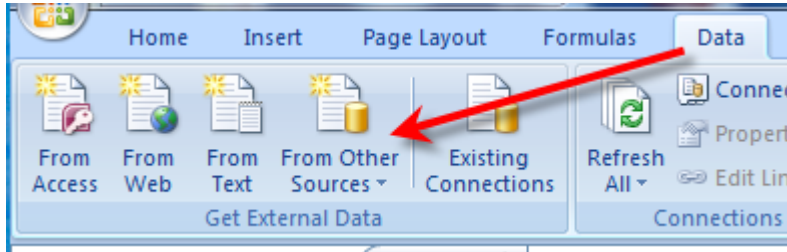
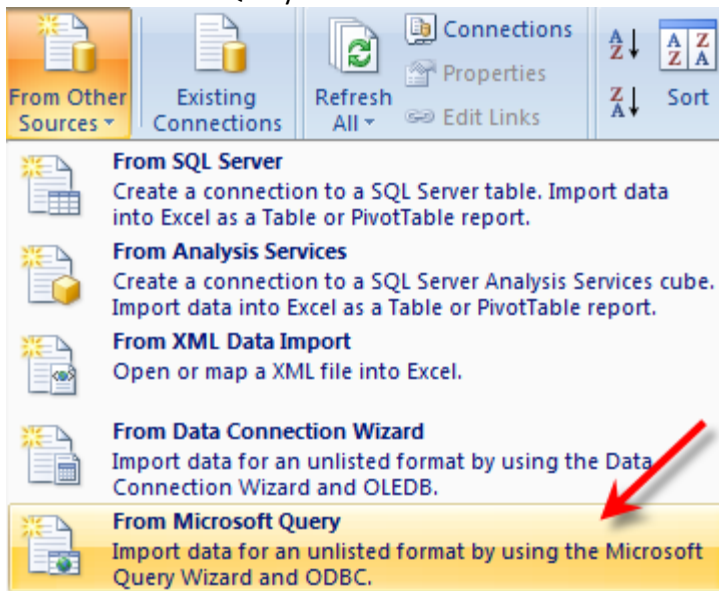


SAFARI USAS VENDOR INFORMATION

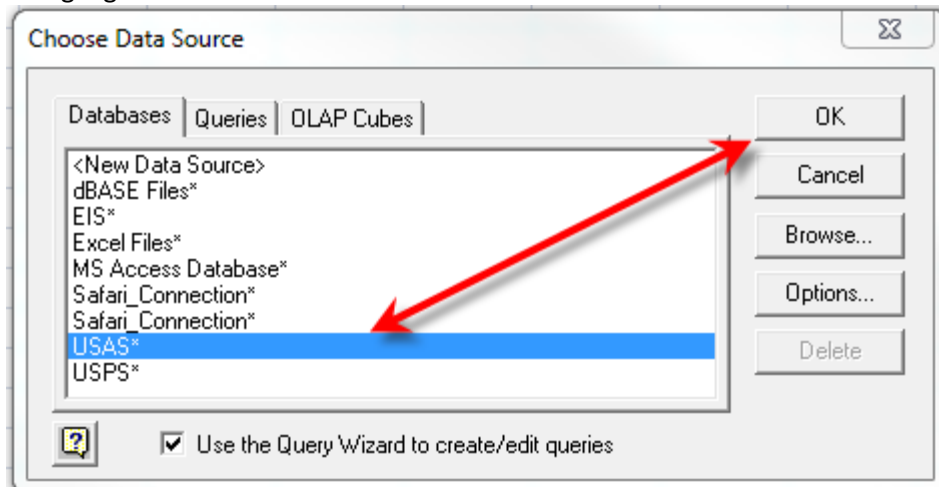
1. Open Microsoft Excel and go to the "Data" tab.
2. Select "From Other Sources" within the "Get External Data" area.



3. Select "From Microsoft Query"



4. Highlight "USAS" as the Data Source and click OK.



5. Login using your Reflections password & either click on OK or just hit "enter".

Server Connect -

Login Information

Server Name: access0.access-k12.org

User Name: manchester

Password: **Insert Reflections password**

Command File Name: oechn\$:safari usas

Service Parameters

Port Number: #23341

Safari InfoServer: udmssrv

Buttons: Set Variables..., Trouble Shooting..., OK, Cancel

6. Scroll down until you find "Vendors".

7. Click on the + sign to display the possible selections.

Query Wizard - Choose Columns

What columns of data do you want to include in your query?

