

How Do I...

Add an Auto-Filter in Excel?

Problem

When I export a report to Excel Data, my report needs filters so I can sort within Excel.

Solution

By adding an Auto-Filter in Excel, filtering, sorting and more is available in each column.

Process

1. Open the exported report in Excel.

NOTE: When saving a report from TCM to Excel, try to use Excel DATA as the format. The data will be cleaner for use in Excel than Excel REPORT.

2. Click on the top left hand corner button [RED] at the intersection of the row and column headers.

3. Click on the **Filter** button [BLUE]. You will now see arrows on each column header.

4. You may also need to adjust the column width of each column by choosing **AutoFit Column Width**. (Go to Home → Format → AutoFit Column Width)

5. Now when you click one of the arrows on the header, you can choose to **SORT** [RED] or **FILTER** [BLUE].

6. At other times, you may wish to filter by more than one column (State then Last Name or Campaign then Year). This can be accomplished by clicking the **Sort and Filter** button (Go to Home → Sort and Filter).

7. Now, just click on **Add Level** [RED] to define multiple levels of sorting.

