

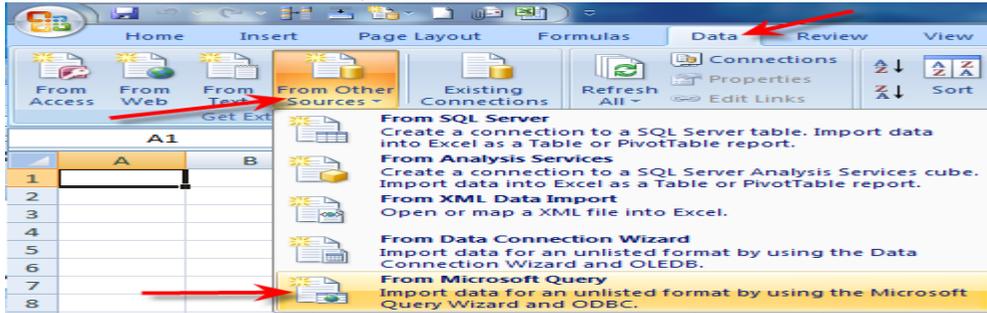
# SAFARI General Instructions

Open Excel.

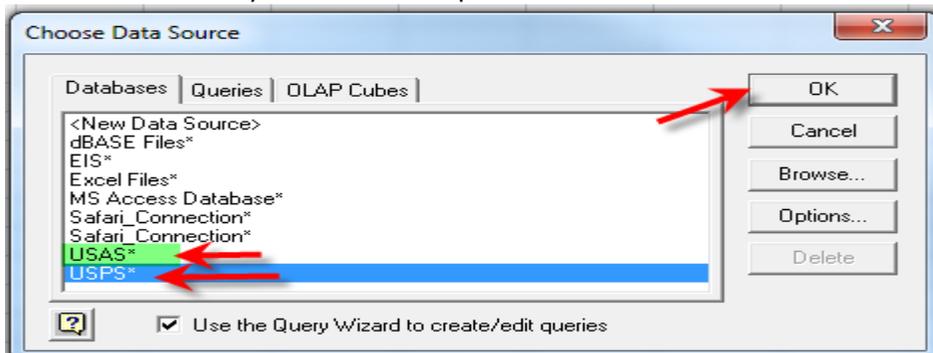
Click on the Data Tab.

Click on "From Other Sources".

Select "From Microsoft Query".

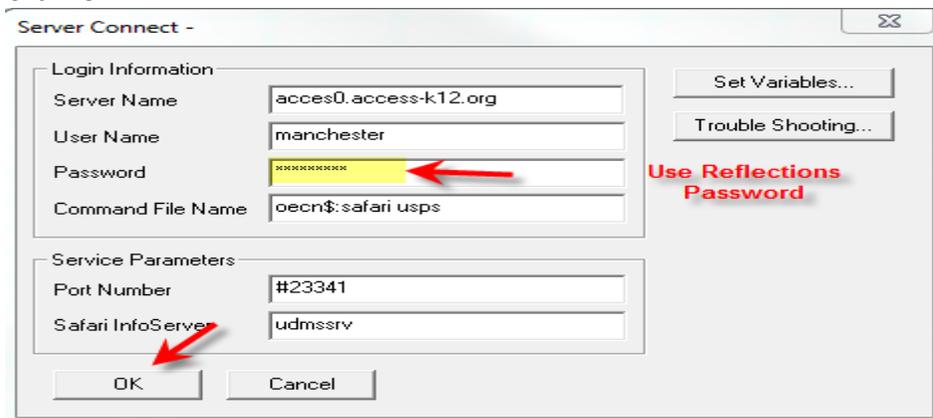


Select the Database you would like to pull from:

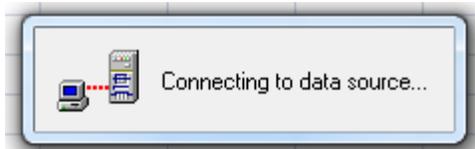


Insert your Reflections Password in the "Password" field.

