

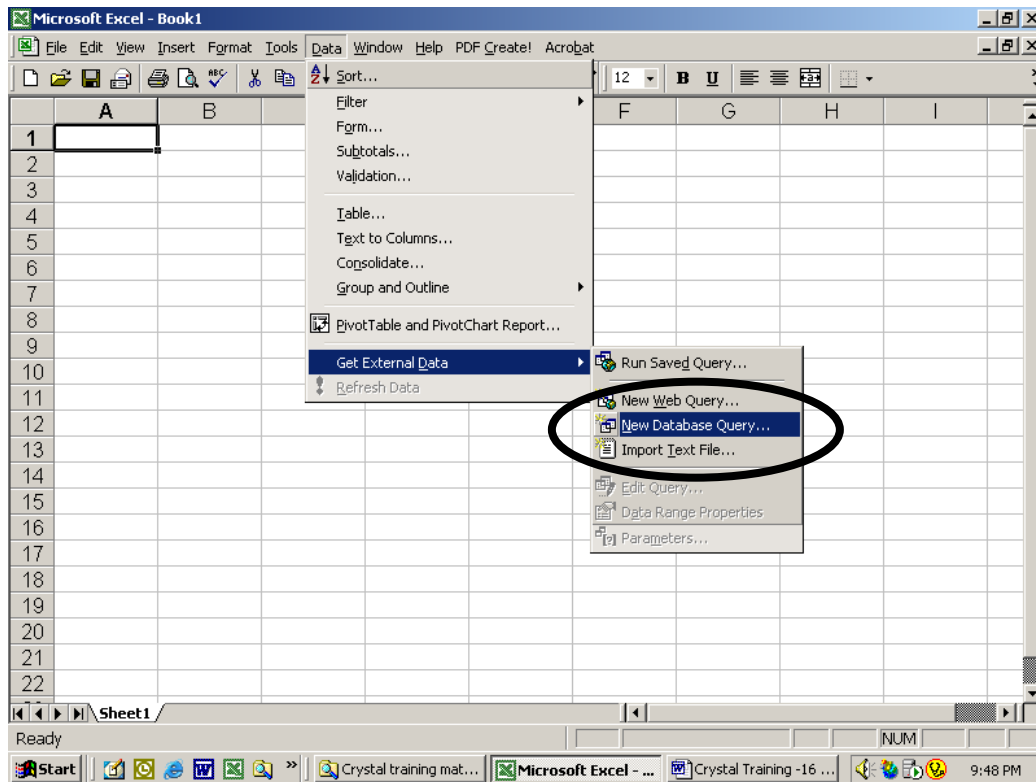
How do I use Excel to Extract Data Directly from Macola?

(Updated 12-07)

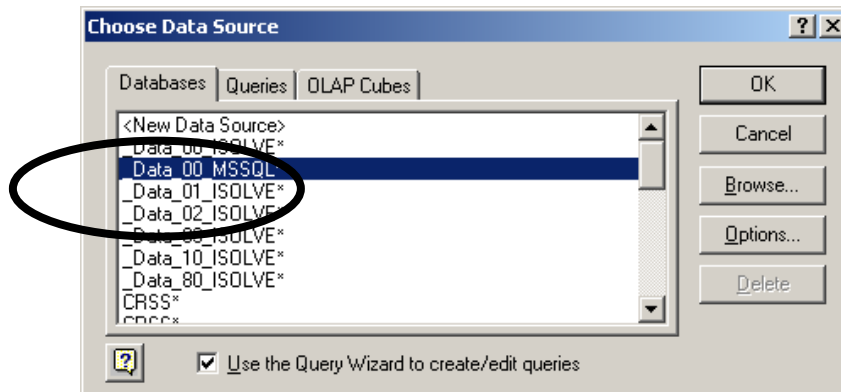
The ability to use Excel to extract data directly from Macola and develop simple reports has huge benefits. Since you are probably already comfortable using Excel, your learning curve to use this powerful tool will be much less than learning the Crystal Reports software. Once you export the data you need, you can then use Excel to manipulate the results for further analysis.

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Cincinnati, Ohio office of the Esta Group.

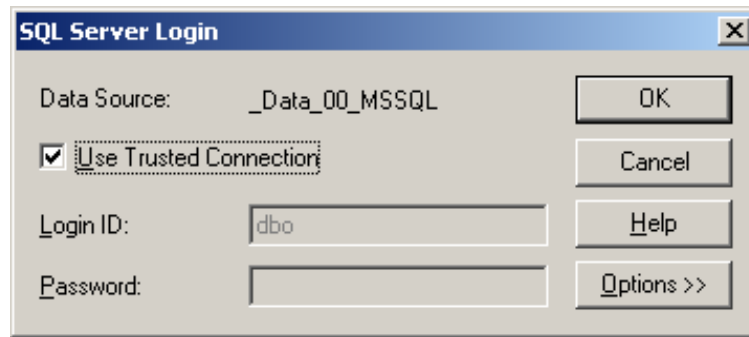
1. Open Excel and start a blank spreadsheet.
2. Go to > Data > Get External Data > New Database Query. NOTE: The very first time you run this program, it may display an error message telling you to insert your master CD-ROM for the Microsoft Office software. It will take about 10 seconds to install it and you can continue.



