

# **Word/Excel Training**

1. Editing Reports from Workflows
2. Importing Data to Excel
3. Converting text to Date
4. Remove unique rows
5. Editing Excel for use with Word Mail Merge
6. Creating a Word Mail Merge

# Editing Reports from Workflows

View your Workflows report

**Change the margins to at least Narrow**

Click on Page Layout

Click on Margins

Click on Narrow. If you want to make the margins smaller, click on Custom Margins at the bottom.

**Now remove the report title and the date the report was run.**

Click on Home

Highlight the Title

Copy the highlighted text

Click Replace

Paste in the Find what:

At the end of the text line put in a paragraph mark (^p)

Leave Replace with: blank

Click on Replace All

Remove the blank line next

Highlight the blank line that is between the title and the date

Copy the blank line

Click Replace

Paste in the Find what:

At the end of the blank line put in a paragraph mark (^p)

Leave Replace with: blank

Click on Replace All

Remove the date of the report next

Highlight the Date of the report

Copy the highlighted text

Click Replace

Paste in the Find what:

At the end of the text line put in a paragraph mark (^p)

Leave Replace with: blank

Click on Replace All

**Remove extra blank lines**

Click on Replace

In the Find what: field type 2 or 3 paragraph marks (^p^p)

In the Replace with: field type 1 or 2 paragraph marks (^p)

Click on Replace All, Repeat the Replace All until you only have one or two lines being replaced.

Now your report should be a little easier to read and you can finish editing it manually.

If you plan on importing your report into Excel you will need to save the report as a txt file.

Click on the Microsoft Office Button in the upper left corner

Mouse over Save As

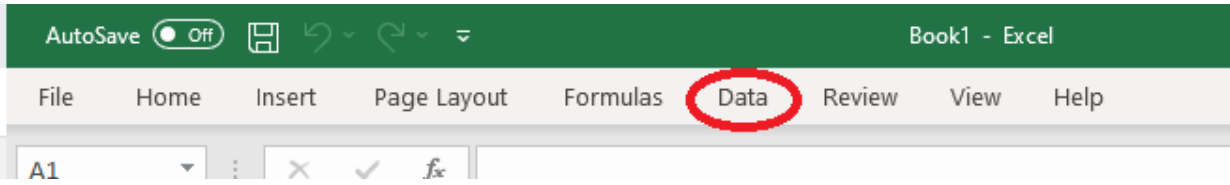
Click on Other Formats

Save as type: change to Plain Text (\*.txt)

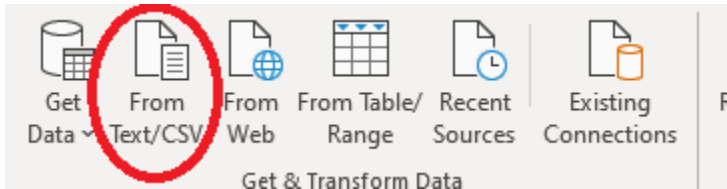
# How to import a text or csv file into excel. (Office 365)

Open Excel

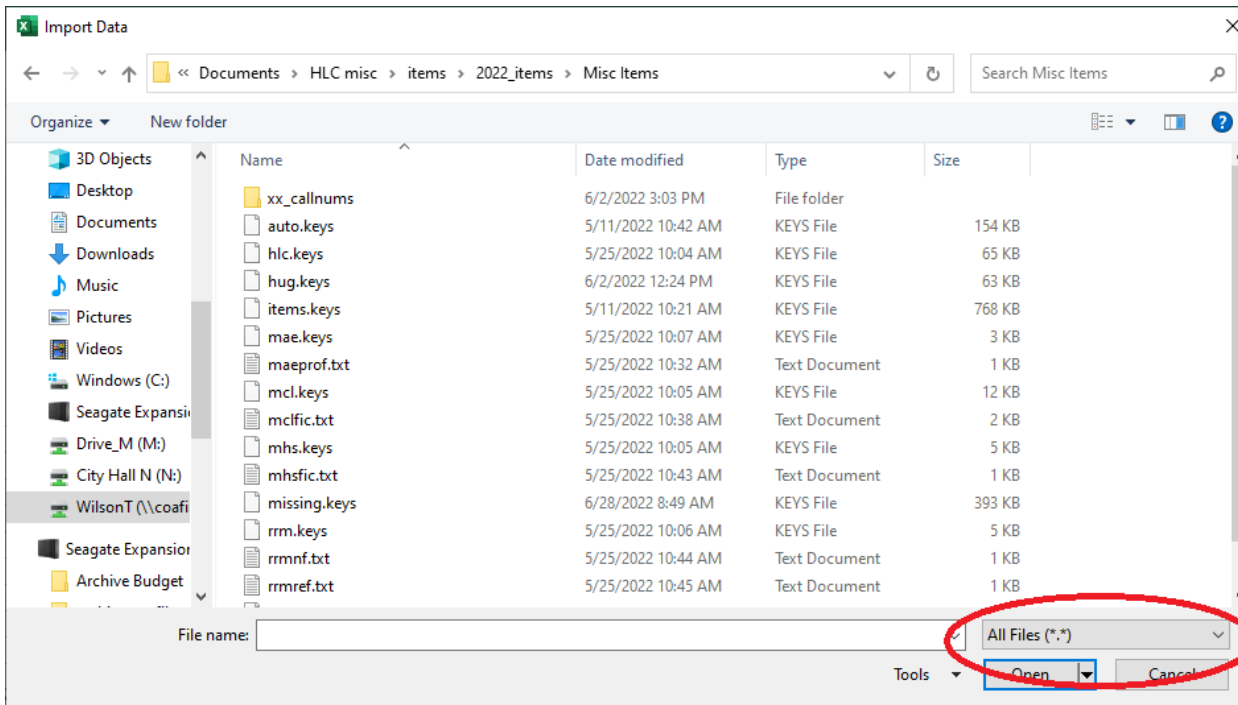
Click on Data



Click on Text/CSV



Navigate to where you have the file saved you want to import. You may need to change the selection to All Files.



