



# eScholar<sup>®</sup>

Bringing Data Together

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## **Guide to Importing Data in Microsoft Excel<sup>®</sup>**

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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

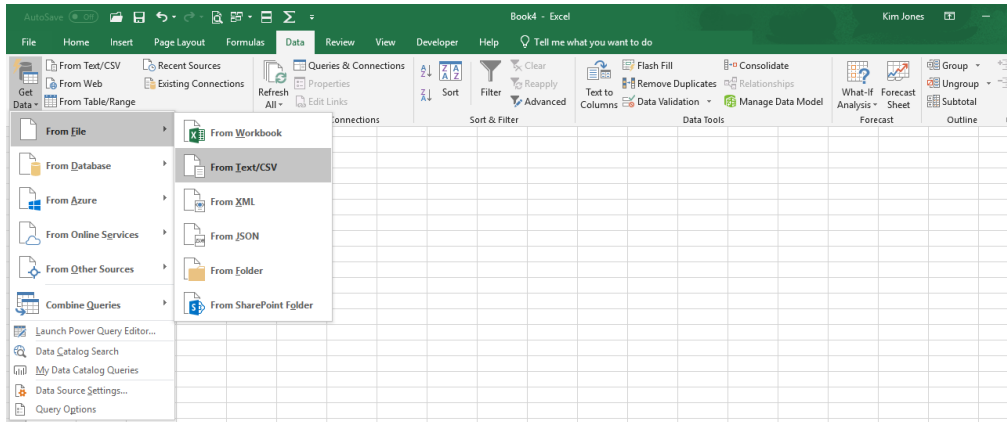
Where there are differences between versions in the instructions and/or screen shots, the specific version(s) that apply are noted. If the version of Excel is not noted, then the instructions and/or screen shots apply to all versions.

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.

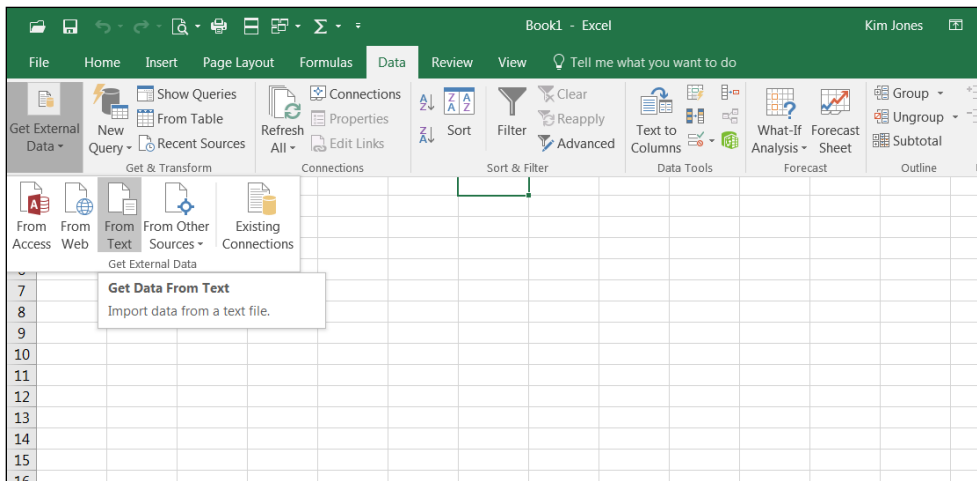
Therefore, in order to preserve the integrity of the data, it is critical to import the file into Excel. This is best accomplished using the Data Import Wizard, which preserves the text formatting of your file. By using this wizard, external data can be imported and the original formatting is unchanged.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

