ODBC Installation and User Guide

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Introduction

- ODBC 4.0 Client
  - For use with Reporting Tools

Introduction

The first section of ODBC training guide describes how to install, configure, and use UniVerse ODBC drivers on client systems.
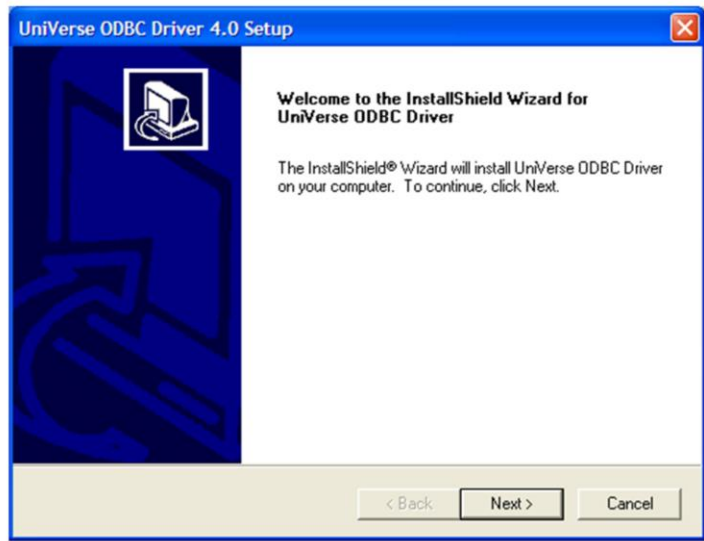
The second section of the ODBC training guide shows you how to add, delete, and/or change dictionary fields in a specific file, as well as it's accompanying reports.

The third section of the ODBC training guide will show you how to create queries in Excel, using a single file.

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ODBC 4.0 Client Installation

Installation

On your PC, download the ODBC drivers .ZIP file to your hard drive. Extract all files to a folder.

Go to the folder, then click on the folder "ODBCCLI"

Click on the folder "I386"

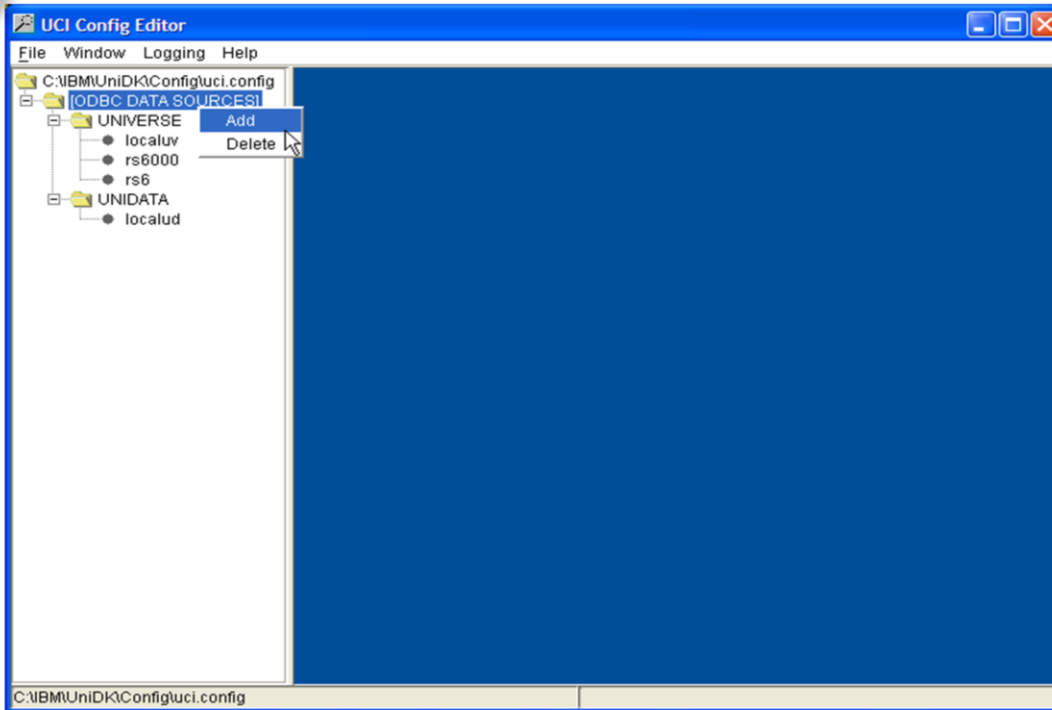Then double click on the setup.exe file to start the installation process.

Click on the "NEXT" button throughout the installation process to install the software into the default directory.

Note: You must have administrator privileges to install the drivers and data sources.

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UCI Editor

Adding New Data Source

Once the ODBC 4.0 client is installed, you will need to add the data source to the UCI Editor. This process creates the connection to your server.

Go to Start -> All Programs -> IBM U2 -> UniVerse ODBC Driver -> UCI Editor
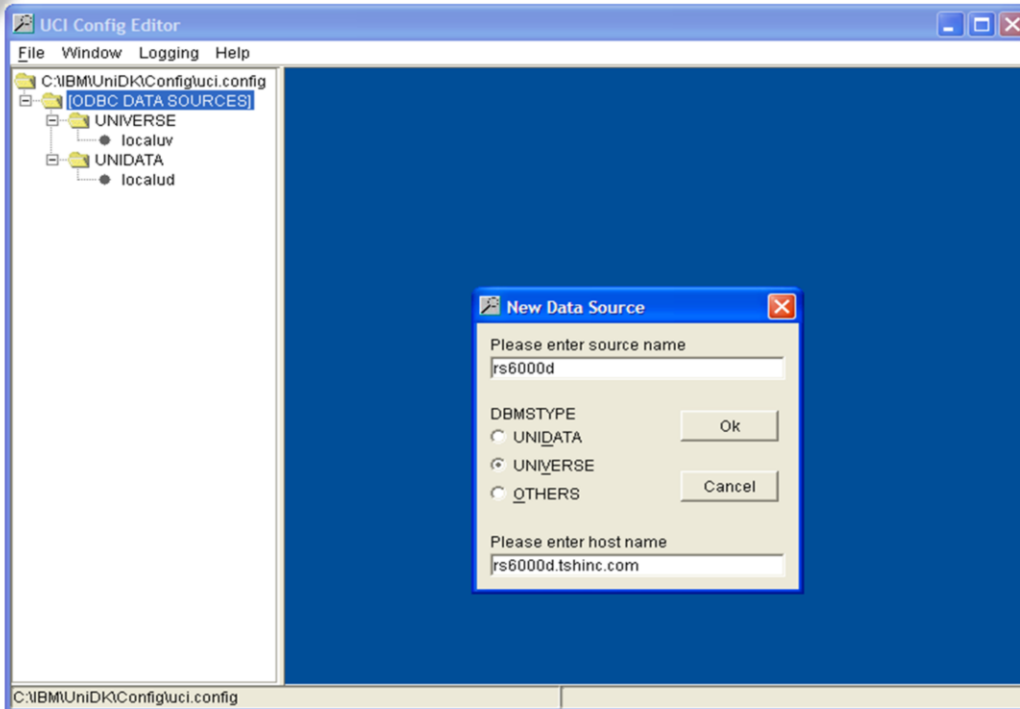
In the UCI Editor, right click on "[ODBC DATA SOURCES], then click on "ADD".

A "New Data Source" box will be displayed.

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UCI Editor

Adding New Data Source

Please enter source name: Enter your server's name.

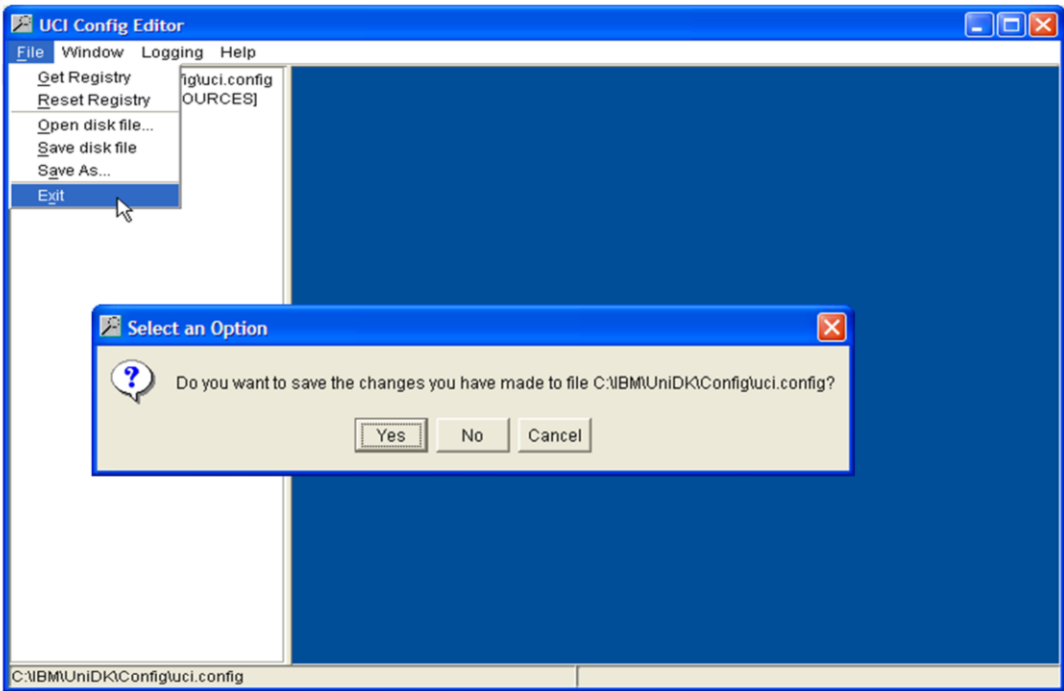**DBMSTYPE:** Select "UNIVERSE" as the database type.

Please enter host name: Enter the host name, or ip address, of your server.

When completed, click on the "OK" button. The information just added will now be showing in window titled "Data Source Adding". From here, click on "SAVE".

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UCI Editor

Adding New Data Source

To complete the process, click on File -> then click on Exit. The system will prompt:

"Do you want to save the changes you have made to file C:\IBM\UniDK\Config\uci.config"

Click on "Yes" to save the changes.

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Creating a New File Data Source Name

Creating A New File Data Source Name

This step will create a file data source name to use in reporting tools such as: Excel, Crystal Reports, and Access.

Click on Start -> click on Control Panel -> click on Administrative Tools -> click on Data Sources (ODBC)

From here, click on the tab labeled "File DSN", then click on the "ADD" button to create a new File DSN. *See example on the left of page.*
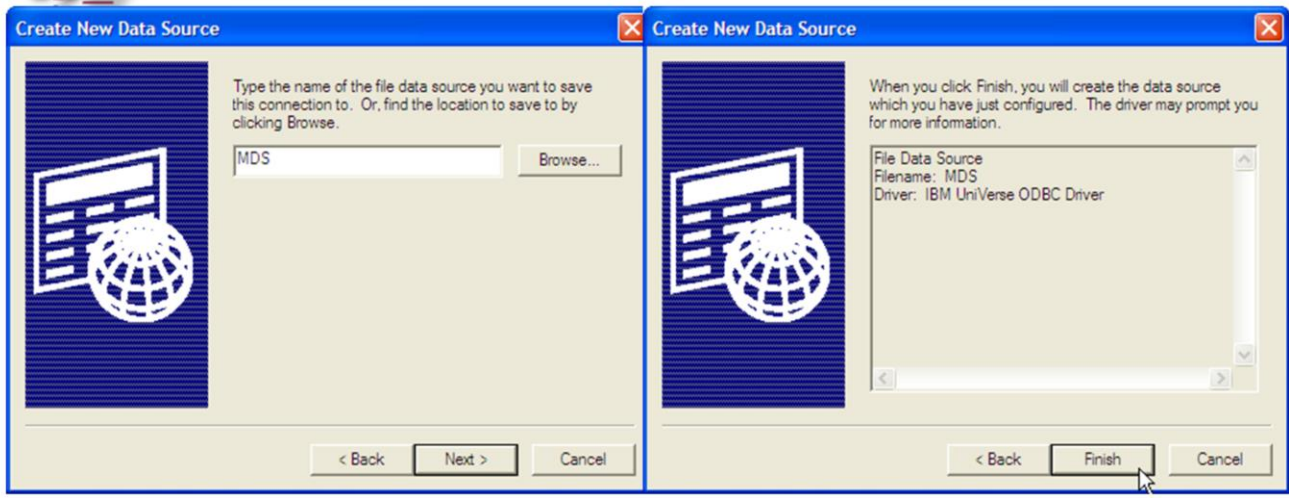
A box titled "Create New Data Source" is displayed. Click on the driver "IBM UniVerse ODBC Driver", then click on "Next".

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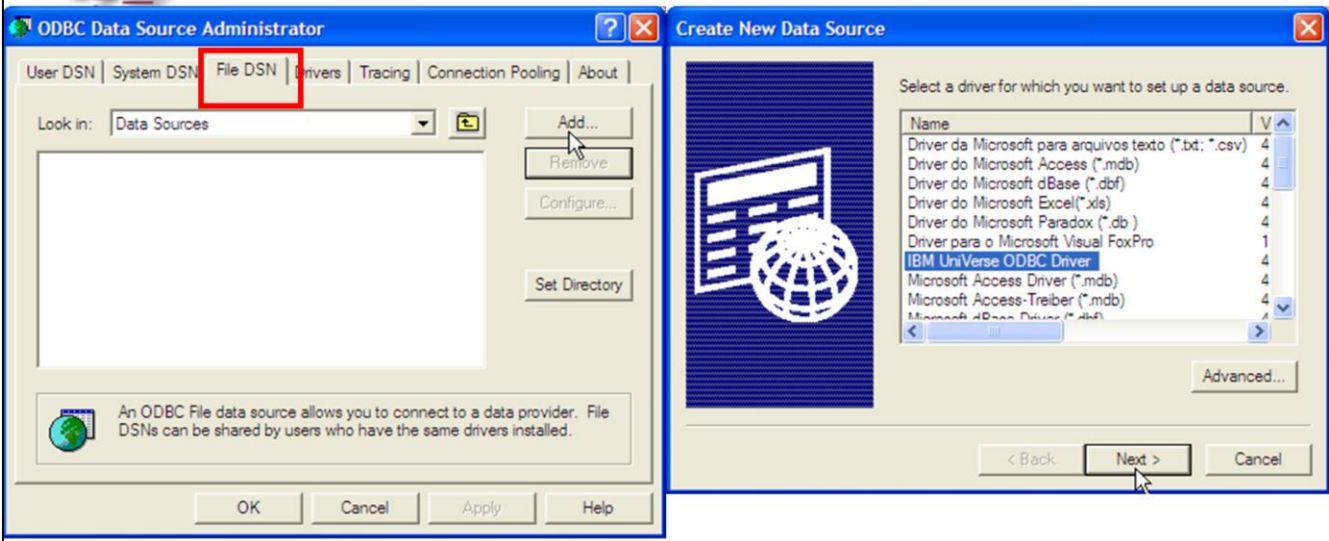
Creating a New File Data Source Name p2

Creating A New File Data Source Name

While creating the new data source, you must give it a name, type in the name of the file data source you want to save the connection to. Then click on the "Next" button.

The last screen titled "Create New Data Source" is displayed. The data source configuration that was just created is listed below. To save information, click on the "FINISH" button. To make any necessary changes, click on the "BACK" button.

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Creating a New File Data Source Name p3

Creating A New File Data Source Name
UniVerse ODBC Data Source Setup

Server: Enter the server's name (source name) that was used when creating the data source in the UCI Editor. You can click on the drop down arrow next to the field and choose your server name from the list.

Database: Enter the MDS Database name. The standard MDS Database name is: YOURACCOUNTNAME.ODBC

User: Enter the user's login

Password: Enter the user's password.

Once completed, click on the button "Test Connection". If the data source is setup correctly, you should receive the message, "Connection passed".

Next, click on "OK" to save the file data source. Once saved, you should be able to see the data source listed *(as in example on right)*.

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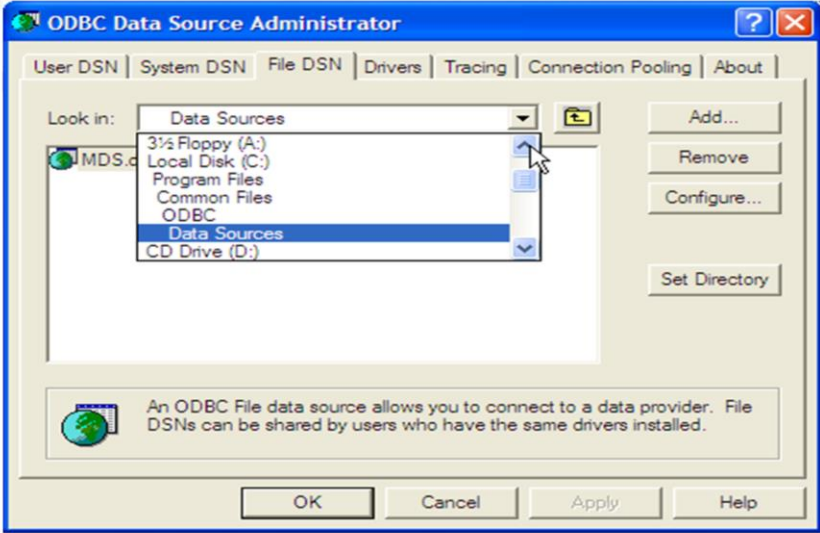
Creating A New File Data Source Name

Data Source path

The next 2 slides walks you through saving your password on the system. These steps alleviate the need for the user to enter in his or her password every time they connect to their MDS database, while using a reporting tool, such as Excel. This step is **OPTIONAL**.

Click on the drop down arrow listed as "Data Sources". Take note of the directory path that this .dsn is located in. In the example, the data source is located in C:\Program Files\Common Files\ODBC\Data Sources

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Untitled - Notepad
File Edit Format View Help
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Open
Look in:  Data Sources              [dropdown]
         MDS.dsn

My Recent
Documents

Desktop

My Documents

My Computer

My Network
              File name:    MDS.dsn                    Open
              Files of type: All Files                 Cancel
              Encoding:     Text Documents (*.txt)
                            All Files
```

