

Contract Crosswalk Workbook

Instruction Manual



King County

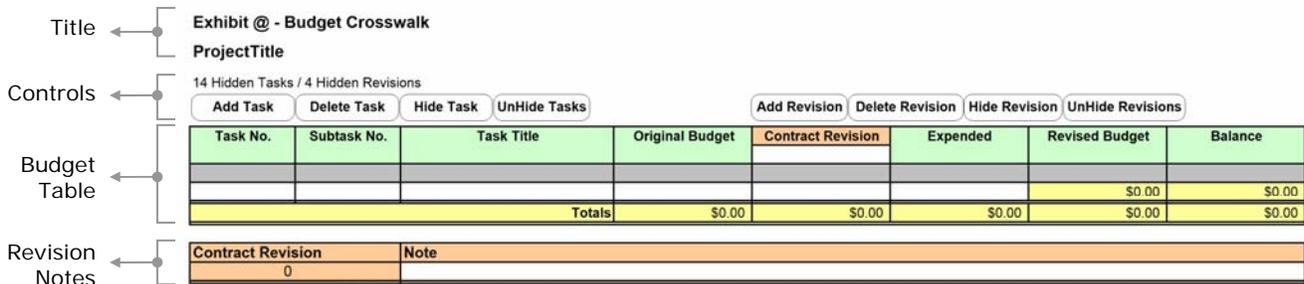
DES/FBOD/PCS

Project Control Office

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Contract Crosswalk Workbook Structure and Use



Title This area contains two cells for entering title text for your Contract Crosswalk.

Controls This area contains the controls you will use to manage your Contract Crosswalk worksheet. It also displays the number of Tasks or Contract Revisions that are currently hidden on the worksheet.

Budget Table This is the main data area for your Contract Crosswalk. You can enter data in any cells in this area that have a white background.

Budget Table Columns

Task No. Enter major task numbers in this column. If no Subtask No. is entered for a Task Row (for instance, when entering a rolled-up task), the Task No. will automatically format as bold text. When a Subtask No. is entered, Task No. will format as regular text weight.

Subtask No. Enter minor, or subtask, numbers in this column.
Note You can enter project budget data at either the task summary level, the subtask detail level, or a combination of the two. For instance, you could enter task 100 as a single row, rolled-up task, but enter the remainder of the tasks with a row for every subtask.

Task Title Enter the name or short description of the task in this column.

Original Budget Enter the total original budget for a task/subtask in this column. When breaking down a task by subtasks do not create a "task total" row in addition to the subtask rows you create – this will double the value of that task's budget in the worksheet.

Contract Revision Show budget changes to a task/subtask by entering amendment or fund transfer data in a Contract Revision column. The subheader white cell below the "Contract Revision" header can be used to enter a name, date, or other identifier for the Contract Revision (for example, "Amendment 1"). Whatever you enter in this subheader cell will become the label for the Contract Revision in the Revision Notes table.

Expended Enter total expenditure for a task/subtask in this column.

Revised Budget This column automatically calculates the current budget amount by summing the values of the Original Budget and any Contract Revisions.

Balance This column automatically calculates the current balance of the budget by subtracting the value Expended from Revised Budget.

Revision Notes This area is for additional, short notes regarding your Contract Revisions. Each Note is limited to 85 characters.

How To Add Tasks and Contract Revisions

Important When you insert Task rows, or Contract Revision columns, you can add up to 100 Task rows at a time, and up to 10 Contract Revision columns at a time. (Please keep in mind the maximum size of an Excel worksheet is 65,536 rows by 256 columns).

Insert Tasks on a worksheet

1. To insert Task rows, do one of the following:
 - o To insert a single row, select the row or a cell in the row above which you want to insert the new row. For example, to insert a new row above Task row 5, click a cell in Task row 5.
 - o To insert multiple rows, select the rows above which you want to insert rows. Select the same number of rows as you want to insert. For example, to insert three new rows, you need to select three rows.
2. Click the button labeled **Add Task**.

Insert Contract Revisions on a worksheet

1. To insert Contract Revision columns, do one of the following:
 - o To insert a single column, select the column or a cell in the column immediately to the right of where you want to insert the new column. For example, to insert a new column to the left of the second Contract Revision column, click a cell in the second Contract Revision column.
 - o To insert multiple columns, select the columns immediately to the right of where you want to insert columns. Select the same number of columns as you want to insert. For example, to insert three new columns, you need to select three columns.
2. Click the button labeled **Add Revision**.

How To Delete Tasks and Contract Revisions

Delete Tasks on a worksheet

1. To delete Task rows, select the rows you want to delete.
2. Click the button labeled **Delete Task**.

Delete Contract Revisions on a worksheet

1. To delete Contract Revision columns, select the columns you want to delete.
2. Click the button labeled **Delete Revision**.

How To Hide or Unhide Tasks and Contract Revisions

Unhide a Task or Contract Revision

Click the button labeled **Unhide Tasks** to display all hidden Tasks, or click the button labeled **Unhide Revisions** to display all hidden Contract Revisions.

