



# **Standard Operating Procedures for Slate: Cleaning Data to be Imported**

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# Resource List for Cleaning Data

<b>Resource Name</b>	<b>Details</b>
<b>Uploads Template for Import</b>	This template is the required format to submit clean data to the RDI Slate contact for review.
<b>Formatting Samples of Clean Data in Slate Excel Document</b>	This file shows a sample of original data, dirty data, and clean data. Each row will highlight issues or errors when attempting to clean data.
<b>SOP for Cleaning Data for Import</b>	This file provides a standard operating procedure (SOP) in cleaning data, reviewing common and frequent errors and saving clean data into a new file.
<b>UGA Slate Training Video for Cleaning Data</b>	This Zoom video walks through the SOP for Cleaning Data for Import. This video includes working on a sample original document, identifying cleaning errors and saving the clean data into a new file.

## Special Formatting Table for Import Data

Birthdate (MM/DD/YYYY)	Program of Interest (Banner Code)	Creation Date (MM/DD/YYYY)	Status of Formatted Data
10/16/2002	EDD_MUED	10/16/2021	CLEAN
10/16/02	EDD_MUED	10/16/2021	DIRTY
10/16/2002	EDD, Music Education	10/16/2021	DIRTY
10/16/2002	EDD_MUED	10/16/2021	DIRTY
10/16/2002	EDD_MUED	10-16-21	DIRTY

# Cleaning Data from the Original Excel Document

- Step 1: Open original excel document
- Step 2: Open ***Uploads Template for Import***
- Step 3: Reference the ***Special Formatting Table for Import Data*** before you attempt to clean data in original excel document
- Step 4: Clean data in original excel document and make sure to include special formatting needs
  - Check to change any *fully capitalized names* in original excel document
    - Ex: change Marquis JOHNSON to Marquis Johnson
  - Check to confirm that students have capitalized the *first letter of their first and last name* in original excel document
    - Ex: change marquis Johnson to Marquis Johnson
  - Check through *email address formatting errors* in original excel document
    - Ex: change [Marquis.Johnson@gmail.co](mailto:Marquis.Johnson@gmail.co) to [Marquis.Johnson@gmail.com](mailto:Marquis.Johnson@gmail.com)

# Copy and Paste Clean Data to Uploads Template for Import

- Step 5: Copy and paste relevant columns to *Uploads Template for Import*
- Step 6: Recheck columns and data
  - Most common mistakes missed after copy and paste process include:
    - Formatting errors referenced in the **Special Formatting Table for General Data**
      - Ex: **Creation Date** shows 10-16-21 instead of 10/16/2021
    - Spacing errors in Columns
      - Ex: **Intended Term** might list Fall2022 instead of Fall 2022
      - Ex: **Previous Institution** might list Georgia StateUniversity instead of Georgia State University
    - Duplicate Names errors
      - Ex: Marquis Johnson's information accidentally listed in two rows instead of one row
    - First Name & Last Name reverse order errors
      - Ex: **First Name** accidentally listed as Johnson instead of Marquis and **Last Name** accidentally listed as Marquis instead of Johnson

# Save Uploads Template for Import as a **New File**

- Step 7: Save *Uploads Template for Import* as a **New File** with Department Name and/or Event Name
  - Ex: Change *Uploads Template for Import* to *Music Ed Fall Open House*
- Step 8: Send to Narke Norton for Review – [yspnarke@uga.edu](mailto:yspnarke@uga.edu)
  - If data needs to be cleaned further after review, the document will be sent back with yellow highlights
  - Once data is reviewed and approved, the **New File** will be uploaded to Slate

# Checklist for Cleaning Data

You can use this checklist to track the cleaning data process

- Step 1: Open original excel document
- Step 2: Open ***Uploads Template for Import***
- Step 3: Reference the ***Special Formatting Table for Import Data***
- Step 4: Clean data in original excel document and include special formatting needs
- Step 5: Copy and paste relevant columns to ***Uploads Template for Import***
- Step 6: Recheck columns and data
- Step 7: Save ***Uploads Template for Import*** as a **New File**
- Step 8: Send to Narke Norton for review – [yspnarke@uga.edu](mailto:yspnarke@uga.edu)