



State Chapter Module

December 2023



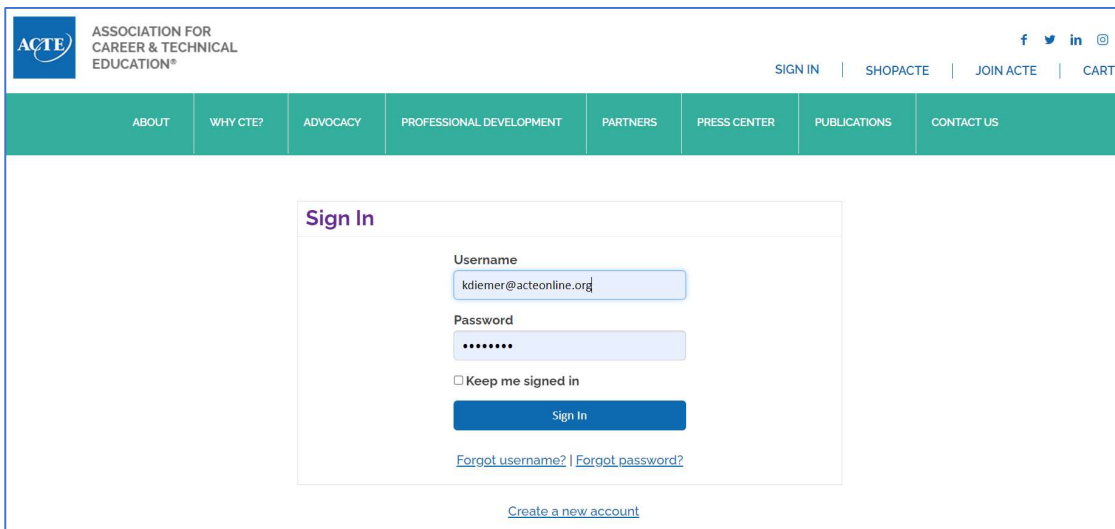
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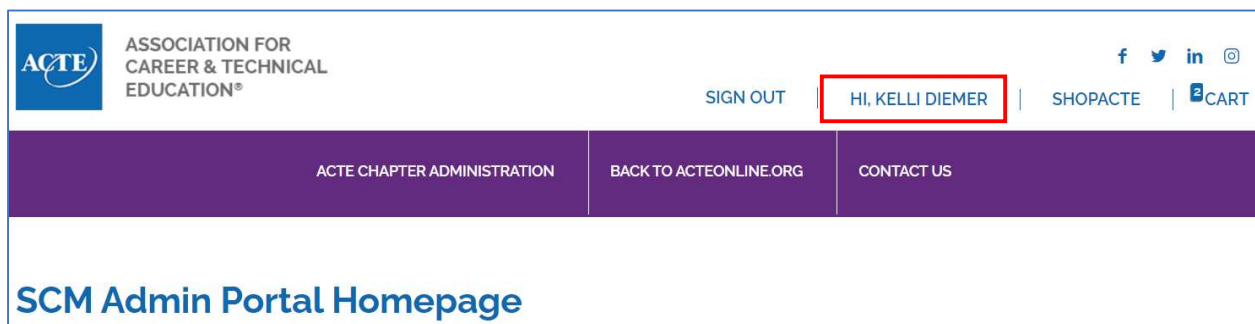
Logging into SCM

Go to: 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 Kelli Diemer for information.

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



State Chapter Module Main Screen

The descriptions of available Chapter Reports are listed on the main screen.

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 Financial Detail Report (ACH)** - Report showing the state's ACH monthly deposit.
- **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.

To open a report, choose from the dropdown menu for the Selected Report.

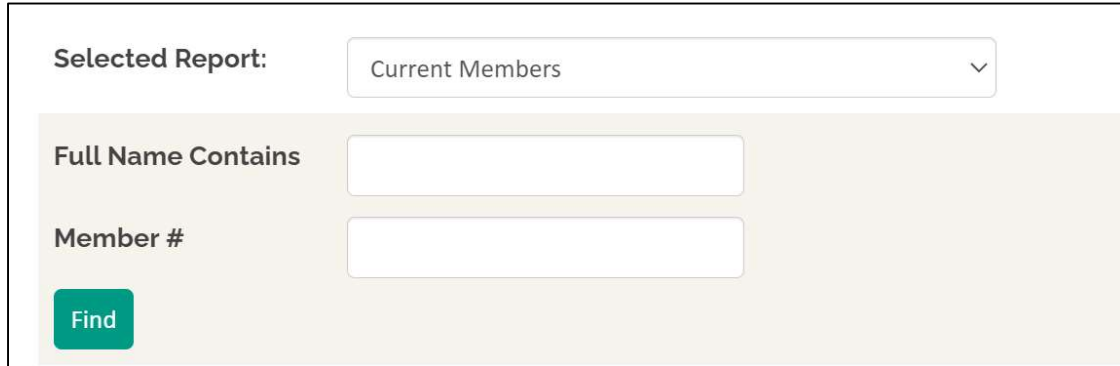
The screenshot displays the 'Selected Report' dropdown menu. The selected report is 'Current Members'. The dropdown menu is open, showing a list of reports under the heading 'Dashboard Queries'. The reports listed are:

- 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 (Current) with No Email Address
- Roster Listings with No Mailing Address
- State members who attended ACTE national events(Activity)
- State non-members who attended ACTE national events(Activity)
- State Financial Detail Report (ACH) - NEW!
- State members who attended ACTE national events

The interface also shows search filters for 'Full Name Contains' and 'Member #', a 'Find' button, and a table with columns 'Id' and 'Last Name'. The table contains one entry: Id: 504178, Last Name: Abatti-Fitzurka.

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.



A search form with a dropdown menu for 'Selected Report' set to 'Current Members'. Below are two input fields: 'Full Name Contains' and 'Member #'. A green 'Find' button is at the bottom left.

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. *If the address is missing on the preferred mailing, billing or shipping address, the member will not be receiving mailed correspondence from ACTE.*



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).

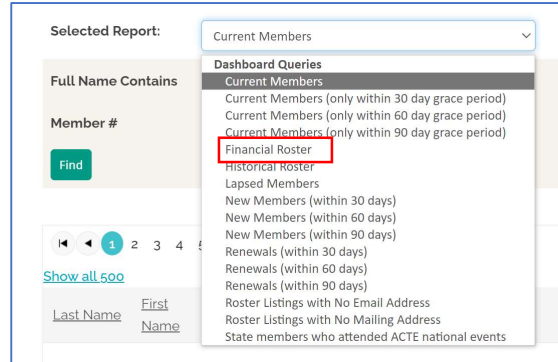
4. Current Members (only within 90-day grace period)

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

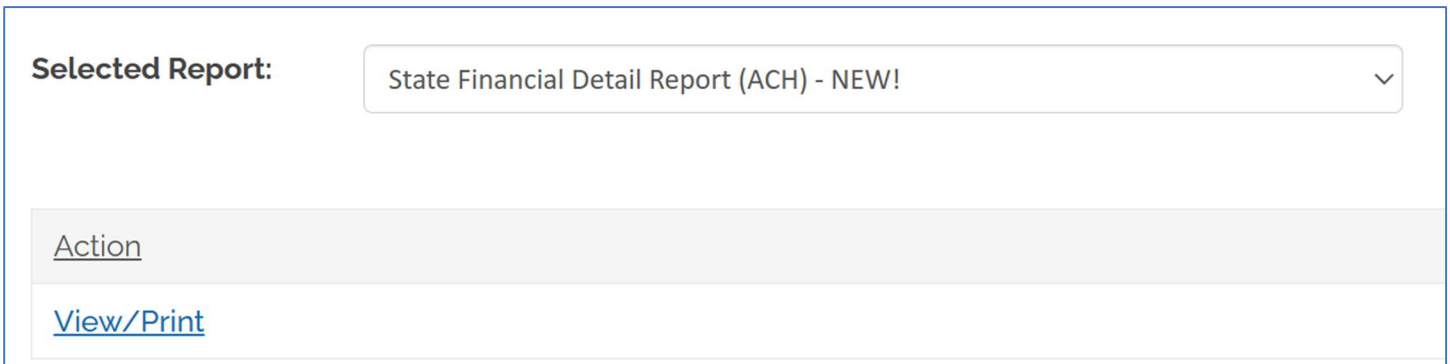


The Financial Roster report gives you the option of searching for transactions between dates or for a member (by membership number). The Financial Roster report shows ALL transactions from a member including those to ACTE.

St Id	First Name	Last Name	Title	School/Bus Email	Description	Transaction Date	Amount Pa	Paid Thru
526412					ACTE Membership Dues	10/23/2023	\$80.00	1/31/2025
526412					ACTE Postsecondary Adult and Career Education	10/23/2023	\$0.00	1/31/2025
526412					CA-California Assn for Career & Technical Education	10/23/2023	\$29.00	1/31/2025
526412					Freight	10/20/2023	\$144.90	

2. The State Financial Detail Report

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



Put in the appropriate end of month date to run the State Financial Detail Report (ACH) – NEW! and select Run Report.

Apply Filters ✕

Field	Operator	Value
Month-End Date	Equal To	<input type="text"/> 📅 fx ▼

Run Report
Cancel

The report runs as a pdf but can be exported in a spreadsheet format is needed. This report shows only the amounts paid to the state association and will match the ACH monthly deposit.

