

## Use Excel to display recorded values for audit, forms, and checklist reports on one row

Although you can configure your Helm CONNECT reports to display the actual values recorded in a checklist, audit, or form, they'll appear in separate rows which may not be the format you want. This article will show you how to use Microsoft Excel to transform your data so the values appear on one row for each individual audit, form, or checklist.

You can use this procedure to transform exported reports for the following Helm CONNECT data sources:

- Audits
- Forms
- Inspection Checklists
- Inventory Checklists
- Maintenance Checklists



### Note

We tested the procedure in this article in Microsoft Excel for Office 365 and Excel 2019. We can't guarantee it works with older versions.

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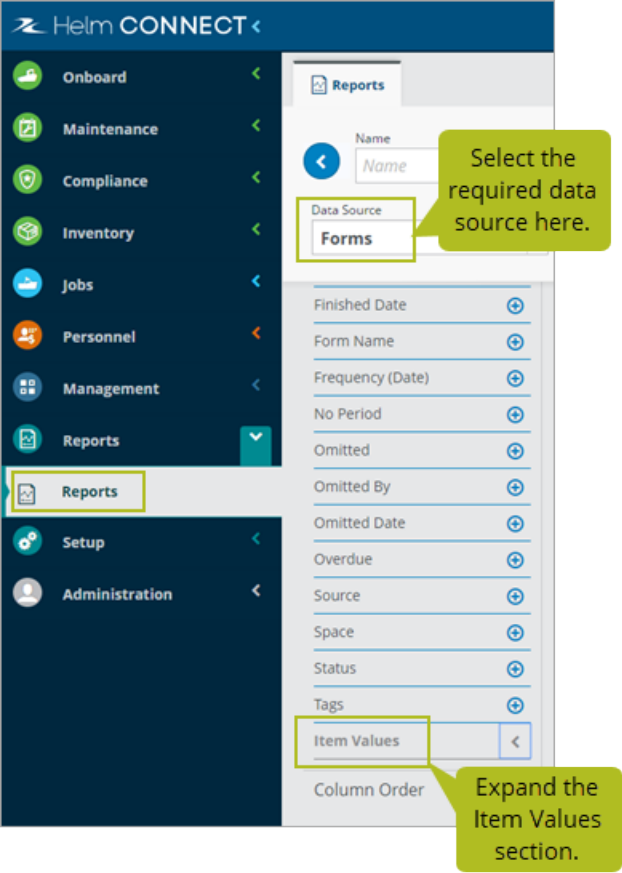
## Generate and export the required report

The first thing you'll do is create a report that includes your key fields, and then export it from Helm CONNECT.

### To generate and export the required report

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1. In **Reports > Reports**, click **New Report** or select an existing report.
2. If you create a new report, in the **Name** field, enter a name.
3. Set the required **Date Range** for the report.
4. Use the filters to narrow the report to display only the information you need.
5. From the **Data Source** list, select the required report type.



6. From the list on the left, select the fields you want to include in the report. See the "Tips for making your report" section below.
7. Click **Save Changes**.
8. Copy the **CSV connection string** value or click **Export to CSV** to export the report information.

### Tips for making your report

For clarity, we recommend that you limit the number of columns in your report and arrange the columns in the following order, from left to right:

- **Asset Name**
- **Date** (whichever one you want)
- **External Number** (if used)
- Any other items from the main section of the list that makes sense for the report
- **Item Values** fields

We also suggest that, in the Item Values group, you select only the items indicated below. If you select other items, the exported report may show more "null" values and require additional filtering.

The image displays five panels, each representing a different report type: Audits, Forms, Inspection Checklists, Inventory Checklists, and Maintenance Checklists. Each panel shows a list of configuration options under an 'Item Values' dropdown menu. Specific items are highlighted with yellow boxes and numbered 1, 2, or 3, indicating the recommended selections for the report.

