

WBmerge Quick Help Reference

Version 5.1.1

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What is WBmerge?

WBmerge is a standalone software program created to merge (combine) data from multiple Microsoft Excel worksheets contained within multiple Excel workbooks into a single new Excel workbook quickly and precisely. It allows users to select only the worksheets and columns they wish to merge. Microsoft Excel does not have to be installed to use WBmerge.

WBmerge can also be used to slice a subset of data from an existing workbook into a new workbook, without any risk of human errors. WBmerge was designed to be the fast, easy, and secure way to merge multiple Excel workbooks.

WBmerge offers the user two methods to merge Excel workbooks together. 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.

Additional Features (Extra Tools):

In addition to merging data, WBmerge also offers two additional powerful capabilities.

- 1 Split an Excel worksheet into multiple worksheets or multiple workbooks with Worksheet Split.
- 2 Inspect an Excel workbook, including VBA code, with the Workbook Inspector.

Google Sheets Users:

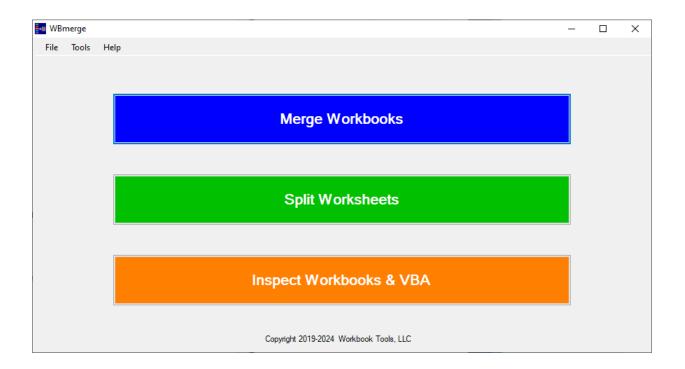
Since WBmerge does not require Microsoft Excel, it is a perfect fit for Google Sheets users too. If you are a Google Sheets user, please download your Google Spreadsheets from you Google Drive to your computer. Next follow the directions below for how to use WBmerge to merge or split your data. Because Google Sheets has a 5 million cell limit, WBmerge tracks the number of cells written so Google Sheets users will know if they have exceeded the Google Sheets limit. WBmerge will never modify any original source workbooks, it will only read source workbooks. This includes merging workbooks, splitting worksheets, and inspecting workbooks and VBA code.

WBmerge Main Program Window

From the main program window, the user can select the desired activity of merge, split or inspect. Each activity is independent and all three can be opened at the same time.

From the menu on the main program window the user can access the license manager and the quick reference help guide, along with multiple other items.

The user can cancel a running merge, validate only process, or split from the "Tools" menu on the main program window. Please note if splitting to workbooks, any new workbooks created before the split is cancelled will still exist.



How to Use WBmerge

Begin by selecting the desired activity – "Merge Workbooks", "Split Worksheets" or "Inspect Workbooks & VBA" from the main program menu. Next follow the below instructions for each activity.

Please note you can have multiple activity windows open at the same time. For example, you can start a large merge and then split a worksheet or inspect a workbook, all while your merge is still running.

Below is the Quick Help Reference window, it can be opened from the "Help" menu on the main program window. You can open the Quick Help Reference and refer to it at any time. It can be opened at the same time as other activity windows. Thus, you can open the Quick Help Reference, then open "Merge Workbooks" and refer to the Quick Help Reference as needed.

New Versions of WBmerge

It is important to note when new versions of WBmerge are made available you will be prompted to install the latest version. Each time you start WBmerge, it checks to see if a new version is available. If a new version is required (mandatory), you will have to install it. If a new version is optional, you can elect to install it or not.

Version Information - <u>https://www.workbooktools.com/version-info</u> Please note that when you install a new version of WBmerge you will be prompted to accept the WBmerge license terms.

License Management:

Users can access the License Manager under the File menu option of the main menu.

The License Manager allows users to:

View their current license type and license information.

Load a new license file - (WBmerge will restart to read the new license file)

Inspect Workbooks & VBA

Workbook Inspector is easy to use, just select the workbook to inspect and it does the rest. Please note it cannot open a password protected workbook, please remove the password before attempting to inspect a workbook.