Page 1 of 2
Export Find Text

State Financial Detail for New and Renewing Members Month Ending 11/30/2023

CA ID	Full Name	Full Address	School	Work Phone	Work Fax	Home Phone	Email	Member Type	Division	Payment	Balance	Date Paid	Paid Thru
											\$261.00		
538557								Professional Member	CA-California Assn for Career & Technical Education	\$29.00		11/12/2023	10/31/2024
538343								Professional Member	CA-California Assn for Career & Technical Education	\$29.00		11/7/2023	10/31/2024
539010								Professional Member	CA-California Assn for Career & Technical Education	\$29.00		11/21/2023	10/31/2024



Historical Roster

Records can be searched 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:

Joined After

Full Name Contains

Member #

Page: of Page size:

[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>
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Lapsed Members

Anyone in our database that has 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:

Paid Through Between and

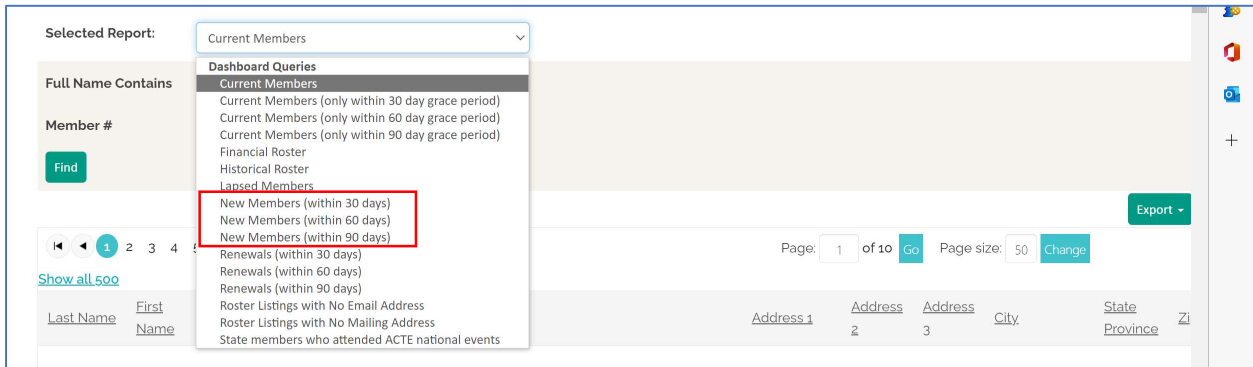
Member #

Page: of Page size:

[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 Province</u>
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New Member Reports



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 use the slide bar at the bottom of the window). By clicking on the column heading, the data sorts by the column information.

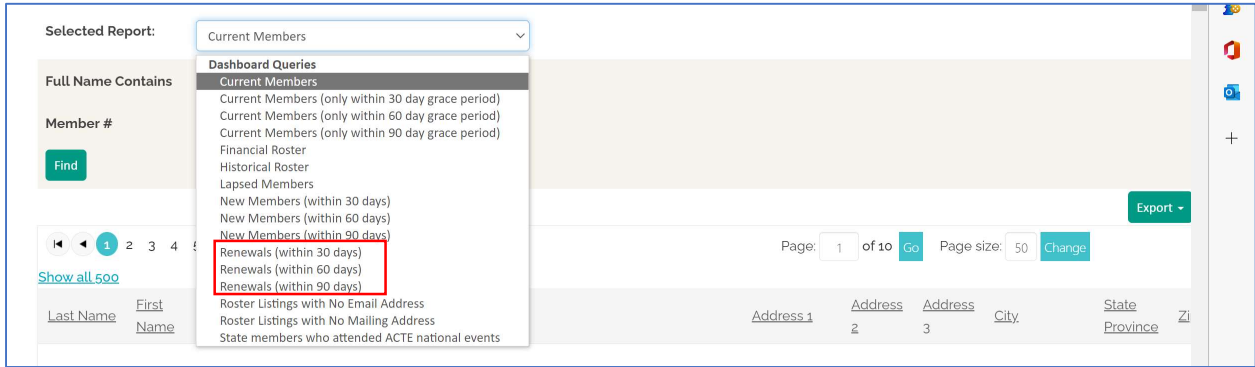
2. New Members (within 60 days)

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 use the slide bar at the bottom of the window). 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 use the slide bar at the bottom of the window). By clicking on the column heading, the data sorts by the column information.

