# SAFARI General Instructions

Open Excel. Click on the Data Tab. Click on "From Other Sources". Select "From Miscrosoft Query".

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	Home	Ins	ert Pa	ge Layout 🛛 🖡	Formulas	Data Review	~	View
Fro	m From ess Web	From	From Othe	Existing Connections	Refresh	Connections Properties Edit Links	⊉↓ ∡↓	AZA Sort
	A1	Get Ext		From SQL Server Create a connect into Excel as a Ta	r tion to a SQ able or Pivot	L Server table. Imp Table report.	ort dat	ta
1	А	В	1	From Analysis S Create a connec Import data into	ervices tion to a SQ Excel as a T	L Server Analysis Se able or PivotTable	ervices	cube.
2				Open or map a 3	Import KML file into	Excel.		
4 5				From Data Conr Import data for Connection Wiz	an unlisted	ard format by using the EDB.	e Data	
7	_	>		From Microsoft Import data for a Query Wizard ar	Query an unlisted nd ODBC.	format by using the	e Micr	osoft

Select the Database you would like to pull from:

Choose Data Source	×
Databases Queries OLAP Cubes	ок
<new data="" source=""></new>	Cancel
EIS* Excel Files*	Browse
MS Access Database* Safari_Connection*	Options
USAS*	Delete
Use the Query Wizard to create/edit queries	

Insert your Reflections Password in the "Password" field.

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Server Connect -		23
Login Information Server Name User Name Password	acces0.access-k12.org manchester	Set Variables Trouble Shooting
Command File Name	oecn\$:safari usps	Password
Service Parameters Port Number	#23341	
Safari InfoServe	udmssrv	
ОК	Cancel	

A popup will display while searching for the data source (Reflections).



Once connected, you can select the data you want to use. Open up the table (by clicking on the + sign beside the name) to see the selections.

Query Wizard - Choose Columns	23
What columns of data do you want to include in your query? <u>A</u> vailable tables and columns: <u>C</u> olumns in your query: <u>A</u> DECN_USERS <u>ABSENCE_REC</u> <u>ACCOUNT_HIST</u> <u>ACCT_HIST_REC</u> <u>ADOPT_DED_REC</u> <u>ANNUITY_DED_RE</u>	4
Preview of data in selected column:	
	ICEI

## Example of Table view:

Query Wizard - Choose Columns	×
What columns of data do you want to include in your query?         Available tables and columns:       Columns in your query:         Image: Dob POS_REC       Image: Dob POS_REC         Image: Dob POS_REC_       Image: Dob POS_REC	
Preview Now     Options     < Back     Next >	Cancel

## Example of selected columns:

Query Wizard - Choose Columns	×
What columns of data do you want to include in your query?         Available tables and columns:       Columns in your query:         TOTAL_YEARS_OF_EXPERIE       >         HIRE_DATE       >         OATE_HIRED       <         DATE_TERMINATED          HINIT_AMOUNT       >         Preview of data in selected column:	4
Preview Now Options < Back Next > Cancel	_

Once data is pulled over, you can place your entries into the order that you want to see the columns by using the up & down arrows.

Once columns are arranged, you can select "Next" to move to the next screen.

Query Wizard - Choose Columns	×
What columns of data do you want to include in your q <u>A</u> vailable tables and columns: TOTAL_YEARS_OF_EXPERIE HIRE_DATE ODHS_HIRE_DATE <u>OATE_HIRED</u> DATE_HERMINATED UNIT_AMOUNT	uery? <u>C</u> olumns in your query: EMPLOYEE_ID LAST_NAME FIRST_NAME EMPLOYEE_REPORT_TO_EMIS JOB_NO JOB_STATUS
Preview of data in selected column:	: <u>B</u> ack <u>N</u> ext > Cancel

All data in Reflections is pulled unless you filter the query.

If you only want to see active jobs, then you pull in the job\_status and set the filter to 1.

In Reflections, a job status of 1 = active.

Other possible filters would include Start and Stop dates.

All data must be reviewed when it gets to Excel.

Click on "Next" to continue.

Query Wizard - Filter Data		×
Filter the data to specify which If you don't want to filter the da <u>C</u> olumn to filter: EMPLOYEE_ID LAST_NAME FIRST_NAME EMPLOYEE_REPORT_TC JOB_NO JOB_STATUS	rows to include in your query. ata, click Next. Only include rows where: JOB_STATUS equals And C Or And C Or	•
		-
2	< <u>B</u> ack <u>N</u> ext >	Cancel

Data within the columns can be sorted on this Query Wizard – Sort Order screen. This step is optional.

Click on "Next" to continue.

Query Wizard - Sort Order		×
Specify how you want your data sorted. If you don't want to sort the data, click Next.		
Sort by LAST_NAME	Ascending	-
FIRST_NAME	<ul> <li>Ascending</li> <li>Descending</li> </ul>	
Then by	Ascending Descending	-
2	: <u>B</u> ack <u>N</u> ext > Can	cel

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\* Optional Step:

At this point, you can save your query if you will be using it again. Click on "Save Query".