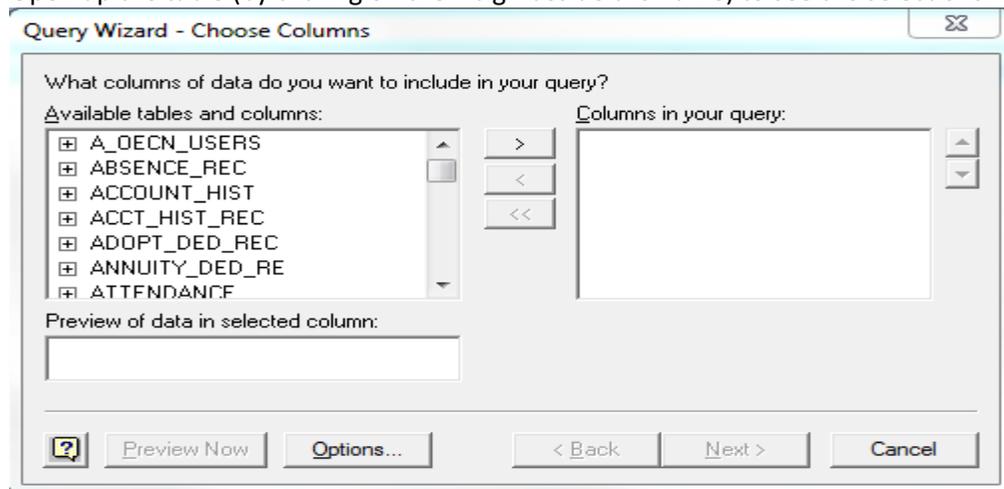
Click "OK".



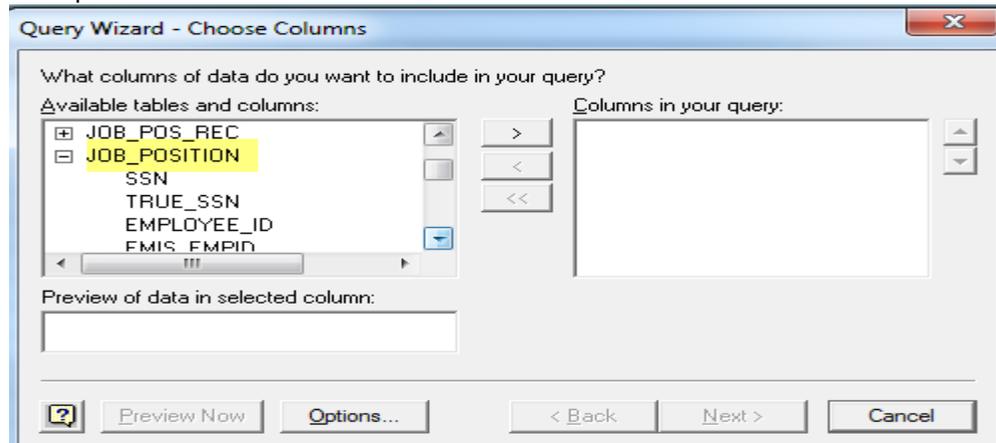
A popup will display while searching for the data source (Reflections).



