report

Navigate to the ***Transition Extract*** on the **Reports** tab. Enter the desired date range and select the county. Then press "Get Report."
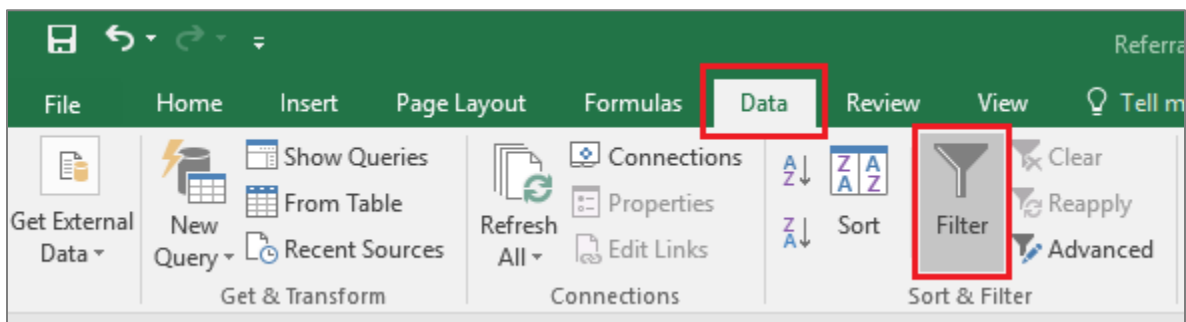

The default file format is CSV. In order to be able to utilize all functionality, save the file as an Excel file. To do so, click "Save As" and select the desired location. Type in the file name and select "Excel Workbook" in the "Save as type" field. Then press "Save."
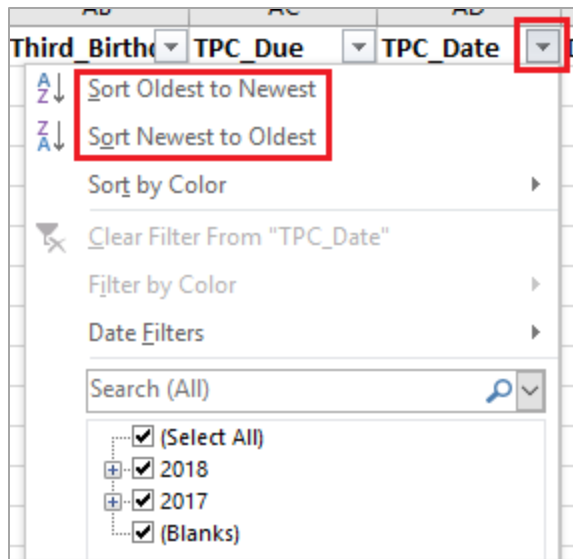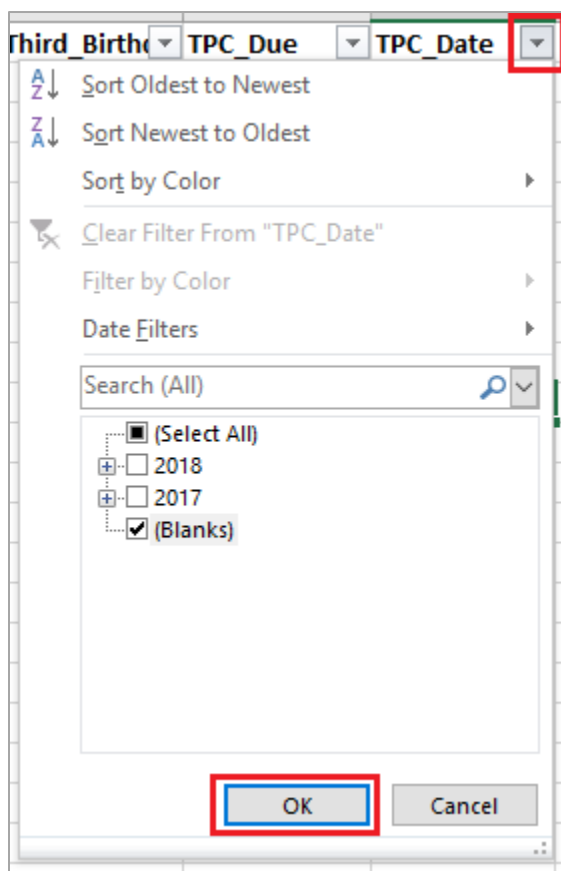

