



# State Chapter Module

December 2022



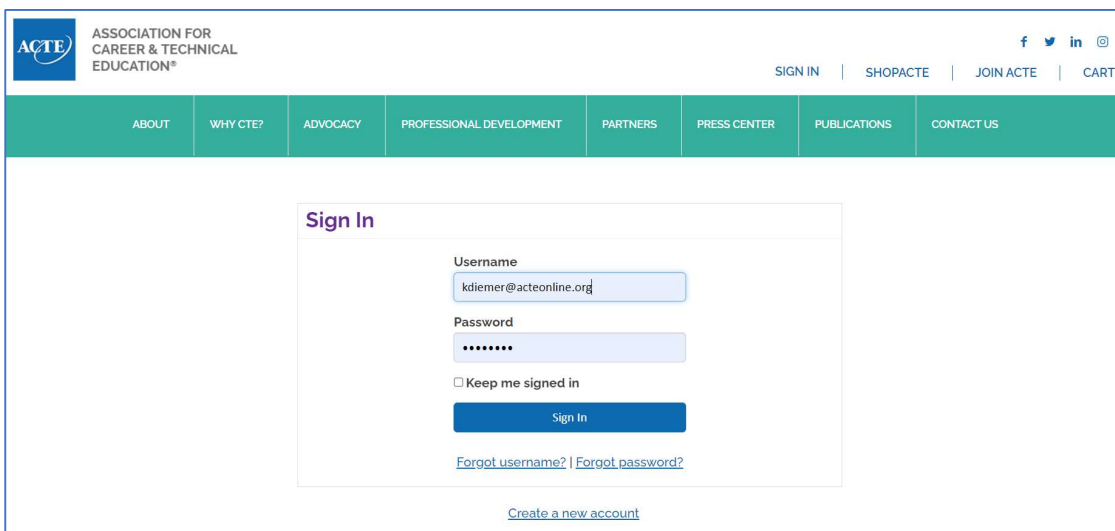
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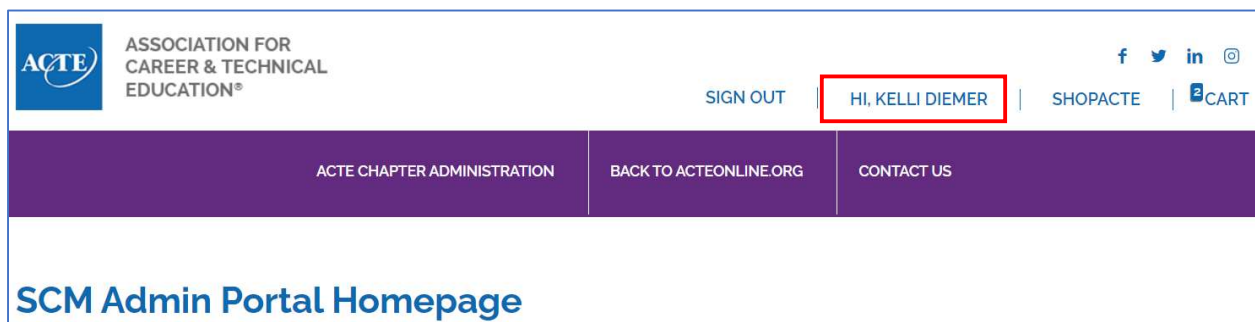
## Logging into SCM

Go to: [www.ACTEonline.org](http://www.ACTEonline.org) Log into your profile.



At least one State Administrator will be granted access to the State Chapter Module. This must be set up prior to gaining access to the state's membership information. Contact Dahlia Batres for information.

Open a second tab and go to <https://web.acteonline.org/scm>



## State Chapter Module Main Screen

Chapter-Sponsored Event Dashboards, as well as a list of Chapter Reports are available for viewing your state's membership information. This list describes each of the reports available.

Chapter-Sponsored Event Dashboards

## Chapter Reports

- **Current Members** - chapter members who are regarded as current active members of ACTE national as of today's date.
  - Additional reports show members who fall within a 30, 60, and 90-day grace period.
- **Financial Roster** - transactions with ACTE for all chapter members.
- **Historical Roster** - chapter members from all time regardless of their current ACTE national membership status.
- **Lapsed Members** - chapter members who have expired and exceeded the 90-day grace period.
- **New Members** - chapter members who have joined within the past 30, 60, or 90 days.
- **Renewals** - chapter members who have paid their renewal in the past 30, 60, or 90 days.
- **Roster Listings with No Email Address** - chapter contacts who have no email address on file in the ACTE national database.
- **Roster Listings with No Mailing Address** - chapter contacts who have missing or incomplete address data on the ACTE national database.
- **State members who attended ACTE national events** - shows a list of events that your state chapter members have attended. Click 'View Registrants' to view registration details about chapter members who attended the ACTE national event or State Support Event.

Select a report below. Then, you can use the **Export** button on the top right to export the list. You can click on a person's name to view and update their information.

The Selected Report dropdown menu lists all available reports.

## Chapter Reports

- **Current Members** - chapter members who are regarded as current active members of ACTE national as of today's date.
  - Additional reports show members who fall within a 30, 60, and 90-day grace period.
- **Financial Roster** - transactions with ACTE for all chapter members.
- **Historical Roster** - chapter members from all time regardless of their current ACTE national membership status.
- **Lapsed Members** - chapter members who have expired and exceeded the 90-day grace period.
- **New Members** - chapter members who have joined within the past 30, 60, or 90 days.
- **Renewals** - chapter members who have paid their renewal in the past 30, 60, or 90 days.
- **Roster Listings with No Email Address** - chapter contacts who have no email address on file in the ACTE national database.
- **Roster Listings with No Mailing Address** - chapter contacts who have missing or incomplete address data on the ACTE national database.
- **State members who attended ACTE national events** - shows a list of events that your state chapter members have attended. Click 'View Registrants' to view registration details about chapter members who attended the ACTE national event or State Support Event.

Select a report below. Then, you can use the **Export** button on the top right to export the list. You can click on a person's name to view and update their information.

Selected Report:

Full Name Contains

Member #

Find

Page: 1 of 5 Go Page size: 50 Change

Show all 216

| Id  | Last Name | Email | Address 1 | Address 2 | Address 3 | City | State | Province |
|---|-----------|-------|-----------|-----------|-----------|------|-------|----------|
| State members who attended ACTE national events |           |       |           |           |           |      |       |          |

Current Members

Dashboard Queries

Current Members

Current Members (only within 30 day grace period)

Current Members (only within 60 day grace period)

Current Members (only within 90 day grace period)

Financial Roster

Historical Roster

Lapsed Members

New Members (within 30 days)

New Members (within 60 days)

New Members (within 90 days)

Renewals (within 30 days)

Renewals (within 60 days)

Renewals (within 90 days)

Roster Listings with No Email Address

Roster Listings with No Mailing Address

State Financial Detail Report (ACH)

State members who attended ACTE national events



## Searching for Individual Records

You can also search for an individual by name or member number. You can also search for individuals by part of their name (i.e. Miller or George). This brings up individual members matching your criteria.

