



dataWizard

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User manual

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# Getting started

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## Section 1

# Getting started about this document

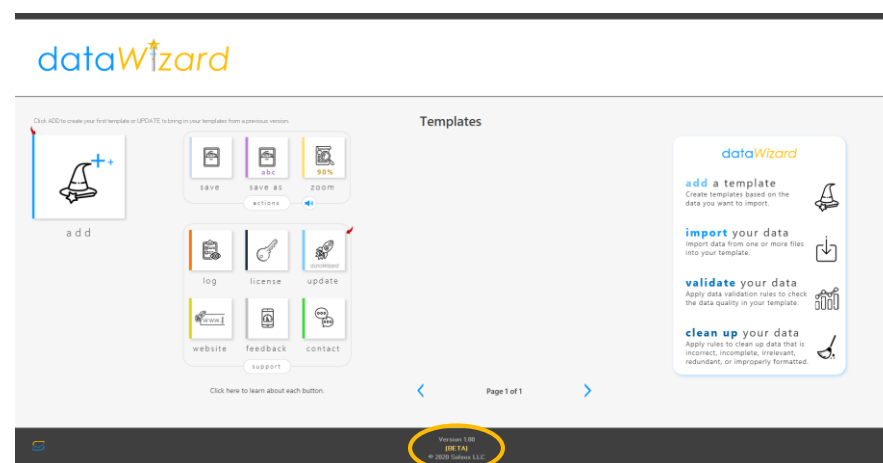
## Purpose of this user manual

This user manual contains key information on how to use dataWizard. It includes a description of the solution, its functionality and capabilities, and step-by-step instructions to access and use the solution.

## Applicability of this user manual

This user manual is applicable to dataWizard v1.00. For inquiries related to dataWizard or this document, please contact us at [support@soleox.com](mailto:support@soleox.com).

**Tip:** Verify that this user manual is applicable to the version of dataWizard you are using.



# Getting started about dataWizard

## What is dataWizard and what is it for?

dataWizard is a data manipulation solution that enables users to easily perform complex data import, validation and cleanup tasks in very little time and with no coding.

**Tip:** dataWizard is built in Microsoft Excel and is compatible with all CSV and Microsoft Excel files.

## Who can use dataWizard?

dataWizard can be used by anyone who has access to Microsoft Excel (see System Requirements below for more info). dataWizard does not require any programming background.

## Who should use dataWizard?

dataWizard's main target are users who have the need to compile, analyze and clean up large amounts of data from many workbooks or CSV files that are similarly formatted.

## System requirements

Microsoft Windows with Microsoft Excel 2010 or newer versions\*.

\* dataWizard will not work on Excel for the web.

# Introducing dataWizard

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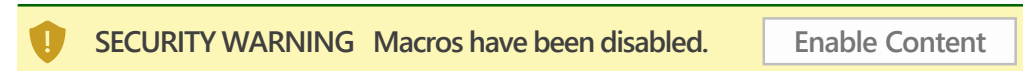
## Section 2

# Introducing dataWizard opening dataWizard

## Opening dataWizard

Download the latest version of data Wizard from <https://soleox.com/datawizard> and open it as you would open any other Microsoft Excel workbook.

Upon opening, you might get the following SECURITY WARNING. Make sure you click on Enable Content.



Because dataWizard relies heavily on VBA source code, macros must be enabled. If dataWizard seems dead, close it, open a blank Excel document and verify your Macro Settings are not set to disable all macros without notification. For more information on how to enable macros in Excel, refer to the following article:

<https://support.office.com/en-us/article/enable-or-disable-macros-in-office-files-12b036fd-d140-4e74-b45e-16fed1a7e5c6>

## Private Excel instance

If any other Excel workbooks are open prior to opening dataWizard, dataWizard will create a new instance of Excel and it will re-open itself in the new instance. You do not need to do anything. Just wait a few seconds and the Home page will come up as soon as dataWizard is ready for use.

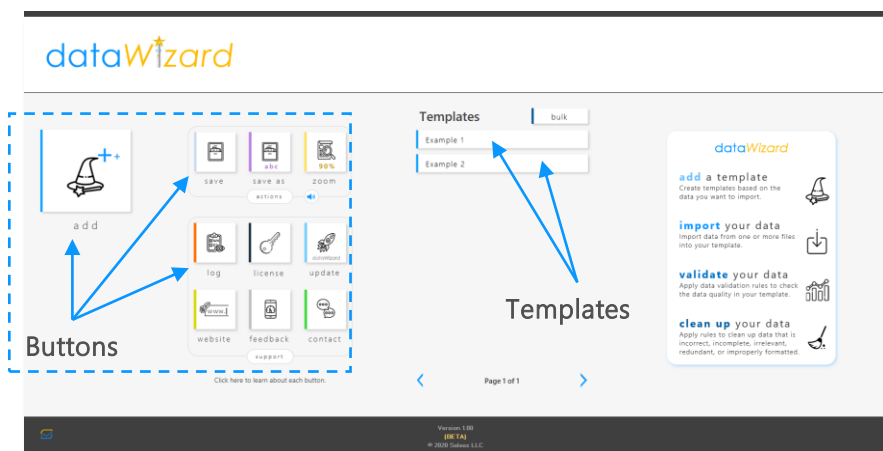
Similarly, if any workbook attempts to open itself within the instance of Excel in use by dataWizard, dataWizard will close the workbook and it will re-open it in a different instance of Excel.

# Introducing dataWizard key components

## Key components

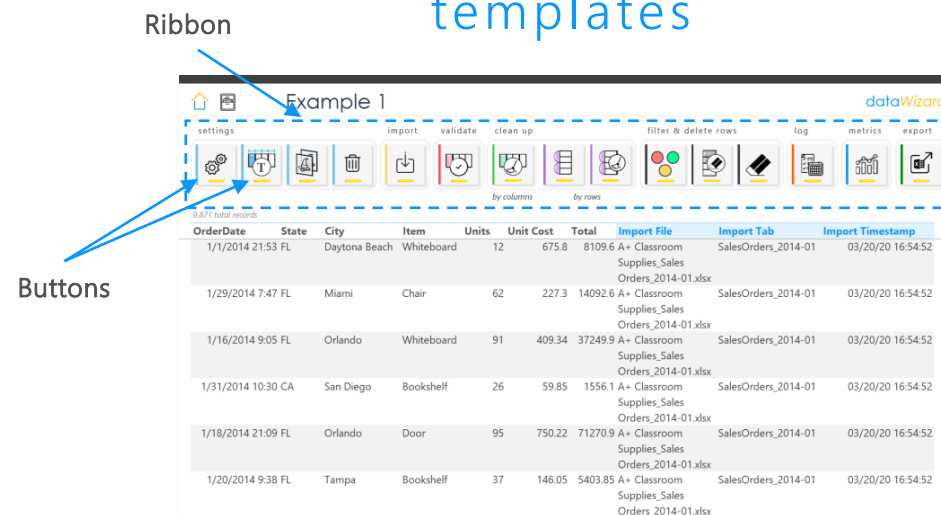
dataWizard has three (3) main components:

home



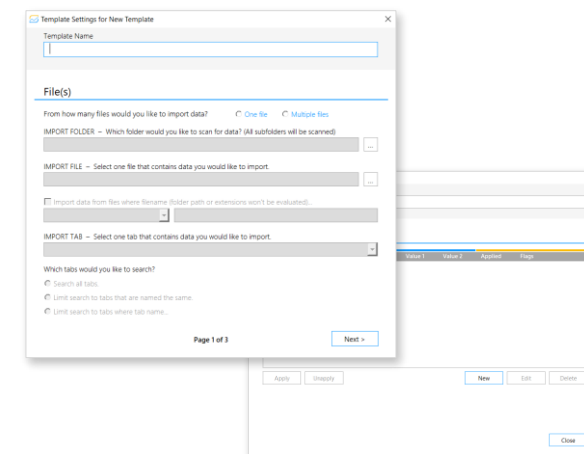
From the Home tab, you can add new templates, access existing ones, save your work, change zoom settings and much more.

