



eWReport Practice Group – YJ Referral Report

Session One: Use Excel Basics to Organize YJ Referral Data

Optional Prep for this Session

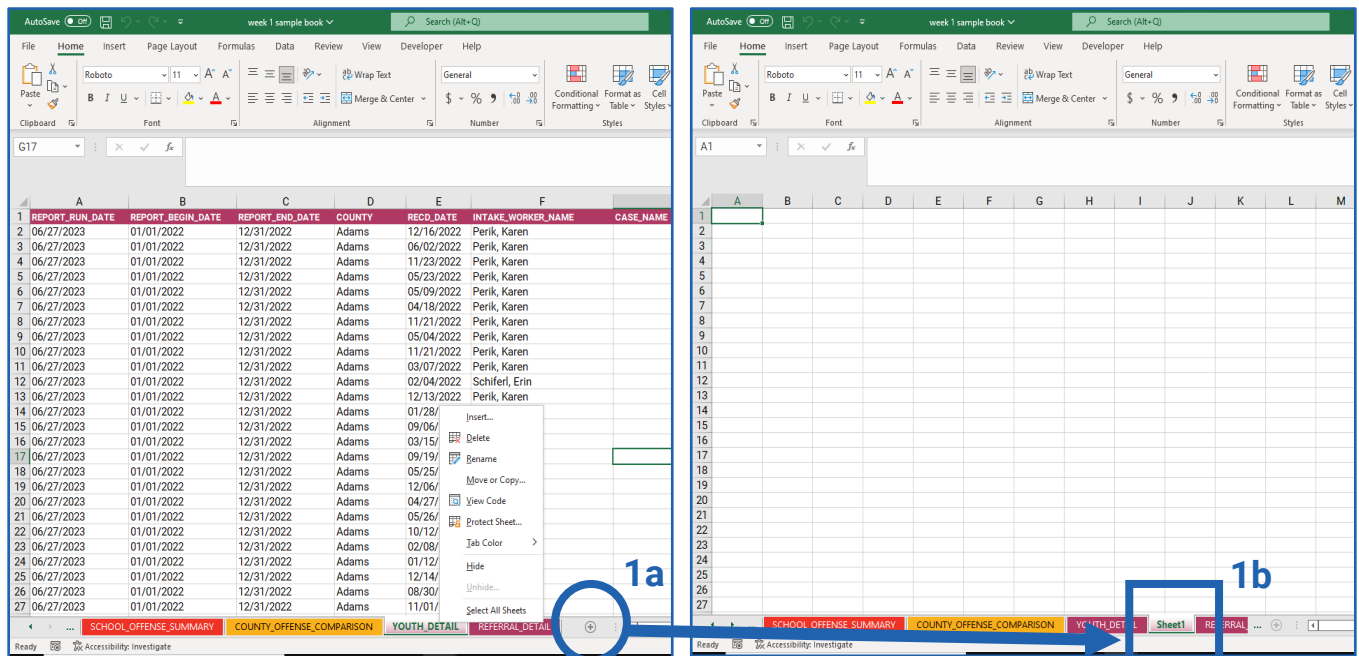
Excel is all about details! If you don't use Excel frequently or could use a refresher of some foundational basics (like the layout of the program, how cells are named, how to select a range, etc.), check out [The Beginner's Guide to Excel](#), a 20 minute tutorial from Technology for Teachers and Students.

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.



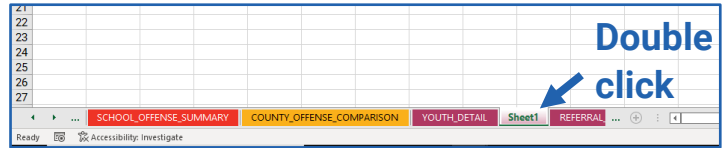
REPORT_RUN_DATE	REPORT_BEGIN_DATE	REPORT_END_DATE	COUNTY	RECD_DATE	INTAKE_WORKER_NAME	CASE_NAME
06/27/2023	01/01/2022	12/31/2022	Adams	12/16/2022	Perik, Karen	
06/27/2023	01/01/2022	12/31/2022	Adams	06/02/2022	Perik, Karen	
06/27/2023	01/01/2022	12/31/2022	Adams	11/23/2022	Perik, Karen	
06/27/2023	01/01/2022	12/31/2022	Adams	05/23/2022	Perik, Karen	
06/27/2023	01/01/2022	12/31/2022	Adams	05/09/2022	Perik, Karen	
06/27/2023	01/01/2022	12/31/2022	Adams	04/18/2022	Perik, Karen	
06/27/2023	01/01/2022	12/31/2022	Adams	11/21/2022	Perik, Karen	
06/27/2023	01/01/2022	12/31/2022	Adams	05/04/2022	Perik, Karen	
06/27/2023	01/01/2022	12/31/2022	Adams	11/21/2022	Perik, Karen	
06/27/2023	01/01/2022	12/31/2022	Adams	03/07/2022	Perik, Karen	
06/27/2023	01/01/2022	12/31/2022	Adams	02/04/2022	Schiferl, Erin	
06/27/2023	01/01/2022	12/31/2022	Adams	12/13/2022	Perik, Karen	
06/27/2023	01/01/2022	12/31/2022	Adams	01/28/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	09/06/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	03/15/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	09/19/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	05/25/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	12/06/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	04/27/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	05/26/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	10/12/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	02/08/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	01/12/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	12/14/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	08/30/2022		
06/27/2023	01/01/2022	12/31/2022	Adams	11/01/2022		

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.