**Selected Report:**

Current Members

**Full Name Contains**

**Member #**

Find

To get more detail on an individual, choose their name. To edit parts of the individual's profile, choose the **pencil** in the appropriate section.

**To make allowable changes to data, click the pencil located in the upper right corner of the corresponding section.**

Bob Smith  
City High School

**Membership**

|                  |                     |              |                    |
|------------------|---------------------|--------------|--------------------|
| IMIS ID          | 000000              | Major key    |                    |
| Member type      | ACTE Member         | Status       | Active             |
| Billing category | Professional Member | Paid through | 2/29/2024          |
| Chapter          | XXXXX               | Member since | 3/1/2022           |
| Renewed          | 3/28/2022           | Last update  | 10/31/2022 9:18 AM |
| Last updated by  | BobSmith@gmail.com  | Date added   | 10/4/2018          |

Notice the preferred mailing, billing, and shipping is marked as either Main/Home or Work.



### Addresses

Work

Home

✓ Preferred Mailing Address

✓ Preferred Billing Address

✓ Preferred Shipping Address

### Personal details

Work phone

(111)111-1111

Mobile Phone

Home phone

Email

BobSmith@gmail.com

### Social profiles

There are no social profiles defined.

### Relationships

## State Chapter Module Reports

### Current Member Reports

Selected Report:

Current Members

Full Name Contains

Member #

Dashboard Queries

Current Members

Current Members (only within 30 day grace period)

Current Members (only within 60 day grace period)

Current Members (only within 90 day grace period)

#### 1. Current Members Report (includes the 90-day grace period)

The Current Members report gives you a list of all current members including those in the 90-day grace period. You can quickly see several columns of information (you may need to slide screen). By clicking on the column heading, the data sorts by the column information. The Current Members report can be exported as Excel, CSV, pdf, etc.

#### 2. Current Members (only within 30-day grace period)

The Current Members (only within 30-day grace period) does not list all members but only those in the 30-day grace period (expired within 1-30 days).

#### 3. Current Members (only within 60-day grace period)

The Current Members (only within 60-day grace period) does not list all members but shows those in the 60-day grace period (expired within 1-60 days).

#### 4. Current Members (only within 90-day grace period)

The Current Members (only within 90-day grace period) does not list all members but shows those in the 90-day grace period (expired with 1-90 days).



## State Financials

The Financial Roster is listed on the drop-down menu and shows financial transactions with dates.

### 1. Financial Roster

Selected Report: Current Members

Full Name Contains

Member #

Find

1 2 3 4 5

Show all 500

Last Name First Name

Dashboard Queries

- Current Members
- Current Members (only within 30 day grace period)
- Current Members (only within 60 day grace period)
- Current Members (only within 90 day grace period)
- Financial Roster**
- Historical Roster
- Lapsed Members
- New Members (within 30 days)
- New Members (within 60 days)
- New Members (within 90 days)
- Renewals (within 30 days)
- Renewals (within 60 days)
- Renewals (within 90 days)
- Roster Listings with No Email Address
- Roster Listings with No Mailing Address
- State members who attended ACTE national events

The Financial Roster report gives you the option of searching for transactions between dates or for a member (by membership number).

Selected Report: Financial Roster

Transaction Date Between

Member #

Find

1 2 3 4 5 6 7 8 9 10

Page: 1 of 10 Go Page size: 50 Change Item 1 to 50 of 500

Show all 500

| First Name | Last Name | Title | School/Business | Email | Description | Transaction Date | Amount Paid | Paid Thru |
|------------|-----------|-------|-----------------|-------|-------------|------------------|-------------|-----------|
|------------|-----------|-------|-----------------|-------|-------------|------------------|-------------|-----------|

### 2. The State Financial Detail Report

This report shows the transactions that make up the ACH deposit.

Selected Report: State Financial Detail Report (ACH)

Transaction Date Between

Member #

Find

1 2 3 4 5

Page: 1 of 4 Go Page size: 50 Change Item 1 to 50 of 185

Show all 185

| St.Id  | First Name | Last Name | Title | School/Business   | Email          | Description    | Transaction Date | Amount Paid | Paid Thru |
|--------|------------|-----------|-------|-------------------|----------------|----------------|------------------|-------------|-----------|
| 482406 | Michael    | Adams     |       | Delta High School | madams@dgsd.us | AK-Alaska ACTE | 10/4/2022        | \$45.00     | 2/29/2024 |
| 482406 | Michael    | Adams     |       | Delta High School | madams@dgsd.us | AK-Alaska ACTE | 3/28/2022        | \$45.00     | 2/28/2023 |



## Historical Roster

Records can be search by date, name, or member number. If more than one record comes up from search, data can be sorted by clicking on the column title.

Selected Report:

Historical Roster

Joined After

Full Name Contains

Member #

Find

Export

1

2

3

4

5

6

7

8

9

10

Page: 1 of 10 Go Page size: 50 Change

Show all 500

| <u>Id</u> | <u>Full Name</u> | <u>Title</u> | <u>School/Business</u> | <u>Email</u> | <u>Work Phone</u> | <u>Home Phone</u> | <u>Paid Through</u> | <u>Current Divisions</u> | <u>Address 1</u> |
|-----------|------------------|--------------|------------------------|--------------|-------------------|-------------------|---------------------|--------------------------|------------------|
|-----------|------------------|--------------|------------------------|--------------|-------------------|-------------------|---------------------|--------------------------|------------------|

## Lapsed Members

Anyone in our database that have expired past the 90 grace period window will appear on this list. Search for records by dates or member number. If more than one record comes up from search, data can be sorted by clicking on the column title.

Selected Report:

Lapsed Members

Paid Through Between

and

Member #

Find

Export

1

2

3

4

5

6

7

8

9

10

Page: 1 of 10 Go Page size: 50 Change

Show all 500

| <u>Id</u> | <u>First Name</u> | <u>Last Name</u> | <u>Title</u> | <u>School/Business</u> | <u>Email</u> | <u>Address 1</u> | <u>Address 2</u> | <u>Address 3</u> | <u>City</u> | <u>State</u><br><u>Province</u> |
|-----------|-------------------|------------------|--------------|------------------------|--------------|------------------|------------------|------------------|-------------|---------------------------------|
|-----------|-------------------|------------------|--------------|------------------------|--------------|------------------|------------------|------------------|-------------|---------------------------------|



## New Member Reports

Selected Report: Current Members

Full Name Contains

Member #

Find

Show all 500

Last Name First Name

Address 1 Address 2 Address 3 City State Province

Page: 1 of 10 Go Page size: 50 Change

Export

### 1. New Members (within 30 days)

The New Members report gives you a list of all new members who have joined in the last 30 days. You can quickly see several columns of information (you may need to slide screen). By clicking on the column heading, the data sorts by the column information.

