Excel Tutorials for "RTK tracker template"
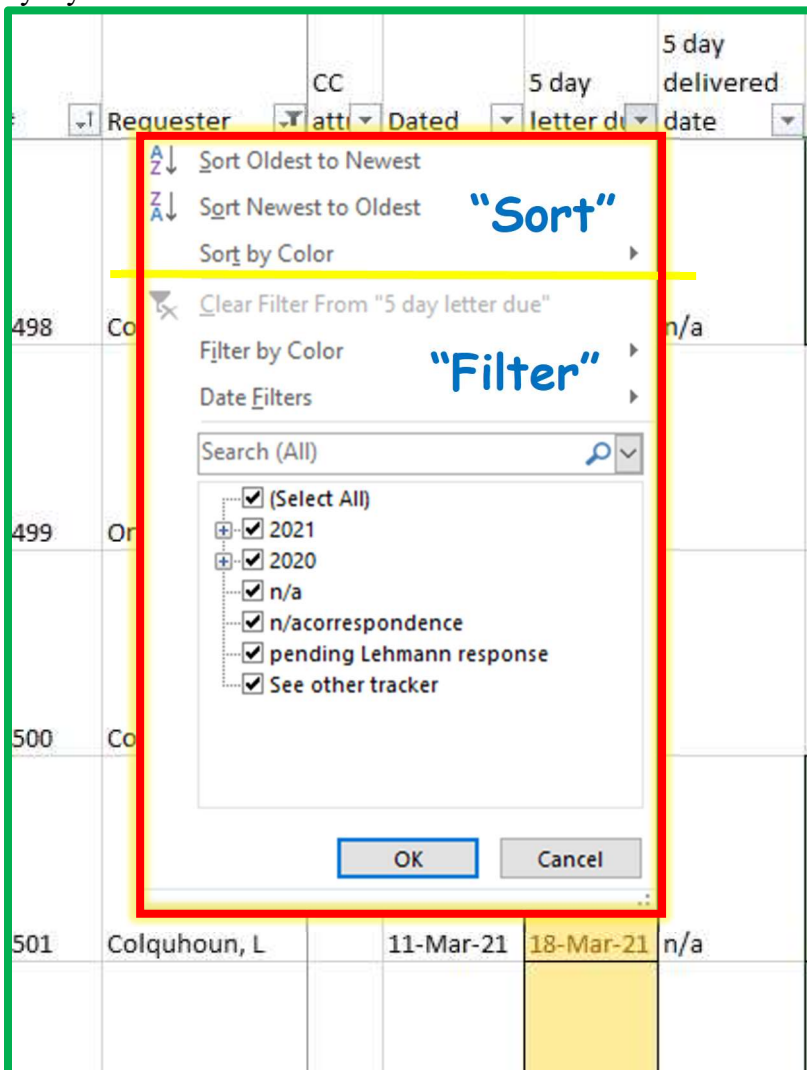
USING FILTER BUTTONS

First step is to click the sort/filter button (looks like upside-down triangle) at the top of **any** column in the table.

Req #		Requester		CC att	Dated		5 day letter du	5 day delivered date		"promis date
2021-498		Colquhoun, L			8-Mar-21		15-Mar-21	n/a		n/a

This opens the menu for all your options.
The menu is separated into 2 sections: SORT and FILTER (in the below picture I separated them by a yellow line

KEEP IN MIND – using a filter button on ANY column in the table will affect the WHOLE table.
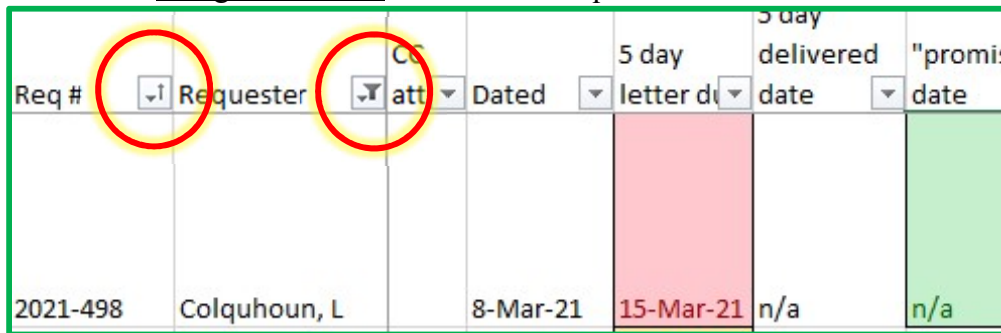
The specific criteria you select in the filter menu will determine one of two things:

