Summit – Tips and Usability

Here are some basic issues of functionality that will make Summit easier.

**Expand:** Each category will automatically only show the 25 most recent entries. Use the arrow tool at the bottom of the category to expand to show all of the transactions for the time period.

**Export:** You can export a given category to Excel if you want to manipulate the data, or get rid of some of the superfluous categories.
**Sort:** You can sort an entire category by a field heading. When you hover your mouse over the heading two arrows will appear. The ‘up’ arrow sorts from smallest to largest, and the ‘down’ arrow sorts from largest to smallest.

![Image of sorted transactions](image)

**Other Useful Information:**

- The **Journal Date** heading refers to the date that the transaction **entered Summit** not the date that it occurred. Sometimes transactions take days or months to process, so sorting by Journal Date will not show chronological events.
- For a full description of what each of the headings in each category means, please consult the **Glossary**.