3. To **Rename a Sheet**, you can use one of two options:

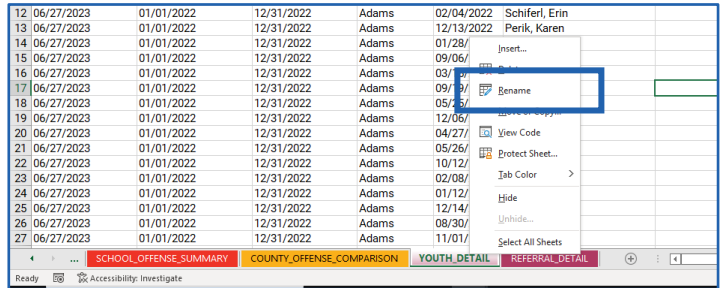
3a. Double click on the name of the sheet you want to rename. A cursor will appear in the sheet name. Once you have entered the new name, click anywhere on the sheet to update.

3a



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.

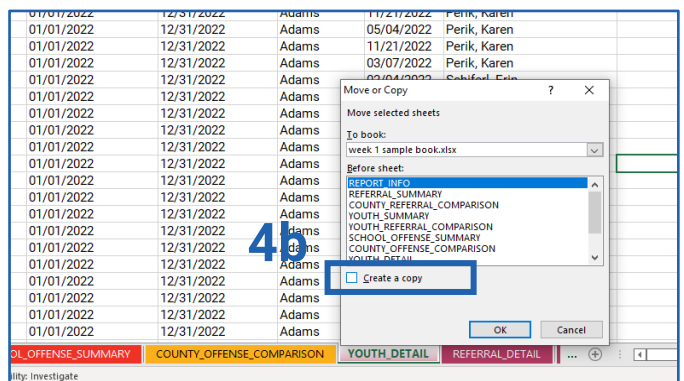
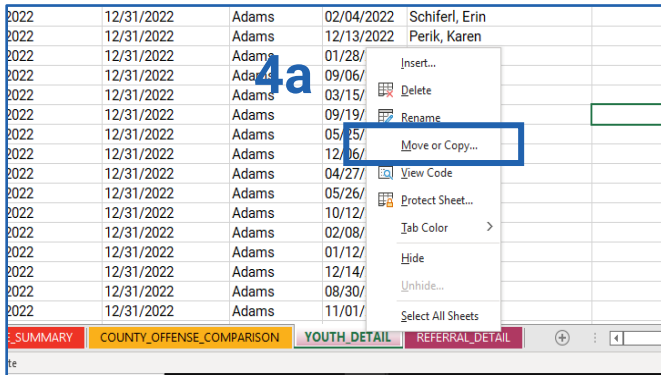
3b



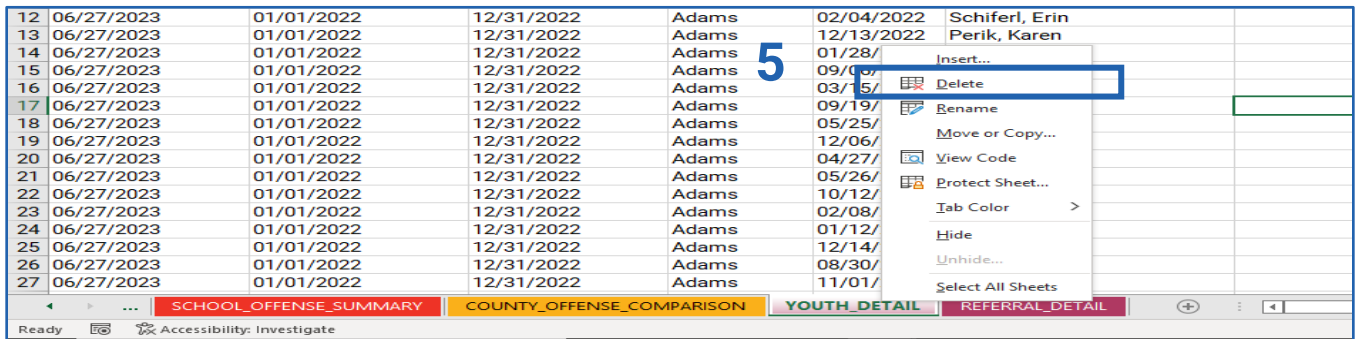
4. **Copy a Sheet.**

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.