## IMPORTING DATA INTO EXCEL AS TEXT

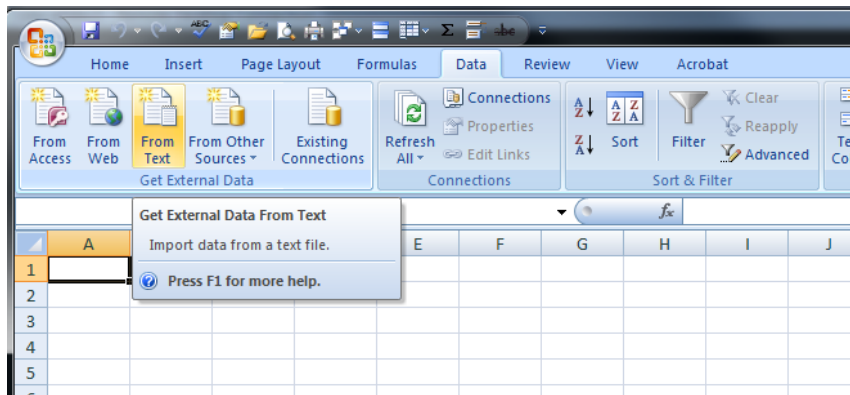
For Excel 2019 - Select Data → Get Data → From File → From Text/CSV



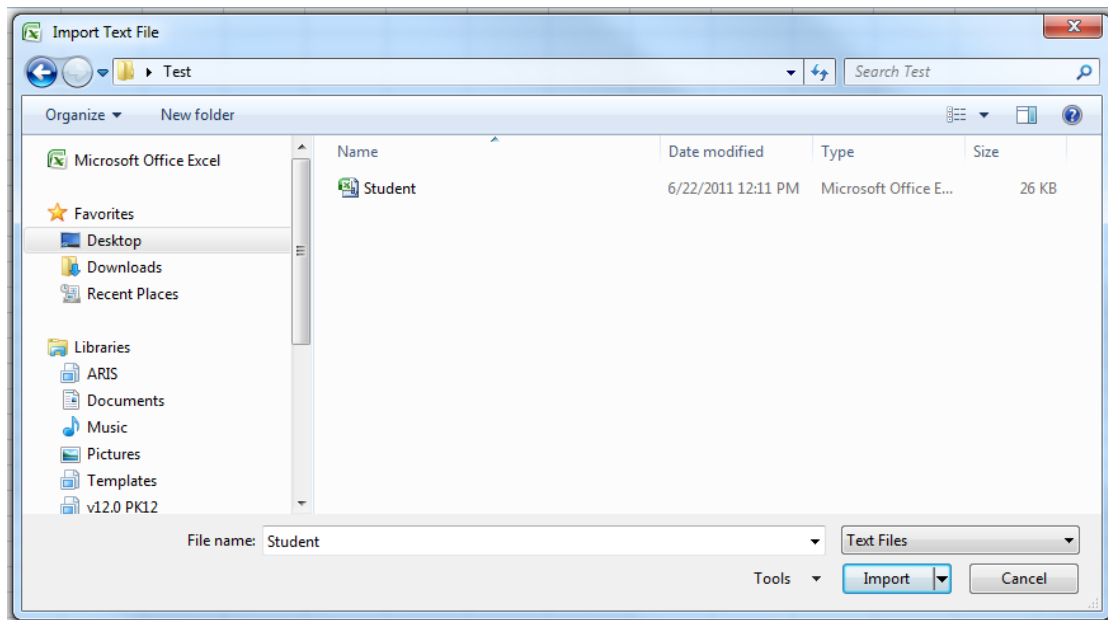
For *Excel 2013* and *Excel 2016* - Select Data → Get External Data → From Text



