# 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

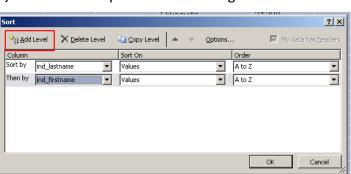
By adding an Auto-Filter in Excel, filtering, sorting and more is available in each column.

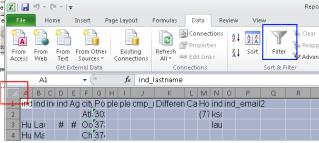
#### **Process**

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.
- 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.





Sort Z to A

Text <u>F</u>ilters

✓ (Select All)
✓ 1993 REG
✓ 1994 REG
✓ 1995 REG
✓ 1996 REG
✓ 1997 REG

Sort by Color