```
[ODBC]
DRIVER=IBM Universe ODBC Driver
Database=BASE.12
User=johnsenr
Server=rs6000
CFGF=
DBL=No
UFI=Yes
LOC=
NLS=
RTY=No
UVN=Yes
SNT=No
SCT=No
SNQ=No
SSN=No
SFS=No
SAT=No
SDT=No
PTH=5
PSZ=10
LMX=4096
PASSWORD=12345
```

Creating A New File Data Source Name

Adding User's Password to DSN file

Go to Start -> click on Run -> type "NOTEPAD" and hit <ENTER>. The notepad program should open on the screen. Go to the path that the file data source is located.

Next, go to the drop down box titled "Files of type" and select "All Files". You should now see your data source. Click on your data source and choose "Open".

Go to the bottom of the file, and on the next line add:

PASSWORD=*enter user's password* -*See example on right*

When completed, click on "File" then "Save". You can then close out of Notepad.

Now, when using Excel or another reporting tool, you will be able to use this file data source.

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MDS ODBC Administration Menu

The MDS ODBC Administration Menu is located off the MDS Utility Menu.

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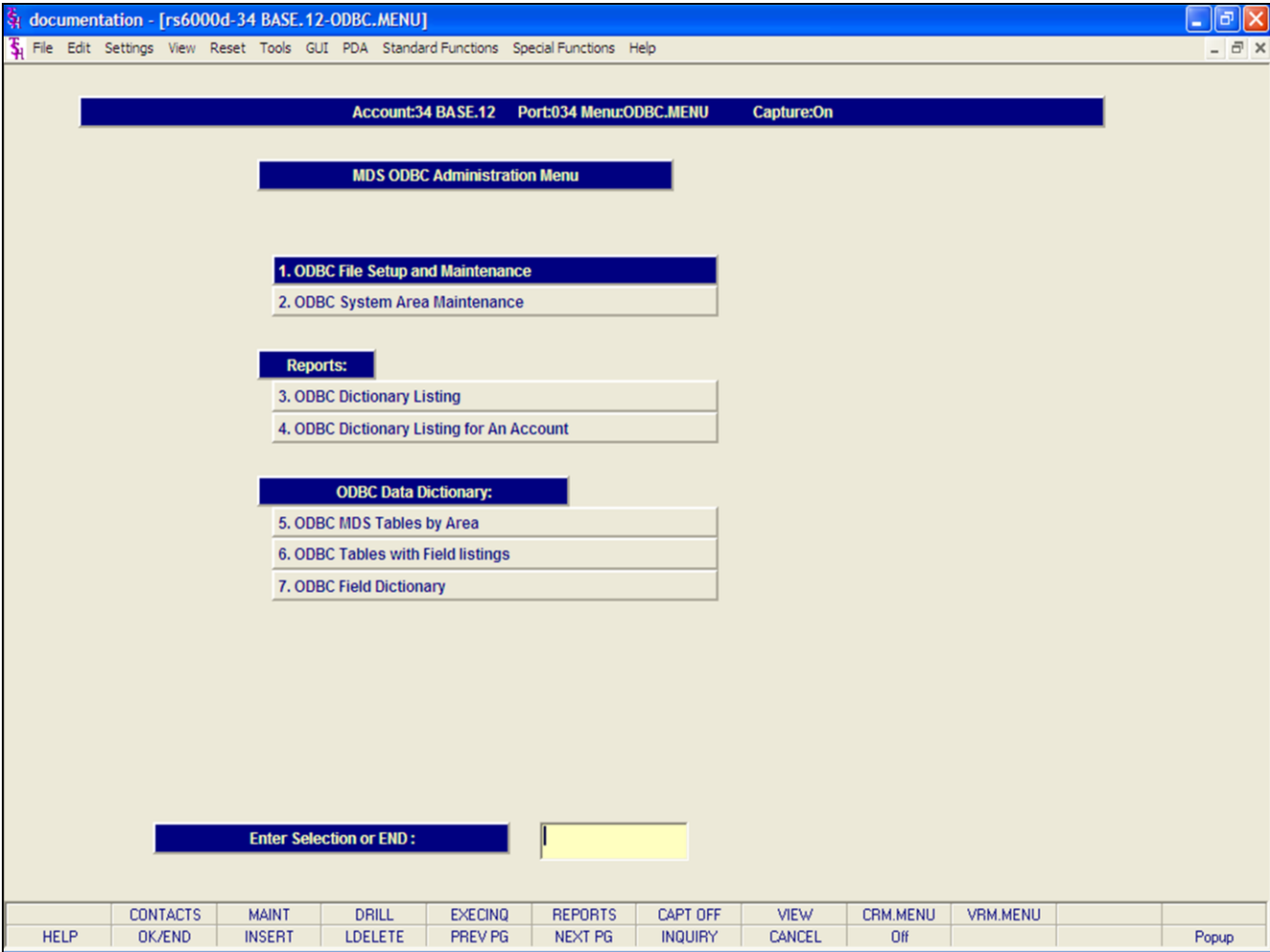
MDS ODBC Administration Menu

Menu items discussed on following pages of guide:

ODBC File Setup and Maintenance

Reports
ODBC Dictionary Listing
ODBC Dictionary Listing for an Account

ODBC Data Dictionary
ODBC MDS Tables by Area
ODBC Tables with Field Listings
ODBC Field Dictionary

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ODBC File Setup and Maintenance

Overview

In this program, you can add, change, and/or delete fields and files for ODBC accessibility. MDS provides 1 standard ODBC account, which only TSH personnel have access to change. If changes need to be made, an additional ODBC account can be created. Changes that need to be done, by your staff, would only be done on this additional account.

In this example we will make a change to a existing field.

ODBC Account – Enter the ODBC account and hit <ENTER>. The standard MDS Database name is: YOURACCOUNTNAME.ODBC

Data Account – Enter the data account and hit <ENTER>. This is your account name.

Data Filename – Enter the file name that you wish to change.

All of the dictionaries for the selected file are displayed. To change a dictionary, just click on the dictionary name or type the corresponding number in and hit <ENTER>.

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ODBC File Setup and Maintenance

Changing a File continued

You are now on that field, see above. You can change the field you are on, or hit <ENTER> to advance to the next field. You may also click on any field to just change that field.

MDS Field Name - Enter the dictionary name. You may enter NEW for temporary dictionaries (NOT for ODBC definition).

ODBC Field Name - Enter the field name for ODBC or the temporary dictionary name.

Fld - Enter the field attribute number for this field.

Description - Enter Description of this field.

MV - If this field is multi-valued, enter M to make sure the ODBC processing recognizes this field as multi-valued.

Jus – Justification; R – Right, L – Left, RN – Right Numeric.

Len - Enter the length of this field.

Conversion Correlative - Enter the conversion code to use. Valid codes include date conversions (D , D2/ , DY, etc.), Numeric conversions (MR2 , MR2,M , MR2 , etc.), Text extraction (T1,5 , T10 , etc.),

Group extraction (G*1, G2*1 , etc.), File translation (Tfilename;X;1;1).

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ODBC File Setup and Maintenance

Saving Changes

When completed making changes, click on the "OK/END" button, or hit <F2>, to go to the bottom of the screen.

ENTER LINE# TO CHANGE,ADD,DELETE TO DELETE,0 TO ACCEPT:

To update your changes, click on the "Update" button, or hit Shift+<F1>.

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ODBC File Setup and Maintenance

Adding a New File

If there is a file on the system, that has not been added to your ODBC database, you can enter it in the same ODBC Field Maintenance screen.

ODBC Account – Enter the ODBC account and hit <ENTER>. The standard MDS Database name is: YOURACCOUNTNAME.ODBC

Data Account – Enter the data account and hit <ENTER>. This is your account name.

Data Filename – Enter the file name that you wish to add.

The system will prompt:

Would you like to setup *NEWFILENAME* for ODBC (Y/N)?:

Enter "Y" and hit <ENTER>.

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ODBC File Setup and Maintenance

Adding a New File

To select all fields to be added for usage, click on the button "Sel ALL" or hit the Shift+F1 function key. You may also click on the MDS Field Name to choose each field separately.

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ODBC File Setup and Maintenance

Adding a New File

When all fields are selected, you can deselect a single field, by clicking on the MDS Field Name.

To deselect all fields, click on the button labeled, "UnSel All", or hit the Shift+F2 function key.

ENTER LINE # TO CHANGE,DELETE TO DELETE, 0 TO ACCEPT:

When you are done selecting the fields, you can click on the "OK/END" button to save your changes.

Screen fields:

Data Account: DEMO.12.ODBC

Data Filename: RELEASE.XREF

MDS   ODBC   Field   Selection

Ln#	MDS Field Name	Conversion	MV	Jus	Len
	Fld	Conversion			
Description					
1	A.CUST.NO			L	13
	0				
EXTERNAL CUST#		F;0;(TRELEASE;X;2;2)			
2	BLANK	C;C( )		L	10
	0				
3	BULK.PICKER			L	10
	0				
		TRELEASE;X2;;101			
4	CO#			RN	2
	0				
COMPANY #		T1,2			

ENTER LINE # TO CHANGE,ADD,DELETE TO DELETE,0 TO ACCEPT : XXXXXX

Sel All   UnSel All
HELP   OK/END   INSERT   LDELETE   PREV PG   NEXT PG   INQUIRY   CANCEL   Off   Popup

Notes:

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Customer Reporting System   19

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ODBC Dictionary Listing for a File

This report will generate a listing of all ODBC dictionary fields for an ODBC file.

Enter ODBC Account Name (i.e. MDS.ODBC) – Enter your ODBC account name and hit <ENTER>. The standard MDS Database name is: YOURACCOUNTNAME.ODBC

Enter ODBC File Name – Enter the ODBC file name, then hit <ENTER>.

Sort Dictionary by (N)umber or (A)lphabetically – Enter a "N" to sort the dictionary fields on the report by their corresponding number. Enter "A" to sort the dictionary fields on the report alphabetically.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Hit <ENTER> to generate the report. Remember: if Report Capture is enabled, then the report will be generated there.

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DICTIONARY LISTING FOR CUST.MAST ON ODBC ACCOUNT: DEMO.12.ODBC      PAGE:    1

Field Name            FLD# Description                    Conv    Just Len Original Dict

SINGLE VALUED FIELDS:

# SHIP                 12 NO. OF SHIPTO'S                         RN    3 #.SHIP
ACC_PART              39 ACCEPTS PARTIAL SHIPMENT FLAG           L     1 ACC.PART
ACC_SUB               40 ACCEPTS SUBSTITUTIONS FLAG              L     1 ACC.SUB
ADMIN_FEE%            59 ADMINISTRATION FEE PERCENTAGE           R     4 ADMIN.FEE%
ADR1                   2 Customer Address Line One               L    25 ADR1
ADR2                   3 Customer Address Line two               L    25 ADR2
ADR3                   4 Customer Address Line three             L    25 ADR3
AR_BAL                30 TOTAL A/R BALANCE  (MD2)        MR2,     RN   12 AR.BAL
AR_CONT                9 Accounts Receivable contact name. Maximu L    20 AR.CONT
                         m of 20 characters This name, if entered
                         , will be displayed on the Accounts Rece
                         ivable credit manager inquiry.
A_CUSTNO              13 ALPHA CUST.NAME MAX 13 ALPHA NUMERIC     LA   13 A_CUSTNO
A_CUST_NO             13 ALPHA CUST NUMBER MAX 13 ALPHA NUMERIC   L    13 A.CUST.NO
BACKORD               38 Accept Backorders (Y/N) A 'N' in this fi L     1 BACKORD
                         eld means that the order entry sub-    s
                         ystem will cancel any quantities which w
                         ould normallybecome backorders for this
                         customer.
CALL_DAY             193 CALL DAY OF THE WEEK                     R     1 CALL.DAY
CHARGE_FRT           149 the Freight Charge flag is used to flag  L     1 CHARGE.FRT
                         thosecustomers who you charge freight.
                         Allowable entriesare "Y" or "N".
CHARGE_FRT_PCT       150 The Freight Charge Percent field allows  R     5 CHARGE.FRT.PCT
                         the operatorto enter an amount of the su
                         rcharge for freight.  If apercentage amo
                         unt is entered here it will becalculated
                         with any other freight charge amount th
                         athas been manually entered at the time
                         of Verification,One step, and Credit Mem
                         o entry.

CITY                   5 Customer City Name Maximum of 25 Charact L    25 CITY
                         ers
COMPANY               72 COMPANY FOR ORDER ENTRY                  R     2 COMPANY
CONTRACT_NO           45 Contract Account Number Maximum of 13 ch L    13 CONTRACT.NO
                         aractersthe contract number is used in c
                         onjunction with        contract price log
                         ic.
COUNTRY_CODE         190 COUNTRY CODE                             L     3 COUNTRY.CODE
CREATE_DT             18 CREATION DATE                   D2/      R     9 CREATE.DT
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MDS ODBC Data Dictionary Guide

documentation - [rs6000d-2804 demo.12-ODBC.FILE.LIST.ALL$1]

File Edit Settings View Reset Tools GUI PDA Standard Functions Special Functions Help

1. Enter ODBC Account Name (ie. MDS.ODBC)   DEMO.12.ODBC

2. Sort Dictionary by (N)umber or (A)lphabetically   A

Press <RETURN> to Process Report, Line# to Change, or ABORT :   XXXXXX

| HELP | OK/END | INSERT | LDELETE | PREV PG | NEXT PG | INQUIRY | CANCEL | | | | Popup |

ODBC Dictionary Listing for an Account

This report will generate a listing of all ODBC dictionary files, and its' fields, for an ODBC account.

Enter ODBC Account Name (i.e. MDS.ODBC) – Enter the ODBC account name and hit <ENTER>. The standard MDS Database name is: YOURACCOUNTNAME.ODBC
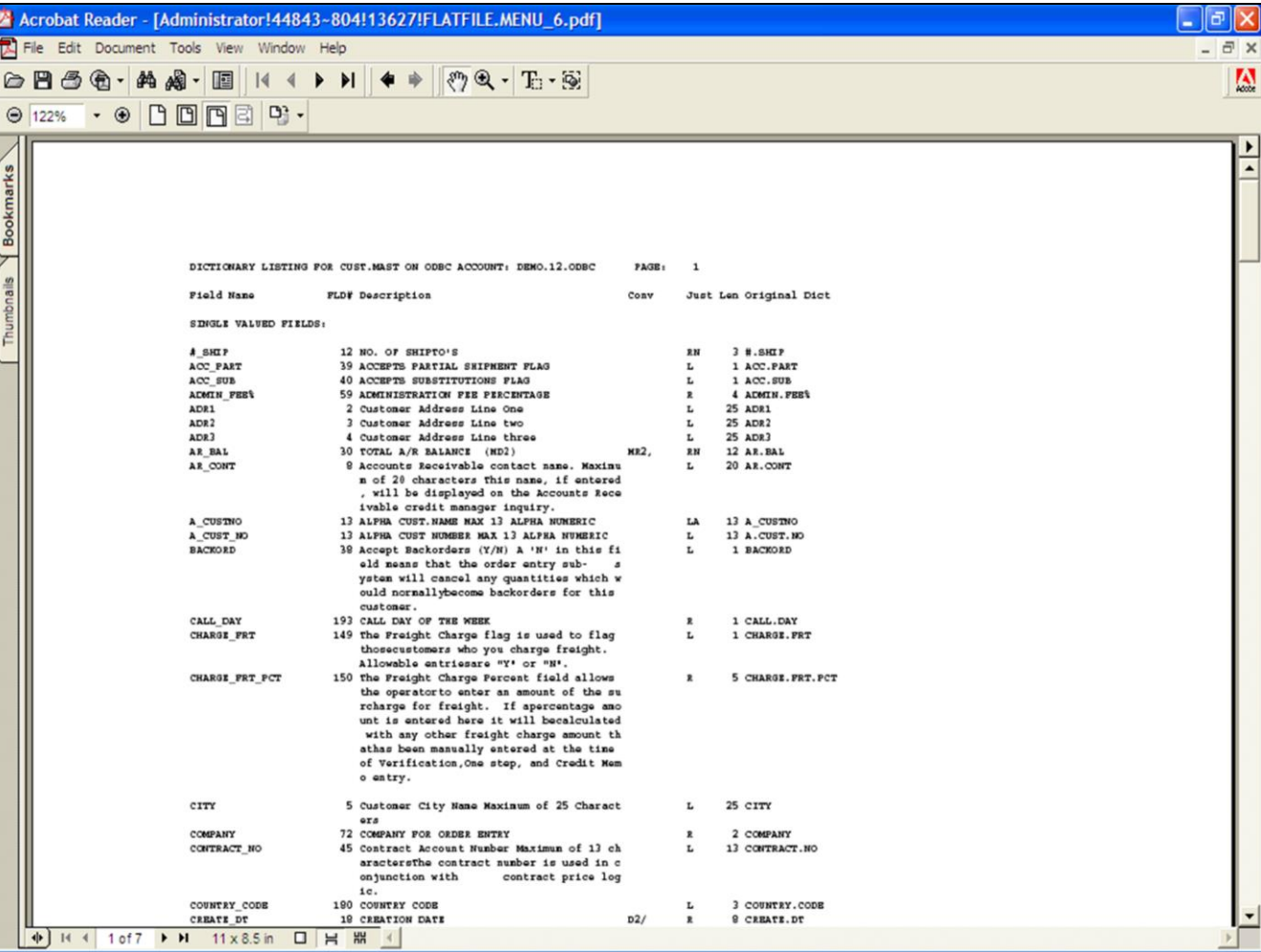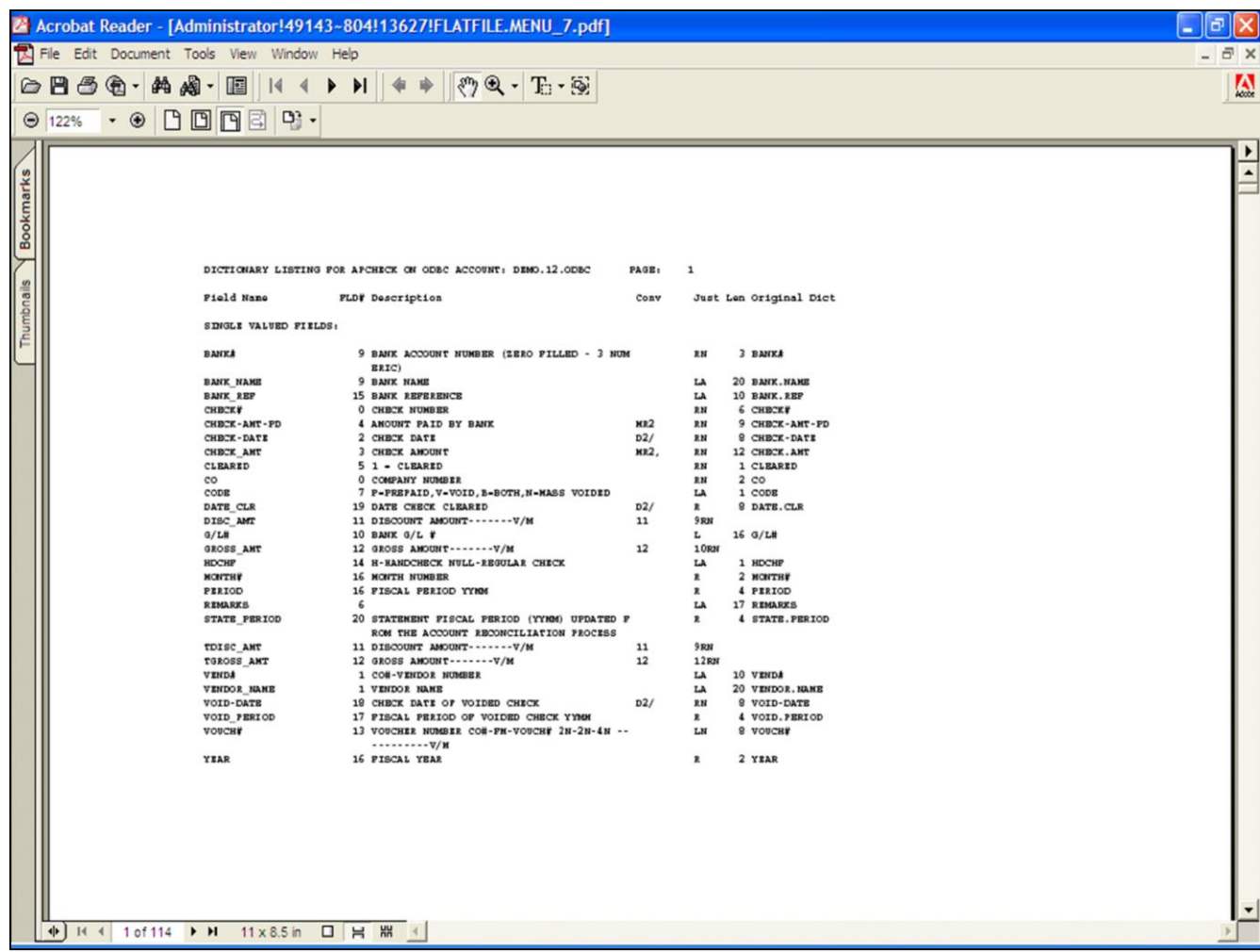
Sort Dictionary by (N)umber or (A)lphabetically - Enter a "N" to sort the dictionary fields on the report by their corresponding number. Enter "A" to sort the dictionary fields on the report alphabetically.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Hit <ENTER> to generate the report. Remember: if Report Capture is enabled, then the report will be generated there.
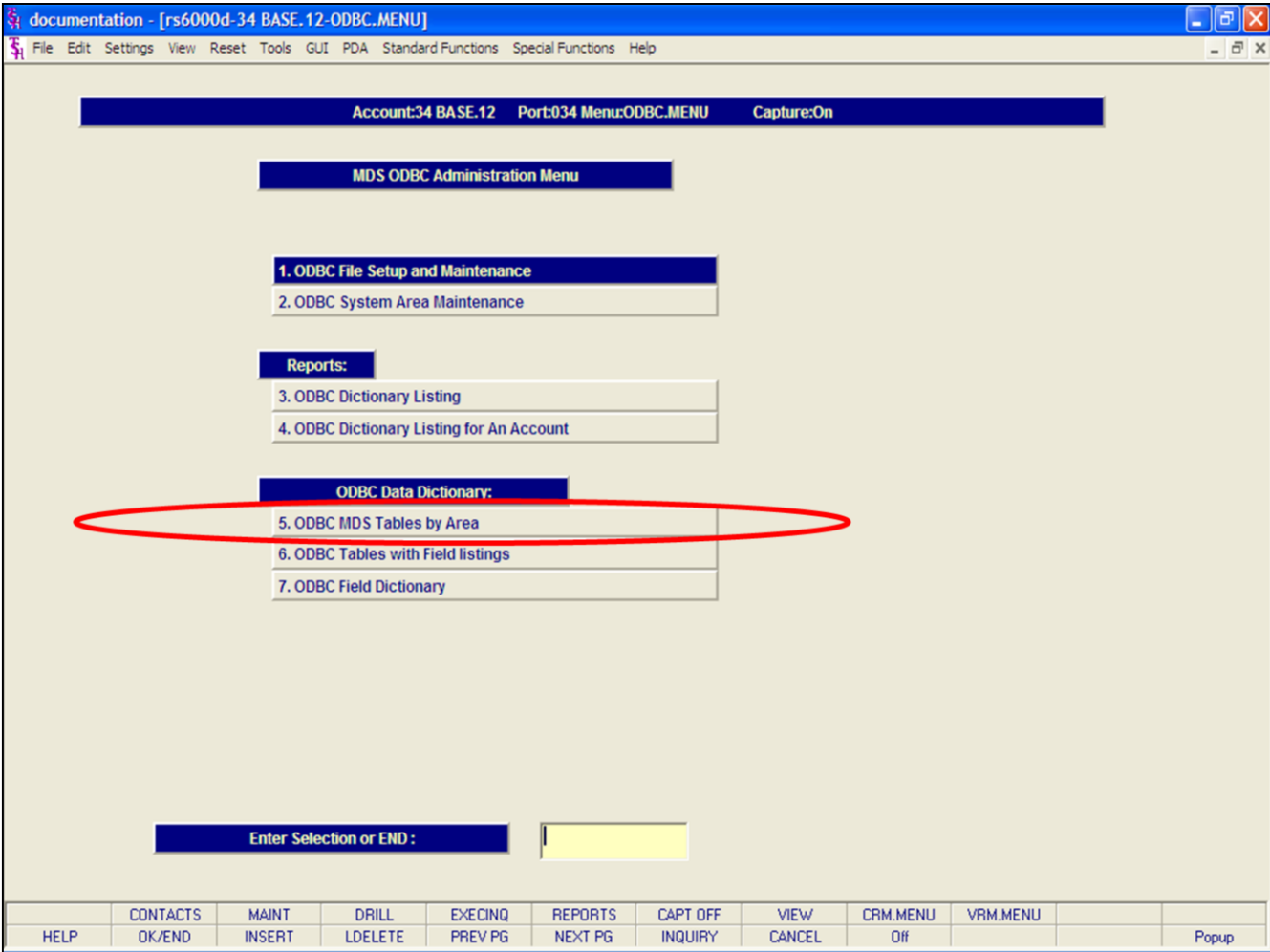
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Shown above is an example of the report.