### 2. New Members (within 60 days)

The New Members report gives you a list of all new members who have joined in the last 60 days. This list is inclusive and includes all new members who joined in the past 1-60 days. You can quickly see several columns of information (you may need to slide screen). By clicking on the column heading, the data sorts by the column information.

### 3. New Members (within 90 days)

The New Members report gives you a list of all new members who have joined in the last 90 days. This list is inclusive and includes all new members who joined in the past 1-90 days. You can quickly see several columns of information (you may need to slide screen). By clicking on the column heading, the data sorts by the column information.



## Renewal Reports

Selected Report: Current Members

Full Name Contains

Member #

Find

Dashboard Queries

- Current Members
- Current Members (only within 30 day grace period)
- Current Members (only within 60 day grace period)
- Current Members (only within 90 day grace period)
- Financial Roster
- Historical Roster
- Lapsed Members
- New Members (within 30 days)
- New Members (within 60 days)
- New Members (within 90 days)
- Renewals (within 30 days)
- Renewals (within 60 days)
- Renewals (within 90 days)
- Roster Listings with No Email Address
- Roster Listings with No Mailing Address
- State members who attended ACTE national events

Page: 1 of 10 Go Page size: 50 Change

Export

Address 1 Address Address City State Province Zip

### 1. Renewals (within 30 days)

This Renewals report gives a list of **all** entries that have a transaction date within the past **30** days.

| Transaction Date | Transaction Type | Join Date     | Paid Through |
|------------------|------------------|---------------|--------------|
| 8/8/2022         | DIST             | 8/1/2016 0:00 | 7/31/2022    |
| 7/20/2022        | DIST             | 7/1/2022 0:00 | 6/30/2023    |
| 8/4/2022         | DIST             | 7/1/2017 0:00 | 6/30/2023    |
| 7/27/2022        | DIST             | 7/1/2022 0:00 | 6/30/2023    |
| 7/25/2022        | DIST             | 9/1/2008 0:00 | 9/30/2023    |
| 7/25/2022        | DIST             | 7/1/2022 0:00 | 6/30/2023    |
| 8/2/2022         | DIST             | 9/1/2016 0:00 | 8/31/2023    |
| 7/12/2022        | DIST             | 7/1/2017 0:00 | 6/30/2023    |
| 7/25/2022        | DIST             | 7/1/2022 0:00 | 6/30/2023    |

### 2. Renewals (within 60 days)

This Renewals report gives a list of **all** entries that have a transaction date within the past **60** days.

| Transaction Date | Transaction Type | Join Date      | Paid Through |
|------------------|------------------|----------------|--------------|
| 8/8/2022         | DIST             | 8/1/2016 0:00  | 7/31/2022    |
| 6/27/2022        | DIST             | 3/1/2017 0:00  | 5/31/2023    |
| 6/23/2022        | DIST             | 8/1/2016 0:00  | 5/31/2023    |
| 8/4/2022         | DIST             | 7/1/2017 0:00  | 6/30/2023    |
| 7/25/2022        | DIST             | 9/1/2008 0:00  | 9/30/2023    |
| 8/2/2022         | DIST             | 9/1/2016 0:00  | 8/31/2023    |
| 7/5/2022         | DIST             | 8/1/2016 0:00  | 7/31/2023    |
| 6/29/2022        | DIST             | 12/3/2020 0:00 | 5/31/2023    |
| 7/12/2022        | DIST             | 7/1/2017 0:00  | 6/30/2023    |
| 6/23/2022        | DIST             | 6/1/2022 0:00  | 5/31/2023    |



### 3. Renewals (within 90 days)

This Renewals report gives a list of **all** entries that have a transaction date within the past **90** days.

| Transaction Date | Transaction Type | Join Date         | Paid Through |
|------------------|------------------|-------------------|--------------|
| 5/11/2022        | DIST             | 4/1/2021<br>0:00  | 3/31/2023    |
| 8/8/2022         | DIST             | 8/1/2016<br>0:00  | 7/31/2022    |
| 6/27/2022        | DIST             | 3/1/2017<br>0:00  | 5/31/2023    |
| 6/23/2022        | DIST             | 8/1/2016<br>0:00  | 5/31/2023    |
| 8/4/2022         | DIST             | 7/1/2017<br>0:00  | 6/30/2023    |
| 7/25/2022        | DIST             | 9/1/2008<br>0:00  | 9/30/2023    |
| 8/2/2022         | DIST             | 9/1/2016<br>0:00  | 8/31/2023    |
| 5/28/2022        | DIST             | 7/1/2016<br>0:00  | 6/30/2023    |
| 5/27/2022        | DIST             | 5/1/2021<br>0:00  | 4/30/2023    |
| 5/30/2022        | DIST             | 2/9/2021<br>0:00  | 5/31/2023    |
| 7/5/2022         | DIST             | 8/1/2016<br>0:00  | 7/31/2023    |
| 6/29/2022        | DIST             | 12/3/2020<br>0:00 | 5/31/2023    |
| 5/16/2022        | DIST             | 6/1/2020<br>0:00  | 5/31/2023    |
| 7/12/2022        | DIST             | 7/1/2017<br>0:00  | 6/30/2023    |



## Missing Member Information Reports

### 1. Roster Listing with No Email Address

Selected Report:

Roster Listings with No Email Address

Member #

Find

Export

1

2

3

4

5

6

7

8

9

10

Page: 1 of 10

Go

Page size: 50

Change

Item 1 to 50 of 500

Show all 500

| Id | Full Name | Company | Address 1 | Address 2 | Address 3 | City | State Province | Zip | Address Purpose |
|----|-----------|---------|-----------|-----------|-----------|------|----------------|-----|-----------------|
|----|-----------|---------|-----------|-----------|-----------|------|----------------|-----|-----------------|

This report shows a list of members who have no email address in their member profile. You are also able to search by member number to find one individual record. To sort multiple records from search, click on the column heading.

### 2. Roster Listing with No Mailing Address

Selected Report:

Roster Listings with No Mailing Address

Member #

Find

Export

Address 1

Address 2

Address 3

City

State Province

Zip

Address Purpose

This report shows a list of members who have no mailing address in their member profile. You are also able to search by member number to find one individual record. To sort multiple records from search, click on the column heading.