1. If you select a **SORT** option: it will affect what order the rows are presented from top to bottom, based upon the information in that column (i.e.: oldest to newest, alphabetical).
2. If you select a **FILTER** option: it will determine whether or not a row is displayed, based upon information in that column.

Just a quick administrative point – you can have a FILTER running on **every** single column, but you can only SORT by one column.

You can tell which columns are FILTERING and which (single) column is SORTING the table by the icons shown in the buttons.
- The arrow icon shown on the button in the "Req #" column shows that column is SORTING
- While the triangle on a stick icon in the "Requester" column shows that column is FILTERING

Now for some examples:

SORTING

Say you want to display the rows of the table with the oldest dated requests at the top and the newest dated requests at the bottom.

First, you want to click the sort/filter button at the top of the "Dated" column to open the menu.

Req #	Requester	CC att	Dated	day letter d	5 day delivered date	"promise" date	request delivered date	further response neede	Dept. requested from	specific request
										Kindly supply me (12/11/2020-12/3
2021-435	Colquhoun, L		6-Jan-21	13-Jan-21	sent by JG	set by JG	14-Jan-21		CFO	
										Requesting copi September 25, 2
2021-436	Merit Const.		6-Jan-21	13-Jan-21	n/a	n/a	12-Jan-21		Engineering	
										"FYI - I do not wi You had Vern Ga Please forward t or provided to a
									Sarah	

Then in the menu select "Sort Oldest to Newest" at the top.

The rows will now be sorted based upon the information in the "dated" column with the oldest at the top and the newest at the bottom of the table.

FILTERING

Now let's say you want to find a request based upon the date it was delivered. For our example let's use February 17, 2021 (or 17-Feb-21 as I have it formatted)

First, select the sort/filter button at the top of the "request delivered date" column to open the menu.

Next deselect the (Select All) box in order to remove checks for all the check boxes

Then
   (1) Use the + buttons to expand the menu options,
   (2) Select the specific dates you want to display.
   (3) Click OK
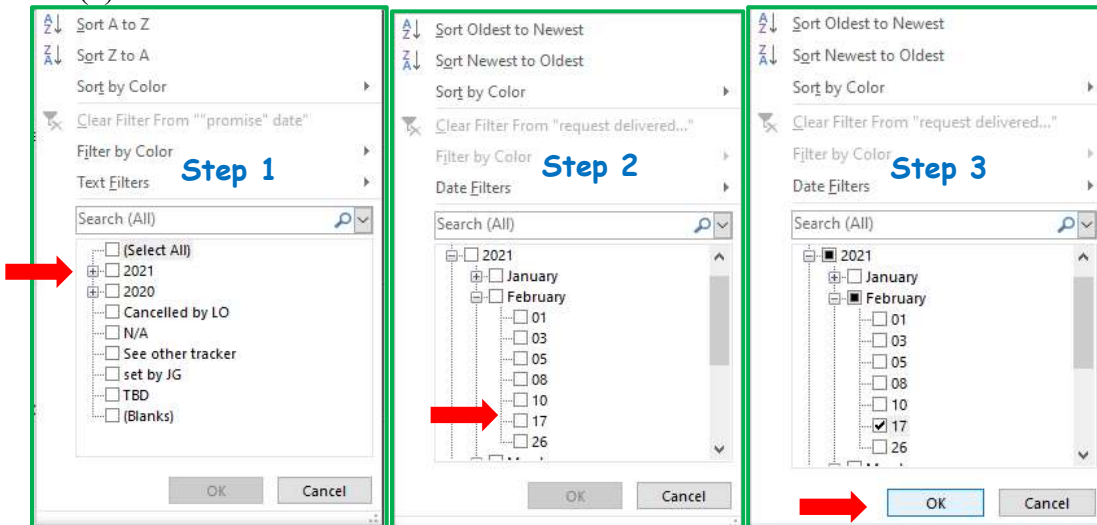
Now ONLY the rows that have your selected date (17-Feb-21) in the "request delivered date" column will be displayed.

