

Adding Filters to iConnect Reports in Excel

Introduction

Reports can be generated in iConnect and downloaded in Excel. Once downloaded into Excel, the report can then be sorted and filtered to fit the needs of the user. This job aid will give instructions on how to add filters and utilize filters in iConnect Reports.

Downloading Reports

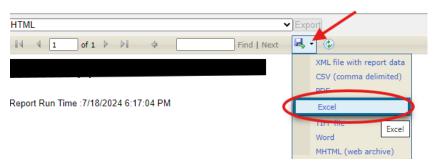
1. To begin, log into iConnect and set your Role. Click Go.

My Dashboard Sign Out	Role Service Provider	600	My Dashboard	Sign Out	Role WSC/CDC	
	My Dashboard	Sign Out Ro	le vice Provider Worker		GO	

- 2. Navigate to the desired Report.
 - a. Enter the criteria to execute the Report. Click View Report.



b. A report will be generated on the screen. Go to the caret next to the Save (floppy disk) icon. Select **Excel**.

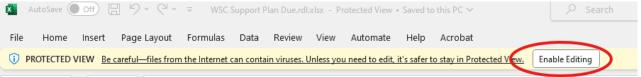


3. The Excel Report will download onto the device. Click the Report from the computer's downloads.





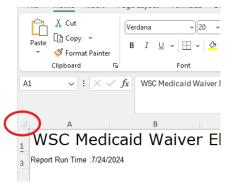
4. Once the Excel Report displays, click the **Enable Editing** button.



Unmerge Cells

Some reports are downloaded with cells merged to display the heading of the report.

1. To unmerge cells, click the triangle on the top left of the Excel document.



2. Once the document is highlighted, click Merge & Center.

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3. The cells will be unmerged.

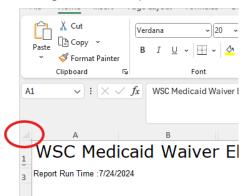
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As Needed: Undo Wrap Text

The user may want to unwrap text for a more condensed Report.

1. To unwrap text, click the triangle on the top left of the Excel document.



2. Once the document is highlighted, click Wrap Text.

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3. If the text needs to be wrapped, highlight the whole spreadsheet (the triangle) or the section that is needed to be wrapped. Navigate to and click **Wrap Text**.

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As Needed: Freezing Panes

The user may want to freeze the headings on the Report, so the headings stay at the top as the user scrolls down the Report.

1. To freeze the headings, click the row under the headings to highlight the row.

	А	В	D	E	F	Н	
1	WSC Med	icaid Waiver	⁻ Eligibilit	y Workst	neet Due		
3	Report Run Time :7/24/	2024					
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+	iConnectID	Consumer Name	Consumer Region	Primary Worker	Provider ID	WSC QO	Medicaid
6	11111111	Name of Consumer1	SUNCOAST	WSC, Sylvia	11111	WSC QO	Draft
7	22222222	Name of Consumer2	Suncoast	WSC, Sylvia	22222	WSC QO	Pending

2. Click **View** on the Menu bar.

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3. Then click, Freeze Panes and Freeze Panes in the dropdown.

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4 5 iConnectID 6 11111111	Consumer Name Name of Consumer1	Consumer Region	Primary Worker WSC, Sylvia	Provider ID	WSC QO			ledicaid Wai	ver Eligibility Worksheet Sta	tus Date Medicaid	d Waiv
7 22222222	Name of Consumer2	Suncoast	WSC, Sylvia	22222	WSC QO		F	ending		11/20/2023	

4. The headings will stay at the top as the user scrolls down the report.



A	В	D	E	F	
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iConnectID					
	Consumer Name	Consumer Region	Primary Worker	Provider ID	WSC QO
8 14444443	Consumer Name Name of Consumer13	Consumer Region SUNCOAST	Primary Worker WSC, Sylvia	Provider ID 144443	WSC QO

5. To unfreeze headings, navigate back to **Freeze Panes** and select **Unfreeze Panes**.

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$\begin{array}{c c} & \\ H26 & \checkmark \end{array} : \begin{array}{c} \times & \checkmark & f_x \end{array}$	Workbook Views	Show	Zoom	Unjecke Panes Unjeck all rows and columns to scroll through the entire worksheet.
A B 1 WSC Medicaid Wai	₀ iver Eligibility W	e F	Н	Freeze First Column Keep the first column visible while scrolling through the rest of the worksheet.

Add Filters

1. Click the row number on the left to highlight the row that has the headings of the Report. The example below shows row 5 as the row with headings.