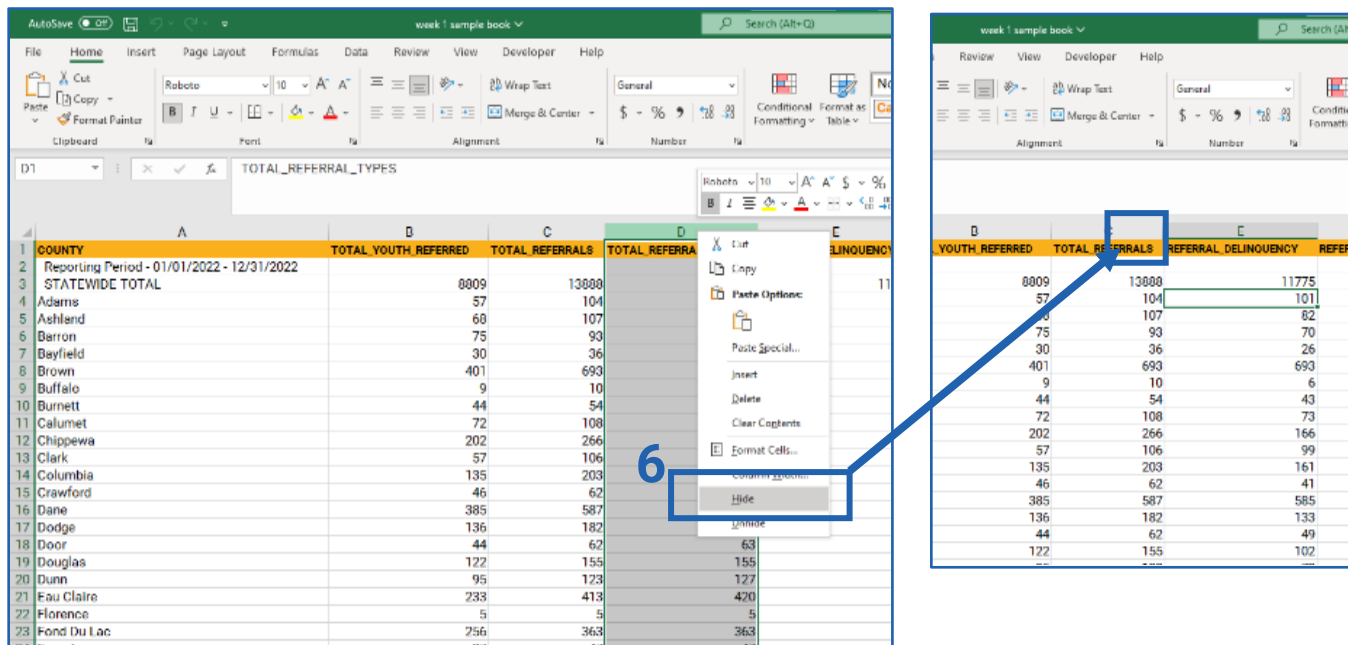


5. To **Delete a Sheet**, right click on the sheet you would like to remove. In the menu that pops up, select "delete."

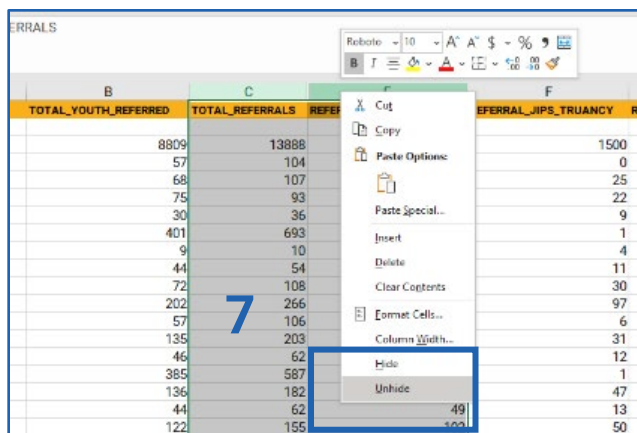


Hide and Unhide Columns and Rows

- 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.