Select your file and click Import

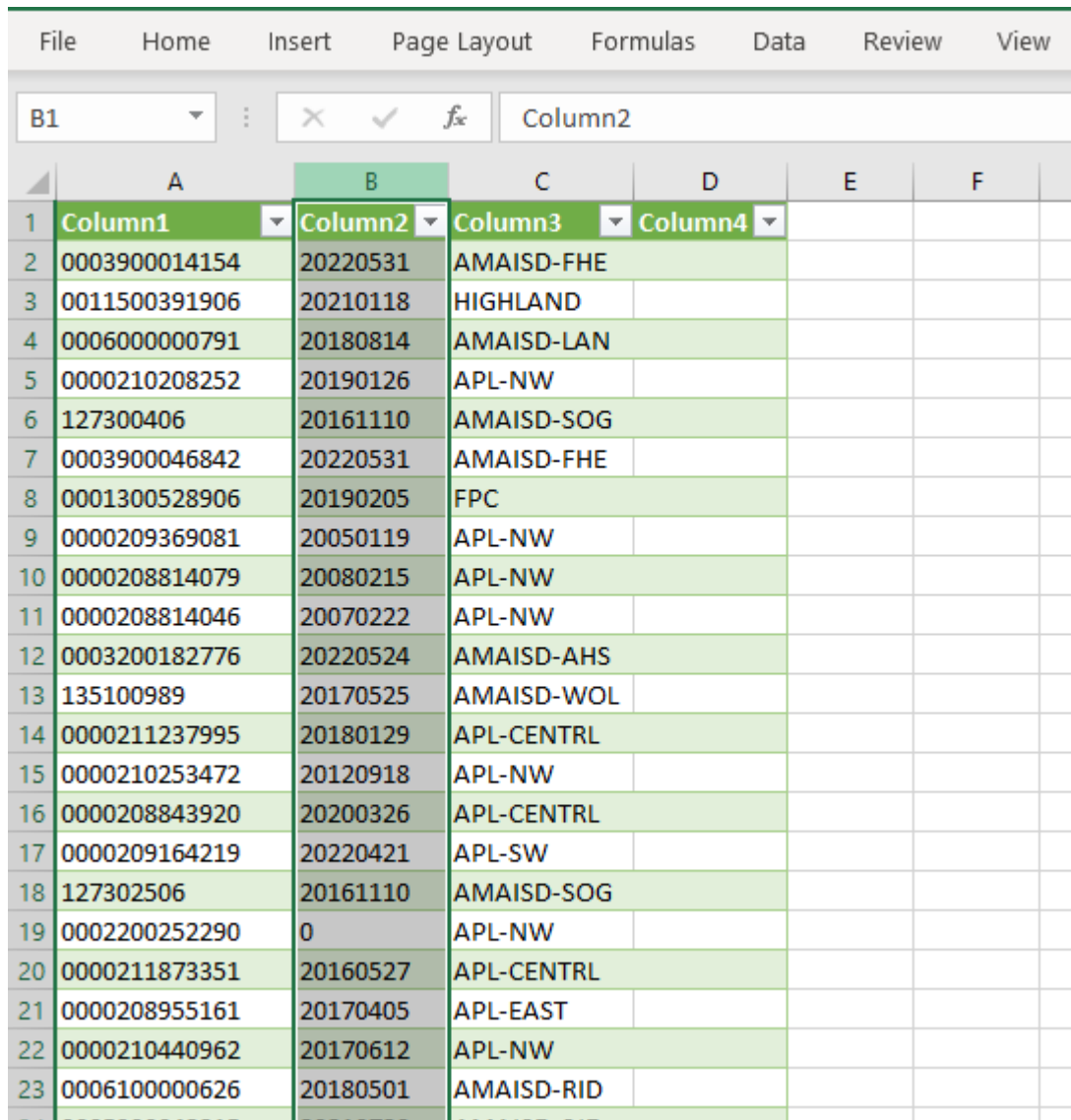
For most imports from Sirsi you will select Delimiter –Custom--, Date Type Detection Do not detect data types, Under Delimiter selection put a pipe symbol (|), then click Load.

The screenshot shows the 'missing.keys' import dialog box. The 'File Origin' is set to '1252: Western European (Windows)'. The 'Delimiter' dropdown is set to '--Custom--' and the 'Data Type Detection' dropdown is set to 'Do not detect data types'. A table of data is visible below, and the 'Load' button is circled in red.

Column1	Column2	Column3	Column4
0003900014154	20220531	AMAISD-FHE	
0011500391906	20210118	HIGHLAND	
0006000000791	20180814	AMAISD-LAN	
0000210208252	20190126	APL-NW	
127300406	20161110	AMAISD-SOG	
0003900046842	20220531	AMAISD-FHE	
0001300528906	20190205	FPC	
0000209369081	20050119	APL-NW	
0000208814079	20080215	APL-NW	
0000208814046	20070222	APL-NW	
0003200182776	20220524	AMAISD-AHS	
135100989	20170525	AMAISD-WOL	
0000211237995	20180129	APL-CENTRL	
0000210253472	20120918	APL-NW	
0000208843920	20200326	APL-CENTRL	
0000209164219	20220421	APL-SW	
127302506	20161110	AMAISD-SOG	
0002200252290	0	APL-NW	
0000211873351	20160527	APL-CENTRL	
0000208955161	20170405	APL-EAST	

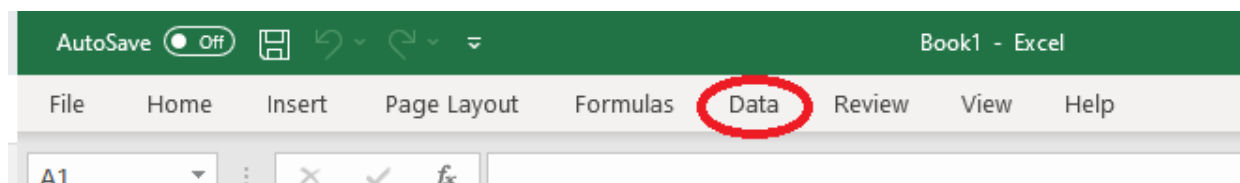
## How to convert text field to date (Office 365) 1<sup>st</sup> Option

Select the column you want to convert to a date.

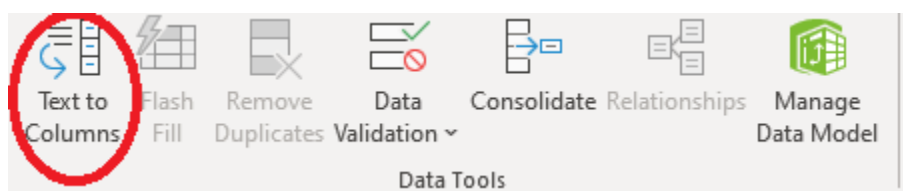


	A	B	C	D	E	F
1	Column1	Column2	Column3	Column4		
2	0003900014154	20220531	AMAISD-FHE			
3	0011500391906	20210118	HIGHLAND			
4	0006000000791	20180814	AMAISD-LAN			
5	0000210208252	20190126	APL-NW			
6	127300406	20161110	AMAISD-SOG			
7	0003900046842	20220531	AMAISD-FHE			
8	0001300528906	20190205	FPC			
9	0000209369081	20050119	APL-NW			
10	0000208814079	20080215	APL-NW			
11	0000208814046	20070222	APL-NW			
12	0003200182776	20220524	AMAISD-AHS			
13	135100989	20170525	AMAISD-WOL			
14	0000211237995	20180129	APL-CENTRL			
15	0000210253472	20120918	APL-NW			
16	0000208843920	20200326	APL-CENTRL			
17	0000209164219	20220421	APL-SW			
18	127302506	20161110	AMAISD-SOG			
19	0002200252290	0	APL-NW			
20	0000211873351	20160527	APL-CENTRL			
21	0000208955161	20170405	APL-EAST			
22	0000210440962	20170612	APL-NW			
23	0006100000626	20180501	AMAISD-RID			

Click on Data



Click Text to Columns in Data Tools



Click Next

Convert Text to Columns 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:

Delimited - Characters such as commas or tabs separate each field.

