

# **Table of Contents**

Overview	2
Open the View Metrics Page	3
From The View Metrics Tile	3
From The Top Navigation Bar	4
Reports Page Overview	5
Navigating Filters	6
View Past Years	6
Date Filters	7
Counties Filters	8
Zip Codes Filters	10
Navigating Tables	12
Opening Icons	12
Drill Down/Up Icon	13
Copy Icon	17
Filters Icon	19
Focus Mode	19
Export Data	21
Show as a Table	25
Spotlight	26
Sort By	28
Sort Year from Table	31
Navigating Graphs	32
Opening Icons	32
Drill Down/Up Icon	33
Copy Icon	
Filters Icon	41
Focus Mode	42
Export Data	43
Show as a Table	47
Spotlight	48
Sort By	50
Filter by Year	53



# **Overview**

This job aid covers how to Navigate and Export Reports in MI Bridges.

User with the *View Metrics* permission can view, navigate, and export ten reports in your organization.



**Note:** This information is available at any time and can be helpful when an agency needs information for a grant or agency report.



# **Open the View Metrics Page**

### FROM THE VIEW METRICS TILE

1. Click the **View Metrics** tile on the Community Partner Dashboard to open the Reports page.

Manage 🖌 Manage 🗸	ती Reports 🔅 Settings 🗸			Logout					
Roger Stanley's Dashbo	ard CP ID 18327	77-002							
Sign Up for Email Notific	cations	I want to							
Receive a daily summary of client ac	tions needed	Keep Up With COVID-19 Benefit Changes	L View Client Directory	Add New Client					
Notifications	10 New	Assign Referrals	Manage Referrals	View Metrics					
New Referral(s) to Assign New Referral(s) to Manage	9 1								
View All Notifications		Explore Re	sources Community Pa Resou	rtner Tools & rces					

Notice that the **Reports** page has now opened.

Reports										
@ <u>Benefits</u>	s - Last 18 Months	All widget	s on this tab	are refres	hed daily. Last refr	efreshed on: 11/29/2023				
	Select a Date			Countie	s	Zip Coc	les			
	7/1/2022 12/21/2023			All	$\sim$	All		$\sim$		
	0		-0							
	Applications Breakdow	wn		Renew	als Breakdown	1				
	Type Year Submissions Single	Apply For Ben Multiple Healthca	nefits are FAP Cas	Type Year S	Submissions Single	Renew My Be Multiple He	nefits ealthcare	FAP Cash		
	2022 57 55	2 3	37 3	2023	12 12	0	1	4 7		
	2023 31 17	<b>14</b> 1	17 14 1	Total	12 12	0	1	4 7		
	Total 88 72	16 5	54 17 1							
	AFB Household Memb	oer Per Progra	m	RMB Household Member Per Program						
	Туре	Apply For	Benefits	Туре	R	enew My Ben	efits			
	Year Healthcare Coverage	FAP Ca	sh Assistanc	Year H	Healthcare Coverage	e FAP	Cash Ass	istance Cl		
	2022 2787	674	15	2022	(	0 20		0		
	2023 1484	751	35	2023	25	5 102		42		
	Total 4271	1425	51	Total	25	5 122		42		
Benefits - Last 18 Months     Referrals - Last 18 Months	Referrals by User - Last 18 Months	Referral Completion - Last	t 18 Months	Referrals by N	eed - Last 18 Months	Suggested Resc				

**Note:** Tables and Graphs are also referred to as widgets. The orange box tells us when the widgets were last refreshed. The tabs on the bottom allow you to navigate to other reports.



FROM THE TOP NAVIGATION BAR

1. Click **Reports** from the Top Navigation Bar.



# Notice that the **Reports** page has now opened.

Reports										
() <u>Benefits</u>	<u>s - Last 18 Months</u>	All widgets on this ta	b are refreshed daily.	Last refreshed	t refreshed on: 11/29/2023					
	Select a Date		Counties	Zij	o Codes					
	7/1/2022 12/21/2023		All	∼ A	1	$\sim$				
	0	0								
	Applications Breakdowr	1	Renewals Brea	kdown						
	Type Year Submissions Single M	Apply For Benefits ultiple Healthcare FAP Ca	Type Year Submission	Renew ns Single Multi	My Benefits ple Healthcar	re FAP Cash				
	2022 57 55	2 37 3	2023 1	2 12	0	1 4 7				
	2023 31 17	14 17 14 1	Total 1	2 12	0	147				
	Total 88 72	16 54 17 1								
	AFB Household Member	r Per Program	RMB Househo	RMB Household Member Per Program						
	Туре	Apply For Benefits	Туре	Renew N	/ly Benefits					
	Year Healthcare Coverage	FAP Cash Assistanc	Year Healthcare	Coverage F	AP Cash	Assistance CI				
	2022 2787	674 15	2022	0	20	0				
	2023 1484	751 35	2023	25	102	42				
	Total 4271	1425 51	Total	25	122	42 ;				
Benefits - Last 18 Months     Referrals - Last 18 Months	Referrals by User - Last 18 Months Ref	ferral Completion - Last 18 Months	Referrals by Need - Last 18 M	Ionths Suggeste	d Resc					
		<b>C</b> 11								
<b>Note:</b> Tables and	d Graphs are also	o referred to	as widgets							

The orange box tells us when the widgets were last refreshed. The tabs on the bottom allow you to navigate to other reports.



# **Reports Page Overview**

The Reports Page has ten tabs:

- **Benefits Last 18 Months**: Shows all applications and renewals your organization has assisted clients in completing broken down by program type for the last 18 months. Also shows the number of Applications for Benefits and Renew my Benefits for a household per program.
- **Referrals Last 18 Months**: Shows all referrals your organization has received from residents and other organizations broken down by status for the last 18 months. Also shows reasons the resident's need were unmet and number of referrals sent by the same client.
- **Referrals by User Last 18 Months**: Shows all resources sent to residents broken down by flow for the last 18 months. Also shows number of referrals that have been assigned and reassigned to a user in your organization.
- **Referral Completion Last 18 Months**: Shows number of all referrals that were met or unmet t broken down by Community Partner user for the last 18 months. Also shows reasons why and how many referrals were unmet by CP Users in your organization.
- **Referrals by Need Last 18 Months**: Shows number of the top 10 referral requests broken down by year for the last 18 months. Also shows the average number of times referrals have been reassigned and the number of referrals by need statement that are in a specific status.
- Suggested Resources Last 18 Months: Shows the average number of suggested resources broken down by year for the last 18 months. Also shows the number of resources found through Explore Resources and the top 10 needs received for your organization.
- Needs Last 18 Months: Shows the top 10 most common needs broken down by year for the last 18 months.
- Navigator Last 18 Months: Shows the number of residents assisted by your organization broken down by Navigator for the last 18 months. Also shows number of Applications and renewals Navigators have helped with, and number of resources recommended by Navigators.
- Users Last 18 Months: Shows all Community Partner users broken down by CP-ID for the last 18 months.
- Clients Last 18 Months: List all Residents who are assigned to Navigators within your organization broken down by CP-ID for the last 18 months.



# **Navigating Filters**

All filters and table/graph functionality are available in all reports.

