How to Clean “Raw” Comp Reports

1. Put your cursor in the row of the headings. In the spreadsheet above, it is row 2. Go to the Data Tab in Excel and select the Filter.

2. You should now see the filters turned on for each column.

3. Go to the “Action” column, or column H, and select the “X”s. You do this by clicking on the “Action” column, deselecting the “Select All” option and then selecting the “X” in the list.

   Note: there are (3) different “Action” codes. “E” stands for “EARNED”. “T” stands for “TAKEN”. “X” stands for “LAPSED”. By selecting the “X”s, you are selecting all of the “LAPSES” in the list for view.

4. In the first visible “Quantity” field, enter the formula to find the correct value of the lapse.
   a. **NOTE:** The original values in the quantity fields in Comp 1.0 are actually the “Anniversary” date from when the time was earned-to-date.
   b. For example, if the numbers that show in the “Quantity” column below were earned on these dates: 9/2/2005, 9/9/2005, and 9/10/2005.
Now it’s time to enter the FORMULA.

5. In the Quantity values, you want to enter the formula of the Ending Balance of the preview row minus the value of the current row. It will look something like this: “=I3-I4” and press “Enter”.

See below:

![Image of Excel spreadsheet showing the formula in action](image)

Note: Even though you do not see ALL of the rows, specifically with the first one, the MS Excel program will still be able to identify the referenced cell.

Another Way to Look At it:
“End Bal” Column (or I Column) and previous row (-) MINUS “End Bal” Column (or I Column) and current row (-)

6. Copy this formula to each cell below holding the “Ctrl” button to select each quantity following.
7. Then, with your mouse in the highlight, selected area, right click and paste the formula in the quantities.

8. Continue this action for the rest of the list.
9. Select all of the zero (0) values in the quantity field. Notice the funnel filter icon that now shows for the drop down in the pic below.

![Image of Excel spreadsheet showing the filter icon](image)

10. Now, delete all the rows that are visible. This will allow you to remove all “False Lapses” leaving only the true lapses for view in the comp report.
11. Once those are removed, you can turn off the filters for the “Quantity” and “Action” fields, which will give you a clean comp report.