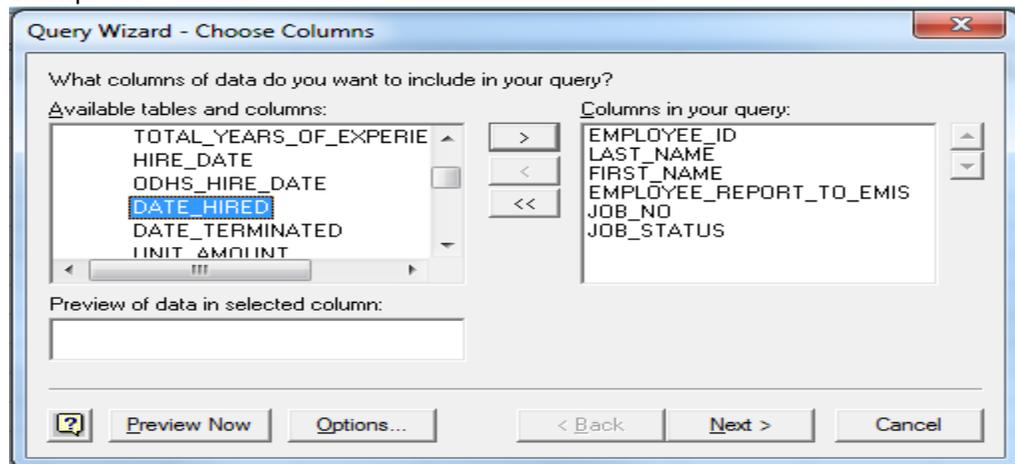
Once connected, you can select the data you want to use.  
Open up the table (by clicking on the + sign beside the name) to see the selections.



Example of Table view:

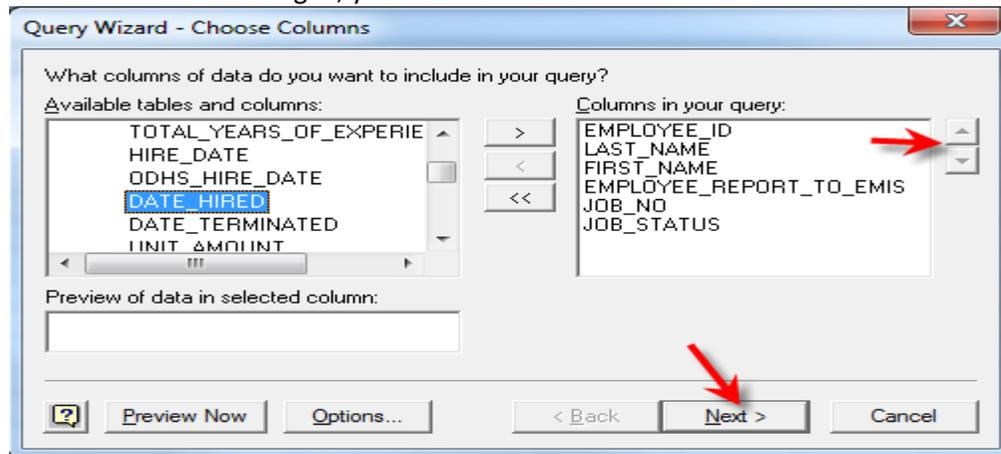


Example of selected columns:



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.



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

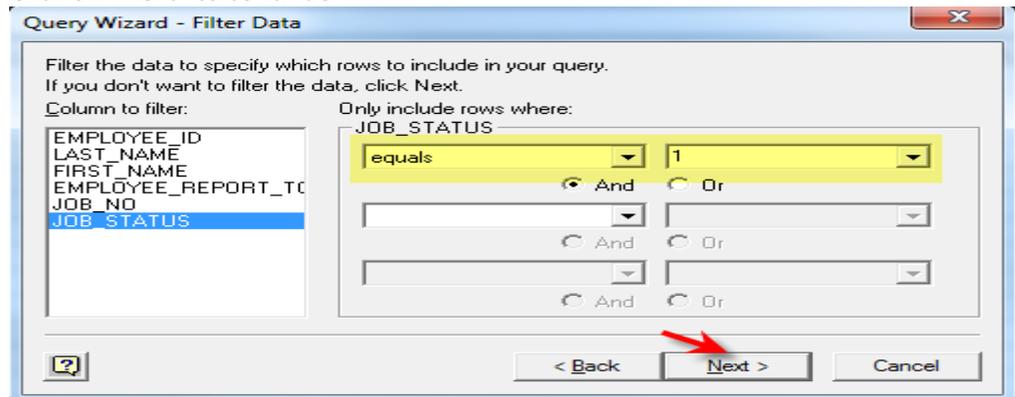
If you only want to see active jobs, then you pull in the job\_status and set the filter to 1.

