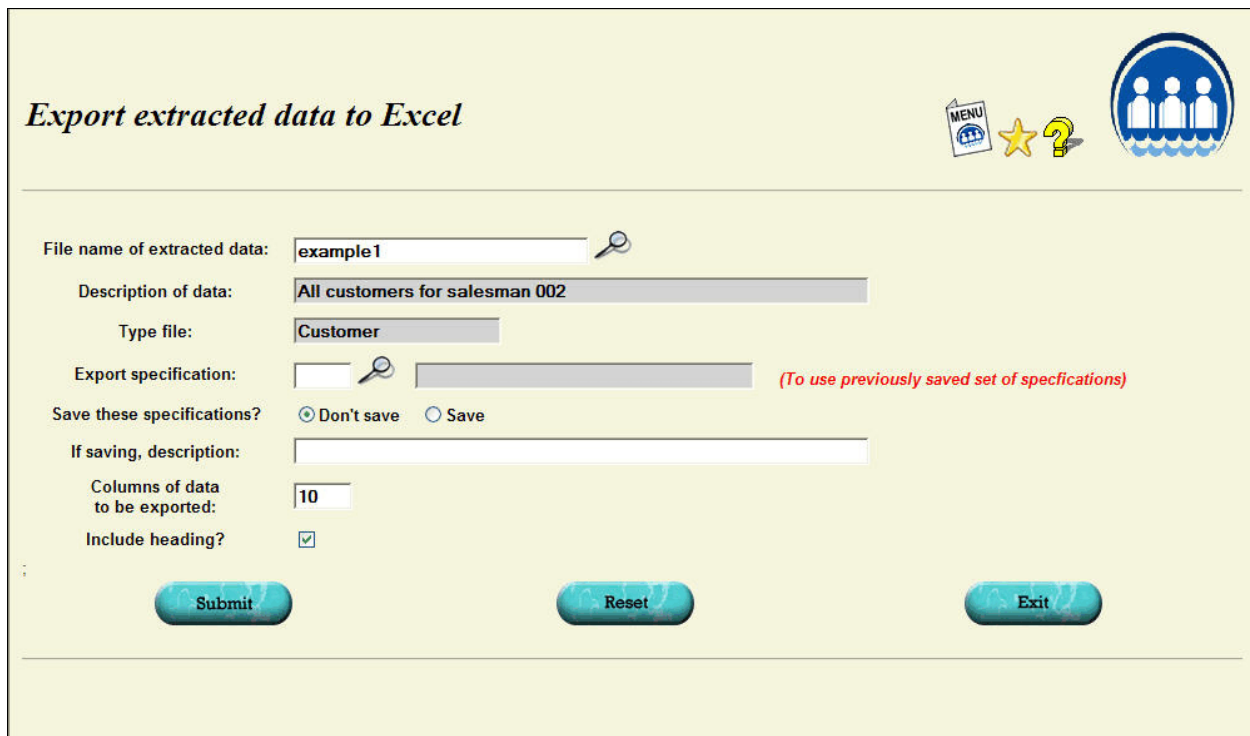


EXPORTING DATA FROM CREATE-A-REPORT

Last month's newsletter discussed how to extract data from your Lakeshore files. This month's newsletter covers how to export information from that extracted data to Excel or to a tab-delimited file.

To export the data to Excel, first do the extract step. Then, go to

Create-a-Report
Export extracted data to Excel



The screenshot shows a web interface titled "Export extracted data to Excel". The page has a light yellow background. In the top right corner, there are three icons: a "MENU" button, a yellow star, and a question mark, followed by a circular logo containing three stylized human figures. The main content area contains several form fields and buttons:

- File name of extracted data:** A text input field containing "example1" with a magnifying glass icon to its right.
- Description of data:** A text input field containing "All customers for salesman 002".
- Type file:** A dropdown menu showing "Customer".
- Export specification:** A text input field with a magnifying glass icon to its right, followed by a red text prompt: "(To use previously saved set of specifications)".
- Save these specifications?:** Two radio buttons: "Don't save" (selected) and "Save".
- If saving, description:** A text input field.
- Columns of data to be exported:** A text input field containing "10".
- Include heading?:** A checked checkbox.

At the bottom of the form, there are three blue buttons: "Submit", "Reset", and "Exit".

The screen for requesting the creation of a tab-delimited file instead of using Excel is similar except you are also prompted for the name of the file you want to create.


The **file name of extracted data** is the same file name you used in the extract step.











If you will be using the same export function repeatedly, you can save the **export specification** and call it back up. This keeps you from having to look up the all the data fields to be exported each time. These will all be filled in for you on the second screen described below.

In order to know how big to make the table on the second screen, you will need to enter the **number of columns of data to be exported**. Be generous in entering this number. If you enter 10 and then find you need 12 columns, you will have to exit and start over because you can't enlarge the table once you are on the second screen. It is OK to have more columns than you need so it is better to request a few more columns than you think you will need.

Once you submit your initial request, you will see a screen where you can specify the data you want included on the export. Here is a screen shot of a completed screen.