Workbook Inspector enumerates the following items for a single workbook:

Workbook Properties Workbook Settings Worksheet Details Named Ranges Pivot Tables Tables VBA Code & References Please note VBA projects "Locked for Viewing" will only be displayed if the user confirms they are authorized to view the protected VBA code. The user assumes all legal responsibility for viewing protected VBA code.

All non-cell data including charts, ink, pictures, SmartArt, and other like objects will be included in the count of graphics for each worksheet.

Below is the Workbook Inspector window, which will open when the user selects "Inspect Workbooks & VBA" from the main program menu.

Workbook Inspector Window

What the user will see when they select Inspect Workbooks & VBA

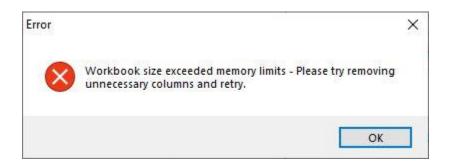
Workb	ook Inpector									- 0	>
									w	Binspecto	or
Prope	rty Name	Value			Worl	kbook Setting	Value			Select Workbook	
										Close	
No.	Worksheet Name		Visibility	Protected	Has Data	Cells with Data	Upper Left Ran	Lower Right R	Named Ran	Tables	P
Name	d Ranges Pivot Tal	bles Tables	VBA Code								
N	lo. Named Range	e			Worksheet		Range			Comment	

Split Worksheets

Worksheet Split can split data in a single worksheet into multiple new worksheets in a single workbook or it can create a new workbook for each split column value with a single worksheet. There can only be one split column.

Please note it cannot open a password protected workbook, please remove the password before attempting to open a workbook to split a worksheet.

If a file is too large to split, the user will receive the below error message. If a user receives this message, they should try making a copy of the workbook to split and removing any unnecessary columns from the split range. It is recommended to limit the number of selected columns when splitting very large workbooks.



How to use Worksheet Split:

Please follow Steps 1–6 in order.

You will need to create a Named Range or a Table using Microsoft Excel for Worksheet Split to use. The range to split must have a minimum of 2 columns and 5 rows. The maximum number of columns in the is 250.

While in Excel, select your data to split, including your column headers. then right click and select "Define Name...", this will create a Named Range.

Make sure your range includes column headers on the first row of the range. (Duplicate headers and blank headers will cause an error)

The column you select for your split cannot have any blank values or be only whitespace. There can only be one split column. Below is the message the user will receive if the selected split column has blank values or whitespace.

Warning		×
	Split Column cannot contain Blank Data or Only Whitespace	
	ОК	

The maximum number of unique split values is 1,000. The program will allow you to open a range with more than 1,000 unique split values, but the user must reduce the selected unique values to 1,000 or less.

Step 1 allows the user to select the input workbook and the Named Range or Table to use as the source of the split.

Step 2 allows the user to select the split column and the split values to include in the split output - new worksheet(s).

Step 3 allows the user to select the columns to include in the split output - new worksheet(s).

Step 4 Allows the user to change the output order of the selected column names in the new worksheet(s).

Step 5 is optional; it allows the user to add a secondary sort order to the output. The primary sort order will always be the column selected to split. You may sort on any column(s) in the source Named Range or Table, even if they are not included in the split output.

Step 6 is where the user will select the split type and setup all the split configuration parameters described below.

New worksheet names will be based on each unique split value. Excel limits worksheet names to 31 characters. Worksheet names will contain the first 31 characters of each split value. The user can enter the name of the worksheet when splitting to workbooks, this is optional. If the new worksheet name text box is left blank when splitting to workbooks, the software will create the worksheet name based on the name of each unique split value.

The user has the option to append a Prefix and/or Suffix (up to 25 characters for each) to the workbook names when splitting to workbooks.

The user has the option to "Add a Table to each Worksheet". The table name will be the name of the worksheet with a "_" appended to the front of the worksheet name. This option is enabled by default. There is a performance penalty for this option with large data sets and turning it off will improve the total time to complete a split.