```
DICTIONARY LISTING FOR APCHECK ON ODBC ACCOUNT: DEMO.12.ODBC        PAGE:    1

Field Name            FLD# Description                      Conv    Just Len Original Dict

SINGLE VALUED FIELDS:

BANK#                   9 BANK ACCOUNT NUMBER (ZERO FILLED - 3 NUM        RN      3 BANK#
                          ERIC)
BANK_NAME              9 BANK NAME                                  LA     20 BANK.NAME
BANK_REF              15 BANK REFERENCE                             LA     10 BANK.REF
CHECK#                 0 CHECK NUMBER                               RN      6 CHECK#
CHECK-AMT-PD           4 AMOUNT PAID BY BANK               MR2      RN      9 CHECK-AMT-PD
CHECK-DATE             2 CHECK DATE                        D2/      RN      8 CHECK-DATE
CHECK_AMT              3 CHECK AMOUNT                      MR2,     RN     12 CHECK.AMT
CLEARED               5 1 = CLEARED                                RN      1 CLEARED
CO                     0 COMPANY NUMBER                             RN      2 CO
CODE                   7 P=PREPAID,V=VOID,B=BOTH,N=MASS VOIDED      LA      1 CODE
DATE_CLR              19 DATE CHECK CLEARED                D2/      R       8 DATE.CLR
DISC_AMT              11 DISCOUNT AMOUNT-------V/M                  11     9RN
G/L#                  10 BANK G/L #                                 L      16 G/L#
GROSS_AMT             12 GROSS AMOUNT-------V/M                     12    10RN
HDCHF                 14 H=HANDCHECK NULL=REGULAR CHECK             LA      1 HDCHF
MONTH#                16 MONTH NUMBER                               R       2 MONTH#
PERIOD                16 FISCAL PERIOD YYMM                         R       4 PERIOD
REMARKS                6                                            LA     17 REMARKS
STATE_PERIOD          20 STATEMENT FISCAL PERIOD (YYMM) UPDATED F   R       4 STATE.PERIOD
                          ROM THE ACCOUNT RECONCILIATION PROCESS
TDISC_AMT             11 DISCOUNT AMOUNT-------V/M                  11     9RN
TGROSS_AMT            12 GROSS AMOUNT-------V/M                     12    12RN
VEND#                  1 COM-VENDOR NUMBER                          LA     10 VEND#
VENDOR_NAME            1 VENDOR NAME                                LA     20 VENDOR.NAME
VOID-DATE             18 CHECK DATE OF VOIDED CHECK        D2/      RN      8 VOID-DATE
VOID_PERIOD           17 FISCAL PERIOD OF VOIDED CHECK YYMM         R       4 VOID.PERIOD
VOUCH#                13 VOUCHER NUMBER COM-FM-VOUCH# 2N-2N-4N --   LN      8 VOUCH#
                          ---------V/M
YEAR                  16 FISCAL YEAR                                R       2 YEAR
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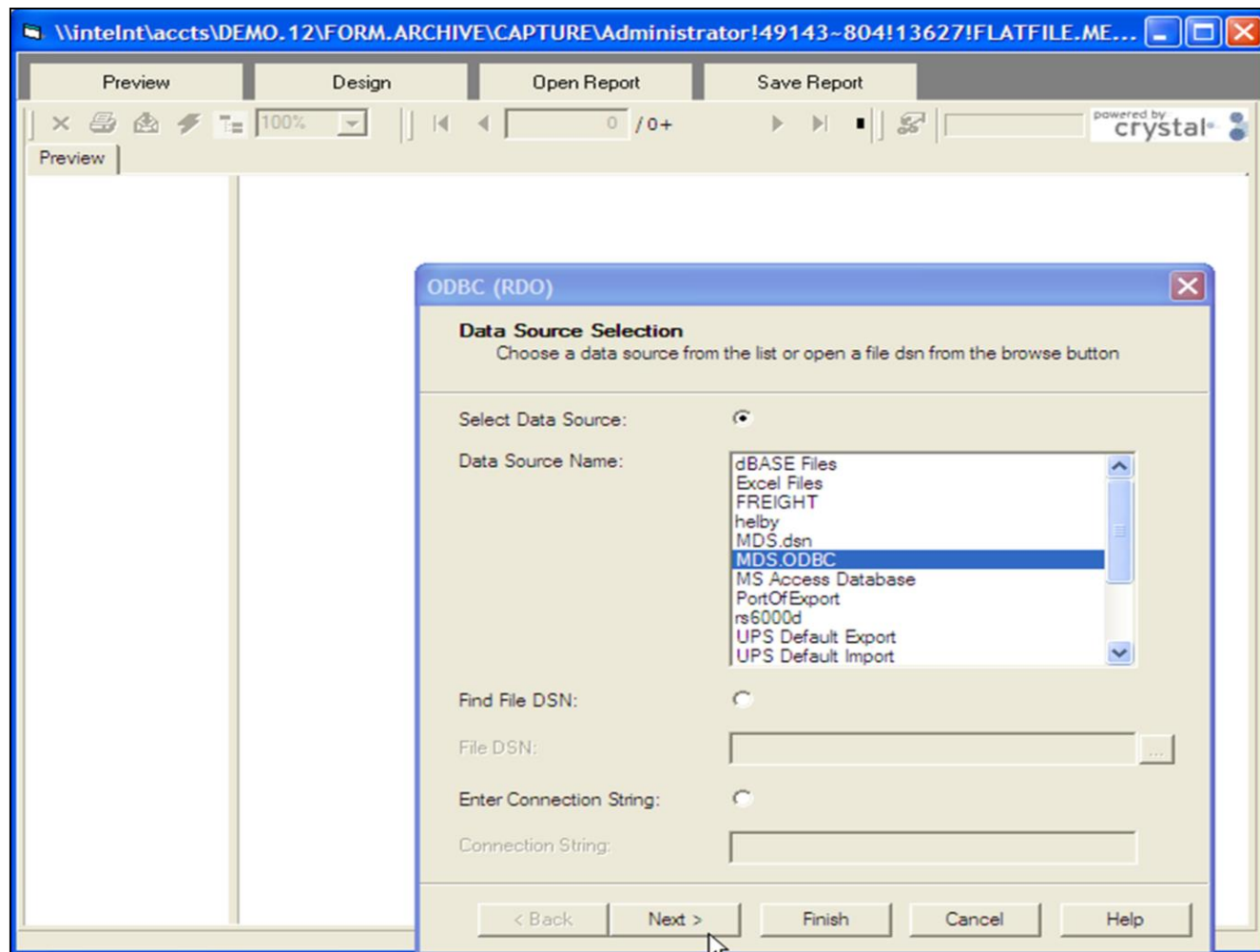
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ODBC MDS Tables by Area

This Crystal Report, will define each area of the MDS system as well as list specific files in that area. This will help the user choose the appropriate files when creating the query.

Once the report title is clicked, the system will open the report in the Crystal Report viewer.

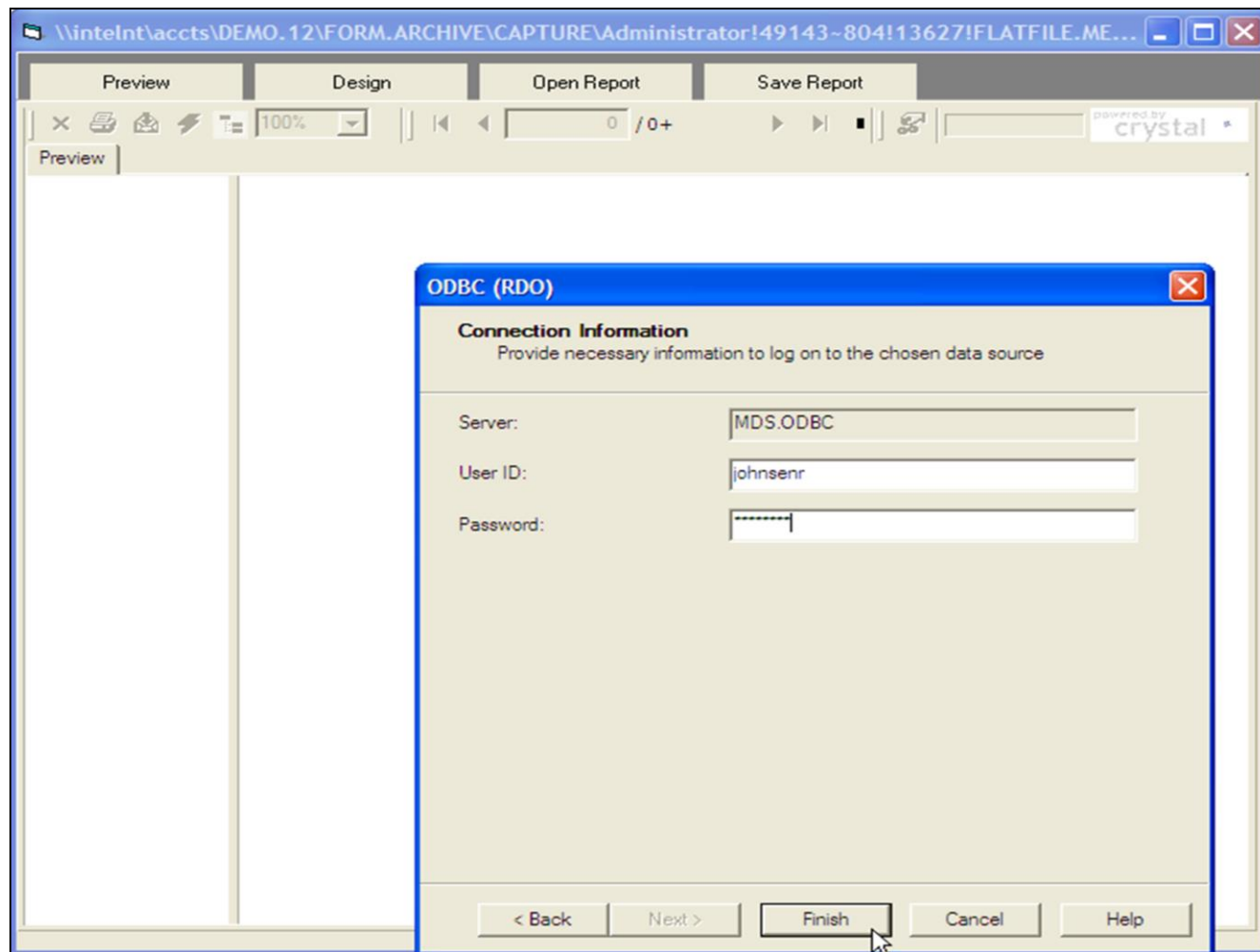**Note:** You must have a data source already configured to run this report.

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ODBC MDS Tables by Area

Data Source Selection

The Select Data Source radio button should be selected.

Under the field, Data Source Name, select your Data Source Name from the list.

Then click on the "Next" button.

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ODBC MDS Tables by Area

Connection Information

The server information is displayed. This should match the data source that was entered on the previous page.

User ID – Enter your user id

Password – Enter your password

Click on the "Finish" button to display the report.

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The Systems House, Inc.
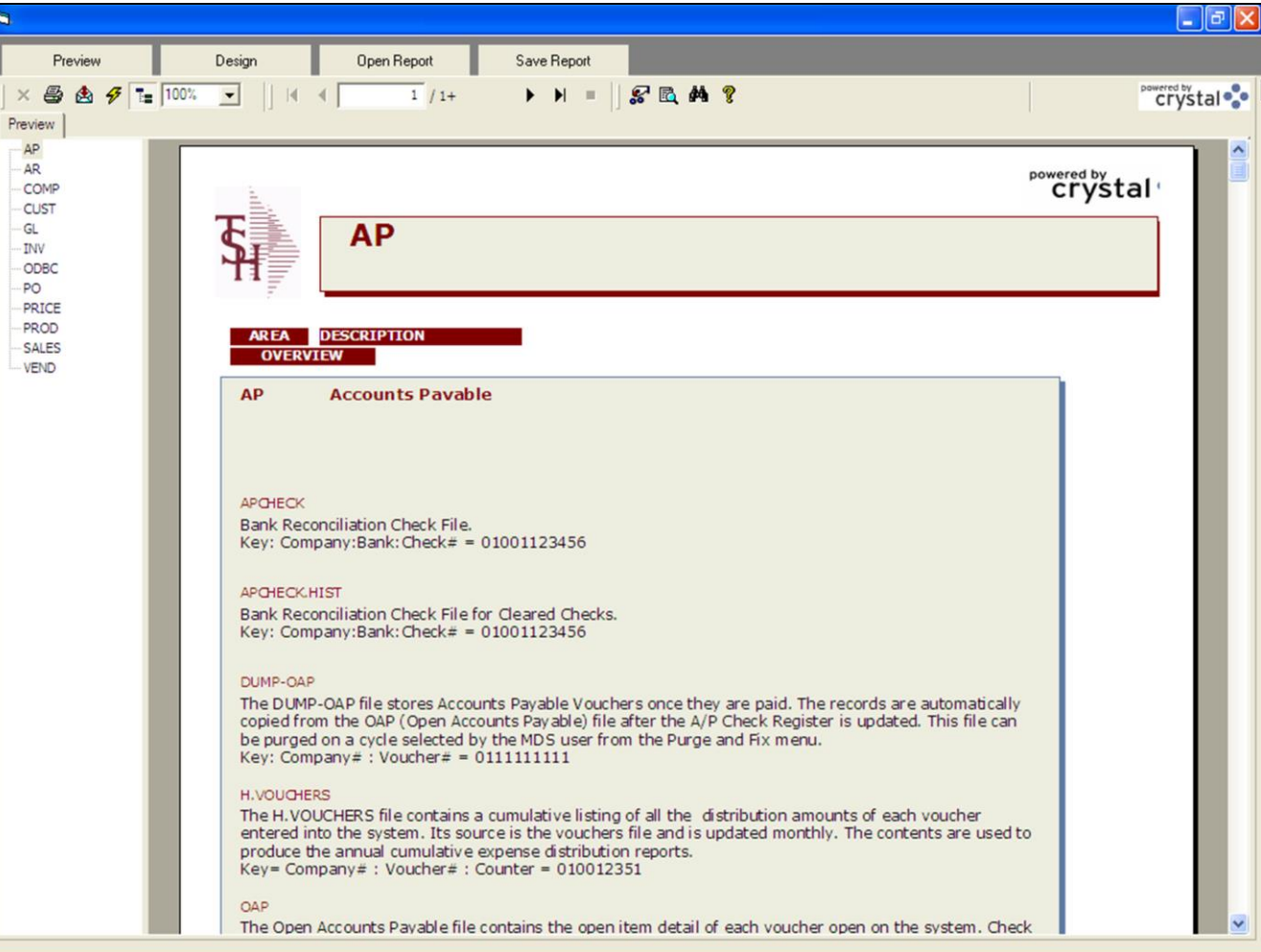
ODBC MDS Tables by Area

The report is displayed in the Crystal Reports viewer.

On the left hand side, the different system areas are displayed. By clicking on a system area, the viewer will display the information regarding it on the right hand side.

This report informs the user which files are related to a specific area.

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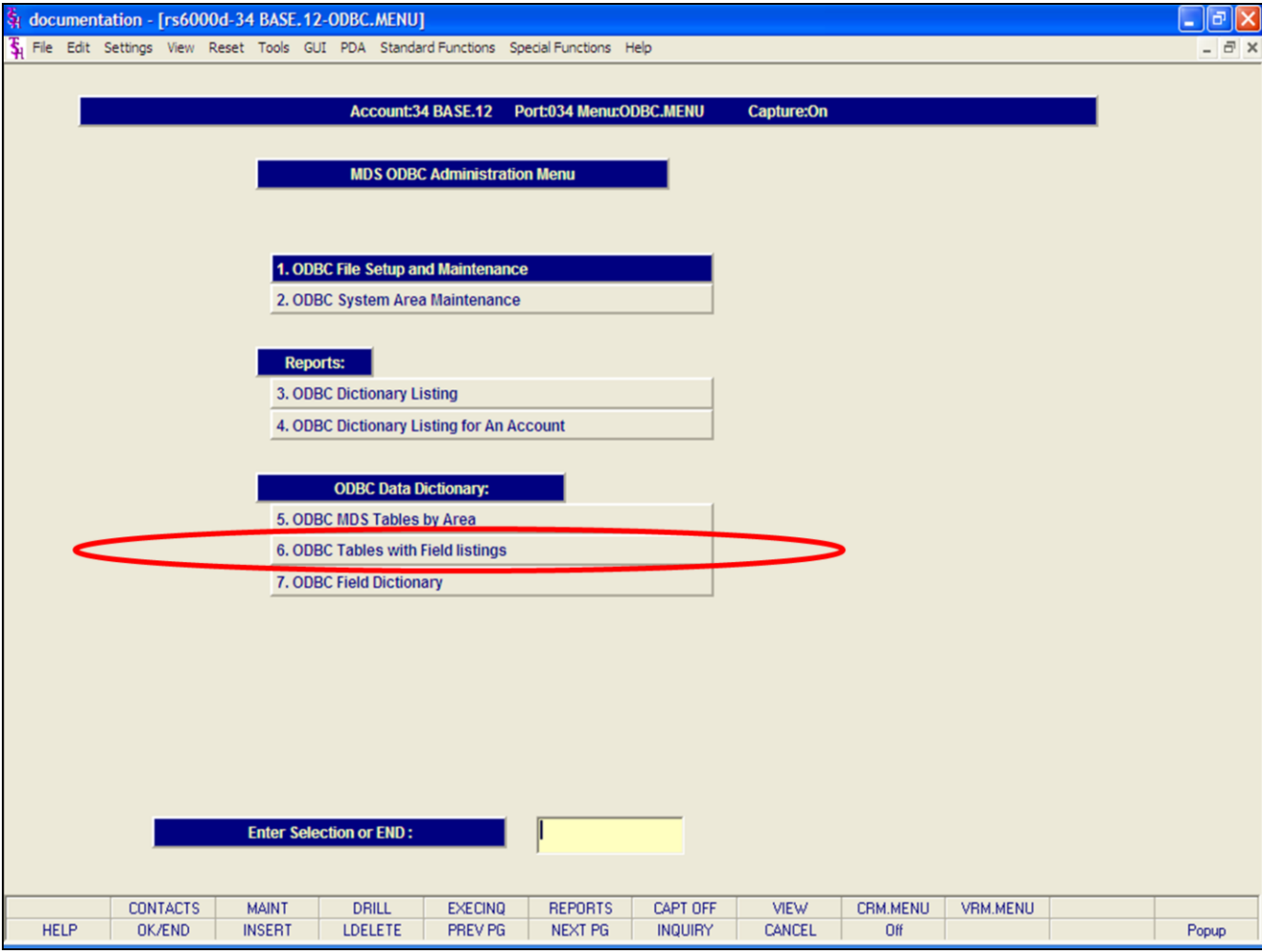
ODBC Tables with Field Listings

This Crystal Report, will list all fields in a specific MDS file. This will help the user choose the appropriate fields when creating the query.

Once the report title is clicked, the system will open the report in the Crystal Report viewer.
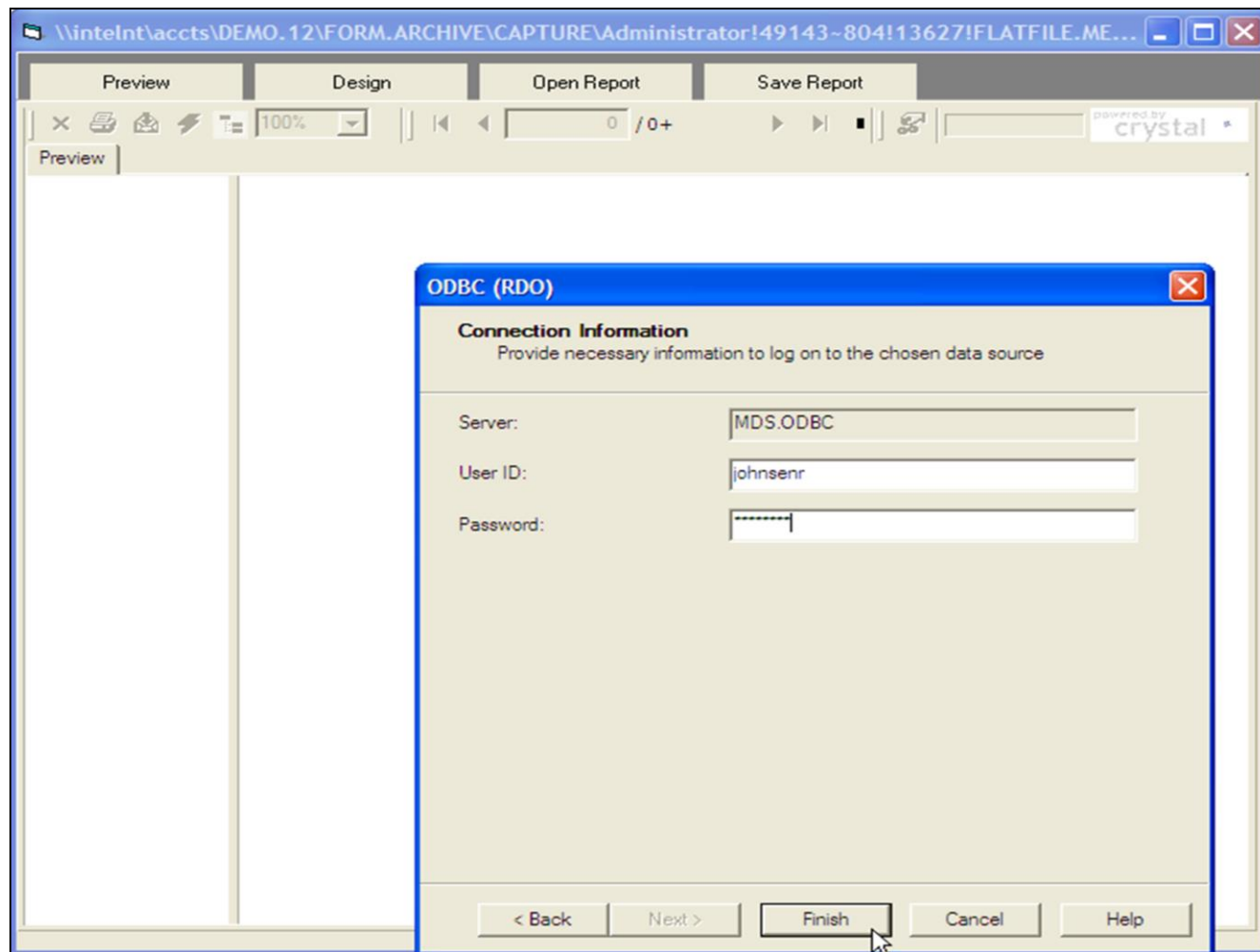
Note: You must have a data source already configured to run this report.