Fixed width - Fields are aligned in columns with spaces between each field.

Preview of selected data:

1	Column2
2	20220531
3	20210118
4	20180814
5	20190126

Cancel < Back **Next >** Finish

Click Next

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

Tab

Semicolon

Comma

Space

Other:

Treat consecutive delimiters as one

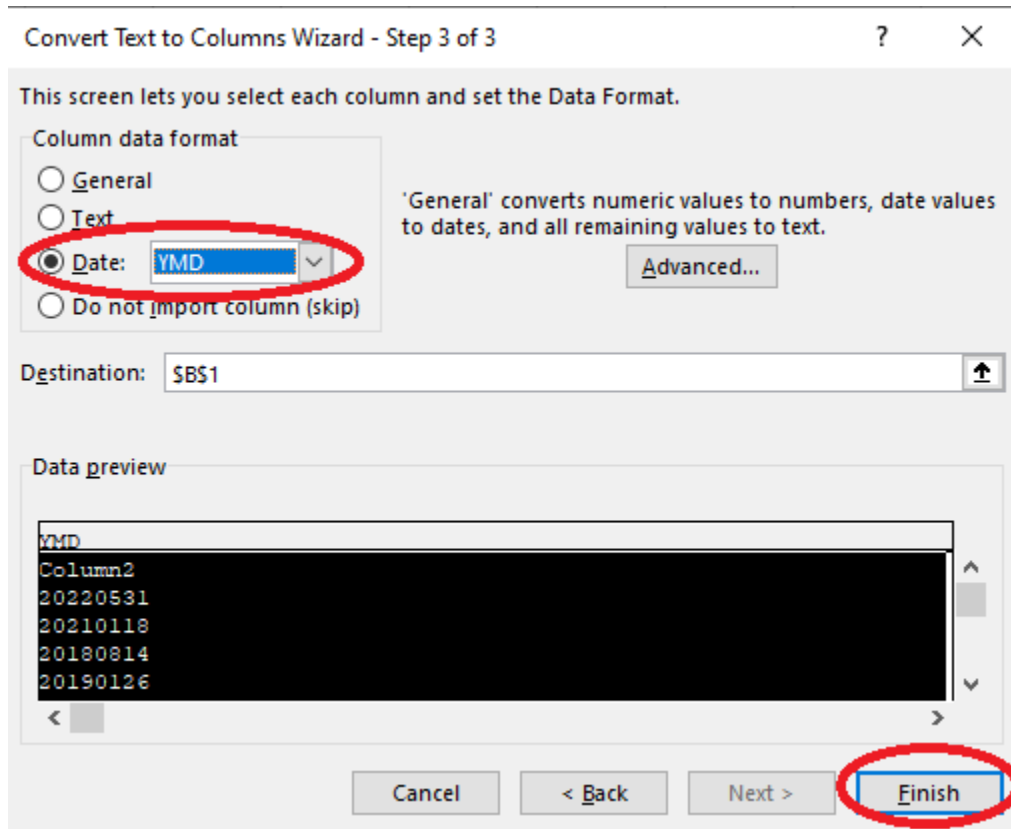
Text qualifier:

Data preview

Column2
20220531
20210118
20180814
20190126

Cancel < Back **Next >** Finish

Under Column data format select Date then from the drop down select YMD, Click Finish.



This will automatically change the entire column to the date format of mm/dd/yyyy.

## 2<sup>nd</sup> Option to change date (office 365)

Click in the first blank Column

	A	B	C	D	E
1	Column1	Column2	Column3	Column4	
2	0003900014154	20220531	AMAISD-FHE		
3	0011500391906	20210118	HIGHLAND		
4	0006000000791	20180814	AMAISD-LAN		
5	0000210208252	20190126	APL-NW		
6	127200405	20151110	AMAISD SOC		

Type the following formula =LEFT(B2,4) hit enter (B2 is where my text is that I want to convert, your column might be different)

	A	B	C	D
1	Column1	Column2	Column3	Column4
2	0003900014154	20220531	AMAISD-FHE	=LEFT(B2,4)
3	0011500391906	20210118	HIGHLAND	



Click in the next blank column and type the following formula =RIGHT(B2,2) hit enter

	A	B	C	D	E	F
1	Column1	Column2	Column3	Column4		
2	0003900014154	20220531	AMAISD-FHE	2022	=RIGHT(B2,2)	
3	0011500391906	20210118	HIGHLAND			
4	0006000000791	20180814	AMAISD-LAN			

Click in the next blank column and type the following formula =MID(B2,5,2) hit enter

	A	B	C	D	E	F	G
1	Column1	Column2	Column3	Column4	Column5		
2	0003900014154	20220531	AMAISD-FHE	2022	31	=MID(B2,5,2)	
3	0011500391906	20210118	HIGHLAND	2021	18		
4	0006000000791	20180814	AMAISD-LAN	2018	14		

Click in the next blank column and type the following formula =DATE(D2,F2,E2) hit enter. The formula is =DATE(year,month,day).

	A	B	C	D	E	F	G	H
1	Column1	Column2	Column3	Column4	Column5	Column6		
2	0003900014154	20220531	AMAISD-FHE	2022	31	05	=DATE(D2,F2,E2)	
3	0011500391906	20210118	HIGHLAND	2021	18	01		

Right click on the last column with the DATE formula and click on Format Cells  
Under Category select Date, Under Type select the format you want then click OK

Format Cells ? X

Number Alignment Font Border Fill Protection

Category:

- General
- Number
- Currency
- Accounting
- Date**
- Time
- Percentage
- Fraction
- Scientific
- Text
- Special
- Custom

Sample: Column7

Type:

- \*3/14/2012
- \*Wednesday, March 14, 2012
- 2012-03-14
- 3/14
- 3/14/12
- 03/14/12
- 14-Mar

Locale (location): English (United States)

Date formats display date and time serial numbers as date values. Date formats that begin with an asterisk (\*) respond to changes in regional date and time settings that are specified for the operating system. Formats without an asterisk are not affected by operating system settings.