For *Excel 2010* - Select Data → From Text



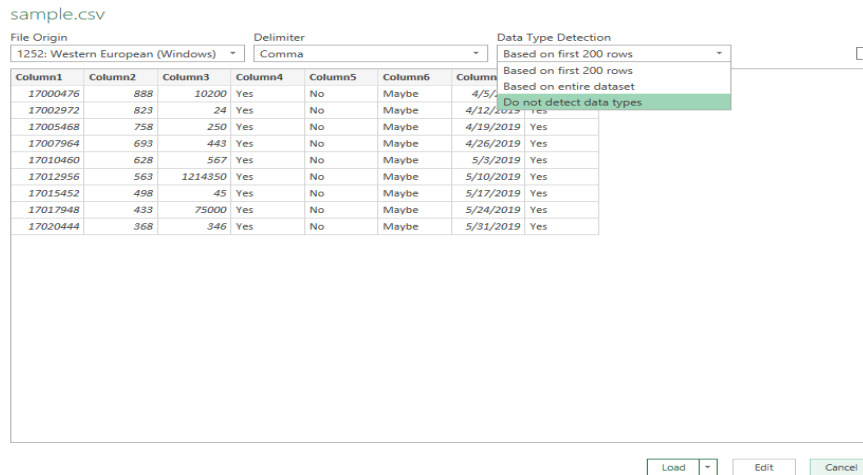
The *Import Text File* pop up window displays. Locate and select the file to import and click **IMPORT**.



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

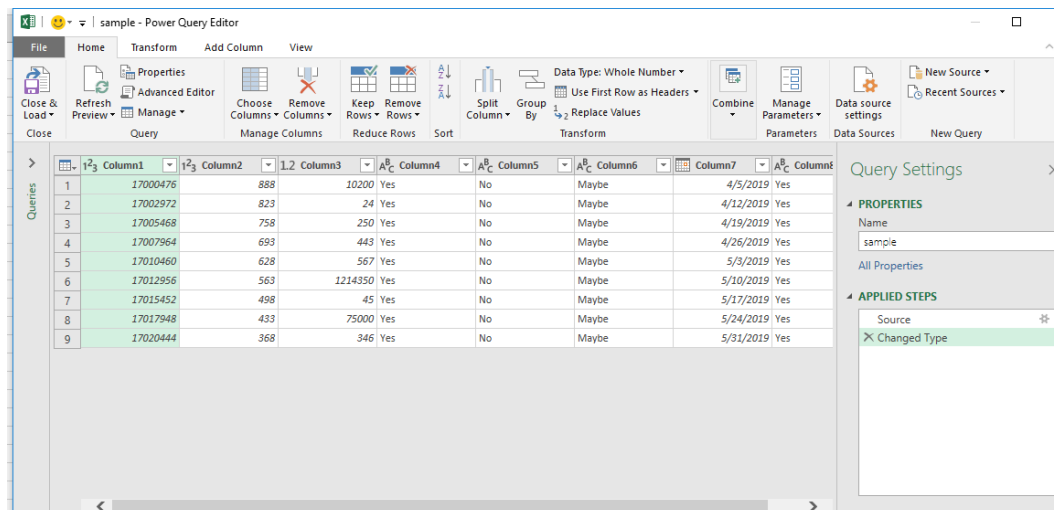
Import Wizard with Excel 2019

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.