## Member Event Activity Reports

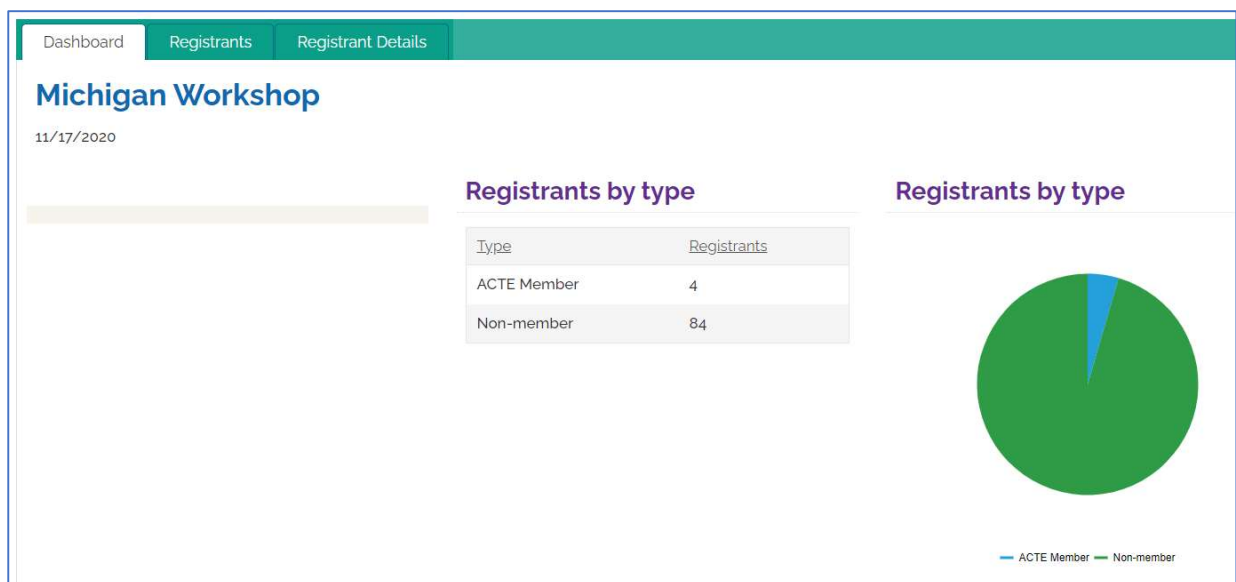
## Chapter-Sponsored Event Dashboards

### Chapter-Sponsored Event Dashboards

When ACTE manages registration for a state event, a dashboard is created and accessible through the SCM.

| ACTE CHAPTER ADMINISTRATION   |            |            | BACK TO ACTEONLINE.ORG | CONTACT US |
|---|------------|------------|------------------------|------------|
| <a href="#">ACTE Chapter Administration</a> » <a href="#">My ACTE Chapters</a> » Chapter Management |            |            |                        |            |
|   |            |            | Export ▾               |            |
| Event   | Begin Date | End Date   |                        |            |
| <a href="#">CTE Summer Leadership Conference</a>  | 08/02/2021 | 08/03/2021 |                        |            |
| <a href="#">CTE Summer Leadership Conference - 2022</a>   | 08/03/2022 | 08/05/2022 |                        |            |
| <a href="#">Classroom Management Tips and Resources</a>   | 09/16/2021 |            |                        |            |
| <a href="#">New CTE Teacher Workshop</a>  | 10/13/2021 | 10/13/2021 |                        |            |
| <a href="#">Michigan Workshop</a>   | 11/17/2020 | 11/17/2020 |                        |            |

The Dashboard Tab gives you a breakdown of registration types.





The Registrants Tab lists all who registered for the event which includes members and nonmembers.

| Dashboard Registrants Registrant Details  |              |       |       |                 |            |              |       |       |                 |
|---|--------------|-------|-------|-----------------|------------|--------------|-------|-------|-----------------|
| Event Registrants   |              |       |       |                 |            |              |       |       |                 |
| <div>Export</div> <div><div>1 2 3 4</div><div>Page: 1 of 4 Go Page size: 25 Change</div><div>Item 1 to 25 of 100</div></div> <div>Show all 100</div> <table><tr><th>Registrant</th><th>Organization</th><th>Title</th><th>Email</th><th>Date registered</th></tr></table> |              |       |       |                 | Registrant | Organization | Title | Email | Date registered |
| Registrant  | Organization | Title | Email | Date registered |            |              |       |       |                 |



## State Members Who Attended ACTE National Events

The final report on the drop-down menu is the ACTE National Event registrants from your state.

**Selected Report:** State members who attended ACTE national events

Export

Page: 1 of 2 Go Page size: 50 Change Item 1 to 50 of 81

Show all 81

| Date       | ACTE National Event                                    | Number of attendees | Click to view registrants        |
|------------|--|---------------------|----------------------------------|
| 12/1/2022  | 2022 ACTE CareerTech Expo - Las Vegas, NV              | 1                   | <a href="#">View Registrants</a> |
| 11/30/2022 | CareerTech Vision and Expo 2022                        | 11                  | <a href="#">View Registrants</a> |
| 10/16/2022 | Alaska ACTE PDC: Growing Stronger Together 2022        | 1                   | <a href="#">View Registrants</a> |
| 9/28/2022  | 2022 Best Practices and Innovations Conference         | 1                   | <a href="#">View Registrants</a> |
| 6/9/2022   | Butler Tech Good Trouble: Busting IAED Barriers in CTE | 1                   | <a href="#">View Registrants</a> |
| 4/28/2022  | 2022 ACTE-Utah Work-Based Learning Conference          | 2                   | <a href="#">View Registrants</a> |
| 3/21/2022  | National Policy Seminar 2022                           | 11                  | <a href="#">View Registrants</a> |
| 12/1/2021  | CareerTech Vision and Expo 2021                        | 84                  | <a href="#">View Registrants</a> |
| 9/30/2021  | 2021 Best Practices and Innovations Conference         | 3                   | <a href="#">View Registrants</a> |
| 9/24/2021  | 2021 Hybrid Region II Leadership Conference            | 9                   | <a href="#">View Registrants</a> |
| 9/23/2021  | IN ACTE Conference 2021 Sponsorship                    | 1                   | <a href="#">View Registrants</a> |

To see list of registrants, choose View Registrants.

**Attendee roster for**

**CareerTech Vision and Expo 2022**

**Chapter member attendees**

Export

| Full Name | Title | Company | Email | Phone | Registration Date | Total Charges | Total Payments | Balance | Address 1 | Address 2 | Address 3 |
|-----------|-------|---------|-------|-------|-------------------|---------------|----------------|---------|-----------|-----------|-----------|
|-----------|-------|---------|-------|-------|-------------------|---------------|----------------|---------|-----------|-----------|-----------|

This gives you a report of everyone from your state who has registered for the national event including the amount paid, date paid, and all individual details.