The user has the option to "Copy Number Formatting" from the source cell to the new cell. This option is enabled by default. There is a performance penalty for this option with large data sets and turning it off will improve the total time to complete a split. If you disable "Copy Number Formatting" the split will run faster but all Non-Generic Excel Number Formatting will be lost. The user has the option to "Add a Uniquifier to Workbook / Worksheet names", an incrementing number starting at 0. When splitting to worksheets the Uniquifier adds up to four (4) characters to the end of the worksheet name. And when splitting to workbooks the Uniquifier adds up to four (4) characters to the end of the workbook name.

There is a process status box on the lower right corner of the Worksheet Split window. The process status box will show when a workbook is opening, a range is selected, and split column is selected.

When a split is executed, this box will show the type of split and the time the split started. When the split completes the end time will be recorded in the process status window.

The user can cancel a running split process from the "Tools" menu off the main program window. Please note if splitting to workbooks, any new workbooks created before the split is cancelled will still exist.

Vorksheet Split				- 🗆 X
vorksneet Split				~
Step 1 Step 2 Step	ep 3 Step 4 Step 5	Step 6		
				WBsplit
How to use Worksheet Split			^	
Follow Step 1-6				
			h	Start Over
		a single new workbook with multiple works		
You will need to create a Name have a minimum of 2 columns	ed Range or a Table using Microsoft Exc and 5 rows. The maximum number of c	el for Worksheet Split to use. The range to s olumns is 250.	split must	
Start Here =	==> Select Workbo	ok		Close
				Close
Selected Workbook				
Range Type Na	lame	Worksheet	Range Adc	
				Process Status
Selected Range				
	Select Range to	Split		

Below are six (6) screenshots of the six (6) steps to perform a Worksheet Split.

Norksheet Split		- □ >
Step 1 Step 2 Step 3 Step 4 Step 5 Please Select the Column to Split from the below Dropdown List then click	Step 6	WBsplit
Set Split Column Items Selected (Maximum 1000)	~	Start Over
Uncheck items below to exclude from the Split Split Item Values	Count of Items Check All Items	Close
	Uncheck All Items	
	Check All Items Like	
		Process Status
	Please Click "Next Step" when Re	ady

orksheet Spl	lit						- 0
o 1 Uncheck	Step 2	Step 3	Step 4	Step 5	Step 6		WBsplit
Column					Split Column	Check All Items	Start Over
						Uncheck All Items	Close
							Process Status
						Next Step	
					Ρ	lease Click "Next Step" when Ready	

Worksheet Split		- 🗆 X
Step 1 Step 2 Step 3 Step 4 Step 5 Step 6 Set Worksheet Output Column Order		WBsplit
Column Name	Move Up	Start Over
	Move Down	Close
	Cancel Changes	
		Process Status
	Next Step Please Click "Next Step" when Ready	

Worksheet Spli	t							-	· 🗆	×
Step 1 Column S	Step 2	Step 3	Step 4	Step 5	Step 6 Secondary Sort Order (C	heck Iter	n to sort Decsending)	WB	split	
Column	Name				Column Name			Start	Over	
								Clc	se	
ļ	dd to Sort				Move Up			Process Status		
					Move Down					
This	Step is Optior	nal			Remove from Sort	Please	Next Step	,		

Worksheet Split	- 🗆 X
Step 1 Step 2 Step 3 Step 4 Step 5 Split to Worksheets	WBsplit
Select Split Type ==> Split to Workbooks	Start Over
Target Folder Location	
Select Target Folder	Close
Append Prefix to Workbook Names (max 25) Append Suffix to Workbook Names (max 25) New Workbook Name (.XLSX will automatically be added) - Only applies when Splitting to Worksheets	
New Worksheet Name - Optional (max 31)	
Add a Table to each Worksheet Copy Number Formatting Add Uniquifier to Workbook / Worksheet Names	Process Status
Worksheet and Workbook names are created from the selected Split Column Values ^ User can optionally set the Worksheet Name when Splitting to Workbooks Workbook Names may ONLY contain letters, numbers and () # & or a space Worksheet Names may ONLY contain letters, numbers and `~! @ # \$ % ^ & () = + {} ! : . < . > ' or a space v	
Execute Split	

Merge Workbooks

The below window will open when the user selects "Merge Workbooks" from the main program window. The user must select the merge type when they select "Merge Workbooks" from the main program window. The user can change the merge type by pressing the Clear / Reset button.