Query Wizard - Finish	
What would you like to do next?         Image: Comparison of the state of the	Save Query
	Optional: Can save query for future use.
<u></u>	< <u>B</u> ack Finish Cancel

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#### A "Save As" box appears.

Give the query a name you will remember for future use.

## Save on your computer.

Save As		~
Save in:	Desktop	
Recent Places	Libraries System Folder	
Desktop	Bonnie Manchester System Folder	
Libraries	Computer System Folder	
Computer	Network System Folder	
Network	5 yr Forecast File folder	
	DIOMED	-
	File name: Emis Flags Sav	e
	Save as type: Query Files (*.dqy)	cel

A query icon will be placed on your computer. The query icon will look like this:



The next time you want to activate the search, double click on the query icon. Excel will open. You may see a Microsoft Security Notice. Click "Enable" to get to the login screen.

Microsoft Office Excel Security Notice	ନ	23
Microsoft Office has identified a potential se	ecurity c	oncern.
File Path: C:\Users\manchester.OHIO\Desktop\Emis Flags.	dqy	
Data connections have been blocked. If you choose to enable connections, your computer may no longer be secure. Do no content unless you trust the source of this file.	e data t enable t Dis	his

Insert your Reflections password & click OK.

The query that you previously saved will display with current information.

#### Click on "Finish".

Query Wizard - Finish	
What would you like to do next?	
<u>B</u> eturn Data to Microsoft Office Excel	Save Query
C ⊻iew data or edit query in Microsoft Query	
	< Back Finish Cancel

The "Import Data" popup will display. It will default to placing the information in the first cell of column A unless you select another area.

Click "OK" to continue.



The data will populate the worksheet.

The columns will display in the sort order that you set up in the Query Wizard.

	А	В	С	D	E	F
1	EMPLOYEE_ID	last_name 💽	FIRST_NAME	EMPLOYEE_REPORT_TO_EMIS 🔽	JOB_NO 🔽	JOB_STATUS 🔽
2	0000001	Bunny	Bugs	Ν	1	1
3	0000002	Duck	Donald	γ	1	1
4	0000003	Fudd	Elmer	Ν	1	1
5	0000004	Mouse	Mickey	γ	1	1
6	0000005	Pig	Porky	Ν	1	1

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## To add more information to the spreadsheet:

Open the query by double clicking. You may see a Security notice – select "Enable".



A login will appear. Type in your Reflections password & hit enter. The information will populate the spreadsheet.

Click on the "Data" tab.

Click on the arrow under "Refresh All" to open a drop down window.

Select "Connection Properties".

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Refresh All *		De Conne Prope Se Edit L	ections erties .inks	≵↓ Z↓	A 2 S	
	R	efresh <u>A</u> ll				
2	R	<u>R</u> efresh				
•	Refresh Status					
₫k	⊆a	<u>C</u> ancel Refresh				
	Connection Properties					

Select the "Definition" tab & click the "Edit Query" button.

Connection Propert	
Connection name: Description:	Vendor Query
Usage Definitio	201
Connection type:	Database Query
Connection file:	C:\Users\ Browse
	Always use connection file
Connection string:	:
	Save password
Command type:	SQL 👻
Command text:	SELECT VENDORS, VENDOR, NO, VENDORS, NAME 1, VENDORS, NAME_2, VENDORS, ADDRESS_1, VENDORS, ADDRESS_2, VENDORS, CITY, VENDORS, STATE, VENDORS, CITY, VENDORS, STATE, VENDORS, CITY,
Excel Services:	Authentication Settings
[ Edit Query ]	Parameters Export Connection File
	OK Cancel

You may see a Microsoft Query message:

Microsoft Query		23
<u> </u>	This query cannot be edited by the Query Wizard.	
	ок	

Click OK.

The query will appear in Microsoft Query format.

Put your cursor in the last column heading & a drop down arrow will appear. Click on the arrow to display additional records. Select columns to add.

-

		<u>±</u>
		ACCOUNT_NU 🔺
		ADDRESS_1
		ADDRESS_2
		 CATEGORY
ZIP_CODE	YTD_TOTAL	 CHECK_ADDF
	35	CHECK_ADDF
25914	225	CHECK_CITY
	322	CHECK_COUN 🔻
20202.0102	617.01	

#### Select File>Return Data to Microsoft Office Excel

File	Edit	View	Format	Table	Criteria	Records	V
	New						
	Open.						
	Close						
	Save						
	Save A	\s					
	Table	Definiti	on				
	Execut	te SQL					
	Cance	and R	eturn to N	licrosoft	Office Exe	cel	
	Return	n Data t	o Microso	ft Office	Excel		

