



Data Review

As you transition to the Manage User Access page, you will need to verify that your data is consistent across all applications. This process will simulate the merging of all data and identify situations where your attention is required.

The criteria to merge records is: Last Name + Email Address (or Last Name + ID, if the Email is different).

Note, you need to update all ACTIVE/GRANTED users. INACTIVE/NOT GRANTED users are optional.

Actions denoted with an asterisk (*) are highlighted at the end in the **Excel Helpful Hints** section.

STEP ONE: PREPARING THE DATA

- From the Manage User Access page, click on **Options**.
- Click **Download Merge Preview**.
- Select all applications and click **Download CSV**.
- Expand all columns.
- Click **View > Freeze Panes > Freeze Top Row***. This will allow you to scroll down the spreadsheet without losing the Header Row.
- Insert a new Column at Column A.
- Use Function **Concatenate*** for Last Name and First Name (i.e. DoeJane). Copy down for all rows. This will be your new Column A.
- Highlight Column A. Click **Home > Conditional Formatting > Highlight Cell Rules > Duplicate Values***. (This will highlight all duplicate users.)
- Highlight Column D (Org_Email). Click **Home > Conditional Formatting > Highlight Cell Rules > Duplicate Values***. (This will highlight all duplicate emails.)

STEP TWO: FIND DUPLICATE USERS

Duplicate users identify situations where you have different email addresses.

To fix: go directly to the Application record and make the appropriate adjustment.

- Highlight the entire worksheet.
- Click **Data > Sort***.
- Select Sort By = org_lastNameorg_firstName (Column A).
- Click **OK**.
- Highlight the entire worksheet, again.

- Click **Data > Filter**.
- Click the Filter dropdown option for Column A. Select **Filter by Color > Filter by Cell Color** and select the red color. (If the Filter by Color option is grayed out, then you do not have any duplicate situations.)
- Find all email addresses which need updating.
- Click on the cell containing the incorrect email and hit CTRL + ➤ (right arrow key) to quickly jump past empty cells. Eventually, you will land on the Last Name of the user.
- Look to the Column Header, and you will see which application stores the record.
- Go to that application and make the appropriate change.
- Click CTRL + ⬅ (Left arrow key) to return.
- Repeat steps for next user.

Once you are done Duplicate Users, please reset the spreadsheet by highlighting the worksheet and unclicking the **Data > Filter** option. You are now ready for Step Three.

STEP THREE: FIND DUPLICATE EMAILS

Duplicate emails identify situations where you have potentially different users with the same email address. Here are the typical situations: Maiden-to-Married or mismatched Last Name suffixes (Smith vs. Smith II). *You can disregard mismatched First Names if it is the same person (Robert vs. Bob).*

To fix: go directly to the Application record and make the appropriate adjustment.

- Highlight the entire worksheet.
- Click **Data > Sort***.
- Select Sort By = **org_email** (Column D).
- Click **OK**.
- Highlight the entire worksheet, again.
- Click **Data > Filter**.
- Click the Filter dropdown option for Column D (org_email). Select **Filter by Color > Filter by Cell Color*** and select the red color. (If the Filter by Color option is grayed out, then you do not have any duplicate situations).
- Find the users will differing Last Names.
- Click on the cell containing the incorrect Name and hit CTRL + ➤ (right arrow key) to quickly jump past empty cells. Eventually, you will land on the Last Name of the user.
- Look to the Column Header and you will see which application stores the record.
- Go to that application and make the appropriate change. The Last Name must be an exact match.
- Click CTRL + ⬅ (Left arrow key) to return.

Repeat steps for next user.

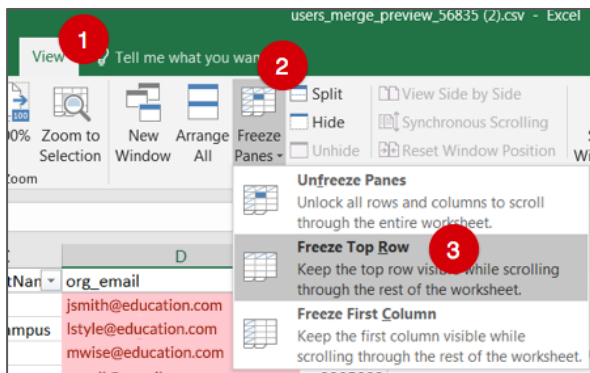


Excel Helpful Hints

FREEZE TOP ROW

Please complete the following steps to freeze the top row:

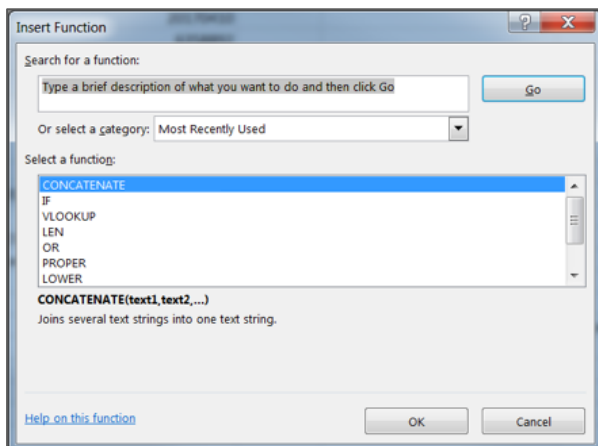
- Select the **View** tab.
- Click **Freeze Panes**.
- Select **Freeze Top Row**.



FUNCTION: CONCATENATE

The concatenate function links cells together in a chain or series. Please complete the following steps to utilize the “Concatenate” function.

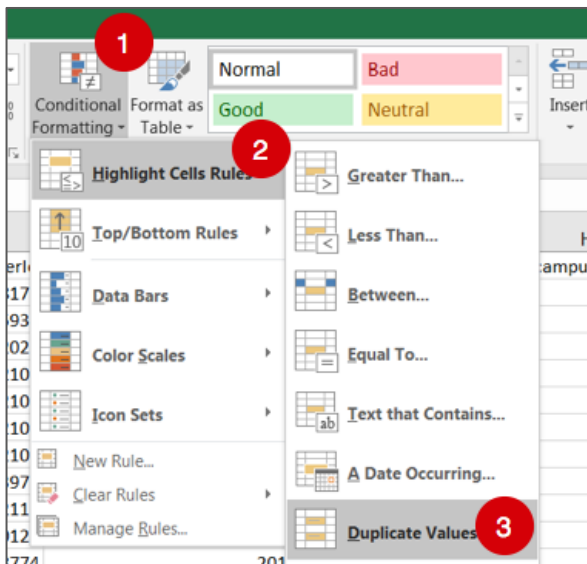
- Select the cell where you want to enter the formula.
- Type “=CONCATENATE” in the cell or formula bar.
- Press and hold **Ctrl** (for Windows) or **Command** (for Mac) and click on each cell you want to concatenate.
- Release the Ctrl/Command button, type the closing parenthesis in the formula bar, and press **Enter**.



DUPLICATE VALUES

Please complete the following steps to duplicate values:

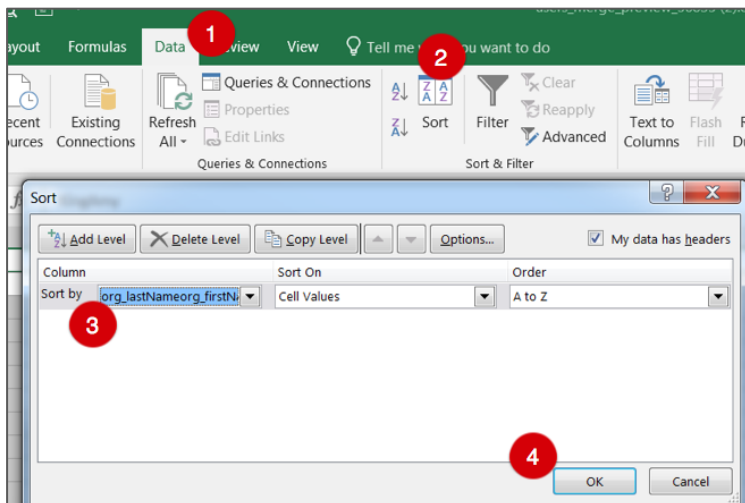
- Select **Conditional Formatting** from your Excel formatting options.
- Click **Highlight Cells Rules**.
- Click **Duplicate Values**.



DATE SOURCING

Please complete the following steps to utilizing date sourcing:

- Select the **Data** tab in Excel.
- Click the **Sort** option.
- Sort the data by the desired column, "sort on" option, and order.
- Click **OK**.



FILTER BY COLOR

Please complete the following steps to filter by a specific color:

- Select the dropdown beside a column's cell.
- Click **Filter by Color**.
- Choose the color you wish to use.

