

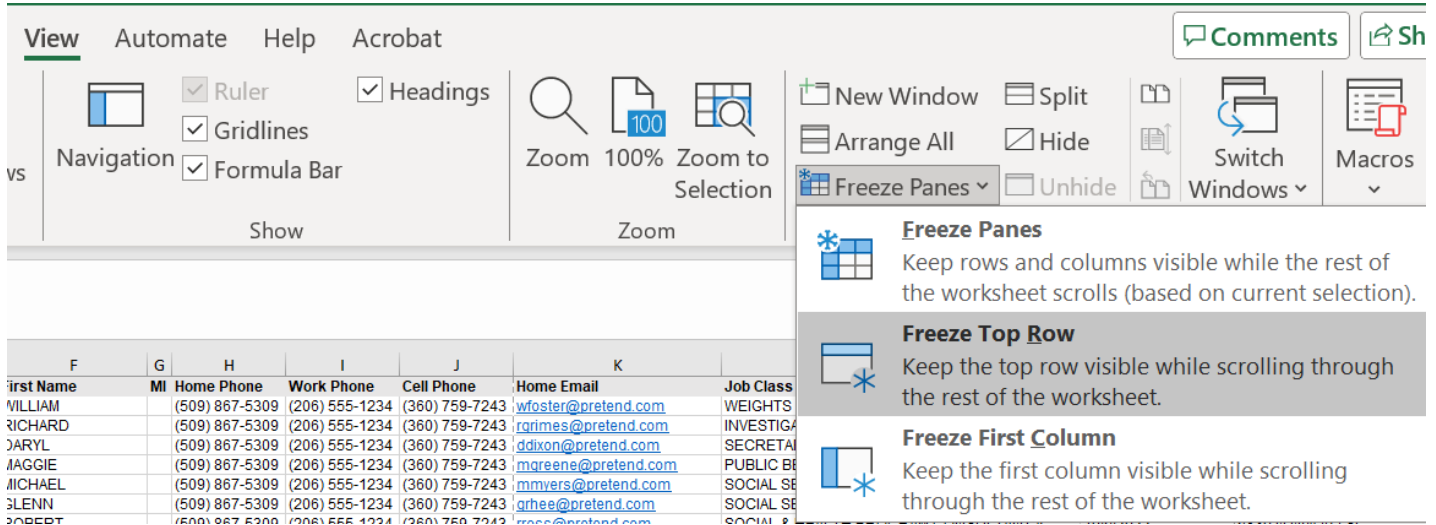
Dynamic Data: Manipulating Membership Reports

This follow-along guide takes you through some of the essential recommended steps in Excel to make your membership reports easier to interpret and take action on!

A) Freezing the Top Row

This step ensures that the column headers “follow” as you scroll down past the first screen’s worth of rows.

1. Click on View and then look in the Window section.
2. Click on Freeze Panes and select “Freeze Top Row”



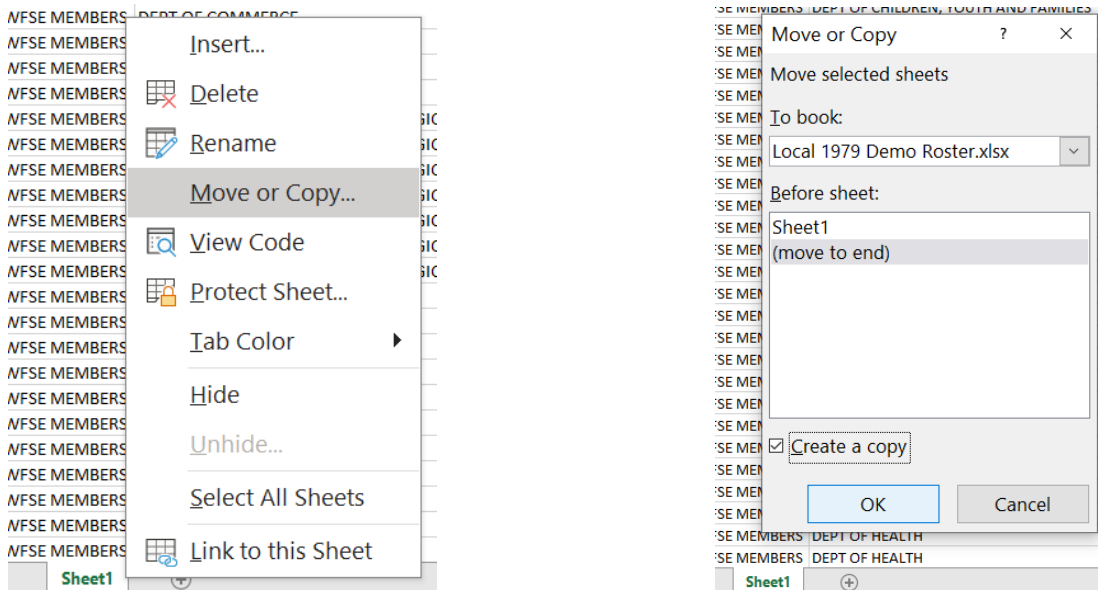
The screenshot shows the Excel ribbon with the 'View' tab selected. The 'Freeze Panes' dropdown menu is open, and 'Freeze Top Row' is highlighted. Below the ribbon, a portion of a membership report table is visible.

