

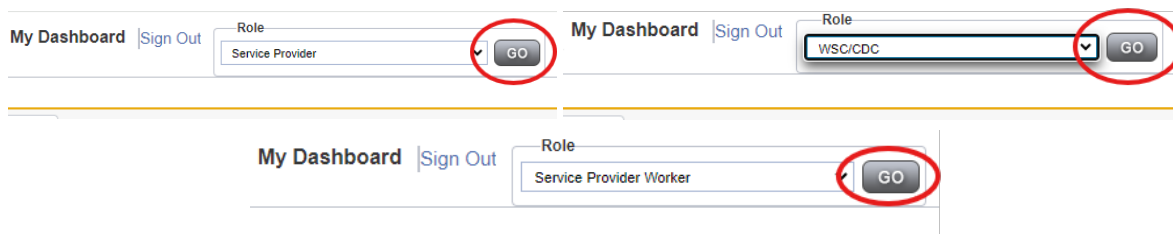
## Adding Filters to iConnect Reports in Excel

### Introduction

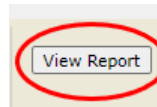
Reports can be generated in iConnect and downloaded in Excel. Once downloaded into Excel, the report can then be sorted and filtered to fit the needs of the user. This job aid will give instructions on how to add filters and utilize filters in iConnect Reports.

### Downloading Reports

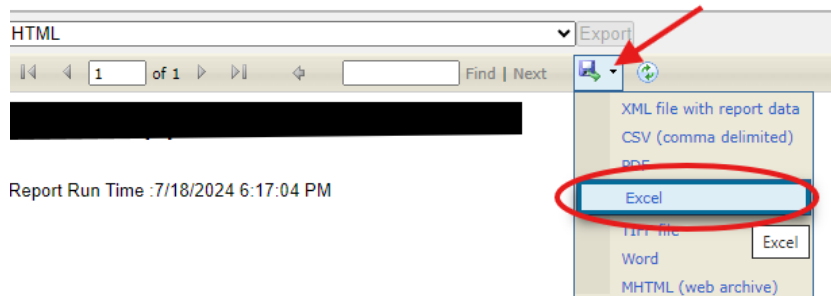
1. To begin, log into iConnect and set your Role. Click **Go**.



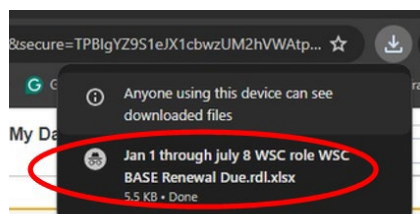
2. Navigate to the desired Report.
  - a. Enter the criteria to execute the Report. Click **View Report**.



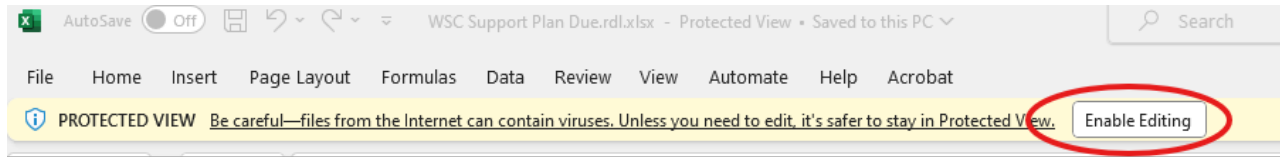
- b. A report will be generated on the screen. Go to the caret next to the Save (floppy disk) icon. Select **Excel**.



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



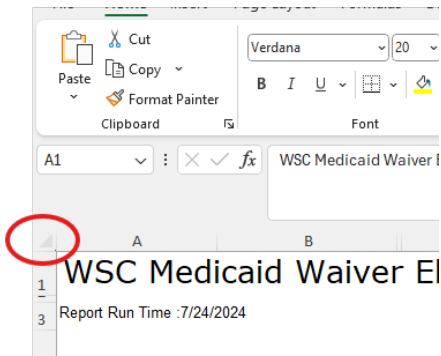
4. Once the Excel Report displays, click the **Enable Editing** button.



