## SAFARI USPS DEDUCTION 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"

From Oth	er Existing	Refresh	Connections Properties Edit Links	$\begin{array}{c} \underline{A} \downarrow \\ \underline{Z} \downarrow \\ \underline{A} \downarrow \\ \underline{Z} \downarrow \\ \underline{A} \downarrow \\ \end{array}$		
From SQL Server Create a connection to a SQL Server table. Import data into Excel as a Table or PivotTable report.						
	From Analysis Services Create a connection to a SQL Server Analysis Services cube. Import data into Excel as a Table or PivotTable report.					
	From XML Data Import Open or map a XML file into Excel.					
	From Data Connection Wizard Import data for an unlisted format by using the Data Connection Wizard and OLEDB.					
	From Microsoft Q Import data for an Query Wizard and	uery 1 unlisted 1 ODBC.	format by using th	e Microsoft		

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

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

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

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

6. Scroll down until you find "DED\_REGULAR" or the deduction type that you'd like to work with. \*\*Many of the DED tables are determined by the TYPE on the DEDNAM record.

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



8. Select the information you would like by highlighting & pressing the > arrow or you can double click 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.

What columns of data do you want to include in	your query?	
Available tables and columns:	Columns in your query: EMPLOYEE_ID FULL_NAME DED_CODE ABBREVIATION CC DEDUCTION_NAME RATE BOARD_RATE FIXED_OR_PERCENT	
Preview of data in selected column:	Once list is complete, click "Next"	Canad

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 are selecting a specific deduction code to filter on:

Filter the data to specify whi If you don't want to filter the Column to filter:	ich rows to include ir data, click Next. Only include row DED_CODE —	n your query. s where:		
FULL NAME DED CODE DEDUCTION_NAME RATE FIXED_OR_PERCENT CYCLE START_DATE STOP_DATE		And      And      And      And      And		-
	J	C And	C Or Next >	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".

Query Wizard - Sort Order			23
Specify how you want your data sorted. If you don't want to sort the data, click Next.			
Sort by FULL_NAME	•	<ul> <li>Ascending</li> <li>Descending</li> </ul>	-
Then by	•	C Ascending C Descending	
Then by	Ŧ	C Ascending C Descending	•
2	< Bi	ack Next >	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.

# **SAVING & REUSING THE QUERY**

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".

Save As	and a second sec	x
Save in:	Desktop 🗾 🔶 🛗 🕶	
Recent Places	Libraries System Folder	
Desktop		
Libraries	Computer System Folder	
Computer	Network System Folder	
Network		
		-
	File name: USPS Deductions	
	Save as type: Query Files (*.dqy)  Cance	

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

Query Wizard - Finish			28
What would you like to do next? Return Data to Microsoft Office Excel View data or edit query in Microsoft Query			Save Query
	< Back	Finish	Cancel

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.

Import Data	9	23
Select how you want to view this data in yo	our wo	orkbook.
<u>Table</u>		
PivotTable Report		
PivotChart and PivotTable Rep	ort	
Only Create Connection		
Where do you want to put the data?		
Existing worksheet:		
=\$A\$1		
New worksheet		
Properties OK	Car	ncel

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.

Connection Propert	ies	?	23
Connection name:	USPS Deductions		
Description:			
Usage Definitio	n		
Connection type:	Database Query		
Connection file:	C:\Users'	<u>3</u> rowse	<u></u>
	<u>A</u> lways use connection file		
Connection string:			~
	Save password		
Command type:	SQL		-
Command text:	SELECT DED_REGULAR.EMPLOYEE_ID,		<u>~</u>
	DED_REGULAR.DED_CODE,		
1 Iv	DED_REGULAR.ABBREVIATION,		
Excel Services:	Authentication Settings		
Edit Query	Parameters		
	ок	Car	ncel

#### 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 the additional fields.



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

File	Edit	View	Format	Table	Criteria	Records	V
	New						
	Open.						Ī
	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		

25. Click "OK" in the Connection Properties box

Connection Proper	ties 💡 🔀				
Connection name: Vendor Query					
Description:		٦			
Usage Definit	ion				
Connection type:	Database Query				
Connection file:	C:\Users\				
	Always use connection file				
Connection string					
	Save pass <u>w</u> ord				
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				
	OK Cancel				

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

ſ	Microsoft (	ffice Excel
	▲	The connection in this workbook will no longer be identical to the connection defined in the external file located at 'C:\Users \Desktop\USPS Deductions.dqy'. The link to that external file will also be removed. Do you want to proceed with changes to the connection in this workbook?
		Yes No
		Was this information helpful?

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.

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

**\*\*Could use USPLOAD to import changes into USPS.** 

SSDT documentation can be found on the Documentation tab at:

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

Select USPS>USPS User Guide>USPS Useful Procedures>Field Definitions for UDMS-Safari ODBC