First Name	MI	Home Phone	Work Phone	Cell Phone	Home Email	Job Class
WILLIAM		(509) 867-5309	(206) 555-1234	(360) 759-7243	wfoster@pretend.com	WEIGHTS
RICHARD		(509) 867-5309	(206) 555-1234	(360) 759-7243	rgimes@pretend.com	INVESTIGA
JARYL		(509) 867-5309	(206) 555-1234	(360) 759-7243	ddixon@pretend.com	SECRETAR
MAGGIE		(509) 867-5309	(206) 555-1234	(360) 759-7243	mgreene@pretend.com	PUBLIC BE
MICHAEL		(509) 867-5309	(206) 555-1234	(360) 759-7243	mmvrs@pretend.com	SOCIAL SE
GLENN		(509) 867-5309	(206) 555-1234	(360) 759-7243	grhee@pretend.com	SOCIAL SE
ROBERT		(509) 867-5309	(206) 555-1234	(360) 759-7243	robert@pretend.com	SOCIAL S

B) How to Copy & Rename a Sheet

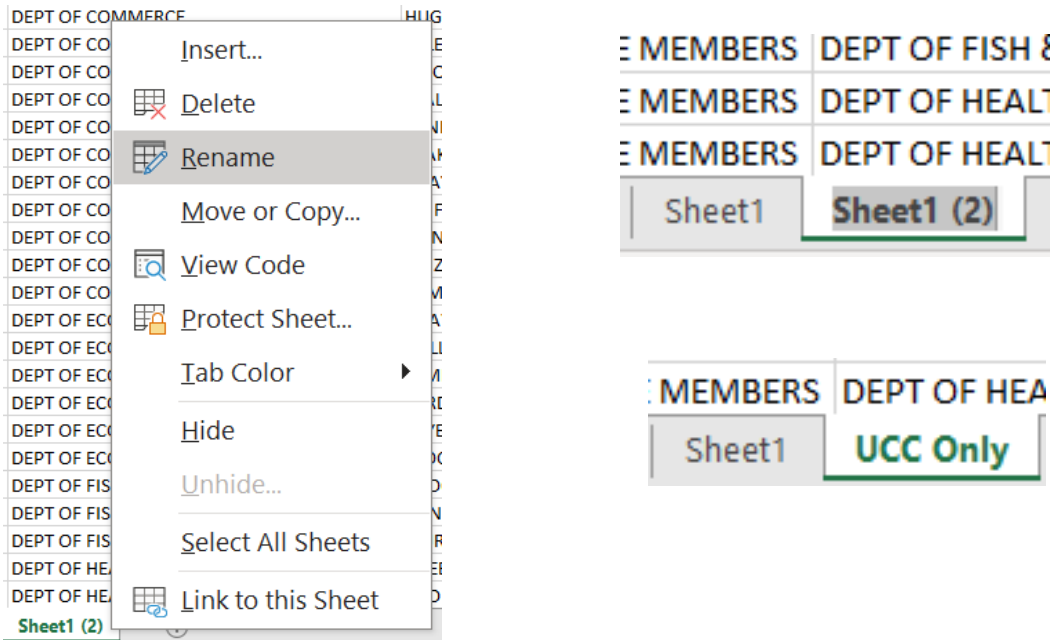
This is recommended before you start manipulating data so you can always go back a step or to your original report.