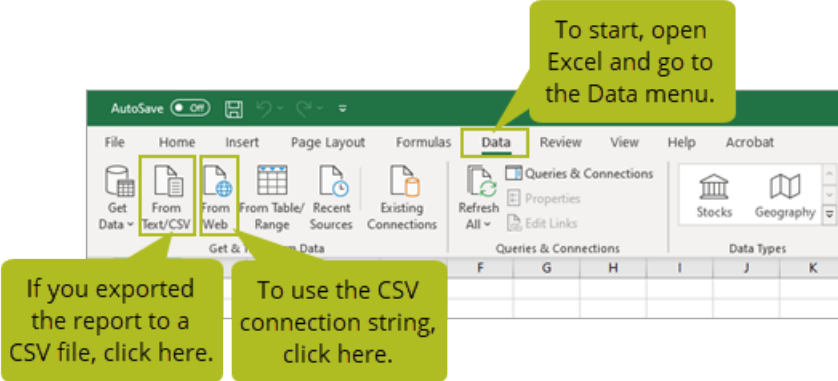
- Audits:** Value (2), Description (1), Item Number, Type, Template Category.
- Forms:** Item Description (1), Value (2), Value Range.
- Inspection Checklists:** Value (2), Template Item Description (1).
- Inventory Checklists:** Count (2), Part Description (1), Part Number, Part Unit, Required, Template Category Name, Template Item Description, Template Item Number, Template Item Type, Template Item Value Range.
- Maintenance Checklists:** Component Name (1), Template Item Description (2), Value (3).

## Transform the exported report with Power Query

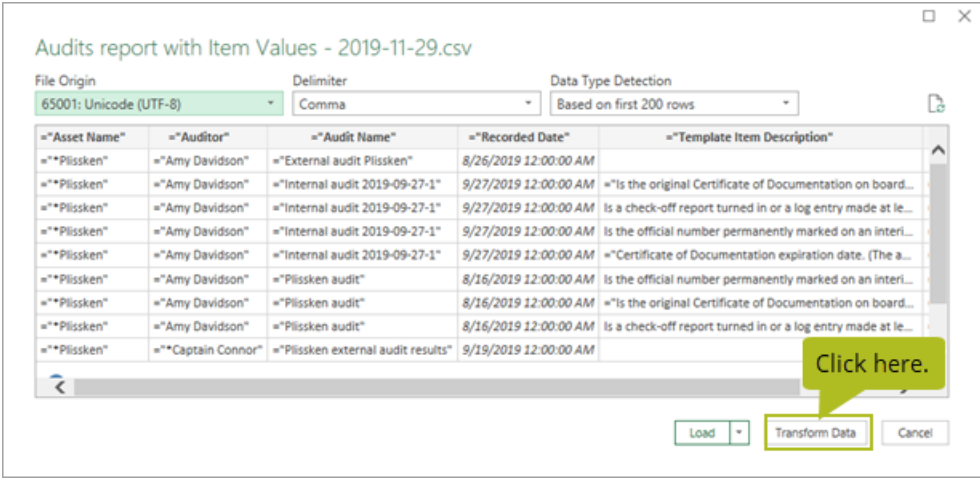
Once you've generated and exported your report, you'll use the Power Query tool in Microsoft Excel to transform the data in the exported report.

### To transform the exported report with Power Query

1. In Microsoft Excel, click the **Data** menu.

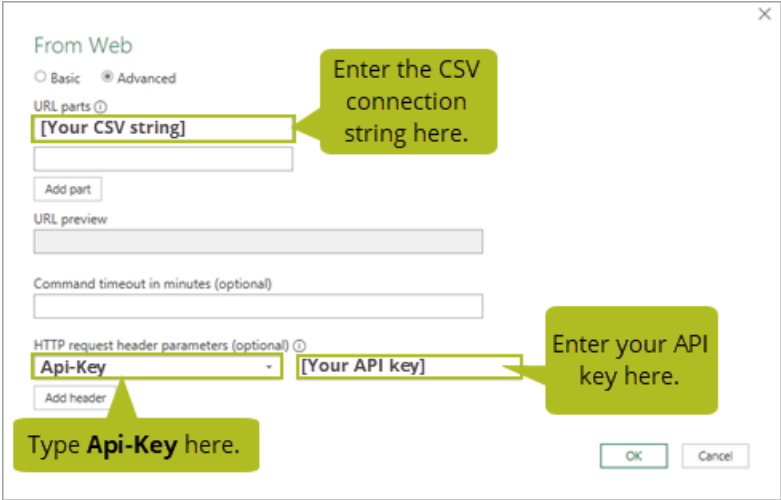


2. Select one of the following options:
  - If you exported the report from Helm CONNECT to a CSV file, click **From Text/CSV**, locate the exported file, then click **Import**. When the preview window appears, click **Transform Data**.

