



# eWReport Practice Group – YJ Referral Report Session One: Use Excel Basics to Organize YJ Referral Data

### **Optional Prep for this Session**

Excel is all about details! If you don't use Excel frequently or could use a refresher of some foundational basics (like the layout of the program, how cells are named, how to select a range, etc.), check out <u>The</u> <u>Beginner's Guide to Excel</u>, a 20 minute tutorial from Technology for Teachers and Students.

## Add, Move, Rename, Copy, and Delete Sheets

### 1. Add a Sheet

- **1a.** Click on the plus sign to the left of the bottom scroll bar.
- **1b.** A new sheet called "Sheet x" will appear directly to the right of the sheet you were on when you clicked the add sheet button.

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2. To Move a Sheet, click on the name of the sheet you would like to move and simply drag it to where you want it.

#### Use Excel Basics to Organize YJ Referral Data

- 3. To Rename a Sheet, you can use one of two options:
  - 3a. Double click on the name of the sheet you want to rename.A cursor will appear in the sheet name. Once you have entered the new name, click anywhere on the sheet to update.
  - **3b.** Right click on the name of the sheet you want to rename. A small menu will pop up. Select "Rename sheet." A cursor will appear in the sheet name. Once you have entered the new name, click anywhere on the sheet to update.

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#### 4. Copy a Sheet.

- **4a.** Right click on the name of the sheet you'd like to copy. In the small menu that pops up, select "Move or Copy."
- **4b.** In the pop up that appears, check the box to "Create a copy" and then hit ok.

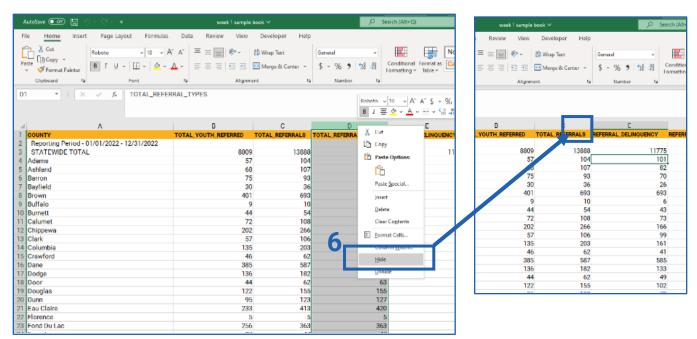
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5. To **Delete a Sheet**, right click on the sheet you would like to remove. In the menu that pops up, select "delete."

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13	06/27/2023	01/01/2022	12/31/2022	Adams	12/13/202	2 Perik, Karen	
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17	06/27/2023	01/01/2022	12/31/2022	Adams	09/19/	Rename	
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## **Hide and Unhide Columns and Rows**

6. To Hide a Column, right click on the name of the column (or columns) you wish to hide – the entire column should now be highlighted. In the menu that pops up, select "hide." The width of the column will shrink so it is no longer visible.



7. To **Unhide a Column**, select the names of the columns directly to the right and left of the column you want to unhide and right click – both columns should now be highlighted. In the menu that pops up, select "unhide." The column that was hidden should now re-appear.

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46			Hide	12
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136			Unhide	47
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122	155			50

**TIP:** To select multiple columns, click on the letter name of the first column you are interested in and drag your cursor over to the letter name of the last column you'd like to select.

Use Excel Basics to Organize YJ Referral Data

8. To **Hide a Row**, right click on the name of the row you want to hide – the entire row should now be highlighted. In the menu that pops up, click "hide." The height of the row will now shrink so it is no longer visible.

46 Oconto		66	96	100	87	
47 Oneida	X Cut	71	113	113	92	
48 Outagamie		318	463	464	309	13
49 Ozaukee	Da ⊆opy	66	84	84	82	
50 Pepin	Paste Options:	18	20	20	16	
51 Pierce	<u></u>	67	107	106	74	2
52 Polk	<u>C</u>	55	63	63	56	
53 Portage	Paste Special	77	100	99	90	
54 Price		22	29	29	23	
55 Racine	Insert	200	276	276	273	
56 Richland	Delete	14	16	16	16	1
57 Rock	Clear Contents	330	598	597	553	1
58 Rusk	Clear Cogtents	49	58	58	37	2
59 Saint Croix	E Eormat Cells	158	211	210	134	4
	E Comme central	134	201	201	187	1
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50	Pepin	18	20	20	
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52	Polk	55	63	63	116.
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66	Trempealeau	55	69	69	the la
67	Vernon	26	33	33	ممامه
68	Vilas	79	130	130	seleo
69	Walworth	129	180	179	

rows using the same strategy used to select multiple columns. Click on the number name of the first row you'd like to highlight and drag your cursor to the number name of the last row you'd like to select.