Available tables and columns:

- USAS_T_4502
- USAS_T_4502_RE
- VENDOR_REC
- VENDORS**
- XREF_BUDGET_RE
- XREF_REVENUE_R

8. Select the information you would like by highlighting & pressing the > arrow or by double clicking on the field. Your selection should show in the "Columns in your query" box. Place the fields in the order you want them to display.

Query Wizard - Choose Columns

What columns of data do you want to include in your query?

Available tables and columns:

- VENDORS
 - COUNTRY
 - PHONE
 - STATUS
 - FLAG_1099
 - SSN_1099

Columns in your query:

- VENDOR_NO
- NAME_1
- NAME_2
- ADDRESS_1
- ADDRESS_2
- CITY
- STATE
- ZIP_CODE

Preview of data in selected column:

Buttons: Preview Now, Options..., < Back, Next >, Cancel

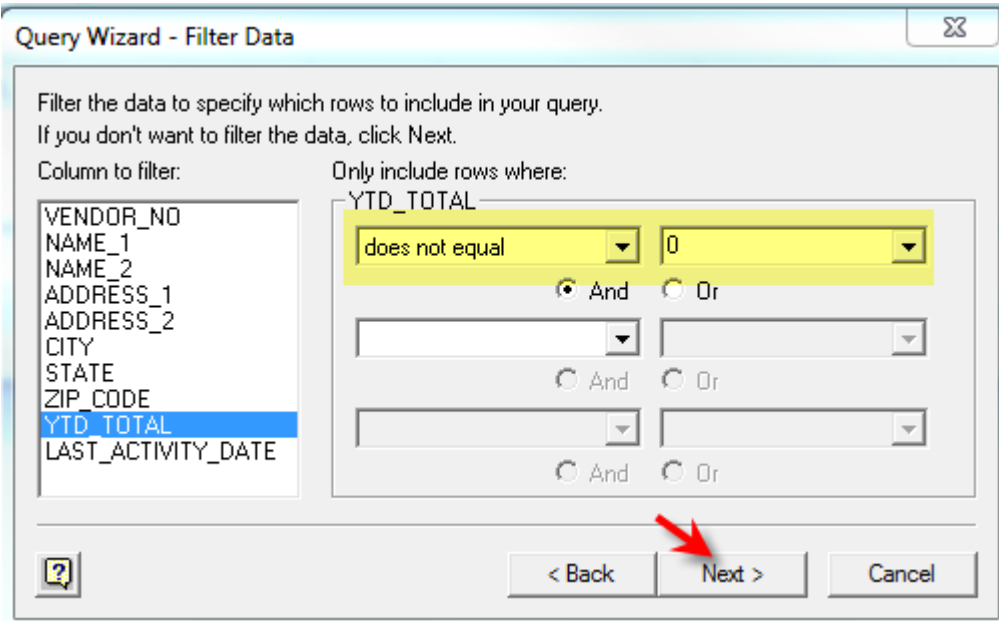
Once list is complete, click "Next"

Selections in "Columns in your query" box can be moved to a different order by using the arrows to the right of the box.

The selections will display on the excel spreadsheet in the same order that you have them here.

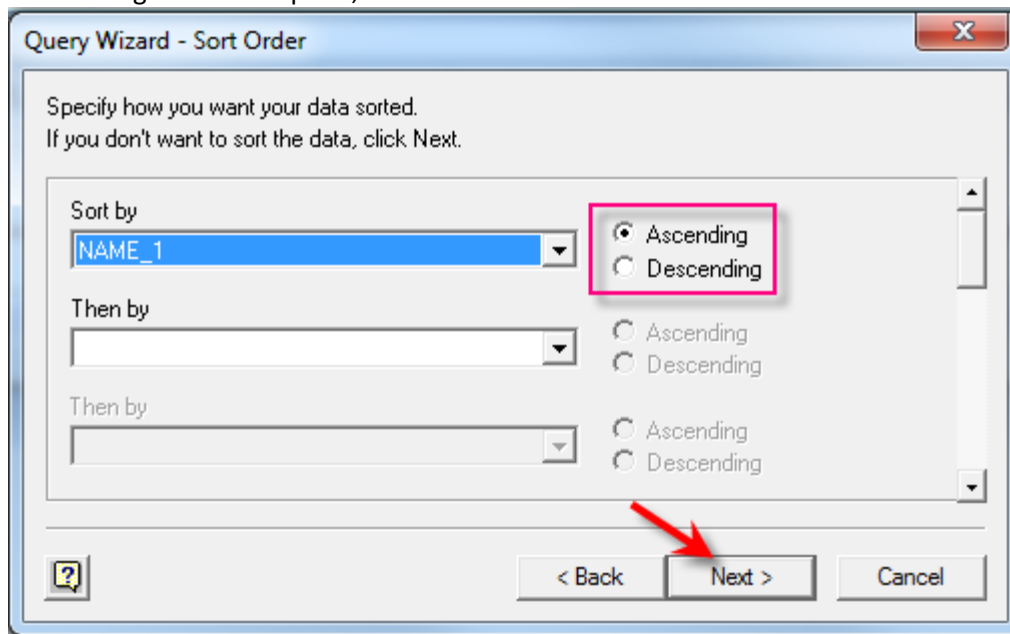
To move:
Highlight the field & use the arrow buttons to move.