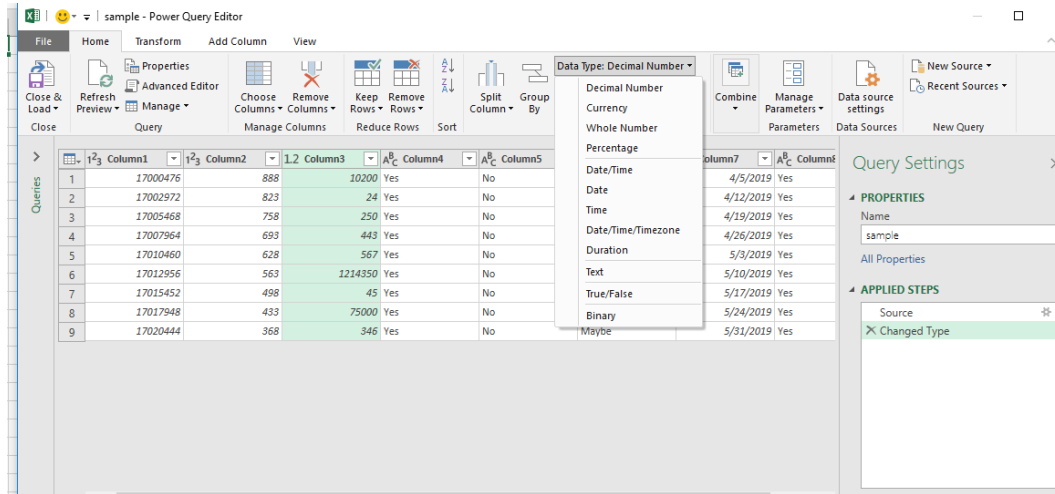


If you want to manually define the column data types select **DO NOT DETECT DATA TYPES** from the drop down then click **EDIT**.

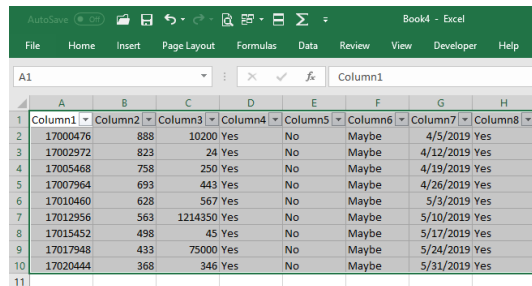
The Query Editor Window will open.



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.

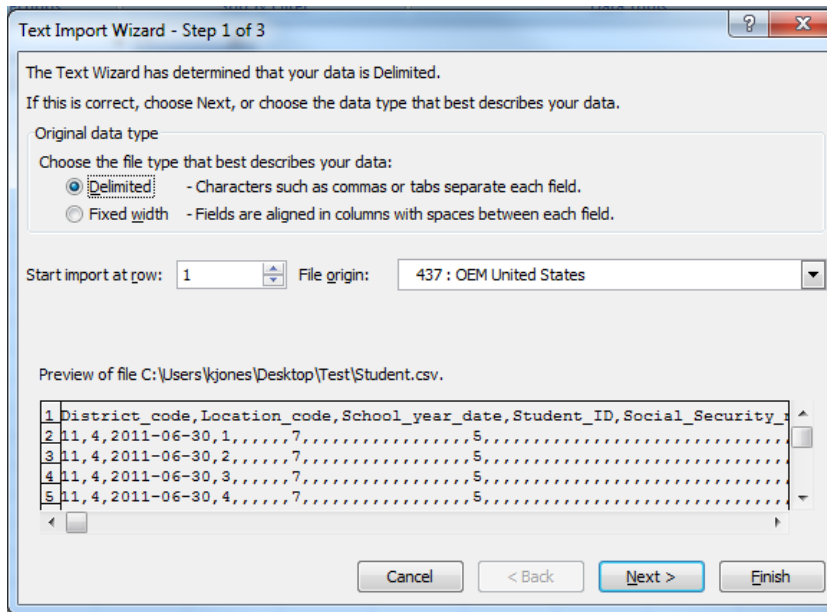


Once this has been done for each column click on Close & Load.