Hide a row or column

1. Select the Tasks or Contract Revisions you want to hide.
2. Click the button labeled **Hide Tasks** to hide your selected Tasks, or click the button labeled **Hide Revisions** to hide your selected Contract Revisions.

How To Filter a Contract Crosswalk Worksheet

Contract Crosswalk Worksheets can be filtered by the following columns:

- Task No.
- Subtask No.
- Task Title
- Original Budget
- Contract Revision
- Expended

Columns that can be filtered have an in-cell arrow  in the gray row below the column headings. Access the filtering options by clicking on these arrows and then choosing filter options from the drop-down menu.

Notes

- The filter option list includes options for sorting columns. Please be aware that **sorting is not available** in Contract Crosswalk Worksheets. If you attempt to select one of the sorting options, Microsoft Excel will inform you that it can not sort the column. These options appear as a Microsoft Excel default and can not be removed from the drop-down list.
- When you apply a filter to a column, the only filters available for other columns are the values visible in the currently filtered range.
- Only the first 1000 unique entries in a list appear when you click the arrow .

Filter for the smallest or largest number

1. Click the arrow  in the column that contains the numbers, and click **(Top 10...)**.
2. In the box on the left, click **Top**, or **Bottom**.
3. In the box in the middle, enter a number.
4. In the box on the right, click **Items**.

Filter a range for rows that contain specific text

1. Click the arrow  in the column that contains the numbers, and click **(Custom)**.
2. In the box on the left, click **equals**, or **does not equal**, **contains**, or **does not contain**.
3. In the box on the right, enter the text you want.
4. If you need to find text values that share some characters but not others, use a wildcard character.

How?

The following wildcard characters can be used as comparison criteria for filters, and when searching and replacing content.

Use	To find
? (question mark)	Any single character For example, sm?th finds "smith" and "smyth"
* (asterisk)	Any number of characters For example, *east finds "Northeast" and "Southeast"
~ (tilde) followed by ?, *, or ~	A question mark, asterisk, or tilde For example, fy91~? finds "fy91?"

5. To add another criteria, click **And** or **Or**, and repeat the previous step.

Filter for blank or nonblank cells

Click the arrow  in the column that contains the numbers, then click **(Blanks)** or **(NonBlanks)**.

Note The **Blanks** and **NonBlanks** options are available only if the column you want to filter contains a blank cell.

Filter for numbers greater than or less than another number

1. Click the arrow  in the column that contains the numbers, and click **(Custom)**.
2. In the box on the left, click **is greater than**, **is less than**, **is greater than or equal to**, or **is less than or equal to**.
3. In the box on the right, enter a number.
4. To add another criteria, click **And** or **Or**, and repeat the previous step.

Filter for a number equal to or not equal to another number

1. Click the arrow  in the column that contains the numbers, and click **(Custom)**.
2. In the box on the left, click **equals**, or **does not equal**.
3. In the box on the right, enter a number.
4. To add another criteria, click **And** or **Or**, and repeat the previous step.

Filter for the beginning or end of a text string

1. Click the arrow ▼ in the column that contains the numbers, and click **(Custom)**.
2. In the box on the left, click **begins with**, or **does not begin with**, or **ends with**, or **does not end with**.
3. In the box on the right, enter the text you want.
4. If you need to find text values that share some characters but not others, use a wildcard character.

How?

The following wildcard characters can be used as comparison criteria for filters, and when searching and replacing content.

Use	To find
? (question mark)	Any single character For example, sm?th finds "smith" and "smyth"
* (asterisk)	Any number of characters For example, *east finds "Northeast" and "Southeast"
~ (tilde) followed by ?, *, or ~	A question mark, asterisk, or tilde For example, fy91~? finds "fy91?"

5. To add another criteria, click **And** or **Or**, and repeat the previous step.

Filter for the top or bottom numbers by percent

1. Click the arrow ▼ in the column that contains the numbers, and click **(Top 10...)**.
2. In the box on the left, click **Top** or **Bottom**.
3. In the box in the middle, enter a number.
4. In the box on the right, click **Percent**.

How To Create Multiple Crosswalk Worksheets

1. Select the worksheet you want to copy.
2. On the **Edit** menu, click **Move or Copy Sheet**.
3. In the **To book** box, make sure your current Contract Crosswalk Workbook is selected to receive the sheets.
Note Do not move or copy a Contract Crosswalk worksheet to either another workbook or a new workbook. Copying sheets to other workbooks, even another Contract Crosswalk Workbook, will have unpredictable results.
4. In the Before sheet box, click the sheet before which you want to insert the moved or copied sheets.
5. To copy the sheets instead of moving them, select the Create a copy check box.

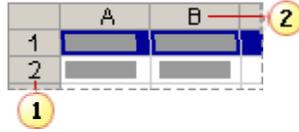
How To Select Rows and Columns

To select

Do this

Click the row or column heading.

An entire row or column



1 Row heading

2 Column heading

Multiple rows or columns

Drag across the row or column headings. Or select the first row or column; then hold down SHIFT while you select the last row or column.

Note To cancel a selection of rows or columns, click any cell on the worksheet.