

Guide to Importing Data in Microsoft Excel®

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OVERVIEW

If you choose to manipulate data using Microsoft Office Excel it is important that you import the file into Microsoft Excel® using the Data Import Wizard. If you do not follow the procedure explained in this document, Excel may alter your data. This document applies to the following versions of Excel:

- Excel 2010
- Excel 2013
- Excel 2016
- Excel 2019

Where there are differences between versions in the instructions and/or screen shots, the specific version(s) that apply are noted. If the version of Excel is not noted, then the instructions and/or screen shots apply to all versions.

If you open a text formatted file in Microsoft Office Excel, Excel makes assumptions regarding the contents of a file, and manipulates the data according to those assumptions. For example, leading zeros are deleted and date formats may change. Furthermore, Excel does not alert or notify the user regarding the changes which have been made to the data.

Therefore, in order to preserve the integrity of the data, it is critical to <u>import</u> the file into Excel. This is best accomplished using the Data Import Wizard, which preserves the text formatting of your file. By using this wizard, external data can be imported and the original formatting is unchanged. Follow the steps in this document if you want to use Excel to manipulate your data.

IMPORTING DATA INTO EXCEL AS TEXT

For Excel 2019 - Select Data \rightarrow Get Data \rightarrow From File \rightarrow From Text/CSV



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For Excel 2013 and Excel 2016 - Select Data \rightarrow Get External Data \rightarrow From Text

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For Excel 2010 - Select Data \rightarrow From Text

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A	Import data from a text file.		E	F	G	Н	1	J
1	Press F1 for more help.							
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The *Import Text File* pop up window displays. Locate and select the file to import and click **IMPORT.**

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File name:	Student	▼ Text Files Tools ▼ Import ▼ Ca	▼ Incel

Note: You may have to navigate to the directory that holds your data. Consult Excel documentation for additional information on navigation.

Import Wizard with Excel 2019

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In Excel 2019 the Imported File Window displays. Click the **DELIMITER** drop down to select the files delimiter type. Then click the **DATA TYPE DETECTION** drop down. You can choose to use the auto detected data types for each column based on the first 200 records in the text file or the entire file. Once you have selected the detected type click **LOAD** to complete the import process.

le Origin			Del	imiter			Data	a Type Detectio	n			
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17012956	563	1214350	Yes	No	Maybe	5/10/2	2019	9 Yes				
17015452	498	45	Yes	No	Maybe	5/17/2	2019	9 Yes				
17017948	433	75000	Yes	No	Maybe	5/24/2	2019	9 Yes				
17020444	368	346	Yes	No	Maybe	5/31/2	2019	9 Yes				

If you want to manually define the column data types select **Do not DETECT DATA TYPES** from the drop down then click **EDIT.**

The Query Editor Window will open.

File	Ho	me Transform A	dd Column	View											
ose &	Ref Prev	Properties	Choose	Remove Columns •	Remove	A↓ A↓	Split Group Column - By	Data Type: Whol	v as Headers 🔻	Combine	Manage Parameters •	Data :	source ings	Recent Source ▼	
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To set each column data type click on the column header then click on the Data Type drop down and select the column data type. Once this has been done click on Close & Load.

Home		ld Column	View								
) Refres		Choose I Columns • C		Remove Rows	Split Group Column + By	Data Type: Decimal Number - Decimal Number Currency	Combine	Manage Parameters •	Data sou setting		
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5	17010460	628	567		No	Duration	5/3/20				
6	17012956	563	1214350		No	Text	5/10/20		AIII	Properties	
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Once this has been done for each column click on Close & Load.

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4	17005468		7	58	250	Yes		No		Maybe		4/19/2019	Yes		
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6	17010460)	6	28	567	Yes		No		Maybe		5/3/2019	Yes		
7	17012956	;	5	63	1214350	Yes		No		Maybe		5/10/2019	Yes		
8	17015452	2	4	98	45	Yes		No		Maybe		5/17/2019	Yes		
9	17017948		4	33	75000	Yes		No		Maybe		5/24/2019	Yes		
10	17020444	L .	3	68	346	Yes		No		Maybe		5/31/2019	Yes		

To Import for all other versions of Excel follow instructions below.

The *Text Import Wizard* pop up window displays.

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<u>esc</u>	.10	lar

Text Import Wizard - Step 1 of 3
The Text Wizard has determined that your data is Delimited. If this is correct, choose Next, or choose the data type that best describes your data. Original data type
Choose the file type that best describes your data: Choracters such as commas or tabs separate each field. Fixed width - Fields are aligned in columns with spaces between each field.
Start import at row: 1 File grigin: 437 : OEM United States
Preview of file C:\Users\kjones\Desktop\Test\Student.csv.
1 District_code, Location_code, School_year_date, Student_ID, Social_Security_1 2 11,4,2011-06-30,1,,7,,5,
Cancel < Badk Next > Finish

TIP: Use this screen to define the file characteristics (delimited or fixed width). In the example above, the data type is **Delimited**.

Note: As demonstrated in the Preview section above, the data type is defined as a Delimited file.