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The Systems House, Inc.
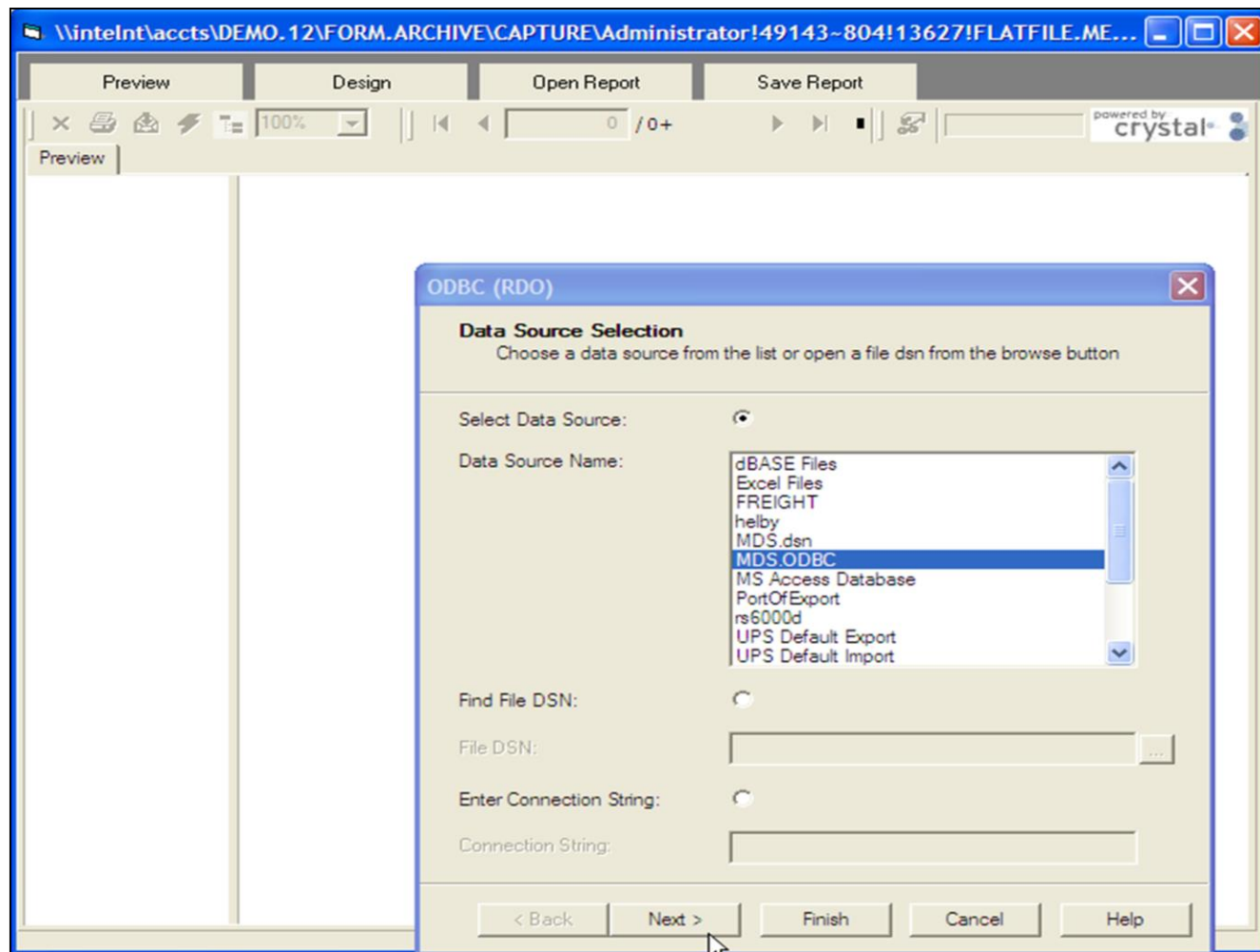
ODBC Tables with Field Listings

Data Source Selection

The Select Data Source radio button should be selected.

Under the field, Data Source Name, select your Data Source Name from the list.

Then click on the "Next" button.

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The Systems House, Inc.
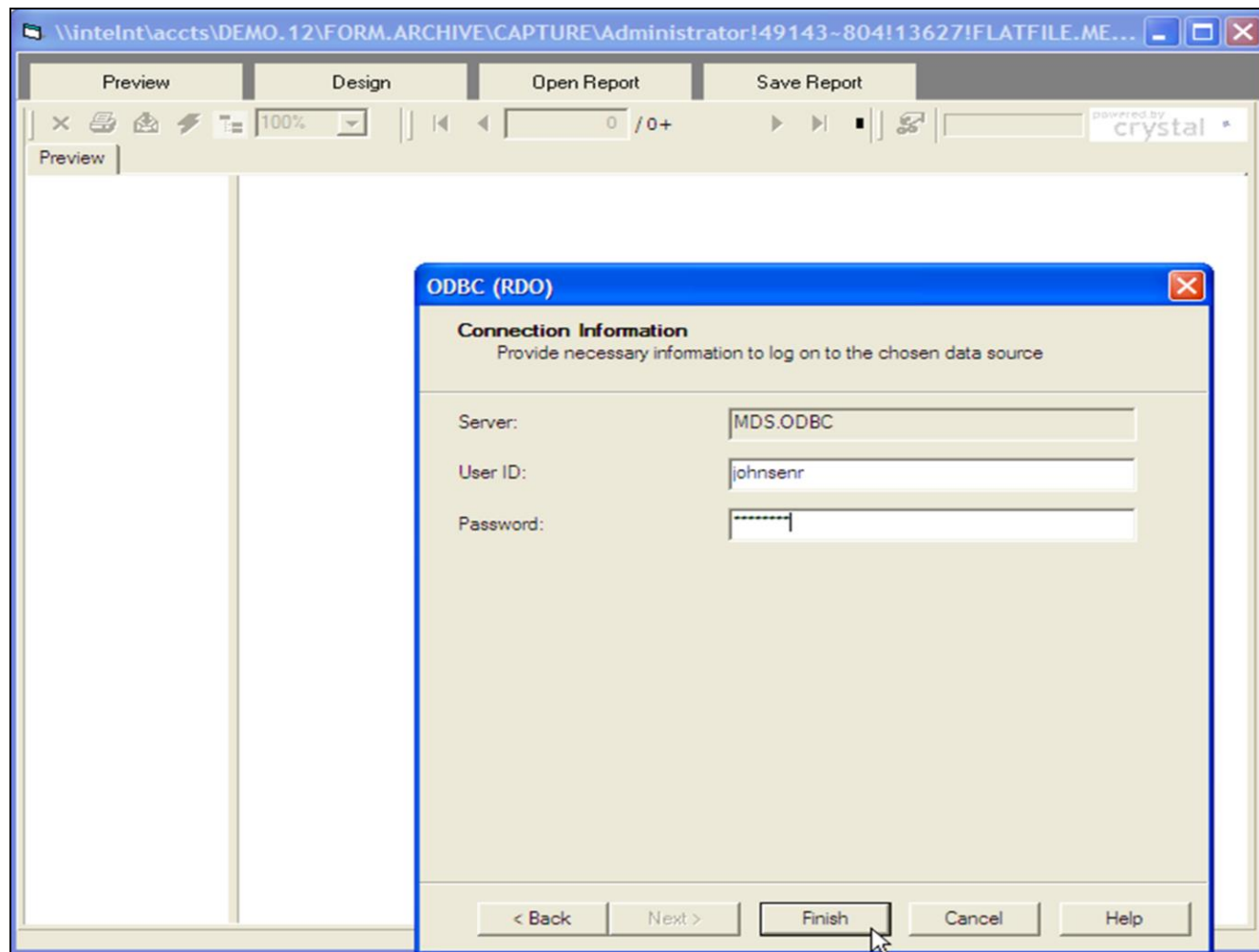
ODBC Tables with Field Listings

Connection Information

The server information is displayed. This should match the data source that was entered on the previous page.

User ID – Enter your user id

Password – Enter your password

Click on the "Finish" button to display the report.

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The Systems House, Inc.
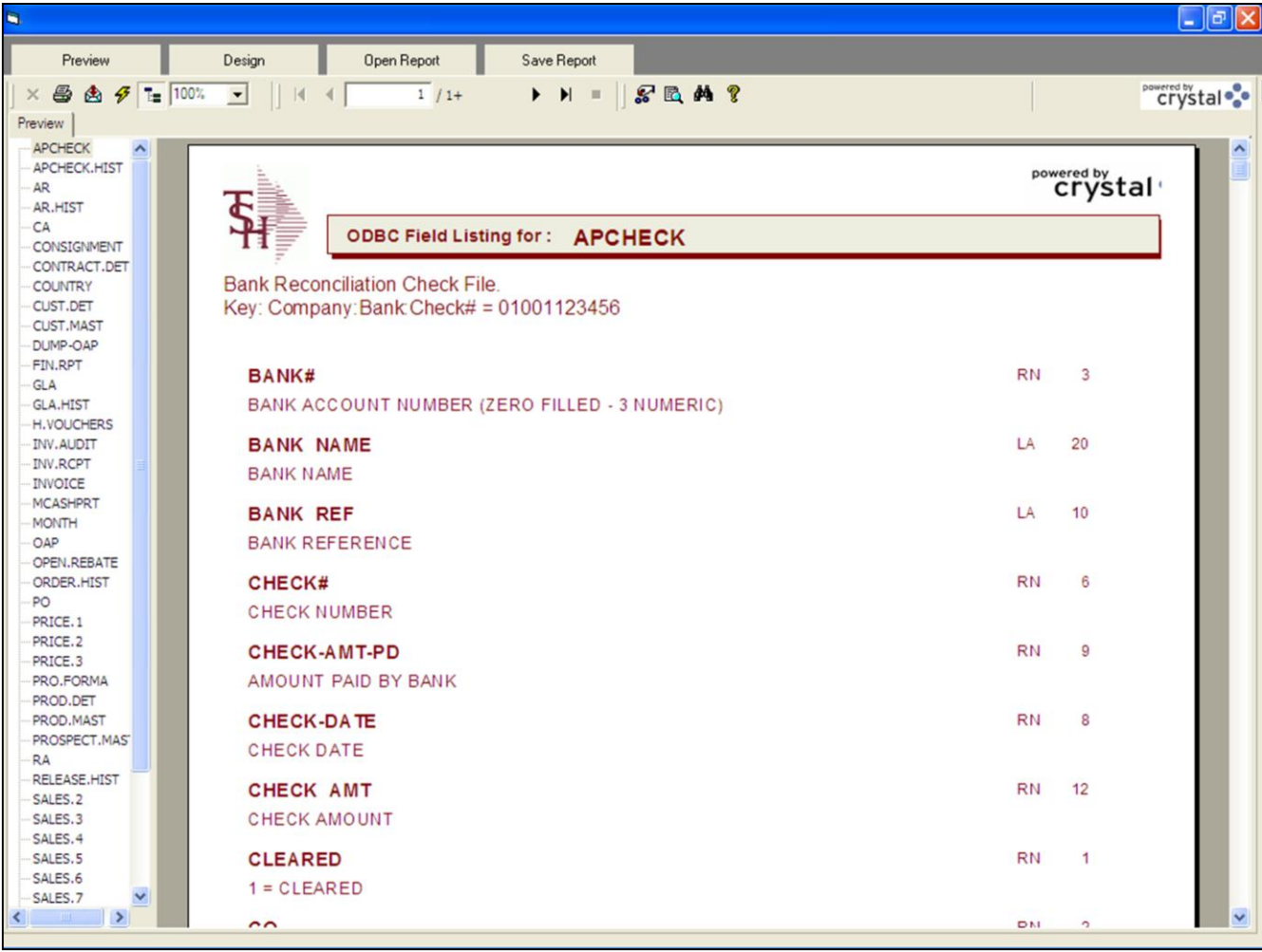
ODBC Tables with Field Listings

The report is displayed in the Crystal Reports viewer.

On the left hand side, all of the MDS ODBC files are displayed. By clicking on a file name, the viewer will display all of the associated field on the right.

This report informs the user which fields are located in a specific MDS ODBC file.

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The Systems House, Inc.
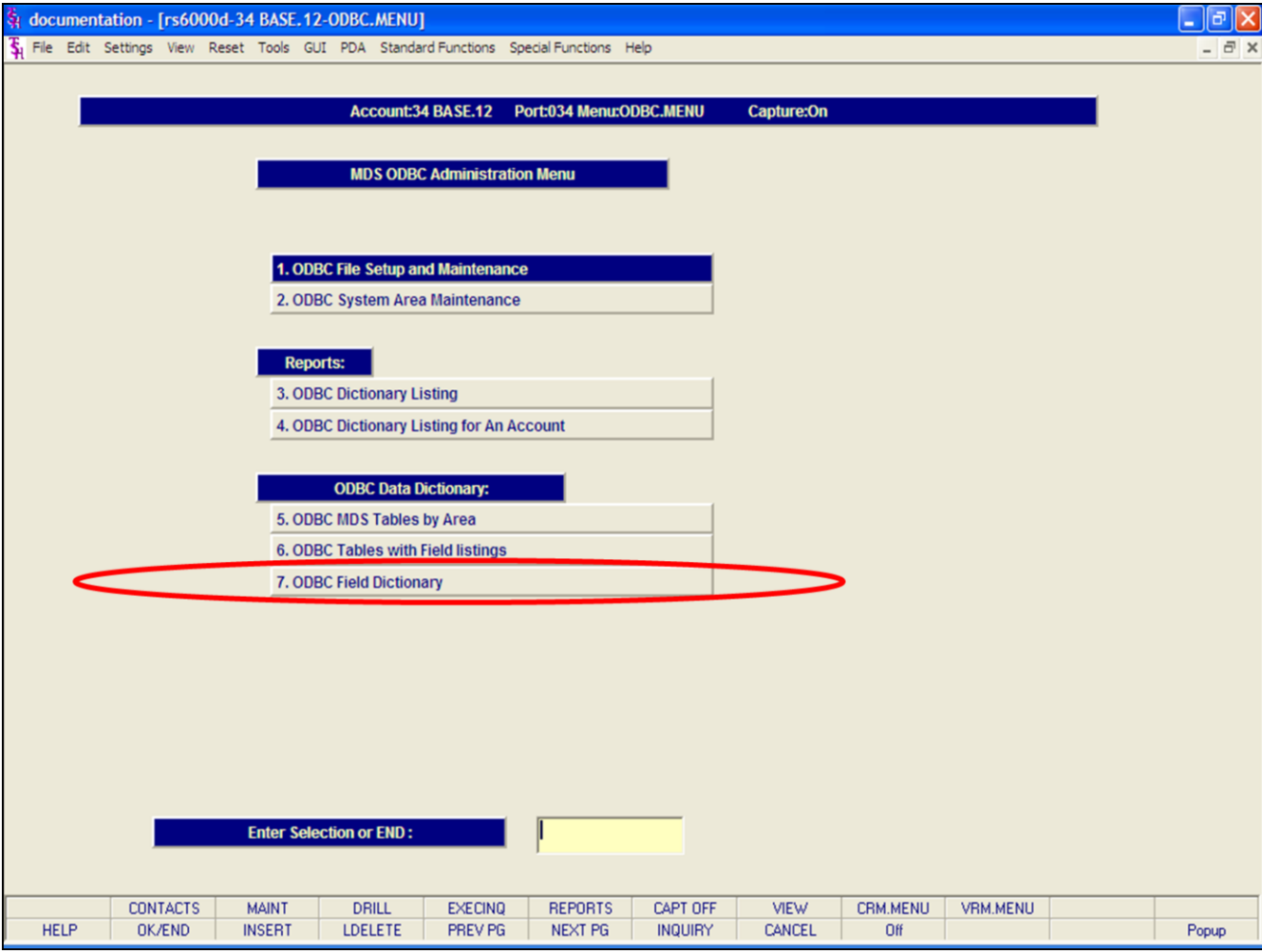
ODBC Field Dictionary

This Crystal Report, will list specific information regarding a field, and what MDS ODBC file it is located in. This will help the user choose the appropriate fields when creating the query.

Once the report title is clicked, the system will open the report in the Crystal Report viewer.

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ODBC Field Dictionary

Data Source Selection

The Select Data Source radio button should be selected.

Under the field, Data Source Name, select your Data Source Name from the list.

Then click on the "Next" button.

Notes:

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Customer Reporting System   33

The Systems House, Inc.

ODBC Field Dictionary

Connection Information

The server information is displayed. This should match the data source that was entered on the previous page.

User ID – Enter your user id

Password – Enter your password

Click on the "Finish" button to display the report.

Notes:

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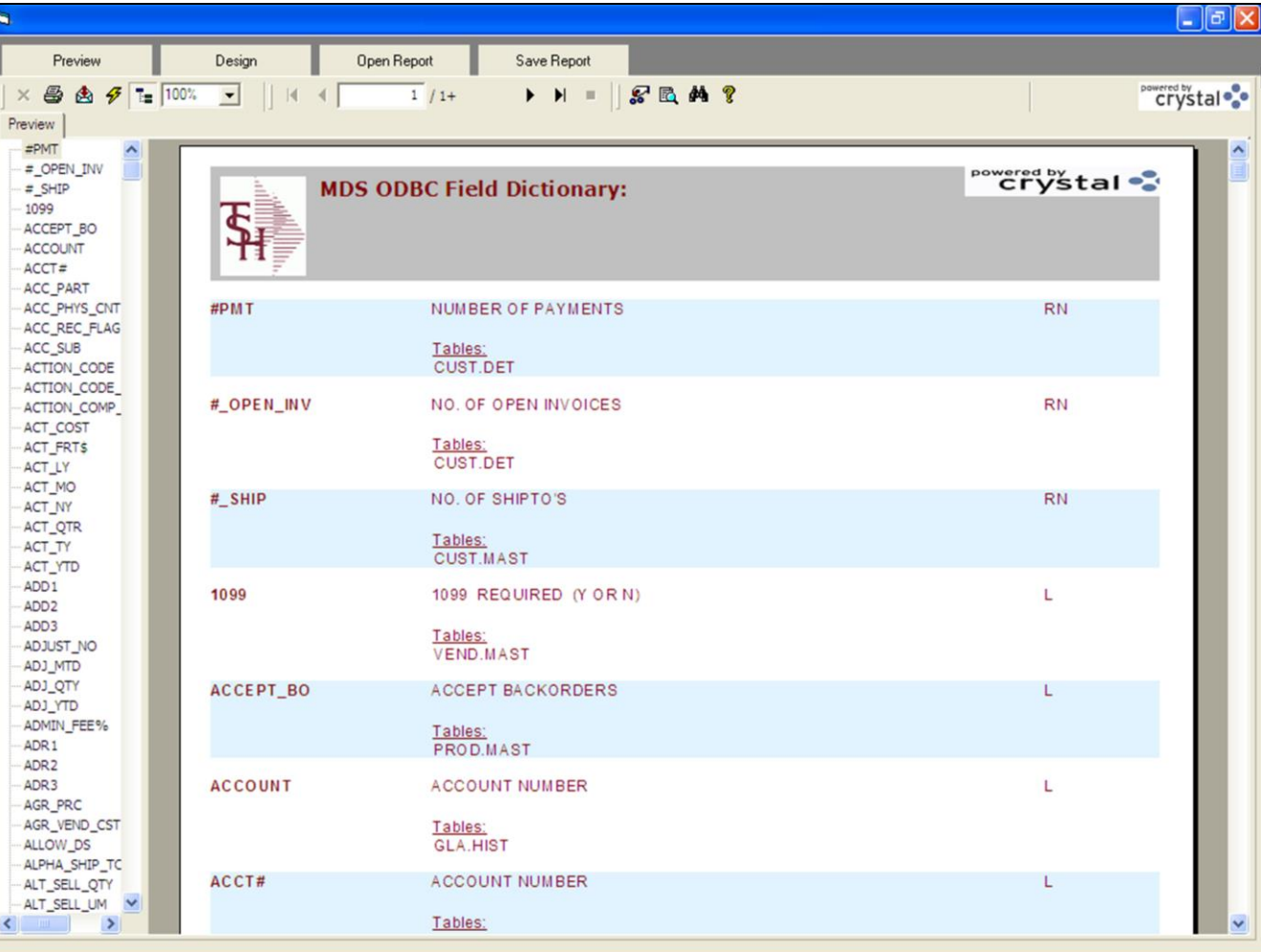
ODBC Field Dictionary

The report is displayed in the Crystal Reports viewer.

On the left hand side, all of the MDS ODBC field dictionaries are displayed. By clicking on a MDS ODBC Field Dictionary name, the viewer will display the fields, with it's description, on the right.

This report informs the user where a specific field is located on the system. For example, MDS ODBC Field Dictionary ACCEPT_BO, is located in the table PROD.MAST.

This report is useful when creating queries using multiple files.

