

How To Guide

Compiled by NavaTech.

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GRIDOC - How to Guide Overview

1. Overview

Welcome to the new and exciting world of GRIDOC!

GRIDOC is an online productivity tool for merging data from multiple Worksheets or CSV files using Drag and Drop.

With **GRIDOC**, you can combine tables into single master table or merge data by custom rules, all managed by simple and easy to use user interface instead of complicated macros and formulas.

This GRIDOC How To Guide walks you through the basic flow required to parse multiple Excel and CSV files, combine the tables, merge data, and clean it up for your further analysis. GRIDOC is an extremely powerful for these activities and can be a very useful alternative to the manual processes or painful VBA scripts frequently used in business settings today.

GRIDOC - How to Guide Key Features

2. Key Features of GRIDOC

The following table shows the different core features of GRIDOC.

Sl. No.	Key Features	Description
1	Combine Tables into Single Master Table	You can merge data spread across tens or hundreds of files.
2	Merge Data by Custom Rules	You can create rules to join tables from different files and discover relations in your data.
3	Consolidate Data across Rows and Columns	You can detect duplicates or extract unique values using Drag and Drop.
4	Visualize and Analyze your Data	You can get interactive insight into your data with dynamic charts.
5	Automatic XLS, XLSX, and CSV File Processing	You can simply drag your Excel or CSV files to the browser and have them processed.
6	Instant Paging, Sorting, and Full Text Search	You can perform instant paging, sorting, and full text search and it works out of the box for all uploaded files.
7	Share Selected Workbooks	You can make selected files available for your coworkers, or share whole workspace.
8	Export Results	You can download results or save them into your workspace for later.

GRIDOC - How to Guide Basic Usages

3. How to...

3.1. Use the Product at a Basic Level

3.1.1 Perform Registration

Follow these instructions to complete registration.

1. Enter the **URL** address, as appropriate in the browser window.



Figure 1- URL address to access GRIDOC

2. This brings in the **Gridoc – Login Page** for you to gain access to the site.



Figure 2- Griddoc – Login Page

3. Click **Register** to proceed with the registration process.

Note: If you already have the log-in credentials, you can provide the same in this Log In screen.

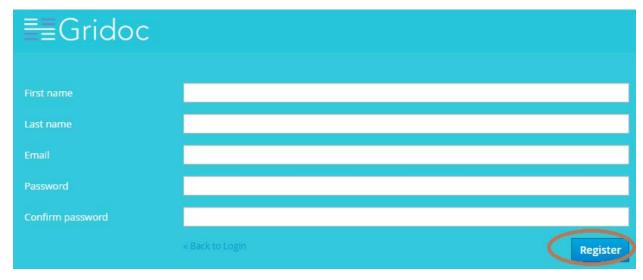


Figure 3- Registration Details

4. Provide the registration details and click **Register**.

3.1.2 Add Sample Files

This section describes the steps to add sample files into your Workspace or manage your account after successful registration.

Follow these steps:

1. Navigate to the Workspace drop-down option on your top right-hand side.



Figure 4- Workspace Option

2. Select Add Sample Files. This adds the sample files to your Workspace.



Figure 5- Add Sample Files



Figure 6- Sample Files added to Workspace

3.1.3 Upload CSV and Excel Files

This section describes the steps to upload CSV and Excel Worksheets.

Follow these steps:

1. Click the Upload option on your left-hand side.

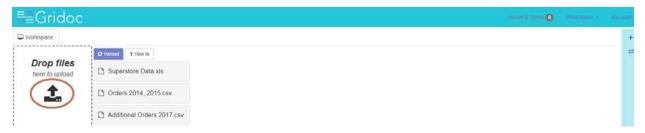


Figure 7- Drop Files – Upload Option

2. Select the file, as appropriate.



Figure 8- Locating the File for Upload

3. Drag and Drop the identified file to the Workspace area to upload and process. Once uploaded, the file is added to your Workspace.



Figure 9- Uploaded File in Workspace

4. Content will be plugged-in shortly. Once uploaded, files are added to your Workspace

3.1.4 Open Files

This section describes the steps to open the files. Note that the added sample files are listed under the **Reload** button.