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.

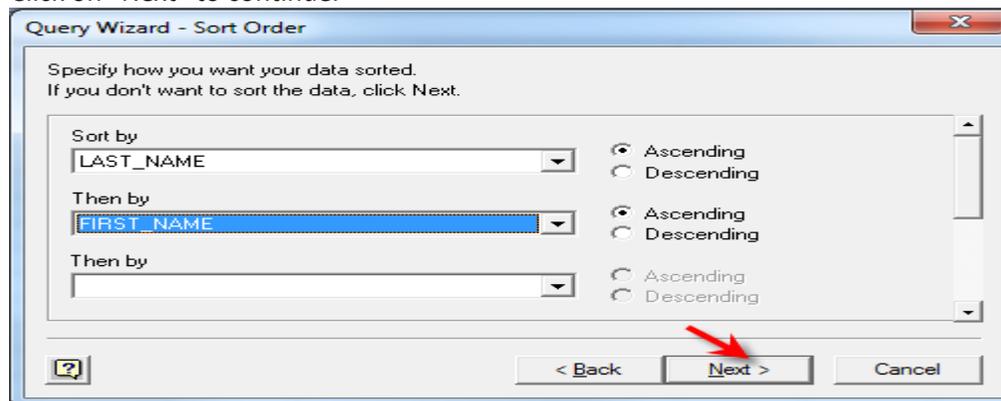
Click on “Next” to continue.



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

This step is optional.

Click on “Next” to continue.

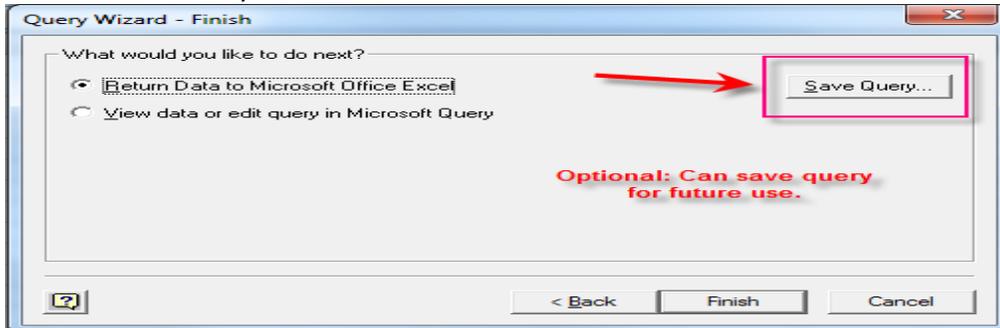


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Optional Step:

At this point, you can save your query if you will be using it again.

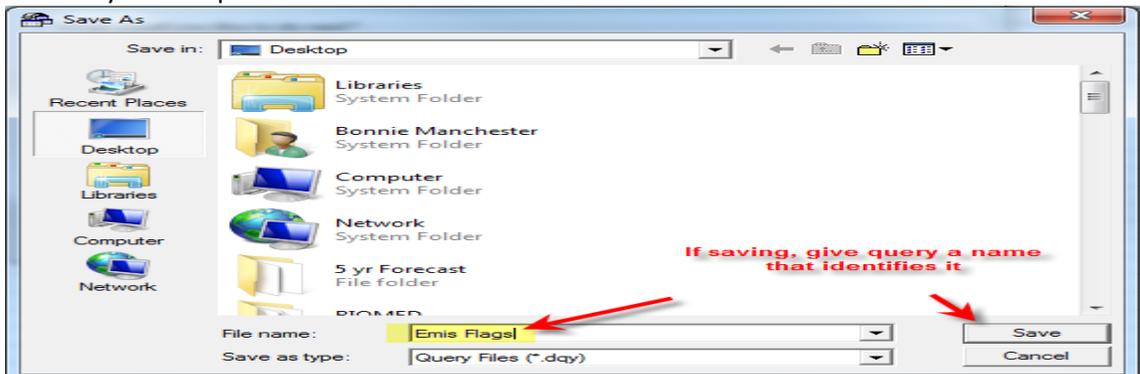
Click on "Save Query".