**9.** To **Unhide a Row**, select the names of the rows directly above and below the row you want to unhide and right click – both rows should now be highlighted. In the menu that pops up, select "unhide." The row that was hidden should now reappear.

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45	Monroe		108	163	163	155
46	Oconto	🔏 Cut	66	96	100	87
47	Onelda	D Copy	71	113	113	92
48	Outagamle		318	463	464	309
49	Ozaukee	Paste Options:	66	84	84	82
50	Pepin	<u>Ch</u>	18	20	20	16
51	Pierce		67	107	106	74
52	Polk	Paste Special	55	63	63	56
53	Portage	Insert	77	100	99	90
54	Price		22	29	29	23
55	Racine	<u>D</u> elete	200	276	276	273
56	Richland	Clear Contents	14	16	16	16
57	Rock	-	330	598	597	553
58	Rusk	Eormat Cells	49	58	58	37
59	Saint Croix	Bow Height	158	211	210	134
60	Sauk	Hide	134	201	201	187
61	Sauk Sawyer		55	66	66	62
62	Shawano	Unhide	76	139	139	139
63	Sheboygan		252	400	400	381
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68	Vilas		79	130	130	129
69	Walworth		129	180	179	159
70	Washburn		27	35	35	33

## Freeze and Unfreeze Columns and Rows

- 10. To Freeze a Column or Row, navigate to the "View" Ribbon and find the "Window" group. Click on the "Freeze Panes" button.
  - 10a. To freeze row 1 of your sheet, select "Freeze Top Row."
  - 10b. To freeze column A of your sheet, select "Freeze "First Column."
  - 10c. To freeze several rows in your sheet, click on the row directly below the last row you'd like frozen and then select "Freeze Panes" in the Freeze Panes menu.
  - 10d. To freeze several columns in your sheet, click on the column directly to the right of the last column you'd like frozen and then select "Freeze Panes" in the Freeze Panes menu.

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		07	107	82	25
-	-	93	93	70	22
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40		93	698	693	1
		10	10	6	4
<u>/</u>	14 !	54	54	43	11

### 10-

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1 COUNTY		TOTAL_YOUTH_REFER	RED TOTAL_REF		COUNTY Reporting Period - 01/0	1/2022 12/21/2022	LOCATION_COMMUNITY	LOCATION_DETENTION
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72 Waukesh	na		409					30
73 Waupaca	1		76		Ashland			43
, 74 Waushar			33		Barron			25
75 Winneba			391		Bayfield			6
76 Wood	90		262	8	Brown		3	49
77			202	9	Buffalo			6
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3 STATEW 67 Vernon		<u>8809</u> 26	2 Re 3 ST 4 Ada	porting Period - ATEWIDE TOTA ms		880	09 13888 57 104	
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#### Use Excel Basics to Organize YJ Referral Data

**11.** To **Unfreeze a Pane**, navigate to the "Freeze Panes" button and select "Unfreeze Panes." The option to unfreeze a pane will only display when there is something to unfreeze.

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E24		ook Views	Show	Zoom	Unfreeze Panes Unlock all rows and columns to scroll through the entire worksheet.	
			0	1	Keep the top row visible while scrollin through the rest of the worksheet.	g
1	A	B TOTAL_YOUTH_REFERRED	C TOTAL_REFERRALS	D TOTAL_REFERRAL_TYPES REFER	RR4 Freeze First Column Keep the first column visible while	REFERRA
2	Reporting Period - 01/01/2022 - 12/31/2022				scrolling through the rest of the work	sheet.
3	STATEWIDE TOTAL	8809	13888	13929	11775	1500
4	Adams	57	7 104	104	101	0
5	Ashland	68	3 107	107	82	25
6	Barron	75	5 93	93	70	22

**NOTES:** Using "Freeze Panes" to freeze a row will freeze your selected row and everything above it. Using "Freeze Panes" to freeze a column will freeze your selected column and everything to the left of that column.