OK Cancel

Your spreadsheet should look like the following.

	A	B	C	D	E	F	G	H
1	Column1	Column2	Column3	Column4	Column	Column	Column7	
2	0003900014154	20220531	AMAISD-FHE	2022	31	05	5/31/2022	
3	0011500391906	20210118	HIGHLAND	2021	18	01	1/18/2021	
4	0006000000791	20180814	AMAISD-LAN	2018	14	08	8/14/2018	
5	0000210208252	20190126	APL-NW	2019	26	01	1/26/2019	
6	127300406	20161110	AMAISD-SOG	2016	10	11	11/10/2016	
7	0003900046842	20220531	AMAISD-FHE	2022	31	05	5/31/2022	
8	0001300528906	20190205	FPC	2019	05	02	2/5/2019	
9	0000209369081	20050119	APL-NW	2005	19	01	1/19/2005	
10	0000208814079	20080215	APL-NW	2008	15	02	2/15/2008	
11	0000208814046	20070222	APL-NW	2007	22	02	2/22/2007	
12	0003200182776	20220524	AMAISD-AHS	2022	24	05	5/24/2022	
13	135100989	20170525	AMAISD-WOL	2017	25	05	5/25/2017	
14	0000211237995	20180129	APL-CENTRL	2018	29	01	1/29/2018	

Now you can rename your columns and sort as needed.

## Edit Excel for use with Word Mail Merge

You will need to either edit the excel spreadsheet or the Microsoft word document.

Edit the Excel document by rearranging the columns so the User Name, User ID, and Alt ID are at the front.

Highlight the 3 columns

A	D	C	D	E	F	G
Title	Call Number	Item ID	Date Due	User Name	User ID	User Alt ID
Customer service: a practical approach, 6th ed	ASP MRKG	0000101541530	08/12/2022	Albarran, Christian	AC0541266	-975684
Ti-84 plus graphing calculator	CALCULATOR	0000101865442	08/12/2022	Boukinda, Ramses	AC0613728	-981267
How full is your bucket?: positive strategies for work and life / Tom Rath and Donald O. Clif	658.314 R187	0000101821619	07/28/2022	Bryce, AUBREY HAMILTON	1001700373043	TX42011636
How management works : the concepts visually explained / consultant editor, Philippa And	658 AN545	0000101844975	07/28/2022	Bryce, AUBREY HAMILTON	1001700373043	TX42011636
The servant leader's manifesto / Omar L. Harris	658.4092 H313	0000101515583	07/28/2022	Bryce, AUBREY HAMILTON	1001700373043	TX42011636
Exploring Psychology 11th ed	ASP PSYC	0000101694974	08/12/2022	ESTRADA, VICTORIA SELENA	AC0549966	TX38889732

Right click at the top of the selected columns and click Cut

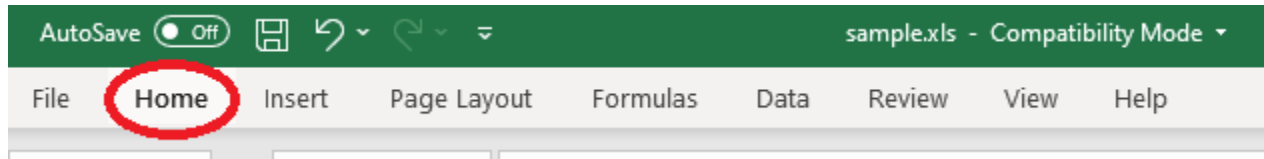
Right click at the top of Column A and click Insert cut cells

Select the duplicate users

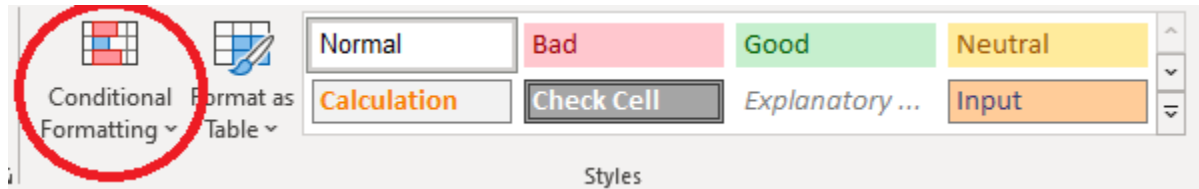
Highlight the first column that has the students name

A	B	C
User Name	User ID	User Alt ID
Albarran, Christian	AC0541266	-975684
Boukinda, Ramses	AC0613728	-981267
Bryce, AUBREY HAMILTON	1001700373043	TX42011636
Bryce, AUBREY HAMILTON	1001700373043	TX42011636
Bryce, AUBREY HAMILTON	1001700373043	TX42011636
ESTRADA, VICTORIA SELENA	AC0549966	TX38889732
Folks, Jessica Michelle	AC0661779	25355433
GOODWIN, CHELSEA BROOKE	1000600542830	TX08396592
HERNANDEZ, MARIBEL FERMAINT	1001700254490	TX26521281

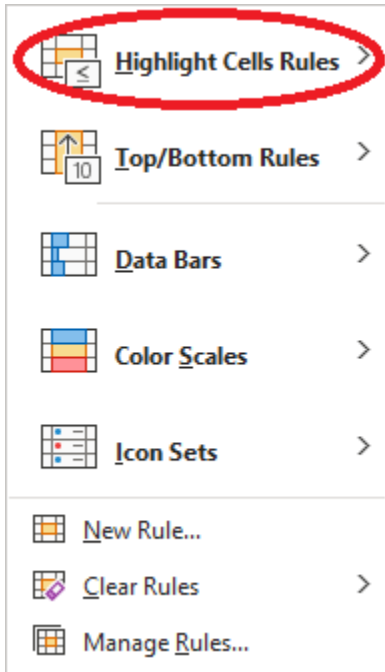
Click on Home



Select Conditional Formatting under Styles

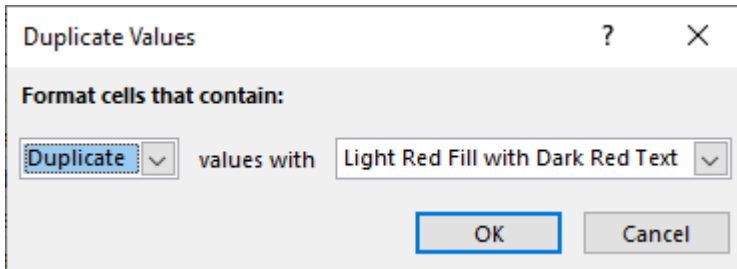


## Select Highlight Cells Rules



## Select Duplicate Values

Choose a color to highlight them



Click OK.