A "Save As" box appears.

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

Save on your computer.



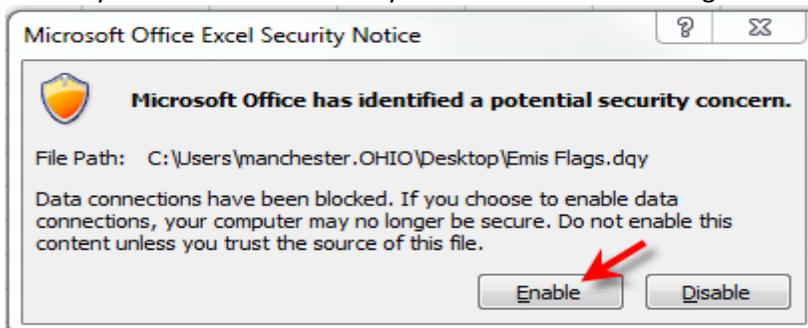
A query icon will be placed on your computer.

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.

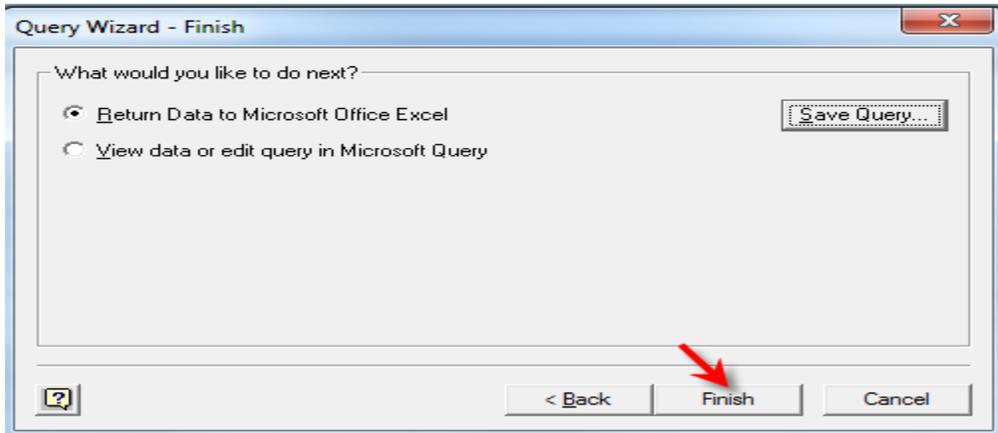


Insert your Reflections password & click OK.

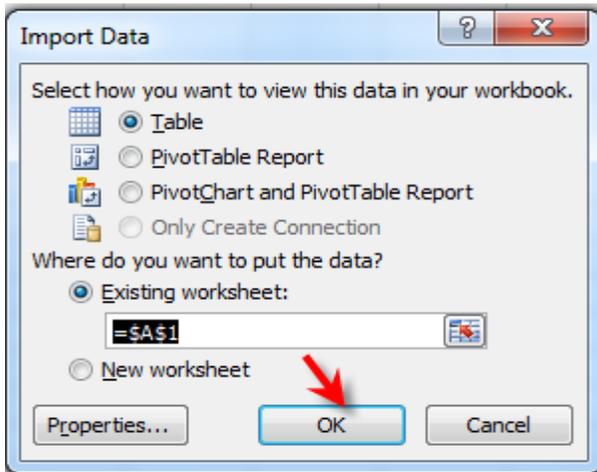
The query that you previously saved will display with current information.