Ribbon templates



You will create and use templates to import, validate and clean up data and access metrics on the quality of the data

userforms

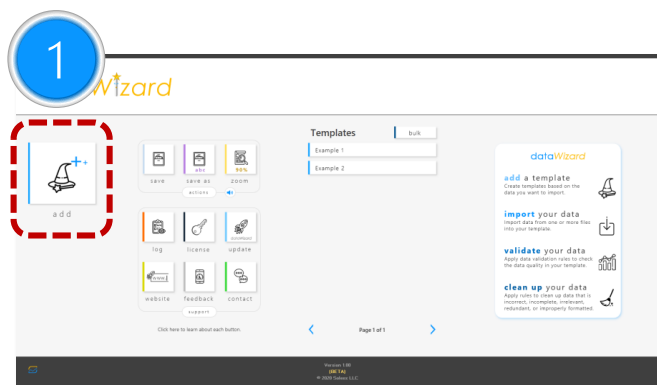


Userforms will enable you to manipulate your templates and the data in them

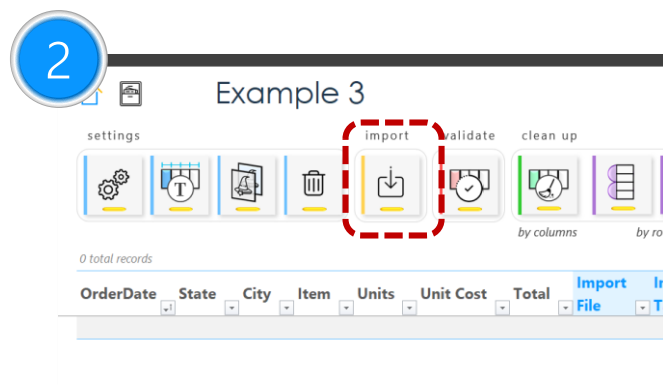


# Introducing dataWizard quick start

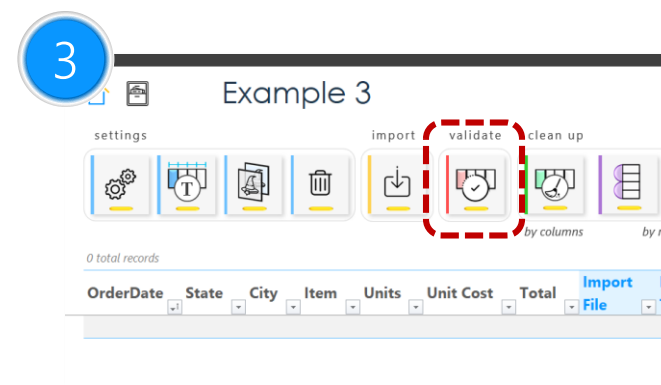
## 4 easy steps



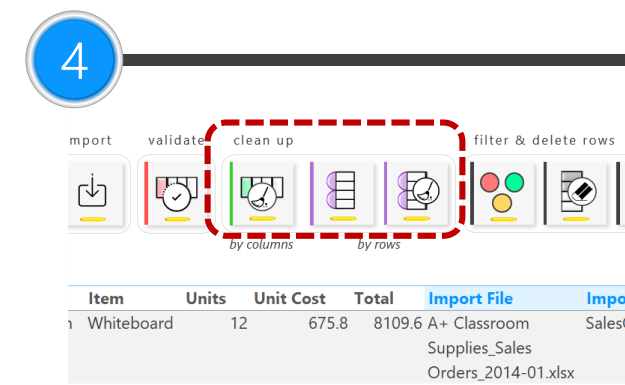
Create a new template



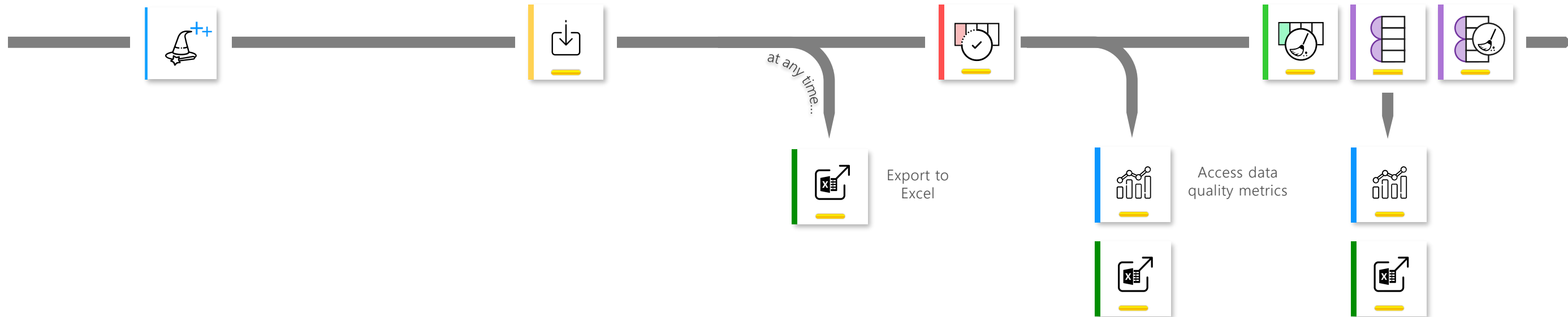
Import data



Validate data



Clean up data



# Introducing dataWizard buttons

## home

### actions



**add** – Create a new template.

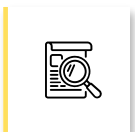
[More information on page 15](#)



**save** – Save the file that you are working on.



**save as** – Save the file that you are working on with a different name.

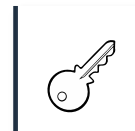


**zoom** – Update default zoom for all templates, Activity Log and Data Quality Metrics.

### support



**log** – Access Activity Log, which provides an audit trail of relevant actions performed on each template and their data. It provides assurance on the integrity of the data for audit purposes.



**license** – If you are planning on working offline or under a tight VPN connection for a while, you will need a license key to use dataWizard.



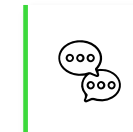
**update** – When a new version of dataWizard is released, open up the new version and use this button to bring in all your templates from your previous version of dataWizard to the latest.



**website** – Access the official dataWizard website where you can find relevant documentation, new releases, etc.



**feedback** – Take this short survey that will help us make dataWizard better for you and the rest of our user community.



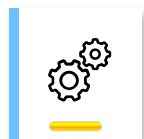
**contact** – Contact us with any questions, comments, suggestions or requests.

# UPDATE

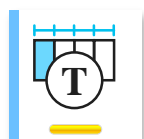
## Introducing dataWizard buttons

### template

#### settings



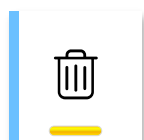
Access/edit template settings.



Access template column settings (column width and data format).



Duplicate this template.



Delete the template.

*Warning: Once a template is deleted it cannot be recovered.*

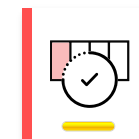
#### import



Import data from files into your template.

[More information on page 20](#)

#### validate



Access data validation settings to create and apply rules to check the quality of data.

[More information page 21](#)

Example 1
dataWizard

settings

import

validate

clean up

filter & delete rows

log

metrics

export

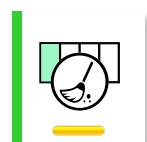
9,871 total records

OrderDate	State	City	Item	Units	Unit Cost	Total	Import File	Import Tab	Import Timestamp
1/1/2014 21:53	FL	Daytona Beach	Whiteboard	12	675.8	8109.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52
1/29/2014 7:47	FL	Miami	Chair	62	227.3	14092.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52
1/16/2014 9:05	FL	Orlando	Whiteboard	91	409.34	37249.94	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52

# Introducing dataWizard buttons

## template (cont.)

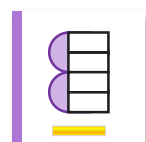
### clean up (by columns)



Access data cleanup settings to create and apply rules to clean up the data in your template.

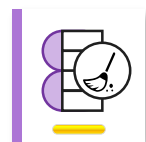
[More information on page 23](#)

### clean up (by rows)



Create groupings of 2 or more rows.

[More information on page 25](#)



Access grouping settings to create and apply rules to clean your groupings.