# VIEW PAST YEARS

1. Click the **Past Years** button to view data prior to the last 18 months.

<u>nefits - Last 18 Months</u>	All widgets on this tab	are refreshed daily. Last ro	freshed on: 11/29/a	2023	¢
Select a Date		Counties	Zip Codes		
7/1/2022 12/21/2023		All	All	$\sim$	
0	0				
Applications Breakdown		Renewals Breakdow	'n		
Type Year Submissions Single Mu	Apply For Benefits Itiple Healthcare FAP Cas	Type Year Submissions Sing	Renew My Benefits le Multiple Healthc	are FAP Cash	
2022 57 55	2 37 3	2023 12	2 0	1 4 7	
2023 31 17	14 17 14 1	Total 12 1	2 0	147	
Total 88 72	16 54 17 1				
AFB Household Member	Per Program	RMB Household M	mber Per Progr	am	
Type Year Healthcare Coverage	Apply For Benefits FAP Cash Assistanc	Type Year Healthcare Covera	Renew My Benefits ge FAP Casl	h Assistance CI	
2022 2787	674 15	2022	0 20	0	
2023 1484	751 35	2023	25 102	42	
Total 4271	1425 51	Total	25 122	42 ;	

Notice the years change on the reports and data prior to the last 18 months is now shown.

nefits - Past Years All	widgets on this tab are refro	eshed mont	hly on the 1st-3rd.	Last refr	eshed on: 11/	29/20	23
Select a Date		Counti	es	Zip	Codes		
8/23/2018 6/30/2022		All	$\sim$	All			$\sim$
0	0						
Applications Breakdo	wn	Rene	wals Breakdowr	1			
Type Year Submissions Single	Apply For Benefits Multiple Healthcare FAP	Type Year	Submissions Single	Renew N Multip	/ly Benefits le Healthcare	FAP (	Casł
2018 112 63	49 63 47	2018	7 7	,	0 4	3	(
2019 197 133	64 124 72	2019	70 70	)	0 65	6	3
Total 407 262	145 220 155	Total	91 91		0 81	10	3
AFB Household Mem	ber Per Program	RMB	Household Mer	nber P	er Program		
Type	Apply For Benefits	Туре	Ren	ew My B	enefits	<b>CD</b>	
rear Healthcare Coverage	FAP Cash Assistance C	Year	Healthcare Coverag	e FAP	Cash Assistant	ce CD	
2018 4	3 0	2019	1	8 0		0	0
2020 41 Total 2516	2 /4	Total		5 18 6 399		0	6
2516	1581 923 10	j lotal	3	288		0	0



2. Click the **Back** button to return to the Benefits for the Last 18 Months.

Select a D	Date			Counti	es		Zip Co	des		
8/23/2018	6/30/2022	2		All		$\sim$	All			$\sim$
0			0							
						_	_			
Application	ons Breakd	own		Rene	wals Breako	down				
Туре		Appl	y For Benefits	Туре		R	lenew My B	Benefits		
Year Subr	nissions Singl	e Multiple H	Healthcare FAP	( Year	Submissions	Single	Multiple I	Healthcare	FAP	Casł
2018	112 63	3 49	63 47	2018	7	7	0	4	3	(
2019	197 133	3 64	124 72	2019	70	70	0	65	6	ä
Total	407 262	2 145	220 155	Total	91	91	0	81	10	З
				_		_				
AFB Hous	sehold Men	nber Per P	rogram	RMB	Household	Mem	ber Per	Program		
Туре		Apply F	or Benefits	Туре		Renev	w My Bene	fits		
Year Heal	thcare Coverag	je FAP Ci	ash Assistance	CI Year	Healthcare Co	overage	FAP Cas	h Assistanc	ce CD	C F
2018		4 3	0	2019		18	0		0	0
2020	4		74	2020		18	18		0	0

# DATE FILTERS

1. Click and drag the circles on either side of the line to choose your date range.

Selec	t a Date
7/1/2	2022 12/21/2023
0-	
$\bigcirc$	<b>Note:</b> The date range is auto populated in the "Select a Date" global filter. To change this date range, you can use the filter to filter the data for a smaller range.
$(\mathbf{Q})$	Tip: You can update the date range by:
	<ul> <li>Clicking the Date field and selecting a date from the calendar pop up.</li> </ul>
	Typing Dates into the Date fields.



Notice the Date Range has been updated and the widgets below reflect data within the new date range.

Selec	ect a Date						Counti	es	Zip Codes						
9/15	/2022 10/	8/2023					All		$\sim$	All			$\sim$		
	0														
						-				_					
Appli	ications Bro	ea <mark>kdo</mark>	wn				Renewals Breakdown								
Туре			Appl	y For Benef	its		Туре		I	Renew My	Benefits				
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas	Year	Submissions	Single	Multiple	Healthcare	FAP	Cash		
2022	12	11	1	8	1		2023	12	12	0	1	4	7		
2023	23	13	10	11	10		Total	12	12	0	1	4	7		
Total	35	24	11	19	11										
		•					_		_						
	Household	Mem	ber Per	Program			RMB	Household	Mem	ber Per	Program	1			
Tuno	lousenera		,		nofita		Turne		D		Domofita				
туре				арріу гог ве	nents		Туре		Kt		Coole A				
Year	Healthcare Co	overage	e faf	, Cash	Assist	anc	Year	Healthcare Co	overage	FAP	Cash A	ssista	nce Ci		
2022		1266		408		8	2022		C		20		0		
2023		1264		643		33	2023		25	1	02		42		
Total		2530	) 1	051		41	Total		25	1	22		42 7		

#### **COUNTIES FILTERS**

1. Click the **Dropdown Arrow** in the Counties Field.

Counties	
All	$\searrow$

2. Select one or more **Counties** from the dropdown.

Counties	
All	^
<sup>O</sup> Search	
Select all	
(Blank)	
🗌 Вау	
Berrien	
Calhoun	
Cass	Э
Houghton	

**Tip**: You can use the scroll bar on the right of the counties list to see more counties, or use the **Search** function to search for a specific county.



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Notice the Counties has been updated, and the tables/graphs below reflect data within the Counties selected.

Selec	t a Date				ct a Date					Zip C	Zip Codes				
7/1/	2022 .	12/2	1/2023				Multiple	e selections	$\sim$	All			$\sim$		
0-						-0									
Applications Breakdown								wals Break	down						
Туре				Appl	y For Bene	fits	Туре		1	Renew My	Benefits				
Year	Submissio	ns	Single	Multiple	Healthcar	e FAP Cas	Year	Submissions	Single	Multiple	Healthcare	FAP	Cash		
2022		19	17	2	13	3 1	2023	2	2	0	1	1	0		
2023		5	3	2	3	3 3	Total	2	2	0	1	1	0		
Total	2	24	20	4	16	5 4									
		_					_		_						
AFB I	Househo	ld I	Meml	oer Per	Program	1	RMB	Household	l Mem	nber Pei	r Program	1			
Туре				A	opply For B	enefits	Туре	Type Renew My Benefits							
Year	Healthcare	e Co	verage	FAP	Cash	n Assistanc	Year	Healthcare C	overage	e FAP	Cash As	sista	nce Cl		
2022			607		102	1	2022		C	)	10		0		
2023			246		137	4	2023		_1		40		0		
Total			853		239	5	Total		1		50		0		
							_								

**Tip**: Click outside of the Counties dropdown to exit out of the Counties dropdown.



### **ZIP CODES FILTERS**

1. Click the **Dropdown Arrow** in the Zip Codes Field.

Zip Codes	
All	

2. Select one or more **Zip Codes** from the dropdown.

Z	Zip Codes								
	All	$\wedge$							
	<sup>O</sup> Search								
	Select all								
	(Blank)								
	20520								
	20530								
٦¢	48079								
U	48104								
-	48108	-							
		1							

**Note:** When you select one or more Counties, it updates the available zip codes on the dropdown list.



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Notice the Zip Code(s) have been updated and the tables/graphs below reflect data within the Zip Code(s) selected.