## Export options

When you have run a report, you can export the information as Word, Excel, PDF, CSV, or XML.

Selected Report:

Full Name Contains

Member #

Page: 1 of 5 Go Page size: 50 Change

Show all 234

Export

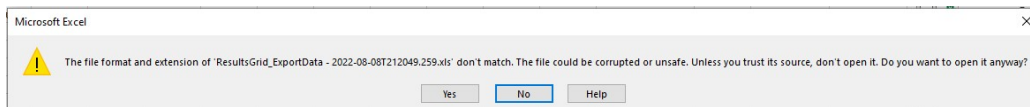
Word Excel PDF CSV XML

| Id          | Last Name | First Name | Title | School/Business | Email | Address 1 | Address 2 | Address 3 | City | State | Zip | Work Phone | Home Phone | Paid Through |
|-------------|-----------|------------|-------|-----------------|-------|-----------|-----------|-----------|------|-------|-----|------------|------------|--------------|
| Instruction |           |            |       |                 |       |           |           |           |      |       |     |            |            |              |

The **Word export** –

| <u>Id</u> | <u>Last Name</u> | <u>First Name</u> | <u>Title</u> | <u>School/Business</u> | <u>Email</u> |
|-----------|------------------|-------------------|--------------|------------------------|--------------|
|-----------|------------------|-------------------|--------------|------------------------|--------------|

The **Excel export** brings up a warning message.



| 1 | A  | B         | C          | D     | E               | F     | G         |
|---|----|-----------|------------|-------|-----------------|-------|-----------|
|   | Id | Last Name | First Name | Title | School/Business | Email | Address 1 |

The **PDF export** gives you a non-editable document.

| Id | Last Name | First Name | School/Business | Email | Address 1 | Address 2 | Address 3 | City | State | Zip | Address P | Work Phone | Home Phone | Paid Through |
|----|-----------|------------|-----------------|-------|-----------|-----------|-----------|------|-------|-----|-----------|------------|------------|--------------|
|----|-----------|------------|-----------------|-------|-----------|-----------|-----------|------|-------|-----|-----------|------------|------------|--------------|

The **CSV export** is the recommended option for exporting reports.

| 1 | Id | Last Name | First Name | Title | School/Bu | Email | Address 1 | Address 2 | Address 3 | City | State | Prov | Zip | Address P | Work Pho | Home Pho | Paid Through |
|---|----|-----------|------------|-------|-----------|-------|-----------|-----------|-----------|------|-------|------|-----|-----------|----------|----------|--------------|
|---|----|-----------|------------|-------|-----------|-------|-----------|-----------|-----------|------|-------|------|-----|-----------|----------|----------|--------------|

The **XML export** brings up an error.

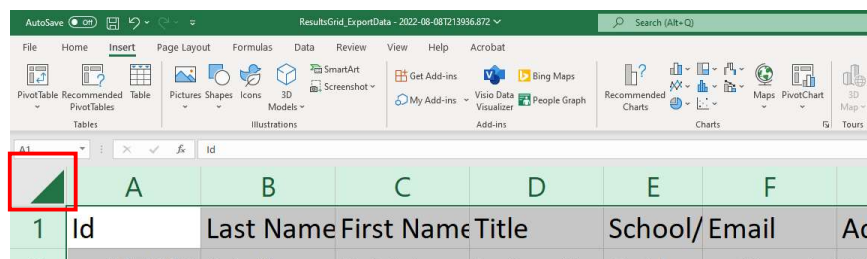


## Spreadsheet Filters, Text Filters, and Sort Functions

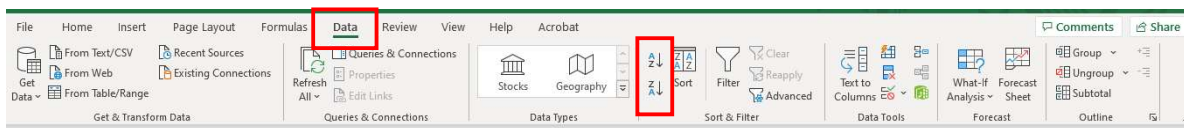
To widen a column in a CSV export, double click on the line between the columns (E and F).

| E             | F  |
|---------------|----|
| School/ Email | Ad |

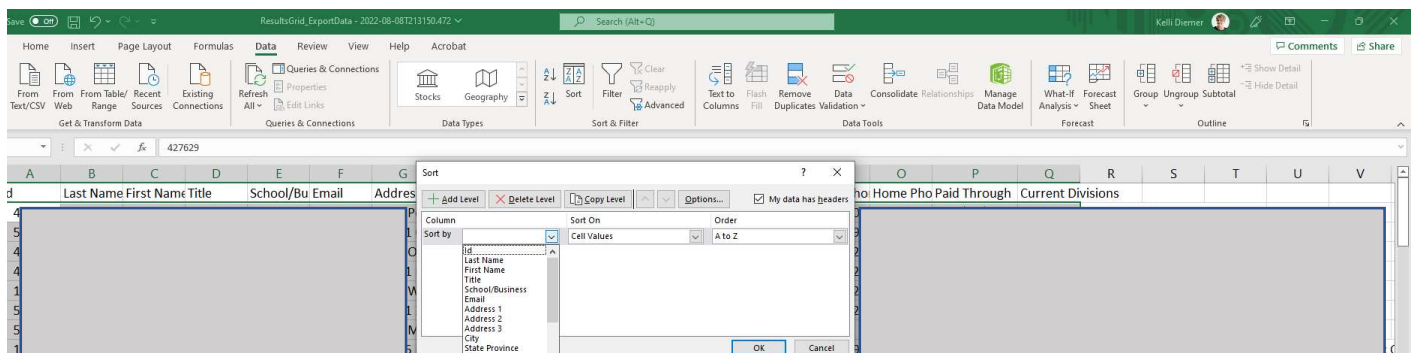
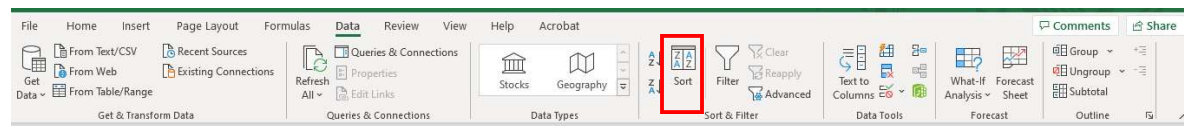
By clicking on the **top left space**, you can quickly highlight the entire spreadsheet. This enables you to choose Filter for all columns and rows of the spreadsheet.



The Sort function can be used by choosing the column title you want to sort by and then choose ascending or descending.