1. Right click on “Sheet 1” and select Move or Copy.
2. Select “(move to end)”, making sure to **select** “Create a copy.”



The first screenshot shows a right-click context menu over a sheet tab labeled 'Sheet1'. The 'Move or Copy...' option is highlighted. The second screenshot shows the 'Move or Copy' dialog box. The 'To book:' dropdown is set to 'Local 1979 Demo Roster.xlsx'. Under 'Before sheet:', 'Sheet1 (move to end)' is selected. The 'Create a copy' checkbox is checked.

- Then, right click on "Sheet1 (2)" to bring up the Rename option (or simply double-click "Sheet1(2)").
- Either way, the old name will be selected. Type in the new name. Here, we plan to isolate one agency (the fictional Unity Community College), so we are titling the sheet "UCC Only".



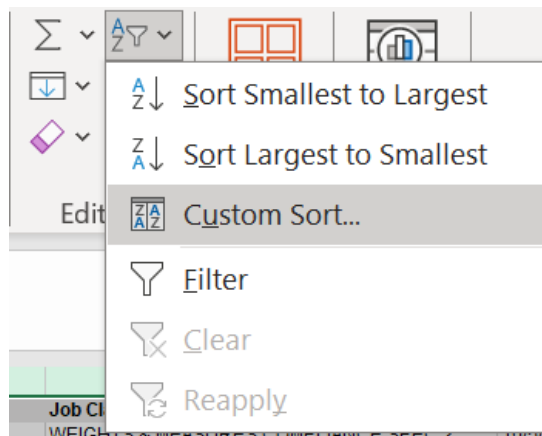
C) How to Sort by a Single Column

This step is how we will isolate the agency we want to look at (in this case, UCC).

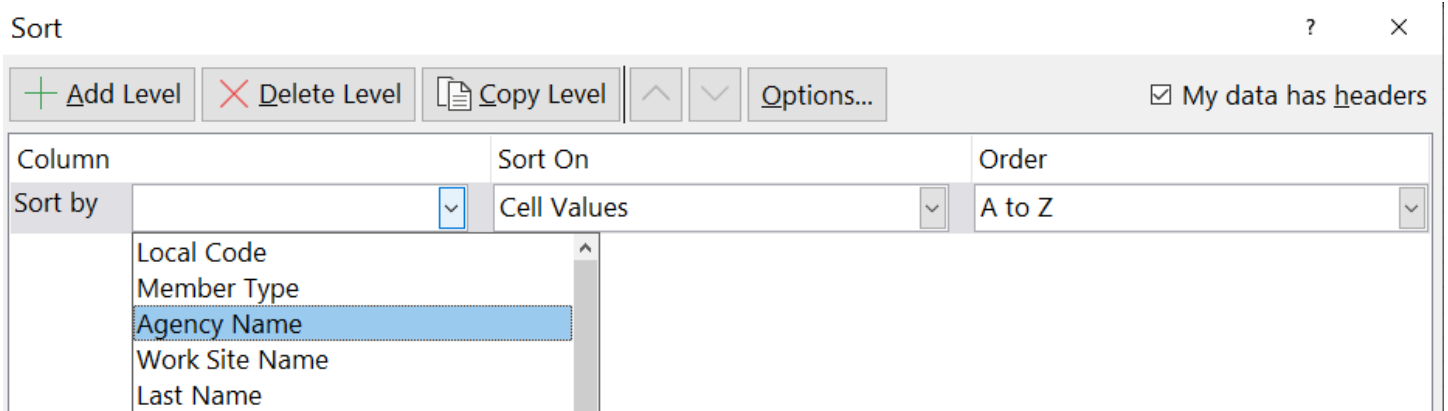
- Select the whole sheet using the triangle in the upper left corner.