Please note that merging by position takes the position of the selected worksheets and columns from the source workbook and uses those positions against all selected worksheets. If the order of your columns or worksheets is not the same across all files, the merged workbook will not be consistent.

If you have worksheets or columns in differing orders, please use "Merge by Name". "Merge by Position" was created for users with multiple workbooks with the same data in the same order, but differing worksheet names and or column names. "Merge by Position" validates the input workbooks can be successfully opened, it also checks for partial worksheets. It performs no other validations or checks against the worksheets or columns. This process is referred to as a Basic Validation.

"Merge by Position" does not support the following:

- 1. Templates
- 2. Worksheet Re-Ordering
- 3. Strict Column Matching
- 4. Strict Worksheet Matching
- 5. Non-Null Columns

"Merge by Position" 5 allows the user to merge multiple workbooks with multiple worksheets where the worksheet names and column names do not match.

Please follow the below steps in this section to properly merge workbooks using WBmerge. Please note WBmerge reads cell values and not formulas, the merged workbook will contain the value of the source cell containing a formula.

The user begins by selecting "Select Workbook" or "Open Template". When they open a workbook or template, they have the option to set the header location for each worksheet. Once this step completes the Worksheet/Column Selection Tree will populate.

The user will use the Worksheet/Column Selection Tree to select the worksheets and columns to include in the merge. The user can change the worksheet and column order from this window.

Workbook Merge		- 0
emplate File Name		WBmerge
Vorkbook Source File		Merge Type - Name
Vorksheet / Column Selection Tree	Results Window	
		Select Workbook
		Save to Template
		Open Template
	Set Merge Type	Clear / Reset
	Merge by Name is the recommended Merge Type	Strict Column Matching
		Strict Worksheet Matching
	Merge by Name Merge by Position	Copy Number Formatting
		Results Shading
		Add Table to Worksheets
		Add WBmerge-Results
		Add WBmerge-Key
		Merge
		Validate Only
Expand Tree Chec	All Worksheet Order Process Status	Save Results to File
Collapse Tree Unche	sk All Column Order	Close

There are seven (7) merge options the user can set from this window. Later in this help guide is a step-by-step section on performing a merge with more information on each option.

The below two images show the merge form window for both a "Merge by Name" and "Merge by Position". The merge type indicator is highlighted in yellow to contrast the two different merge types.

Workbook Merge	- 🗆 X
Template File Name	WBmerge
Workbook Source File	Merge Type - Name
Worksheet / Column Selection Tree Results Window	
	Select Workbook
	Save to Template
	Open Template
	Clear / Reset
	Strict Column Matching
	Strict Worksheet Matching
	Copy Number Formatting
	Results Shading 🗹
	Add Table to Worksheets 🗹
	Add WBmerge-Results 🔽
	Add WBmerge-Key 🔽
	Merge
	Validate Only
Expand Tree Check All Worksheet Order Process Status	Save Results to File
Collapse Tree Uncheck All Column Order	Close

Workbook Merge				
Template File Name				WBmerge
Workbook Source File				Merge Type - Position
Worksheet / Column Sel	lection Tree		Results Window	
				Select Workbook
				Save to Template
				Open Template
				Clear / Reset
				Strict Column Matching
				Strict Worksheet Matching
				Copy Number Formatting
				Results Shading
				Add Table to Worksheets
				Add WBmerge-Results
				Add WBmerge-Key 💆
				Merge
				Validate Only
Expand Tree	Check All	Worksheet Order	Process Status	Save Results to File
Collapse Tree	Uncheck All	Column Order		Close

Select Data Header Rows Window

If the header row for any worksheet is not on row one (1) of the worksheet, you will need to make sure to properly set it here.