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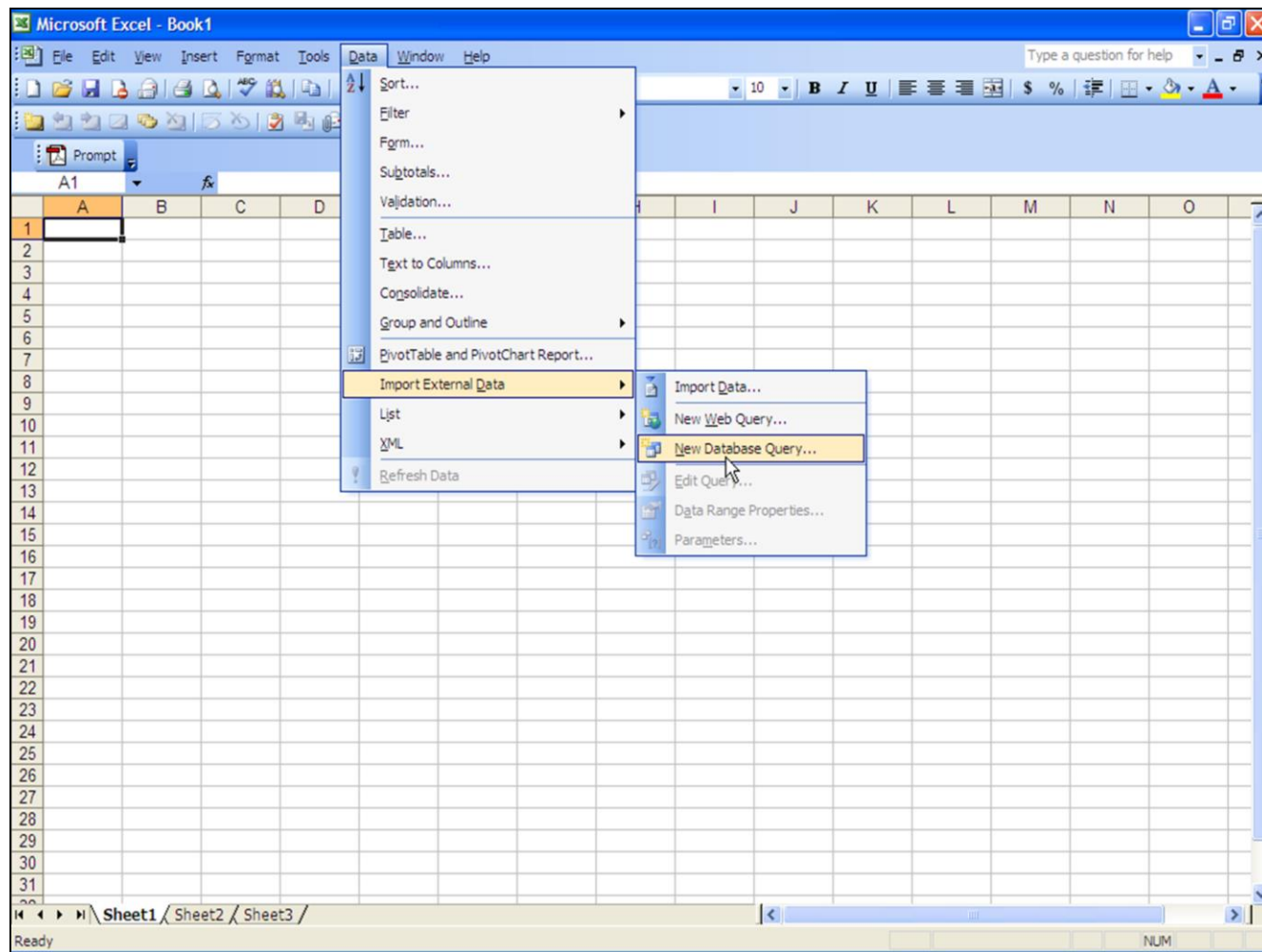
Creating New Queries

To create a new query through Microsoft Excel, follow the steps below. At this point, Microsoft Excel must be installed on your pc.

Open a new workbook in Microsoft Excel.

Go to Data -> Import External Data -> New Database Query.

Notes:

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The Systems House, Inc.
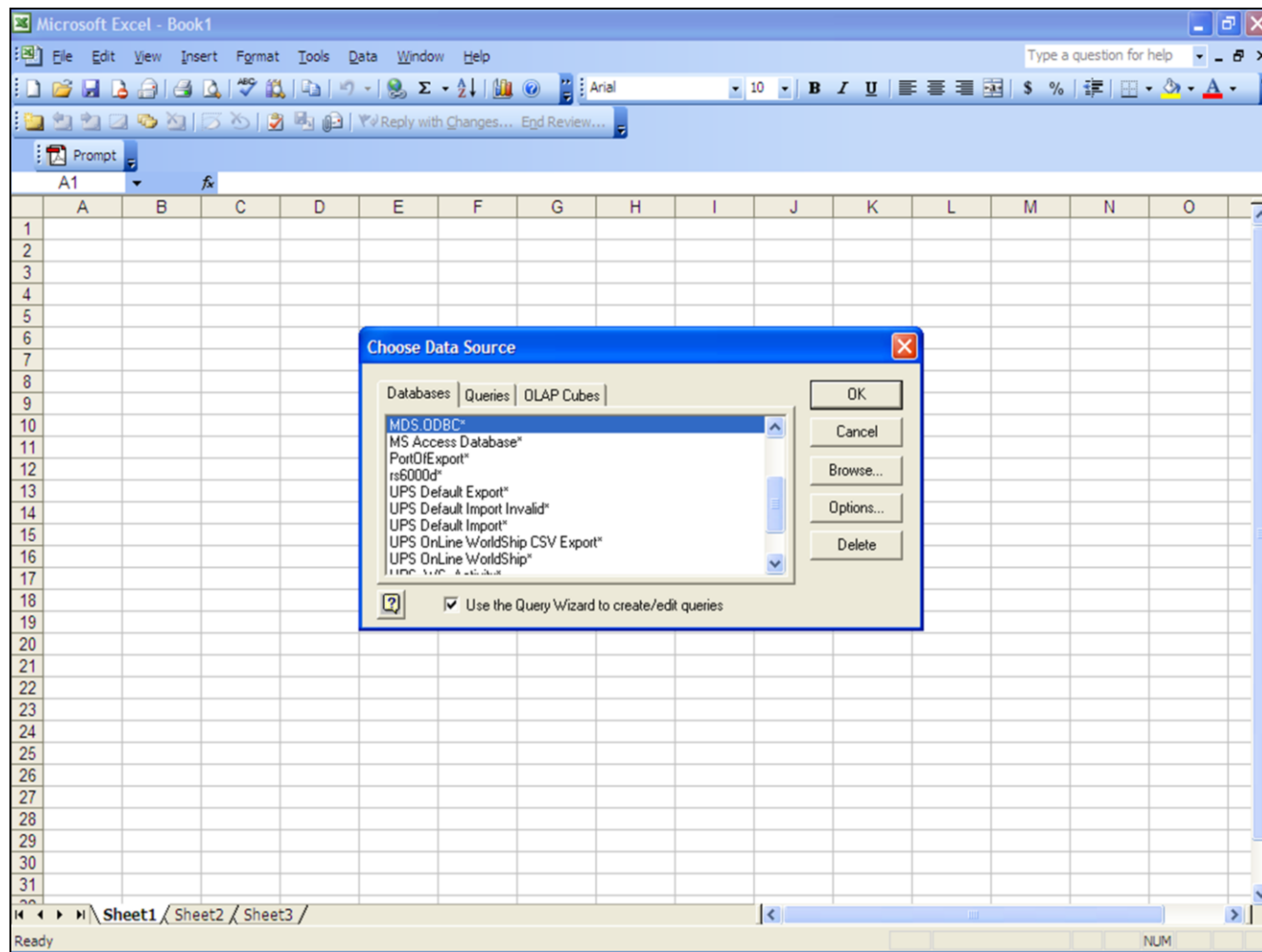
Creating New Queries

A "Choose Data Source" box will appear, select your data source that was created earlier.

Once it is chosen, click on the OK button.

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The Systems House, Inc.
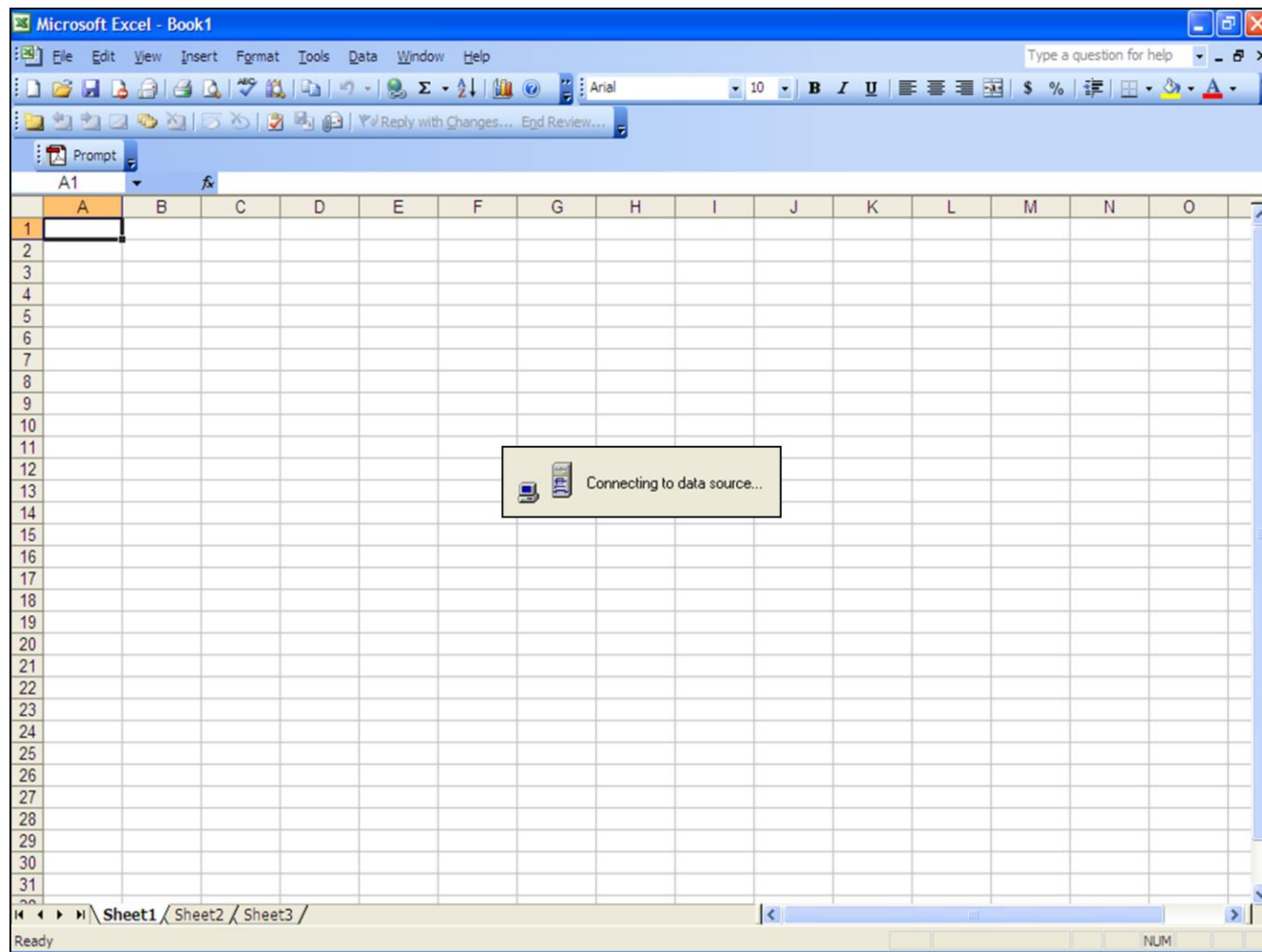
Creating New Queries

At this point, the system will try connecting to your data source.

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The Systems House, Inc.
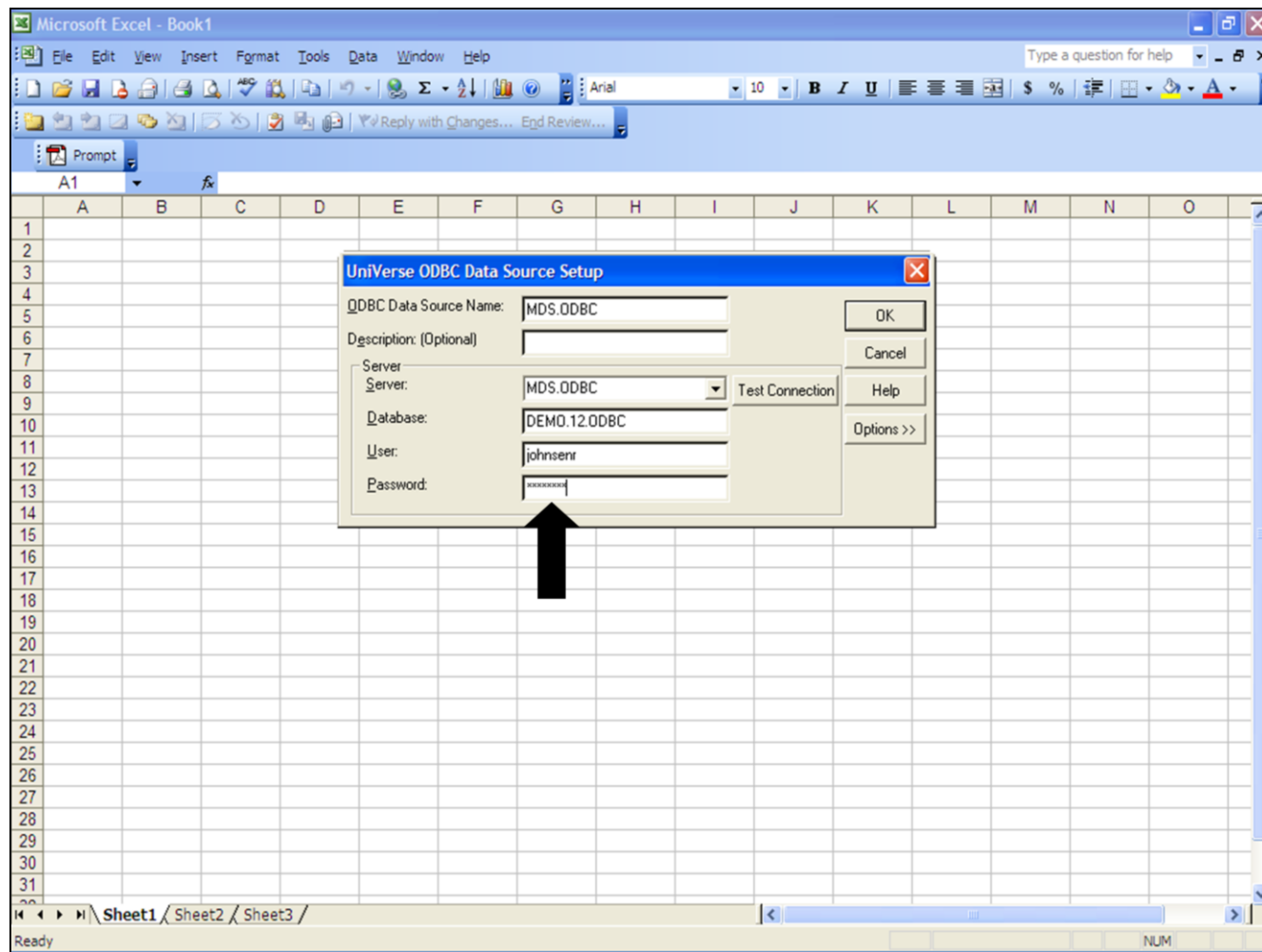
Creating New Queries

If a password was not saved, then the system will display the "UniVerse ODBC Data Source Setup" box. You will need to enter your password, then click on the "OK" button.

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The Systems House, Inc.
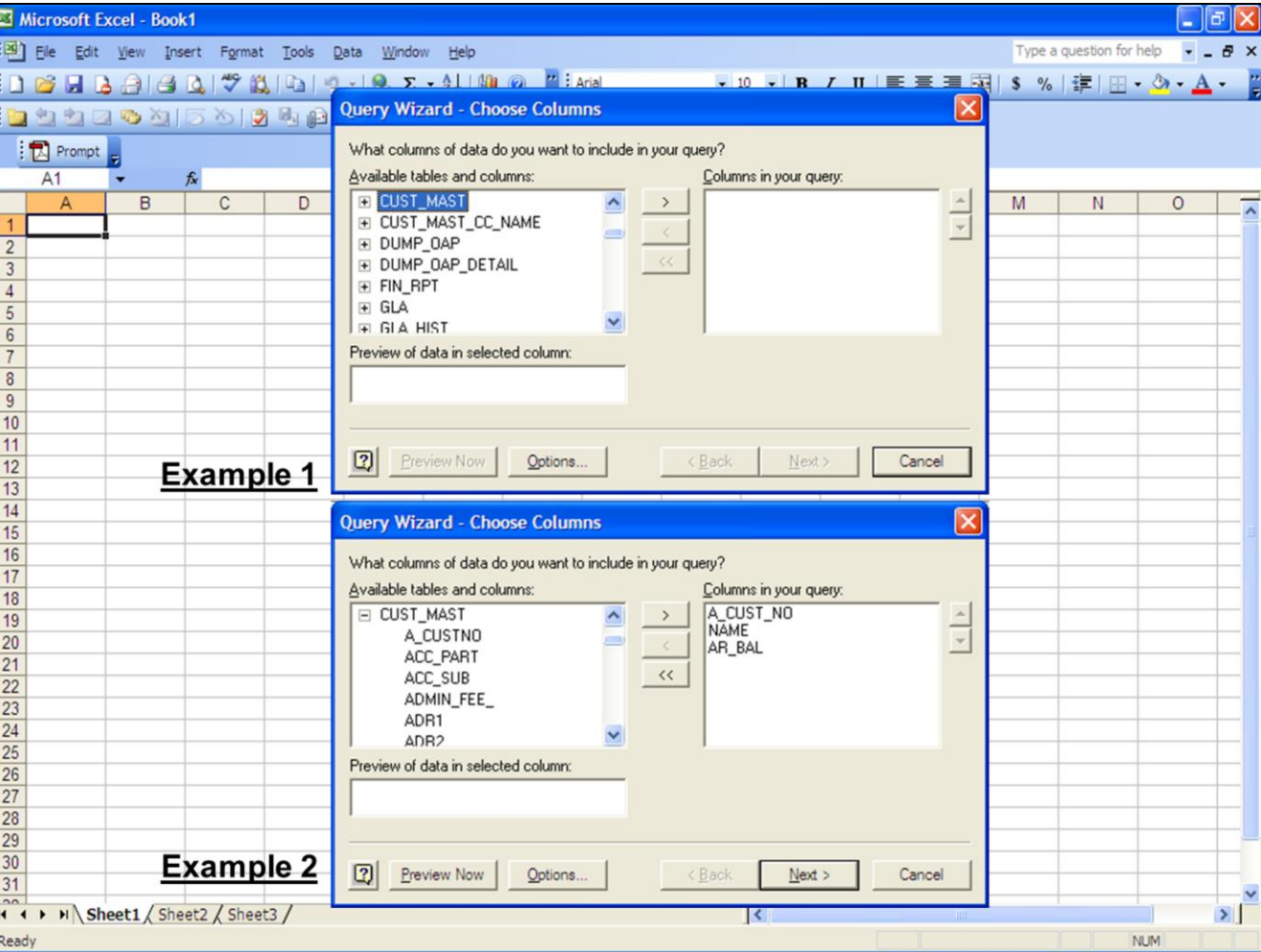
Example 1

Example 2

Creating New Queries

Query Wizard - Choose Columns

The Query Wizard is displayed, and the "Choose Columns" box will appear. On the left hand side, under "Available tables and columns", the MDS ODBC tables are displayed, double click on the table you want to use. For example, scroll down and double click on CUST.MAST. See example #1.

Underneath the CUST.MAST table, you can choose your column names (ODBC fields). Either double click or highlight the column and hit the ">" button. For this example, choose A_CUST_NO, NAME, and AR_BAL, and then click the "Next" button. See example #2.

Notes:

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The Systems House, Inc.

Creating New Queries

Query Wizard – Filter Data

If you want to filter your query to include only a portion of the data, this section filters the query for you. See example #1.

Column to filter – Click on the column you wish to use. For this example, I am using AR_BAL.

Only include rows where – click on the drop down arrow to select the operation you wish to use. You will then be forwarded to the next field where you then enter the data you want in the list on the right. For this example, I chose, under field, "Only include rows where" to be equal to "is greater than or equal to", and entered "1.00" in the column on the right. See example #2.

You can also filter the query further, by clicking on the radio buttons, "And" or "Or".

Once completed, click on the "Next" button.