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

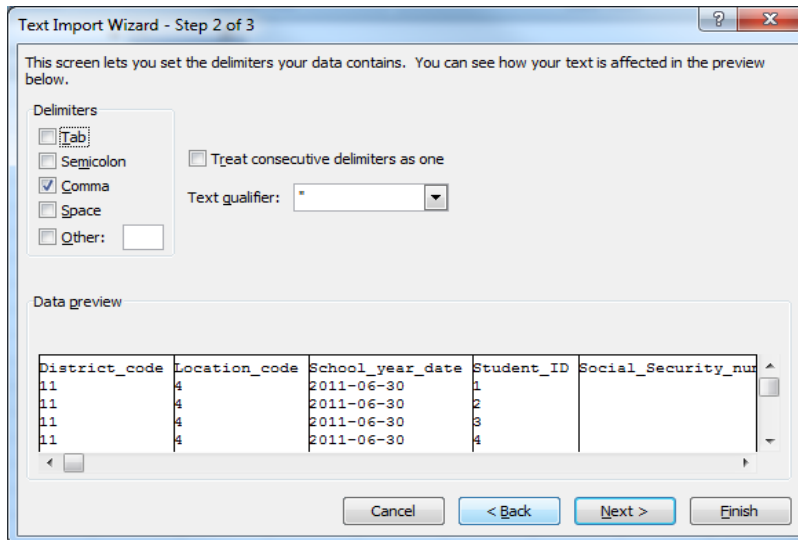
The *Text Import Wizard* pop up window displays.



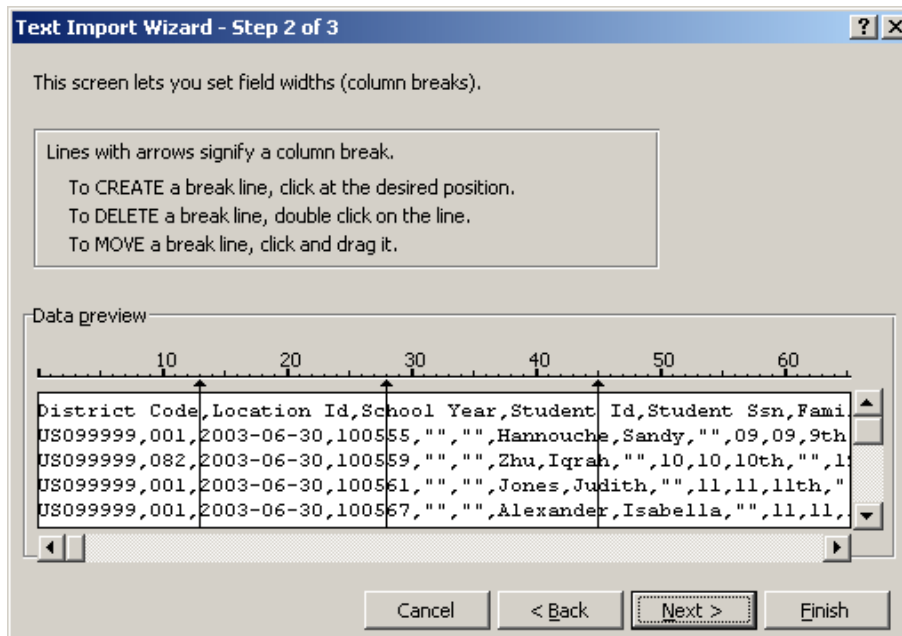
**TIP:** Use this screen to define the file characteristics (delimited or fixed width). In the example above, the data type is **Delimited**.

**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.



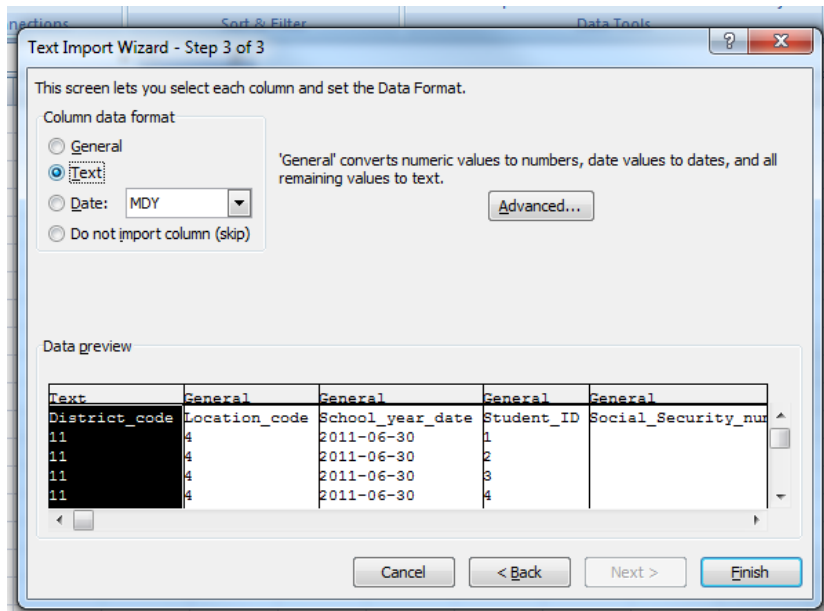
**NOTE:** This is an illustration of the second step of the wizard for a Delimited file type. This particular file is defined as a **COMMA DELIMITED** file. To change the selected **DELIMITER**, click the value of **DELIMITER** used to separate the fields in your file.