Selec	t a Date					Counties			Zip C	odes		
7/1/	2022 12/	21/2023	3			All $\checkmark$			Multi	Multiple selections $\sim$		
0-					-0							
									_			
Applications Breakdown				Rene	wals Break	down						
Туре			Appl	y For Bene	fits	Туре		I	Renew My	Benefits		
Year	Submissions	Single	Multiple	Healthcare	e FAP Cas	Year	Submissions	Single	Multiple	Healthcare	FAP	Cash
2022	19	19	0	1(	) 1	2023	1	1	0	0	1	0
2023	1	0	1	1	1	Total	1	1	0	0	1	0
Total	20	19	1	11	2							
		•										
AFB I	Household	Mem	ber Per	Program	1	RMB Household Member Per Program						
Туре			А	pply For Be	enefits	Туре		Re	enew My I	Benefits		
Year	Healthcare Co	overage	e FAF	Cash	n Assistanc	Year	Healthcare C	overage	FAP	Cash As	ssista	nce Cl
2022		318	}	35		2023		4	Ļ	19		2
2023		61		38	1	Total		4	Ļ	19		2
Total		379	)	73	2							

**Tip**: Click outside of the Zip Code(s) dropdown to exit out of the Zip Code(s) dropdown.



# **Navigating Tables**

# **Note:** All tables have the same functionalities and capabilities.

Appli	Applications Breakdown					Renewals Breakdown							
Туре			Appl	y For Benef	its		Туре	Type Renew My Benefits					
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas	Year	Submissions	Single	Multiple	Healthcare	FAP	Cash
2022	57	55	2	37	3		2023	12	12	0	1	4	7
2023	31	17	14	17	14	1	Total	12	12	0	1	4	7
Total	88	72	16	54	17	1							
		•					_		_				
AFB I	Household	Meml	ber Per	Program			RMB	Household	d Mem	nber Per	Program	1	
Туре			A	pply For Be	enefits	;	Туре		Re	enew My I	Benefits		
Year	Healthcare Co	overage	FAP	Cash	Assis	tanc	Year	Healthcare C	overage	FAP	Cash As	ssista	nce Cl
2022		2787	,	674		15	2022		C	)	20		0
2023		1484		751		35	2023		25	1	02		42
Total		4271	1	425		51	Total		25	1	22		42 ;
_													

Tip: Click the scroll bar at the bottom of the table to view all of the data.

\_\_\_\_\_

# **OPENING ICONS**

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1. Hover over a table to view the lcons.

Applications Breakdown 🕥 🗸 📖 📼 📼						62	
Туре	Apply For Benefits						
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas	
2022	57	55	2	37	3		
2023	31	17	14	17	14	1	
Total	88	72	72 16 54 17				



DRILL DOWN/UP ICON

1. Click the **Down Arrow** icon to *Drill Down* on the data.

Applications Breakdown 🔹 🗘 🕮 🎍 🗉 🗧 🕫						63
Туре		Apply For Benefits				
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas
2022	57	55	2	37	3	
2023	31	17	14	17	14	1
Total	88	72	16	54	17	1

**Note:** Drill Down will filter the current data on the table to Quarter, Month, Week, and Date depending on how specific you would like to go.

**Tip**: You can also Drill Down your data by using the other drill down buttons available:

**Next Level Hierarchy:** when clicked will show all Quarters, if clicked again will show all Months, etc.

Expand Hierarchy: when clicked will show all Quarters within all Years, if clicked again
 will show all Months within all Quarters in every Year, etc.

Notice the Down Arrow is now highlighted and ready to drill down on any **Year** on the table.

Applications Breakdown 🐘 n 💿 🛛 🕂 🛛 🖙 🖬 😁								
Туре	Apply For Benefits							
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas		
2022	57	55	2	37	3			
2023	31	17	14	17	14	1		
Total	88	72	16	54	17	1		

2. Click any **Year** from the Year Column in the current table.

Applications Breakdown 🔹 🕆 🛛 🗮 🎰 🔍 🗟 😁							
Туре	Apply For Benefits						
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas	
2022	57	55	2	37	3		
2023	31	17	14	17	14	1	
Total	88	72	16	54	17	1	

Ч



Notice that the Year selected is now bolded with the Quarters listed below.

Applications Breakdown ↑ ♥ ↓↓ ♠ ♥ ₹ ☎ …									
Туре	Apply For Benefits								
Year	Submissions	Single	Multiple	Healthcare	FAP	Cá			
2022	57	55	2	37	3				
Q3	50	49	1	30	2				
Q4	7	6	1	7	1				
Total	57	55	2	37	3				



**Tip**: Click the scroll bar at the right of the table to view all of the data.

# 3. Click any **Quarter** listed in the table to drill it down further.

Applications Breakdown ↑ ● ↓ ☆ ○ 〒 ☎ …									
Туре		Apply For Benefits							
Year	Submissions	Single	Multiple	Healthcare	FAP	Cá			
2022	57	55	2	37	3				
Q3	50	49	1	30	2				
Q4	7	6	1	7	1				
Total	57	55	2	37	3				

Notice that the Quarter selected is now bolded with the Months listed below.

Applications Breakdown ↑ ● ↓ ↔ ○ = ↔ ·										
Туре			Apply For Benefi							
Year	Submissions	Single	Multiple	Healthcare						
2022	50	49	1	30						
Q3	50	49	1	30						
July	20	19	1	9						
Total	50	49	1	30						



4. Click any **Month** listed in the table to drill it down further.

Applications Breakdown ↑ ● ↓ ☆ ○ ≂ ⊗ ··								
Туре			Appl	ly For Benefi				
Year	Submissions	Single	Multiple	Healthcare				
July	20	19	1	9				
August	4	4	0	2				
Sentember	26	<b>2</b> 6	$\cap$	10				
Total	50	49	1	30				

Notice that the Month selected is now bolded with the Weeks listed below.

Applications	s Breakdow	/n	↑ ♥ ↓↓	↓ 0 <del>-</del> 6 …
Туре			Арр	ly For Benet
Year	Submissions	Single	Multiple	Healthcare
Q3	20	19	1	9
July	20	19	1	g
07/03/2022	10	9	1	5
Total	20	19	1	g

5. Click any Week listed in the table to drill it down further.

Applications	s Breakdow	↑ ♥ ↓↓ ↓	t C = C	
Туре			App	ly For Benet
Year	Submissions	Single	Multiple	Healthcare
07/03/2022	10	9	1	5
07/10/2022	3	3	0	2
07/17/2022	7	7	0	5
Total	20	19	1	9



Notice that the Week selected is now bolded with the Dates listed below.

Applications	Breakdow	n ^	❹ ↓↓ ☆	0 = 6 …
Туре			Арр	ly For Ben€
Year	Submissions	Single	Multiple	Healthcar
July	10	9	1	
07/03/2022	10	9	1	
07/05/2022	1	0	1	
Total	10	9	1	

**Note:** The Week is the last data point you can Drill Down on.

6. To remove the Drill Down filter, Click the **Drill Up** icon until it is greyed out to return to the default settings.

7. Click the **Drill Down** icon to remove the Drill Down function so it is not highlighted.



Notice that the table is now returned to its default setting.

Applications	Breakdow	n 1	\ ↓ ↓ ↓	0 = 62
Туре			App	ly For Benef
Year	Submissions	Single	Multiple	Healthcare
2022	57	55	2	37
2023	31	17	14	17
Total	88	72	16	54



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**COPY ICON** 

1. Click the **Copy** icon to copy the table as an image with a caption.



**Note:** This function will not copy the image of the entire table but only the section that is shown currently.

Tip: To get a full copy of the image click on the Focus Mode or Show as Table icon:
Use the Snipping Tool from your computer or the Print Screen (Prt Sc) function on your keyboard to copy the full image of the table.

Notice that it is preparing the Copy, and a notification saying, "Your Visual is Ready to Copy".



2. Click the green **Copy to Clipboard** button.



Notice a notification appears saying "Copied" meaning the image has been copied to your clipboard and is ready to be pasted wherever you choose.

Copied!	×	
	Close	



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3. Click the green **Close** button.



4. Paste the copied image by right clicking your mouse and selecting **Paste** from the dropdown menu.

Search the menus	
X Cu <u>t</u>	
Сору	
Paste Options:	
<u>à</u> 🖗 🖾	

Tip: You can also paste the image by selecting CTRL and V on your keyboard.