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The Systems House, Inc.
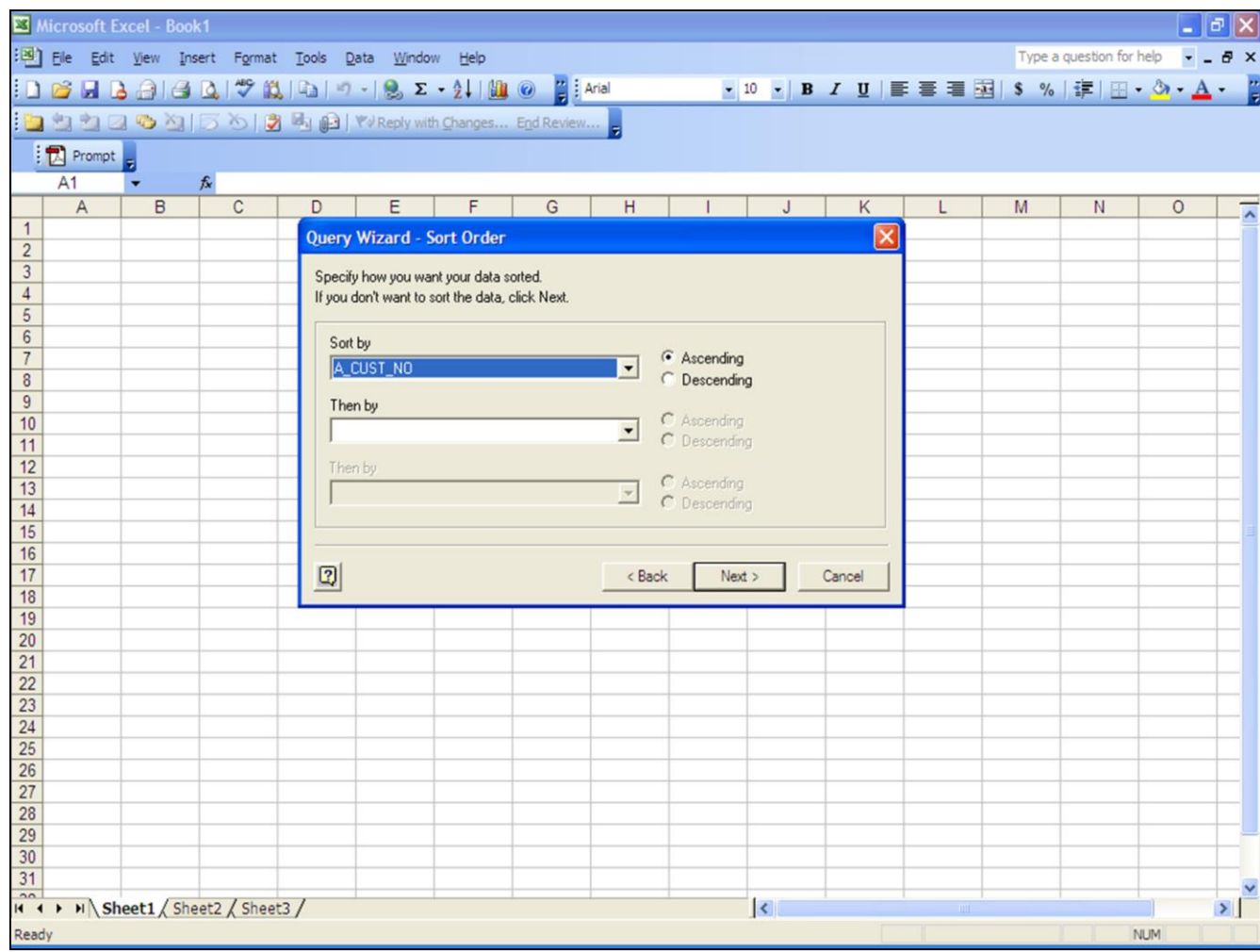
Creating New Queries

Query Wizard – Sort Order

If you want to sort your data, choose how you want this done here.

Sort by – Click on the drop down arrow and choose a column in the "Sort By" field, then click the sort order that you want, Ascending or Descending. For my example, I chose "A_CUSTNO" and the Ascending radio button.

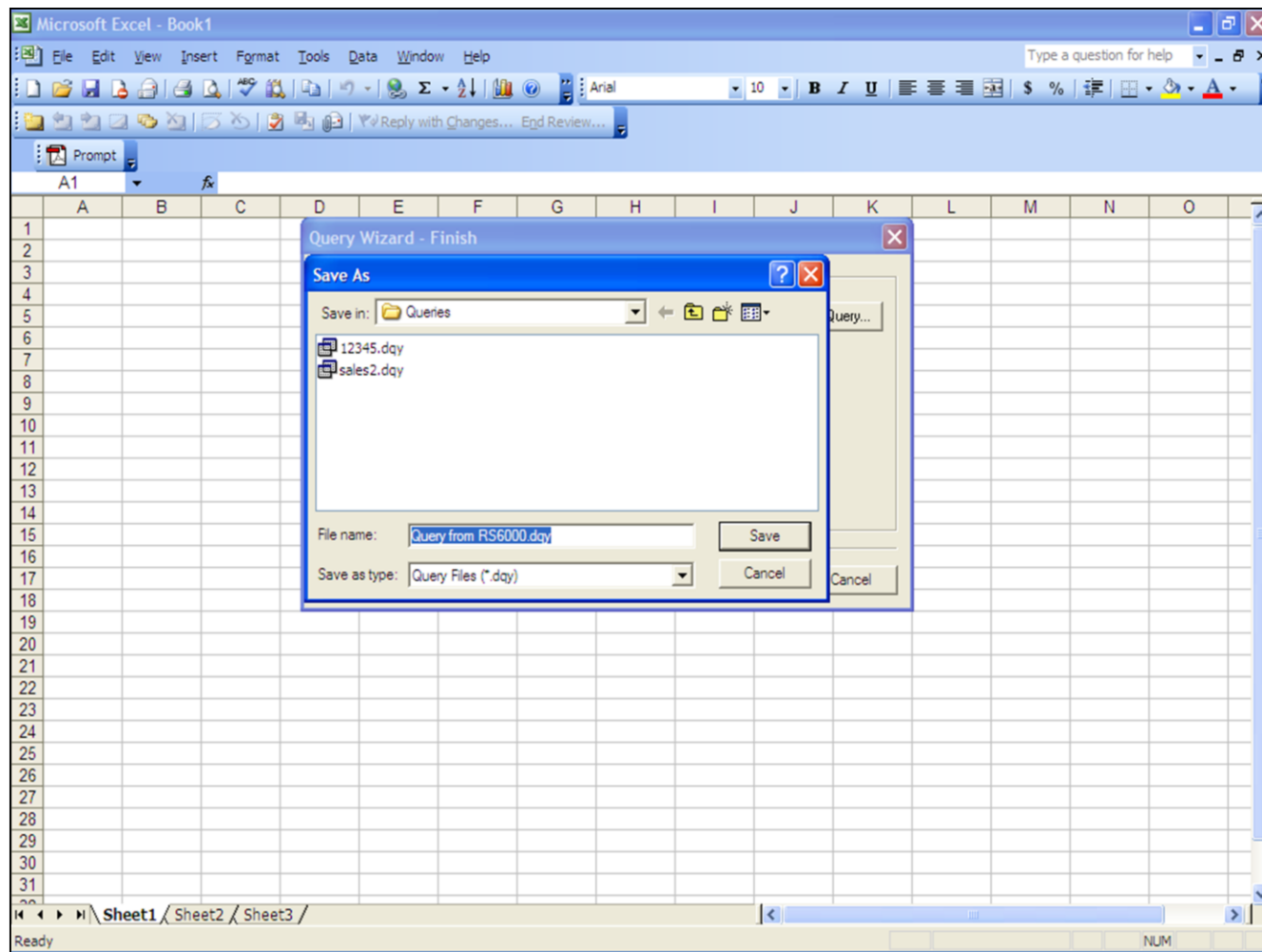Once completed, click on the "Next" button.

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The Systems House, Inc.
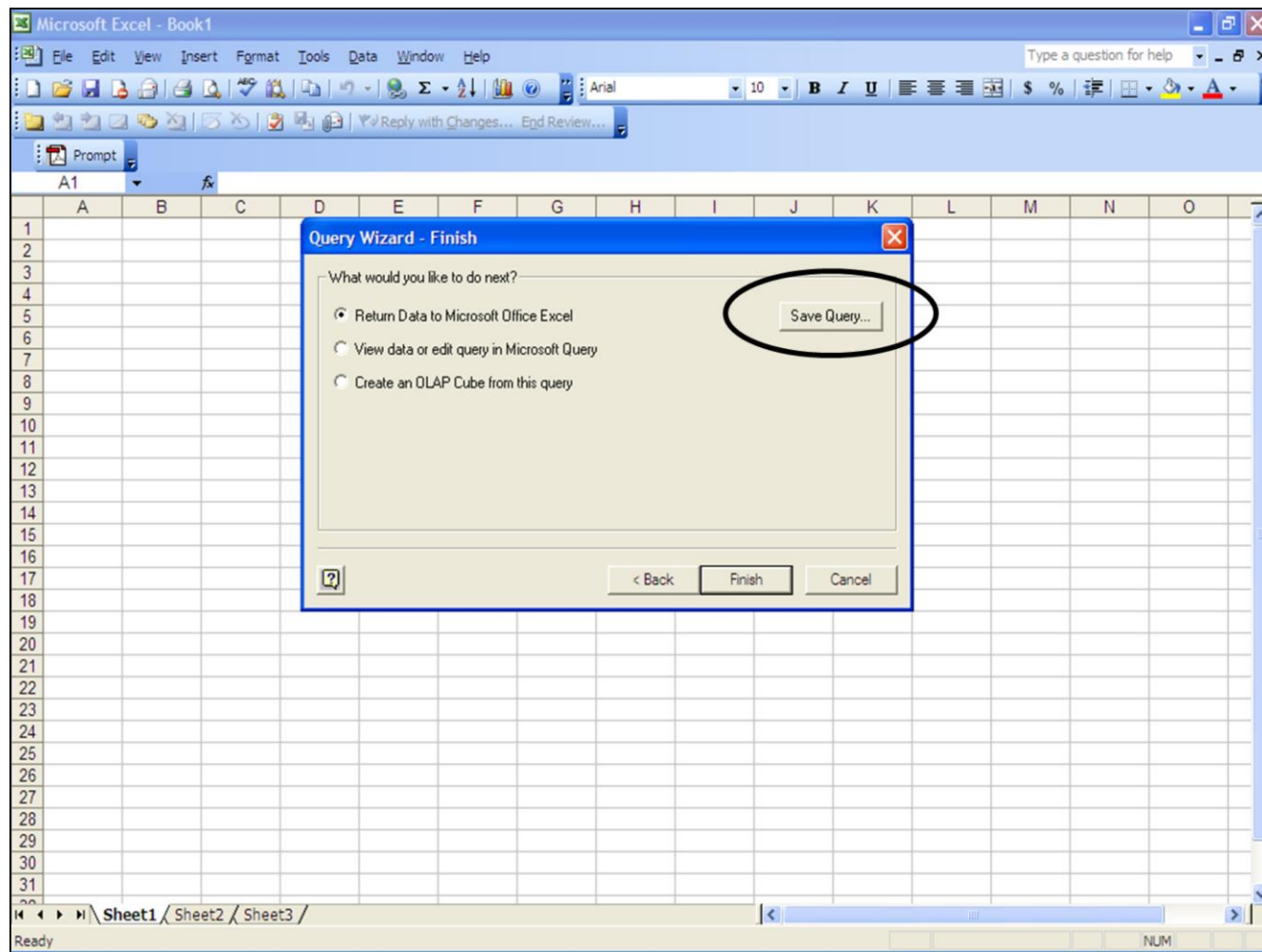
Query Wizard – Finish

If you wish to save this Query for future use, click on the button "Save Query…"

To just return the data to Microsoft Excel, click on the "Finish" button.

Notes:

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The Systems House, Inc.

Creating New Queries

Query Wizard – Finish

Saving Query

You will only see the "Save As" box, if you chose the options "Save" or "Save As".
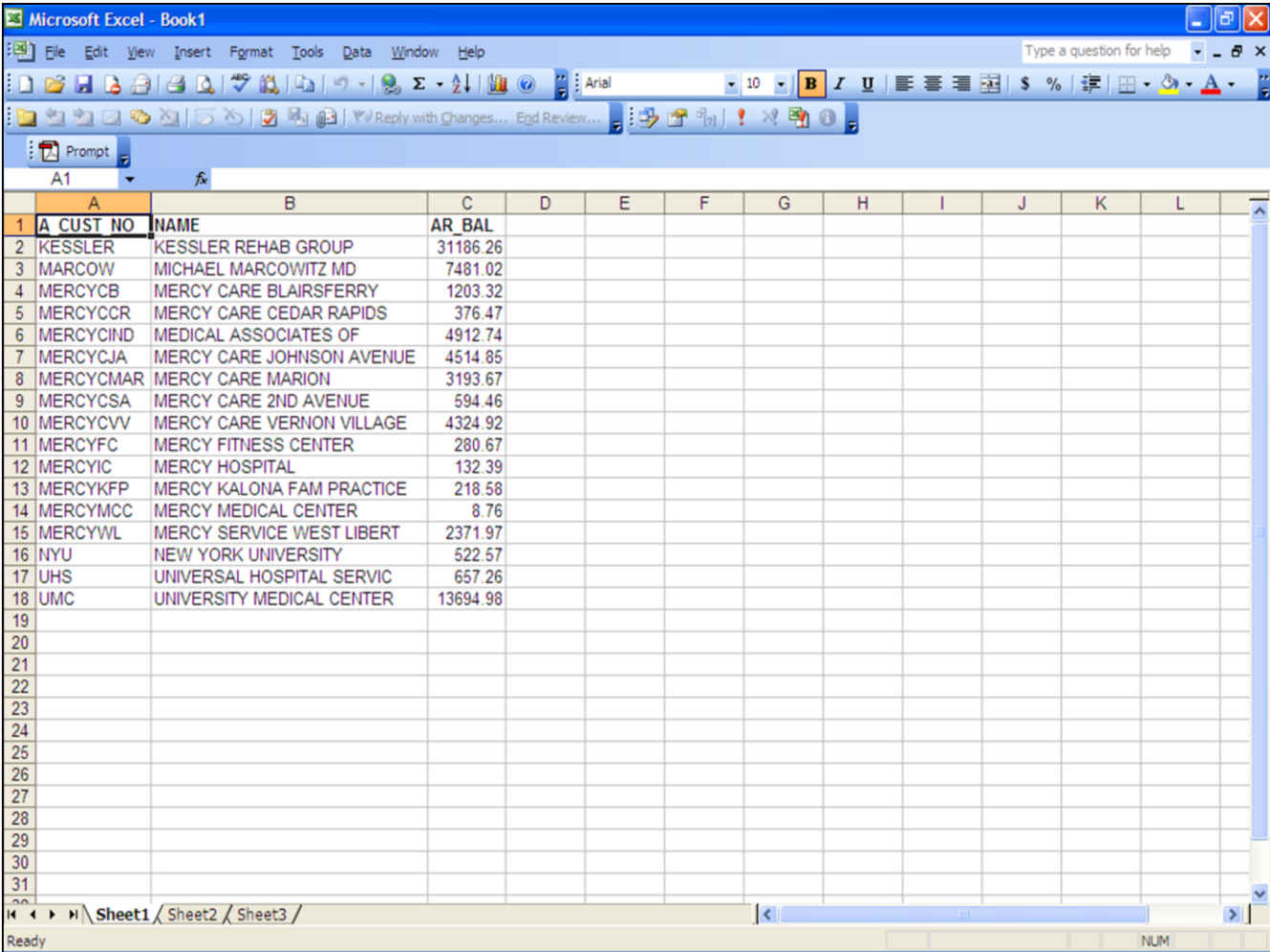
Choose the default name or change the name, then click on the "SAVE" button.

Notes:

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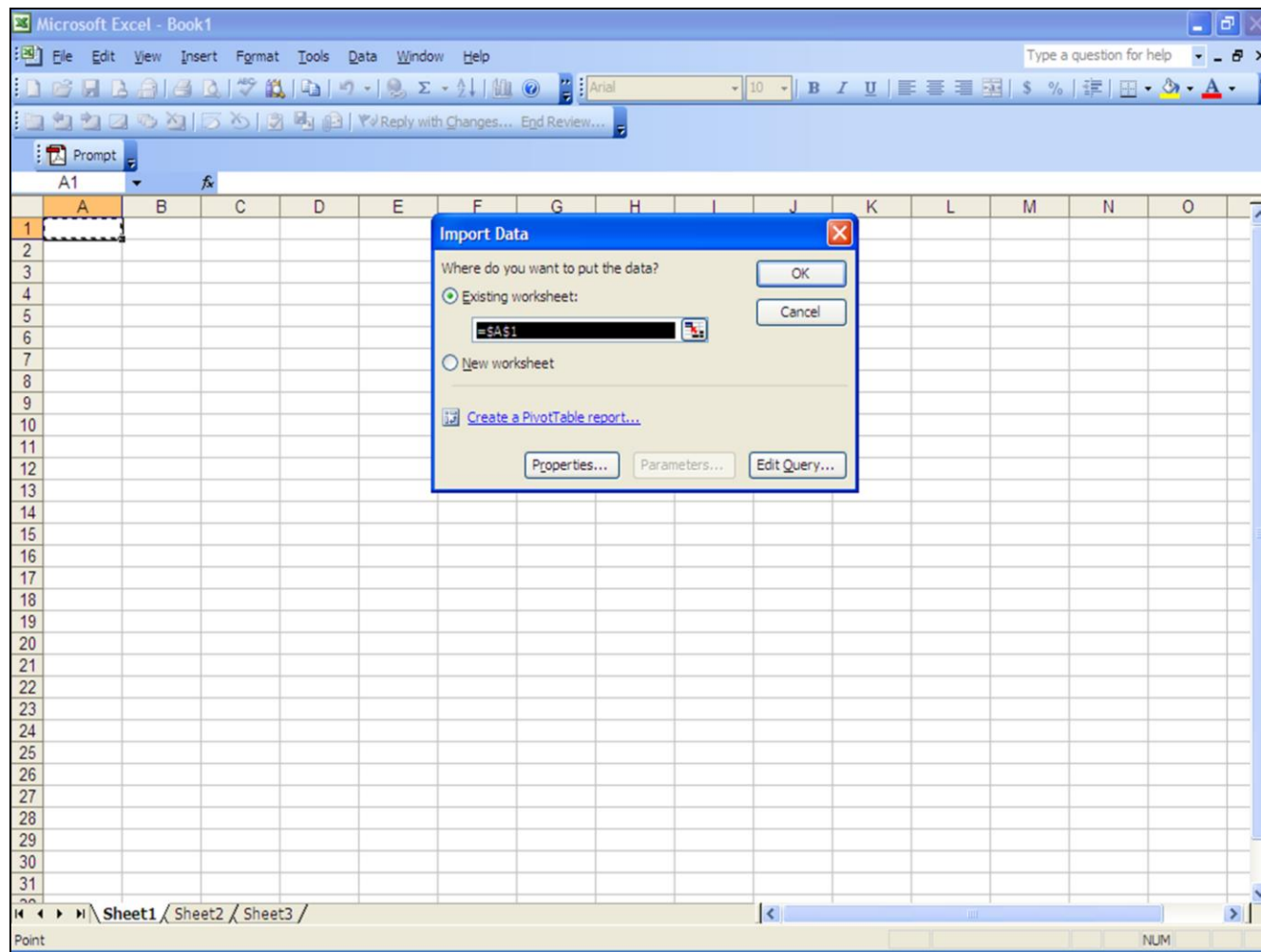
Creating New Queries

Query Wizard – Finish

The default placement of the data is A1 in the existing worksheet. You can change this if you want to. Then click on the "OK" button.
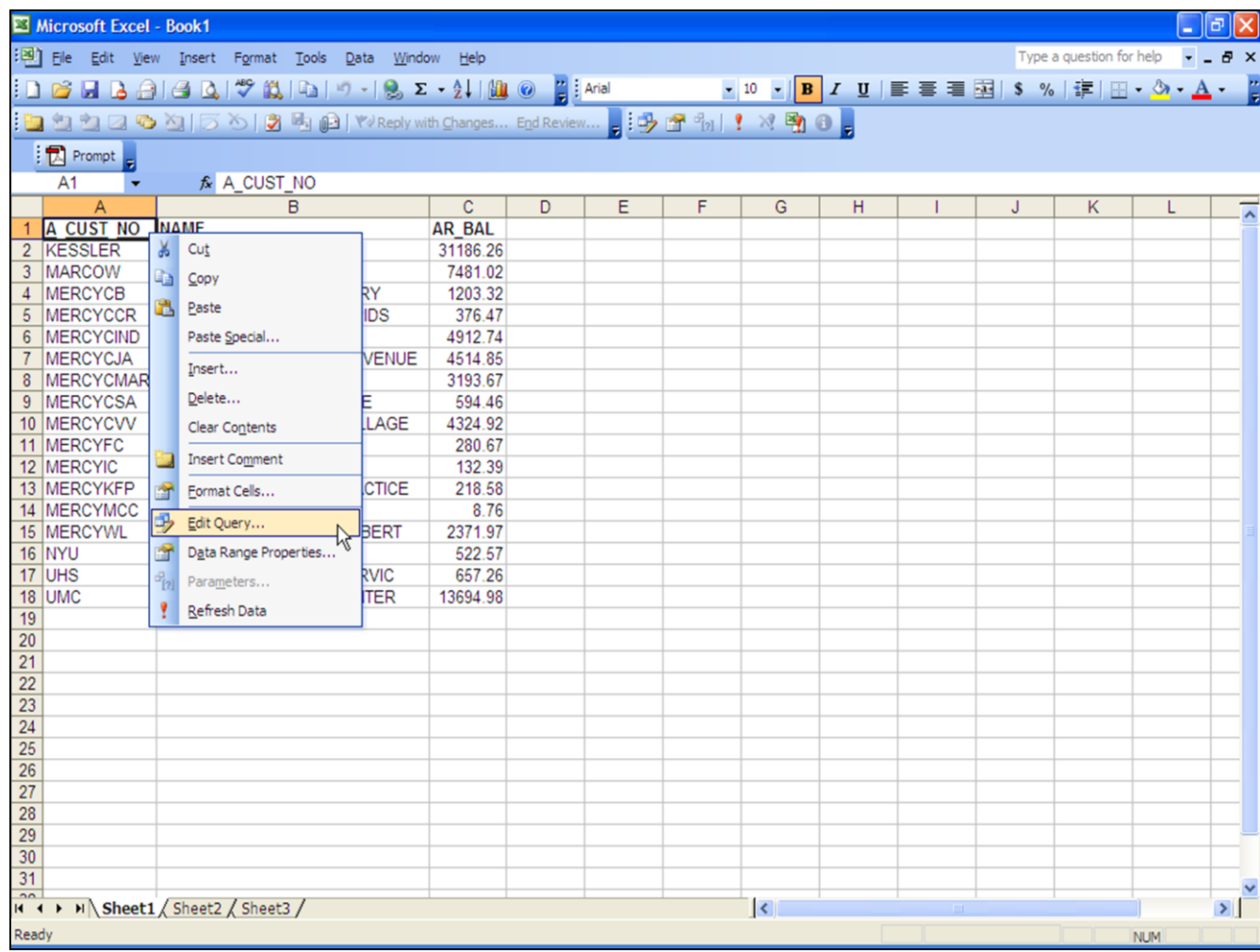
Notes:

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The Systems House, Inc.