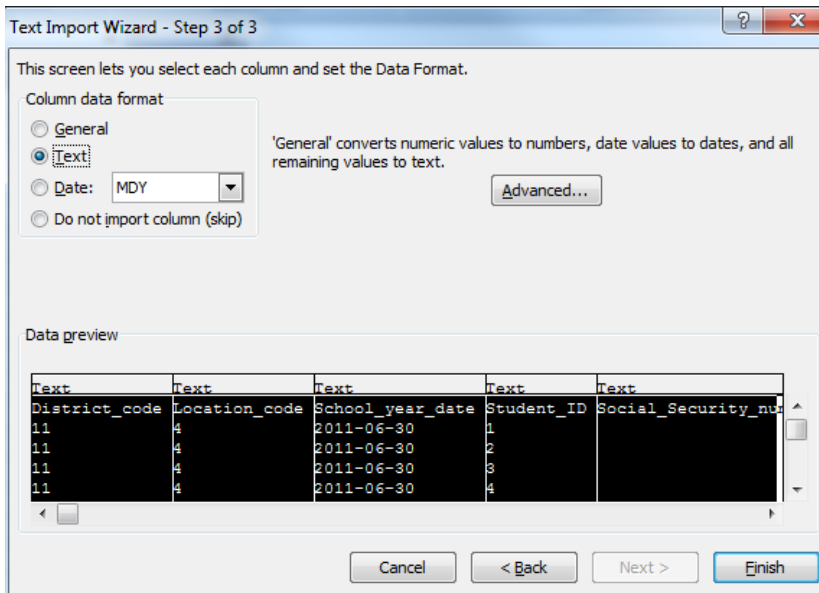
**NOTE:** This is an illustration of the second step of the *Data Import Wizard* when you are importing a **FIXED WIDTH** data file. The lines with arrows in the **Data Preview** indicate a column break.

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



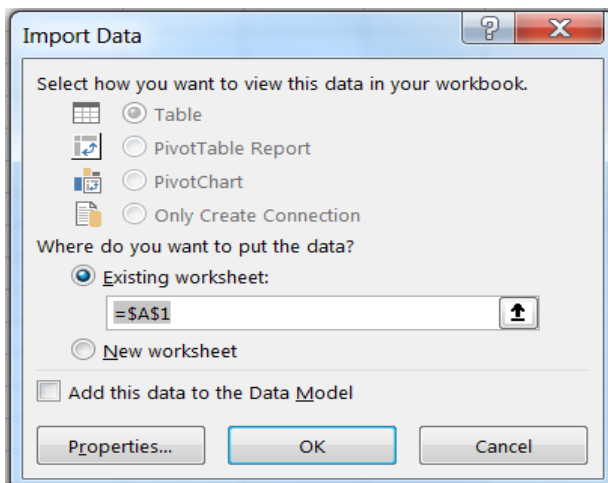
**NOTE:** This is an illustration of the third step of the *Data Import Wizard*. Regardless of the **Data Type** of your file, it is **critical** to select **TEXT** as the **COLUMN DATA FORMAT**. This preserves the formatting of numeric values in your file.