	Worksheet	Header Ro	w (1-100)	Set all Header Rows to the same Value
•	Pivot Sales	1	~	
	Sales	1	\sim	1 ~
	Sales Detail	1	\sim	
	Sales By Seller	1	\sim	Press to Set
	Products	1	\sim	
	Customers	1	\sim	

Change Worksheet Order (Merge by Name only)

The user can use this feature to change the order of the worksheets or remove worksheets. Multiselect is supported for remove only. It is recommended to remove unwanted worksheets first using multiselect. If you make a mistake press Cancel Changes and start over. A template can be used to save any changes to the worksheets made in this step. When closing the Workbook Merge window, you will be prompted to save your pending worksheet changes to a template. This feature will not change your original source workbook or template. If you opened a template, you would need to create a new one to save your changes.

Worksheet Name	Is Selected	Move Up
Pivot Sales		wove op
Sales		
Sales Detail		
Sales By Seller		
Products		Move Down
Customers		
		Remove
		Multiselect supported for Remove
		Cancel Changes
		Cancer Changes
		Save Changes

Change Column Order (Merge by Name only)

The user can use this feature to change the order of the columns or remove columns from a worksheet. You will need to use this feature for each worksheet you wish to make column changes. Multiselect is supported for remove only. It is recommended to remove unwanted columns first using multiselect. If you make a mistake press Cancel Changes and start over. A template can be used to save any changes to the columns made in this step. When closing the Workbook Merge window, you will be prompted to save your pending column changes to a template. This feature will not change your original source workbook or template. If you opened a template, you would need to create a new one to save your changes.

Worksheet Name	Sales		
Column Name		Is Selected	Move Up
Order No.			
Date			
Customer No.			
Total Price			
Sales Represer	ntative		Move Down
			Remove
			Remove
			Multiselect supported for Remove
			Cancel Changes
			Save Changes

Merge Data Setup Window

The user will set the new workbook name and location in this window. They will also select the files to include in the merge. A template can be used to save any changes to the columns made in this step.

ew Workbook Folder Location Select Folder ease use Select Folder button w Workbook Name (WBmerge adds .XLSX file extension) wtkbooks to Merge ile Name (Multiselection is Supported)	Add Items By
w Workbook Name (WBmerge adds .XLSX file extension) rkbooks to Merge	 Files Folders
rkbooks to Merge	 Files Folders
	 Files Folders
	 Files Folders
	O Folders
	Add home
	Add Home
	Add items
	Remove Items
	Clear
orkbook Count -	
Run Merge Cancel	

How to use WBmerge Step by Step:

1. Select a source Workbook or open an existing WBmerge Template.

• To begin, press the "Select Workbook" button on the main WBmerge program window and follow the instructions. The worksheets and columns in the source workbook will be loaded into the "Worksheet / Column Selection Tree". Next select the desired worksheets and columns to merge. You can also select if specific columns must have data by using the "Cannot Be Null" checkbox next to the column in the "Worksheet / Column Selection Tree". The name of the selected workbook will be displayed in the "Workbook Source File" once opened.

• Do my selected columns have to be in the same location on each worksheet? No, WBmerge will find your columns provided they exist on the defined header row. If some of your workbooks to merge have extra columns, it will not impact WBmerge provided the extra columns are not selected as part of the merge. Please make sure to only select columns you know exist in all your workbooks.

• How do I know what source workbook to use? Think of the source workbook as a guide to help WBmerge understand your workbook structure. If you have multiple workbooks to merge, you can use any of those workbooks as the source. If you wish to slice data from a single workbook, then that workbook will be your source workbook. Please note the source workbook is only used to populate the "Worksheet / Column Selection Tree", it is not automatically added to the workbooks to merge list. If you wish to include it in the merge you must add it as a file to merge when you reach that step in the process.

• When you open the source workbook you will be asked if all data headers are on row one (1). If they are not, the Select Data Header Rows window will open to allow you to select where your header rows are located. You can select the header row by individual worksheet, or you may set all header rows to the same row for all worksheets. Header rows must be on a row between row 1 and 100. Press the "Selections Complete" button to close the Select Data Header Rows window.

• There are six (6) buttons below the "Worksheet / Column Selection Tree" that can be used to expand the tree, collapse the tree, select all worksheets and columns, deselect all worksheets and columns, modify worksheet order (Merge by Name only) and modify column order (Merge by Name only).