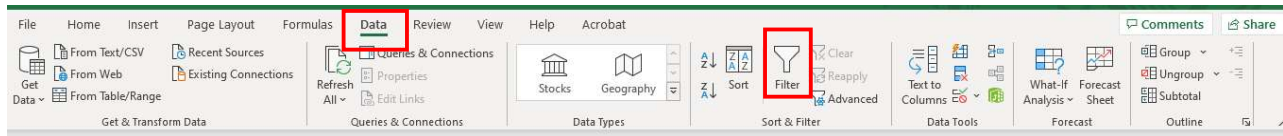


To sort by multiple columns, choose the sort option.

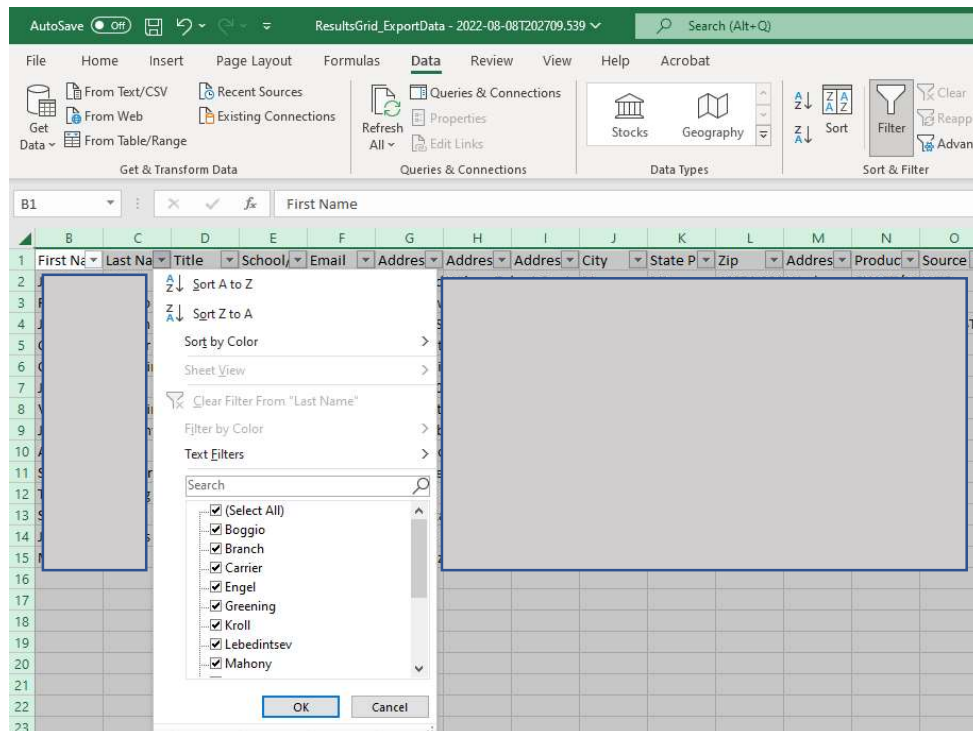




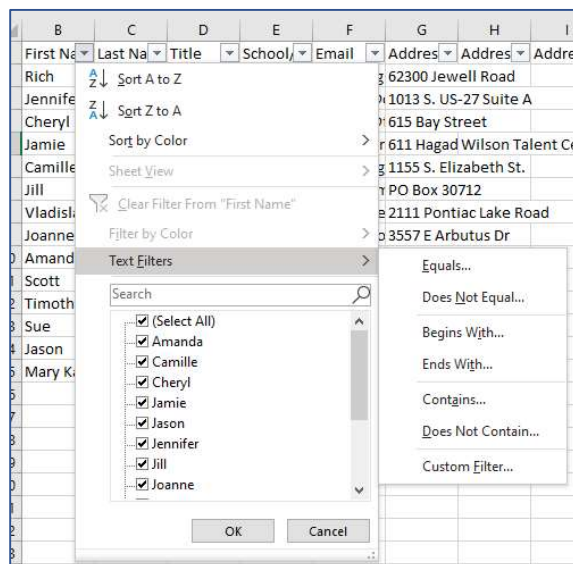
Filter function is under the dropdown Data menu.



When the Filter function is on, the **Sort** option is listed in the Filter drop down menu.



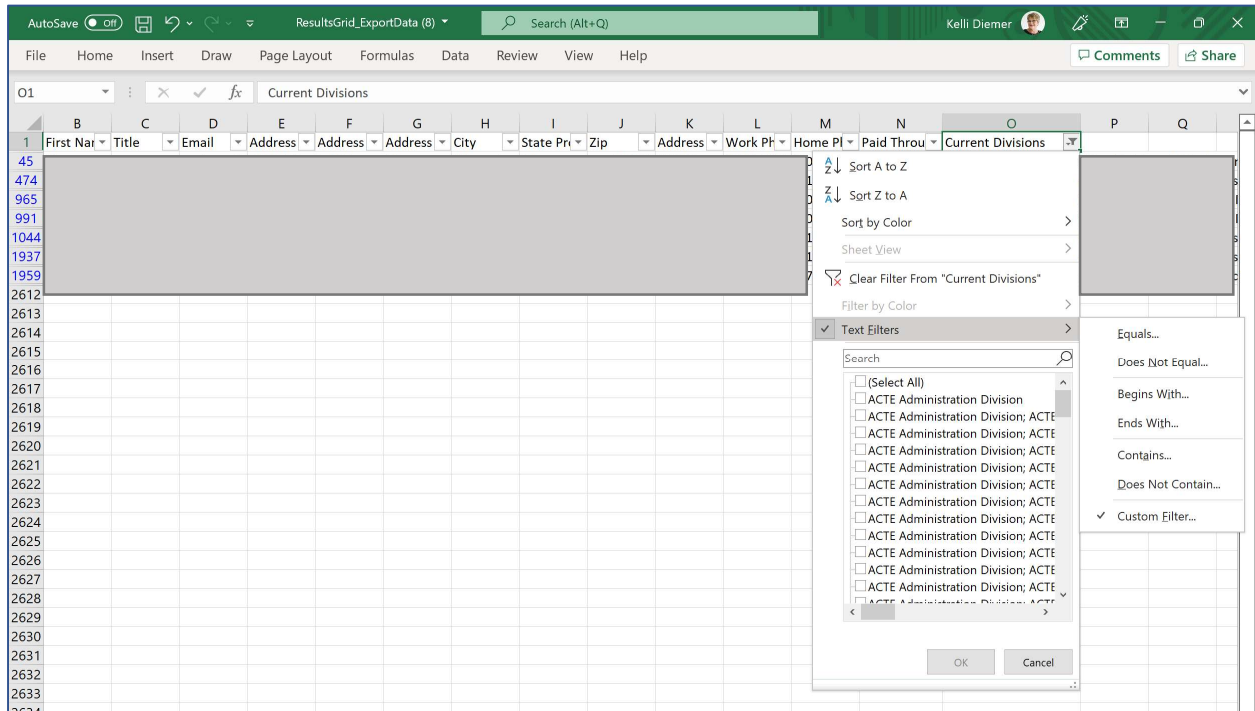
Text filter is an option under the filter function.



