

## DOWNLOADING REPORTS IN EXCEL

Due to the tool in Beta Base that creates reports, header lines will need to be deleted and fields will need to be unmerged to sort the document. The below instructions will help you undo this formatting so you can sort the data you need.

Potential ways to sort information that could be useful to your alumnae chapter are:

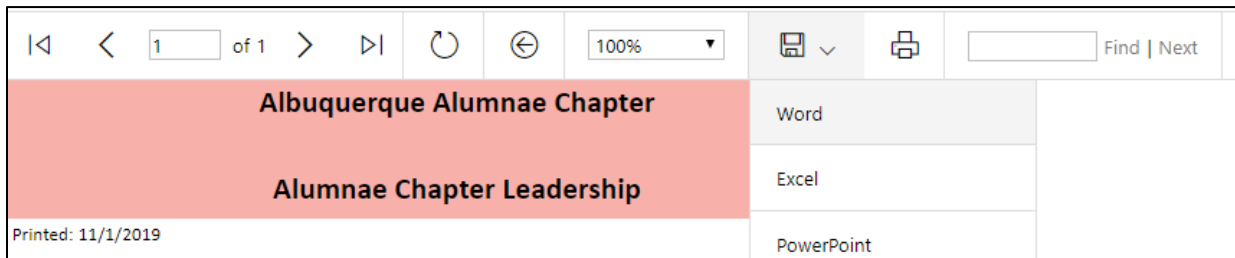
- By Initiation date to determine who qualifies for 50- and 75-year recognition.
- By Initiation date to find young alumnae in your area.
- By “Address Status” to see “LOST” members.
- By email address to find alumnae with valid email addresses.

### DOWNLOADING REPORTS FROM BETA BASE

1. Identify the report you wish to download from Beta Base by visiting Members, Leadership or Chapter Reporting > Reports.

*Tip: You might need to type a date range in which you submitted the report to see the information appear.*

2. Select the Save icon at the top of the report. Then select Excel.

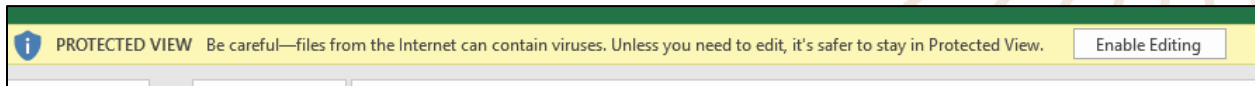


3. This will download a file to your computer. Once the file is finished downloading, you will be able to open the Excel document.

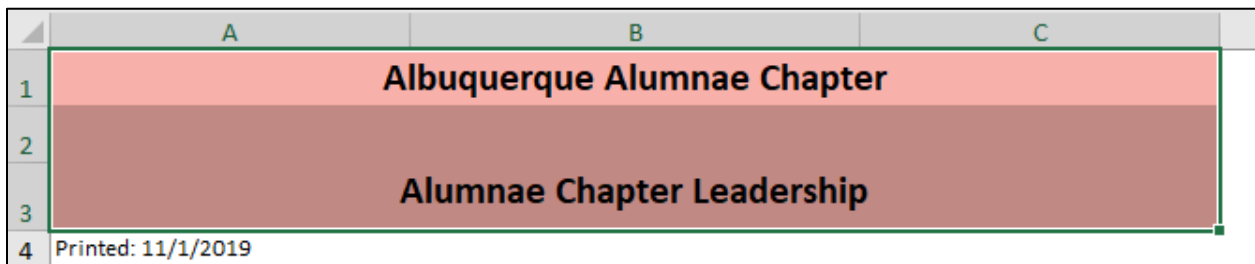
*Tip: If you have a pop-up blocker on your web browser, you might need to disable it.*

## CLEARING FORMATTING FROM REPORTS

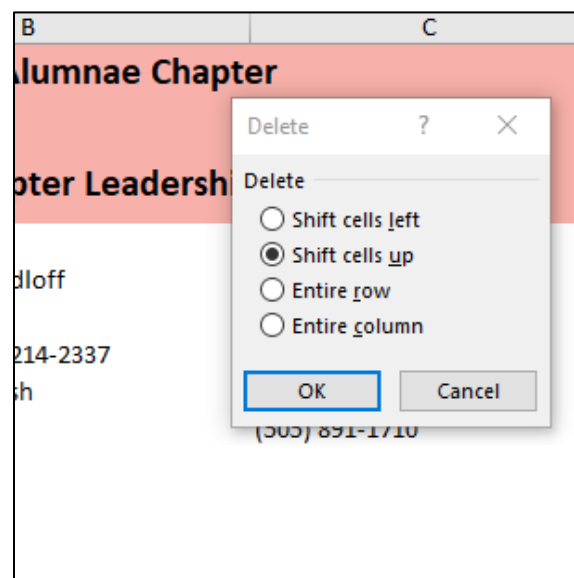
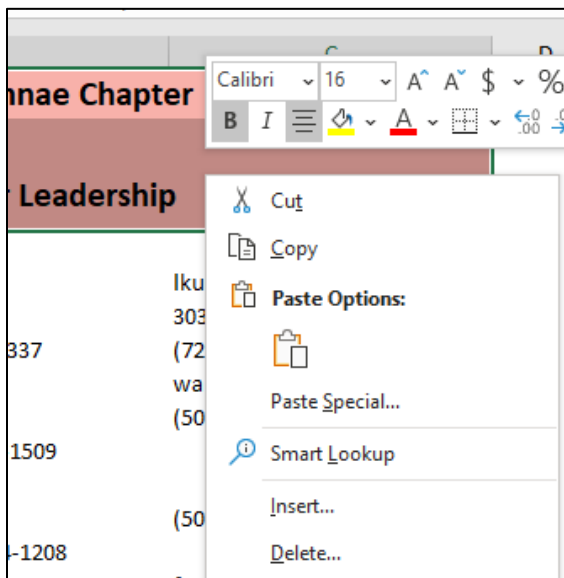
1. Select Excel from the export choices (see above). Be sure to choose Enable Editing or you will not be able to make changes to the spreadsheet.