9. It is a good idea to select an area that can minimize the number of records that return. If you do not select this feature, then every record (inactive and active) will be returned. In this case, we selected YTD total. We are looking for every vendor who has a YTD total above 0. Highlight YTD_TOTAL to open the selection boxes. From the drop down menu, select “does not equal”. Type the number 0 in the next box. Click “Next”.



The "Query Wizard - Filter Data" dialog box is shown. It has a title bar with a close button. The main area contains instructions: "Filter the data to specify which rows to include in your query. If you don't want to filter the data, click Next." Below this, there are two sections. The first section, "Column to filter:", contains a list box with the following items: VENDOR_NO, NAME_1, NAME_2, ADDRESS_1, ADDRESS_2, CITY, STATE, ZIP_CODE, YTD_TOTAL (highlighted in blue), and LAST_ACTIVITY_DATE. The second section, "Only include rows where:", contains a list box with "YTD_TOTAL" selected. To the right of this list box are two dropdown menus. The first dropdown menu is set to "does not equal" and the second is set to "0". Below these dropdowns are three sets of radio buttons labeled "And" and "Or". The first set has "And" selected. At the bottom of the dialog box are three buttons: "< Back", "Next >" (with a red arrow pointing to it), and "Cancel".

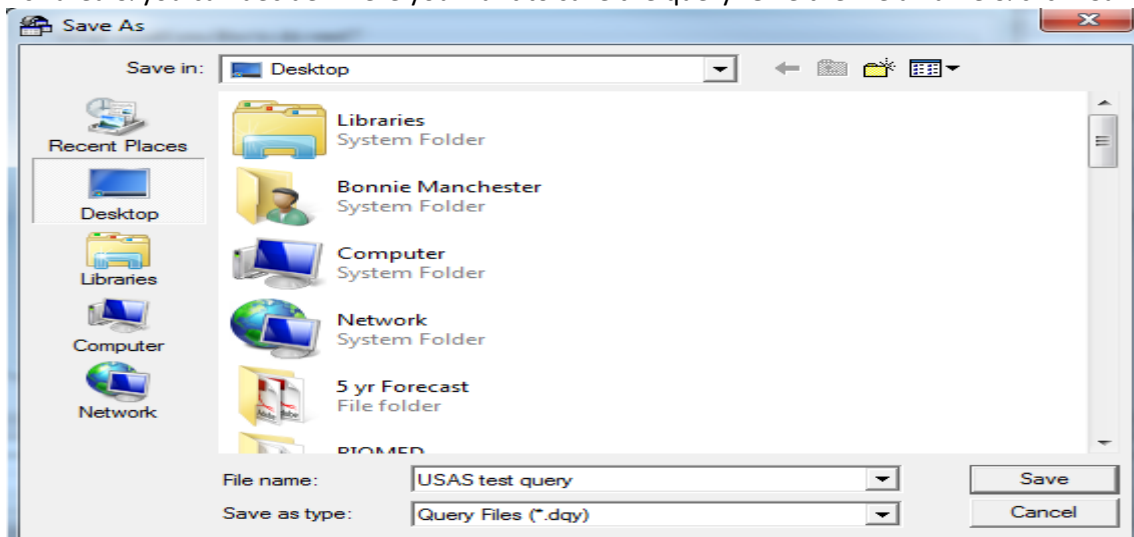
10. Select the sort order that you want to see in Excel & whether you want to view it Ascending or Descending. When complete, click “Next”.