CLEARING FILTERS

When you have FILTERS active, only rows with matching information are displayed.
The other rows are hidden. In order to show **all** rows, you need to clear any FILTERS that you have active.

First look for the active FILTER icon at the top of each column
(you may need to scroll left or right to see the buttons on top of all the columns)
In this example we can see that there are active FILTERS on the "5 day delivered date" column and the "request delivered date" (but again, don't forget to scroll left and right to check **all** columns)

Now, in each of these columns, open the menu and select "Clear Filter From…"

Once you do this for all the columns, every row should be showing.
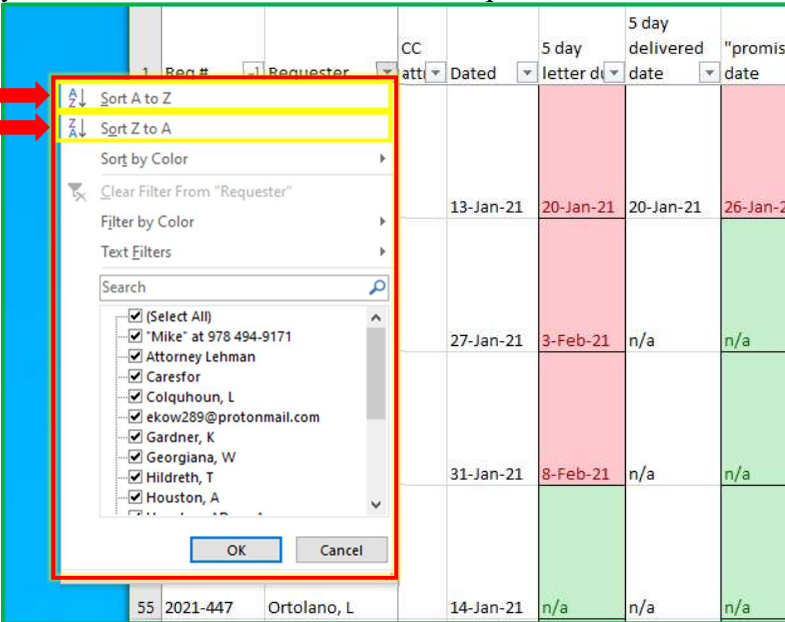
SORTING and FILTERING WORDS and NAMES

Filters can be used to find more than just dates. Using the same principles above we can sort and filter by text instead of dates.

SORTING by WORDS or NAMES
Say for example we want to sort the rows by name of the requester in alphabetical order.

Open the sort/filter menu for the "Requester" column and select "Sort A to Z" or "Sort Z to A" you want the rows sorted in reverse alphabetical order.

FILTERING by WORDS or NAMES

Now say you want to display only rows that have a specific word or name in a particular column. There are two ways to do this: (1) by selecting the word or name from the list, or (2) by searching for the word or name