2. Highlight the top row and click Shift on the keyboard and the down arrow at the same time to highlight all rows up to the pink header rows.



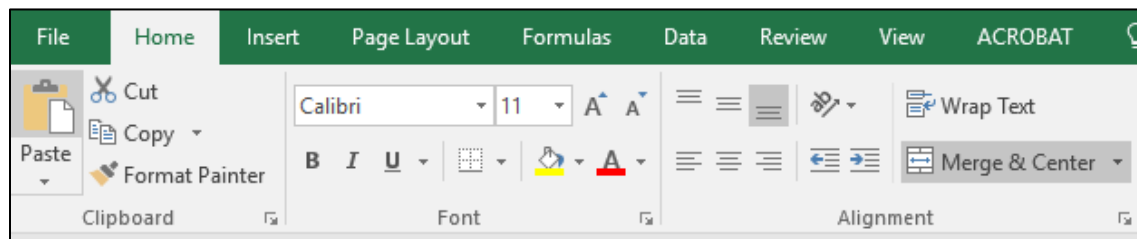
3. With your mouse, right-click on the highlighted cells. Select Delete. Then, Shift Cells Up and OK.



- Once you have the header rows deleted, highlight the entire document by selecting the corner square at the top left-hand corner between A and 1.

	A	
1	Informal First Name	Last Name
2	Leigh Ann	Ku
3	Sharon	Wa

- Merge and Center will be highlighted at the top of Excel on the tool bar under Home. Click to un-highlight, and this will unmerge any merged fields in the document.

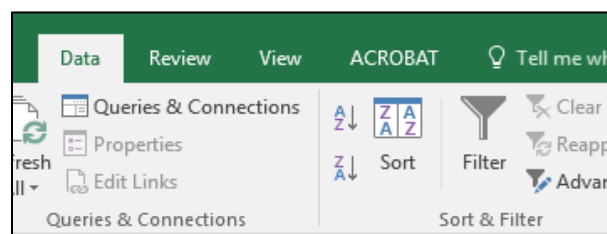


## SORTING THE DATA

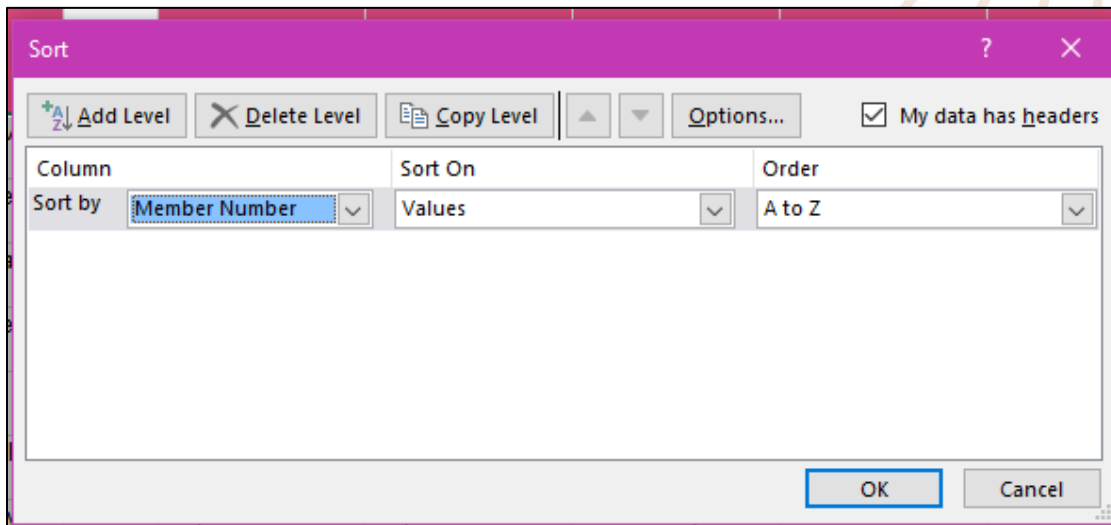
- To sort the document after unmerging, click on the corner square from above.

	A	
1	Informal First Name	Last Name
2	Leigh Ann	Ku
3	Sharon	Wa

- Click on Data on the top ribbon, and then Sort.



3. Check the box 'My data has headers' and click on the drop-down next to Sort by to choose how you want to sort. You can choose several levels of sorting by choosing Add Level. You can also delete a level by choosing Delete Level. Once you have chosen all of your sorting options, click OK. Your data will then be sorted how you selected it.



4. If you prefer, you can also choose to filter. Simply highlight the first row of the document and choose Filter. Select a drop-down and choose how you would like to sort.