**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.

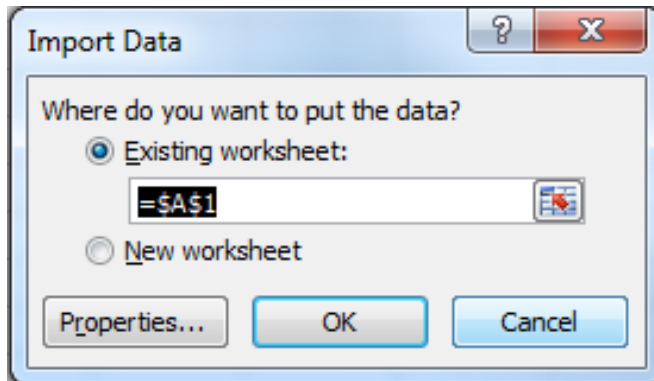


Click **FINISH**. The *Import Data* pop up window displays.

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



(**Import Data** pop up window in Excel 2010)

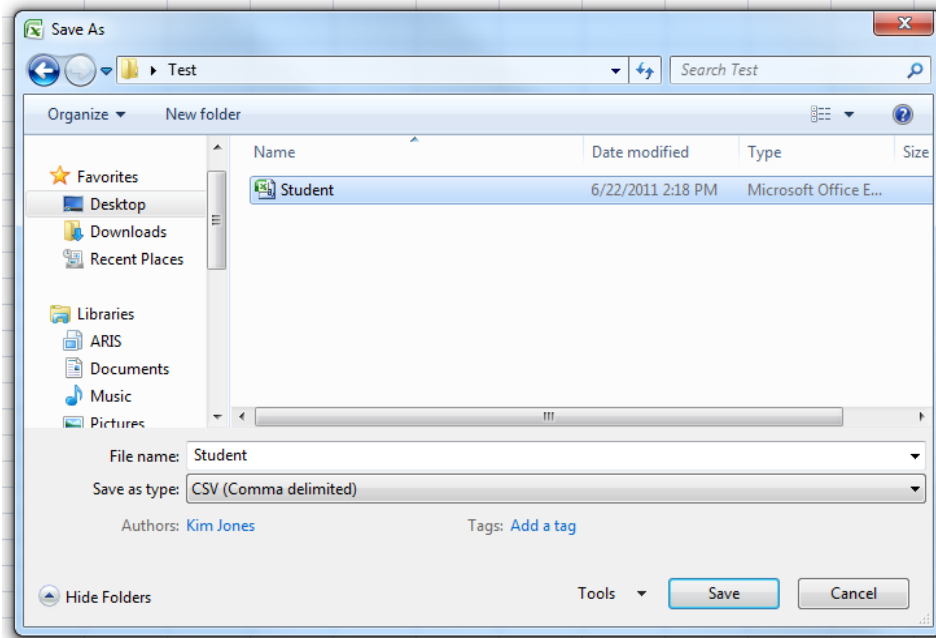


Select **EXISTING WORKSHEET** to return the data to the spreadsheet in which you started. Click **OK**. An Excel spreadsheet displays with the imported data.

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. The ribbon includes options for 'Get External Data', 'Connections', and 'Sort & Filter'. The active cell is E5. The data table below is as follows:

	A	B	C	D	E	F	G
1	District_code	Location_code	School_year_date	Student_ID	Social_Security_number	FamilyNumber	Last_Nam
2	11	4	2011-06-30	1			
3	11	4	2011-06-30	2			
4	11	4	2011-06-30	3			
5	11	4	2011-06-30	4			
6	11	4	2011-06-30	5			
7	11	4	2011-06-30	6			
8	11	4	2011-06-30	7			
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			
14	11	4	2011-06-30	13			
15	11	4	2011-06-30	14			

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.