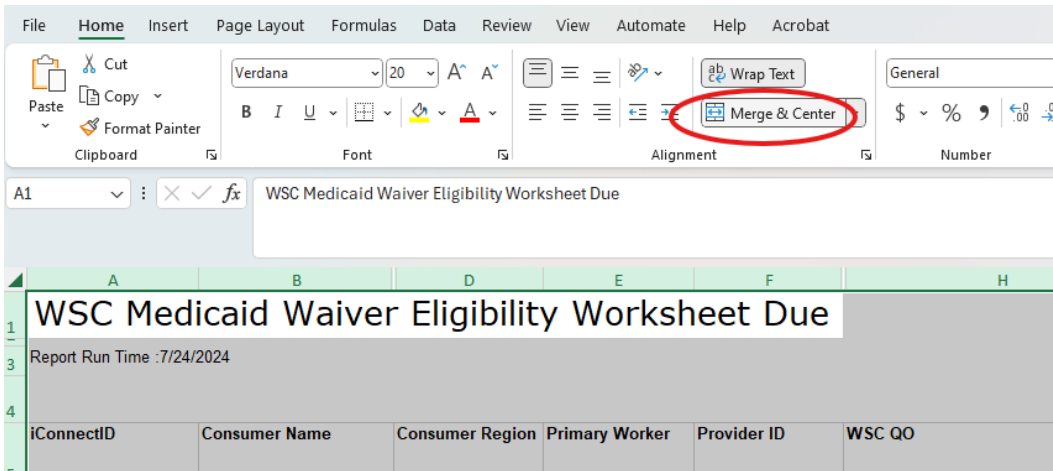
### Unmerge Cells

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

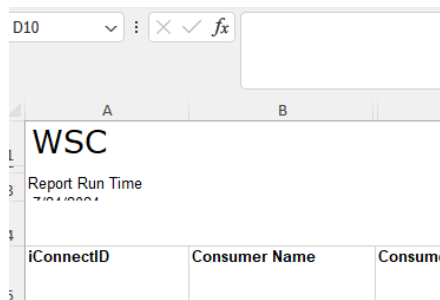
1. To unmerge cells, click the triangle on the top left of the Excel document.



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



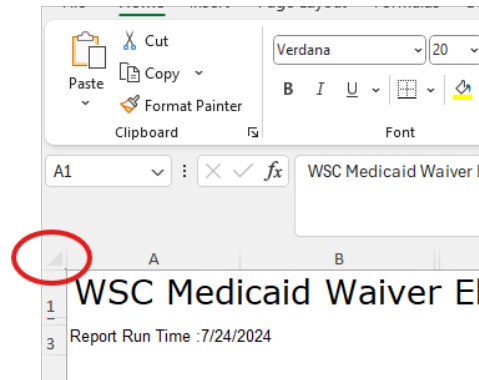
3. The cells will be unmerged.



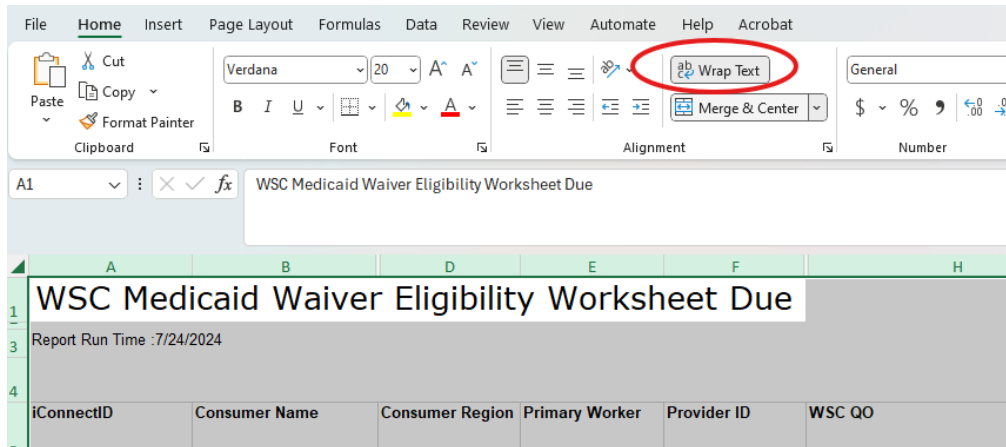
## As Needed: Undo Wrap Text

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

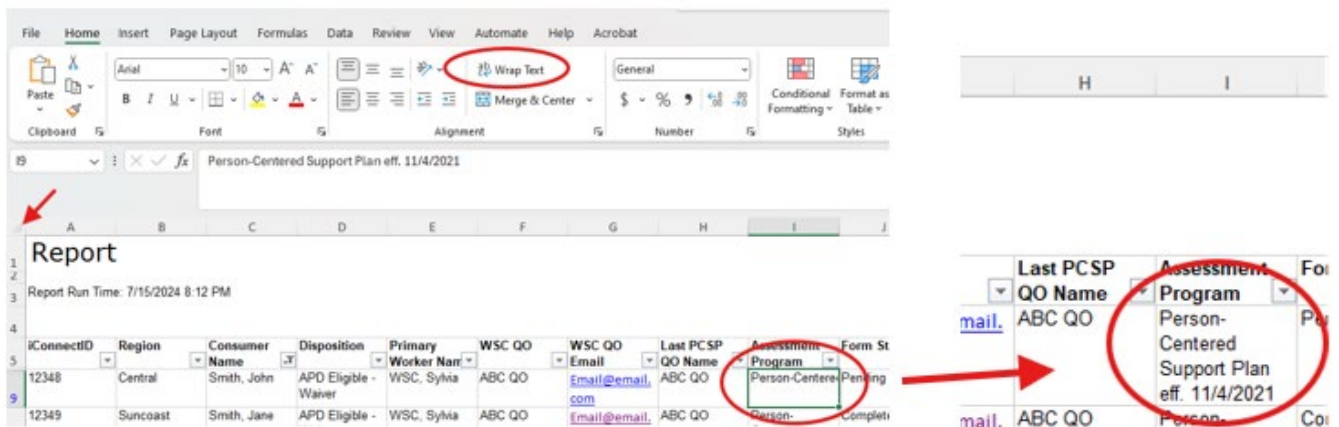
1. To unwrap text, click the triangle on the top left of the Excel document.