Renewal Reports



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
		8/1/2016	
8/8/2022	DIST	0:00	7/31/2022
		7/1/2022	
7/20/2022	DIST	0:00	6/30/2023
		7/1/2017	
8/4/2022	DIST	0:00	6/30/2023
		7/1/2022	
7/27/2022	DIST	0:00	6/30/2023
		9/1/2008	
7/25/2022	DIST	0:00	9/30/2023
		7/1/2022	
7/25/2022	DIST	0:00	6/30/2023
		9/1/2016	
8/2/2022	DIST	0:00	8/31/2023
		7/1/2017	
7/12/2022	DIST	0:00	6/30/2023
		7/1/2022	
7/25/2022	DIST	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
		8/1/2016	
8/8/2022	DIST	0:00	7/31/2022
		3/1/2017	
6/27/2022	DIST	0:00	5/31/2023
		8/1/2016	
6/23/2022	DIST	0:00	5/31/2023
		7/1/2017	
8/4/2022	DIST	0:00	6/30/2023
		9/1/2008	
7/25/2022	DIST	0:00	9/30/2023
		9/1/2016	
8/2/2022	DIST	0:00	8/31/2023
		8/1/2016	
7/5/2022	DIST	0:00	7/31/2023
		12/3/2020	
6/29/2022	DIST	0:00	5/31/2023
		7/1/2017	
7/12/2022	DIST	0:00	6/30/2023
		6/1/2022	
6/23/2022	DIST	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 0:00	3/31/2023
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
5/28/2022	DIST	7/1/2016 0:00	6/30/2023
5/27/2022	DIST	5/1/2021 0:00	4/30/2023
5/30/2022	DIST	2/9/2021 0:00	5/31/2023
7/5/2022	DIST	8/1/2016 0:00	7/31/2023
6/29/2022	DIST	12/3/2020 0:00	5/31/2023
5/16/2022	DIST	6/1/2020 0:00	5/31/2023
7/12/2022	DIST	7/1/2017 0:00	6/30/2023



Missing Member Information Reports

1. Roster Listing with No Email Address

Selected Report:

Member #

Page: of Page size: 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
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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:

Member #

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

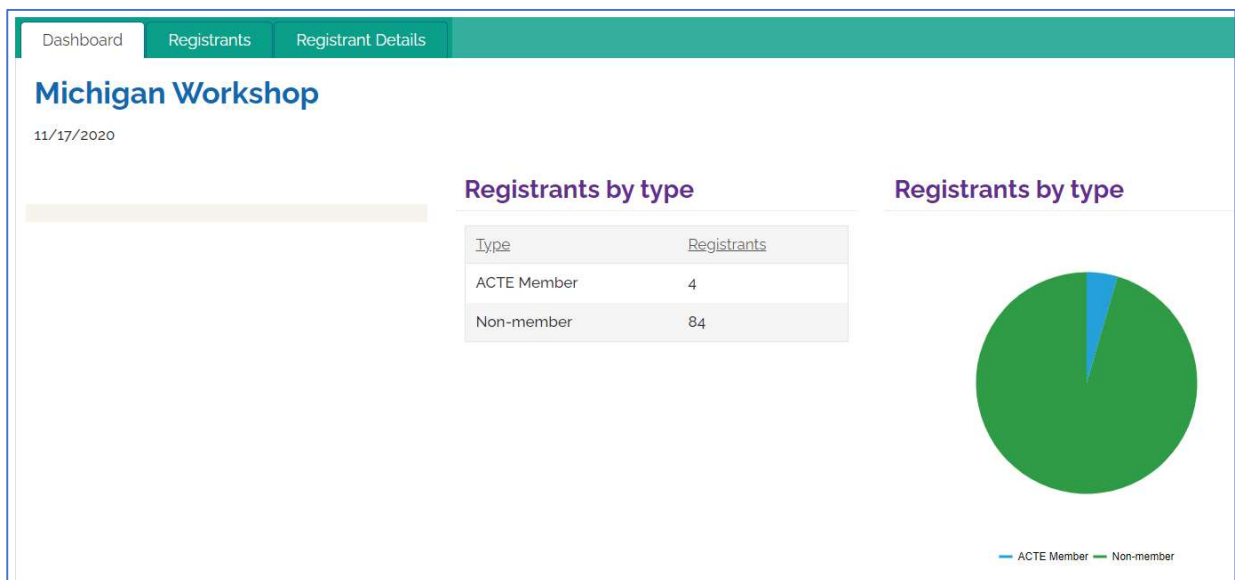
Chapter-Sponsored Event Dashboards

Chapter-Sponsored Event Dashboards

In some instances, ACTE manages registration for a state event. In those cases a dashboard with event information is created and accessible through the SCM.

ACTE CHAPTER ADMINISTRATION			BACK TO ACTEONLINE.ORG			CONTACT US		
ACTE Chapter Administration » MyACTE Chapters » Chapter Management						Export		
Event	Begin Date	End Date						
CTE Summer Leadership Conference	08/02/2021	08/03/2021						
CTE Summer Leadership Conference - 2022	08/03/2022	08/05/2022						
Classroom Management Tips and Resources	09/16/2021							
New CTE Teacher Workshop	10/13/2021	10/13/2021						
Michigan Workshop	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

Export

Page: 1 of 4 Go Page size: 25 Change Item 1 to 25 of 100

Show all 100

Registrant	Organization	Title	Email	Date registered
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State Members Who Attended ACTE National Events

For ACTE National Events prior to CareerTech VISION 2023, this information is available in the reports **State members who attended CTE national events & State non-members who attended ACTE national events**.