#### Click "OK" in the Connection Properties box

Connection Propert	Connection Properties 2 2					
Connection <u>n</u> ame: Description:	Vendor Query					
Usage Definitio	n					
Connection type:	Database Query					
Connection file:	C:\Users\					
	Always use connection file					
Connection string:						
	Save password					
Command type:	SQL 👻					
Command text:	SELECT VENDORS.VENDOR_NO, VENDORS.NAME_ 1, VENDORS.NAME_2, VENDORS.ADDRESS_1, VENDORS.ADDRESS_2, VENDORS.CITY, VENDORS.STATE, VENDORS.ZIP_CODE,					
Excel Services:	Authentication Settings					
Edit Query	Parameters,,, Export Connection File					
	OK Cancel					

#### You will get a warning message. Click "Yes".



A login prompt will display. Login using your Reflections credentials & click "OK". The query will go out and find the new information and add it to the existing query. If any other changes had been made to fields on the spreadsheet, the new information would populate.

Server Connect -		×
Login Information	acces0.access-k12.org	Set Variables
User Name	manchester	Trouble Shooting
Password		
Command File Name	oecn\$:safari usas	
CService Parameters—		
Port Number	#23341	
Safari InfoServer	udmssrv	]
ОК	Cancel	

# EXCEL TIPS

### To Filter:

The columns are set to "Filter". Look for the down arrow at the end of each column heading. Click on the column you would like to filter.

All data will be selected (i.e. "Select All).

You can uncheck that box & select the items you are looking for.

Click "OK" to display the filtered data.



## To Sort:

Put the cursor in the top box of the column that you want to sort. Click on Sort A to Z. The column and all of the information connected to it will sort as requested.

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Sort Filter	&	Find & Select ▼	
₽↓	<u>s</u>	ort A to Z	
Ă↑	s	ort Z to A	
•	C <u>u</u> stom So		rt
<b>Y=</b>	F	ilter	
X	C	lear	
Y.	R	eapply	

**To Highlight all:** Click the "Global Selector" button or Press CTRL + A.



### To Auto Adjust Column Width:

Once highlighted, you can auto adjust every column by double clicking on the line between the columns. You will see an icon like this:



Once you see the icon, you are on the line. Double click & the column will expand to your longest entry.

### То Сору:

Highlight the area that you want to copy. Right click on the mouse & select "Copy" from the drop down or click on the copy icon or

click CTRL + C.

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Сору		
Paste	Home Insert Page Layout	
Paste Special		
Insert		
Delete	Paste 📕 B Z U - 🖓 - A	
Clear Co <u>n</u> tents		
<u>F</u> ormat Cells	Clipboard 19 Font	
Row Height	Copy (Ctrl+C)	
<u>H</u> ide	Copy the selection and put it on	
Unhide	r 1 EMI the Clipboard. or C	TRL
	Cut <u>Copy</u> Paste Paste <u>Special</u> Insert Delete Clear Contents Format Cells Row Height <u>H</u> ide <u>U</u> nhide	Cut <u>Copy</u> Paste         Paste         Paste         Special         Insert         Delete         Clear Contents         Format Cells         Row Height         Hide         Unhide         Or         Or

The area that is about to copy will have "dancing" dash marks around it. Select the next tab & paste the data into it.

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heet1 Sheet2	🔨 🕄 🖉

### To Paste:

Put your cursor in the cell that you want to copy the data into. Right click on the mouse & select "Paste" or click on the Paste icon or

+ C

Click CTRL + V



#### To Rename Tabs:

Double click on the Sheet name to highlight the area. Once it turns black, type in the new name.

## **To Split Screen Horizontally:**

Click on the minus sign to the right & pull it down below the column heading line.



The cursor will change to: 🚝. Pull down to split the screen.

## **To Split Screen Vertically:**

Click on the thin bar at the bottom right corner & pull to the left.



The cursor will change to: 🖤 . Pull to the left to split the screen.

## To Undo Split Screen:

Double click on the line that splits the screens.



## To Zoom In or Out:

In the bottom left corner, view size can be manipulated by sliding the cursor to left or right.



## **To Sum Column:**

Click on column letter to highlight the column.



On the "Home" tab, click on "AutoSum". The totals will drop to the bottom of the column.



## **To Create Leading Zeros:**

Right click on the column letter & select "Format Cells".

On the "Number" tab, select "Custom".

Put your cursor in the box where "General" is and erase that entry. Insert zeros for each character in the cell. (Exp: IRN = 6 characters. Insert 6 zeros). Click "OK"



**Important:** Once saved – do not reopen. If the file is reopened, this formatting is lost and will need to be re-formatted.

The zeros will be placed at the beginning. 1 would appear as 000001

#### **FIELD DEFINITIONS**

SSDT documentation can be found at:

http://ssdt.oecn.k12.oh.us/

Select the Documentation Tab:



Select the Field Definitions at the bottom of the list:

Field Definitions for UDMS-SAFARI ODBC

These documents define the fields that are available in each table. Selections during each query must be made from one table at a time.