.....

Click on "Finish".



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.

	A	B	C	D	E	F
1	EMPLOYEE ID	LAST NAME	FIRST NAME	EMPLOYEE REPORT TO EMIS	JOB NO	JOB STATUS
2	00000001	Bunny	Bugs	N	11	
3	00000002	Duck	Donald	Y	11	
4	00000003	Fudd	Elmer	N	11	
5	00000004	Mouse	Mickey	Y	11	
6	00000005	Pig	Porky	N	11	

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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”.

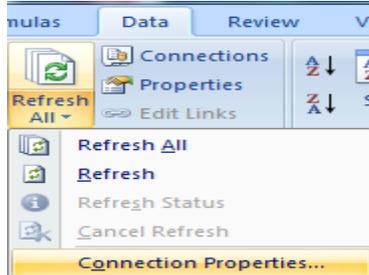


A login will appear. Type in your Reflections password & hit enter. The information will populate the spreadsheet.

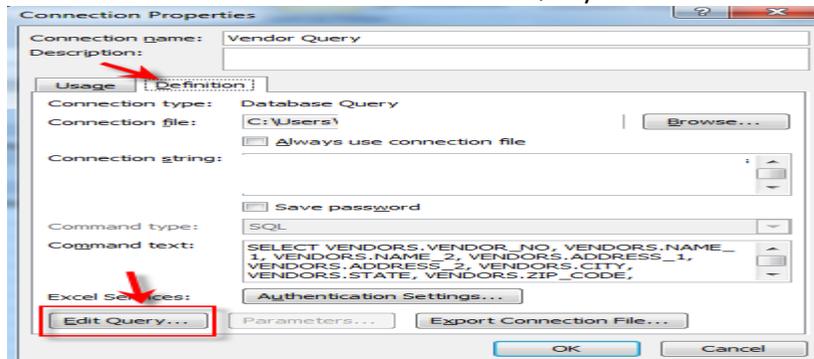
Click on the “Data” tab.

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

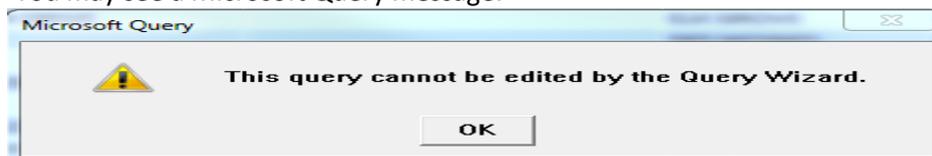
Select “Connection Properties”.



Select the “Definition” tab & click the “Edit Query” button.



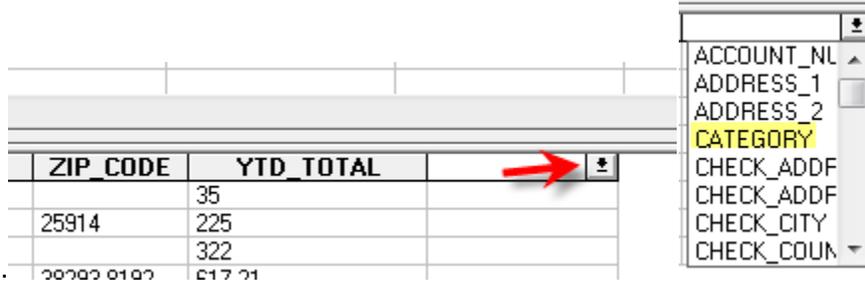
You may see a Microsoft Query message:



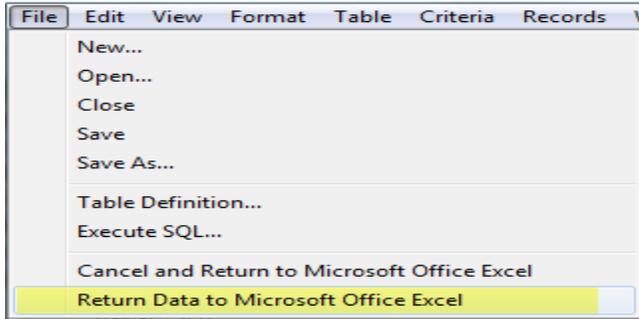
Click OK.