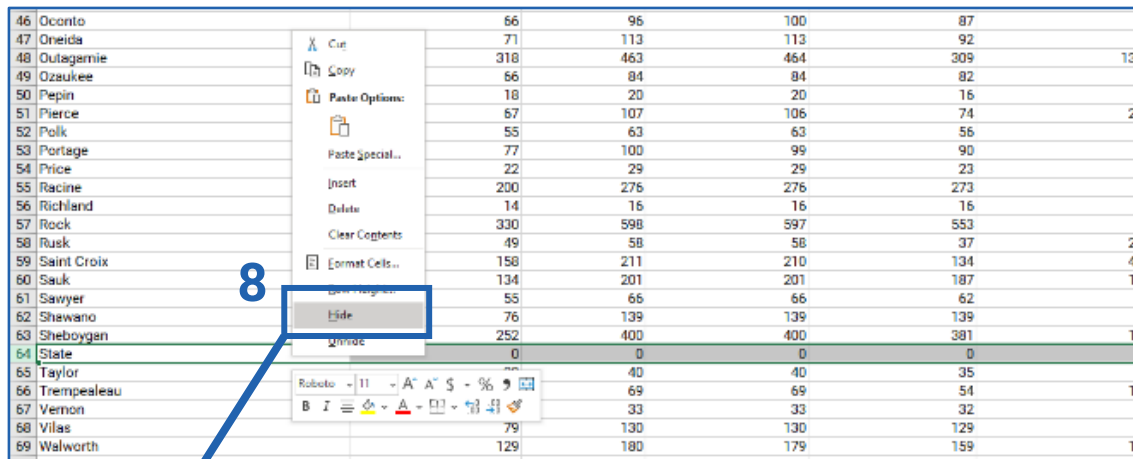


- To **Unhide a Column**, select the names of the columns directly to the right and left of the column you want to unhide and right click – both columns should now be highlighted. In the menu that pops up, select “unhide.” The column that was hidden should now re-appear.



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.

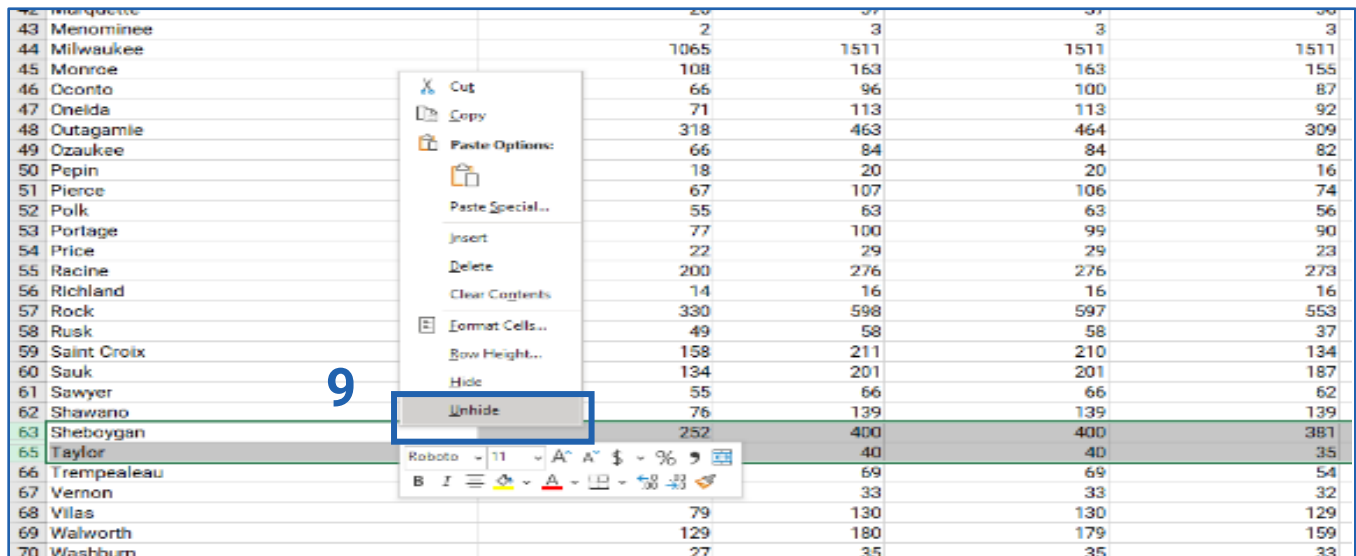
- To **Hide a Row**, right click on the name of the row you want to hide – the entire row should now be highlighted. In the menu that pops up, click “hide.” The height of the row will now shrink so it is no longer visible.



50	Pepin	18	20	20
51	Pierce	67	107	106
52	Polk	55	63	63
53	Portage	77	100	99
54	Price	22	29	29
55	Racine	200	276	276
56	Richland	14	16	16
57	Rock	330	598	597
58	Rusk	49	58	58
59	Saint Croix	158	211	210
60	Sauk	134	201	201
61	Sawyer	55	66	66
62	Shawano	76	139	139
63	Sheboygan	252	400	400
65	Taylor	33	40	40
66	Trempealeau	55	69	69
67	Vernon	26	33	33
68	Vilas	79	130	130
69	Walworth	129	180	179

TIP: You can select multiple 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.

- 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.