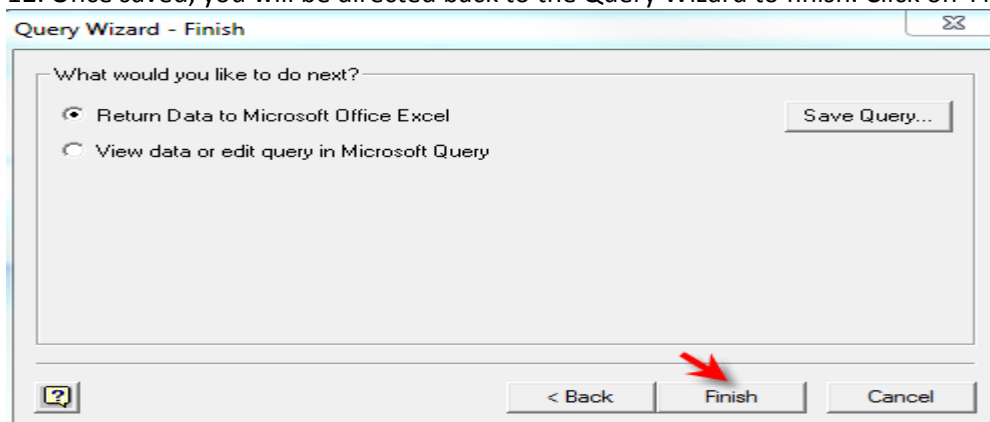
The "Query Wizard - Sort Order" dialog box is shown. It has a title bar with a close button. The main area contains instructions: "Specify how you want your data sorted. If you don't want to sort the data, click Next." Below this, there are three sections. The first section, "Sort by", contains a dropdown menu set to "NAME_1". To the right of this dropdown menu are two radio buttons labeled "Ascending" (selected) and "Descending". The second section, "Then by", contains a dropdown menu and two radio buttons labeled "Ascending" and "Descending". The third section, "Then by", contains a dropdown menu and two radio buttons labeled "Ascending" and "Descending". At the bottom of the dialog box are three buttons: "< Back", "Next >" (with a red arrow pointing to it), and "Cancel".

****At this point, if you do not want to save the Query, you can click “Finish” & “OK” on the Import Data box and the data will populate the spreadsheet.**

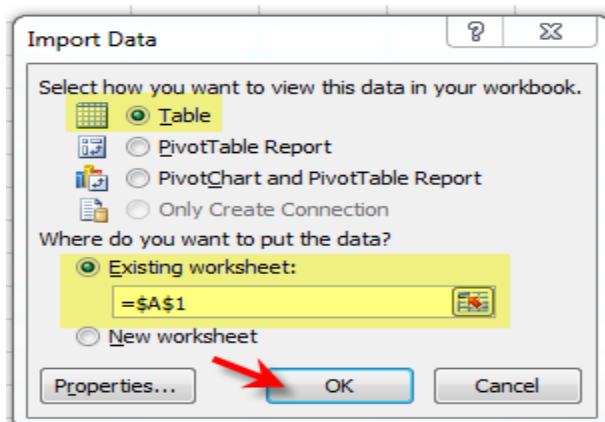
11. If this is a query that you will use over, then you can elect to “Save Query”. This will open the “Save As” area & you can decide where you want to save the query. Give the file a name & click “Save”.



12. Once saved, you will be directed back to the Query Wizard to finish. Click on “Finish”.



13. An “Import Data” box will display on the Excel spreadsheet. This box is set to create a Table & to start in the first cell. Click “OK” once verified.

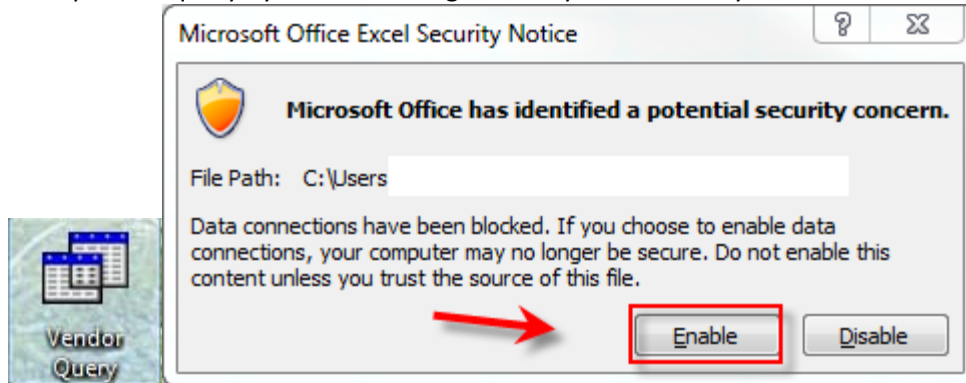


14. The information will populate the Excel spreadsheet.

15. Save the Excel spreadsheet.

To add more information to the spreadsheet:

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

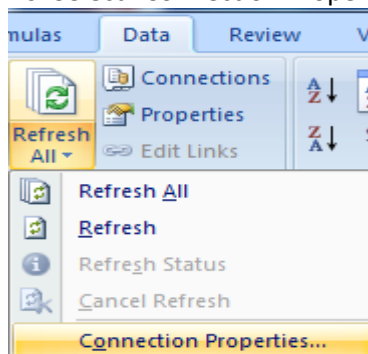


17. A login will appear. Type in your Reflections password & hit enter. The information will populate the spreadsheet.

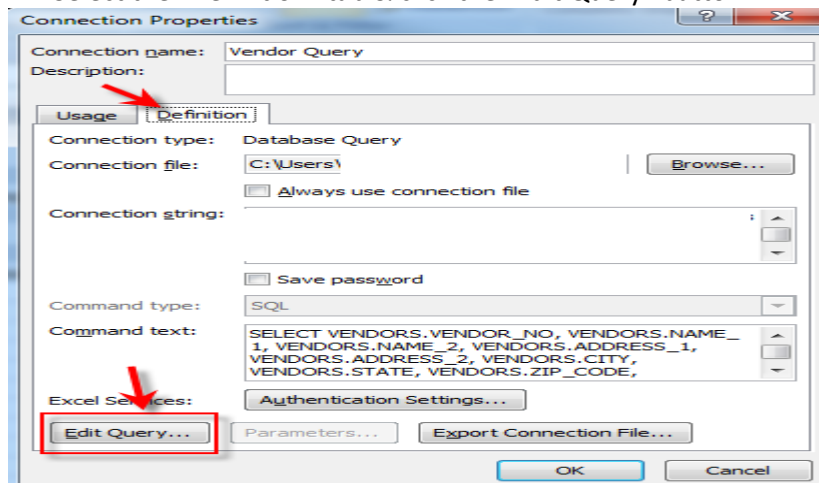
18. Click on the “Data” tab.

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

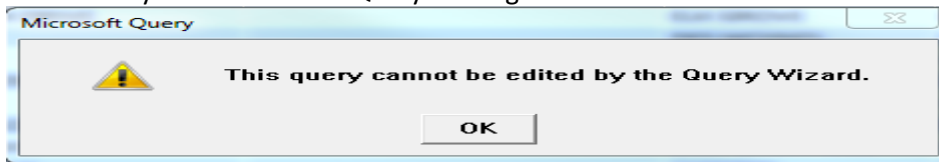
20. Select “Connection Properties”.



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



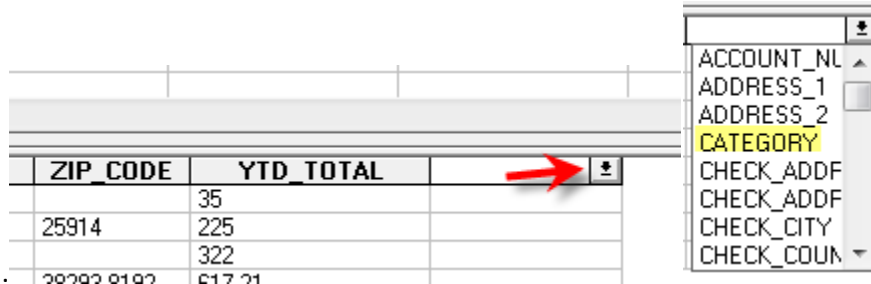
22. You may see a Microsoft Query message:



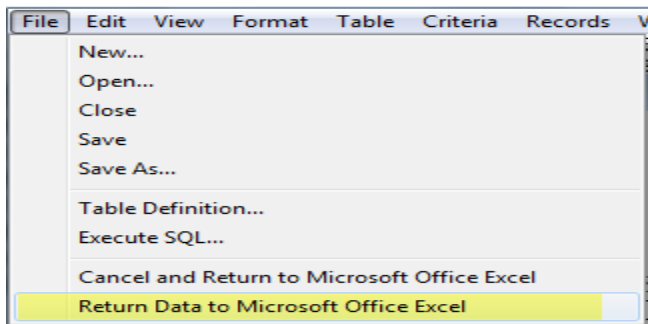
Click OK.