Creating New Queries

Query Wizard

A simple, one file query is displayed.

	A_CUST_NO	NAME	AR_BAL
1	A_CUST_NO	NAME	AR_BAL
2	KESSLER	KESSLER REHAB GROUP	31186.26
3	MARCOW	MICHAEL MARCOWITZ MD	7481.02
4	MERCYCB	MERCY CARE BLAIRSFERRY	1203.32
5	MERCYCCR	MERCY CARE CEDAR RAPIDS	376.47
6	MERCYCIND	MEDICAL ASSOCIATES OF	4912.74
7	MERCYCJA	MERCY CARE JOHNSON AVENUE	4514.85
8	MERCYCMAR	MERCY CARE MARION	3193.67
9	MERCYCSA	MERCY CARE 2ND AVENUE	594.46
10	MERCYCVV	MERCY CARE VERNON VILLAGE	4324.92
11	MERCYFC	MERCY FITNESS CENTER	280.67
12	MERCYIC	MERCY HOSPITAL	132.39
13	MERCYKFP	MERCY KALONA FAM PRACTICE	218.58
14	MERCYMCC	MERCY MEDICAL CENTER	8.76
15	MERCYWL	MERCY SERVICE WEST LIBERT	2371.97
16	NYU	NEW YORK UNIVERSITY	522.57
17	UHS	UNIVERSAL HOSPITAL SERVIC	657.26
18	UMC	UNIVERSITY MEDICAL CENTER	13694.98

Notes:

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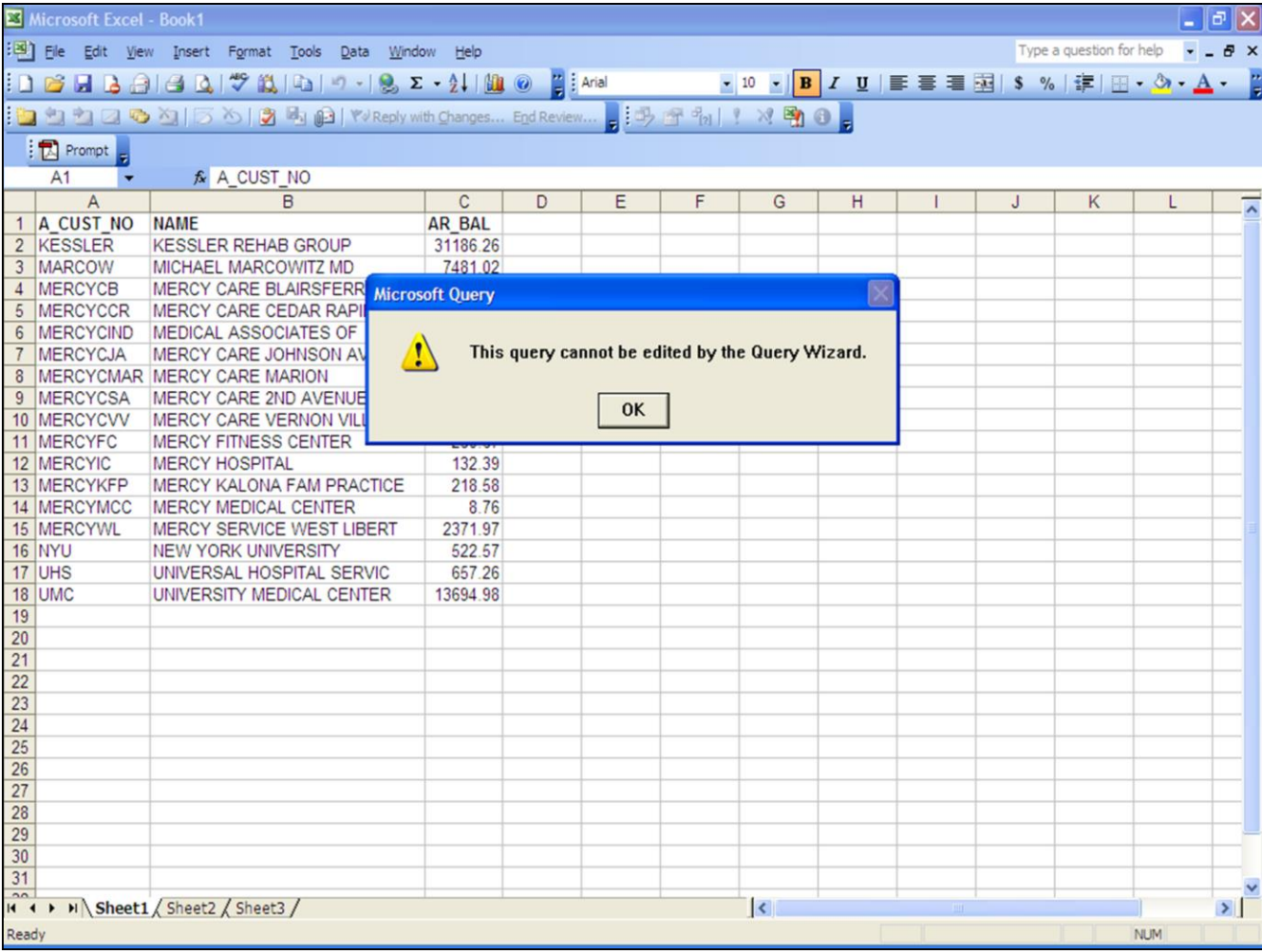_____
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The Systems House, Inc.

Editing a Query Through Excel

First, run the query and have the results displayed on your screen.

Then, right click anywhere on the results, and choose "Edit Query…". See example.
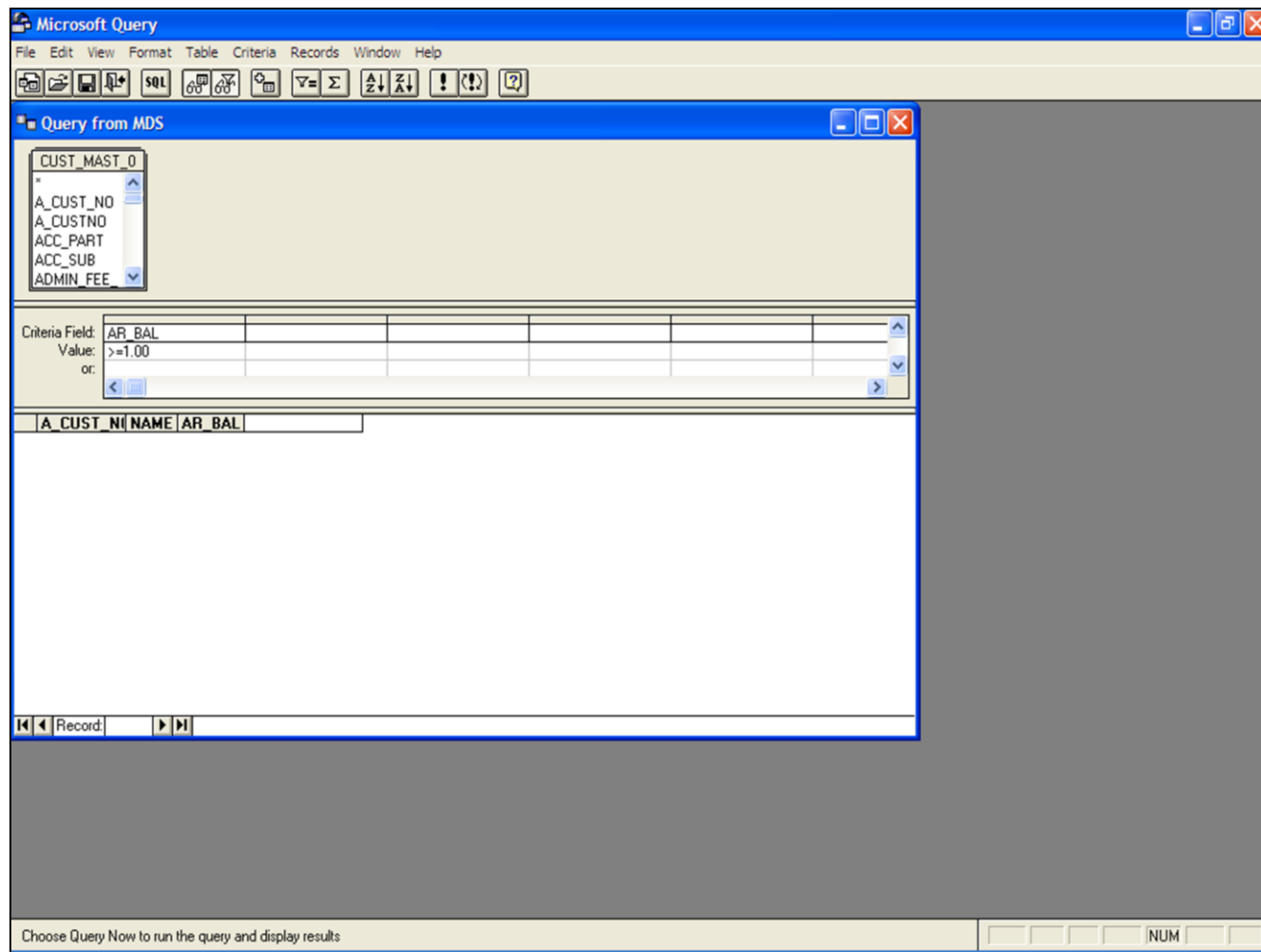
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The Systems House, Inc.

Editing a Query Through Excel

This system will connect to your data source and return the message:

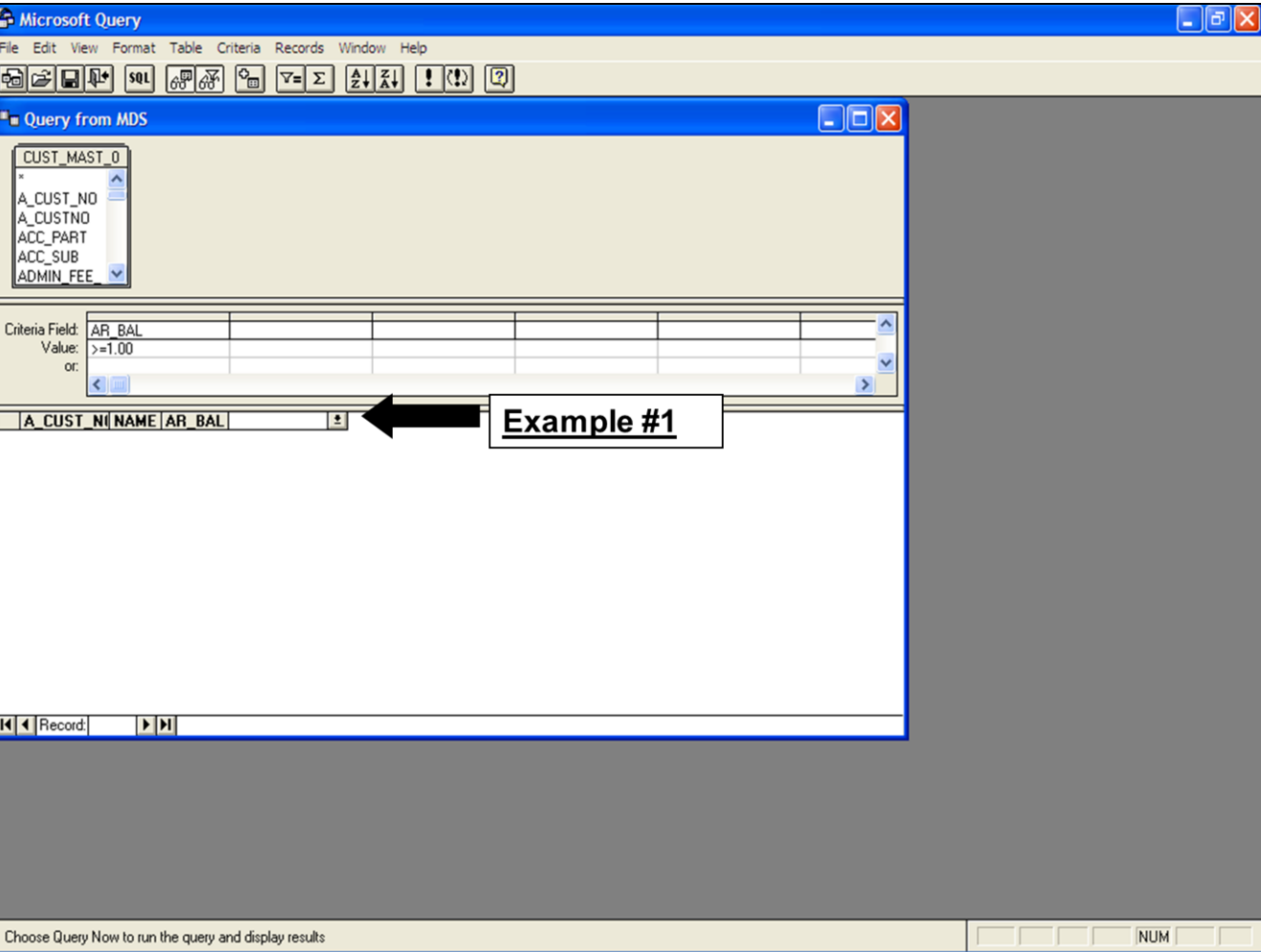"This query cannot be edited by the Query Wizard."

Click "OK" to continue.

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The Systems House, Inc.

Editing a Query Through Excel

The system will then open Microsoft Query. From here all changes can be made.

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Example #1

Editing a Query Through Excel Columns

You can add and/or delete columns.

To add a column to your query you can:

1. Click on the drop down arrow that corresponds with the next available column. See example #1.

2. Scroll through the table (in this example it is CUST_MAST) and double click on the column name to add.

3. Add the column from the toolbar. See next slide for help.

For example, scroll through the table CUST_MAST, then double click on the column name "PHONE".

To delete a column in your query, click on the column to highlight it, and hit the delete key.

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The Systems House, Inc.
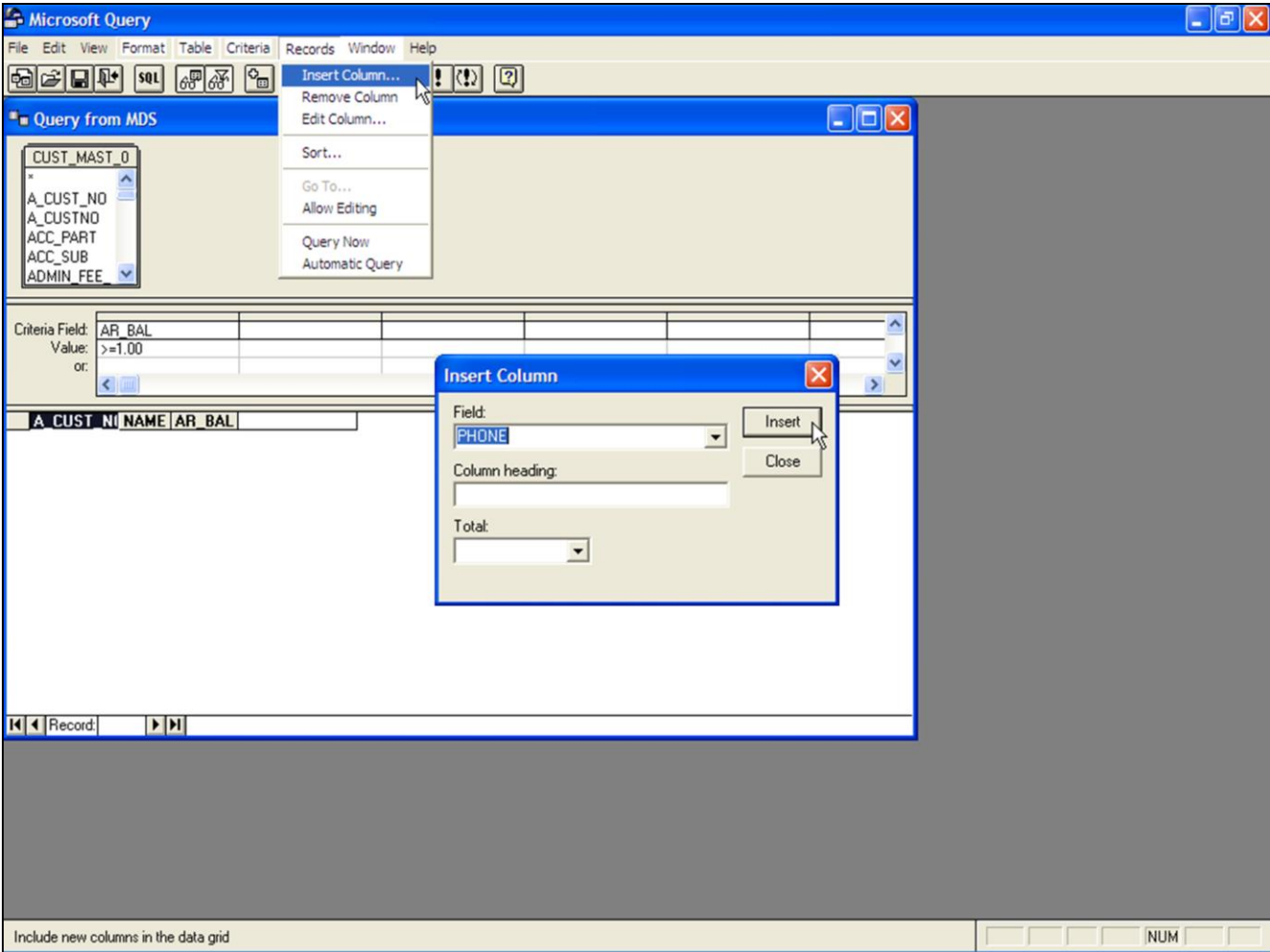
Editing a Query Through Excel
Columns
Adding from Toolbar

From the Toolbar, click on "Records", then click on "Insert Column…"

The "Insert Column" box will display.

Field – Click on the drop down arrow and choose the column name you wish to add. For this example, choose "PHONE".

Column Heading – Custom column headings. For this example, use default.

Total – If this a total column, simply click on the drop down arrow and choose a variable. Your options here are: leave blank (as in this example), Sum, Avg, Count. Min, or Max.

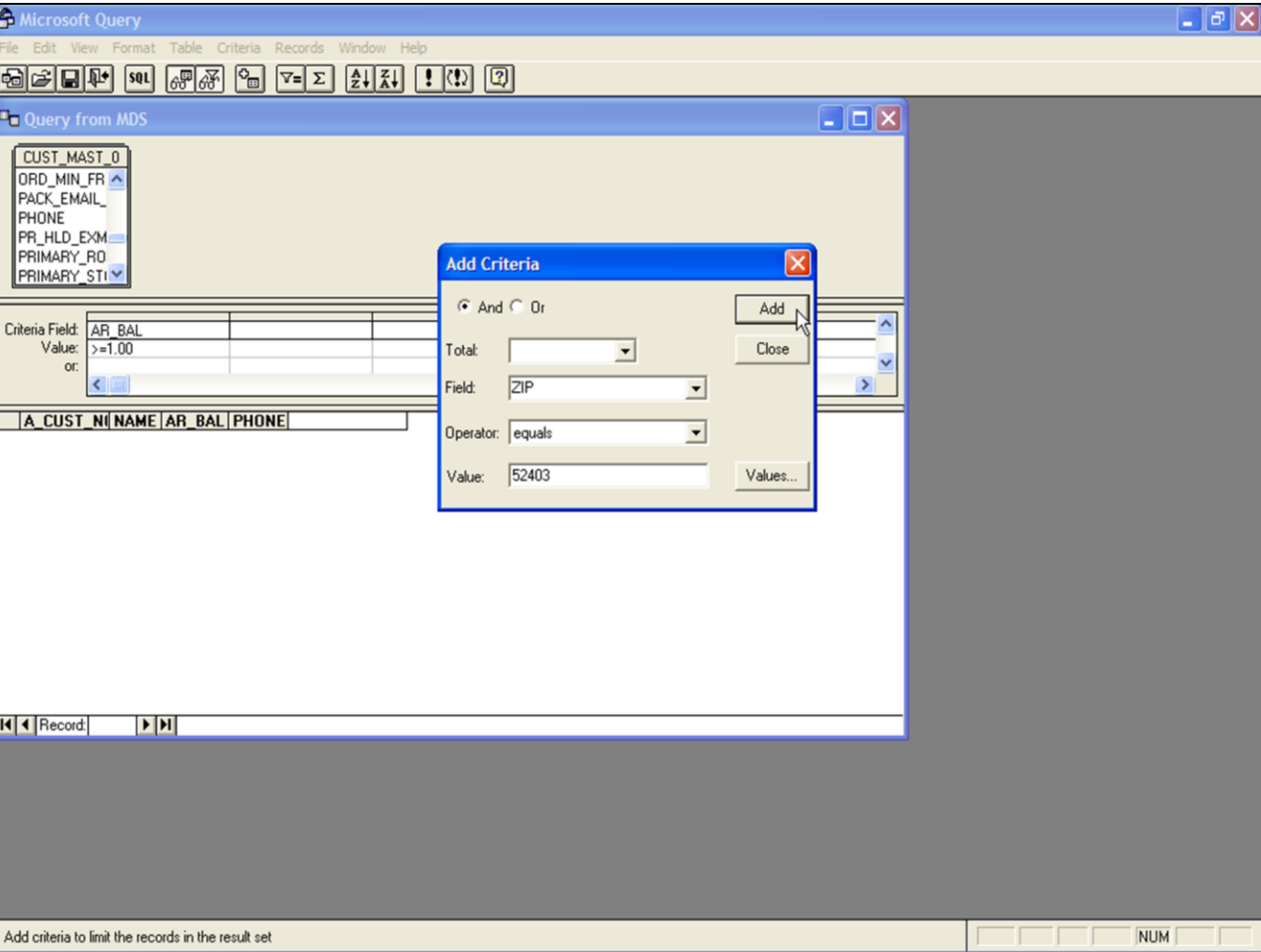When done adding a column, click on the "Insert" button.