Notice that the image is copied with a link to the Power BI report and information on when the data was last updated.

Applications Breakdown							
Type Year	Submissions	Single	Appl Multiple	y For Benefi Healthcare	ts FAP	Cash	CDC
2022	57	55	2	37	3	5	2
2023	31	17	14	17	14	11	6
Total	88	72	16	54	17	16	8
Open in Power BI (CP) Community Partner Analytics Data as of 1/4/24, 1:36 PM							



**FILTERS ICON** 

1. Click the **Filters** icon to show all the filters and slicers affecting the table.

Applications	Breakdow	n 1	\	0 = 6 …
Туре			App	ly For Benef
Year	Submissions	Single	Multiple	Healthcare
2022	57	55	2	37
2023	31	17	14	17

Notice a pop up appears with a list of all the **Filters** and **Slicers** affecting the table.

Appli	Applications Breakdown					සි …	
Type Apply For Bene					Application is before 9/2	_Submit_Datec 10/2023	
Year	Submissions	Single	Multiple	Healthcare	<b>COUNTY</b> is Bay, Berrien, Calhoun, Cass, Houghton, Ingham, Jackson, Kent, Monroe, or Montcalm		
2022	37	35	2	27			
2023	20	12	8	ç	8	Total	

# 2. To exit out of this function, click outside the box.

Appl	ications Bre	eakdo	wn	$\uparrow ~ \downarrow ~ \downarrow \downarrow$	¢ 0	
Туре			App	ly For Benefi	ts	Application_Submit_Date_c is before 9/20/2023
Year	Submissions	Single	Multiple	Healthcare	FAF	COUNTY is Bay, Berrien, Calhoun, Cass, Houghton, Ingham, Jackson, Kent, Monroe, or Montcalm

# FOCUS MODE

1. Click the **Focus** icon to see the full-page view of the table.

Applications	Breakdow	n	v ↓ ↓ ⊅	0 = 62
Туре			Арр	ly For Benef
Year	Submissions	Single	Multiple	Healthcare
2022	57	55	2	37
2023	31	17	14	17



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#### Notice the table opens in a new page.

		14													1	$\downarrow$	$\downarrow \downarrow$	¢	
<	Back to report	APP	LICATIONS	BREAKDOWN															
Туре			Арр	ly For Benefi	ts								Total						
Year	Submissions	Single	Multiple	Healthcare	FAP	Cash	CDC	SER	WIC	Submissions	Single	Multiple	Healthcare	FAP	Cash	CDC	SER	WIC	
2022	57	55	2	37	3	5	2	12	0	57	55	2	37	3	5	2	12	0	
2023	31	17	14	17	14	11	6	11	10	31	17	14	17	14	11	6	11	10	
Total	88	72	16	54	17	16	8	23	10	88	72	16	54	17	16	8	23	10	

**Tip:** To get a full copy of the image:

• Use the **Snipping Tool** from your computer or the **Print Screen** (Prt Sc) function on your keyboard to copy the full image of the table.

## 2. To return to the Reports page, click the **Back to report** button.

l	< 1	Back to report	APP	LICATIONS	BREAKDOWN														
Т	ype	Apply For Benefits Total																	
١	'ear	Submissions	Single	Multiple	Healthcare	FAP	Cash	CDC	SER	WIC	Submissions	Single	Multiple	Healthcare	FAP	Cash	CDC	SER	WIC

# Notice you are now returned to the original reports page.

Last 18 Months	All widget	s on this tab	are refre	shed daily. La	st refres	shed on: 11,	/29/2023		
Select a Date			Countie	es		Zip Cod	es		
7/1/2022 12/21/2023			All		$\sim$	All		$\sim$	
0		-0							
Annliestiene Breekdeum			Dama	wels Breek	Jaura				
Type	Apply For Ben	efits	Type	wais Break	aowh <sub>Ré</sub>	enew My Rei	hefits		
Year Submissions Single Mu	Itiple Healthca	re FAP Cas	Year	Submissions	Single 1	Multiple He	althcare F/	AP Cash	
2022 57 55	2 3	37 3	2023	12	12	0	1	4 7	
2023 31 17	14 1	17 14 1	Total	12	12	0	1	4 7	
Total 88 72	16 5	64 17 1							
			-		_				
AFB Household Member	Per Program	m	RMB	Household	Mem	ber Per Pr	ogram		
Туре	Apply For	Benefits	Туре		Rer	new My Bene	efits		
Year Healthcare Coverage	FAP Ca	sh Assistanc	Year	Healthcare Co	overage	FAP	Cash Assis	stance C	1
2022 2787	674	15	2022		0	20		0	
2023 1484	751	35	2023		25	102		42	
Total 4271	1425	51	Total		25	122		42	:



# EXPORT DATA

1. Click the More Options icon.

Applications	Breakdow	<b>n</b> 1	- ↓ ↓ ↓	0 = 62 …
Туре			Арр	ly For Benef
Year	Submissions	Single	Multiple	Healthcare
2022	57	55	2	37
2023	31	17	14	17

# 2. Select **Export Data** from the dropdown menu.

Appli	cations Bro	eakdo	wn			_		Renewals	Brea
Turne			A				6	Export data	
туре			Аррі	y For Benefit	ts		æ	Show as a table	
Year	Submissions	Single	Multiple	Healthcare	FAP	(	S	Spotlight	
						-	Q	Get insights	
2022	57	55	2	37	3		Z↓	Sort descending	
2023	31	17	14	17	14		Ą↓	Sort ascending	
	51	17	14	17	1-1	۰.		Sort by	>
Total	88	72	16	54	17	1			



Notice that a "Which Data do you Want to Export" pop up box appears. From here you have different options to Export Data:

- **Data with Current Layout**: Downloads table as shown on the reports page along with the selected filters. Notice this will only export as an excel file.
- **Summarized Data**: Downloads the summarized data with the selected filters to show the breakdown of each individual benefit so you can calculate the average. Notice you have a choice to download this as an excel or a csv file.
- Underlying Data: Downloads raw data, mainly used for developers.

xport your data in the format	that suits your needs. If you have	ve a lot of data, the number of	
ows you export might be limite <u>xporting data</u>	ed depending on the file type y	ou select. <u>Learn more about</u>	
Data with current layout Export this data in the same layout you see now, but	O Summarized data Export the summarized data used to create your visual (for	O C C C C C C C C C C C C C	
windout any icons, colors, or other formatting you added.	medians).	YIJUU.	
xlsx (Excel 150,000-row max)	~		
		Funant	

- The **Cancel** on the bottom of the popup.
- 3. Click Data with Current Layout or the Summarized Data option.

Which data do you v Export your data in the format rows you export might be limi exporting data	vant to export? that suits your needs. If you hav ted depending on the file type y	xe a lot of data, the number of ou select. <u>Learn more about</u>
•	0	O ∂¢
Data with current layout Export this data in the same layout you see now, but without any icons, colors, or other formatting you added.	Summarized data Export the summarized data used to create your visual (for example, sums, averages, and medians).	Underlying data Export the raw data used to calculate the data in your visual.



# 4. Click the green **Export** button.

		0 ⊕∻
ata with current layout	Summarized data	Underlying data
port this data in the same yout you see now, but ithout any icons, colors, or her formatting you added.	Export the summarized data used to create your visual (for example, sums, averages, and medians).	Export the raw data used to calculate the data in your visual.

Notice a notification appears that says "Successful Export" and a notification that shows the table in the Downloads.