Freeze and Unfreeze Columns and Rows

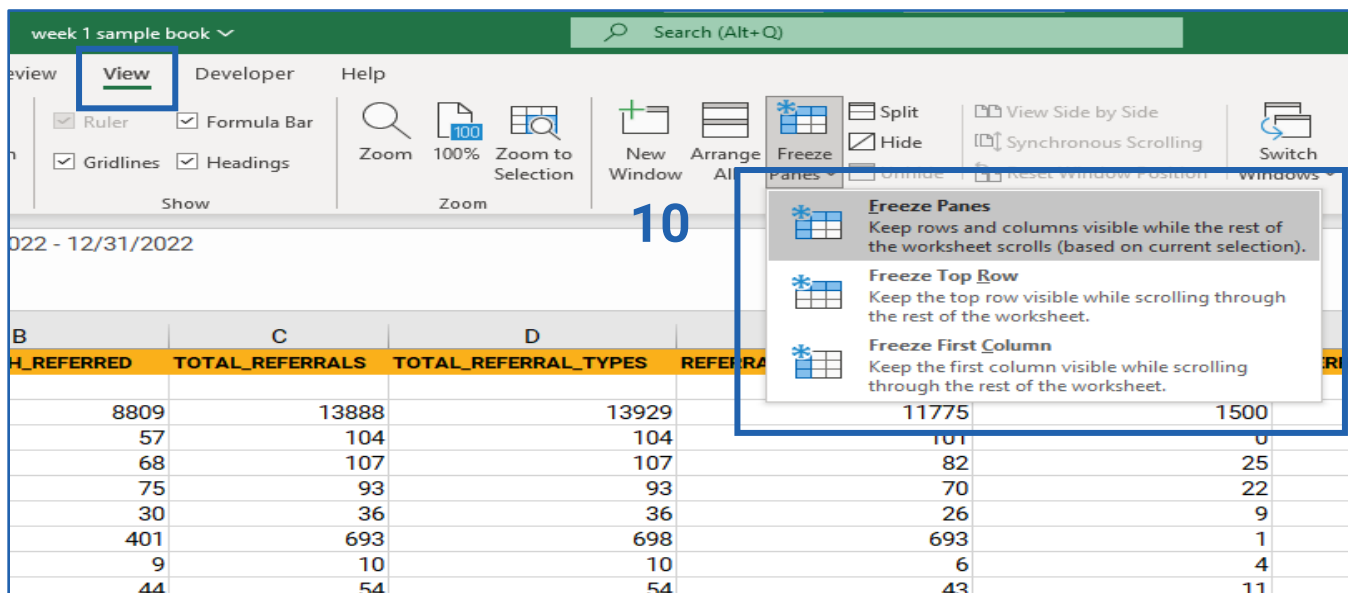
10. To **Freeze a Column or Row**, navigate to the “View” Ribbon and find the “Window” group. Click on the “Freeze Panes” button.

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.



10a

	A	B	C
1	COUNTY	TOTAL_YOUTH_REFERRED	TOTAL_REFERRALS
71	Washington		232
72	Waukesha		409
73	Waupaca		76
74	Waushara		33
75	Winnebago		391
76	Wood		262
77			

10b

	A	J	K
1	COUNTY	LOCATION_COMMUNITY	LOCATION_DETENTION_C
2	Reporting Period - 01/01/2022 - 12/31/2022		
3	STATEWIDE TOTAL	6480	
4	Adams	30	
5	Ashland	43	
6	Barron	25	
7	Bayfield	6	
8	Brown	349	
9	Buffalo	6	
10	Burnett	18	

10c

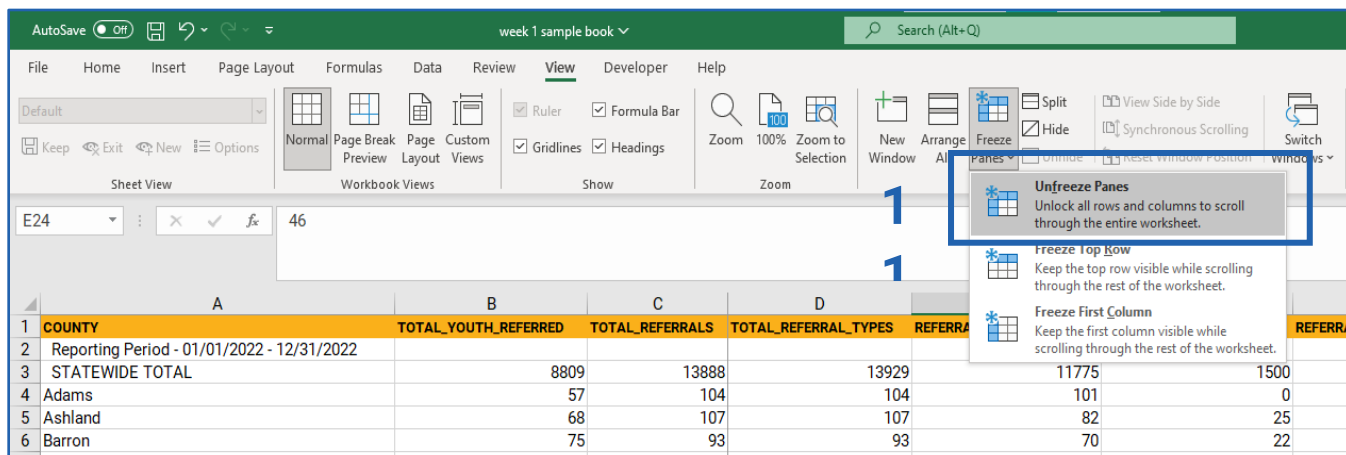
	A	B	C
1	COUNTY	TOTAL_YOUTH_REFERRED	TOTAL_REFERRALS
2	Reporting Period - 01/01/2022 - 12/31/2022		
3	STATEWIDE TOTAL	8809	
67	Vernon	26	
68	Vilas	79	
69	Walworth	129	
70	Washburn	27	
71	Washington	232	
72	Waukesha	409	
73	Waupaca	76	
74	Waushara	33	
75	Winnebago	391	
76	Wood	262	
77			