The query will appear in Microsoft Query format.

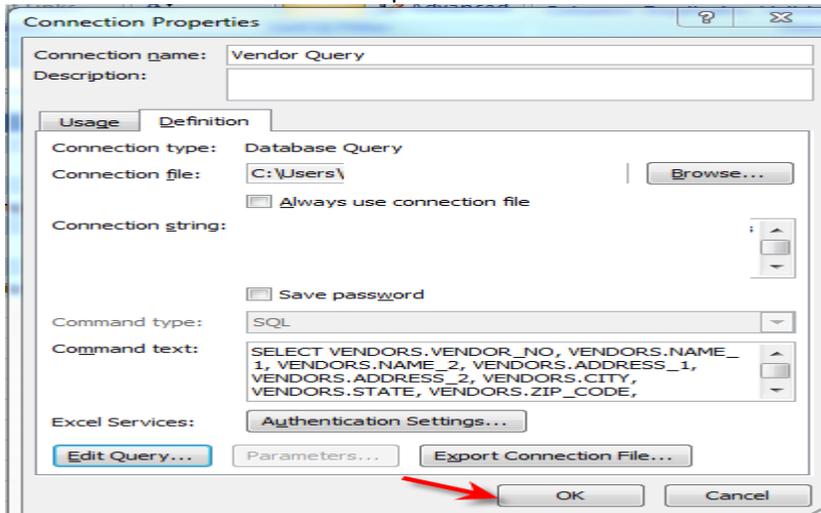
Put your cursor in the last column heading & a drop down arrow will appear. Click on the arrow to display additional records. Select columns to add.



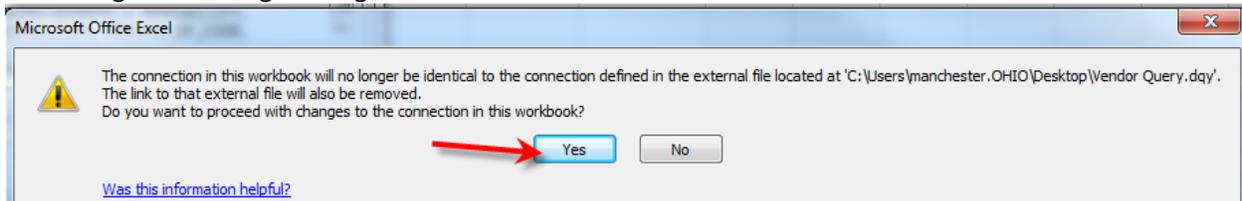
Select File>Return Data to Microsoft Office Excel



Click "OK" in the Connection Properties box



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

Server Name

User Name

Password

Command File Name

Service Parameters

Port Number

Safari InfoServer

Set Variables...

Trouble Shooting...

OK Cancel

# EXCEL TIPS

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## To Filter:

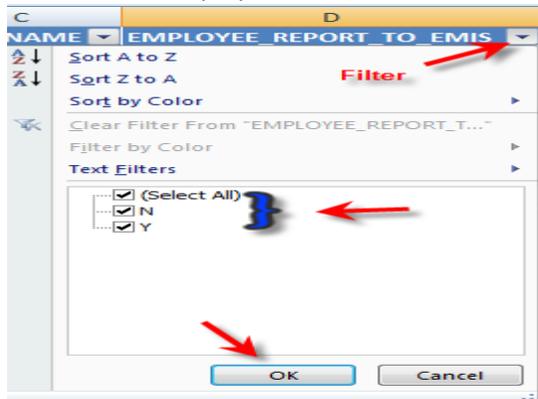
The columns are set to “Filter”. Look for the down arrow at the end of each column heading.