			¥.	~
-cp-reports			Downloads	Aø
ts 🍦 Settings 🗸			Applications Breakdown (1).vlsx Open file	Logout
			See more	
- Last 18 Months All widgets on this tab	are refreshed daily. Last refreshe	ed on: 11/29/2023	OPast Years	
Select a Date	Counties 2	Zip Codes	✓ Successful export	×
7/1/2022 12/21/2023	All	All 🗸	Your data was exported.	
o				
Applications Breakdown	Renewals Breakdown			
Type Apply For Benefits	Type Rene	ew My Benefits		
Year Submissions Single Multiple Healthcare FAP Cas	Year Submissions Single Mu	Iltiple Healthcare FAP Cash		
2022 57 55 2 37 3	2023 12 12	0 1 4 7		
2023 31 17 14 17 14 1	Total 12 12	0 1 4 7		
Total 88 72 16 54 17 1				



5. Click the **Open File** link on the Downloads notification to open the table.



**Tip**: You can also find it later in your Downloads folder on your computer.

If you selected **Data with Current Layout** option, notice that the table opens as an excel file with all the filters applied to the table listed below.

▥װ୬੶୯੶୫੶ ▫	Applications Breakdown (1) 🌘 Internal Data (Standar	rd State Data) 🗸 📃	𝒫 Search						
e Insert Draw Page Layout	Formulas Data Review View Help	1						9	Comments 🛛 🖻
▼ : × √ f <sub>x</sub>									
А	В	С	D	E	F	G	Н	I	J
Туре	Apply For Ben	efits							
Year	Submissions	Single	Multiple	Healthcare	FAP	Cash	CDC	SER	WIC
2022	17	16	1	12	1	0	0	5	0
2023	1	0	1	1	1	0	0	0	0
Total	18	16	2	13	2	0	0	5	0
Applied filt COUNTY is Application	ters: Bay, Berrien, n_Submit_Date	Calhour ec is o	n, Cass, Ho on or afte	oughton, or l r 8/1/2022 a	ngha Ind is	m befor	e 10/	12/2	023

If you selected **Summarized Data** option, notice that the table opens as an excel file with all the filters applied to the table listed above.

oSave 💽	D 🛛 9 - (* -	~ & ~ ⇒	Applications Breakdown (3) 🌻 In	ternal Data (Standard S	itate Data) 🗸 👂 Search					(				<b>m</b> – a
Home	Insert Drav	/ Page Layout	Formulas Data Review	View Help										🖓 Comments 🛛 🖻 Sh
		× √ fx												
А	В	С	D	E	F	G	н	1	J	к	L	М	N	0
Applie	filters:													
COUNT	Y is Bay, Ber	rien, Calhoun	, Cass, Houghton, or Ir	ngham										
Applica	ition_Submit	_Datec is o	n or after 8/1/2022 ar	nd is before 1	0/13/2023									
					Count of									
Year	Quarter	Month	WeekStart Date 🗔	Day 🗸	HOLISTIC_APPLICATION_ID	Single	Multiple	🖬 Healthcare	FAP	Cash	CDC	SER	WIC	🗸 Туре 🔍
2022	Q3	August	08/21/2022	08/26/2022		L	1	0	0 (	0	0	0	1	0 Apply For Benefits
2022	Q3	August	08/28/2022	08/31/2022	:	L	1	0	1 (	C	0	0	C	0 Apply For Benefits
2022	Q3	September	08/28/2022	09/01/2022	5	5	5	0	5 (	C	0	0	C	0 Apply For Benefits
2022	Q3	September	09/11/2022	09/12/2022	:	L	1	0	1 (	C	0	0	C	0 Apply For Benefits
2022	Q3	September	09/11/2022	09/15/2022	:	L	1	0	1 (	D	0	0	D	0 Apply For Benefits
2022	Q3	September	09/18/2022	09/23/2022	4	1	4	0	0 (	C	0	0	1	0 Apply For Benefits
2022	Q4	October	10/02/2022	10/06/2022	:	L	1	0	1 (	D	0	0	C	0 Apply For Benefits
2022	Q4	November	11/06/2022	11/10/2022		2	2	0	2 (	C	0	0	C	0 Apply For Benefits
2022	Q4	December	12/04/2022	12/05/2022	:	L	0	1	1 :	1	0	0	C	0 Apply For Benefits
2023	Q3	August	08/20/2023	08/21/2023		L	0	1	1	1	0	0	D	0 Apply For Benefits



SHOW AS A TABLE

1. Click the More Options icon.

Applications	Breakdow	<b>n</b> 1	- ↓ ↓ ↓	0 = 6
Туре			Арр	ly For Benef
Year	Submissions	Single	Multiple	Healthcare
2022	57	55	2	37
2023	31	17	14	17

# 2. Select **Show as a Table** from the dropdown menu.

Appli	cations Bre	eakdo	wn					Renewals	Brea
Turne			A 10.10		h		0	Export data	
туре			Аррі	y For Benefit	ts		æ	Show as a table	
Year	Submissions	Single	Multiple	Healthcare	FAP	(	S	Spotlight	
						-	Q	Get insights	
2022	57	55	2	37	3		Z↓	Sort descending	
2023	31	17	14	17	14		₽↓	Sort ascending	
	51	17	14	17	17	۰.		Sort by	>
Total	88	72	16	54	17	1			

Notice the table opens in a new page.

<	Back to	eport	APF	LICAT	IONS	BRE	AKD	own															Υ ·	↓ ↓↓	ų	0	Ξ	<u> </u>
Тур	9				Арр	ly Fo	or Be	enefi	ts												Total							
Yea	r Subm	ssions	Single	Mul	tiple	He	alth	care	FAP	Cash	CDC	SER	WIC	Subr	miss	ions	Sir	ngle	Multi	ple	Healthcare	FAP	Cash	CDC	SER	WIC		
2022	2	57	55		2			37	3	5	2	12	0			57		55		2	37	3	5	2	12	0		
202		31	17		14			17	14	11	6	11	10			31		17		14	17	14	11	6	11	10		
Tota	I	88	72		16			54	17	16	8	23	10			88	}	72		16	54	17	16	8	23	10		
Type Year	Apply For Ben Submissions	efits Single Mi	ultiple Hea	lthcare	FAP	Cash	CDC	SER N	To MIC Su	tal bmissions	Single	Multip	ole Hea	Ithcare	FAP	Cash	CDC	SER	wic									
2022	31	55	14	37	14	11	6	12	10	57	55		2	37	3 14	11	6	12	10									
Total	88	72	16	54	17	16	8	23	10	88	72	-	16	54	17	16	8	23	10									
([	<b>Note:</b> This new view shows the same data seen in the table on your original reports page.																											
		Tim		~ ~ +	~	c I				the.	ine																	

**Tip:** To get a full copy of the image:

• Use the **Snipping Tool** from your computer or the **Print Screen** (Prt Sc) function on your keyboard to copy the full image of the table.

¥



# 3. To return to the Reports page, click the **Back to Report** button.

<	Back to report	ack to report APPLICATIONS BREAKDOWN																
Туре	ype Apply For Benefits Total																	
Year	Submissions	Single	Multiple	Healthcare	FAP	Cash	CDC	SER	WIC	Submissions	Single	Multiple	Healthcare	FAP	Cash	CDC	SER	WIC

## Notice you are now returned to the original reports page.

Last to wonth:	<u>s</u>	All wid	gets on	n this	tab	are refre	eshed daily. La	ast refr	es <mark>hed on:</mark>	11/29/202	3	
elect a Date						Counti	es		Zip C	odes		
7/1/2022 12	/21/2023					All		$\sim$	All			$\sim$
0				-0								
					-							
pplications B	reakdow	n				Rene	wals Break	down				
Туре		Apply For	Benefits	s		Туре		i	Renew My	Benefits		
Year Submissions	s Single N	Iultiple Heal	thcare	FAP	Cas	Year	Submissions	Single	Multiple	Healthcare	FAP	Cash
2022 57	7 55	2	37	3		2023	12	12	0	1	4	7
2023 31	I 17	14	17	14	1	Total	12	12	0	1	4	7
Total 88	3 72	16	54	17	1							
	-					_		_				
AFB Household	d Membe	er Per Prod	aram			RMB	Household	l Mem	ber Per	Program	1	
Туре		Apply	For Ben	efits		Туре		Re	enew My B	enefits		
Year Healthcare G	Coverage	FAP	Cash A	Assista	anc	Year	Healthcare Co	overage	FAP	Cash A	ssista	nce Cl
2022	2787	674	0		15	2022		C	)	20		0
	23 1484 751				25	2023		25	1	าว		12
2023	۲۵ 1484 75 1484 75				22	LOLD		23		JZ		42