Selecting the word or name

(1) Open the sort/filter menu for the column and click "(Select All)" to clear the checkboxes.
(2) Select the name or word from the list that you want to display
(3) Click OK
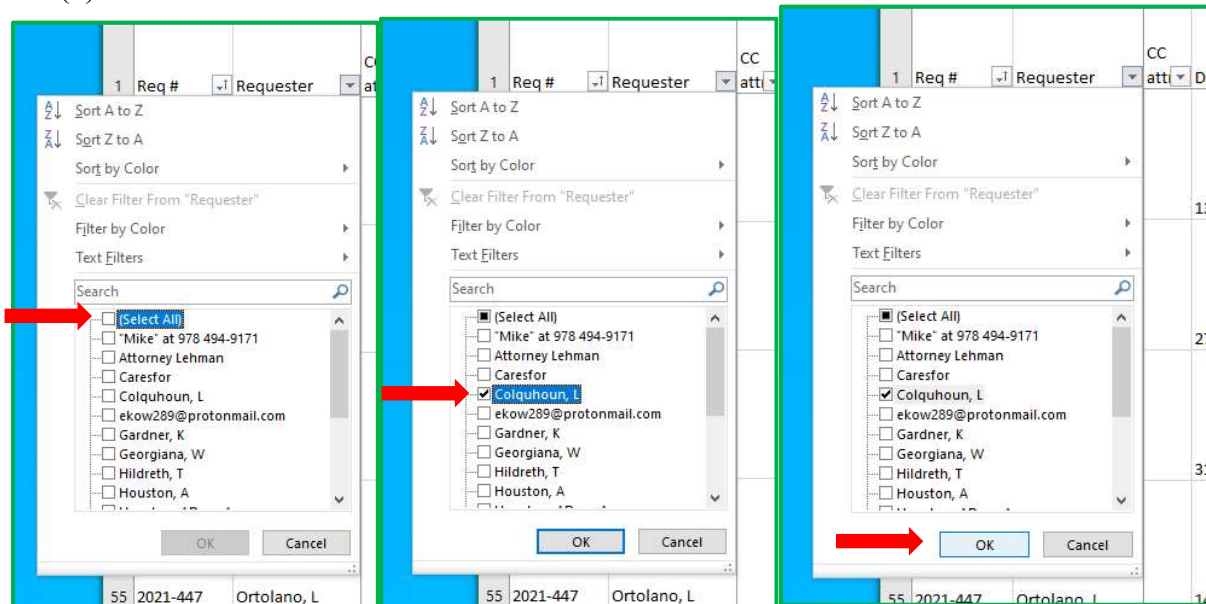
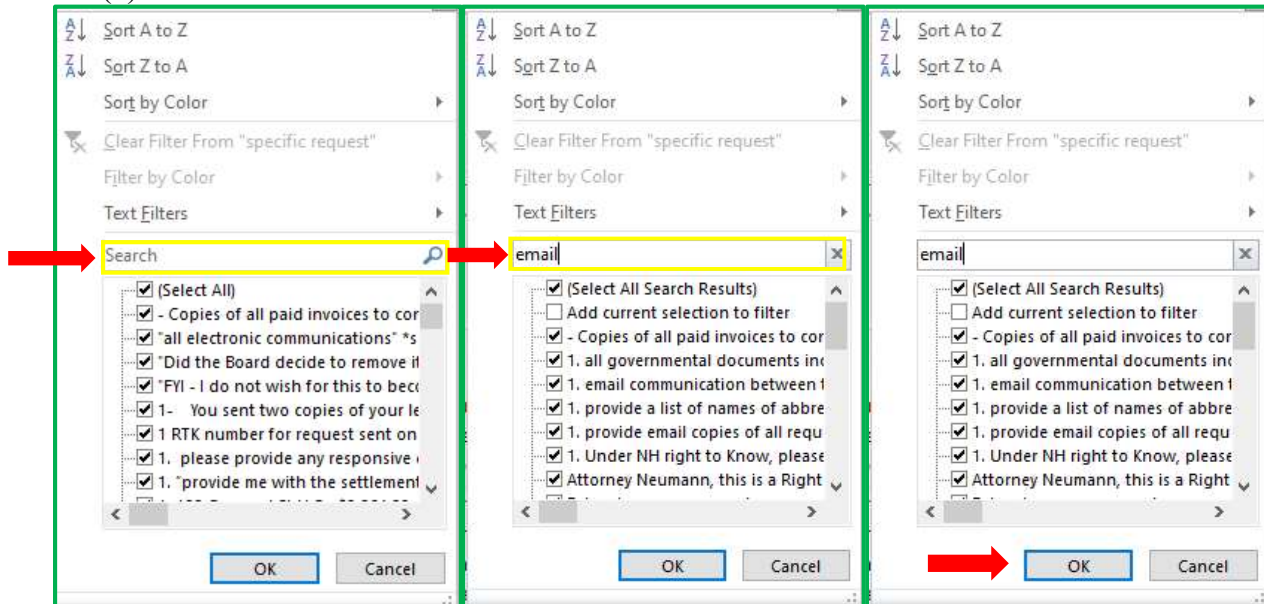Now the table will display only rows with the selected name or word in that column.