• The "Clear / Reset" button will clear the "Worksheet / Column Selection Tree" and the "Results Window". It will also allow you to switch the merge type between "Merge by Name" and "Merge by Position".

• If all selected columns can be Null, WBmerge will read each desired data row until it reaches the first row without any data in any selected column. If any column is cannot be Null, WBmerge will stop reading data once a blank column is encountered for a column marked "Cannot Be Null". You can mark multiple columns as "Cannot Be Null". (Merge by Name only)

2. Set the Merge Parameters

Merge Parameter	Default Status	Enabled	Disabled
Strict Column Merge	Disabled	Workbooks selected to merge without all requested columns will be excluded from the merge.	Workbooks selected to merge without all requested columns will be included in the merge. A partial column merge will occur. Please note that columns marked as "Cannot Be Null" cannot be excluded.
Strict Worksheet Merge	Disabled	Workbooks selected to merge without all requested worksheets will be excluded from the merge.	Workbooks selected to merge without all requested worksheets will be included in the merge. A partial worksheet merge will occur.
Copy Number Formatting	Enabled	Copies the Excel Number Format from each source cell to each target cell.	No formatting is copied from the source cell.
Results Shading	Enabled	Every other results data set will be shaded in light blue to separate it from the previous data set.	No results data shading is performed.
Add Table to Worksheets	Enabled	An Excel table will be added to each worksheet, except for the "WBmerge-Results" worksheet. The table name will be the name of the worksheet with a "_" appended to the front of the worksheet name.	No tables will be added.
Add WBmerge-Results	Enabled	Add the WBmerge-Results worksheet to the new workbook.	WBmerge-Results worksheet will not be added.
Add WBmerge-Key	Enabled	Adds the corresponding WBmerge-Key to the end of each new row.	No WBmerge-Key will be added.

• Strict Column Matching (Merge by name only) - This option is disabled by default (unchecked). When you remove the check from this option WBmerge will allow merges to occur with partial column matching. If a partial column merge is selected and a non-present column is marked as "Cannot Be Null", then the affected workbook will not be merged. If "Strict Column Matching" is enabled, all selected workbooks to merge without an exact match on all requested columns will be excluded from the merge. WBmerge will write non-existent column data cells with an empty cell. If no columns exist for a worksheet within a source workbook, then no data will be written.

• Strict Worksheet Matching (Merge by name only) - This option is disabled by default (unchecked). When you remove the check from this option WBmerge will allow merges to occur with partial worksheet matching. If your merge requests a total of four (4) worksheets and three (3) exist and one does not the workbook will be included in the merge. If "Strict Worksheet Matching" is enabled, all selected workbooks to merge without an exact match on all requested worksheets will be excluded from the merge.

• Copy Number Formatting - This option is enabled by default (checked). This option will copy the Excel Number Format from each source cell to each target cell. There is overhead in copying the Excel

Number Format from source cells to target cells. If you disable "Copy Number Formatting" the merge will run faster but all Non-Generic Excel Number Formatting will be lost. You can reapply the number formatting back after the merge. Note, number formatting is not copied for empty cells.

• Results Shading - This option is enabled by default (checked). Every other results data set will be shaded in light blue to separate it from the previous data set. There is a performance penalty for this option with large data sets and turning it off will improve the total time to complete a merge.

• Add Table to Worksheets - This option is enabled by default (checked). An Excel table will be added to each worksheet, except for the "WBmerge-Results" worksheet. The table name will be the name of the worksheet with a "_" appended to the front of the worksheet name. There is a performance penalty for this option with large data sets and turning it off will improve the total time to complete a merge.

• Add WBmerge-Results - Add the WBmerge-Results worksheet to the new workbook.

• Add WBmerge-Key - Adds the corresponding WBmerge-Key to the end of each new row.

3. Execute the Merge

• Press the "Merge" button. If you wish to only validate your workbooks to merge without performing a merge, then press the "Validate Only" button". The Merge Data Setup window will now be displayed to the user.