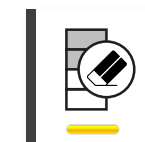
[More information on page 26](#)

### filter & delete rows



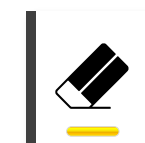
Filter template rows.

- Show rows with data validation errors.
- Show rows with no data validation errors.
- Show all rows (i.e. unfilter template table)



Delete all visible rows.

*Warning: Once the rows are deleted they cannot be recovered.*



Delete all data from the template.

*Warning: Once the data is deleted it cannot be recovered.*

Example 1
dataWizard

settings
import
validate








filter & delete rows
log
metrics
export

9,871 total records

OrderDate	State	City	Item	Units	Unit Cost	Total	Import File	Import Tab	Import Timestamp
1/1/2014 21:53	FL	Daytona Beach	Whiteboard	12	675.8	8109.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52
1/29/2014 7:47	FL	Miami	Chair	62	227.3	14092.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52
1/16/2014 9:05	FL	Orlando	Whiteboard	91	409.34	37249.94	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52

# Introducing dataWizard buttons

## template (cont.)

log

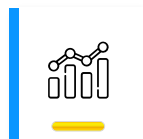
metrics

export



Access Activity Log, which provides an audit trail of actions relevant to your template and its data.

[More information on page 28](#)



Access Data Quality Metrics to check the quality of your data.

[More information on page 27](#)



Export all template data to a new Excel file.

Example 1

9,871 total records

OrderDate	State	City	Item	Units	Unit Cost	Total	Import File	Import Tab	Import Timestamp
1/1/2014 21:53	FL	Daytona Beach	Whiteboard	12	675.8	8109.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52
1/29/2014 7:47	FL	Miami	Chair	62	227.3	14092.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52
1/16/2014 9:05	FL	Orlando	Whiteboard	91	409.34	37249.94	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52

# Using dataWizard

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## Section 3

# Step 1 Creating a new template file(s)



add  
create a new  
template

Template Settings for New Template
✕

Template Name

1 |

**File(s)**

From how many files would you like to import data? 2  One file  Multiple files 3

IMPORT FOLDER – Which folder would you like to scan for data? (All subfolders will be scanned)

4

IMPORT FILE – Select one file that contains data you would like to import.

5

Import data from files where filename (folder path or extensions won't be evaluated)...

6

IMPORT TAB – Select one tab that contains data you would like to import.

Which tabs would you like to search?

Search all tabs.

Limit search to tabs that are named the same.

Limit search to tabs where tab name...

Page 1 of 3

Next >

## userform Import Settings for New Template

Control	Instructions
<b>1. Template Name</b>	Enter a name for the template.
<b>2. Import data from one file</b>	Select this option if you want to import data from just one file.
<b>3. Import data from multiple files</b>	Select this option if you want to import data from multiple files.
<b>4. IMPORT FOLDER – Which folder would you like to scan for data? (All subfolders will be scanned)</b>	Select the folder to be scanned for data. All folders inside the selected folder will be scanned.  <b>Tip:</b> This control will be disabled if you choose to import data from one file.
<b>5. IMPORT FILE – Select one file that contains data you would like to import.</b>	Select the <b>import file</b> (file to be used as reference) for setting up the rest of the template. <ul style="list-style-type: none"> <li>• If the data is imported from a single file, select the file to be imported.</li> <li>• If the data is imported from multiple files, select one of the files that contains data to be imported</li> </ul>
<b>6. Import data from files where filename (folder path extensions won't be evaluated)...</b>	Check this box to narrow down the search to files named following the specified criteria.  <b>Tip:</b> This control will be disabled if you choose to import data from one file.

# Step 1 Creating a new template file(s)



add  
create a new  
template

Template Settings for New Template
10
✕

Template Name

---

**File(s)**

From how many files would you like to import data?  One file  Multiple files

IMPORT FOLDER – Which folder would you like to scan for data? (All subfolders will be scanned)

IMPORT FILE – Select one file that contains data you would like to import.

Import data from files where filename (folder path or extensions won't be evaluated)...

IMPORT TAB – Select one tab that contains data you would like to import.

7

**8** Which tabs would you like to search?

Search all tabs.

Limit search to tabs that are named the same.

Limit search to tabs where tab name...

Page 1 of 3

Next > 9

## userform Import Settings for New Template

Control	Instructions
<b>7. IMPORT TAB – Select one tab that contains data you would like to import.</b>	Select the <b>import tab</b> (tab to be used as reference) for setting up the rest of the template.  <b>Tip:</b> This control will be disabled if the import file is a CSV file.
<b>8. Which tabs would you like to search?</b>	<ul style="list-style-type: none"> <li>• <b>Search all tabs.</b> – Select this option if the data to be imported might come from tabs that do not follow any naming convention. <b>Tip:</b> <i>If you are unsure, we recommend using this option since it is the most inclusive.</i></li> <li>• <b>Limit search to tabs that are named the same.</b> – Select this option if the data to be imported comes from tabs that are named the same as the import tab.</li> <li>• <b>Limit search to tabs where tab name...</b> – Select this option if the data to be imported comes from tabs that follow a naming convention.</li> </ul> <p><b>Tip:</b> This control will be disabled if the import file is a CSV file.</p>
<b>9. Next</b>	Click to continue to the next section.
<b>10. Exit</b>	Click this button to close the Import Settings for New Template userform without saving your changes.



# Step 1 Creating a new template rows



add  
create a new  
template

Template Name

**Rows**

**11** Does the import tab contain a row with column headers?  Yes  No

**12** Select the row that contains the column headers.  ... +/-  rows **13** Offset

Select the first row with data to be considered for import.  ...

Should ALL rows from row TBD on be imported?  Yes  No

Import rows where...

**Condition 1**

And  
 Or

**Condition 2**

Import blank rows (if qualified based on conditions above)

< Back
Page 2 of 3
Next >

## userform Import Settings for New Template

Control	Instructions
<b>11. Does the import tab contain a row with column headers?</b>	<ul style="list-style-type: none"> <li><b>Yes</b> – Select this option if the tab to be imported contains a header row.</li> <li><b>No</b> – Select this option if the tab to be imported does <u>not</u> contain a header row.</li> </ul>
<b>12. Select the row that contains the column headers.</b>	<p>Choose the column header row by double clicking it in the tab preview userform.</p> <p><b>Tip:</b> This control will be disabled if the import tab does not contain a column header row.</p>
<b>13. Offset</b>	<p>If the column headers are always in the same row, set this value to 0. This number will determine which rows are scanned in search of the column header row.</p> <p>Example: If column header row is set to 5 and offset is set to 2, rows 3 (5 - 2) through 7 (5 + 2) will be evaluated in search of the column header row.</p> <p><b>Tip:</b> This control will be disabled if the import tab does not contain a column header row.</p>

# Step 1 Creating a new template rows



add  
create a new  
template

Template Name

### Rows

Does the import tab contain a row with column headers?  Yes  No

Select the row that contains the column headers.  ... +/-  rows

**14** Select the first row with data to be considered for import.  ...

**15** Should ALL rows from row TBD on be imported?  Yes  No

**16** Import rows where...

**Condition 1**

And  
 Or

**Condition 2**

**17**  Import blank rows (if qualified based on conditions above)

**18** < Back Page 2 of 3 Next >

## userform Import Settings for New Template

Control	Instructions
<b>14. Select the first row with data to be considered for import.</b>	Choose the first data row by double clicking it in the tab preview userform. By default this control will be set to the data row right after the column header row.
<b>15. Should ALL rows from row TBD on be imported?</b>	<ul style="list-style-type: none"> <li><b>Yes</b> – Select this option if all rows (starting with the first row that contains data) should be imported.</li> <li><b>No</b> – Select this option if you wish to narrow down the import to rows that meet specific conditions.</li> </ul>
<b>16. Import rows where... (conditions 1 and 2)</b>	Select the condition(s) that must be met by each row for it to be imported.  <b>Tip:</b> These controls will be disabled if you choose to import all rows.
<b>17. Import blank rows (if qualified based on conditions above)</b>	Check the box if blank rows of data should be imported.
<b>18. Back</b>	Click this button to go back to the previous section.