10d

	A	B	C	R
1	COUNTY	TOTAL_YOUTH_REFERRED	TOTAL_REFERRALS	DECISION_FORMAL_PETITION
2	Reporting Period - 01/01/2022 - 12/31/2022			
3	STATEWIDE TOTAL	8809	13888	5139
4	Adams	57	104	15
5	Ashland	68	107	50
6	Barron	75	93	18
7	Bayfield	30	36	2
8	Brown	401	693	252

NOTE: Black lines added for emphasis. A slightly darker gray line will display below the frozen row or to the right of the frozen column.

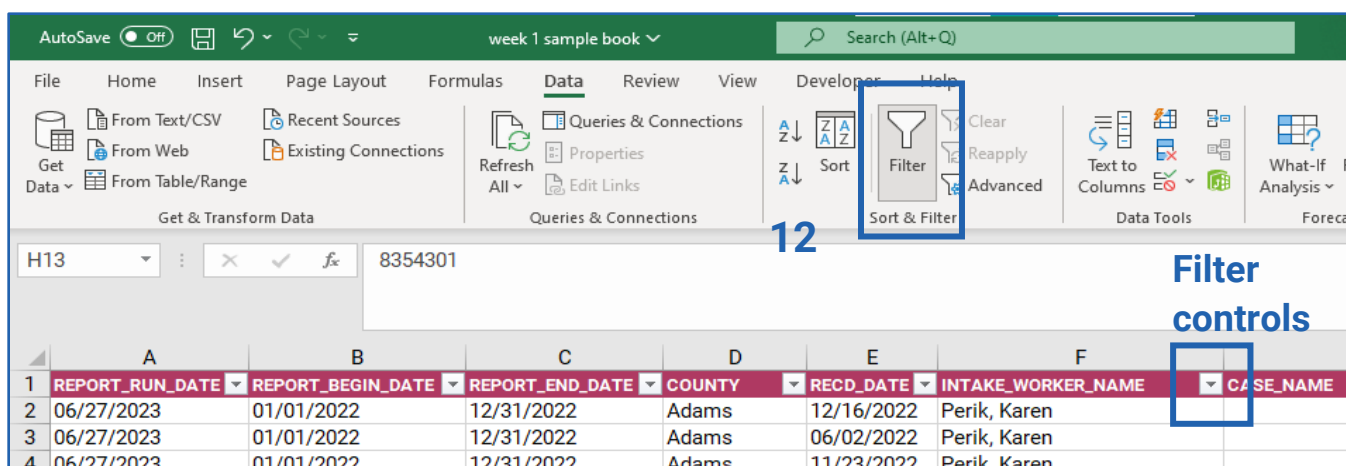
11. To **Unfreeze a Pane**, navigate to the “Freeze Panes” button and select “Unfreeze Panes.” The option to unfreeze a pane will only display when there is something to unfreeze.



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

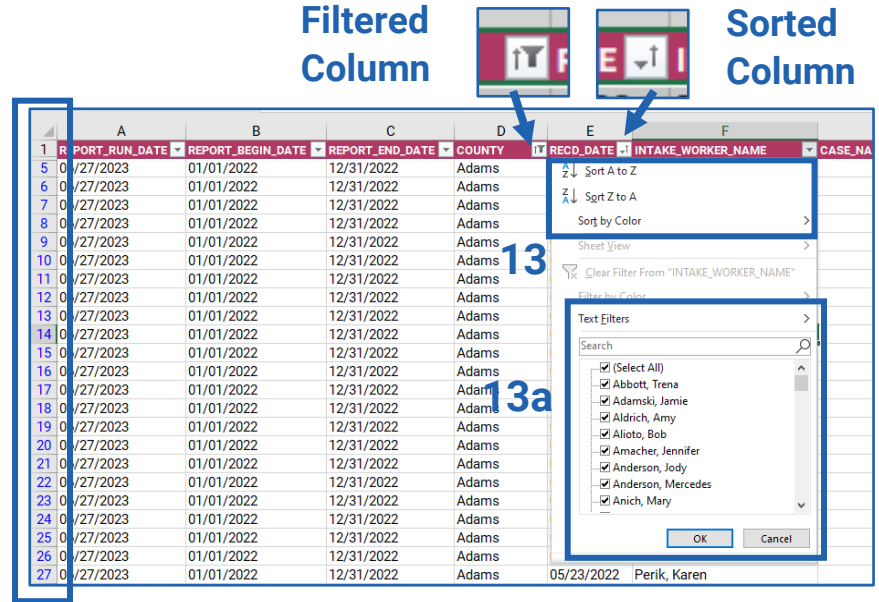
12. To **Turn on Filters**, navigate to the “Data” Ribbon and then click on the “Filter” button. When the filter is turned on, little arrows (filter controls) will appear in the table headers.