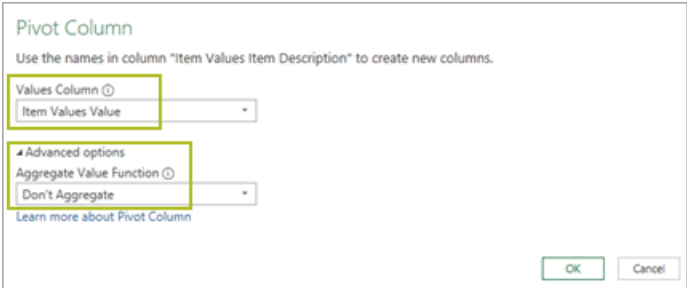


- If you are using the CSV - connection string, click **From Web**. In the window that

appears, paste the CSV connection string value, then click **OK**.



- 3. In the Power Query Editor window, click the **Description** header (the label for this header might be something different).
- 4. On the **Transform** toolbar, click **Pivot Column**.
- 5. In the **Pivot Column** window do the following:
  - a. In the **Value Column** list, select the **Value** field (for Inventory Checklists this will be the Count field).
  - b. Expand **Advanced options**. From the **Aggregate Value Function** list, select **Don't Aggregate**.
  - c. Click **OK**.



Each row now displays the information for one completed item (checklist, audit, or form) for one asset.

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6. On the **Home** toolbar, click **Close and Load** to display the transformed file in Excel.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Audit Name	Filed Date	Extent Number	Date	Start Time	End Time	Crew Attenders	Safety Topics Covered	Review all safety alerts	Meeting Lead	Safety certified	Topics Discussed	Deficiencies Noted	Captain	Mate	Date Reviewed	Corrective Actions
*Pissken	12/9/2018 15:46	22	12/9/2018	8:00	8:30	Brian Baker	Fall Overboard	done	Deckhand		TBD	No deficiencies noted	Brian Baker	Amy Davidson	12/17/2018	
*Pissken	1/26/2019 15:30	28	1/26/2019	8:00	8:00	Tyrel Sular, Fred Johnson, Allison McGregor, Shaun Christmas, Emma Runnells	First Fighting/Fire Prevention	done	Mate		Fire safety	No deficiencies noted	Tyrel Sular	Shaun Christmas	4/3/2019	
*Pissken	3/22/2019 15:46	35	3/21/2019	9:00	9:30	Chris Grayson	First Aid/CPR	done	Mate		First Aid	No deficiencies noted	*Captain Connor	Antonio Brown	3/31/2019	Nothing at this time
*Pissken	7/4/2019 9:47	44	6/1/2019	17:20	18:20	*Captain Connor, Amy Davidson, Antonio Brown, Allison McGregor	Company safety program	done	Captain	*Captain Connor	company program	No deficiencies noted	*Captain Connor	Chris Grayson	6/2/2019	na
*Pissken	8/7/2019 9:59	46	8/1/2019	0:00	1:00	Allison McGregor, Antonio Brown,	Spill Prevention	done	Captain	*Captain Connor	Spill prevention	No deficiencies noted	*Captain Connor	Kyle B. Carney		
MJ Jonathan	1/25/2019 16:04	29	1/25/2019	8:00	8:00	Calvin Kennedy, Diego Velazquez, Gerald Miller	Spill Prevention	done	Mate		N/A	No deficiencies noted	Calvin Kennedy	Sheev Hernandez	4/5/2019	

7. (Optional) Use Excel's filters to further refine the display of information.

8. Save the transformed file.



### Note

If the exported report has a number of blank fields, or a large number of component-specific fields, you could end up with more than one row per audit, form, or checklist instance, and there could be a large number of cells that contain "null". This is okay and expected, but not so easy to read. This is the main reason we recommend selecting only specific fields under the Item Values group when you build your reports (see the "Tips for making your report" section above). You can use the filter tools in Excel to display and sort the information you want to see and hide the data you don't need. However, how to use the Excel filters is beyond the scope of this article.