# Step 1 Creating a new template columns



add  
create a new  
template

Template Name

### Columns

**19** IMPORT COLUMNS – Choose the columns you would like to add to the template.

Available Columns		Selected Columns		Data Format
	◀ <b>20</b> ▶		▲ <b>21</b> ▼	

**22** Audit trail columns

<input type="checkbox"/> Show Import Path column	<input checked="" type="checkbox"/> Show Import Tab column
<input checked="" type="checkbox"/> Show Import File column	<input checked="" type="checkbox"/> Show Import Timestamp column

< Back
Page 3 of 3
Submit

## userform Import Settings for New Template

Control	Instructions
<b>19. IMPORT COLUMNS – Choose the columns you would like to add to the template.</b>	Select all columns that you would like to add to the template and click on the right arrow to move them to the box on the right side. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="font-size: small; margin: 0;">Data Format</p> <p style="margin: 0;">Column <input style="width: 100%;" type="text" value="Total"/></p> <p style="margin: 0;">Format <input style="width: 100%;" type="text" value="Accounting"/></p> <p style="text-align: center; margin: 0;">OK Cancel</p> </div> When prompted, select the data format for each one of the columns you wish to import (general, number, currency, date, etc.).
<b>20. Push left &amp; right buttons</b>	Use the left and right arrow buttons to push headers into the <b>Available Columns</b> and <b>Selected Columns</b> lists.
<b>21. Push up &amp; down buttons</b>	Use the up and down arrow buttons to sort the <b>Selected Columns</b> list.
<b>22. Audit trail columns</b>	Check the boxes as needed: <ul style="list-style-type: none"> <li>Show Import Path column</li> <li>Show Import File column</li> <li>Show Import Tab column</li> <li>Show Import Timestamp column</li> </ul>
<b>23. Submit</b>	Click this button if you wish to submit the settings for the new template.

# Step 2 Importing data

Just wait for the import to complete. You can see the progress in the Importing data progress bar...



**import**  
import data  
into the  
template

Importing data into Payments (scanning file 54 of 54)... Please wait.

**Overall progress: 90 %**

File: VBCP Tranche Payments 12-31-16 to 01-06-17.xlsx - Sheet: VBCP Tranche Payments 12-31-16

Extracting data from sheet...

**Records found: 10,479**

As soon as the import job finishes, you will see the results from the import and the template will be filled out with data:

Import Job Results

10,553 records have been found!

**OK**



Example 1

dataWizard

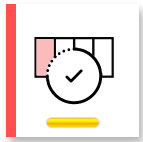
settings import validate clean up filter & delete rows log metrics export

by columns by rows

9,871 total records

OrderDate	State	City	Item	Units	Unit Cost	Total	Import File	Import Tab	Import Timestamp
1/1/2014 21:53	FL	Daytona Beach	Whiteboard	12	675.8	8109.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52
1/29/2014 7:47	FL	Miami	Chair	62	227.3	14092.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52
1/16/2014 9:05	FL	Orlando	Whiteboard	91	409.34	37249.9	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52
1/31/2014 10:30	CA	San Diego	Bookshelf	26	59.85	1556.1	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52
1/18/2014 21:09	FL	Orlando	Door	95	750.22	71270.9	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52
1/20/2014 9:38	FL	Tampa	Bookshelf	37	146.05	5403.85	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/20/20 16:54:52

# Step 3 Validating data



validate  
data  
validation  
settings by  
column

**Data Validation Settings**

Template Name: Example 1

#	Column	Allow	Condition	Value 1	Value 2	Applied	Flags
1	State	Text	is	'FL'		Yes	5,808
2	Total	Whole number	between	1000	2000	-	
3	Units	Text length	equals	3		Yes	9,871

Buttons: Apply, Unapply, **New**, Edit, Delete

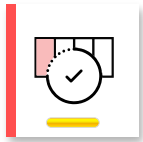
Description: State should be 'FL'.

Close

## userform Data Validation Settings

Control	Instructions
1. <b>New</b>	<p>Click "New" to add a validation rule. Add as many rules as needed.</p> <div data-bbox="2111 487 2446 917"> </div> <ul style="list-style-type: none"> <li>• <b>Column</b> – Select the column that you want to apply the validation rule on.</li> <li>• <b>Allow, Condition and other text fields</b> – Select and enter information as applicable to create the new rule.</li> </ul> <p><b>Tip:</b> See next page to learn how to apply a new validation rule.</p>

# Step 3 Validating data



validate  
data  
validation  
settings by  
column

**Data Validation Settings**

Template Name:

---

**Data Validation**

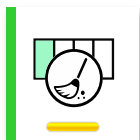
#	Column	Allow	Condition	Value 1	Value 2	Applied	Flags
1	State	Text	is	'FL'		Yes	5,808
2	Total	Whole number	between	1000	2000	-	
3	Units	Text length	equals	3		Yes	9,871

Description: State should be 'FL'.

## userform Data Validation Settings

Control	Instructions
<b>2. Apply</b>	Select one or more existing validation rules and click <b>Apply</b> to apply them.
<b>3. Unapply</b>	Select one or more existing validation rules and click <b>Unapply</b> to unapply the rule.
<b>4. Edit</b>	Select an already created validation rule and click <b>Edit</b> to modify its properties.  <b>Tip:</b> In order to edit a validation rule, the validation rule must be unapplied.
<b>5. Delete</b>	Select an already created validation rule and click <b>Delete</b> to delete the rule.  <b>Tip:</b> In order to delete a validation rule, the validation rule must be unapplied.
<b>6. Close</b>	Click this button to close the Data Validation Settings userform.

# Step 4 Cleaning up data by columns



clean up  
data cleanup  
settings by  
column

**Data Cleanup Settings (Single Column)**

Template Name:

---

**Data Cleanup**

#	Column	Category	Action	Value 1	Value 2	Applied On	Updates
1	City	Modify case	Convert to lower case			03/20/20 18:57:58	9,871
2	Unit Cost	Remove text	Remove text before	'2'		-	
3	Total	Replace text	Replace text (complete match)	'750'	'850'	03/20/20 18:59:22	0

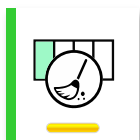
**1**

**Description:** City: Convert to lower case.

## userform Data Cleanup Settings (Single Column)

Control	Instructions
<p><b>1. New</b></p>	<p>Click <b>New</b> to add a cleanup rule. Add as many as needed.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p><b>Data Cleanup: #1</b></p> <p>Template: <input type="text" value="Payments"/></p> <p>Column: <input type="text" value="Tran Code Desc"/></p> <p>Category: <input type="text" value="Replace text"/></p> <p>Action: <input type="text" value="Replace old text with new text"/></p> <p>Old text: <input type="text" value="SkipPayment"/></p> <p>New text: <input type="text" value="Skipped Payment"/></p> <p style="text-align: right;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div> <ul style="list-style-type: none"> <li>• <b>Column</b> – Select the column for which you would like to create the cleanup rule.</li> <li>• <b>Category, Action and other text fields</b> – Define the cleanup rule you would like to create.</li> </ul> <p><b>Tip:</b> See next page to learn how to apply a new cleanup rule.</p>

## Step 4 Cleaning up data by columns



clean up  
data cleanup  
settings by  
column

**Data Cleanup Settings (Single Column)**

Template Name: Example 1

#	Column	Category	Action	Value 1	Value 2	Applied On	Updates
1	City	Modify case	Convert to lower case			03/20/20 18:57:58	9,871
2	Unit Cost	Remove text	Remove text before	'2'		-	
3	Total	Replace text	Replace text (complete match)	'750'	'850'	03/20/20 18:59:22	0

Buttons: Apply (2), New (4), Edit (5), Delete (5), Undo last action (3), Close (6)

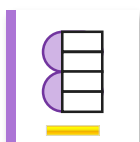
Description: City: Convert to lower case.

### userform Data Cleanup Settings (Single Column)

Control	Instructions
2. <b>Apply</b>	Select one or more existing cleanup rules and click <b>Apply</b> to apply them.
3. <b>Undo last action</b>	Click this button to undo the <b>last</b> cleanup rule that has been applied.  <b>Tip:</b> This button appears only after cleanup rules have been applied.
4. <b>Edit</b>	Select an already created cleanup rule and click <b>Edit</b> to modify its properties.
5. <b>Delete</b>	Select an already created cleanup rule and click <b>Delete</b> to delete the rule.
6. <b>Close</b>	Click this button to close the <b>Data Cleanup Settings (Single Column)</b> userform.