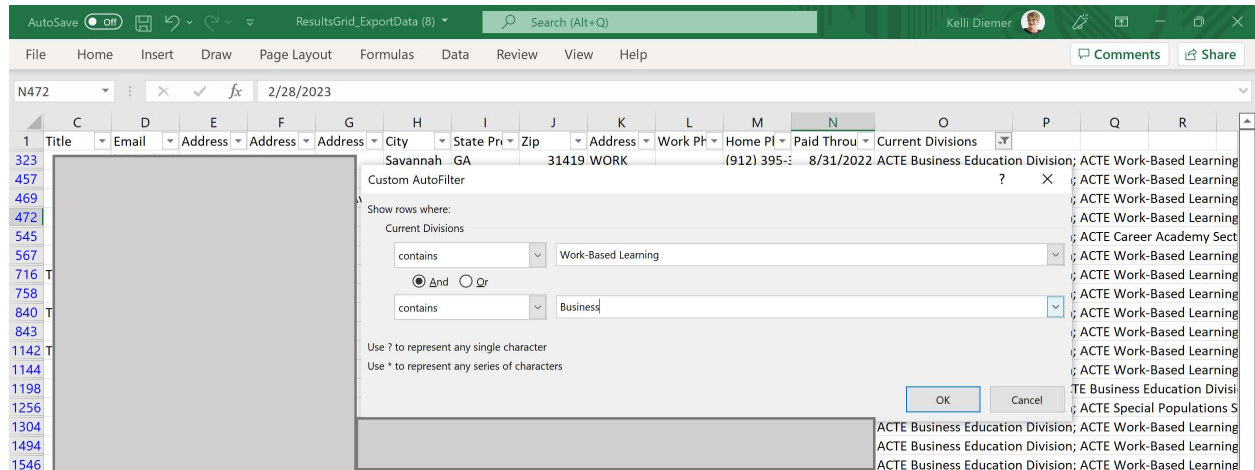


## Division Report

To create a report with certain Divisions, export the total roster to Excel or CSV. Open filter on your report and choose **text filter** on Current Divisions field.



To find members in the Business Division that are also in Work-Based Learning, use the options under Text Filter (And, Or, Contains, Does not Contain, etc.) to pull your specific list of members in ACTE Divisions/Sections column.





## Spreadsheet Grouping, Subtotals, and Grand Totals

### Financial Roster Reports

This will run a report for all transactions run between dates.

**Selected Report:** Financial Roster

**Transaction Date Between** 7/1/2022 and 8/31/2022

**Member #**

**Find**

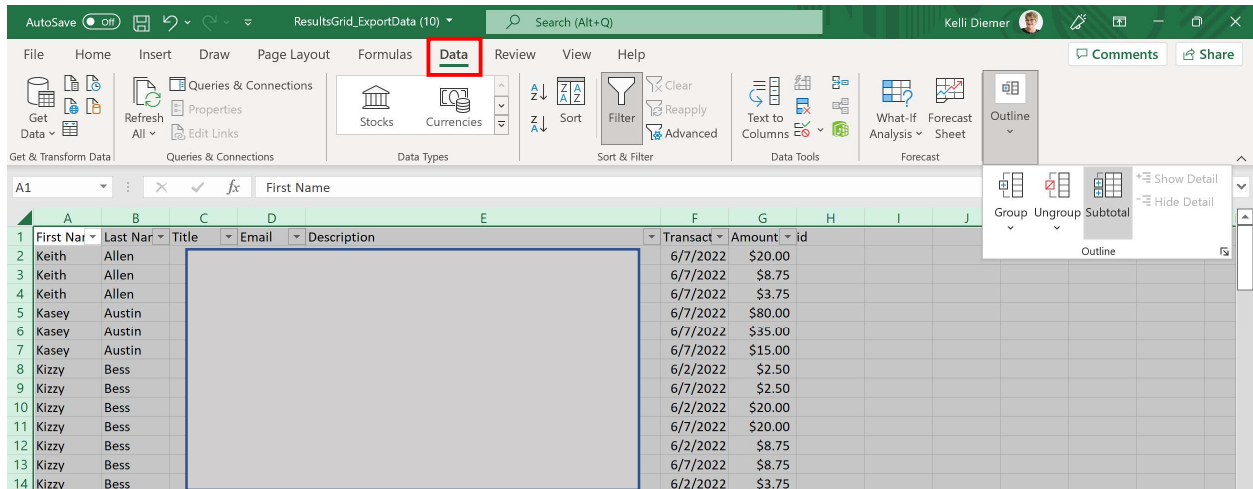
Choose the **select all** to highlight all rows and columns. Turn on the filter for the report.

| First Name | Last Name | Title | Email | Description | Transaction Date | Amount Paid |
|------------|-----------|-------|-------|-------------|------------------|-------------|
| Keith      | Allen     |       |       |             | 6/7/2022         | \$20.00     |
| Keith      | Allen     |       |       |             | 6/7/2022         | \$8.75      |
| Keith      | Allen     |       |       |             | 6/7/2022         | \$3.75      |
| Kasey      | Austin    |       |       |             | 6/7/2022         | \$80.00     |
| Kasey      | Austin    |       |       |             | 6/7/2022         | \$35.00     |

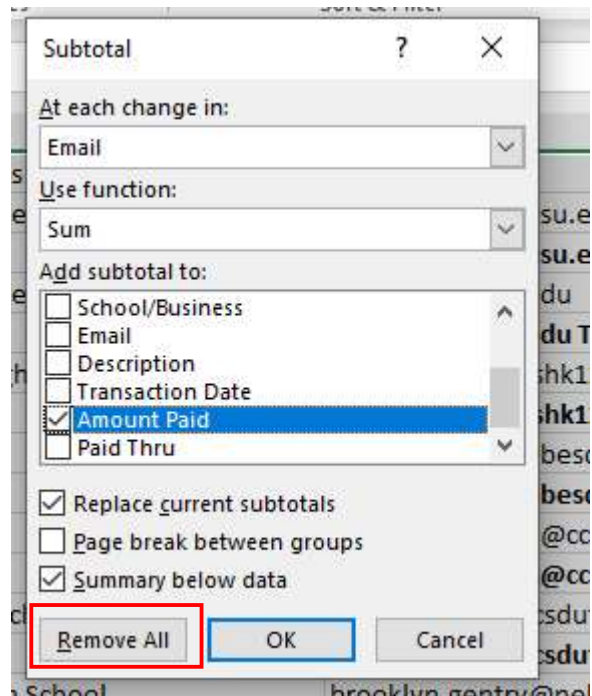
At this point, it is important to sort your data by the appropriate field (usually the email field to keep individual's records together).



