

# MERGE MACRO INSTRUCTIONS

[Nick Peterson](#) from the Oregon Health & Science Library developed this EXCEL MERGE MACRO and [Diane Carroll](#) from WSU Libraries developed the procedures for using it. Nick's Macro is designed to match data from two worksheets and to merge the information on the correct row on the Master worksheet.

The Merge Macro is located at [WSU Research Exchange \(Institutional Repository\)](#)

## Directions

Example: Two worksheets contain the unique identifier or matching point (ISSN, bibliographic, checkin or order record number, titles in identical format, etc) and data from both worksheet needs to be merged onto the same row on one worksheet. In these directions, we will be matching on ISSN and merging use data to the Master worksheet.

- Prepare data to be merge
  - The Master worksheet is the worksheet that will receive data from a Contributing data worksheet
  - Both the Master worksheet and the Contributing data worksheet must be located in the same spreadsheet. Copy the Contributing data worksheet into the same spreadsheet that contains the Master worksheet.
  - Name the worksheets Master and Contributing
  - Sort the matching points on both worksheets. I will use ISSN for this example.
  - If data is not clean, for example, if there are trailing spaces at the beginning or end of the ISSN, the Merge Macro will not match them.
    - To clean the data, insert a column next to the ISSN and type the following into the first cell of the column:
      - =Trim(cell with first ISSN)
      - Drag the formula down the column. Highlight the clean data column. Edit Copy. Edit Paste Special. Click on Value. Delete the original data column.
  - All duplicate ISSN must be removed and merged by hand for both the MASTER and Contributing data worksheets.
    - To locate duplicates, copy the ISSN to another worksheet. Sort. Highlight the column.
    - Insert the label ISSN to the first cell in the column if needed.
    - Data - Subtotals - At each change in ISSN; Use function COUNT; Add Subtotal to ISSN. Check boxes: Replace current subtotals and Summary below data. Click Okay.
    - Look to the left of the screen and click the little box that says 2.
    - Add autofilters to row 1 (DATA-Filters-Autofilter)
    - Review all ISSN that have 2 or more hits and modify spreadsheets so these are eliminated before using the MERGE MACRO. If you don't you will double post information and get errors.

- Create a new column on the Master worksheet labeled Use data. It is assumed there is a column on the contributing worksheet called "use data"
- Create a new column on the Contributing worksheet labeled Match?
  
- Prepare Merge Macro
  - Open the spreadsheet with the two worksheets containing data to be merged.
  - Merge Macro is located at [WSU Research Exchange \(Institutional Repository\)](#)
  - The first time you use this, you may have to change the security setting on EXCEL. Tools - Options -Security - Look for box that says Macro Security. Try Medium or Low.
  - Click on Launch Merge Data
  - Select the spreadsheet containing the two worksheets to be merged
  - Worksheet A = Master; Worksheet B = Contributing
  - Select Match. Match Column Worksheet A = ISSN; Match column Worksheet B = ISSN
  - If there is a match, copy column Use data from Worksheet B (Contributing data worksheet) to column "Use data" on Worksheet A (Master worksheet)
  - I usually don't overwrite.
  - Click Merge
  - Go to Master worksheet and confirm that the correct matches were made.
  
- Prepare backward merge
  - Sometimes depending on how clean the data is, some merges will not be made. Regardless, you may still need to merge the titles, ISSN and data from the contributing worksheet to the Master worksheet. To do this, you have to know which rows merged and which did not.
  - I do a backward merge so that I can autofilter on the titles that did not merge and add them to the Master worksheet.
  - Click on Launch Merge Data
  - Select the spreadsheet containing the two worksheets to be merged
  - Worksheet A = Contributing; Worksheet B = Master
  - Select Match. Match Column Worksheet A = ISSN; Match column Worksheet B = ISSN
  - If there is a match, copy column Use data from Worksheet A (Master worksheet) to column "Match?" on Worksheet B (Contributing worksheet)
  - I usually don't overwrite.
  - Click Merge
  - If no data populates the "Match?" column, you know that data was not merged onto the Master and you may need to add by hand.