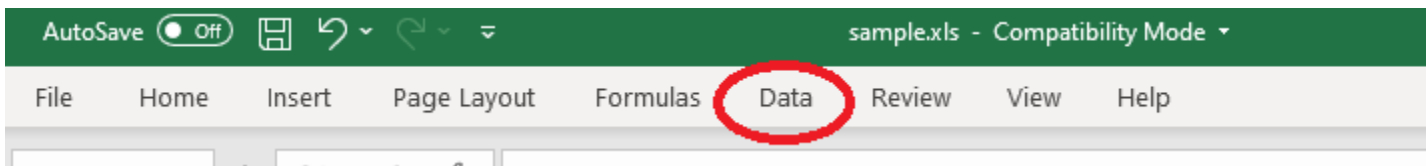
Now your students that have more than one item will be highlighted, cut the multiple titles, call numbers, item ids, and date dues and put at the end of the first row for each duplicate student.

Add a column heading to the columns you just created (Title 2, Call Number 2, Item ID 2, Date Due 2, etc.)

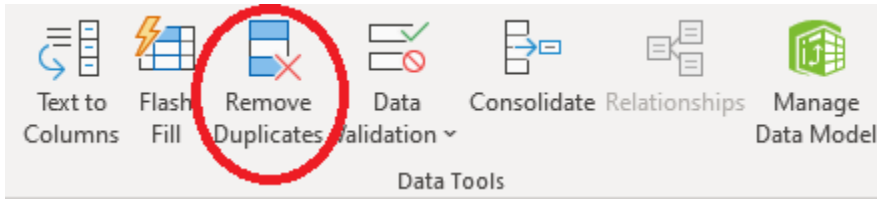
When you are done you can remove the duplicate student rows

Highlight the User Name Column

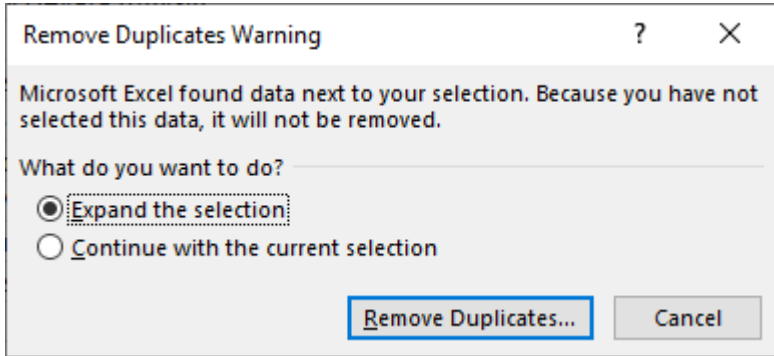
Click on the Data tab



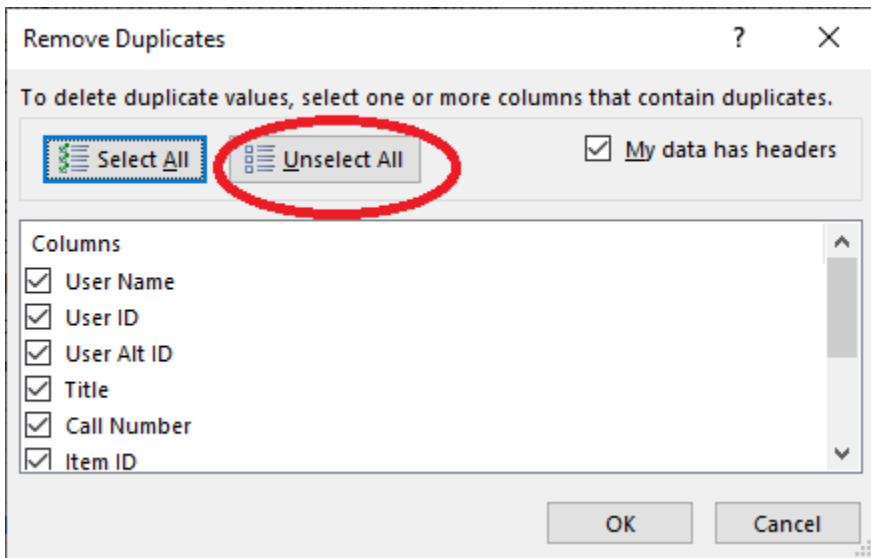
Click Remove Duplicates under Data Tools



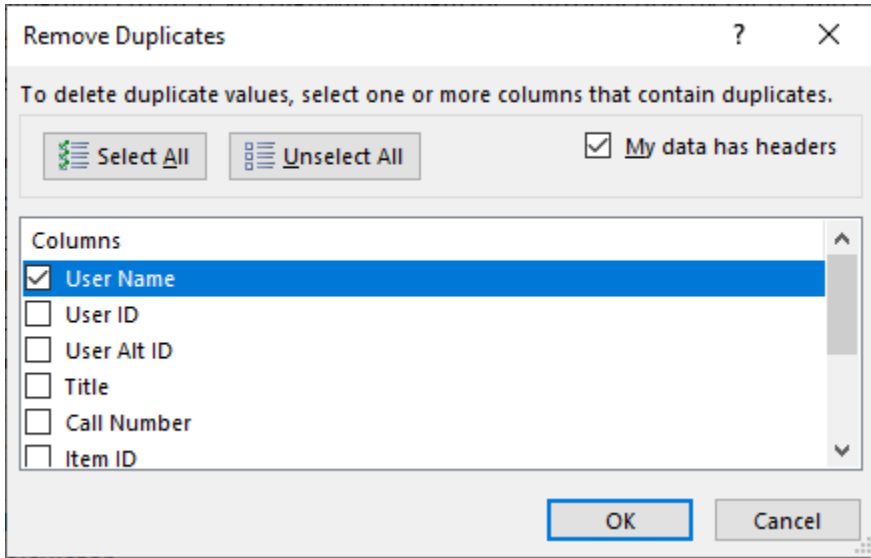
Click Expand Selection, then click Remove Duplicates button