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



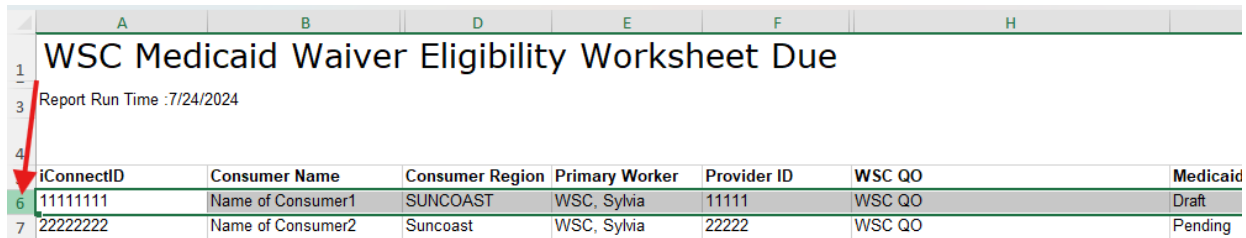
3. If the text needs to be wrapped, highlight the whole spreadsheet (the triangle) or the section that is needed to be wrapped. Navigate to and click **Wrap Text**.



## As Needed: Freezing Panes

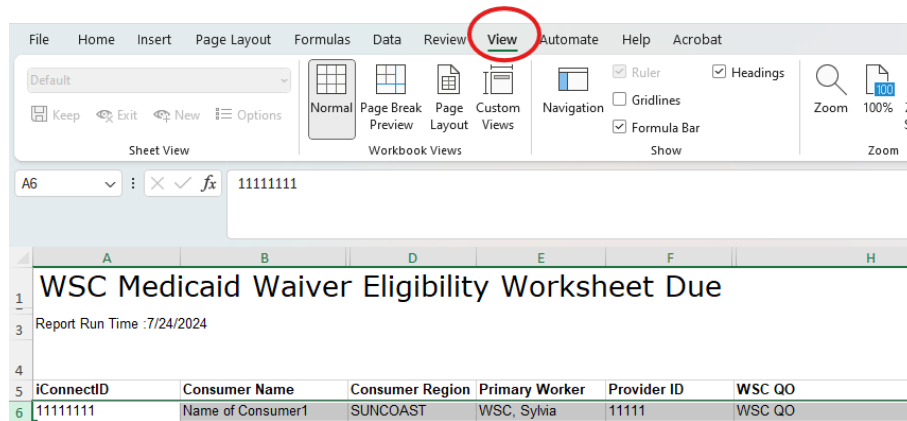
The user may want to freeze the headings on the Report, so the headings stay at the top as the user scrolls down the Report.