#### SPOTLIGHT

1. Click the More Options icon.

Applications	Breakdow	n 1	↓ ↓↓ ☆	0 = 62
Туре			App	ly For Benef
Year	Submissions	Single	Multiple	Healthcare
2022	57	55	2	37
2023	31	17	14	17

# 2. Select **Spotlight** from the dropdown menu.

Appli	ications Bro	eakdo	wn					Renewals	Bre
Turne		6	Export data						
туре			Аррі	æ	Show as a table				
Year	Submissions	Single	Multiple	Healthcare	FAP	(	and the second s	Spotlight	
						-	Q	Get insights	
2022	57	55	2	37	3		Z↓	Sort descending	
2023	21	17	1/	17	11	1	Ą↓	Sort ascending	
2023	51	17	14	17	14	۰.		Sort by	>
Total	88	72	16	54	17	1			



Notice the table is now spotlighted, with the other information on the reports page greyed out.

Selec	t a Date						Counti	es		Zip C	odes		
7/1/													
0-													
Appl	ications Bre	eakdo	м^ ↓ .	Ц д О '	= 62								
Туре			App	ly For Benefi	ts								
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas							
2022	57	55	2	37	3								
2023	31	17	14	17	14	1		12	12		1	4	7
Total	88	72	16	54	17	1							
		č				_							
AFB													

# 3. To exit out of this function, click outside the box.

Appli	ications Bro	ea <mark>kdo</mark>	N ↓ ↑ ↑	.↓ ☆  @  =	762	
Туре			Appl	y For Benefi	ts	
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas
2022	57	55	2	37	3	
2023	31	17	14	17	14	1
Total	88	72	16	54	17	1



# **Tip**: You can also exit out of this function by clicking **More Options**, and selecting **Spotlight**.

Notice you are now returned to the original reports page.

Last 18 Months	All	widgets on this f	tab are refro	eshed daily. La	ast refres	shed on: 11,	/29/2023	
Select a Date			Counti	es		Zip Cod	es	
7/1/2022 12/21/2	2023		All		$\sim$	All		$\sim$
0		0						
<b>Applications Break</b>	down		Rene	wals Break	down			
Туре	Apply	For Benefits	Туре		Re	enew My Be	nefits	
Year Submissions Sin	ngle Multiple H	lealthcare FAP C	Tas Year	Submissions	Single M	Multiple He	althcare FAP	Cash
2022 57	55 2	37 3	2023	12	12	0	1 4	7
2023 31	17 14	17 14	1 Total	12	12	0	1 4	1 7
Total 88	72 16	54 17	1					
			_		_			
AFB Household Me	ember Per P	rogram	RMB	Household	Memb	per Per Pr	ogram	
Туре	Ap	ply For Benefits	Туре		Ren	new My Ben	efits	
Year Healthcare Cove	rage FAP	Cash Assista	nc Year	Healthcare Co	overage	FAP	Cash Assista	ance Cl
2022 2	787 6	74 1	5 2022		0	20		0
2023 1.	484 7	51 3	2023		25	102		42
Tetel								



## SORT BY

# 1. Click the More Options icon.

Applications	Breakdow	n 1	$\downarrow \downarrow \downarrow \downarrow$	0 = 6
Туре			Арр	ly For Benef
Year	Submissions	Single	Multiple	Healthcare
2022	57	55	2	37
2023	31	17	14	17

# 2. Hover over **Sort By** from the dropdown menu.

Appli	ications Bro	eakdo	wn					<b>Renewals Brea</b>
Tuno			Appl	v For Donofi	te		0	Export data
туре			Аррі		æ	Show as a table		
Year	Submissions	Single	Multiple	£.	Spotlight			
						-	Q	Get insights
2022	57	55	2	37	3		Z↓	Sort descending
2023	31	17	14	17	14		A↓	Sort ascending
		17	1.1	17				Sort by
Total	88	72	16	54	17	1		
_								

Notice a second dropdown appears with options to sort the data in the table.

From the dropdown menu you can sort the data by different data points available on the table.Click a Label to sort by.

Appli	ications Bro	ea <mark>kdo</mark>	wn			_		Rene	wals B	rea	k	down		
Туре	Culturalizations	Circula	Appl	y For Benefi	ts		6 æ	Export of Show as	data s a table			F	Renew My	/ Ben
Year	Submissions	Single	Multiple	Healthcare	FAP	C	\$\$ 0	Spotligh Get insi	nt abts		IS	Single	wuitipie	неа
2022	57	55	2	37	3		Z↓	Sort des	scending		2	12	0	
2023	31	17	14	17	14		Ą↓	Sort aso	cending		2	10	0	
Total	88	72	16	54	17	1	Sort by >					Subr	nissions	
	88 /2 16 54 1/							_		_		Sing	le	
												Multi	iple	
AFB I	Household	Mem	ber Per	Program				RMB	House	eho		Heal	thcare	
-					<i>c</i> .,			-				FAP		
Type	e Apply For Benefit							Type				Cash	ı	
Year	ar Healthcare Coverage FAP Cash Assis							Year	Healthc	are		CDC		
										_		SER		
2022	2 2787 674							2022				WIC		



4. Notice that the table is now sorted by the label selected in **Ascending** order.

Appli	Applications Breakdown							
Туре		Apply For Benefits						
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas		
2023	31	17	14	17	14	1		
2022	57	55	2	37	3			
Total	88	72	16	54	17	1		
	-							

# 5. To sort by **Descending** order, click **More Options**.

Appli	ications Bro	ea <mark>kdo</mark>	N ↓ ↓ ↑	Ц ф (C	Ŧ 63	***
Туре		Apply For Benefits				
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas
2023	31	17	14	17	14	1
2022	57	55	2	37	3	
Total	88	72	16	54	17	1

# 6. Click the **Descending** order button.



# Notice the table is now sorted by the **Descending** order.

Appli	Applications Breakdown								
Туре		Apply For Benefits							
Year	Submiss	ions	Single	Multiple	Healthcare	FAP	Cas		
2022		57	55	2	37	3			
2023		31	17	14	17	14	1		
Total		88	72	16	54	17	1		
			•						



## 7. To remove the sorting, click **More Options**.

Appli	ications Br	eakdo	N ↑ ↑ 1	1 t C .	- 6	•••
Туре		Apply For Benefits				
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas
2022	57	55	2	37	3	
2023	31	17	14	17	14	1
Total	88	72	16	54	17	1

# 8. Hover over **Sort By** from the dropdown menu.

Appli	Applications Breakdown							<b>Renewals Bre</b>
			A				0	Export data
Type			Аррі	y For Benefi	lS		æ	Show as a table
Year	Submissions	Single	Multiple	Healthcare	FAP	(	ß	Spotlight
							Q	Get insights
2022	57	55	2	37	3	~	Z↓	Sort descending
2023	21	17	1/	17	11		₽ļ	Sort ascending
LOLD	51	17	17 14 17 14					Sort by
Total	88	72	16	54	17	1		

# 9. Click the Label with the Check Mark to deselect the sorting.



Tip: You can always click another label to Sort By from this dropdown menu..

 $\mathbf{G}$ 



## SORT YEAR FROM TABLE

## 1. Click the **Arrow** under Year to sort by Ascending order.

Appli	ications Bro	eakdo	N ↑ ↓ 1	, , , , , , , , , , , , , , , , , , ,	= 63	•••
Туре		Apply For Benefits				
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas
2022	57	55	2	37	3	
2023	31	17	14	17	14	1
Total	88	72	16	54	17	1

Notice the Years are sorted in Ascending order.