Click Unselect All



Select the User Name, Click OK

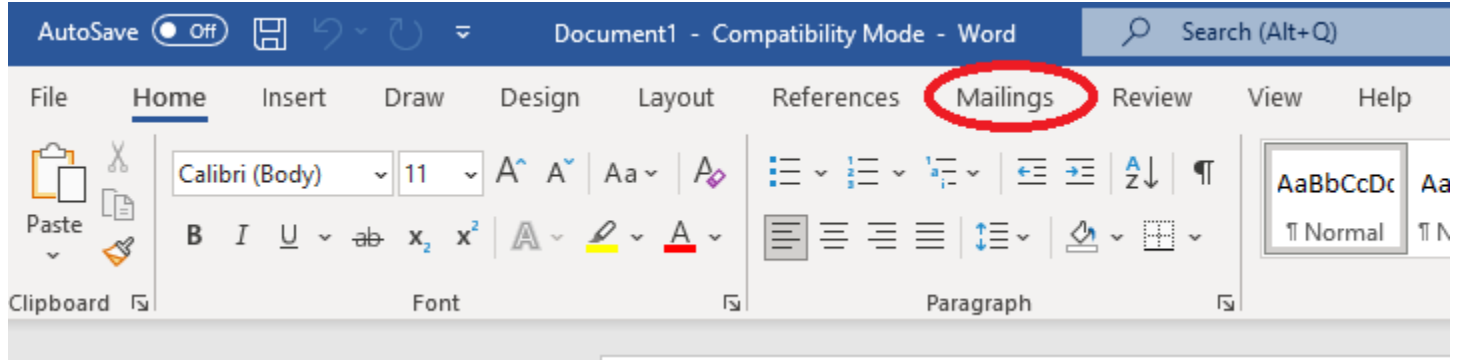


Now save your spreadsheet where you can find it so you can do the mail merge.

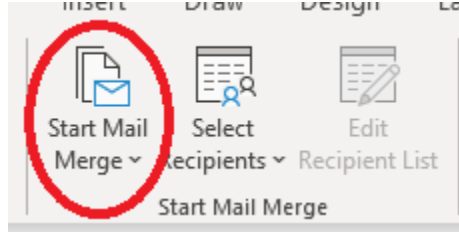
# Creating a Mail Merge in Word

Open Microsoft Word

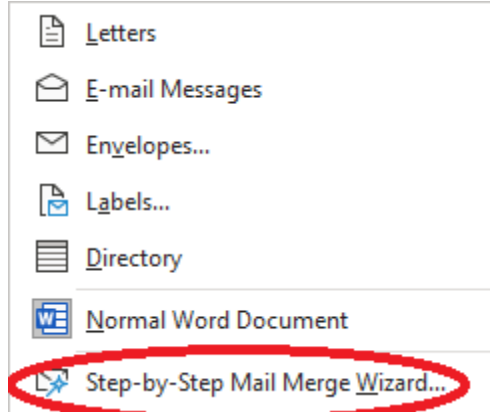
Click on Mailings



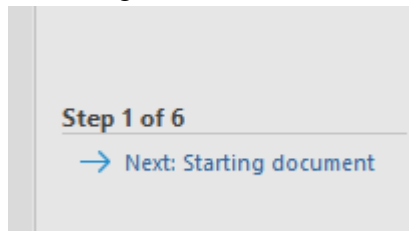
Click Start Mail Merge under Start Mail Merge



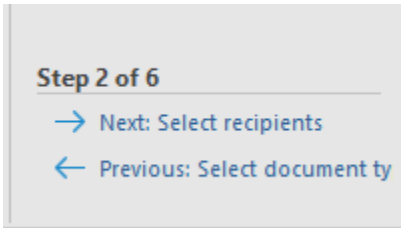
Click Step-by-Step mail Merge Wizard



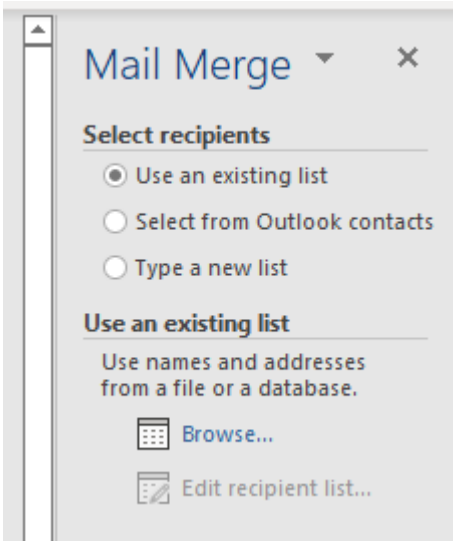
Lower right side click Next Starting Document



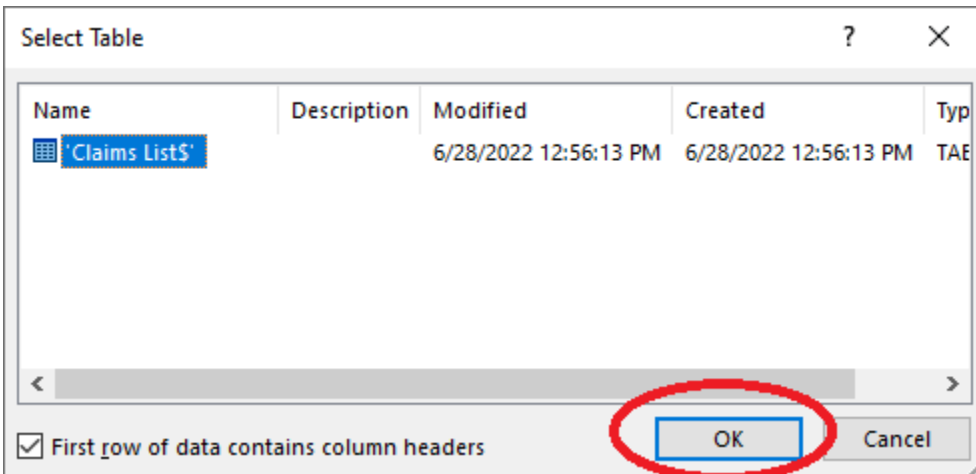
Click Next Select Recipients



In the right side select Use an existing list, click Browse and browse to your excel file



Click OK





Click OK

Mail Merge Recipients

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	<input checked="" type="checkbox"/>	Title	Call Number	Item ID	Date Due
sample.xls	<input checked="" type="checkbox"/>	Customer service: a pra...	ASP MRKG	0000101541530	08/12/2022
sample.xls	<input checked="" type="checkbox"/>	TI-84 plus graphing cal...	CALCULATOR	0000101865442	08/12/2022
sample.xls	<input checked="" type="checkbox"/>	How full is your bucket...	658.314 R187	0000101821619	07/28/2022
sample.xls	<input checked="" type="checkbox"/>	How management wor...	658 AN545	0000101844975	07/28/2022
sample.xls	<input checked="" type="checkbox"/>	The servant leader's ma...	658.4092 H313	0000101515583	07/28/2022
sample.xls	<input checked="" type="checkbox"/>	Exploring Psychology 1...	ASP PSYC	0000101694974	08/12/2022
sample.xls	<input checked="" type="checkbox"/>	Think Social Psychology	ASP PSYC	0000101523595	08/12/2022
sample.xls	<input checked="" type="checkbox"/>	The seven husbands of ...	FIC REID	0000101523280	07/19/2022