ALWAYS REMEMBER you need clear FILTERS to display **all** rows again.

Searching for a word or name

Now say you want to search for all requests that have a specific word in it, for example "email"

(1) Open the sort/filter menu for the column (in this case the "specific request" column) and click inside the text box labelled "search."
(2) Type in the word of name you want search for (in this case "email")
(3) Click OK

Now the table will display only rows that have that word or name in the column where you searched. (in this example: the word "email" in the "specific request" column)


<u>ALWAYS REMEMBER</u> you need clear FILTERS to display **all** rows again.

ADDING NEW RTK REQUESTS TO THE TRACKER

(1) **Sort A to Z in the "Req #" column** to ensure you are assigning the next number in the sequence. (See SORTING above).

(2) **In the "Dated" column fill in the date the requester sent the request** (NOT the date received). Dates should auto format as long as the date it recognizable.

(3) **Fill in the "5 day letter due" column** with a date 5 business days after the request was received. If the request was sent after business hours, it does not count as received until the morning of the next business day.

(4) **Fill in "Dept. requested from" column** if the request was originally addressed to someone outside of legal (This is not critical, but it is good info to have).

(5) **Copy and paste the body of the FULL REQUEST into the "specific request" column.** Having the full request in this box makes it easier to search all requests we have received for specific words or phrases. (e.g.: "emails," "Kleiner," "abatements," etc.) However, keep in mind the following:

    a. If the requester is using a form letter, don't copy the parts at the beginning or end that just restate the law or are used in dozens of other requests.
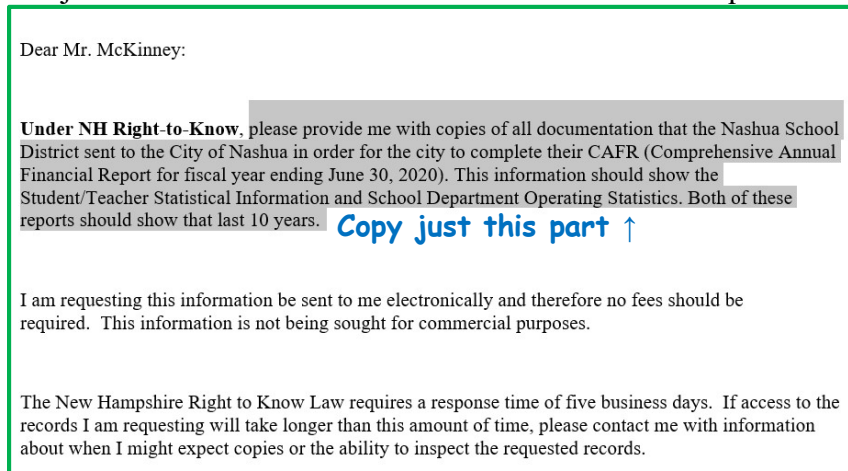
    b. Make sure you double click in the cell (and a cursor is visible) before you paste the text in. If you don't do this, it may paste the text into multiple cells if there are line breaks in the copied text.
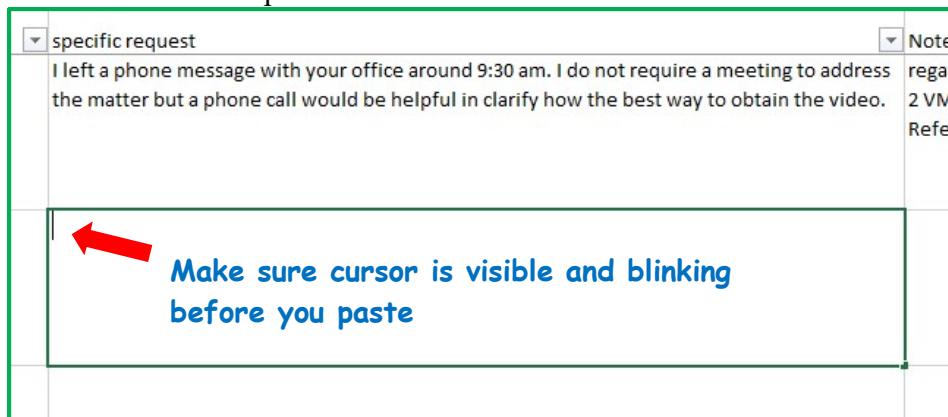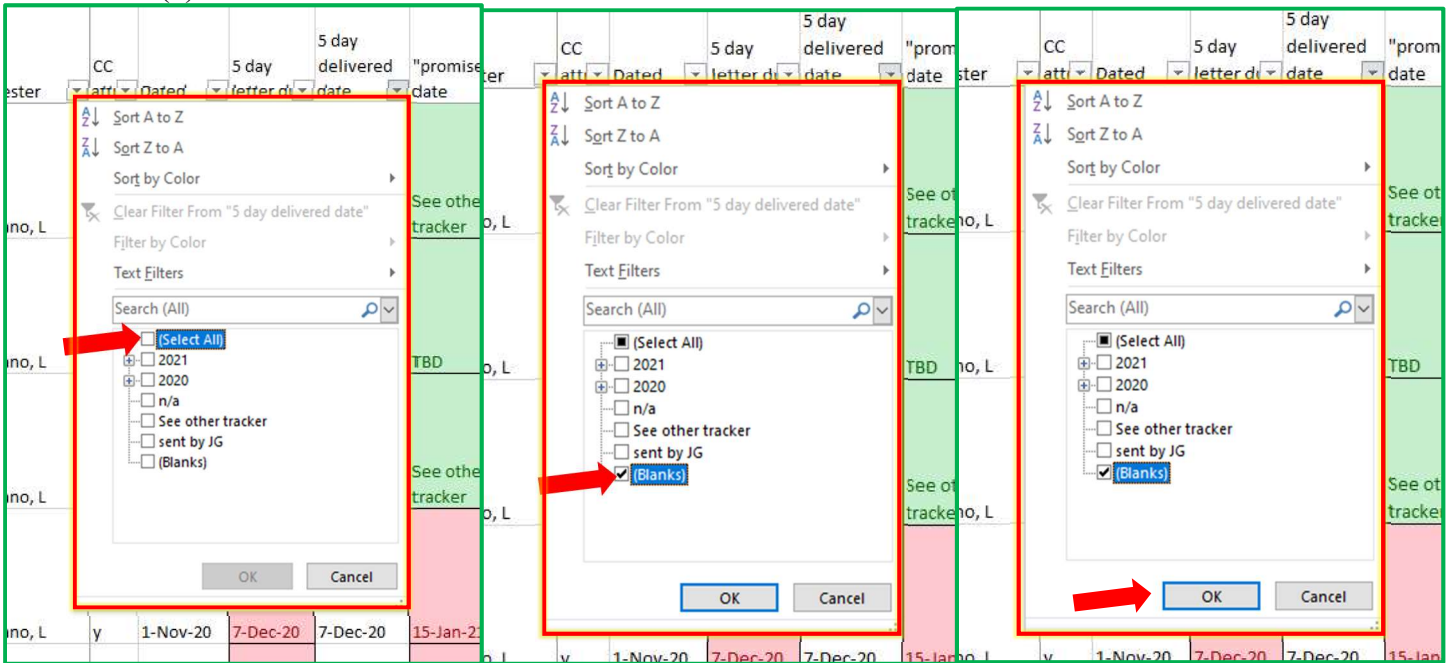

(6) All other fields are fairly self-explanatory.

FILTERING FOR PENDING REQUESTS

Regardless of whether you are looking for requests that have not yet received a 5-day or a Final response, the process is the same:

(1) Open the menu for either "5 day delivered date" or "request delivered date" depending on which one you are looking for, and uncheck "(Select All)"
(2) Check "(Blanks)"
(3) Click OK

Now the table will display only requests that have no entry for whichever "delivered date" column you chose.