It is not possible to freeze both a column and a row – you can only select one or the other. Consider using a table if you'd like the header labels to always display as you scroll down the sheet.

You cannot use undo to unfreeze a pane!

### Filter and Sort

**12.** To **Turn on Filters**, navigate to the "Data" Ribbon and then click on the "Filter" button. When the filter is turned on, little arrows (filter controls) will appear in the table headers.

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~							
	06/27/2023	01/01/2022	12/31/2022	Adams	06/02/2022	Perik, Karen	

- **13.** To **Quick Filter or Sort One Column**, click on the arrow in the column you'd like to sort.
  - 13a. Check or uncheck

specific options from the drop-down list to filter, then click ok. When a column is filtered, a filter symbol will appear in the box next to the column heading and the number name text of the row will turn blue.

**13b.** To sort a column, use one of the options at the top of the menu, then click ok. When a column is sorted, an arrow corresponding with the option selected will appear in the box next to the column heading.

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6 0		01/01/2022	12/31/2022	Adams	Z J Sort Z to A	
70		01/01/2022	12/31/2022	Adams	A* =	
8 0		01/01/2022	12/31/2022	Adams	Sort by Color	>
9 0		01/01/2022	12/31/2022	Adams	Sheet <u>V</u> iew	>
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	/27/2023	01/01/2022	12/31/2022	Adams	Filter by Color	
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18 0	/27/2023	01/01/2022	12/31/2022	Adam 3	Adamski, Jamie	
19 0	/27/2023	01/01/2022	12/31/2022	Adams	Alioto, Bob	
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21 0	/27/2023	01/01/2022	12/31/2022	Adams	Anderson, Jody	
22 0	/27/2023	01/01/2022	12/31/2022	Adams	Anderson, Mercedes	
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27 0	/27/2023	01/01/2022	12/31/2022	Adams	05/23/2022 Perik, Karen	

### 14. Sort Multiple Columns.

- **14a.** Click the "Sort" button in the "Data" Ribbon.
- **14b.** In the window that pops up, select the first column you'd like Excel to sort. You can then add additional sort criteria by clicking the "Add Level" button.

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05/09/2022	Per k, Karen	8470164	233	

### Create a Table

15. Creating a Table is another strategy you can use to add filter controls to your headings. Creating a table also ensures headers will remain frozen at the top of the screen when you scroll through sheets. This is also one of the first steps to create a pivot table or run formulas with data from different sheets.

15a. First, check your data set. Tables work best in sheets that are



consistently formatted and

don't have lots of blank rows or columns.

In the YJ Referral report, the Youth Detail and Referral Detail sheets are the best candidates for tables.

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3	06/27/2023	01/01/2022	12/31/2022	Adams	06/02/2022	Perik, Karen
4	06/27/2023	01/01/2022	12/31/2022	Adams	11/23/2022	Perik, Karen
5	06/27/2023	01/01/2022	12/31/2022	Adams	05/23/2022	Perik, Karen
6	06/27/2023	01/01/2022	12/31/2022	Adams	05/09/2022	Perik, Karen
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8	06/27/2023	01/01/2022	12/31/2022	Adams	11/21/2022	Perik, Karen

- 15b. To insert a table, click on any cell in the sheet. Then, in the "Insert" Ribbon, click the "Table" button.
- 15c. A dialog box will pop up asking you to specify the range of your table. Make sure "My table has headers" is checked. Then click ok. Voila - a new table should appear!

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2022	Perik, Karen					
/2022	Perik, Karen					
2022	Perik, Karen					
/2022	Perik Karen					

**NOTE:** Remember, a range is described using the upper-left most cell and the lower-right most cell. You can use the scroll bars to double check the range selected matches the range you want to include in your table, but be careful not to click anywhere on the sheet as you look - that will automatically change the range!

If you do accidentally click the screen and change the range, just hit cancel.

**15d. Format your table.** If you want to change the appearance of the table, you can use the options in the "Table Design" Ribbon to adjust whether the rows are banded, the colors, etc.

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**NOTE:** The "Table Design" Ribbon will only appear when you click on a sheet that contains a table.

**15e.** On the left side of the "Table Design" Ribbon, is the "Properties" group. You can rename your table by clicking into Table Name field.

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**NOTE:** Table names cannot contain spaces or special characters. To make it easy to reference your table in the future, choose a name that is descriptive, short, and easy to remember.

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