	A	B	C
1	Local Code	Member Type	Agency Name
2	1979	WFSE Member	DEPT OF AGRICULTURE
3	1979	WFSE Member	DEPT OF AGRICULTURE
4	1979	WFSE Member	DEPT OF CHILDREN, YOUTH AND FAMILIES
5	1979	WFSE Member	DEPT OF CHILDREN, YOUTH AND FAMILIES
6	1979	WFSE Member	DEPT OF CHILDREN, YOUTH AND FAMILIES
7	1979	WFSE Member	DEPT OF CHILDREN, YOUTH AND FAMILIES
8	1979	WFSE Member	DEPT OF CHILDREN, YOUTH AND FAMILIES
9	1979	WFSE Member	DEPT OF CHILDREN, YOUTH AND FAMILIES
10	1979	WFSE Member	DEPT OF COMMERCE

- Go to the Sort icon in the Editing panel.
- Select Custom Sort.



- In "Sort By", select **Agency Name**. Select A to Z if not already set. **Make sure "My data has headers" is checked.**
- Click OK.

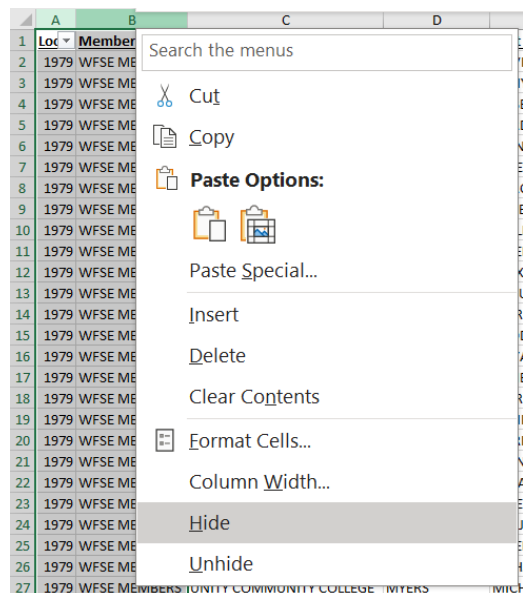


Now you have everyone from the same agency (in our example, Unity Community College) together. Delete everyone else and now this tab is finished – UCC Only!

D) How to Hide Columns & Other Space-Saving Formatting

This step lets us focus on important info and also protect member data so we're sharing the minimum necessary.

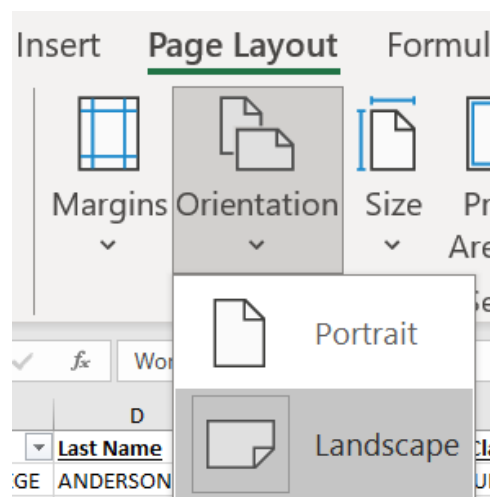
- Select the columns you wish to hide.
- Right click and choose "Hide".



- Usually Landscape (as opposed to Portrait) orientation will serve our purposes better and let us see more columns at once. Go to Page Layout / Orientation and then choose Landscape.

- Then go to Margins (next door to Orientation) and choose the narrowest ones that your printer allows.