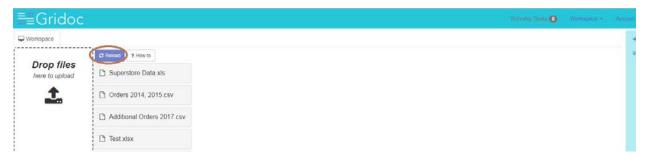


Figure 10- Reload Button

Follow these steps:

1. Click the file that you intend to open and view. For instance, the Superstore Data.xls. This displays the Worksheets of the Excel file.

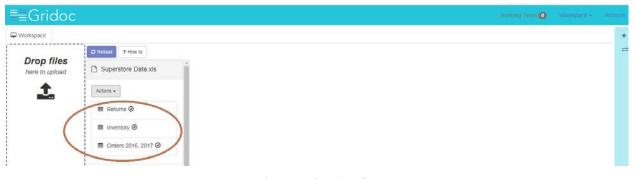


Figure 11- Opening Files

2. Click on a specific Worksheet to view the contents. For instance, Returns. This takes you to the Returns Table structure where you can see the OrderNumber and Status fields.

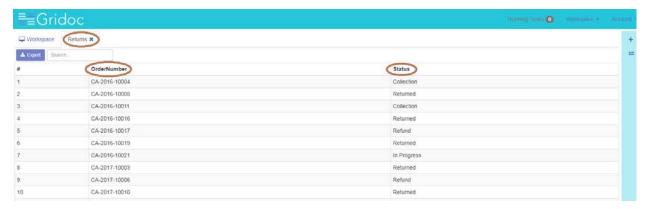


Figure 12- File Column Headers

3. Click over the Search area and provide your search criteria. If you have a huge volume of data, you can use the search option to locate specific data in the Table.



Figure 13- Search Criteria Option

4. Click Export option to export the data (number of rows).



Figure 14- Export Option

5. Click Export 1 Rows in this example. This displays the Export Download dialog box.



Figure 15- Export Results

6. Click **Download**. With this option, you can download the data for your future references.



Figure 16- Export Download

3.1.5 Browse Pages of Data

GRIDOC supports automatic XLS, XLSX, and CSV File Processing. You can simply drag your Excel or CSV files to the browser and have them processed.

Follow these steps:

1. Click on the file that you intend to browse through and view its Pages/ Contents.

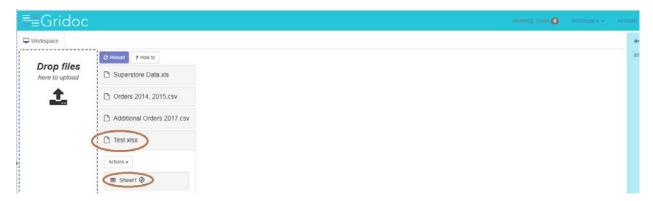


Figure 17- Browse through Files

2. This displays the structure of the Page. For instance, the various Column Headers that you might want to use for your respective tasks.



Figure 18- Browse through Column Headers

3.1.6 Manage User Account

This section describes the steps to effectively manage the user accounts.

3.1.6.1 Edit Account

This section describes the steps to modify the account details.

Follow these steps:

1. Modify the details, as appropriate.

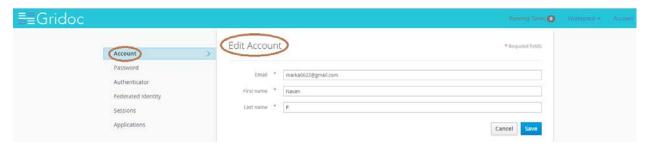


Figure 19- Edit Account

2. Click Save.

3.1.6.2 Change Password

This section describes the steps to change your profile password.

Follow these steps:

1. Provide your current password and the new password.

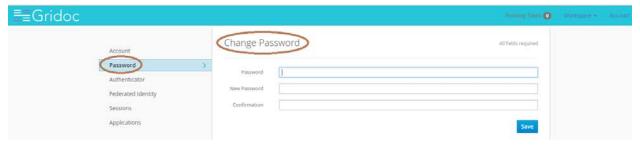


Figure 20- Change Password

2. Click Save.

3.1.6.3 Authenticator

This section describes the steps to authenticate your account.