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.

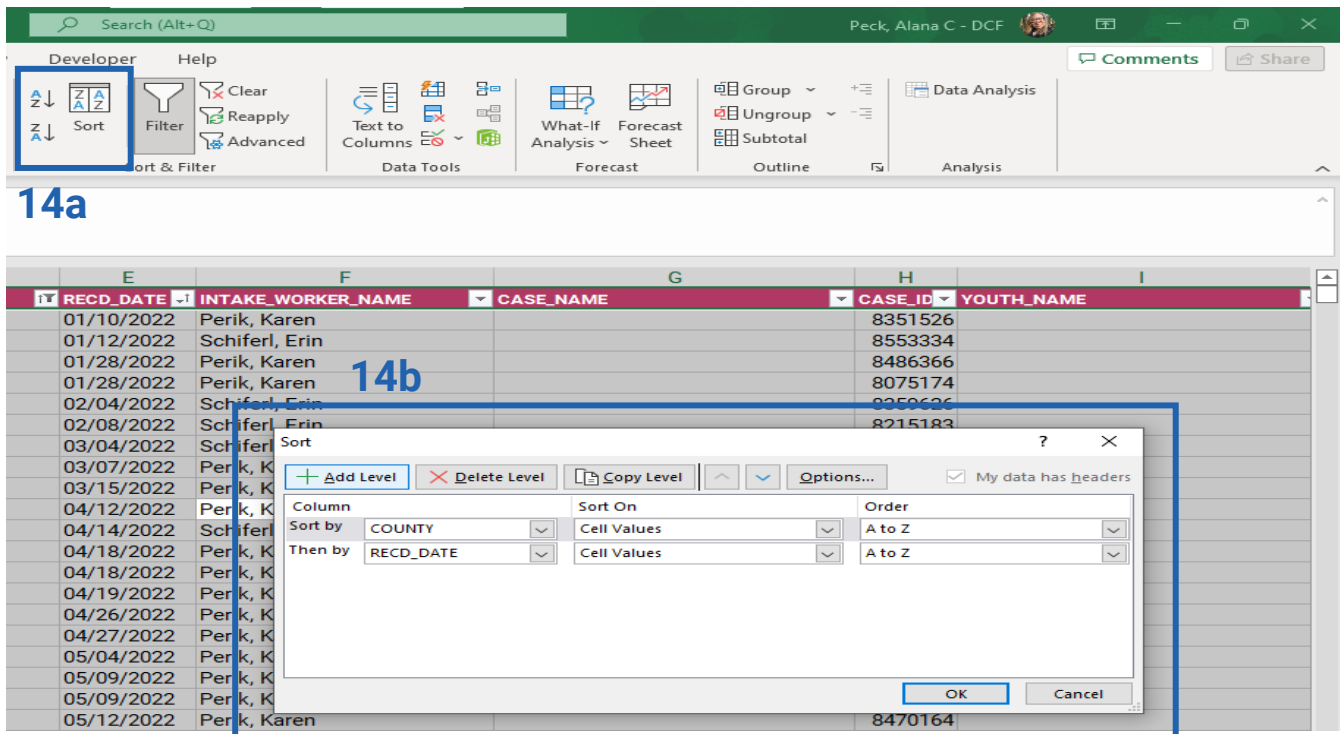
13b. To sort a column, use one of the options at the top of the menu, then click ok. When a column is sorted, an arrow corresponding with the option selected will appear in the box next to the column heading.



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.