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		iConnectID	Region	Consumer	Disposition	Primary	WSC QO	WSC QO	Last PCSP	Assessment
	5			Name		Worker Name		Email	QO Name	Program
		12345	Northwest	Consumer, One	APD Eligible -	WSC, Sylvia	ABC QO	Email@email.	ABC QO	Person-

2. Once highlighted, click the **Sort & Filter** button then select the **Filter** option. (The keyboard short cut is **Ctrl. + Shift + L**)

iConnectID Region	Consumer	Disposition	Primary	WSC QO	WSC QO	Last PC SP	Assessment	Form Statu	Is Review Ty	pe Reviewer	Support Plan Ef	a stilling Dista	PCSP Form	PCSP Form	Constant
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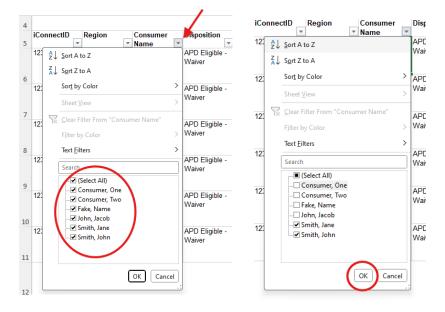
• If the **Sort & Filter** option is not visible, click **Editing** and the **Sort & Filter** option should become visible. Then select **Filter**.



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4. Click the caret at the heading that needs to be sorted. Checked items will be displayed. Uncheck items that do not need to be displayed. Press **OK** to save the filter. This step can be repeated in different headings as needed to sort by different criteria.



5. The Report will only display the items selected in the filter.

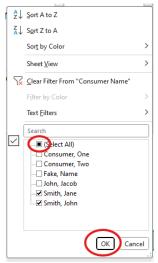


ľ	iConnectID	Region v	Consumer Name	Disposition	Primary Worker Nam ▼	WSC QO	WSC QO Email	Last PC SP QO Name	Assessment Program
	12348	Central	Smith, John	APD Eligible - Waiver	WSC, Sylvia	ABC QO	<u>Email@email.</u> <u>com</u>	ABC QO	Person- Centered Support Plan eff. 11/4/2021
)	12349	Suncoast	Smith, Jane	APD Eligible - Waiver	WSC, Sylvia	ABC QO	Email@email. com	ABC QO	Person- Centered Support Plan eff. 11/4/2021

6. Multiple headings can be filtered. The caret will show a filter icon when there are filters being utilized.



7. To undo a filter, click the filter icon and click **Select All.** Press **OK** to save the filter.



Sort Headings

1. After completing the <u>Downloading Reports</u>, select the heading that needs to be sorted. Navigate to and click the **Sort & Filter** icon and select the needed sorting option (**Sort A to Z** or **Sort Z to A**).



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iConnectID	Region	Consumer Name	Disposition	Primary Worker Name	WSC QO	WSC QO Email	Last PCSP QO Name	Assessment Program	Form Status	Review Type	Reviewer Name	Support Plan Effectiv		PCSP Form Expired	PC
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If the Sort & Filter option is not visible, click Editing and the Sort & Filter option should become visible. Then select the needed sorting option (Sort A to Z or Sort Z to A).

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5 iConnectID 12345	Region Northwest	Consumer Name Consumer, One	Disposition APD Eligible - Waiver	Primary Worker Name WSC, Sylvia	MSC QO	WSC QO Email Email@email.	Last PCS QO Name ABC QO	e Pr Pe	sessmer	Reapply	Na	ame SC, Sylvia

Custom Sort

1. After completing the <u>Downloading Reports</u>, navigate to and click **Sort & Filters**. Then select **Custom Sort**.

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iConnectID	Region	Consumer Name	Disposition	Primary Worker Name	WSC QO	WSC QO Email	Last PC SP QO Name	Assessment Program	Form Status	Review Type	Reviewer Name	Support Plan Effective Da	ate PCSP Form Expired	PCSPI
12348	Central	Smith, John	APD Eligible - Waiver	WSC, Sylvia	ABC QO	Email@email. com	ABC QO	Person- Centered	Pending	Annual	WSC, Sylvia	11/01/2023	No	Yes

• If the **Sort & Filter** option is not visible, click **Editing** and the **Sort & Filter** option should become visible. Then select **Custom Sort**.



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12346	Suncoast	Consumer, Two	APD Eligible - Waiver	WSC, Sylvia	ABC QO	Email@email. com	ABC QO		Open	Annual	WSC, Sylvia

2. The Sort options will display.

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3. In the **Sort by** dropdown, choose the heading that needs to be sorted.

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	Region Consumer Name Disposition Primary Worker Name			

4. In the **Sort On** dropdown, select how the items need to be sorted.

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Sort by Region 🗸	Cell Values 🗸 A to Z	~
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5. In the **Order** dropdown, select the order in which the headings need to be sorted. The options will vary depending on the **Sort On** dropdown selected.

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6. To add additional sorting criteria, click the **Add Level** button. A new line will be displayed to add the needed sorting criteria. Excel will first sort by the top criteria, then by the next. More sort criteria can be added as necessary by click the **Add Level** button.

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7. To delete a sort criteria, select the criteria that needs to be deleted and then click the **Delete Level** button.

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8. Press **OK** to activate the sorting criteria.

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