For ACTE National Events (CareerTech VISION 2023 to current), this information is available in the reports **State members who attended ACTE national events (Activity) & State non-members who attended ACTE national events (Activity)**.

Selected Report: Current Members

Full Name Contains

Member #

Find

1 2 3 4

Show all 328

Id Last Name

504178 [Abatti-Fitzurka](#)

- 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 (Current) with No Email Address
- Roster Listings with No Mailing Address
- State members who attended ACTE national events(Activity)
- State non-members who attended ACTE national events(Activity)
- State Financial Detail Report (ACH) - NEW!
- State members who attended ACTE national events
- State non-members who attended ACTE national events
- Areas of Interest Rosters**
- Current Members - Arts, Media and Entertainment
- Current Members - eSports
- Current Members - IT
- Current Members - Marketing

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(Activity) Export

Date	ACTE National Event	Number of attendees	Click to view registrants
12/1/2023	CareerTech Vision and Expo 2023	104	View Registrants



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	View Registrants
11/30/2022	CareerTech Vision and Expo 2022	11	View Registrants
10/16/2022	Alaska ACTE PDC: Growing Stronger Together 2022	1	View Registrants
9/28/2022	2022 Best Practices and Innovations Conference	1	View Registrants
6/9/2022	Butler Tech Good Trouble: Busting IAED Barriers in CTE	1	View Registrants
4/28/2022	2022 ACTE-Utah Work-Based Learning Conference	2	View Registrants
3/21/2022	National Policy Seminar 2022	11	View Registrants
12/1/2021	CareerTech Vision and Expo 2021	84	View Registrants
9/30/2021	2021 Best Practices and Innovations Conference	3	View Registrants
9/24/2021	2021 Hybrid Region II Leadership Conference	9	View Registrants
9/23/2021	IN ACTE Conference 2021 Sponsorship	1	View Registrants

To see list of registrants, choose View Registrants.

CareerTech Vision and Expo 2023

Export

First Name	Last Name	Title	Company	Email	Phone	Registration Date	Total Charges	Total Payme
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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

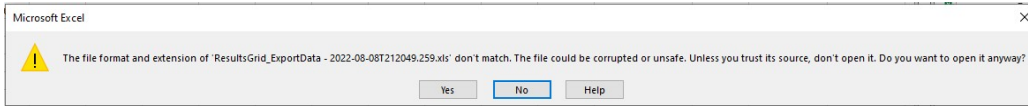
Id	Last Name	First Name	Title	School/Business	Email	Address 1	Address 2	Address 3	City	State	Zip	Work Phone	Home Phone	Paid Through
Instruction														

Export options: Word, Excel, PDF, CSV, XML

The **Word export** –

<u>Id</u>	<u>Last Name</u>	<u>First Name</u>	<u>Title</u>	<u>School/Business</u>	<u>Email</u>
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The **Excel export** brings up a warning message.



A	B	C	D	E	F	G	
1	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 Purpose	Work Phone	Home Phone	Paid Through
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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
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The **XML export** brings up an error.

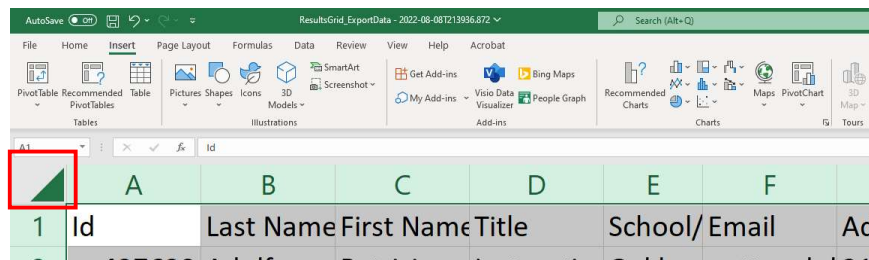


Spreadsheet Filters, Text Filters, and Sort Functions

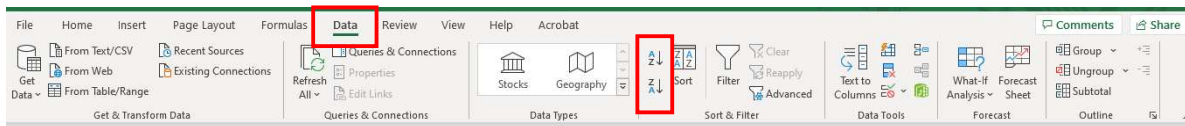
To widen a column in a CSV export, double click on the line between the columns (E and F).

