Preparing the data for the Wizard

1. Open the EXCEL spreadsheet “WSU Wizard for standardizing Innovative titles.xls” written by Cindy Ellis of Systems unit at Washington State University.
2. Enable Macro on EXCEL.
3. The first time this is run, use the test data provided to see how this works. Then clear the text on the worksheet “orig” for your run.
4. Copy the data generated by the search of order records on Innovative Interface ILS and paste it on the “orig” spreadsheet (Title (245) to be in Column A, 022 in Column B, Record # in Column C, Fund in Column D, and the first Amt Paid in Column E including all of the columns that have dollars posted.)
   - To find how far out the columns go, turn on the autofilters. The last column with a filter arrow is the end of the data.
   - Then clean up columns by deleting anything in the payments that is not a cost.

NOTE: The macros are written for the Title (245) to be in Column A, 022 in Column B, Record # in Column C, Fund in Column D, and the first Amt Paid in Column E (Amt Pd columns can extend out to and including O and still be added in correctly). If data is found in columns P and beyond, sum the columns starting with "O" and enter the sum into column "O".

NOTE: If your imported file (above) does not meet this format at the beginning of the Wizard, none of the macros will work correctly. The placement of the columns will change as the macros are used.

NOTE: Do not change the tab names for orig, Wiz, or delete the "blank" worksheet. You can add new tabs either before or after any of these tabs, just do not change the tab names.

Using the Wizard

1. Go to the Wiz worksheet; double-click on the figure of the Wizard.
2. Click on the “orig” worksheet before starting the Wizard.
3. Click on every box on the Wizard before moving to the Next page.
4. Transfer the Wizafied data on the “orig” worksheet to the serials decision database.
5. Merge ISSN in column C, D and E into Column C – or delete them. Delete Column C, D and E after removing the ISSN.

See WSU SDD wiki at http://wiki.wsu.edu/wsuwiki/SERIALS_DECISION_DATABASE for most up to date information on creating a serials decision database.