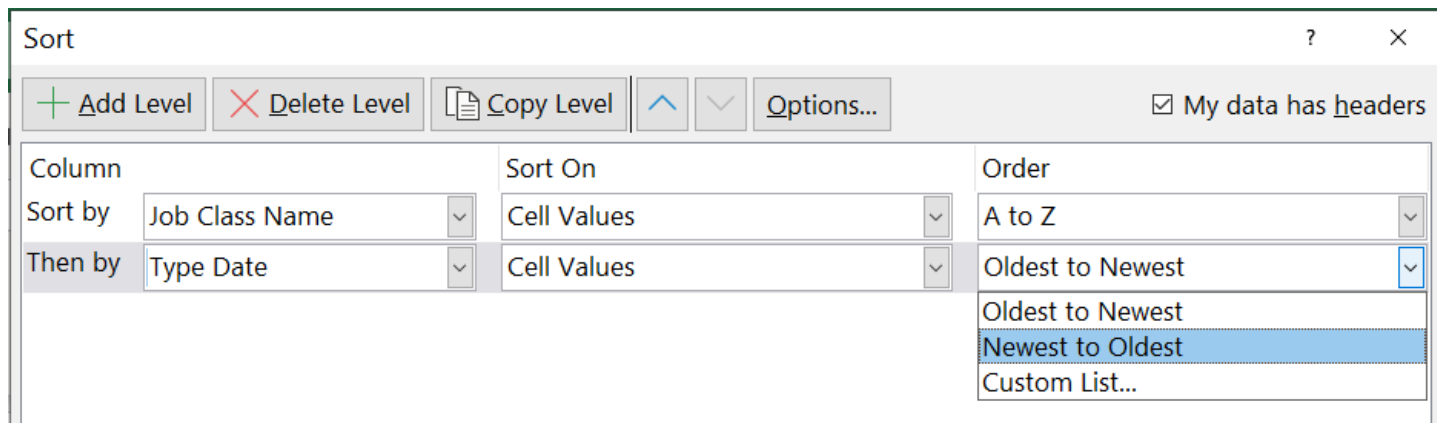
- Finally, double-click all the columns so they take up less horizontal space!



E1) How to Sort by Multiple Columns (Job Class & Type Date) - Es

Now this is where it gets fun – and, you guessed it, dynamic! Sorting by more than one column gives us much more actionable data. This sorting is recommended as a first step towards looking at your Es.

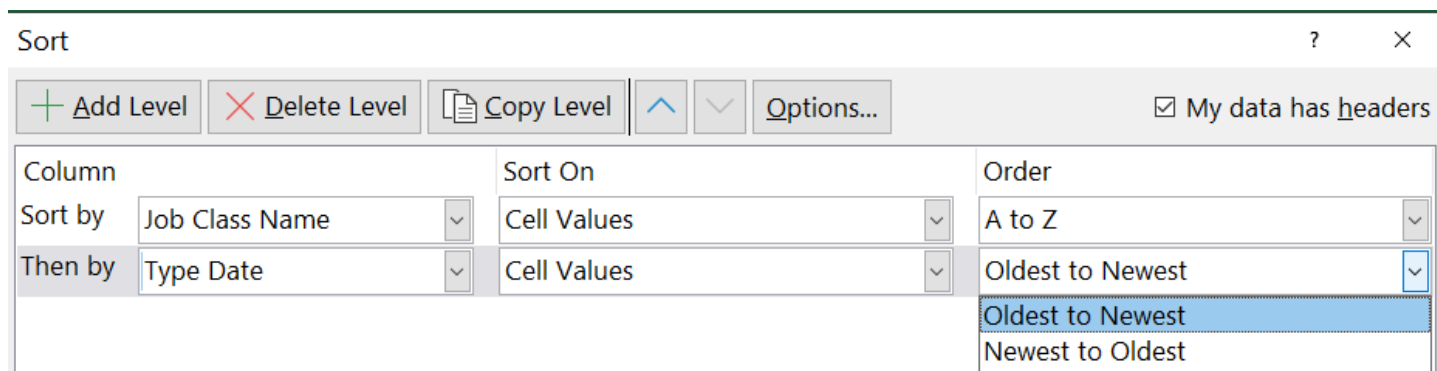
- 1-3. Follow the same steps as C) How to Sort by a Single Column.
4. In “Sort By”, select **Job Class Name** – A to Z.
5. Then select **Type Date** – Newest to Oldest.
6. Click OK.



E2) How to Sort by Multiple Columns (Job Class & Type Date) - Members

It can be smart to pair your E-list with your Members list. The process is almost the same, except for Type Date.

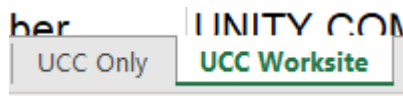
- 1-4. Follow the same steps as E1) How to Sort by Multiple Columns.
5. But in **Type Date**, select Oldest to Newest.
6. Click OK.