	E	F	
	School/ Email	Ad	

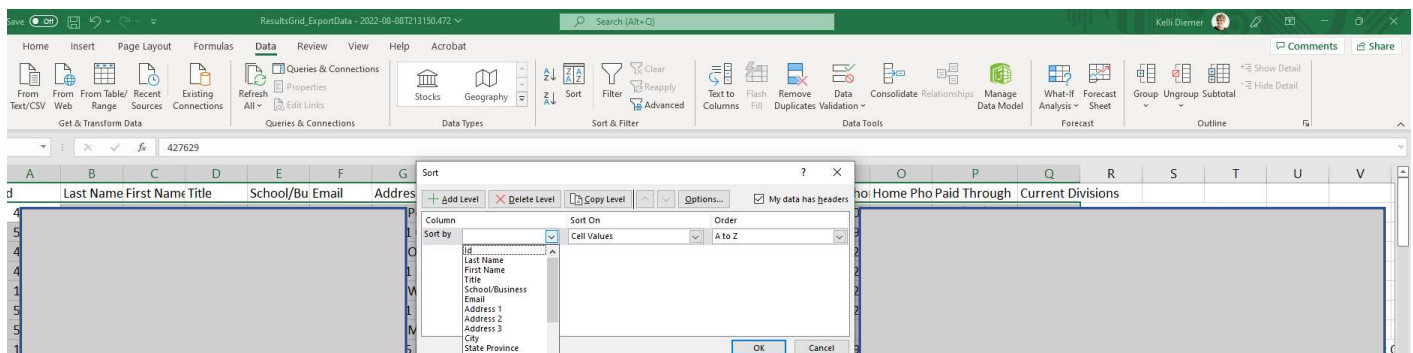
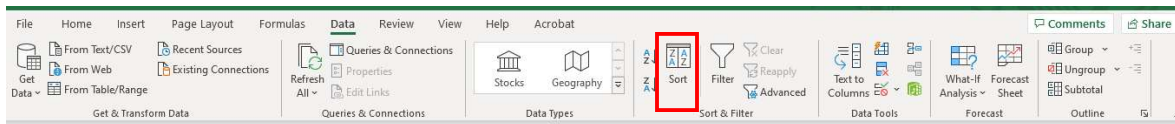
By clicking on the **top left space**, you can quickly highlight the entire spreadsheet. This enables you to choose Filter for all columns and rows of the spreadsheet.



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

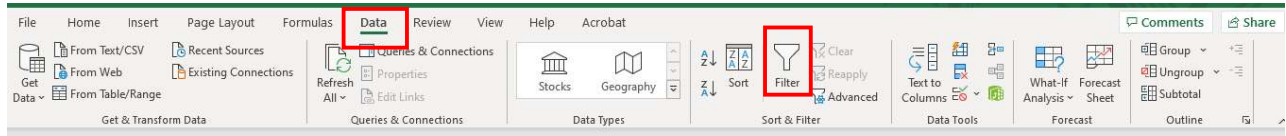


To sort by multiple columns, choose the sort option.