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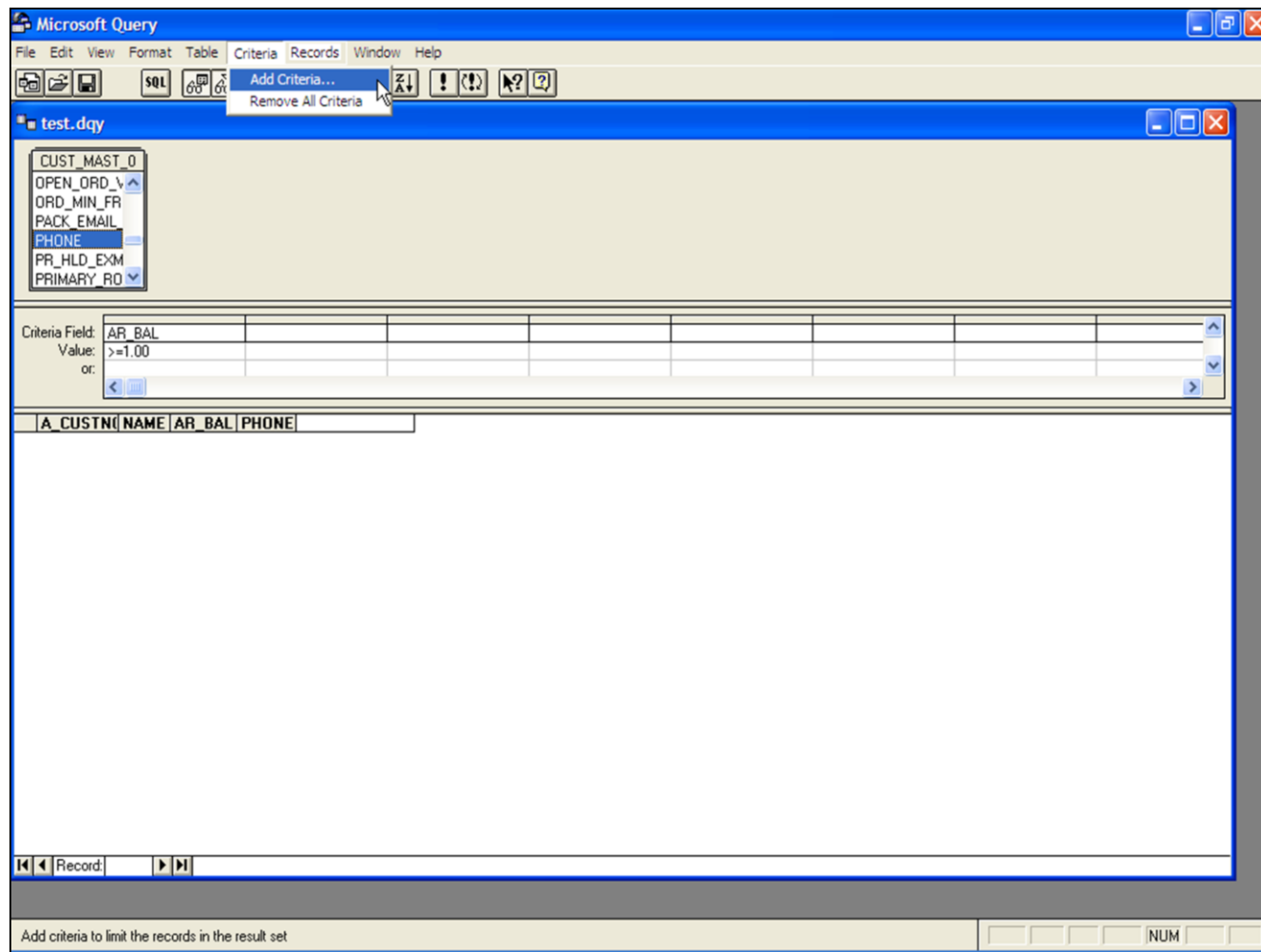
Editing a Query Through Excel

Criteria Options

From the toolbar, choose Criteria. From here you can add criteria or remove all criteria.

See the next slide to discussing adding criteria.

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The Systems House, Inc.

Editing a Query Through Excel

Add Criteria

Total – You can add a total selection, choices are: Sum, Avg, Count, Min, and Max. For this example, leave it blank.

Field – All fields in the table are displayed. For this example, click on the drop down arrow and choose "ZIP".

Operator – Choose a Operator selector, choices are: leave blank, equals, does not equal, is greater than, is greater than or equal to, is less than, is less than or equal to, is one of, is not one of, is between, is not between, begins with, does not begin with, ends with, does not end with, contains, does not contain, like, not like, is null, is not null. For this example, choose "equals".

Value – Enter a value. For this example, enter a valid zip code.

When finished, click the "Add" button.

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The Systems House, Inc.
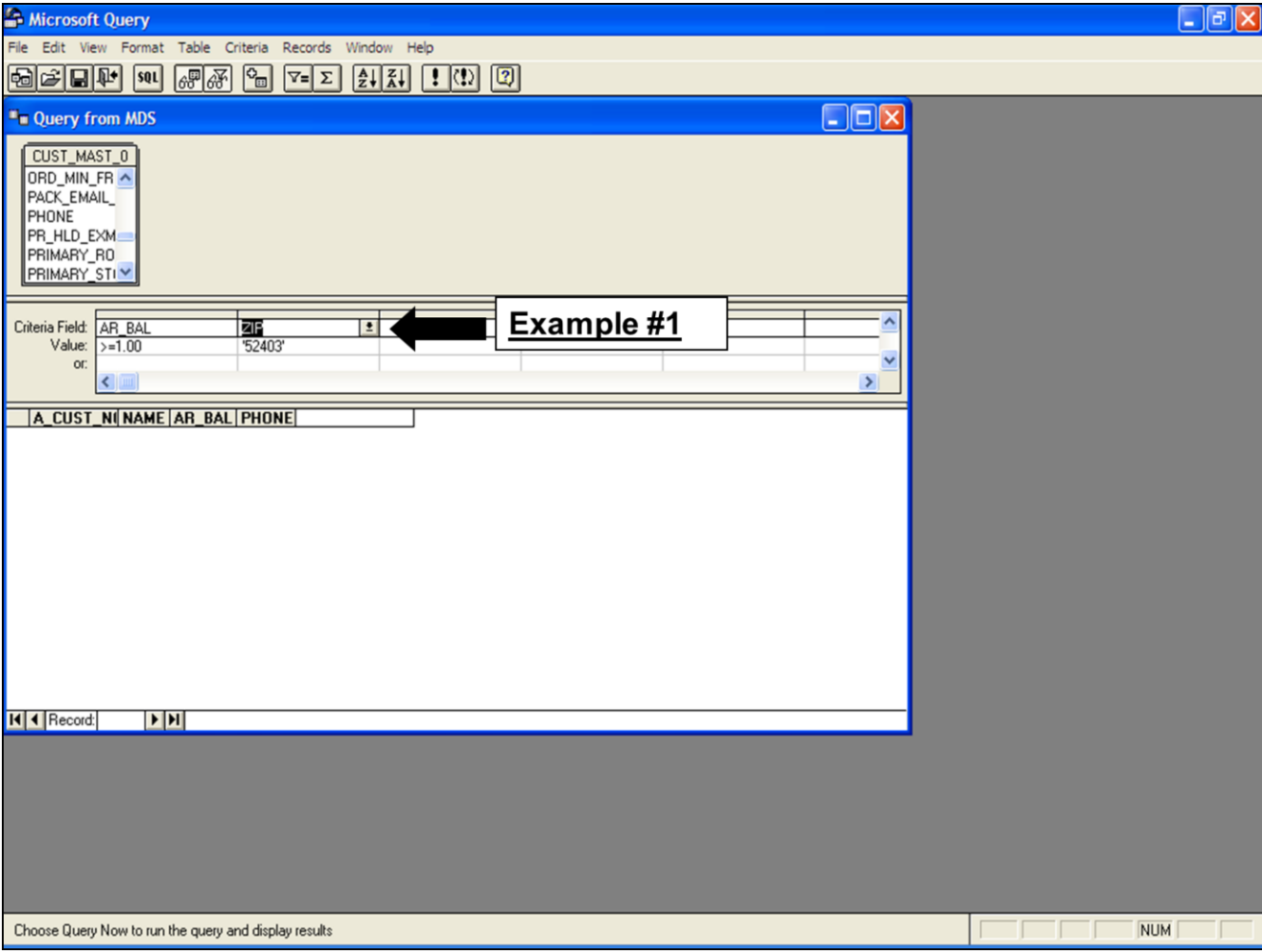
Editing a Query Through Excel

Changing Criteria

To change to an existing Criteria Field, you can click on the drop down arrow next to the field and choose a new field. See example #1.

To make a change to an existing Criteria Value, just click on the value you wish to change and overwrite it.
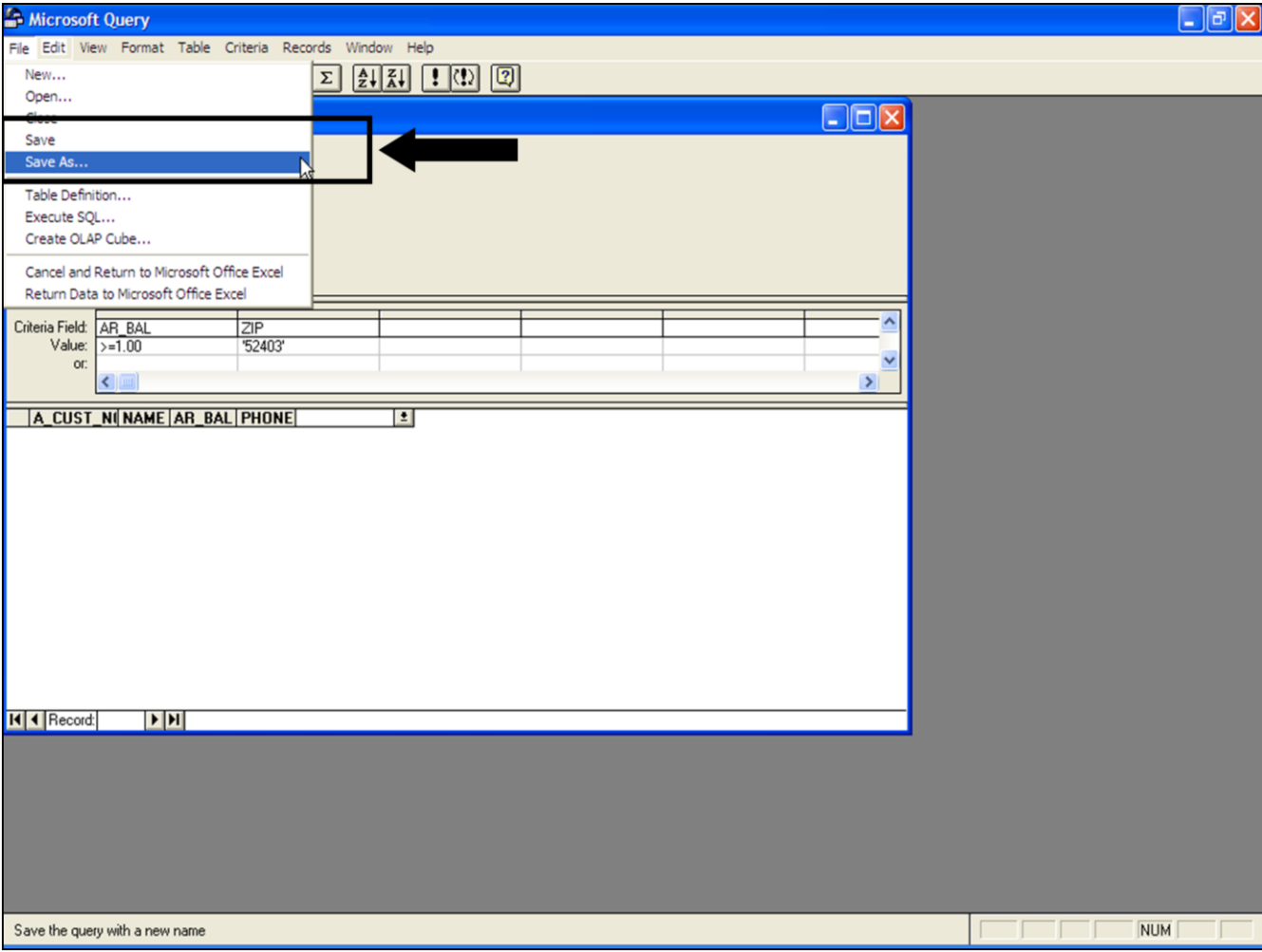
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The Systems House, Inc.
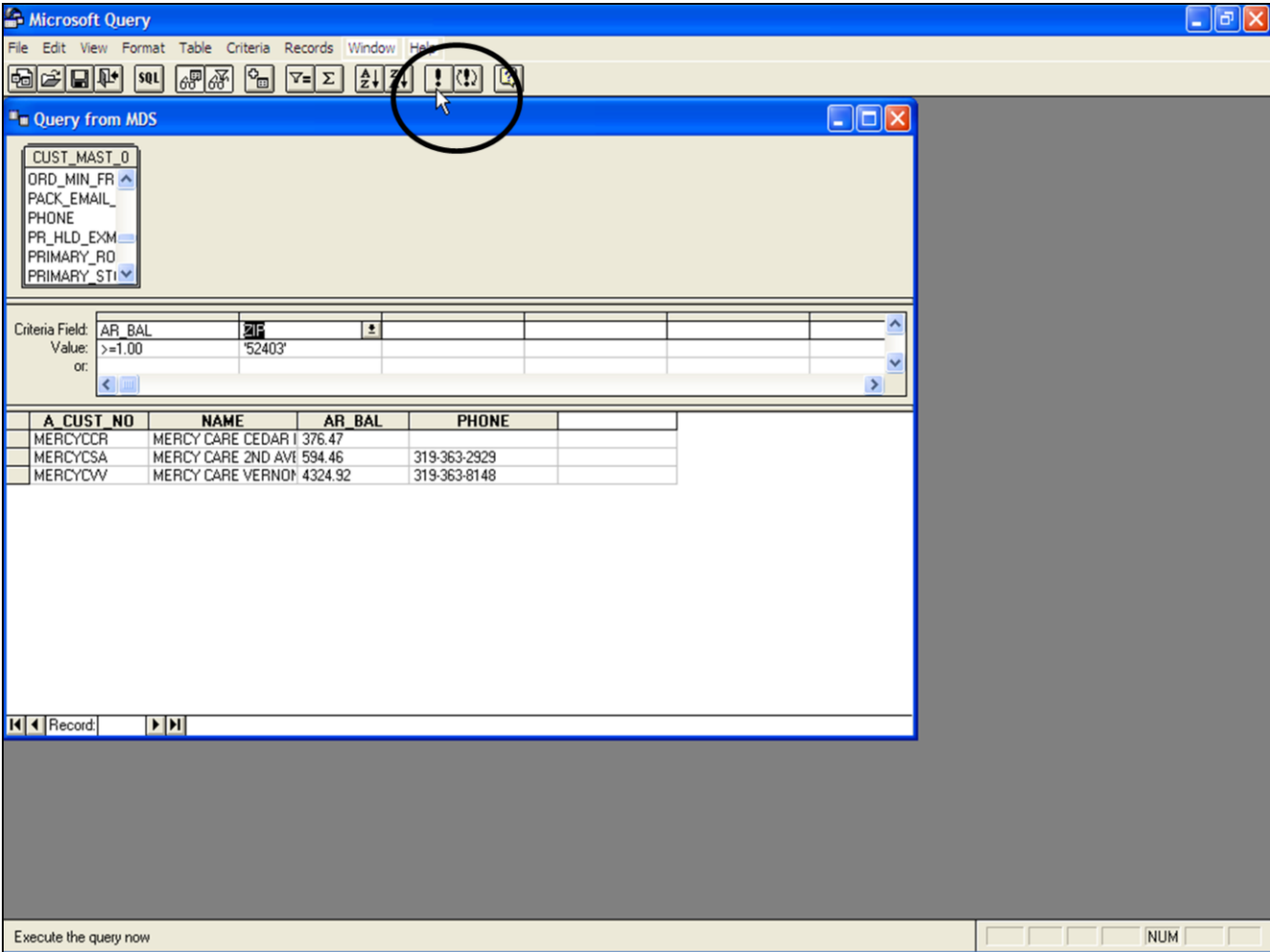
Editing a Query Through Excel

Running the Query

While in Microsoft Query, look for the button "(!)", this button is called "Auto Query". When this button is depressed, whenever a change is made to your query, MS Query will automatically refresh your query. This feature is best used when only running small queries. You can simply turn this feature off by verifying that the button is not depressed.

So, if the Auto Query feature is not enabled, you can simply run your query at anytime by clicking on the exclamation point. See the circled items.
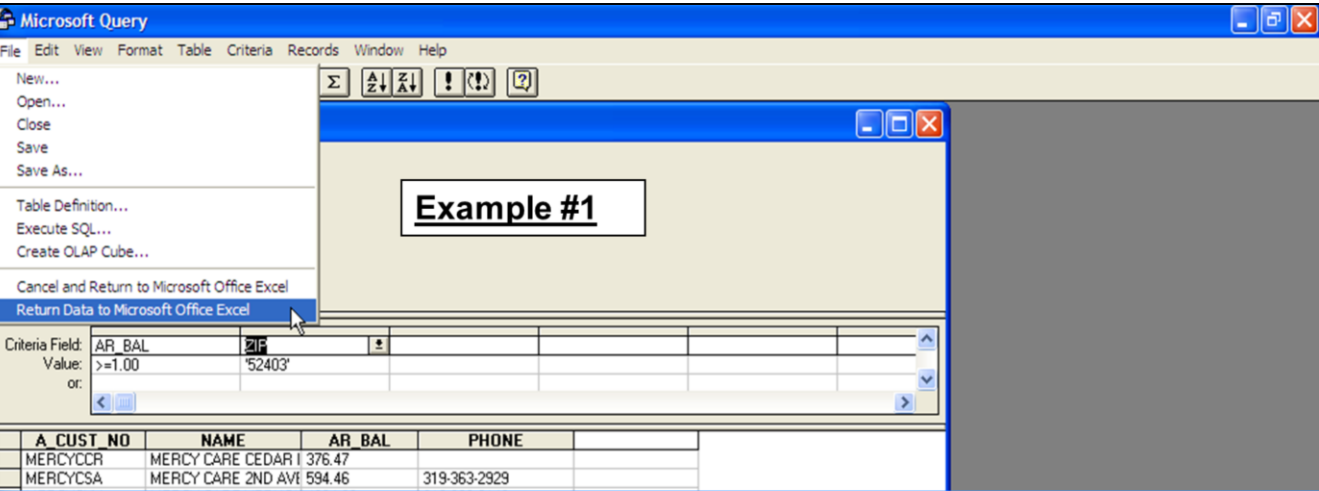
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The Systems House, Inc.

Editing a Query In Excel

Saving

After making your changes, you can save your query by clicking on "File" then choosing either "Save" or "Save As".
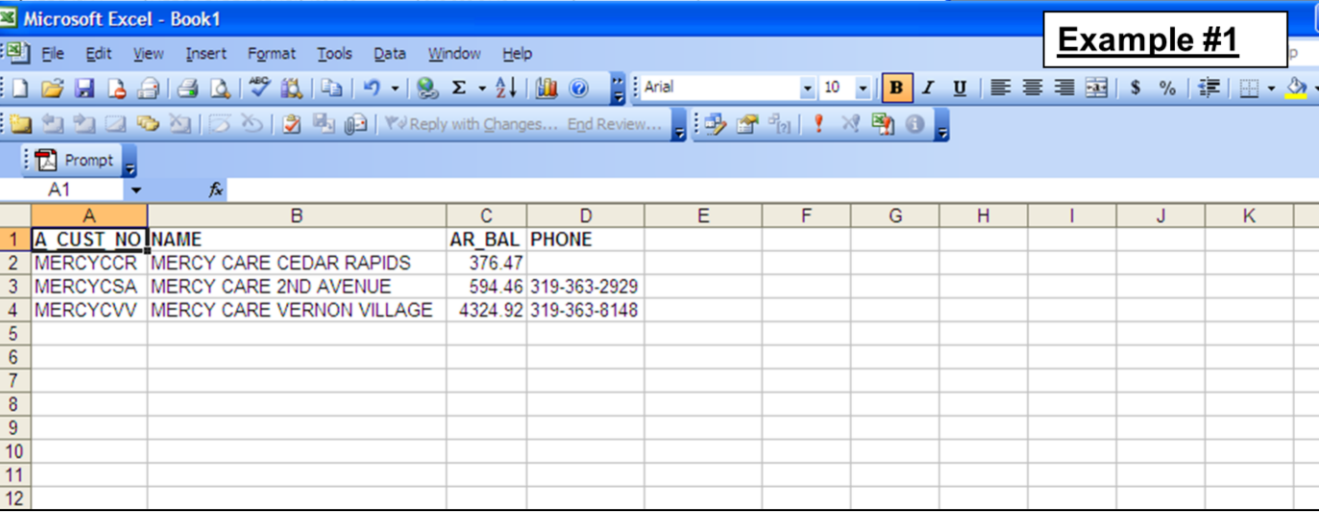
Notes:

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The Systems House, Inc.

Editing a Query Through Excel

Returning Data to Excel

To return the data to Excel, after making changes in Microsoft Query, click on File -> Return Data to Microsoft Office Excel. See example #1.

Example #2 shows the new information that was added.

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The Systems House, Inc.

Where to Get More Information

- To contact support call 973-777-8050 or fax 973-777-3063.
- To access the The System's House website the address is: www.tshinc.com.

Notes:

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