Sorting and Filtering

To utilize filters, first highlight the top row of the file that includes the field names. Then, navigate to the "Data" tab at the top of the file, then to the "Sort & Filter Section" and select "Filter."

Click on the filter button in any column to sort or filter data as desired. For example, to sort the file so that data are in order based on when TPCs are due, navigate to the "TPC_Due" column, click on the filter button, and select "Sort Oldest to Newest" or "Sort Newest to Oldest."
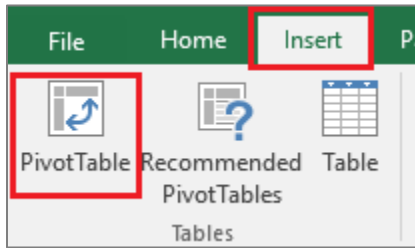
Data can also be filtered to only display selected information. For example, to select only records for which a TPC has not yet been entered, navigate to the "TPC_Date" field, and click on the filter button. Select "(Blanks)", then click "OK."
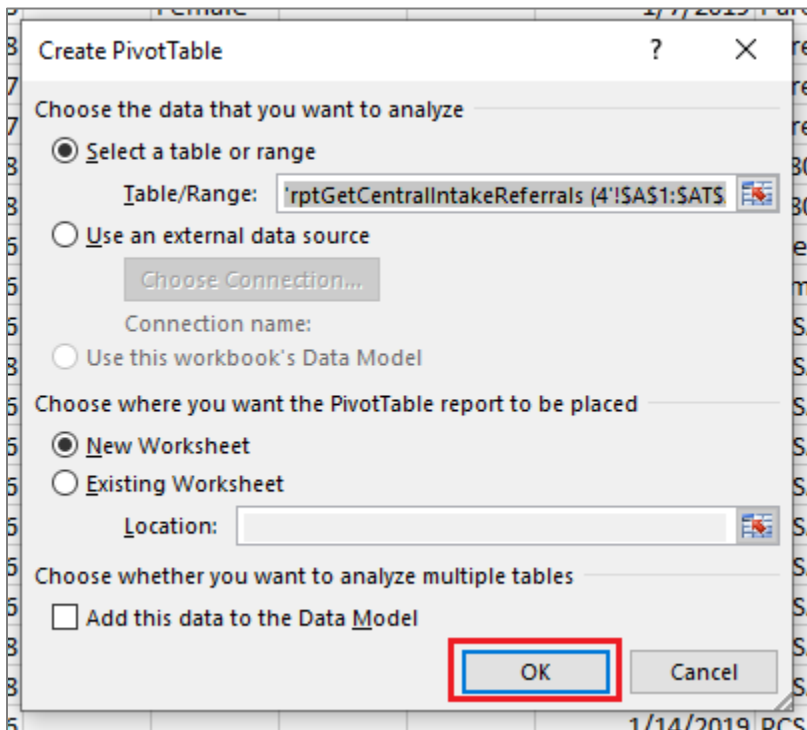
To utilize only a subset of the data, use filters to select the desired data, then copy and paste the data into a different tab. Alternatively, use filters to select unneeded data, delete the rows, then take the filter off to view desired data.
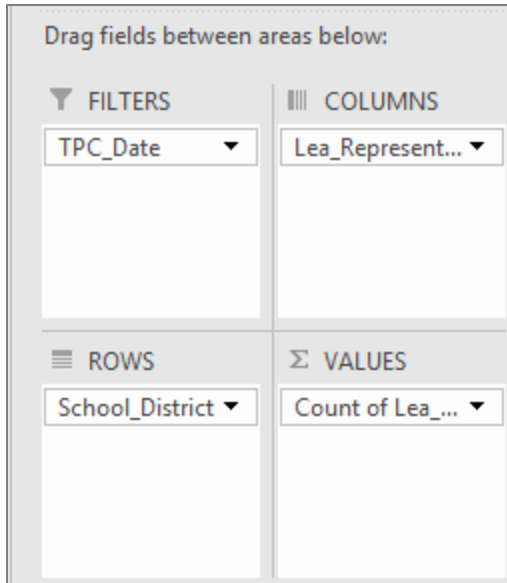
Pivot Tables