Click **NEXT**. The second pop up window of the *Text Import Wizard* displays.

Text Import Wizard -	Step 2 of 3				? <mark>x</mark>
This screen lets you se below.	et the delimiters you	r data contains. You can	see how your te	ext is affected in t	he preview
Delimiters	Treat consecu Text gualifier:	itive delimiters as one			
Data <u>p</u> review					
District_code 11 11 11 11 11	Location_code 4 4 4 4	School_year_date 2011-06-30 2011-06-30 2011-06-30 2011-06-30 2011-06-30	Student_ID 1 2 3 4	Social_Secu	tity_nur
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Note: This is an illustration of the second step of the wizard for a Delimited file type. This particular file is defined as a **COMMA DELIMITED** file. To change the selected **DELIMITER,** click the value of **DELIMITER** used to separate the fields in your file.

Text Import Wizard - Step 2 of 3			? ×
This screen lets you set field widths (column break	ය).		
Lines with arrows signify a column break.			
To CREATE a break line, click at the desired p To DELETE a break line, double click on the lin To MOVE a break line, click and drag it.			
Data preview			
10 20 30		50 	
District Code, Location Id, School Y US099999,001,2003-06-30,100555,"", US099999,082,2003-06-30,100559,"", US099999,001,2003-06-30,100561,"", US099999,001,2003-06-30,100567,"",	."",Hannouch ."",Zhu,Iqra ."",Jones,Ju	e,Sandy,"",09 h,"",10,10,10 Aith,"",11,11	,09,9th th,"",1 ,11th," ,11,11, •
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NOTE: This is an illustration of the second step of the *Data Import Wizard* when you are importing a **FIXED WIDTH** data file. The lines with arrows in the **Data Preview** indicate a column break.

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? X Text Import Wizard - Step 3 of 3 This screen lets you select each column and set the Data Format. Column data format General 'General' converts numeric values to numbers, date values to dates, and all O Text remaining values to text. ◎ <u>D</u>ate: MDY • Advanced... O not import column (skip) Data preview General General General General School_year_date Student ID Social Security nu District code ocation code 2011-06-30 2011-06-30 2011-06-30 2011-06-30 Cancel Next > < <u>B</u>ack Einish

Click **NEXT**. The third pop up window of the *Text Import Wizard* displays.

NOTE: This is an illustration of the third step of the *Data Import Wizard*. Regardless of the **Data Type** of your file, it is <u>critical</u> to select **TEXT** as the **COLUMN DATA FORMAT.** This preserves the formatting of numeric values in your file.

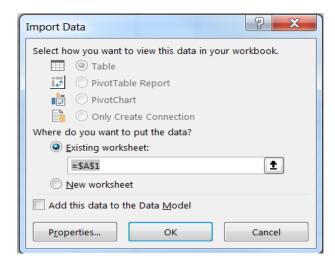
TIP: Click the first column of data in DATA PREVIEW to select all data fields. Press and hold the SHIFT key. Click the last column. All rows in DATA PREVIEW are selected.



Column data forma © <u>G</u> eneral © Text	'G	eperal' converts numeri			
◎ <u>D</u> ate: MDY	•	emaining values to text.	c values to numbe	rs, date values to dates, and	t all
O Do not import	olumn (skip)				
)ata preview					
_	Text	Text	Text	Text]
Text District_cod	e Location_co	de School_year_d		Text D Social_Security_nu	- -
Text District_cod	e Location_co 4	de School_year_da 2011-06-30			
Text District_cod 11 11	Location_co 4 4	de School_year_d	ate Student_] 1 2		
Data greview Text District_cod 11 11 11	e Location_co 4	de School_year_d: 2011-06-30 2011-06-30			

Click **FINISH**. The *Import Data* pop up window displays.

(Import Data pop up window in Excel 2013 and Excel 2016)



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(Import Data pop up window in Excel 2010)

Import Data
Where do you want to put the data?
=\$A\$1
New worksheet
Properties OK Cancel

Select **EXISTING WORKSHEET** to return the data to the spreadsheet in which you started. Click **OK**. An Excel spreadsheet displays with the imported data.

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1	District_code	Location_code	School_year_c	date	Student_ID	Social_	Security	_number	FamilyNu	mber	Last_Nan
2	11	4	2011-06-30		1						
3	11	4	2011-06-30		2						
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6	11	4	2011-06-30		5						
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9	11	4	2011-06-30		8						
10	11	4	2011-06-30		9						
11	11	4	2011-06-30		10						
12	11	4	2011-06-30		11						
13	11	4	2011-06-30		12						
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Select **FILE > SAVE As.** The **Save As** dialog box displays.

Select **CSV (COMMA DELIMITED)** from the **SAVE AS TYPE** drop down box. Enter an appropriate file name in the **File Name** field and navigate to the directory into which you wish to save the file. Click **SAVE** to save the file in comma-delimited format.

Note: This step is critical if you have manipulated the contents of the file in Microsoft Office Excel. This ensures the changes you made to the data are saved to the imported file.