Data Source: sample.xls

Refine recipient list

- [Sort...](#)
- [Filter...](#)
- [Find duplicates...](#)
- [Find recipient...](#)
- [Validate addresses...](#)

Edit... Refresh

**OK**

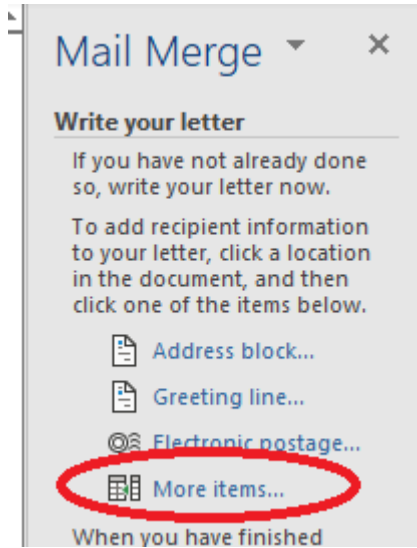
Lower right side click Next Write your letters

Step 3 of 6

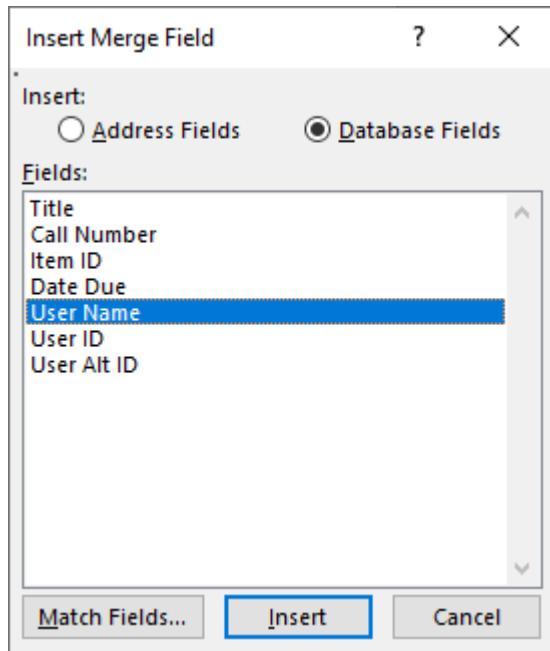
→ Next: Write your letter

← Previous: Starting document

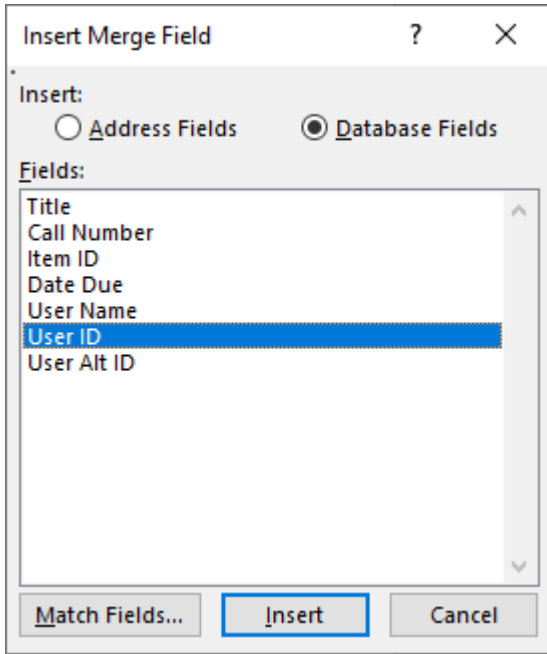
If you want the User name, User ID and User ALT ID at the top then you  
Click on More Items in the upper right side



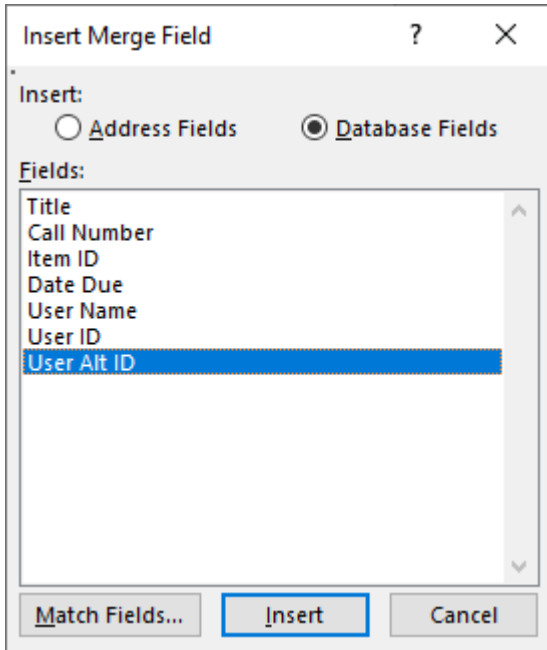
Highlight User Name, Click Insert, Click Close, Click Shift +Enter (for a single return)



Click More Items, Highlight User ID, Click Insert, Click Close, Click Shift +Enter (for a single return)



Click More Items, Highlight User Alt ID, Click Insert, Click Close, Click Shift +Enter (for a single return)

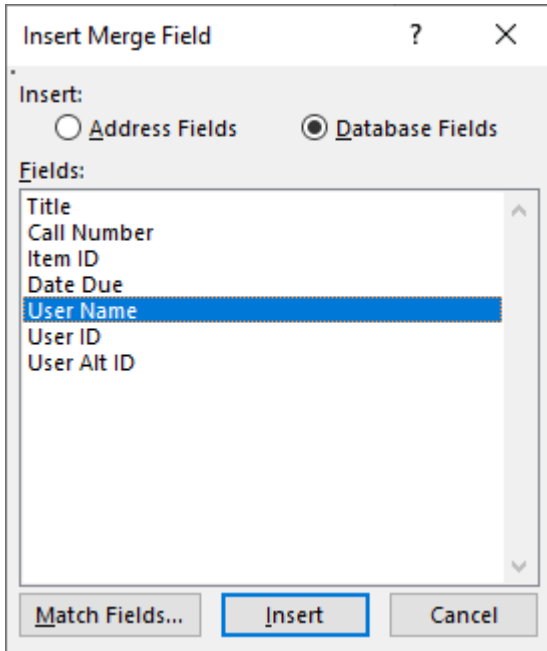


Click Cancel

You may need to put spaces or returns between the fields

Add a salutation Type Dear then add the User Name.