Appli	Applications Breakdown							
Туре		Apply For Benefits						
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas		
2022	57	55	2	37	3			
2023	31	17	14	17	14	1		
Total	88	72	16	54	17	1		
	-	•						

2. Click the Arrow again under Year to sort by Descending order.

Appli	ications Bro	ea <mark>kdo</mark>	N ↑ ↓ 1	1) A O .	- 6	
Туре		Apply For Benefits				
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas
2022	57	55	2	37	3	
2023	31	17	14	17	14	1
Total	88	72	16	54	17	1

Notice the Years are sorted in Descending order.

Appl	Applications Breakdown							
Туре		Apply For Benefits						
Year	Submissions	Single	Multiple	Healthcare	FAP	Cas		
2023	31	17	14	17	14	1		
2022	57	55	2	37	3			
Total	88	72	16	54	17	1		



# **Navigating Graphs**



# **OPENING ICONS**

1. Hover over a graph to view the lcons.





#### DRILL DOWN/UP ICON

1. Click the **Down Arrow** icon to *Drill Down* on the data.



**Note:** Drill Down will filter the current data on the table to Quarter, Month, Week, and Date depending on how specific you would like to go.

Notice the **Drill Down** icon is now highlighted and ready to drill down on any **Year** on the graph.





2. Click any **Year** from the Year Column in the current graph.



Notice that the graph now shows all the Quarters from the selected Year.





3. Click any **Quarter** on the graph to drill it down further.



Notice that the graph now shows all the Months from the selected Quarter.





4. Click any **Month** on the graph to drill it down further.



Notice that the graph now shows all the Weeks from the selected Month.





5. Click any **Week** on the graph to drill it down further.



Notice that the graph now shows all the Days from the selected Week.



Note: The Week is the last data point you can Drill Down on.

6. To remove the Drill Down filter, Click the **Drill Up** icon until it is greyed out to return to the default settings.



**Tip**: If you just want to return to a Year, Quarter, Month, or Week, click the **Drill Up** icon until it you are back to the specific filter.



# **View Metrics**

7. Click the **Drill Down** icon to remove the Drill Down function so it is not highlighted.



Notice that the graph is now returned to its default setting.





#### **COPY ICON**

1. Click the **Copy** icon to copy the graph as an image with a caption.





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**Note:** This function will not copy the image of the entire table but only the section that is shown currently.

Tip: To get a full copy of the image click on the Focus Mode or Show as Table icon:
Use the Snipping Tool from your computer or the Print Screen (Prt Sc) function on your keyboard to copy the full image of the table.

Notice that it is preparing the Copy with a notification saying, "Your visual is ready to copy".



2. Click the green **Copy to clipboard** button.

Your visual is re	ady to copy	×
	Copy to clipboard	d



Notice a notification appears saying "Copied" meaning the image has been copied to your clipboard and is ready to be pasted wherever you choose.

Copied!	×
	Close

3. Click the green **Close** button.

Copied!	×
	Close

4. Paste the copied image by right clicking your mouse and selecting **Paste** from the dropdown menu.

Search the menus	
X Cu <u>t</u>	
<u>С</u> ору	
Paste Options:	

**W** 

**Tip**: You can also paste the image by selecting **CTRL** and **V** on your keyboard.



Notice that the image is copied with a link to the Power BI report and information on when the data was last updated.



#### **FILTERS ICON**

1. Click the **Filters** icon, to show all the filters and slicers affecting the table.



Notice a pop up appears with a list of all the Filters and Slicers affecting the table.





2. To exit out of this function, click outside the box.



#### FOCUS MODE

1. Click the **Focus** icon to see the full-page view of the graph.



## Notice the graph opens in a new page.



# **Tip:** To get a full copy of the image:

• Use the **Snipping Tool** from your computer or the **Print Screen** (Prt Sc) function on your keyboard to copy the full image of the table.

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2. To return to the Reports page, click the **Back to Report** button.

< Back to report	REFERRAL BREAKDOWN
●New ●Co	mpleted •Need Met •Need Not Met

Notice you are now returned to the original reports page.

D <u>Referrals - Last 18 Months</u> All widgets on this ta	ab are refreshed daily	. Last refreshe	d on: 11/29	/2023					
Select a Date	Counties		Zip Co	des					
7/24/2022 11/6/2023	Multiple selecti	ons 🗸	All		$\sim$				
0									
Referral Breakdowr↑ ↓ ↓ ☆ @ 〒 ☎ …	Reasons Needs	Were Unm	et						
●New ●Completed ●Need Met ●Need Not Met	Year Client didn't	Year Client didn't come to appointment Client no longer has this							
126	2022 0.09								
120	Total		0.09						
۲ 100									
ප දූ 80									
rg e 60	Multiple Refer	rals by Sam	e Client						
j j 40	Year	1	2	3 4	l+				
	2022	22	3	5	8				
7 4 3 6 4 4	2023	4	1		1				
0 2022 2023									

#### EXPORT DATA

1. Click the **More Options** icon.



2. Select **Export Data** from the dropdown menu.





Notice that a "Which Data do you Want to Export" pop up box appears. From here you have different options to Export Data:

- **Summarized Data**: Downloads the summarized data with the selected filters to show the breakdown of each individual benefit so you can calculate the average. Notice you have a choice to download this as an excel or a csv file.
- Underlying Data, Downloads raw data, mainly used for developers.

Note: The D	Data with Current Layo	<b>out</b> option is only avai	ilable for tables.
Which data do you v	vant to export?		×
Export your data in the format rows you export might be limi <u>exporting data</u>	that suits your needs. If you have that suits your needs. If you have ted depending on the file type y	ve a lot of data, the number of vou select. <u>Learn more about</u>	
○	•	● → ⊕ ⊕ ←	
Data with current layout	Summarized data	Underlying data	
CThis option is only available for table and matrix visuals	Export the summarized data used to create your visual (for example, sums, averages, and medians).	Export the raw data used to calculate the data in your visual.	
File format:			
.xlsx (Excel 150,000-row max	)~		
		Export Cance	1
Tip: For the	e best results, use the	Summarized Data op	tion.
Tip: Exit out • The	t of the popup clicking • <b>X</b> button on the top	: right corner	

• The **Cancel** on the bottom of the popup.



# 3. Click Data with Current Layout option.



# 4. Click the green **Export** button.

Which data do you want to export? $ imes$									
Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. Learn more about exporting data									
$\bigcirc$	•	●							
Data with current layout	Summarized data	Underlying data							
(This option is only available for table and matrix visuals	Export the summarized data used to create your visual (for example, sums, averages, and medians).	Export the raw data used to calculate the data in your visual.							
File format:									
.xlsx (Excel 150,000-row max) ~									
		Export Cancel							

Notice a notification appears that says "Successful export" and a notification that shows the graph in the Downloads.

							$\overline{\uparrow}$	-		×
cp-reports						Downloads	◘ q … ☆			A٩
; 🏟 Settings 🗸						Referral Breakdown.xlsx Open file			Logout	
	See more									
Last 18 Months	All widgets on this tab a	re refreshed daily. L	ast refreshed	i on: 11/29/2023		OPast Years				
Select a Date           7/1/2022         1/4/2024		<b>Counties</b> All	$\sim$	Zip Codes	```	Your data was exported.		×	:	
	$\frown$									



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5. Click the **Open File** link on the Downloads notification to open the table.



**Tip**: You can also find it later in your Downloads folder on your computer.

The **Summarized Data** option shows that the table opens as an excel file with all the filters applied to the table listed above.