4. Data Setup

• The Merge Data Setup window allows the user to tell WBmerge the name and location for the new workbook (.XLSX file) to create. The user must also select the workbooks to merge into the new workbook. For Validate Only, users will only need to select the workbooks to validate.

• The Merge Data Setup window allows the user to select the workbooks to merge by File or Folder, which is controlled by a button on the form. The user must set the button to the desired option, then press the "Add Items" button. The user can switch back and forth between Files and Folders.

When the Folder option is used, all .XLSX and .XLSM files within the selected folder will be added to list. The select by Files option allows the user to select one or multiple workbooks at one time.

• There is a Remove Items option that allows the user to remove one or multiple workbooks from the list. To remove items the user should first highlight the workbook or workbooks to remove, then press the "Remove Items" button.

• You can see the number of workbooks you have selected by looking at the workbook counter below the "Workbooks to Merge" window. This is helpful when working with many workbooks.

5. Manage Merge Validation Errors (Merge by Name)

• If validation errors are found during a merge, a window will be presented to the user displaying all validation errors. The reason for validation failure will be shown next to each workbook.

• The user can elect to continue the merge or cancel it. If the user continues the merge, all workbooks failing validation will not be included in the merge.

• When a user runs a "Validate Only" the validation errors window will not be displayed, rather the user needs to review the "Results Window" to review the validation results.

(A long running Merge or Validate Only can be cancelled from the menu on the main program window)

6. Open your new Merged workbook

• Open your new workbook and review the results and consume your data. Please note, WBmerge adds an extra worksheet to the new workbook named "WBmerge-Results", please see the Advanced Topics section below to learn more about the "WBmerge-Results" worksheet.

WBmerge Templates (Merge by Name only)

• Once you open a source workbook and make your worksheet and column selections, you may save them off to a WBmerge Template for future use. Just press the "Save To Template" button and follow the instructions. All the worksheets and columns in the source workbook will be added to the new WBmerge Template along with your worksheet, column and "Cannot Be Null" selections. The

header rows displayed for the source workbook will be added to the WBmerge Template. You can share WBmerge Templates with other WBmerge users.

• To open an existing WBmerge Template, press the "Open Template" button. The "Worksheet / Column Selection Tree" will be populated based on the selections stored in the WBmerge Template. Users can edit the selected worksheets and columns if desired, along with controlling columns that must have data via the "Cannot Be Null" checkbox. When a "Worksheet / Column Selection Tree" is displaying the results of a WBmerge Template, the name of the WBmerge Template will be displayed in the "Template File Name" box at the top of the main program window.

• When you open a WBmerge Template the Select Data Header Rows window will open to show you where the header rows are set for each worksheet. You can change the header rows from this window, but they will not be saved back to the WBmerge Template you just opened. Any header row changes you make will be applied to any merges you run while the WBmerge Template is open. If you wish to save your header row changes, you may save them to a new WBmerge Template.

• When a WBmerge Template is loaded, the name displayed in the "Workbook Source File" will be the name of the workbook the WBmerge Template was originally created from. The workbook may no longer exist, but that will have no impact on the merge or validate only operations. A WBmerge Template has no dependency on the source workbook it was created from.

• To create a new WBmerge Template from an existing WBmerge Template, open the existing WBmerge Template and make your changes. Then press "Save to Template" and follow the instructions to create your new WBmerge Template.

Understanding the "WBmerge-Results" worksheet:

The "Results Window" on the main program window provides information about the current running process. You can save the content of the "Results Window" to a text file (.TXT), press the "Save Results to File" button. If the system experiences an unexpected error, please make sure to capture the contents of the "Results Window" as soon as the error occurs, this will help in troubleshooting the issue.

Look at the worksheet named "WBmerge-Results" in your newly created workbook. It includes a lot of the same data that is displayed in the "Results Window".

