



Standard Operating Procedures for Slate: Cleaning Data to be Imported

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Resource List for Cleaning Data

Resource Name	Details
Uploads Template for Import	This template is the required format to submit clean data to the RDI Slate contact for review.
Formatting Samples of Clean Data in Slate Excel Document	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.
SOP for Cleaning Data for Import	This file provides a standard operating procedure (SOP) in cleaning data, reviewing common and frequent errors and saving clean data into a new file.
UGA Slate Training Video for Cleaning Data	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	10-16-21	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 to 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
 - 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