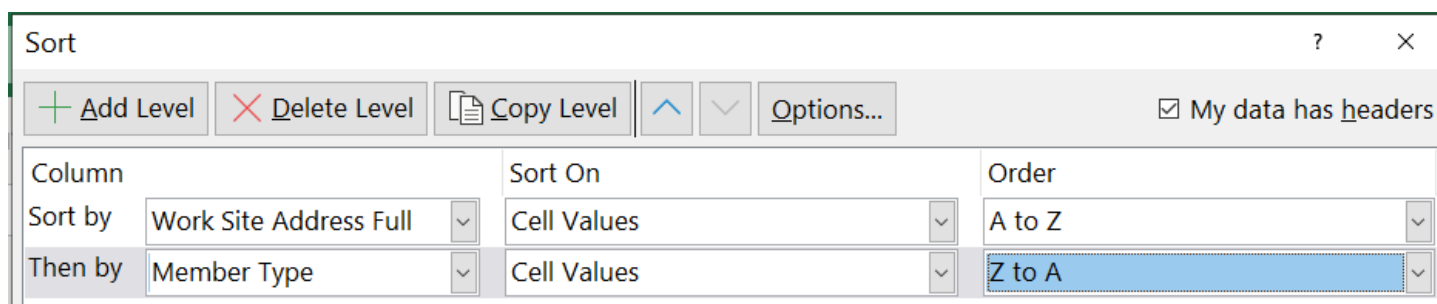
F1) How to Sort by Multiple Columns - “Member Strength”

Sometimes you’re more concerned about what’s happening at worksite – where your numbers are highest and lowest - than what is happening in a job class (though it is certainly possible to combine both). Here’s how:

1. Copy your specific agency tab at the bottom and retitle it with “Worksite” or “Member Strength”.



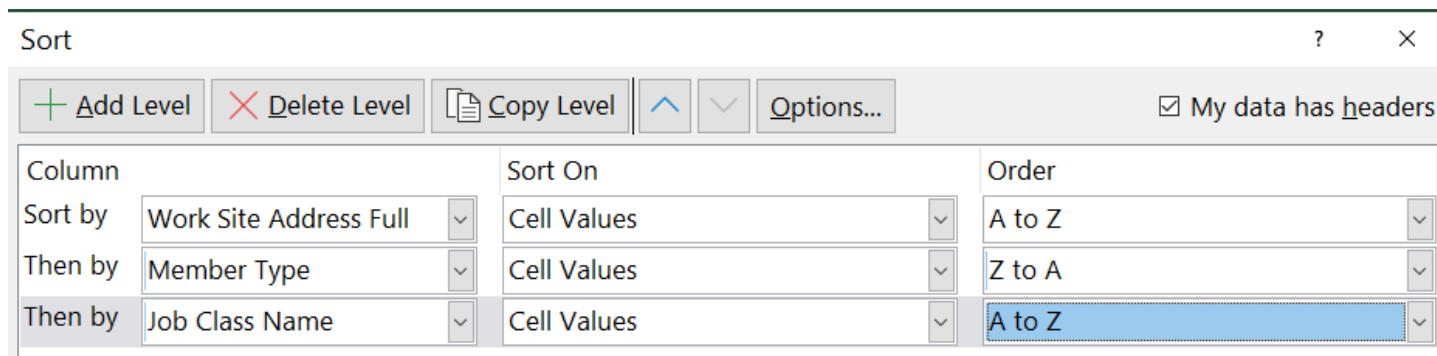
2. Select your entire sheet using the triangle in the upper-left corner.
3. Go to Sort and then Custom Sort.
4. This time, choose “Work Site Address Full” as your first criteria (A to Z)
5. And then **Member Type** (Z to A – this will put your “WFSE Members” at the top of each subsection).
6. Click OK.



Now you’ll be able to see which worksites have a concerning number of Es compared to WFSE Members, and act appropriately.

F2) How to Sort by Multiple Columns – Worksite (“Member Strength”) + Job Class

You can even get really sophisticated and add “Job Class Name” to your sorting:



Allowing you to see which job classes at which worksites are more and less represented!