		᠑᠂᠙᠂᠖᠂᠄	🕫 Referral Br	eakdown (1) 🎈 Ir		dard State Dat		♀ Search
File	Home Ins	ert Draw Page	e Layout Formulas	Data Revie	w View	Help		
X65			f <sub>x</sub>					
A	В	C	D	F	F	G	н	I.
Applie	d filters:	0	5	2				
Count	v cis Barry	, Bay, Berrien, Calho	oun, Cass, Charlevoix,	Chebovgan, Chi	ippewa, Clinto	n, or Delta		
1 CREAT	reddate is o	on or after 8/2/2022	12:00:00 AM and is be	efore 9/17/2023	12:00:00 AM			
2								
3 Year	🔻 Quarte	r 🔻 Month 🛛 💌	Week Start Date 💌	Day 🔽 N	lew 🔽 Con	npleted 💌	Need Met 💌	Need Not Met 💌
4 2022	Q3	August	07/31/2022	08/03/2022	1			
5 2022	Q3	August	08/07/2022	08/08/2022	4			
6 2022	Q3	August	08/07/2022	08/10/2022	2	2	2	
7 2022	Q3	August	08/14/2022	08/19/2022	1			
8 2022	Q3	August	08/21/2022	08/26/2022	1	I		
9 2022	Q3	August	08/28/2022	08/29/2022	6	2	2	
10 2022	Q3	August	08/28/2022	08/30/2022	7			
11 2022	Q3	August	08/28/2022	08/31/2022	1	1		1
12 2022	Q3	September	08/28/2022	09/01/2022	3	1		1
13 2022	Q3	September	08/28/2022	09/02/2022	2			
14 2022	Q3	September	09/04/2022	09/06/2022	4	I		
15 2022	Q3	September	09/04/2022	09/07/2022	1	1		1
16 2022	Q3	September	09/04/2022	09/08/2022	1			
17 2022	Q3	September	09/11/2022	09/13/2022	1			
18 2022	Q3	September	09/11/2022	09/14/2022	2			
19 2022	Q3	September	09/11/2022	09/15/2022	1			
20 2022	Q3	September	09/11/2022	09/16/2022	6	I		
21 2022	Q3	September	09/18/2022	09/19/2022	2			
22 2022	Q3	September	09/18/2022	09/21/2022	2			
23 2022	Q3	September	09/25/2022	09/28/2022	10			
24 2022	Q3	September	09/25/2022	09/30/2022	1			
25 2022	Q4	October	10/09/2022	10/10/2022	1			
26 2022	Q4	October	10/09/2022	10/11/2022	1			
27 2022	Q4	October	10/09/2022	10/12/2022	2			
28 2022	Q4	October	10/09/2022	10/13/2022	2			
29 2022	Q4	October	10/23/2022	10/27/2022	6			
30 2022	Q4	October	10/23/2022	10/28/2022	50			
31 2022	Q4	November	10/30/2022	11/02/2022	1			
32 2022	Q4	November	11/06/2022	11/08/2022	1			
33 2022	Q4	November	11/06/2022	11/09/2022	2			
34 2023	Q1	January	01/22/2023	01/24/2023	1			
35 2023	Q2	May	05/07/2023	05/08/2023		2	2	
36 2023	Q3	July	07/09/2023	07/13/2023	1	2	2	
37 2023	Q3	September	09/03/2023	09/06/2023	1			



SHOW AS A TABLE

1. Click the More Options icon.



Notice the graph opens in a new page.



**Note:** This new view shows the same data seen in the table on your original reports page.

**Tip:** To get a full copy of the image:

• Use the **Snipping Tool** from your computer or the **Print Screen** (Prt Sc) function on your keyboard to copy the full image of the table.

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## 3. To return to the Reports page, click the **Back to Report** button.

<	Back to report	APP	LICATIONS	BREAKDOWN														
Туре			Appl	ly For Benefit	ts								Total					
Year	Submissions	Single	Multiple	Healthcare	FAP	Cash	CDC	SER	WIC	Submissions	Single	Multiple	Healthcare	FAP	Cash	CDC	SER	WIC

#### Notice you are now returned to the original reports page.

Referrals - Last 18 Months All widgets on this ta	b are refreshed daily. Last refreshed on: 11/29/2023
Select a Date 7/24/2022 11/6/2023	Counties     Zip Codes       Multiple selections     Image: All
Referral Breakdowr ↑ ↓ ↓ ♠ @ ₹ 8 ···· ●New ●Completed ●Need Met ●Need Not Met	Reasons Needs Were Unmet         Year       Client didn't come to appointment       Client no longer has this         2022       0.09
120 120 120 120 120 120 120 120	Total 0.09
00 Stat	Multiple Referrals by Same Client Year 1 2 3 4+
$\frac{2}{20}$ 7 4 3 6 4 4	2022         22         3         5         8           2023         4         1         1
2022 2023	

#### SPOTLIGHT

1. Click the More Options icon.



# 2. Select **Spotlight** from the dropdown menu.





# **View Metrics**

Notice the graph is now spotlighted, with the other information on the reports page greyed out.

Referral Breakdow: ↑ ↓ ↓ ♠								
New      Completed      Need Met      Need	d Not Met Year Client didr							
2518								
2,500								
2,000			16.58					
දි 1,500								
al St								
່ມສູ່ 1,000 707	Year							
500 360								
136 <sup>232</sup> 126	2023							
0	2024							

# 3. To exit out of this function, click outside the box.





Notice you are now returned to the original reports page.

- Last 18 Mon	ths All widg	ets on this tab a	re refr	eshed daily. I	.ast refreshed	l on: 11/2	9/2023					
Select a Dat	e		Cοι	Inties		Zip Co	odes					
7/1/2022	1/4/2024		All		$\sim$	All		$\sim$				
$\cup$		$\cup$										
Referral Bre	akdown	F	Reaso	ns Needs \	Nere Unm	et						
●New ●Comp	●New ●Completed ●Need Met ●Need Not Met			Year Client didn't come to appointment Client no longer has th								
2	518		2022			11.95						
2,500			2023			4.62						
t 2000			2024									
Court			Total			16.58						
រារ្ល 1,500												
al St		ſ	Multi	ple Referra	ls by Same	Client						
່ມີ 1,000	707		•	Year	1	2	3	4+				
			2022		249	25	11	88				
500	<sup>232</sup>		2023		140	22	12	43				
0	2022 2023	1 1	2024		2			2				
	2022 2023 4	2024										

#### SORT BY

1. Click the More Options icon.



# 2. Hover over Sort Axis from the dropdown menu.





Notice a second dropdown appears with options to sort the data in the graph.

From the dropdown menu you can sort the data by different data points available on the table.

3. Click an **Axis** to sort by.



Notice that the graph is now sorted by the axis selected in **Ascending** order.



4. To sort by **Descending** order, click the **More Options** icon.





5. Hover over **Sort Axis** from the dropdown menu.



#### 6. Click the **Ascending** order button.

<b>Referral Bre</b>	akdown		Reasons Nee	ds Were Unmet		
●New ●Compl	eted ●Need Met ●Need Not Met	6 (1) (2) (2) (2) (2) (2) (2) (2) (2) (2) (2	Export data Show as a table Spotlight	n't co	ome to appointmer	
2,500	518	0	Get insights Sort axis	H	Year	
2,000			2024 <b>Total</b>		New Completed Need Met	
al Status 1'200 —		-	Multiple Ref	✓ Ž↓ Ž↓	Need Not Met Sort descending Sort ascending	

Notice the table is now sorted by the axis selected **Ascending** order.



# 7. To remove the sorting, click **More Options**.





8. Hover over **Sort Axis** from the dropdown menu.



9. Click the **Axis with the Check Mark** to deselect the sorting.



#### FILTER BY YEAR

1. Click a **Year** at the bottom of the graph.





Notice all the tables are in the tab are also filtered by year.



# 2. To remove the filter, deselect the Year selected.



Notice the filter has now disappeared.