# Step 4 Cleaning up data by rows



clean up group rows

**Group Rows** ✕

1 Number of rows per group

Enter 0 to ungroup rows.

2   3

userform Group Rows

Control	Instructions
1. <b>Number of rows per group</b>	Enter the number of rows for each group.
2. <b>Submit</b>	Click this button to submit the grouping settings.
3. <b>Cancel</b>	Click this button to cancel and close the <b>Group Rows</b> userform.

The row grouping functionality is intended for cases where each individual record is spread out across multiple rows. This functionality lets you bulk clean up all records as needed. As an example, see the input and output of the Timesheet template below:

Client Info	VIN #					
	Year	Make	Model	Color	MSRP	Sale Price
RIBEIRA ALBERTO 6728 BETHMAN STREET LAS VEGAS, NV 89109 XXX-XX-4679	JEDFA123923892323					
ROBERT JACOBS F 12 STATE BROOK CIRCLE SAN CRISTOBAL, CA 91524 XXX-XX-5708	2018	Honda	Civic	Red	23,452.00	23,100.00
LOPEZ EVARISTO C 1982 LAGO CANYON LAS VEGAS, NV 89138 XXX-XX-2198	JEHSA748293893293					
LAURENCE JO WILFRIED N 1284 MORNING CANYON HENDERSON, NV 89213 XXX-XX-2127	2019	Lexus	NX200h	Black	43,023.00	42,389.00
LAURENCE JO WILFRIED N 1284 MORNING CANYON HENDERSON, NV 89213 XXX-XX-2127	BFHSA123923892323					
LAURENCE JO WILFRIED N 1284 MORNING CANYON HENDERSON, NV 89213 XXX-XX-2127	2018	BMW	i850	Red	173,842.00	170,000.00
LAURENCE JO WILFRIED N 1284 MORNING CANYON HENDERSON, NV 89213 XXX-XX-2127	BFHRA987482892323					
LAURENCE JO WILFRIED N 1284 MORNING CANYON HENDERSON, NV 89213 XXX-XX-2127	2018	BMW	M2	Dark Grey	64,038.00	62,387.00
LAURENCE JO WILFRIED N 1284 MORNING CANYON HENDERSON, NV 89213 XXX-XX-2127	JEHSA123923892323					
SANTARITA GERARD A 1043 PIRATES LANE FLOWERVILLE, CA 95278 XXX-XX-5981	2018	Ford	Taurus	Blue	23,982.00	22,300.00
SANTARITA GERARD A 1043 PIRATES LANE FLOWERVILLE, CA 95278 XXX-XX-5981	JEJTH123238923239					
PETICONE HUMBERT J 363 WEST MARKET STREET SAN JUAN, CA 95125 XXX-XX-4103	2018	Jeep	Wrangler	Red	45,238.00	41,232.00
PETICONE HUMBERT J 363 WEST MARKET STREET SAN JUAN, CA 95125 XXX-XX-4103	UIRSA1239C2389323					
PETICONE HUMBERT J 363 WEST MARKET STREET SAN JUAN, CA 95125 XXX-XX-4103	2018	Porsche	Boxster	Black	78238	73,028.00
IVON RYAN 2056 NIKON PERDIDO COURT ATWINE, CA 92901 XXX-XX-5968	JEOPA123923892323					
IVON RYAN 2056 NIKON PERDIDO COURT ATWINE, CA 92901 XXX-XX-5968	2018	Honda	Civic	Red	23,452.00	23,452.00

Input



**Example 1**

settings import validate clean up filter & delete rows

by columns by rows

8 total records

Client Info	Year	Make	Model	MSRP	Sale Price	Import Tab	Import Timestamp
RIBEIRA ALBERTO	2018	Honda	Civic	\$ 23,452.00	\$ 23,100.00	Auto Sales	10/23/2019 16:19
ROBERT JACOBS F	2019	Lexus	NX200h	\$ 43,023.00	\$ 42,389.00	Auto Sales	10/23/2019 16:19
LOPEZ EVARISTO C	2018	BMW	i850	\$ 173,842.00	\$ 170,000.00	Auto Sales	10/23/2019 16:19
LAURENCE JO WILFRIED N	2018	BMW	M2	\$ 64,038.00	\$ 62,387.00	Auto Sales	10/23/2019 16:19
LAURENCE JO WILFRIED N	2018	Ford	Taurus	\$ 23,982.00	\$ 22,300.00	Auto Sales	10/23/2019 16:19
SANTARITA GERARD A	2018	Jeep	Wrangler	\$ 45,238.00	\$ 41,232.00	Auto Sales	10/23/2019 16:19
PETICONE HUMBERT J	2018	Porsche	Boxster	\$ 78,238.00	\$ 73,028.00	Auto Sales	10/23/2019 16:19
IVON RYAN	2018	Honda	Civic	\$ 23,452.00	\$ 23,452.00	Auto Sales	10/23/2019 16:19

Output

# Step 4 Cleaning up data by rows

  
clean up  
group cleanup  
settings

The top screenshot shows the 'Grouping Cleanup Menu' dialog box with the 'Template Name' field set to 'Example 1'. The 'Copy/paste values' radio button is selected, and a red circle with the number '1' is next to it. The 'Delete rows' radio button is unselected.

The bottom screenshot shows the same dialog box with the 'Copy/paste values' radio button selected. The 'COPY' section has three fields: 'Column' (dropdown), 'Row' (dropdown), and 'Value in first grouping' (text box). The 'PASTE' section has three fields: 'Column' (dropdown), 'Row(s)' (dropdown), and 'Value(s) that will be overwritten' (text box). A 'Paste' button is at the bottom. Red circles with letters 'a' through 'g' are placed around the fields: 'a' next to the 'Column' dropdown in the COPY section, 'b' next to the 'Row' dropdown in the COPY section, 'c' next to the 'Value in first grouping' text box in the COPY section, 'd' next to the 'Column' dropdown in the PASTE section, 'e' next to the 'Row(s)' dropdown in the PASTE section, 'f' next to the 'Value(s) that will be overwritten' text box in the PASTE section, and 'g' next to the 'Paste' button.

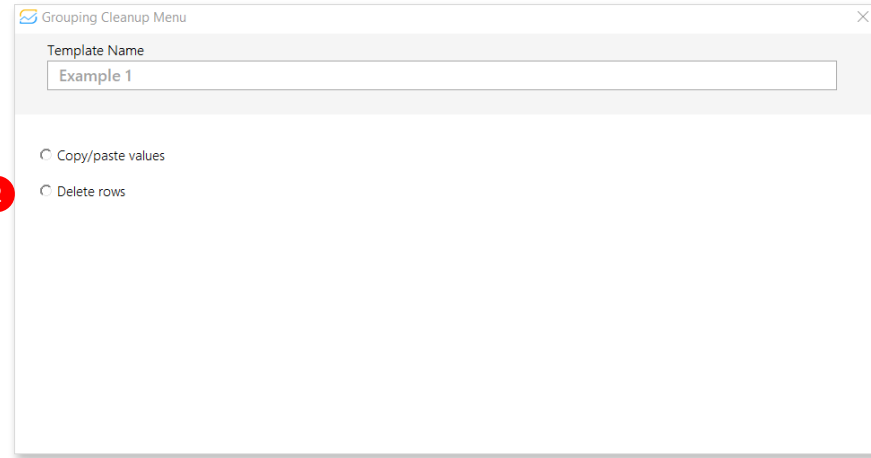
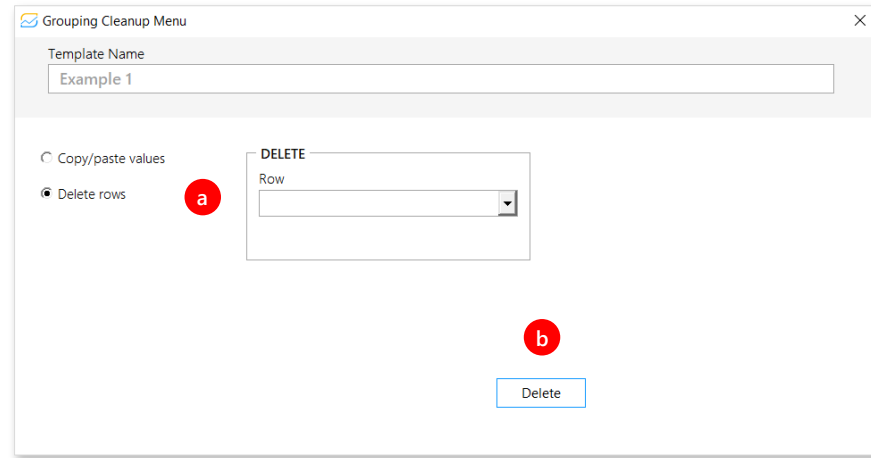
## userform Grouping Cleanup Menu

