



Cornerstone Solutions

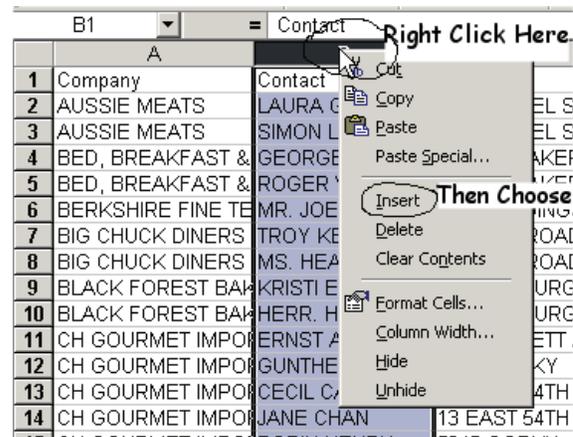
Changing Excel Data to Proper Case...

This procedure assumes you have your data displayed in an Excel workbook and you wish to change the data in some or all of the columns from all uppercase to “proper case”. Proper case is defined here as capitalizing the first letter of each word and making the remaining letters lower case... Thus...

CORNERSTONE SOLUTIONS, INC. becomes **Cornerstone Solutions, Inc.**

To change the entries in a column to proper case...

1. Insert a column to the right of the column you wish to convert. The simplest way to do this is right-click on the column header of the column to the right, and choose **Insert** from the shortcut menu. This will create an empty column to the right of the column you wish to convert.

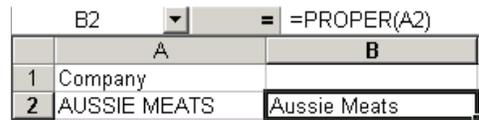


2. In the empty column, to the right of the first entry in the column enter the following formula (lets assume for this example that the uppercase data begins in cell **A2**)...

=Proper(A2)

(make sure to type the “=” at the start of the formula. ALL formulas in Excel must begin with “=”) Press Enter to complete

*the formula, you should now see a proper case copy of the data in cell **A2**. Don’t be fooled. This is a formula NOT actual text, you still need to perform a couple more steps.*



3. Copy the formula down to apply it to the remaining rows in that column, now the new column is a *proper case copy* of the original data.
4. Select the cells that contain the formulas you just created. Now choose “Edit/Copy” from the Excel menu.

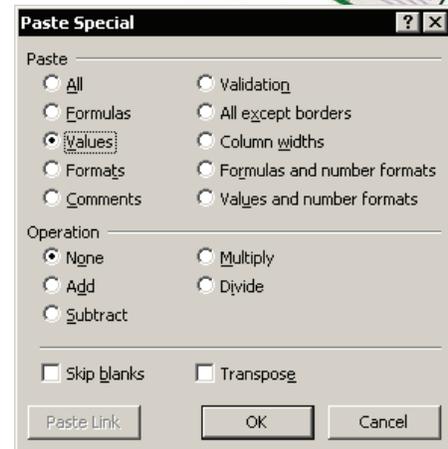




- Now click on the first cell of the original data (in our example this would be cell A1) and choose “**E**dit, **P**aste **S**pecial...” (*Paste SPECIAL, not just Paste*)
The Paste Special dialog box should be displayed...

Select the “**V**alues” option from the dialog box and click **OK**.

The data in the original column should now be replaced with the proper case copies. These are actual text and *not* formulas.



- Finally, right click the heading of the column that still contains your formulas (in our example this would be column B), and choose “**D**elete”.
- Repeat the same process for each column you wish to convert. When you are done and pleased with the results, **F**ile, **S**ave **A**s... the file as a .csv file and you are ready to import it into ACT!.

A few Notes and cautions.

=Proper() is a very literal function. There are some things you will not want converted to proper case, but Proper() could care less, and will do it anyway. For example “**JOHN JONES III**”, would become “**John Jones Iii**” when it is converted using the Proper() function. You can use Excel’s replace command to correct some of these, but some will have to be corrected manually as you run across them.

There are several additional Excel functions that can help you clean up messy data.

- =Trim(cell)**, will remove extra spaces from the data, it will leave only single spaces between the words
- =Clean(cell)**, will remove non printing characters from the data (these usually appear as boxes or heavy vertical lines in between the letters in a cell).

You would use both of these functions in the same way as you will =Proper(cell).