Follow these steps:

- 1. Install FreeOTP or Google Authenticator on your device. Both applications are available in Google Play and Apple App Store.
- Open the application and scan the barcode or enter the key. For instance, NR3F ANLU OJCH CSCH M5ZH KMCQ JFBE UOLW.



Figure 21- Authenticator

3. Enter the one-time code provided by the application and click **Save** to finish the setup.

3.1.6.4 Federated Identities

This section describes the steps to let you use the identification to obtain access to network.

Follow these steps:

1. Click **Add** against the appropriate federated identity.

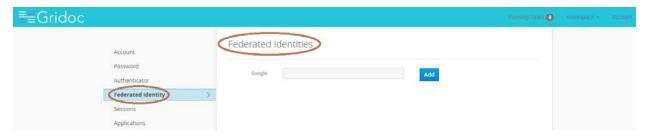


Figure 22- Federated Identities

2. This lets you use the same identification data to obtain access to the networks of all enterprises in the group.

3.1.6.5 Sessions

This section describes the steps to track the session details and as well to log out of all sessions at once. Follow these steps:

1. Click **Sessions**. This displays the IP address, the sessions start and end timelines, last access details, and clients.



Figure 23- Sessions

2. Click **Log out of all sessions** to navigate to GRIDOC Log-In Page.

3.1.6.6 Applications

This section describes the steps to track the application access permissions.

Follow these steps:

1. Click **Applications**. This displays the list of applications that are running at a given point in time, the available permissions, granted permissions, granted personal info, and other details.



Figure 24- Applications

2. Click on the applications hyperlink to navigate to the appropriate destination from this page.

3.2. Combine Datasets Feature

This section describes as to how you merge files with similar columns into single master data table.

The following simple illustration demonstrates the Combine Datasets feature and provides insight to the business users. The objective here is to merge File #1, File #2, and File #3 with similar columns into a Single Master Data Table. The following are the similar columns in the files:

- ID
- First Name
- Last Name
- Username

Note:

- File #1: Contains COMPLETE data
- File #2: Has MISSSING ID values
- File #3: Has MISSING USERNAME column







Figure 25- Combine Datasets Sample Requirement

The Combine Datasets Feature aligns data from all three files into columns appropriately as shown below.

ID	First Name	Last Name	Username
1	Peter	Sanchez	@hellop
2	Maria	Livingston	@living
	Mark	Otto	@mdo
	Jacob	Thornton	@thor
5	Joe	Smith	
6	Jane	Johnson	

Figure 26- Combine Datasets Sample Result

Note: GRIDOC appropriately handles the Missing values or Columns during this process.

Follow these steps to combine datasets:

1. Click the + (Plus) Sign to start performing the combine datasets feature.

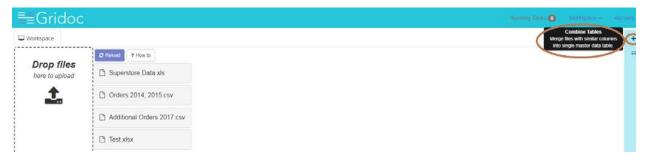


Figure 27- Combine Tables – Toolbar Option

2. This displays the **Combine Tables**. In this view, you can merge files with similar columns into a single Master Data Table.

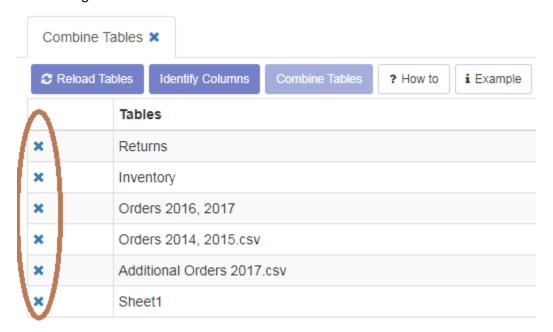


Figure 28- Combine Tables

Note: The highlighted **X Signs** in the above figures denote the list of Data Tables found in your Workspace. You can remove Tables that you don't want to be merged into the Master Data Table.

3. Post your modifications, you can reload the list of tables by clicking **Reload Tables**. You might consider this as a useful step if you have accidentally deleted a Table.