Export Customer data



Field #	Data field	Line	Begin Date	End Date	Literal
1	0650  Customer Number				
2	0649  Customer Name				
3	3800  Mailing Address - Line 1				
4	3801  Mailing Address - Line 2				
5	3802  Mailing Address - Line 3				
6	3803  Mailing Address - Line 4				
7	3804  Mailing Address - Line 5				
8	3838  Mailing Address - State				
9	3807  Mailing Address - Zip Code				
10	3805  Mailing Address - Line 6				

Submit Reset Exit

Data fields are selected by clicking on the look up icon to find the one you want to use. Or, if you know the field number, you can just type it in.

The following screen shots that were used in the extract step illustrate how to specify the salesman number as one of your selection criteria. The fields for the export step are selected the same way so the screens are repeated here so you can review them.

Note that you DON'T have to include all of the fields you want to export in the selection criteria of the extract step. If you want to export address information for the customers of one salesman, all the extract step will need as the selection criteria is the salesman number itself. The actual fields to be exported are included in this export step.

Look Up Data Element

Start with field

Submit Exit

customer/contact?

End with

Selection field

If you do not enter any selection criteria, ALL customers will be selected.

When you click on the look up icon, you will be prompted for a description of the field you want to use as one of your selection criteria.

Look Up Data Element

Selection level: Do you want to

Start with field

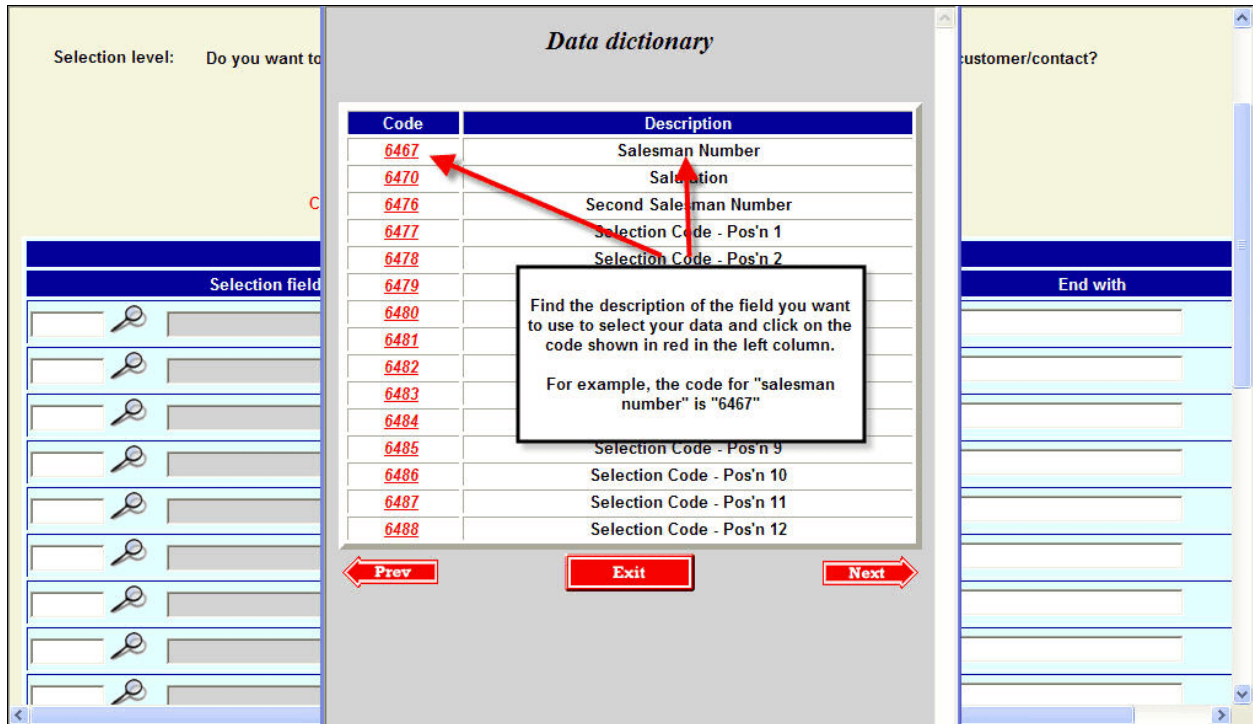
Submit Exit

customer/contact?

End with

Selection field

Enter a starting point. For example, to look up "salesman number", you can just type the word "salesman"



A few fields, like “year-to-date sales” will request that you enter a beginning and ending date or other information. You will have a prompt for any additional information you need.

Once you click submit, Excel will be called up and the extracted data put into the appropriate rows and columns on the spreadsheet screen. You can then save the Excel file and/or manipulate it as you would any other Excel file.

The procedure for exporting data to a tab-delimited file is the same except that the file will be created in the designated area. The export window will simply close and there will be no display on the screen.

Note also that most of the reference data such as chart of accounts, salesman, credit routines, etc. also have an Excel option that you can use without going through the extract step. Just click on the Excel button on the screen.

Also, many row/column type displays and reports also have an Excel option. For example, you can export A/R detail, the A/R aging report, and general ledger data to Excel by simply clicking on the Excel button instead of one of the print buttons.