

Workbook Tools, LLC

WBmerge Data Processing Guide

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Merge Types

WBmerge offers the user two methods to merge Excel workbooks together. Beginning with Version 5, the “Merge by Position” Merge Type was added.

Please note if your worksheet order or column order differs from the source workbook, the workbook WBmerge creates using “Merge by Position” will contain data, but it will not be in the correct order.

The “Merge by Name” Merge Type works if your worksheet order or column order differs from the source workbook, but it requires the column header names and the worksheet names to match to perform the merge.

Workbook Merge Requirements (Merge by Name)

- Worksheets must have column header names on each worksheet you wish to merge.
- Headers must be on the same row on each worksheet you wish to merge.
- Header must be on a row between row 1 and 100. Each worksheet can have headers on different rows.
- Worksheet names selected to merge must match exactly. (Case sensitive check made)
- Column header names selected to merge must match exactly. (Case sensitive check made)
- Worksheet names cannot contain "WBmerge-Results".
- Column header names cannot contain "WBmerge-Key" (Unless Add WBmerge-Key is disabled).

What Data is Merged?

- WBmerge allows the user to select the worksheets and the columns they require.
- The user can mark columns as “Cannot Be Null”, to restrict those columns from being empty (Merge by Name only).
- The user selects the workbooks to merge.
- WBmerge will process each workbook and create a new workbook based on the user’s merge selections.
- Headers for each selected column are copied into the new workbook.
- Next the data is copied into the new workbook.
- WBmerge copies values and not formulas, there is no option to copy formulas currently.
- Number formatting can be copied into the new workbook, but all other formatting is not copied.

Customer Data File Questions

1. Will WBmerge modify my source .XLSX or .XLSM files in any way?

- No, WBmerge will never modify customer source .XLSX or .XLSM files, it will only open customer source files in read-only mode.

2. Should I backup my .XLSX or .XLSM files before merging them into a new single file using WBmerge?

- Backing up your source .XLSX or .XLSM files It is not required before merging your data with WBmerge, but having a backup of your data files always provides extra protection in the event of hardware or software failure. It is best to store backups on a cloud drive or on a separate drive that can be placed in a safe location.

Customer Data File Questions

3. Will WBmerge execute VBA code in a source .XLSM file?

- No, WBmerge will never execute any VBA code within a source .XLSM file, it will only open customer .XLSM source files in read-only mode and read customer data not source code.

Microsoft Excel Limitations

Microsoft Excel is limited to a maximum of 1,048,576 rows per worksheet. If a requested merge has data rows in excess of this limit, WBmerge will display a Data Loss Warning message for each worksheet this condition occurs on and will track the number of data rows that were not written per worksheet.

Please note a WBmerge Data Loss Warning means that data could not be written to the new combined file because of this limitation in Excel. The original source .XLSX and .XLSM files remain the same and are never altered. The Data Loss Warning message only applies to the new combined workbook.

How WBmerge Processes Data Rows (Merge by Name)

Understanding How WBmerge Processes Data Rows	No Columns Marked "Cannot Be Null"	1 or more Columns Marked "Cannot Be Null"
When will WBmerge stop reading a given row of data within a source worksheet?	WBmerge will read until the first empty row is found. As long as a single data cell has data, that row will be included in the merge result.	WBmerge will stop reading the data row as soon as any column marked as "Cannot Be Null" is found to be empty.

Data Processing Errors (Merge by Name)

		Strict Column Matching Setting			
Non-Matching Conditions (Columns)		Enabled	Disabled (default)	Best Practices	Troubleshooting
1 or more column names do not exactly match the selection		All workbooks with columns that do not exactly match the selection will be excluded from the merge. (Matching is Case Sensitive)	All workbooks with columns that do not exactly match the requested column selection will be included in the merge. Unless, a non-matching columns has been designated as "Cannot Be Null", then the entire workbook will be excluded from the merge. (Matching is Case Sensitive)	Make sure to select only columns you know exist in all of the workbooks you wish to merge. You can also disable "Strict Column Matching" to allow for partial column merges.	You can run "Validate Only" rather than a "Merge". This will allow you to identify any problems before you perform the merge. You will have to run "Validate Only" multiple times to work through multiple missing columns.

		Strict Worksheet Matching Setting			
Non-Matching Conditions (Worksheets)		Enabled	Disabled (default)	Best Practices	Troubleshooting
1 or more worksheet names do not exactly match the selection		All workbooks with worksheet names that do not exactly match the selection will be excluded from the merge. (Matching is Case Sensitive)	All workbooks with worksheet names that do not exactly match the requested worksheet selection will have all non-matching worksheets excluded and those that do match will be included in the merge. (Matching is Case Sensitive)	Make sure to select only worksheets you know exist in all of the workbooks you wish to merge. You can also disable "Strict Worksheet Matching" to allow for partial worksheet merges.	You can run "Validate Only" rather than a "Merge". This will allow you to identify any problems before you perform the merge. You will have to run "Validate Only" multiple times to work through multiple missing worksheets.

Document Changes

6/10/2024 – Added Page 2.

6/10/2024 – Document updated to show “Merge by Name” on pages 3, 4, 8 and 9.