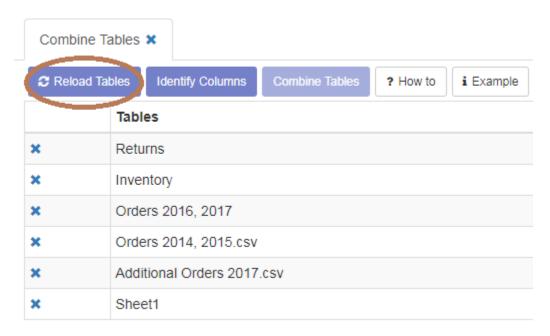


Figure 29- Reload Tables View

- 4. Click **Identify Columns** to identify the common columns found in the Tables.
- 5. Finally, click **Combine Tables** to merge the Tables into a Single Master Data Table with common columns, and saves it into your Workspace.

Note: The Combine Tables task can take up to 5-10 minutes based on your volume of data.

3.2.1 Example

The following example provides a little more insight to better clarify the powerful Combine Datasets feature.

1. On your right-hand side Toolbar, click + (Plus) Sign to start combining the datasets.

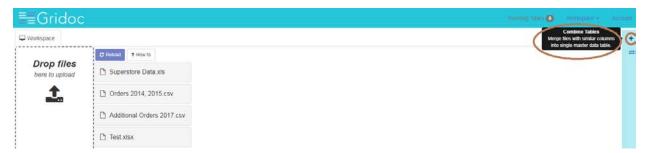


Figure 30- GRIDOC Home Page - Combine Tables View

- 2. This displays the **Combine Tables** Tab along with the following other options for you to explore as part of Combine Datasets feature.
 - **Reload Tables**. Loads all the Tables from your Workspace as highlighted in the below illustration. You can remove those Tables that you do not want to use for this task.

- Identify Columns: Identifies similar columns that you might want to combine.
- **Combine Tables**: Based on your selections, combine those tables into a Single Master Data Table.



Figure 31- Table Loading based on Workspace

Note: You combine files with similar columns into Single Master Data Table. Files are with different formats, such as **Superstore Data.XLS** and **Orders 2014, 2015.CSV**.

- 3. In this case, you can use the following Tables and combine those into a Single Master Data Table.
 - Orders 2016, 2017
 - Orders 2014, 2015.CSV
 - Additional Orders 2017.CSV



Figure 32- Combining Tables View

4. Click **Identify Columns**. This identifies the columns similar in the selected Tables, as appropriate. The **X** symbol denotes the similar columns presented in those selected Tables.

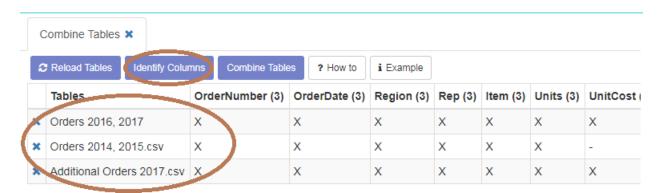


Figure 33- Identify Columns

Note: There are slight differences in Columns between these files. Based on your requirement, you might want to combine as many tables as you wish to.

5. Click **Combine Tables**. This step performs the magic as shown below. Once you combine the Tables, GRIDOC updates your Workspace appropriately.

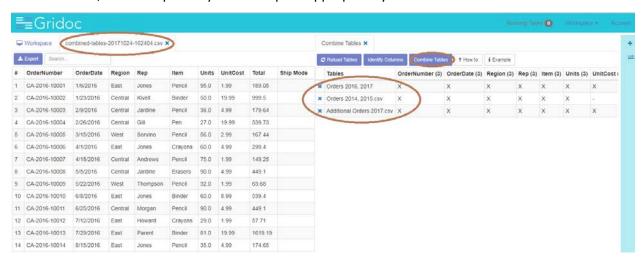


Figure 34- Identify Similar and Missing Columns

3.2.2 Example

The following example provides a little more insight to better clarify the powerful Combine Datasets feature.