Control	Instructions
<b>1. Copy/paste values</b>	Select this option to copy and paste values within groupings.  <b>Tip:</b> The Copy/paste values function will take the value in the row of each grouping and it will paste it in the row(s) in the same column.
<b>COPY frame</b>	
<b>a. Column</b>	Choose from the dropdown the column to copy.
<b>b. Row</b>	Choose from the dropdown the row to copy.
<b>c. Value in first grouping</b>	This box is only for reference. It displays the value to be copied from the first grouping.
<b>PASTE frame</b>	
<b>d. Column</b>	Select from the dropdown the column to overwrite.
<b>e. Row(s)</b>	Choose from the dropdown the column to overwrite.
<b>f. Value(s) that will be overwritten</b>	This box is only for reference. It displays the value that will be overwritten from the first grouping.
<b>g. Paste</b>	Click this button execute the copy/paste action.

# Step 4 Cleaning up data by rows



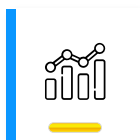
clean up  
group cleanup  
settings

## userform Grouping Cleanup Menu

Control	Instructions
<b>2. Delete rows</b>	Select this option to delete rows within groupings.  <b>Tip:</b> The Delete rows function will delete the selected row from every grouping in the template.
<b>DELETE frame</b>	
<b>a. Row</b>	Select from the dropdown the row to delete within groupings.
<b>b. Delete</b>	Click this button to execute the delete action.

# Data quality metrics



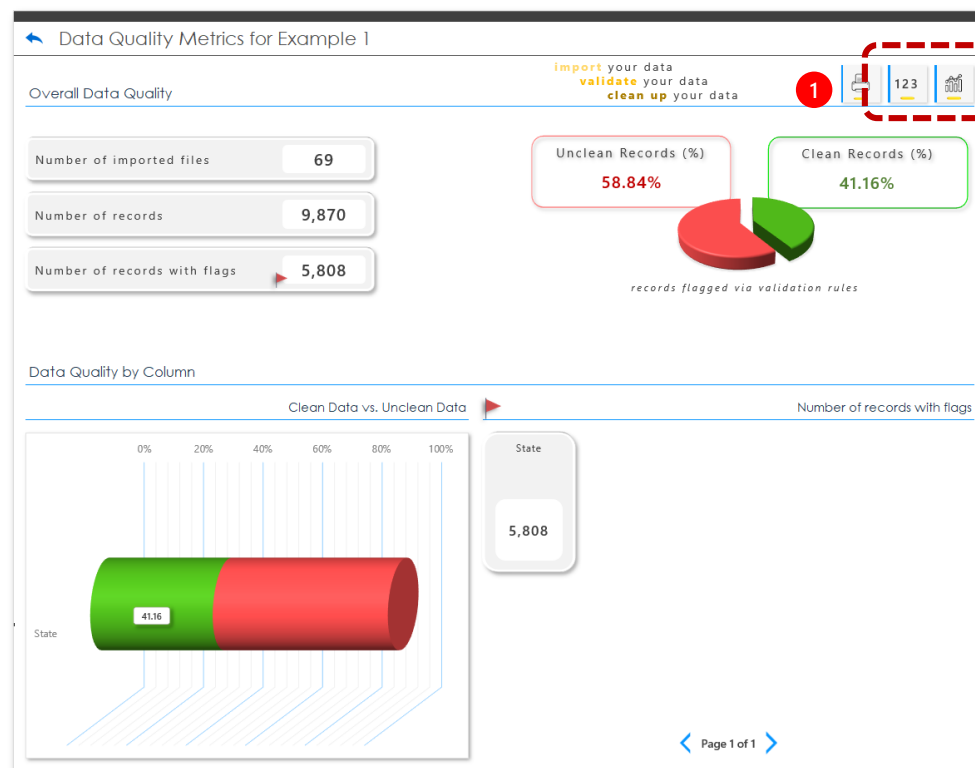
metrics  
data quality  
metrics

The Data Quality Metrics page contains two sections:

- Overall data quality
- Data quality by column

1. This page has two views: chart view and table view. You can switch views by clicking on the top right buttons.

## Chart view



## Table view

**Data Quality Metrics for Example 1**

Overall Data Quality

- Number of import files: 69
- Number of records: 9,870
- Number of records with flags: 5,808
- Clean Records (%): 41.16%
- Unclean Records (%): 58.84%

Data Quality by Column

Column	Number of rules applied	Number of records with flags	Clean Data Points (%)	Unclean Data Points (%)
State	1	5,808	41.16%	58.84%

# Activity log

The Activity Log is an audit trail report with a chronological sequence of actions that have been performed. It contains evidence as to the origin and integrity of the data.

You may access the Activity Log from the Home page or from a specific template.



log  
activity log

Ref.	Date & Time	Template	Code	Action	Description	More Info
56	10/20/19 12:08:38	Payments	Notification	Import data into template	Job finished.	Records found: 10,553 Files scanned: 54
55	10/20/19 12:08:16	Payments	Notification	Import data into template	Job started.	
54	10/20/19 12:08:16	Payments	Notification	Clear template	All data has been deleted.	
53	10/20/19 11:59:42	Payments	Notification	Apply data cleanup settings	Data cleanup rule applied.	Rule description: Form of Payment: Convert to UPPER CASE
52	10/20/19 11:59:38	Payments	Notification	Apply data cleanup settings	Data cleanup rule applied.	Rule description: Tran Code Desc: Replace SkipPayment with Skipped Payment.
51	10/20/19 11:42:13	Payments	Notification	Import data into template	Job finished.	Records found: 10,553 Files scanned: 54
50	10/20/19 11:40:14	Payments	Notification	Import data into template	Job started.	
49	10/20/19 11:40:14	Payments	Notification	Clear template	All data has been deleted.	
48	10/20/19 11:19:37	Payments	Notification	Group rows	Row groupings set to 3 rows.	
47	10/20/19 11:19:21	Payments	Notification	Delete visible rows	2 visible rows deleted.	
46	10/20/19 11:16:01	Payments	Notification	Import data into template	Job finished.	Records found: 10,553 Files scanned: 54
45	10/20/19 11:15:29	Payments	Notification	Import data into template	Job started.	
44	10/20/19 11:15:05	Payments	Notification	Add template	Template created.	
43	10/20/19 11:13:28	Sales Orders	Notification	Import data into template	Job finished.	Records found: 100,000 Files scanned: 631
42	10/20/19 11:07:36	Sales Orders	Notification	Import data into template	Job started.	
41	10/19/19 12:22:10	AD	Notification	Import data into template	Job started.	
40	10/19/19 12:22:06	AD	Notification	Add template	Template created.	
39	10/19/19 12:18:47	Sales Orders	Notification	Import data into template	Job finished.	Records found: 20,000 Files scanned: 71
38	10/19/19 12:17:26	Sales Orders	Notification	Import data into template	Job started.	
37	10/19/19 12:17:26	Sales Orders	Notification	Clear template	All data has been deleted.	
36	10/19/19 12:17:20	Sales Orders	Notification	Import data into template	Job finished.	Records found: 20,000 Files scanned: 71
35	10/19/19 12:16:34	Sales Orders	Notification	Import data into template	Job started.	
34	10/19/19 12:16:34	Sales Orders	Notification	Clear template	All data has been deleted.	
33	10/19/19 10:39:01	Sales Orders	Notification	Import data into template	Job finished.	Records found: 20,000 Files scanned: 71
32	10/19/19 10:38:30	Sales Orders	Notification	Import data into template	Job started.	
31	10/19/19 10:38:30	Sales Orders	Notification	Clear template	All data has been deleted.	