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

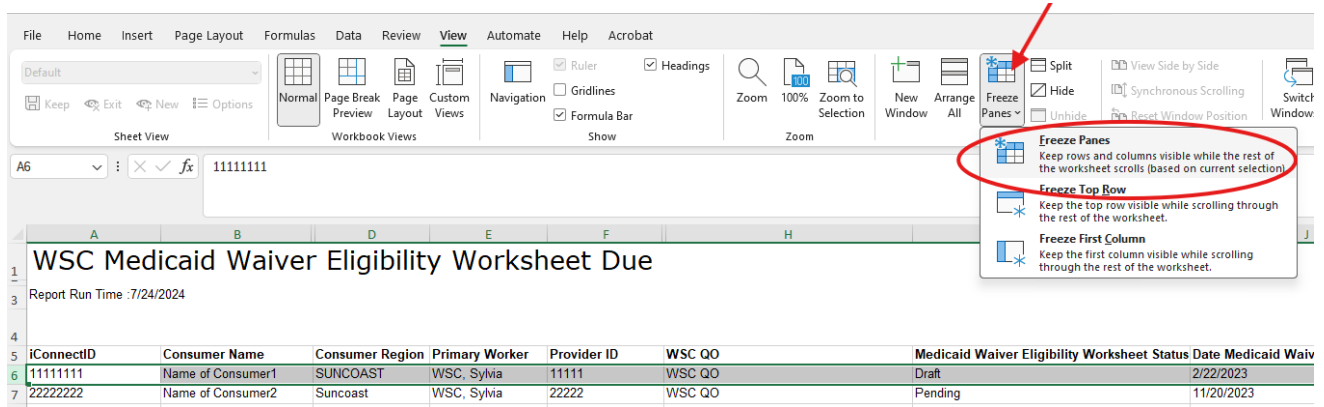


iConnectID	Consumer Name	Consumer Region	Primary Worker	Provider ID	WSC QO	Medicaid
11111111	Name of Consumer1	SUNCOAST	WSC, Sylvia	11111	WSC QO	Draft
22222222	Name of Consumer2	Suncoast	WSC, Sylvia	22222	WSC QO	Pending

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



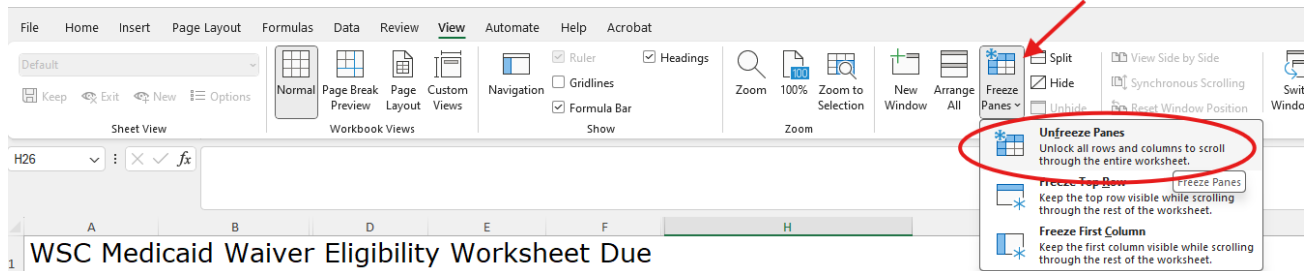
3. Then click, **Freeze Panes** and **Freeze Panes** in the dropdown.



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

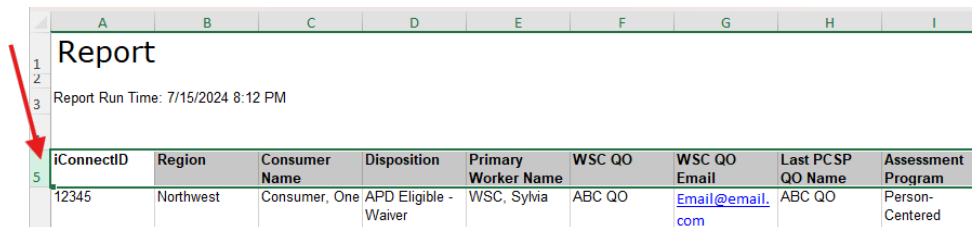
WSC Medicaid Waiver Eligibility Worksheet Due						
1	Report Run Time :7/24/2024					
4						
5	iConnectID	Consumer Name	Consumer Region	Primary Worker	Provider ID	WSC QO
18	144444443	Name of Consumer13	SUNCOAST	WSC, Sylvia	144443	WSC QO
19	155555554	Name of Consumer14	Suncoast	WSC, Sylvia	155554	WSC QO
20	166666665	Name of Consumer15		WSC, Sylvia	166665	WSC QO

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



## Add Filters

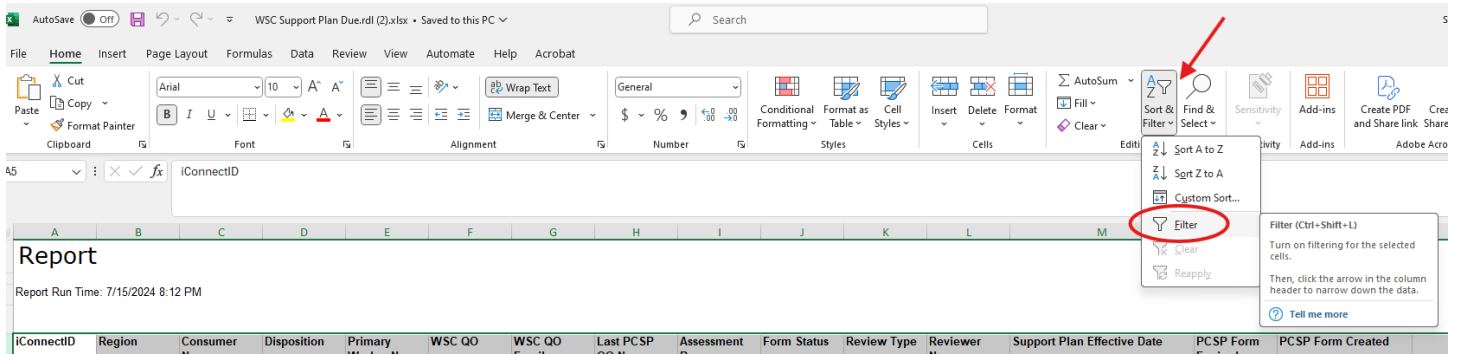
- Click the row number on the left to highlight the row that has the headings of the Report. The example below shows row 5 as the row with headings.