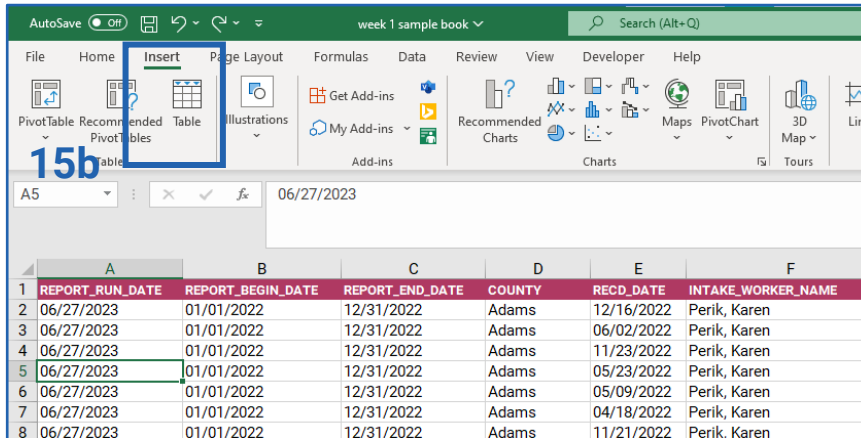
Create a Table

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

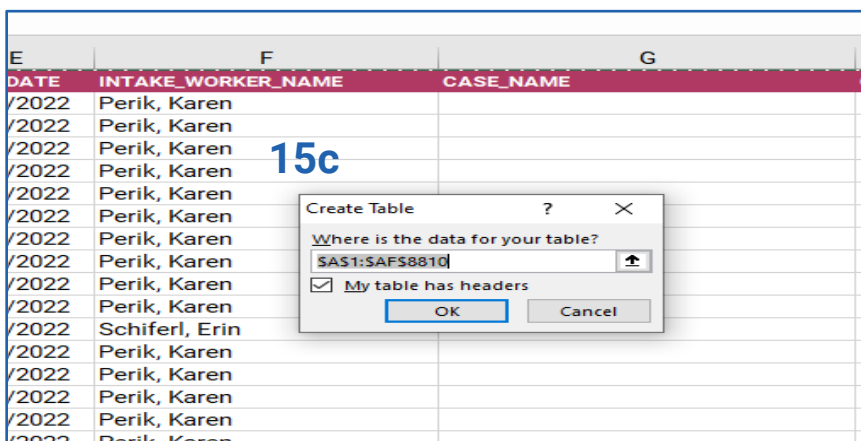
- consistently formatted and
- don't have lots of blank rows or columns.

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



15b. To **insert a table**, click on any cell in the sheet. Then, in the “Insert” Ribbon, click the “Table” button.

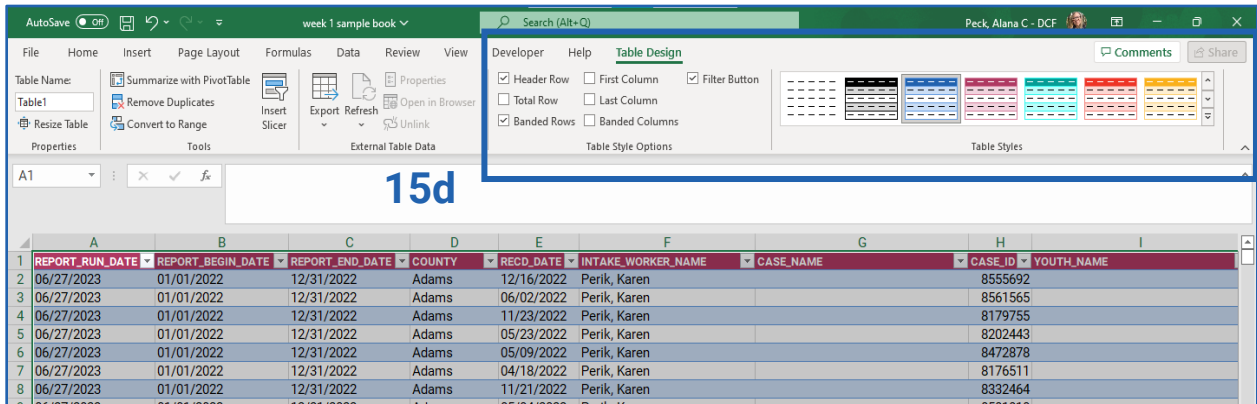
15c. A dialog box will pop up asking you to **specify the range of your table**. Make sure “My table has headers” is checked. Then click ok. Voila – a new table should appear!



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!

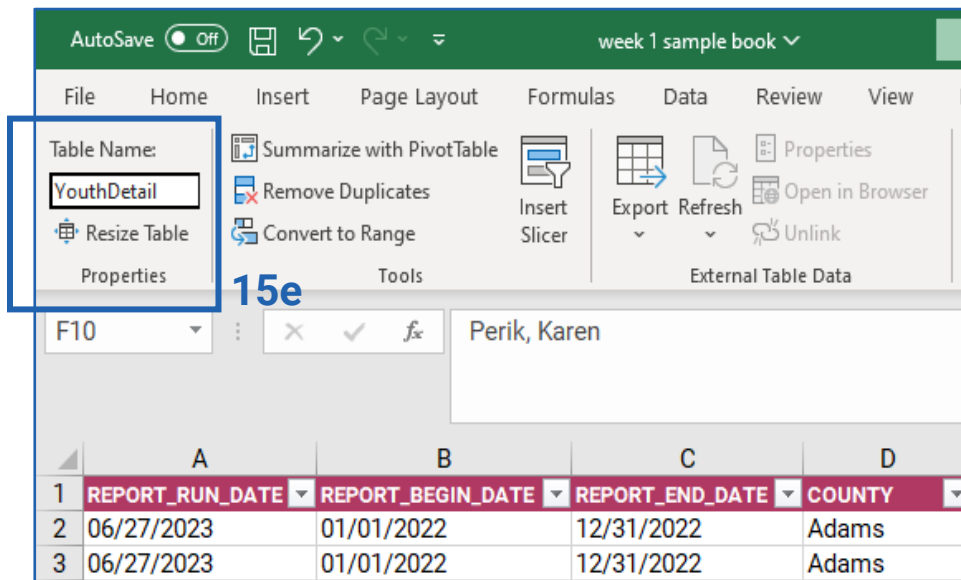
If you do accidentally click the screen and change the range, just hit cancel.

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.



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.



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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