- 1. In this case, you can use the following Tables and combine those into a Single Master Data Table.
 - Returns.XLS
 - Inventory.XLS
 - Orders 2014, 2015.CSV

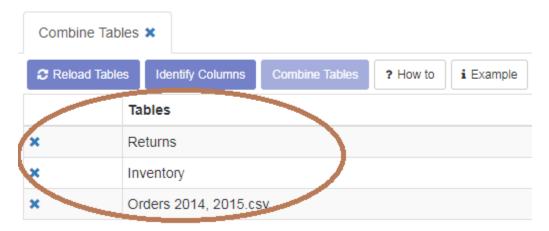


Figure 35- Combining Tables View-1

2. Click Identify Columns. This identifies the columns similar in the selected Tables, as appropriate. The X symbol denotes the similar columns presented in those selected Tables.

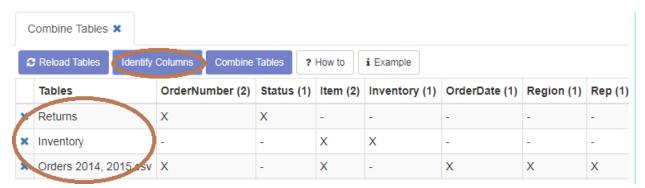


Figure 36- Identify Columns-1

3. Click **Combine Tables**. This step performs the magic as shown below. Once you combine the Tables, GRIDOC updates your Workspace appropriately.

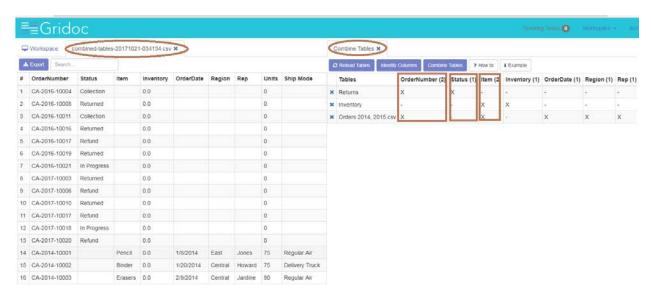


Figure 37- Identify Similar and Missing Columns-1

Note: As part of performing the Combine Datasets Feature, GRIDOC handles the following:

- OrderNumber MISSING in Inventory.XLS Table
- Status MISSING in Inventory.XLS and Orders 2014, 2015.CSV Tables
- Item MISSING in Returns.XLS Table

3.3. Merge Data Feature

This section describes as to how you connect tables by matching their rows and join them into a Single Data Table.

The following simple illustration demonstrates the Merge Data feature and provides insight to the business users.

1. In this view, you can connect Tables by matching their rows and joining them into Single Data Table.



Figure 38- Merge Data View

2. You can Drag and Drop a column header from one of the open files on the left.

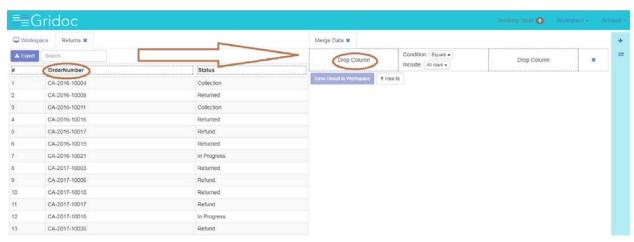


Figure 39- Drag and Drop Column Headers to Matching Row Left

3. You can Drag and Drop a column header from another open file. GRIDOC automatically matches rows from both files.



Figure 40- Drag and Drop Column Headers to Matching Row Right

4. You can select matching condition or determine if you want all rows or only matching rows to be included in the result.

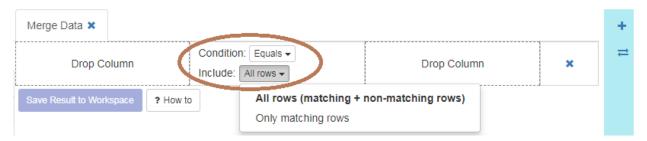


Figure 41- Conditions

5. You can delete a Matching Rule, if you wish to, using the X sign highlighted below.



Figure 42- Deleting a Matching Row

3.3.1 Example

The following example provides a little more insight to better clarify the powerful Merge Data feature.