The screenshot shows an Excel spreadsheet with row 5 highlighted. The spreadsheet contains a report header and a table of data.

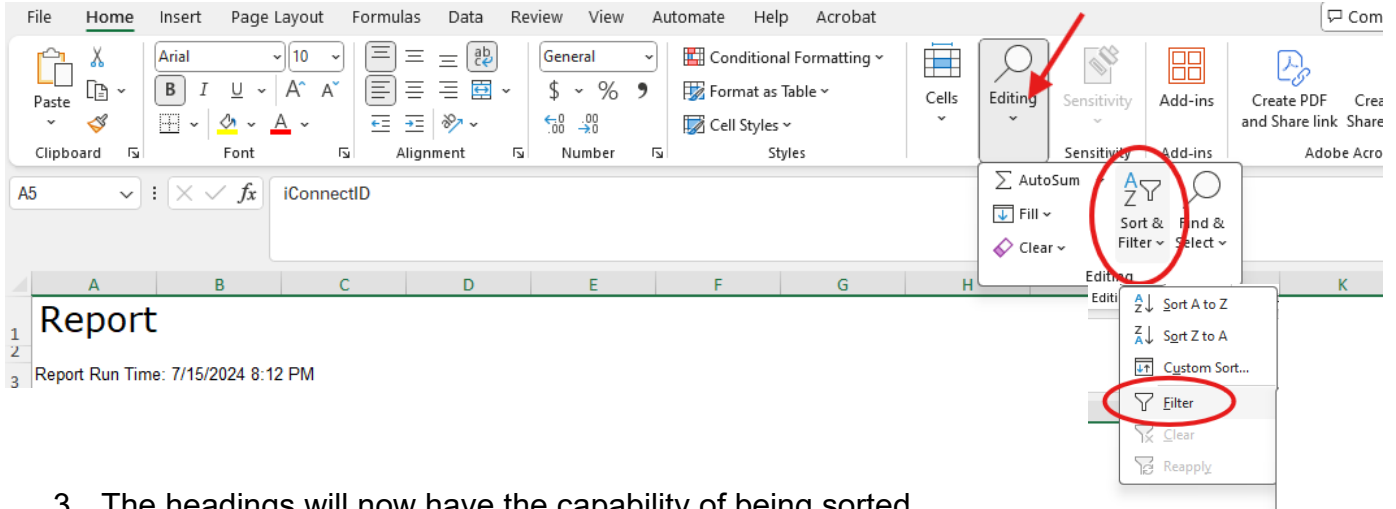
Report								
Report Run Time: 7/15/2024 8:12 PM								
iConnectID	Region	Consumer Name	Disposition	Primary Worker Name	WSC QO	WSC QO Email	Last PCSP QO Name	Assessment Program
12345	Northwest	Consumer, One	APD Eligible - Waiver	WSC, Sylvia	ABC QO	<a href="mailto:Email@email.com">Email@email.com</a>	ABC QO	Person-Centered

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

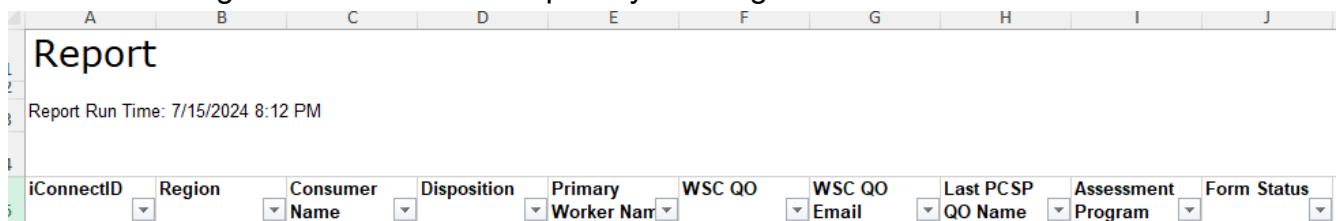


- If the **Sort & Filter** option is not visible, click **Editing** and the **Sort & Filter** option should become visible. Then select **Filter**.

