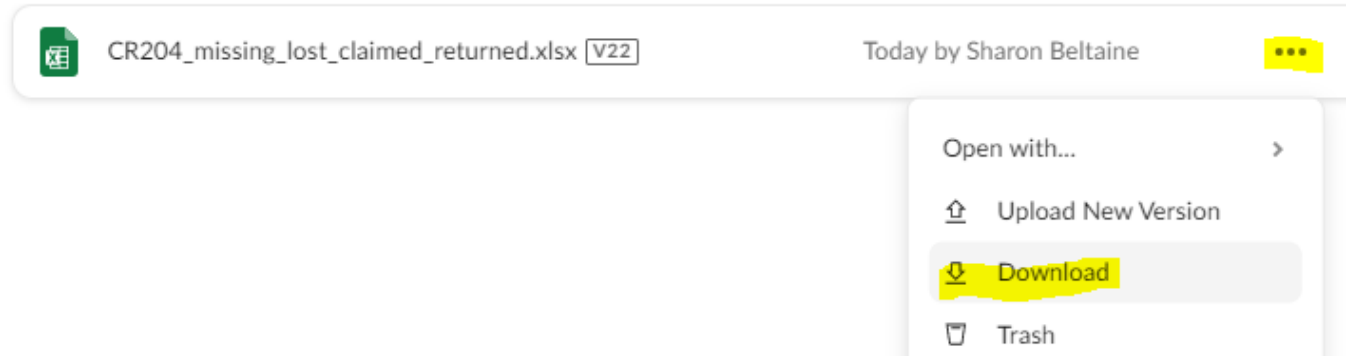


Filtering and Sorting Data in Excel Downloads - Detailed Instructions

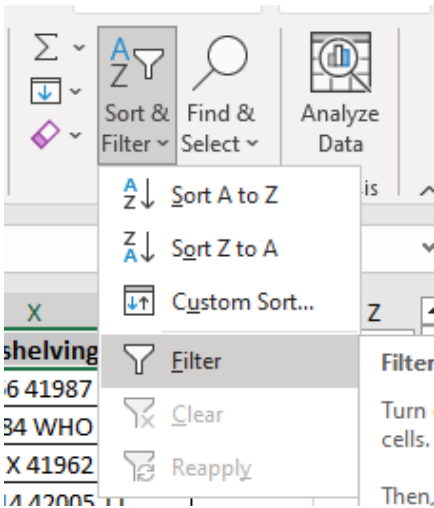
1 - Download your Excel file to your computer. Click on the link to open the file location in Box. You may be prompted to log in to Box. In Box, click on the ellipsis to the right of the file you want to download. Choose Download from the drop-down menu. Open the file in Excel from its download location on your computer.



2 - Select all the data fields in the first row of your spreadsheet.

| U | V | W | X |
|-----------------|---------------|------------------|--------------------------|
| user_first_name | patron_status | most_recent_loan | effective_shelving_order |
| | - | | NC 3782 S66 41987 11 |
| ... | ... | ... | ... |

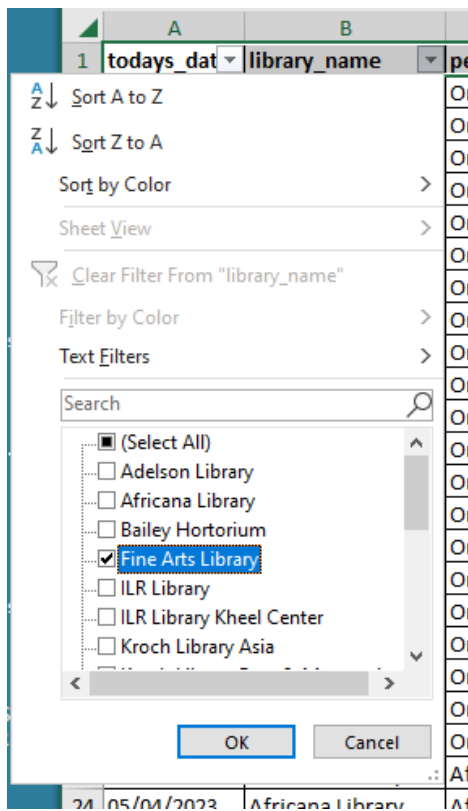
3 - From the Home toolbar, choose Filter from the Sort & Filter menu. This allows you to filter the data in the spreadsheet by column.



4 - You will now see that each column heading includes a downwards-pointing arrow. Each column heading can be used as a filter for the data in your spreadsheet.

| | |
|--------------|-------------------------|
| library_name | permanent_location_name |
|--------------|-------------------------|

5 - To filter your data, find the column heading for the data you want to filter. Click on it, click the Select All checkbox to deselect all the data, and select the checkboxes next to the fields for the data you want to see. The rest will be filtered out.



6 - You can filter the data for multiple columns by repeating this process. Keep in mind that with each subsequent filter, you are filtering the *filtered* data.

7 - To save the filtered dataset, copy all the rows and columns of data in your filtered results and paste them into a new worksheet or a new spreadsheet file.

8 - This is your copy of the file, so you can tailor it to your needs as you wish, such as removing columns, creating additional worksheets, etc.