1. On your right-hand side Toolbar, click the icon as highlighted below to start performing the Merge Data feature.

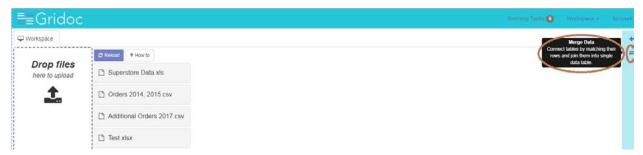


Figure 43- Merge Data Toolbar View

2. This displays the **Merge Data** button along with the following other options for you to explore as part of Merge Data feature.

 Drop Column (Left). This denotes the Matching Rule – Left Column. You can drag and drop a column header from the open tables at your left.

- **Conditional Parameters**: This denotes the conditional parameters that you may intend to include as part of this Merge Data feature. This includes all rows or a specific row OR specific conditions, if any.
- **Drop Column (Right)**: This denotes the Matching Rule Right Column. You can drag and drop a column header from the open tables at your left.

Note: When you drag and drop your Column Header to the Matching Rule – Right for your Data Merge, GRIDOC internally updates the **Running Task**.



Figure 44- Running Task

- 3. In this case, you can use the following Tables and Column Headers and merge those data into a Single Data Table.
 - Orders 2016, 2017 OrderNumber Column Header that matches with OrderNumber Column Header in Returns Table.

Note: In this case you merge two tables.

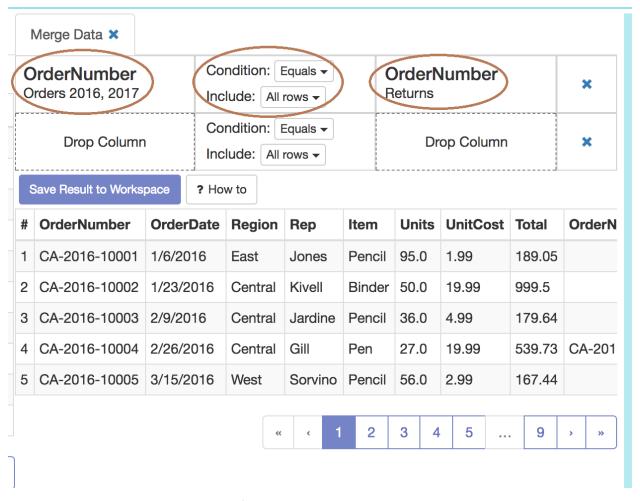


Figure 45- Merge Data Parameters

4. Based on your selections for Merge Data, GRIDOC performs the remaining magic and displays the data in the **Results Grid**.

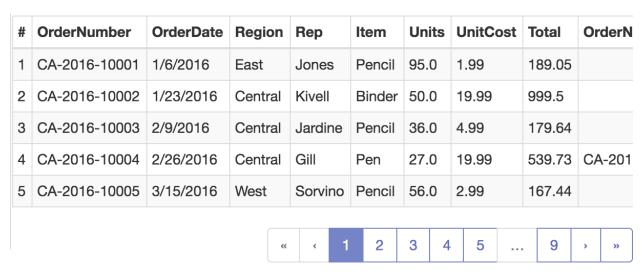


Figure 46- Merge Data Results

5. Click Save Results to Workspace. This updates your Workspace appropriately.

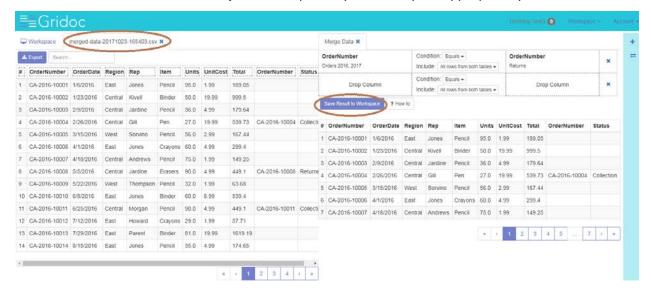


Figure 47- Saving Results to your Workspace

3.3.2 Example

- In this case, you can use the following Tables and Column Headers and merge those data into a Single Data Table.
 - Orders 2016, 2017 OrderNumber Column Header that matches with OrderNumber
 Column Header in Returns Table
 - Orders 2016, 2017 Item Column Header that matches with Item Column Header in Inventory Table

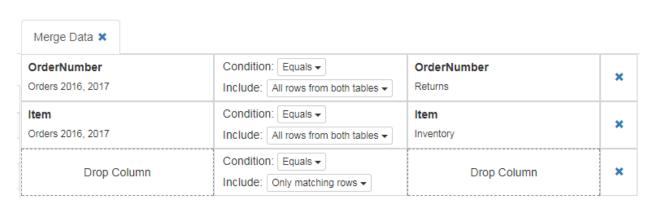


Figure 48- Merge Data Parameters-1

Note: In this case, you merge three tables.