The "WBmerge-Results" worksheet incudes the below columns:

•	Merge Start Date/Time		One item only
•	WBmerge Version		One item only
•	WBmerge Template File		One item only
•	WBmerge Source Workbook		One item only
•	Strict Column Matching		One item only
•	Strict Worksheet Matching		One item only
•	Copy Number Formatting		One item only
•	Results Shading	One ite	em only
•	Add Table to Worksheets		One item only
•	Count of Merged Workbooks		One item only
•	Count of Merged Sheets		One item only
•	Count of Merged Columns-		One item only
•	WBmerge-Key		One per workbook merged
•	Merged Workbook Name		One per workbook merged
•	Merged Workbook Path	One pe	er workbook merged
•	Validation Status		One per workbook merged
•	Merge Date/Time		One per workbook merged
•	Count of Merged Worksheets		One per workbook merged
•	Sum of Merged Data Rows		One per workbook merged
•	Sum of Data Rows NOT Merged (Exceeded Capa	city)	One per workbook merged
• merge	Worksheet Name		One per worksheet included in the
• merge	Header Row		One per worksheet included in the
• merge	Data Rows Written		One per worksheet included in the
• merge	Data Rows NOT Written (Exceeded Capacity)		One per worksheet included in the

Data Cells Written

merge

Each merged workbook is assigned a "WBmerge-Key" displayed in the "WBmerge-Results" worksheet. Each data record has a "WBmerge-Key" located at the end of each record to be able to identify the source merged workbook the record originated from. The "WBmerge-Key" can be used to perform the Excel VLOOKUP function against the merged data and used to slice the data when added to a pivot table.

Understanding Data Loss

Excel has a maximum limit of 1,048,576 rows per worksheet. If a merge exceeds this capacity, the user will be warned for each worksheet this condition occurs on. They will receive a popup window and this data will be written to the "Results Window" and the "WBmerge-Results" worksheet in the new workbook.

• WARNING Data Loss ==> Maximum Data Rows of 1,048,575 Written to Sheet "Sheet Name" / Data Rows Found but Not Written = "Number of Rows Not Written"

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.

System Specifications

- Windows Operating System Supported Windows 7 or higher & Windows Server 2012 R2 or higher
- Computer CPU No specific CPU requirement
- Computer Memory 2 GB recommended (larger merges will require larger amounts of memory)
- Computer Display 1024 x 768 minimum display supported (Display changes require user sign out of Windows and re-login to Windows)

Please note that low disk space can cause Windows system problems including affecting the performance and behavior of WBmerge.

The Microsoft .NET Framework 4.7 or higher is required. The WBmerge installer will check for this and help make sure this is installed during program setup.

WBmerge utilizes EPPlus 4.5.3.3 Interfaces - Licensed under GNU Lesser General Public License (LGPL) v3.0 (License Information- https://www.gnu.org/licenses/lgpl-3.0.en.html). The WBmerge installer will install EPPlus during program setup.

WBmerge utilizes the MySQL Connector/NET 8.0 Interfaces - Licensed under GNU General Public License Version 2.0, June 1991 - MySQL Connector/NET 8.0 Interfaces are consumed via a published NuGet package (<u>https://www.nuget.org/packages/MySql.Data/8.0.30</u>). The WBmerge installer will install MySQL Connector/NET 8.0 Interfaces during program setup.

Workbook Requirements to be included in a Merge:

- Worksheet Columns must have Headers Names on the same row for all columns
- Header Rows may be on any row between row 1 and 100
- Header Rows can be on different rows in each worksheet
- Worksheet Names must match exactly (Case sensitive check made)
- Worksheet Column Header Names must match exactly (Case sensitive check made)
- Worksheet Name cannot contain "WBmerge-Results"
- Column Name cannot contain "WBmerge-Key" (unless Add WBmerge-Key is disabled)

Supported File Types

- .XLSX (Excel 2007 and higher Default Excel File Type)
- .XLSM (Macro enabled Excel Workbook) No VBA Code is ever executed

Non-Supported File Types:

- .XLS (Excel 97-2003 Workbook)
- .XLSX (Strict Open XML Document) Looks like an XLSX workbook but is not the same internal format
- .XLSB (Binary Excel Workbook)
- ODS (Open Document Spreadsheet)
- .CSV (Comma Separated Text File)

• .XML (Extensible Markup Language File)

Password Protection

- The program cannot open password protected Workbooks.
- The program can read password protected worksheets.
- The program can read hidden worksheets and Columns
- The program can read worksheets marked Very Hidden

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