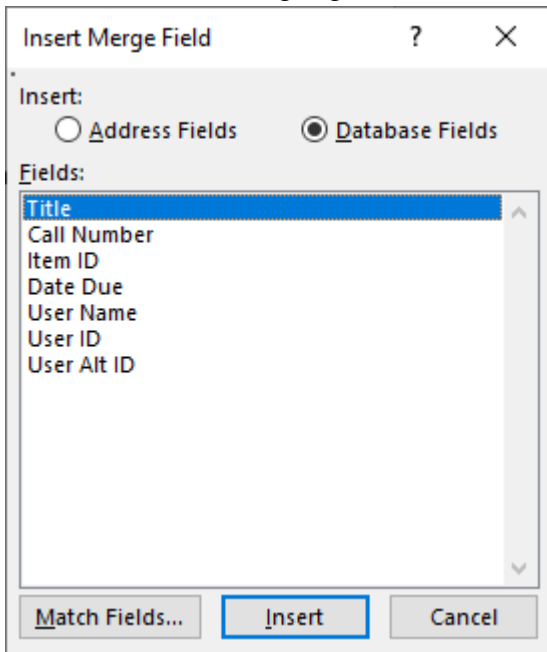
Click More Items, Highlight User Name, Click Insert, Click Close, Click Shift +Enter (for a single return)



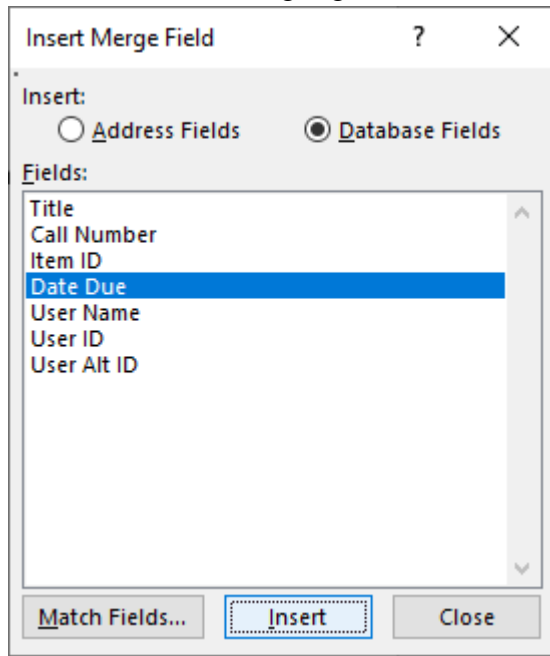
Type the body of your letter.

Now you will put the titles and item ids, etc in the letter

Click More Items, Highlight Title, Click Inset, Click Close, Click Shift +Enter (for a single return)



Click More Items, Highlight Date Due, Click Insert, Click Close, Click Shift +Enter (for a single return)



You can add more fields if you wish.

Add a Closing Salutation

Your letter might look like this

«User\_Name»  
«User\_ID»  
«User\_Alt\_ID»

Dear «User\_Name»,

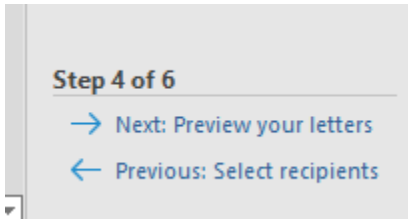
The following item(s) are overdue. Please make arrangements to return/renew your item(s) as soon as possible.

«Title»  
«Date\_Due»

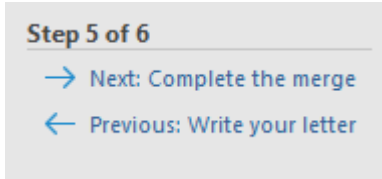
Sincerely,

Librarian  
806-378-6037

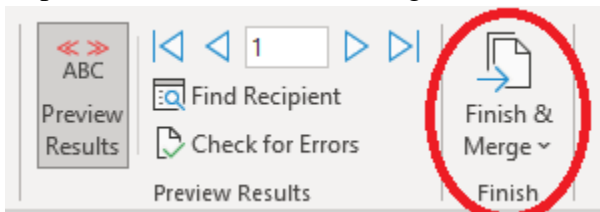
Click Next preview your letters in the lower right corner



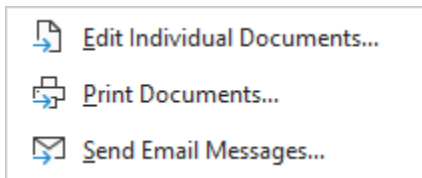
Click Next complete the mail merge in the lower right corner



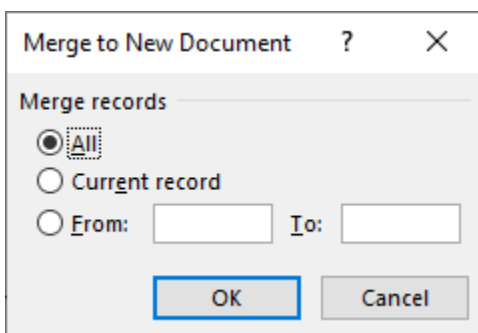
Top ribbon Click Finish & Merge under Finish



Click Edit Individual Documents



Select All, click Ok



Another Document will open with your letters in them. From this document you can save or print the letters you just created. Close that document, then save your Mail Merge Document for later use.

## How to remove everything but duplicate rows in Excel (office 365)

To remove the non-duplicate rows, you need to create a formula helper column first, and then filter all the unique values based on your helper column, finally delete the filtered unique values.

1. Enter this formula `=COUNTIF($A$2:$A$15,A2)=1` into a blank cell beside your data. (\$15 represents the last cell with data in it, yours might be 100 or 1000)
2. Then drag the fill handle down to the cells that you want to apply this formula, **False** indicates the duplicate values and **True** stands for the unique values.
3. Then select the data range and click **Data > Filter**.
4. Click the filter drop-down in the new helper column and uncheck **FALSE** option to just show the unique values of column A, and then click **OK**.
5. After showing only the non-duplicate records, select the entire rows of these visible rows, and then click **Home > Find & Select > Go To Special**, in the **Go To Special** dialog box, select **Visible cells only** option.
6. Then click **OK** to close the dialog box, and only the visible rows have been selected.
7. Then you need to remove these visible rows only, put the cursor at the selected rows, right click to choose **Delete Row** from the context menu.
8. Only the visible rows are deleted at once, then you need to cancel the filter by clicking **Data > Filter** again to disable the **Filter** function, and you can see all the unique value rows have been removed, and only leave the duplicate records.
9. You can delete the contents of the helper column if you want.