INFO AT A GLANCE

Color coding
You probably have noticed the different colors in the "5 day letter due" column and the "'promise' date column. This are auto-formatted based upon what dates are in each column.
RED   the date has passed.
YELLOW   the date is within the next 7 calendar days.
GREEN   the date is further than 7 calendar days out.

Say for example you want to display only requests with a 5 day letter due today or within the next 7 days all you have to do is filter by the appropriate color

Changing the date format

I have the document set to format the date into the DD-Month-YY format. This means that as long as you input the date in a recognizable format (e.g.: MM/DD/YY, MM/DD/YYYY, Month DD, YYYY, etc.) it should always re-format to DD-Month-YY.

However, if you would rather it display in a different format, that is a quick fix:

1. Select the whole column by clicking above the cells in the box with the letter heading (A, B, C, Etc.). Make sure the cursor turns into a downward arrow before clicking. If you properly select the whole column, the heading should turn green and the cells should be highlighted gray like in the picture below.

2. Next, right click on any of the selected cells and scroll down to "Format Cell…"
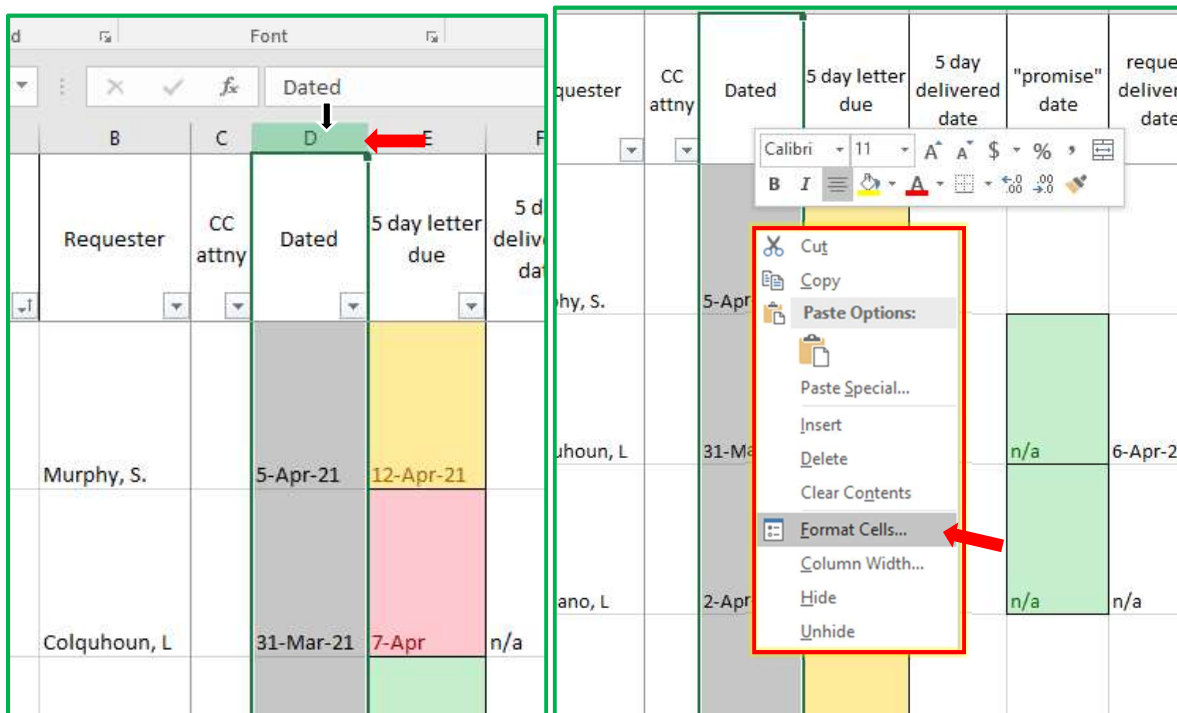
3. In the menu you that pops up
    a. Make sure you are in the "Number" tab
    b. Select "Date" from the column on the left
    c. Select the formatting type you want from the right column
            (NOTE: stay away from the formats with an asterisk – they end up changing info based upon the computer's selected time-zone)
    d. Click "OK" and your dates should be changed to your selected format