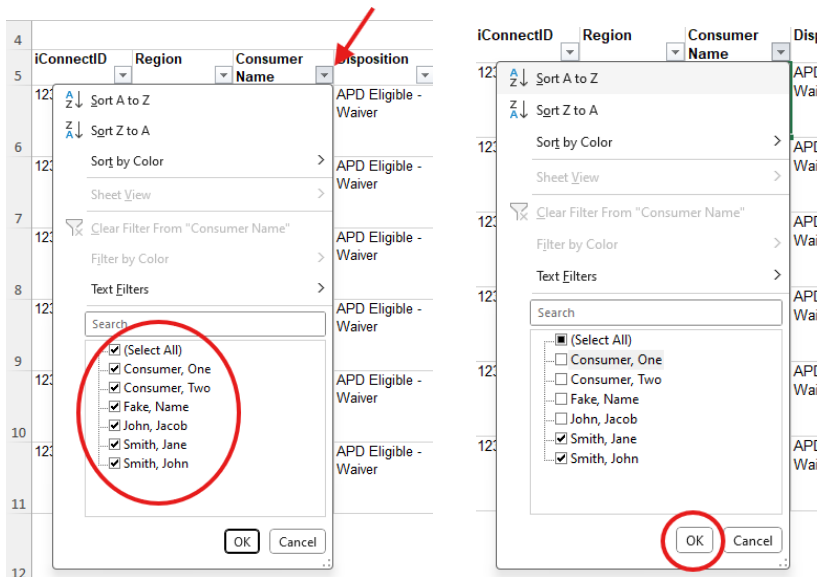
## How to Add Filters to iConnect Reports in Excel



3. The headings will now have the capability of being sorted.



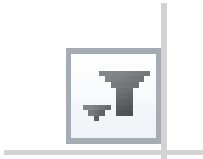
4. Click the caret at the heading that needs to be sorted. Checked items will be displayed. Uncheck items that do not need to be displayed. Press **OK** to save the filter. This step can be repeated in different headings as needed to sort by different criteria.



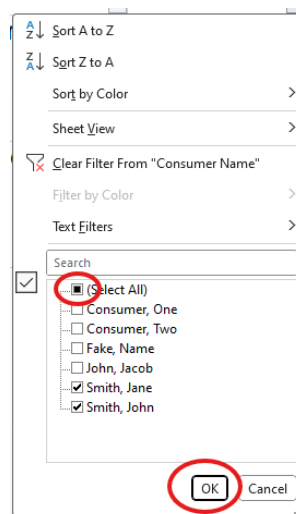
5. The Report will only display the items selected in the filter.

iConnectID	Region	Consumer Name	Disposition	Primary Worker Name	WSC QO	WSC QO Email	Last PCSP QO Name	Assessment Program
12348	Central	Smith, John	APD Eligible - Waiver	WSC, Sylvia	ABC QO	<a href="mailto:Email@email.com">Email@email.com</a>	ABC QO	Person-Centered Support Plan eff. 11/4/2021
12349	Suncoast	Smith, Jane	APD Eligible - Waiver	WSC, Sylvia	ABC QO	<a href="mailto:Email@email.com">Email@email.com</a>	ABC QO	Person-Centered Support Plan eff. 11/4/2021

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

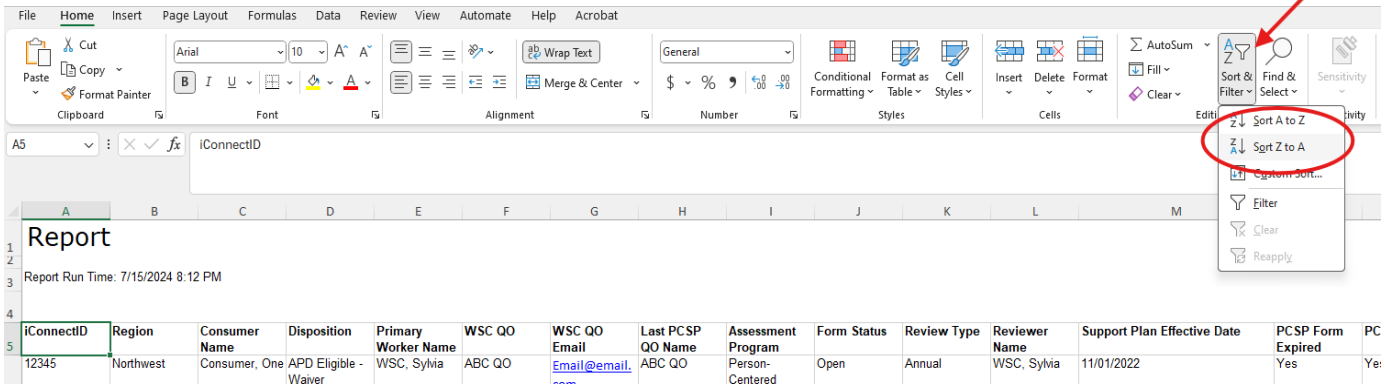


- To undo a filter, click the filter icon and click **Select All**. Press **OK** to save the filter.