2. Based on your selections for Merge Data, GRIDOC performs the remaining magic and displays the data in the **Results Grid**.

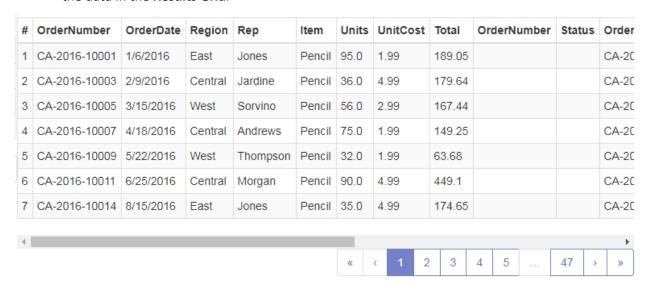


Figure 49- Merge Data Results-1

3. Click Save Results to Workspace. This updates your Workspace appropriately.

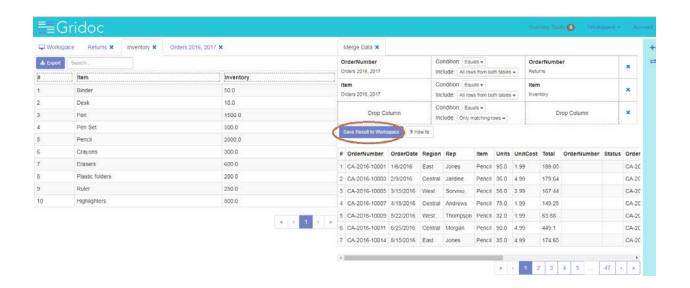


Figure 50- Saving Results to your Workspace-1

4. Frequently Asked Questions

GRIDOC - what it is all about?

GRIDOC is online productivity tool for merging data from multiple worksheets or CSV files using Drag and Drop. You can combine tables into single master table or merge data by custom rules, all managed by simple and easy to use user interface.

How does it work?

GRIDOC is an application for merging and consolidating data from Excel workbooks or CSV files. It transforms data into comprehensible structure and makes it easy to quickly perform tasks which could otherwise take hours.

Should I worry about uploaded data?

We deeply respect the trust of our users who upload their precious data into our service. One of our main tasks is to make sure your data are protected and stored in highly secured environment. There is no 3rd party access to your data, ever. We carefully use sample data from our users to test algorithm improvements.

Where can I submit bug or feature request?

Please use our issue tracking system to submit bug or feature request.

Do you offer Enterprise Version of Griddoc (hosted in private network)?

If you need complete control over the server which runs GRIDOC, there is an option to have it installed into private enterprise network. The other possibility is private cloud hosting, in which GRIDOC instance runs in the cloud, however with special setup which guarantees exclusive access for the customer. For more information please contact service@18.220.176.218.

Can I merge more than one Excel file without resorting?

You can merge multiple Excel files into one without resorting to some sort of statistical program, such as SPSS. You can as well bookmark it use for future requirements.

Can I merge multiple CRM CSV Worksheets with Griddoc?

Yes. GRIDOC brings together the appropriate fields so easily and flawlessly. You might want to perform a quick concatenate and sort afterwards that would in turn save you time significantly.

Is it a user-friendly system?

GRIDOC site is absolutely user-friendly and easy to use; however yet is really powerful under-the-hood.

How about sharing Interactive Pivot Tables and Datasets with GRIDOC?

Imagine you could easily create and share interactive Pivot Tables from your Workbooks or CSV files. Sounds complicated? Not at all! GRIDOC automatically process your Excel Workbook or CSV file and then use Sharing feature to create shareable link. You can achieve this with a few clicks. From now on, you can create links to your workspace or any subset of files it contains. Sharing is flexible!