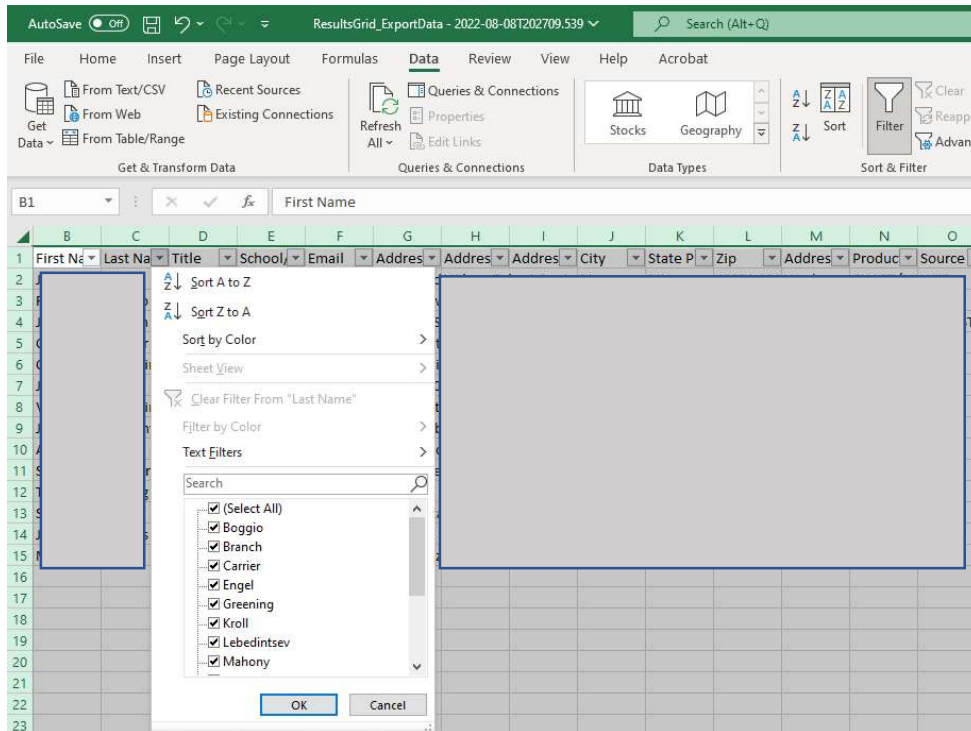




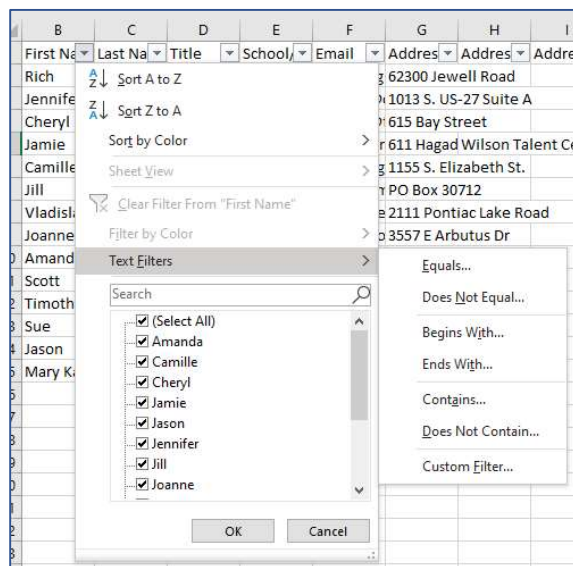
Filter function is under the dropdown Data menu.



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.

The screenshot shows an Excel spreadsheet with the following columns: First Nat, Title, Email, Address, City, State Pri, Zip, Address, Work PH, Home Pl, Paid Throu, Current Divisions. The 'Current Divisions' column is filtered, and a dropdown menu is open. The menu includes options like 'Sort A to Z', 'Sort Z to A', 'Sort by Color', 'Text Filters', and 'Custom Filter...'. The 'Text Filters' option is selected, and a list of filters is shown, including '(Select All)', 'ACTE Administration Division', and 'ACTE Administration Division; ACTE Work-Based Learning'.

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.

The screenshot shows an Excel spreadsheet with the following columns: Title, Email, Address, City, State Pri, Zip, Address, Work PH, Home Pl, Paid Throu, Current Divisions. The 'Current Divisions' column is filtered, and a dropdown menu is open. The menu includes options like 'Contains', 'And', 'Or', and 'Custom Filter...'. The 'Contains' option is selected, and a list of filters is shown, including 'Work-Based Learning' and 'Business'.



Spreadsheet Grouping, Subtotals, and Grand Totals

Financial Roster Reports

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

Selected Report:

Transaction Date Between and

Member #

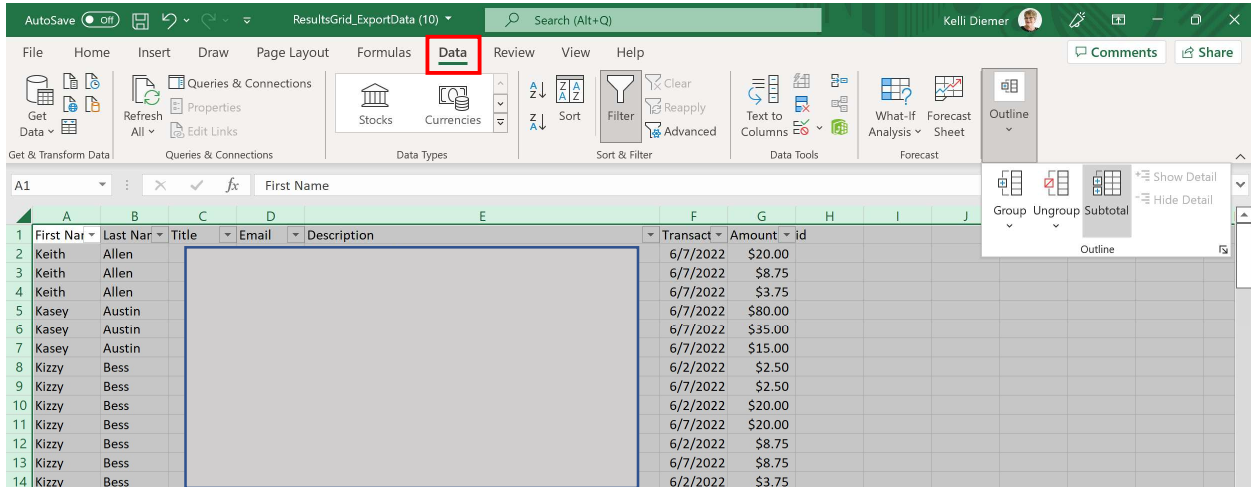
Choose the **select all** to highlight all rows and columns. Turn on the filter for the report.