From the Data menu, choose outline and then subtotal.

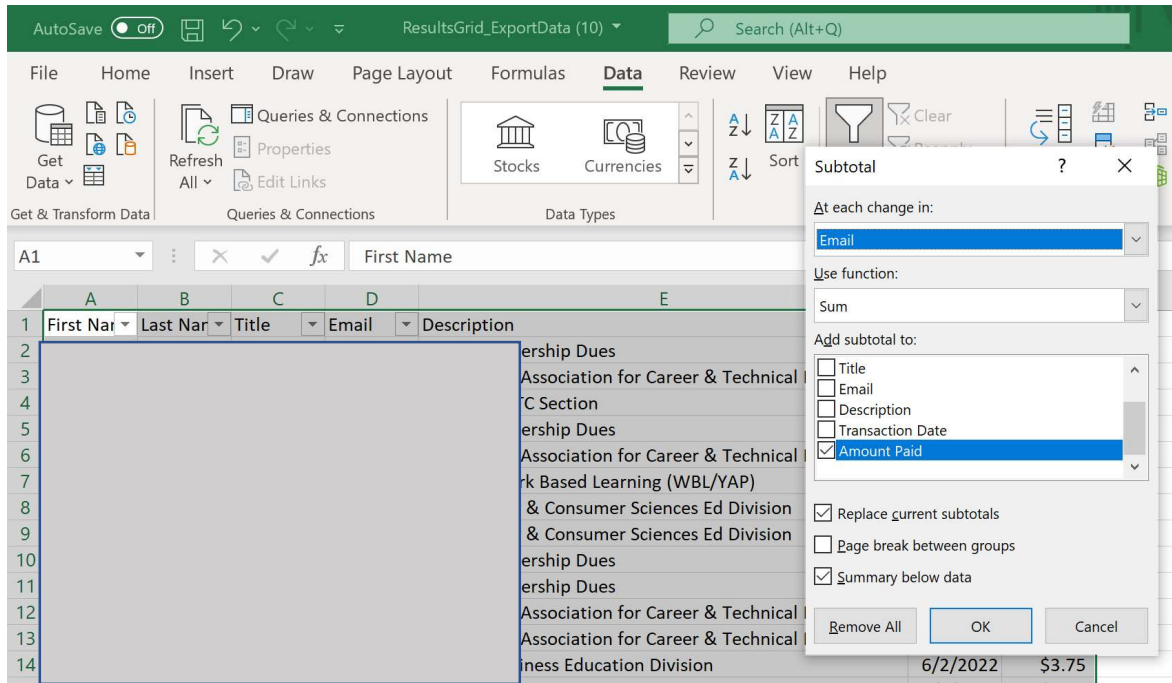


If you didn't sort before running subtotals, you are able to remove this calculation and redo after sorting by choosing **Remove All** button.





To find totals by individual, choose the following within the Subtotal menu.



This will give you subtotals by individual -

| File Home Insert Draw Page Layout Formulas Data Review View Help               |            |           |       |       |   |          |          |    |
|--|------------|-----------|-------|-------|---|----------|----------|----|
| Get & Transform Data Queries & Connections Data Types Sort & Filter Data Tools |            |           |       |       |   |          |          |    |
| A1 fx First Name   |            |           |       |       |   |          |          |    |
| 1  | A          | B         | C     | D     | E   | F        | G        | H  |
| 2  | First Name | Last Name | Title | Email | Description   | Transact | Amount   | id |
| 3  |            |           |       |       | ACTE Membership Dues                                    | 6/7/2022 | \$20.00  |    |
| 4  |            |           |       |       | GA-Georgia Association for Career & Technical Educ      | 6/7/2022 | \$8.75   |    |
| 5  |            |           |       |       | Georgia ROTC Section                                    | 6/7/2022 | \$3.75   |    |
| 6  |            |           |       |       | <b>BobJones@gmail.com Total</b>                         |          | \$32.50  |    |
| 7  |            |           |       |       | ACTE Membership Dues                                    | 6/7/2022 | \$80.00  |    |
| 8  |            |           |       |       | GA-Georgia Association for Career & Technical Educ      | 6/7/2022 | \$35.00  |    |
| 9  |            |           |       |       | Georgia Work Based Learning (WBL/YAP)                   | 6/7/2022 | \$15.00  |    |
| 10   |            |           |       |       | <b>NancyJones@gmail.com Total</b>                       |          | \$130.00 |    |
| 11   |            |           |       |       | ACTE Family & Consumer Sciences Ed Division             | 6/2/2022 | \$2.50   |    |
| 12   |            |           |       |       | ACTE Family & Consumer Sciences Ed Division             | 6/7/2022 | \$2.50   |    |
| 13   |            |           |       |       | ACTE Membership Dues                                    | 6/2/2022 | \$20.00  |    |
| 14   |            |           |       |       | ACTE Membership Dues                                    | 6/7/2022 | \$20.00  |    |
| 15   |            |           |       |       | GA-Georgia Association for Career & Technical Educ      | 6/2/2022 | \$8.75   |    |
| 16   |            |           |       |       | GA-Georgia Association for Career & Technical Educ      | 6/7/2022 | \$8.75   |    |
| 17   |            |           |       |       | Georgia Business Education Division                     | 6/2/2022 | \$3.75   |    |
| 18   |            |           |       |       | Georgia Business Education Division                     | 6/7/2022 | \$3.75   |    |
| 19   |            |           |       |       | Georgia Family and Consumer Sciences Education Division | 6/2/2022 | \$3.75   |    |
| 20   |            |           |       |       | Georgia Family and Consumer Sciences Education Division | 6/7/2022 | \$3.75   |    |
|  |            |           |       |       | <b>PeteJones@gmail.com Total</b>                        |          | \$77.50  |    |



Choosing the #2 in the upper left corner will collapse the details and give you the amount that was paid by each individual.

AutoSave 

Off

ResultsGrid\_ExportData (10)

Search (Alt+Q)

File

Home

Insert

Draw

Page Layout

Formulas

Data

Review

View

Help

Get Data

Queries & Connections

Refresh

All

Properties

Edit Links

Stocks

Currencies

Sort

Filter

Clear

Reapply

Advanced

Text to Columns

Data Tools

Get & Transform Data

Queries & Connections

Data Types

Sort & Filter

Data Tools

A1