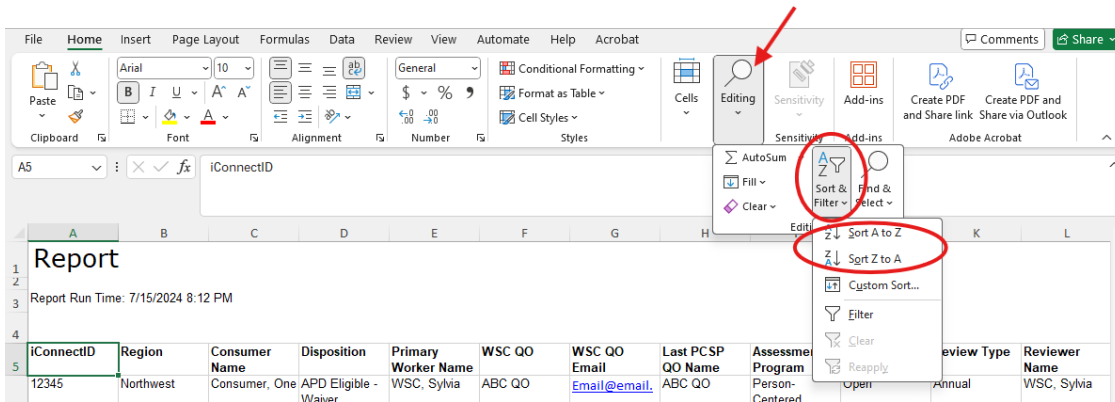


### Sort Headings

- After completing the [Downloading Reports](#), 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**).

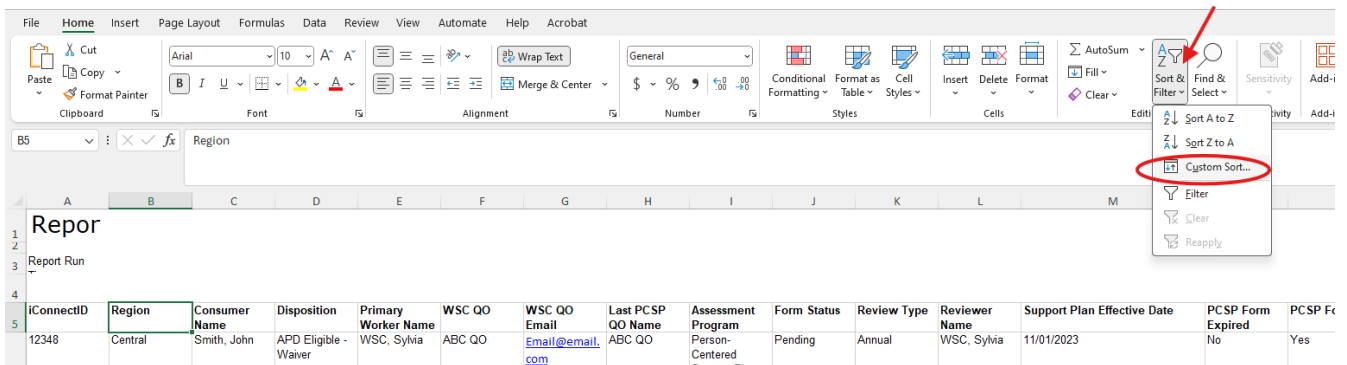


- If the **Sort & Filter** option is not visible, click **Editing** and the **Sort & Filter** option should become visible. Then select the needed sorting option (**Sort A to Z** or **Sort Z to A**).