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

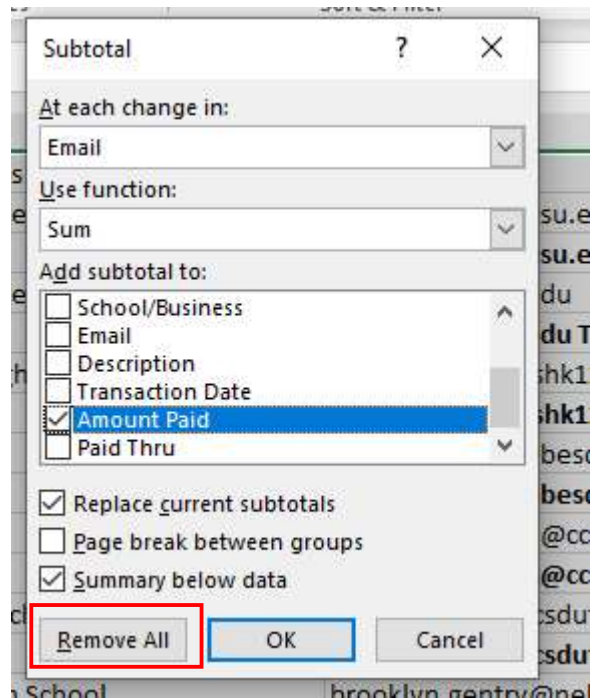
At this point, it is important to sort your data by the appropriate field (usually the email field to keep individual's records together).



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.

The Subtotal dialog box is configured as follows:

- At each change in: Email
- Use function: Sum
- Add subtotal to:
 - Title
 - Email
 - Description
 - Transaction Date
 - Amount Paid
- Replace current subtotals
- Page break between groups
- Summary below data

This will give you subtotals by individual -

First Name	Last Name	Title	Email	Description	Transact	Amount	id
				ACTE Membership Dues	6/7/2022	\$20.00	
				GA-Georgia Association for Career & Technical Educ	6/7/2022	\$8.75	
				Georgia ROTC Section	6/7/2022	\$3.75	
BobJones.gmail.com Total							\$32.50
				ACTE Membership Dues	6/7/2022	\$80.00	
				GA-Georgia Association for Career & Technical Educ	6/7/2022	\$35.00	
				Georgia Work Based Learning (WBL/YAP)	6/7/2022	\$15.00	
NancyJones.gmail.com Total							\$130.00
				ACTE Family & Consumer Sciences Ed Division	6/2/2022	\$2.50	
				ACTE Family & Consumer Sciences Ed Division	6/7/2022	\$2.50	
				ACTE Membership Dues	6/2/2022	\$20.00	
				ACTE Membership Dues	6/7/2022	\$20.00	
				GA-Georgia Association for Career & Technical Educ	6/2/2022	\$8.75	
				GA-Georgia Association for Career & Technical Educ	6/7/2022	\$8.75	
				Georgia Business Education Division	6/2/2022	\$3.75	
				Georgia Business Education Division	6/7/2022	\$3.75	
				Georgia Family and Consumer Sciences Education Division	6/2/2022	\$3.75	
				Georgia Family and Consumer Sciences Education Division	6/7/2022	\$3.75	
PeteJones.gmail.com Total							\$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.

The screenshot shows the Microsoft Excel interface with the 'Data' ribbon selected. The ribbon includes options for 'Get & Transform Data', 'Queries & Connections', 'Data Types', 'Sort & Filter', and 'Data Tools'. The 'Filter' button is highlighted. Below the ribbon, the formula bar shows 'A1'. The spreadsheet grid shows columns A through G. Row 1 is the header row with columns: First Name, Last Name, Title, Email, Description, Transaction, and Amount. A detail view is collapsed for the 'Description' column, showing a list of email addresses and their total amounts: BobJones@gmail.com Total (\$32.50), NancyJones@gmail.com Total (\$130.00), and PeteJones@gmail.com Total (\$77.50). The cell containing the number '2' in the top-left corner of the grid is highlighted with a red box.

	A	B	C	D	E	F	G
1	First Name	Last Name	Title	Email	Description	Transaction	Amount
5					BobJones@gmail.com Total		\$32.50
9					NancyJones@gmail.com Total		\$130.00
20					PeteJones@gmail.com Total		\$77.50