# Data cleanup rules explained

---

## Section 4

# Apply mathematical operation

## Input

- ✓ A number

## Actions

Action	Description	Example		
		Current value	Input number	New value
<b>Add</b>	Adds input number to the existing value.	100	4	104
<b>Subtract</b>	Subtracts input number from current value.	100	4	96
<b>Multiply</b>	Multiplies current value by input number.	100	4	400
<b>Divide</b>	Divides current value by input number.	100	4	25

# Convert data type

## Input

✓ Current data type

- Y: year\*
- M: month\*
- D: day
- h: hour
- m: minute
- s: second
- d: decisecond (0.1s)
- c: centisecond (0.01s)
- l: millisecond (0.001s)
- n: nanosecond (10<sup>-9</sup>s)

\* Only applicable when  
Action = Convert number to date

## Actions

Action	Description	Example		
		Current value	Current data type	New value
<b>Convert number to date</b>	Converts current value from current data type to a date.	20200202008421	YYYYMMDDsssss	02/02/2020 02:20:21
<b>Convert number to duration (days)</b>	Converts current value from current data type to duration in days.	12462353	sssssss	144.240196759259
<b>Convert number to duration (hours)</b>	Converts current value from current data type to duration in hours.	04235982	DDhhmmss	120.006111111111
<b>Convert number to duration (minutes)</b>	Converts current value from current data type to duration in minutes.	234804	dddddd	391.34
<b>Convert number to duration (seconds)</b>	Converts current value from current data type to duration in seconds.	1259959	hhmmss	455,999
<b>Convert number to duration (deciseconds)</b>	Converts current value from current data type to duration in deciseconds.	420401	hhmmss	1,514,410
<b>Convert number to duration (centiseconds)</b>	Converts current value from current data type to duration in centiseconds.	10938	sssss	1,093,800
<b>Convert number to duration (milliseconds)</b>	Converts current value from current data type to duration in milliseconds.	00402	ssscc	4,020
<b>Convert number to duration (nanoseconds)</b>	Converts current value from current data type to duration in nanoseconds.	25001	ssmmm	85,000,000,000



# Insert text

## Input

✓ New text

## Actions

Action	Description	Example		
		Current value	New text	New value
<b>Insert text at the beginning</b>	Inserts new text at the beginning of the current value.	0203001	INV-	INV-0203001
<b>Insert text at the end</b>	Inserts new text at the end of the current value.	Newport Beach	, CA	Newport Beach, CA

\* Only applicable when  
Action = Convert number to date

# Modify case

## Input

No input

## Actions

Action	Description	Example	
		Current value	New value
<b>Convert to lower case</b>	Converts current value to lower case.	The brown fox	the brown fox
<b>Convert to Title Case</b>	Converts current value to title case.	The brown fox	The Brown Fox
<b>Convert to UPPER CASE</b>	Converts current value to upper case.	The brown fox	THE BROWN FOX

# Remove text

## Input

✓ Text to remove

## Actions

Action	Description	Example		
		Current value	Input text	New value
<b>Remove text before</b>	Removes from current value any text that precedes input text.	ABCDEFGHI	DEF	DEFGHI
<b>Remove text before and including</b>	Removes from current value the first instance of input text and any text that precedes it.	ABCDEFGHI	DEF	GHI
<b>Remove text after</b>	Removes from current value any text that goes after last instance of input text.	ABCDEFGHI	DEF	ABCDEF
<b>Remove text after and including</b>	Removes from current value the last instance of input text and any text after it.	ABCDEFGHI	DEF	ABC

# Remove number of character

## Input

- ✓ Number of characters to remove

## Actions

Action	Description	Example		
		Current value	Input number	New value
<b>Remove X leading characters</b>	Removes X number of characters starting at the beginning of the current value.	ABCDEFGHI	3	DEFGHI
<b>Remove X trailing characters</b>	Removes X number of characters starting at the end of the current value.	ABCDEFGHI	3	ABCDEF

# Remove unwanted characters

## Input

No input

## Actions

Action	Description	Example	
		Current value	New value
<b>Remove leading whitespaces</b>	Removes leading whitespaces from current value.	__San Francisco__	San Francisco__
<b>Remove leading and trailing whitespaces</b>	Remove leading and trailing whitespaces from current value.	__San Francisco__	San Francisco
<b>Remove trailing whitespaces</b>	Removes trailing whitespaces from current value.	__San Francisco__	__San Francisco
<b>Remove tabs</b>	Removes tabulator key characters from current value.	San          Francisco	SanFrancisco
<b>Remove line breaks</b>	Removes all line breaks from current value.	Irvine, CA_ 92618	Irvine, CA 92618
<b>Remove duplicate whitespaces</b>	Removes duplicate whitespaces from current value.	San__Diego	San_Diego
<b>Remove all whitespaces</b>	Removes all whitespaces from current value.	__San_Diego__	SanDiego
<b>Remove all letters</b>	Removes all letters from current value.	123ab456cd789	123456789
<b>Remove all numbers</b>	Removes all numbers from current value.	123ab456cd789	abcd

# Replace text

## Input

- ✓ Old text
- ✓ New text

## Actions

Action	Description	Example			
		Current value	Old text	New text	New value
<b>Replace text (complete match)</b>	Replaces old text with new text if current value matches old text.	ABCDEFGHI	DEF	XYZ	ABCDEFGHI
		ABCDEFGHI	ABCDEFGHI	XYZ	XYZ
<b>Replace text (complete and partial match)</b>	Replaces old text with new text.	ABCDEFGHI	DEF	XYZ	ABCXYZGHI
		ABCDEFGHI	ABCDEFGHI	XYZ	XYZ
<b>Replace text (partial match)</b>	Replaces old text with new text if current value does not fully match old text.	ABCDEFGHI	DEF	XYZ	ABCXYZGHI
		ABCDEFGHI	ABCDEFGHI	XYZ	ABCDEFGHI

# Template columns explained

---

## Section 5

# Column sources

The screenshot shows the dataWizard interface with a table titled "Example 2". The table has 10 columns: OrderDate, State, City, Item, Units, Unit Cost, Total, New Total, Import File, Import Tab, and Import Timestamp. The first seven columns are highlighted in white, the "New Total" column is highlighted in yellow, and the last three columns are highlighted in blue. A red dashed box encloses the first seven columns, with a red circle containing the number "1" to its left. A red circle containing the number "2" is placed above the "New Total" column. A red circle containing the number "3" is placed to the right of the "Import Timestamp" column. The interface also shows various toolbars for settings, import, validate, clean up, filter & delete rows, log, metrics, and export.

Template Columns	Color	Description	Example
1. Import columns	White	Columns imported from the template	From example above: The user imported <b>OrderDate, State, City, Item, Units, Unit Cost</b> and <b>Total</b> from import files.
2. Calculated columns	Yellow	Columns created from Import columns (for more info on how to add calculated columns, see Insert Column slide)	From example above: To verify the accuracy of the <b>Total</b> column, the user inserted a new column that displays the product of Units times Unit Cost.
3. Audit Trail columns	Blue	Columns used for audit trail purposes	<b>Import Path</b> displays the path of the file(s) imported <b>Import File</b> displays the name of the file(s) imported <b>Import Tab</b> displays the name of the tab(s) imported <b>Import Timestamp</b> displays the date and time when the record is imported



# Column actions **View column source**

Example 2

9,870 total records

OrderDate	State	City	Item	Units	Unit Cost	Total	New Total	Import File	Import Tab	Import Timestamp
1/1/2014 21:53	FL	Daytona Beach	Whiteboard	12	675.8	8109.6	8109.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/21/20 11:26:12

Item

- View column source
- Column actions
  - [Insert column](#)
  - [Edit formula](#)
  - [Rename column](#)
  - [Move column](#)
  - [Delete column](#)
- Template actions

userform *[name of column]*

Control	Instructions
1. Column headers	Right click on any column header to activate the <b>Column</b> userform for that specific header.
2. View column source	Click on <b>View column source</b> to see the column source: Import, Calculated or Audit Trail. For more info see <b>Column sources</b> slide.