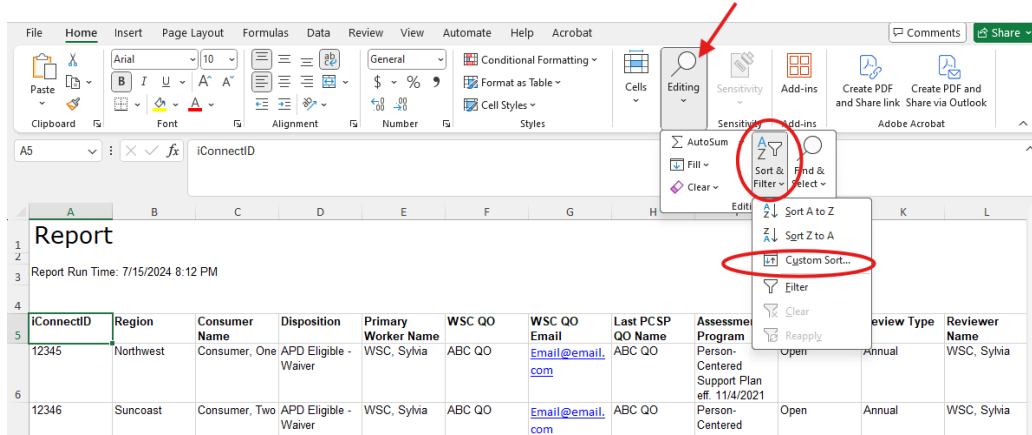
## Custom Sort

1. After completing the [Downloading Reports](#), navigate to and click **Sort & Filters**. Then select **Custom Sort**.

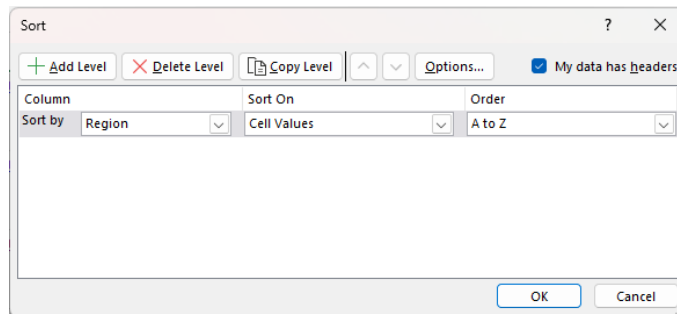


- If the **Sort & Filter** option is not visible, click **Editing** and the **Sort & Filter** option should become visible. Then select **Custom Sort**.

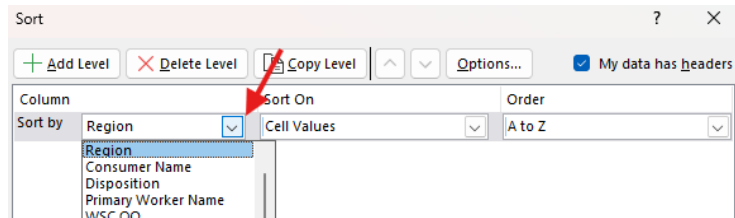




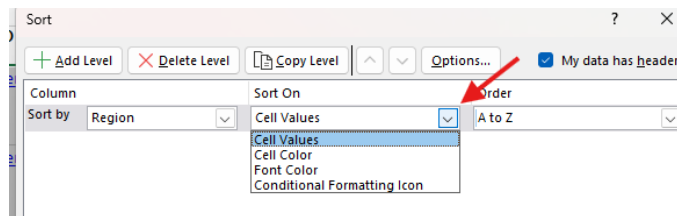
2. The Sort options will display.



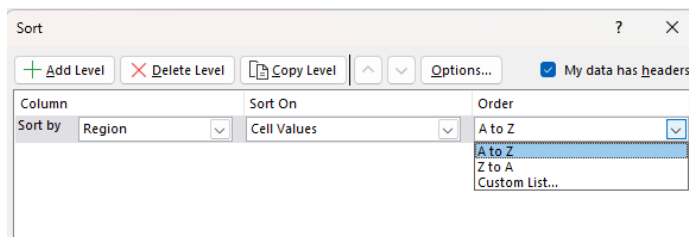
3. In the **Sort by** dropdown, choose the heading that needs to be sorted.



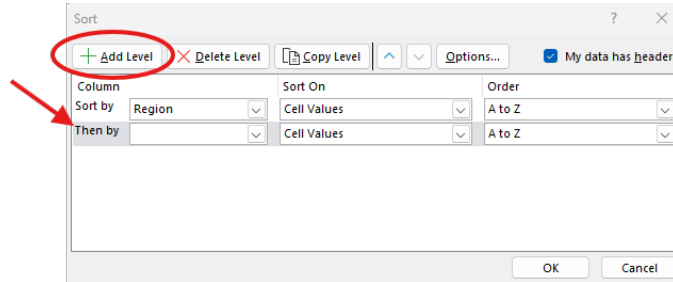
4. In the **Sort On** dropdown, select how the items need to be sorted.



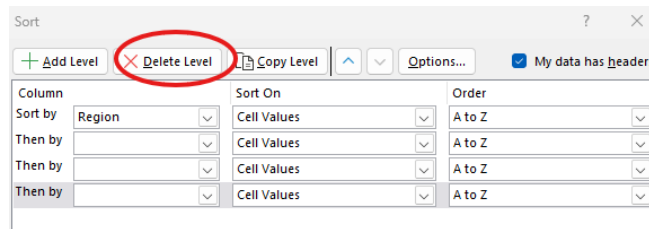
5. In the **Order** dropdown, select the order in which the headings need to be sorted. The options will vary depending on the **Sort On** dropdown selected.



- 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.



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



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