Pivot tables are a useful tool to quickly see a breakdown of data or to utilize filters without deleting information out of the file. Navigate to the "Insert" tab and then select "Pivot Table" in the "Tables" section.
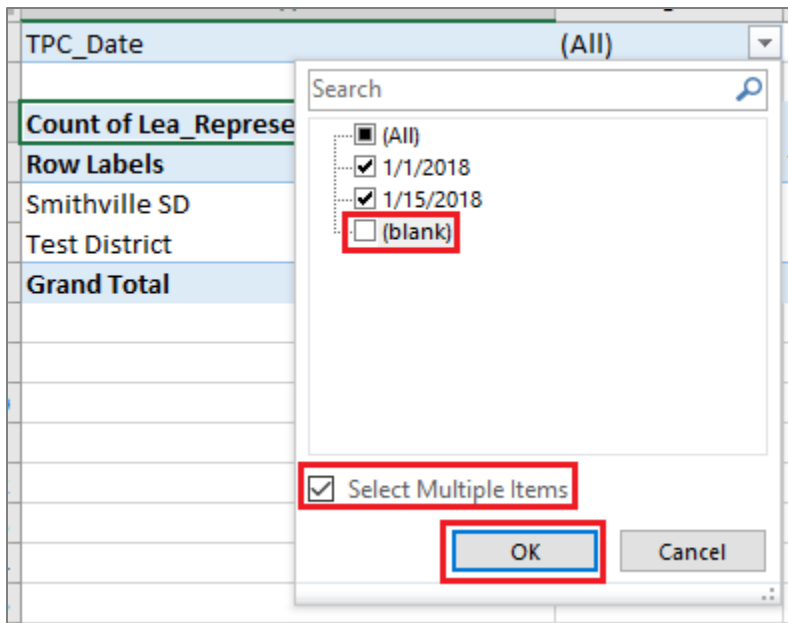

A box will pop up with options for creating the pivot table. The default table range should cover all the data in the file. Select whether the table is placed in a new worksheet or the current worksheet, then press "OK."

Drag fields of interest to the appropriate box below the pivot table fields. For example, to see how many TPCs included LEA representation by school district, drag the "TPC_Date" field to the "FILTERS" box, the "School_District" field to the "ROWS" box and the "Lea_Representative_Participant" field to the "COLUMNS" and "VALUES" boxes.

On the pivot table, navigate to the filter button for "TPC_Date" and select all values except "(blank)" by selecting "Select multiple values" then scrolling to the bottom of the list and removing the check mark next to "(blank)."

The table then displays the number of TPCs that included LEA representation by school district.

Count of Lea_Representative_Participant	Column Labels			
Row Labels	(blank)	Yes	No	Grand Total
Smithville SD			1	1
Test District		1		1
Grand Total		1	1	2

TPC_Date — (All)

Need Additional Resources or Assistance?

See the more comprehensive "Using Data in Excel" document for instructions on how to perform many other functions in Excel. If you have specific questions regarding how to obtain needed information from this or any report, email eids@dodd.ohio.gov at any time.