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.



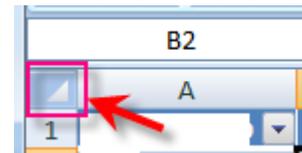
## To Sort:

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.



## To Highlight all:

Click the “Global Selector” button or Press CTRL + A.



**To Auto Adjust Column Width:**

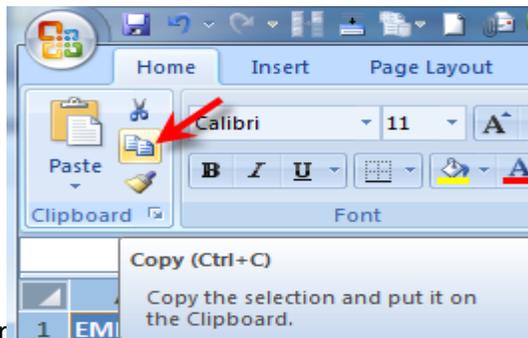
Once highlighted, you can auto adjust every column by double clicking on the line between the columns. You will see an icon like this:



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

**To Copy:**

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.



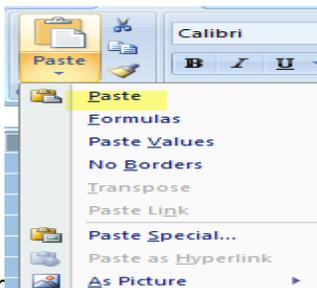
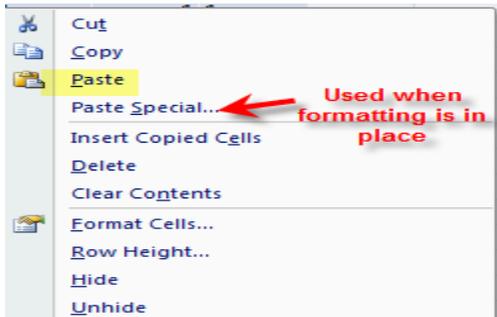
or CTRL + C

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



**To Paste:**

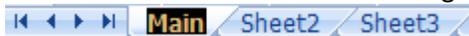
Put your cursor in the cell that you want to copy the data into. Right click on the mouse & select "Paste" or click on the Paste icon or Click CTRL + V



or 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.



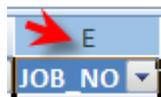
### To Zoom In or Out:

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

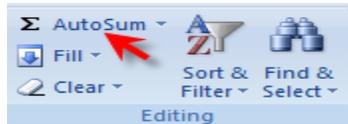


### To Sum Column:

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.



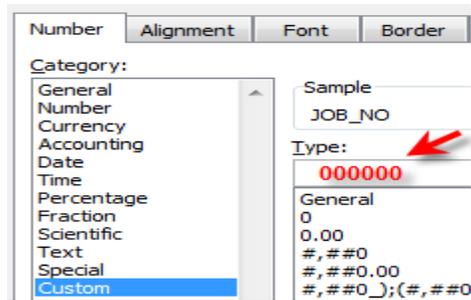
### To Create Leading Zeros:

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

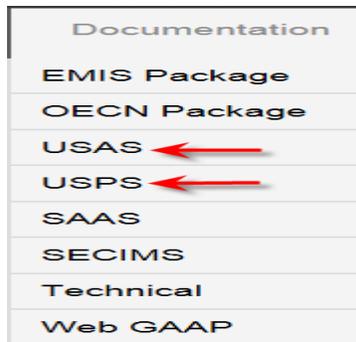
SSDT documentation can be found at:

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

Select the Documentation Tab:



Select USAS or USPS



In USAS, select the User Guide.

- [USAS User Guide](#)

Select the USAS or USPS User Guide



In USPS, select USPS Useful Procedures.

- [User Guide Section](#)
- [USPS Useful Procedures](#)

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.