23. The query will appear in Microsoft Query format.

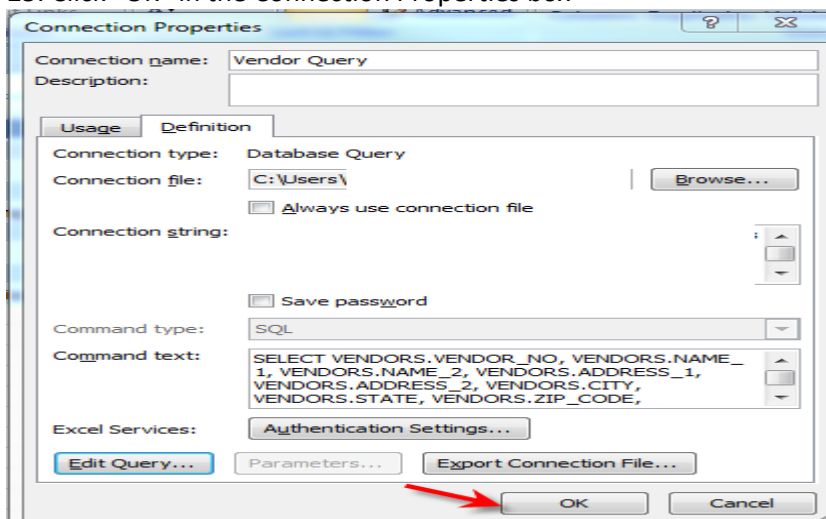
24. Put your cursor in the last column heading & a drop down arrow will appear. Click on the arrow to display additional records. Select columns to add.



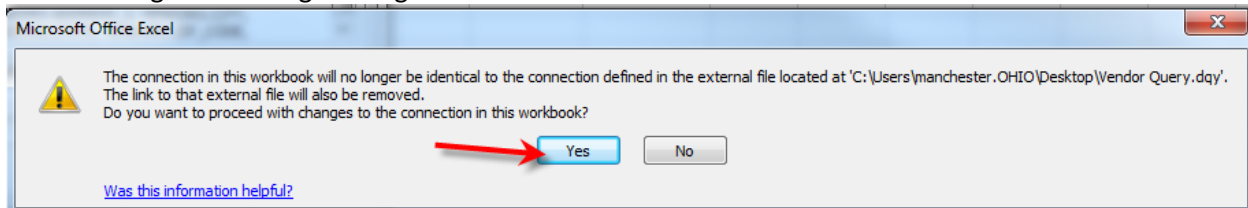
24. Select File>Return Data to Microsoft Office Excel



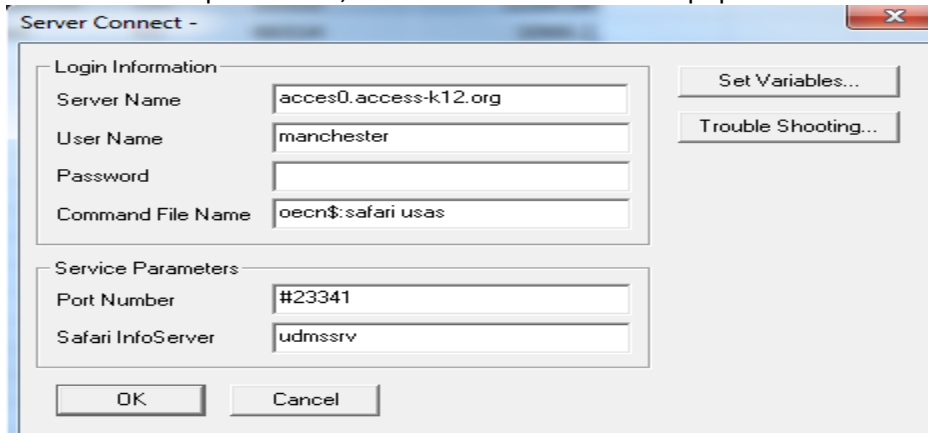
25. Click "OK" in the Connection Properties box



26. You will get a warning message. Click “Yes”.



27. 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.



SSDT documentation can be found on the Documentation tab at:

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

Select USAS>USAS User Guide>USAS User Guide>Field Definitions for UDMS-SAFARI ODBC