# Column actions Insert column

Example 2

9,870 total records

OrderDate	State	City	Item	Units	Unit Cost	Total	New Total	Import File	Import Tab	Import Timestamp
1/1/2014 21:53	FL	Daytona Beach	Whiteboard	12	675.8	8109.6	8109.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/21/20 11:26:12

Item

- View column source
- Column actions
  - 2** Insert column
  - Edit formula
  - Rename column
  - Move column
  - Delete column
- Template actions

Insert Column

3 Position  
To the **left** of **Units**

4 Name  
**Column Example**

5 Formula

6 [Add column reference](#)

7 Submit    8 Cancel

## userform Insert Column

Control	Instructions
1. Column headers	Right click on any column header to activate the <b>Column</b> userform for that specific header.
2. Insert column	Click on <b>Insert column</b> to display the <b>Insert Column</b> userform.
3. Position	Choose from the <b>To the</b> and <b>of</b> dropdowns to select where to position the new column to be inserted.
4. Name	Enter a name for the new column.
5. Formula	Input formula to calculate the new column to be inserted.
6. Add column reference	When adding the formula in previous step, click on <b>Add column reference</b> to choose the column(s) that you want to add to the formula.
7. Submit	Click this button if you wish to submit the settings for the new column.
8. Cancel	Click this button to cancel and close the <b>Insert Column</b> userform.

# Column actions **Edit formula**

Example 2

9,870 total records

OrderDate	State	City	Item	Units	Unit Cost	Total	New Total	Import File	Import Tab	Import Timestamp
1/1/2014 21:53	FL	Daytona Beach	Whiteboard	12	675.8	8109.6	8109.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/21/20 11:26:12

New Total

- View column source
- Column actions
  - Insert column
  - Edit formula**
  - Rename column
  - Move column
  - Delete column
- Template actions

Edit Formula: New Total

Formula

**3**

**4** [Add column reference](#)

**5**

**6**

userform Edit Formula: *[name of column]*

Control	Instructions
<b>1. Column headers</b>	Right click on the header of any <b>Calculated</b> column to activate the <b>Column</b> userform for that specific header.
<b>2. Edit formula</b>	Click on <b>Edit formula</b> to display the <b>Edit Formula: [name of column]</b> userform.
<b>3. Formula</b>	Edit the formula of the <b>Calculated</b> column.  <b>Tip:</b> You can only <b>Edit formula</b> in <b>Calculated</b> columns.
<b>4. Add column reference</b>	When editing the formula, click on <b>Add column reference</b> to choose the column(s) that you want to add to the formula.
<b>5. Submit</b>	Click this button if you wish to submit the settings for the <b>Calculated</b> column.
<b>6. Cancel</b>	Click this button to cancel and close the <b>Edit Formula: [name of column]</b> userform.

# Column actions **Rename column**

Example 2

9,870 total records

OrderDate	State	City	Item	Units	Unit Cost	Total	New Total	Import File	Import Tab	Import Timestamp
1/1/2014 21:53 FL	Daytona Beach	Whiteboard		12	675.8	8109.6	8109.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/21/20 11:26:12

Item

- View column source
- Column actions
  - [Insert column](#)
  - [Edit formula](#)
  - 2** [Rename column](#)
  - [Move column](#)
  - [Delete column](#)
- Template actions

Rename Column: Units

New Name

**3**

**4**  **5**

userform **Rename Columns:** *[name of column]*

Control	Instructions
<b>1. Column headers</b>	Right click on any column header to activate the <b>Column</b> userform for that specific header.
<b>2. Rename column</b>	Click on <b>Rename column</b> to display the <b>Rename Column: [current name of column]</b> userform. In this example, the current name of the column is "Units".
<b>3. New Name</b>	Enter a new name for the column.  <b>Tip:</b> You can only <b>Rename column</b> in <b>Imported</b> and <b>Calculated</b> columns.
<b>4. Submit</b>	Click this button if you wish to submit the settings for the renamed column.
<b>5. Cancel</b>	Click this button to cancel and close the <b>Rename Column: [current name of column]</b> userform.

# Column actions **Move column**

Example 2

9,870 total records

OrderDate	State	City	Item	Units	Unit Cost	Total	New Total	Import File	Import Tab	Import Timestamp
1/1/2014 21:53 FL		Daytona Beach	Whiteboard	12	675.8	8109.6	8109.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/21/20 11:26:12

Item

- View column source
- Column actions
  - Insert column
  - Edit formula
  - Rename column
  - 2 Move column**
  - Delete column
- Template actions

Move Column: Units

New Position

**3** To the  of

**4** Submit **5** Cancel

userform Move Column: *[name of column]*

Control	Instructions
<b>1. Column headers</b>	Right click on any column header to activate the <b>Column</b> userform for that specific header.
<b>2. Move column</b>	Click on <b>Move column</b> to display the <b>Move Column: <i>[name of column]</i></b> userform. In this example, the name of the column we want to move is "Units".
<b>3. New Position</b>	Choose from the <b>To the</b> and <b>of</b> dropdowns to select the new position of the column.  <b>Tip:</b> You can only <b>Move column</b> in <b>Imported</b> and <b>Calculated</b> columns.
<b>4. Submit</b>	Click this button if you wish to submit the settings for the column's new position.
<b>5. Cancel</b>	Click this button to cancel and close the <b>Move Column: <i>[name of column]</i></b> userform.

# Column actions Delete column

Example 2

9,870 total records

OrderDate	State	City	Item	Units	Unit Cost	Total	New Total	Import File	Import Tab	Import Timestamp
1/1/2014 21:53	FL	Daytona Beach	Whiteboard	12	675.8	8109.6	8109.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/21/20 11:26:12

Item

- View column source
- Column actions
  - Insert column
  - Edit formula
  - Rename column
  - Move column
  - 2 Delete column**
- Template actions

Delete Units?

Are you sure you would like to delete this column?

Yes No

userform Delete [name of column]?

Control	Instructions
1. Column headers	Right click on any column header to activate the <b>Column</b> userform for that specific header.
2. Delete column	Click on <b>Delete column</b> to display the <b>Delete [name of column]?</b> userform. In this example, the name of the column we want to delete is "Units".
3. Yes	Click <b>Yes</b> to delete the column.
4. No	Click <b>No</b> to do <u>not</u> delete the column.

# Column actions **Template actions**

Example 2

9,870 total records

OrderDate	State	City	Item	Units	Unit Cost	Total	New Total	Import File	Import Tab	Import Timestamp
1/1/2014 21:53 FL		Daytona Beach	Whiteboard	12	675.8	8109.6	8109.6	A+ Classroom Supplies_Sales Orders_2014-01.xlsx	SalesOrders_2014-01	03/21/20 11:26:12

Item

- View column source
- Column actions
  - Insert column
  - Edit formula
  - Rename column
  - Move column
  - Delete column
- Template actions

Item

- View column source
- Column actions
  - Insert column
  - Edit formula
  - Rename column
  - Move column
  - Delete column
- Template actions
  - settings
    - Template settings
    - Column widths and data formats
    - Duplicate template
    - Delete template
  - import
    - Import data
  - validate
    - Data validation settings
  - clean up
    - Data cleanup settings by column
    - Group rows
    - Data cleanup settings by grouping
  - filter & delete rows
    - Show rows with flags
    - Show rows with no flags
    - Show all rows
    - Delete all visible rows
    - Delete all template data
  - log
    - Activity log
  - metrics
    - Data quality metrics
  - export
    - Export template data to raw file

userform [name of column]

Control	Instructions
1. Column headers	Right click on any column header to activate the <b>Column</b> userform for that specific header.
2. Template actions	Click on <b>Template actions</b> to display all <b>Settings, Import, Validate, Clean up, Filter and delete rows, Log, Metrics, and Export</b> actions.  <b>Tip:</b> The Template actions match the buttons in the ribbon.

**Tip:** This control comes in handy when working with wide templates that may require scrolling to the right.