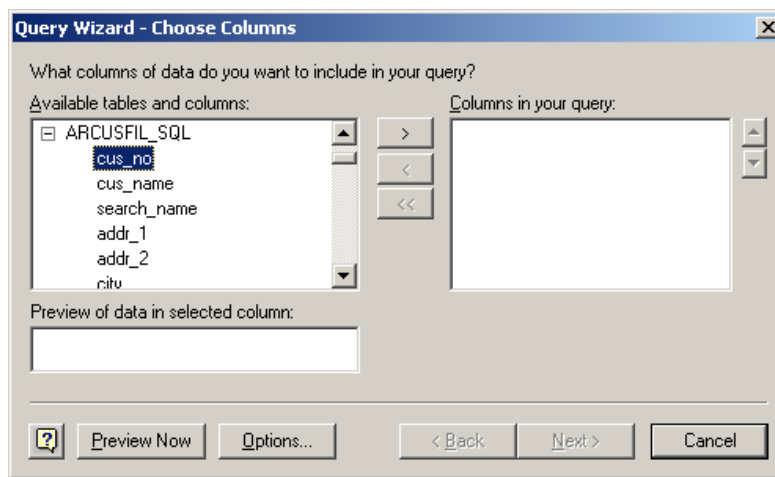
3. Choose the name of your Macola database. Choose the one that contains the words "MSSQL".



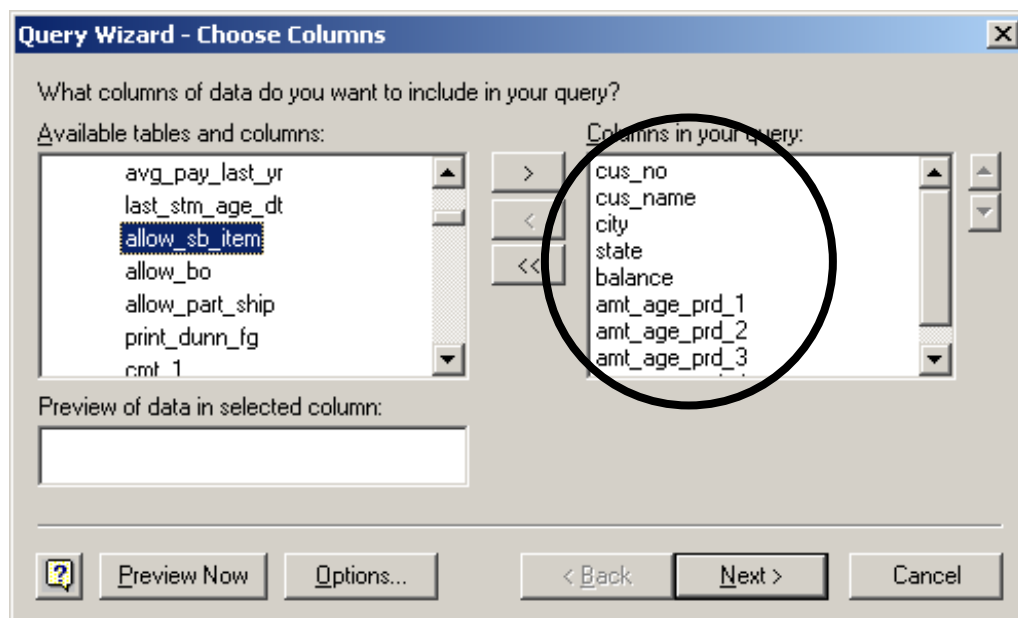
4. Log into your SQL database or click on “use trusted connection”, whichever is applicable to your network.



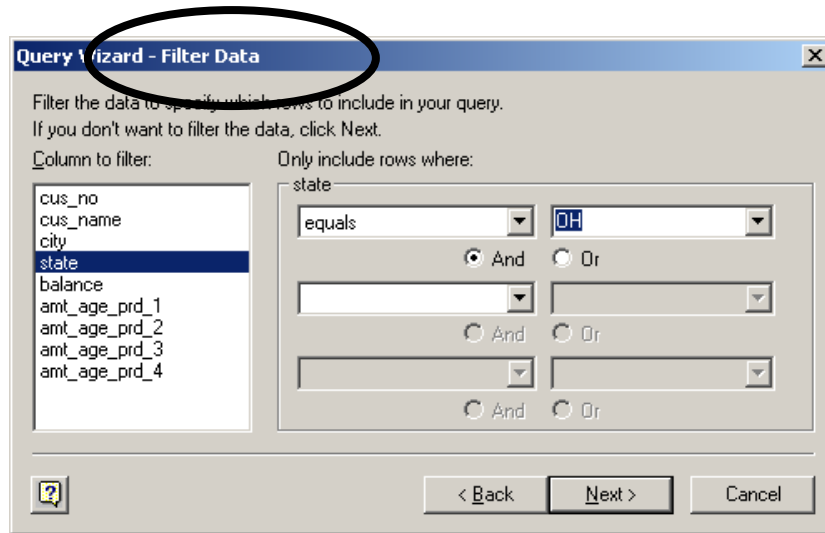
5. Select the name of the data file. For example, the customer file (ARCUSFIL). Click on the “+” sign to display the data fields.



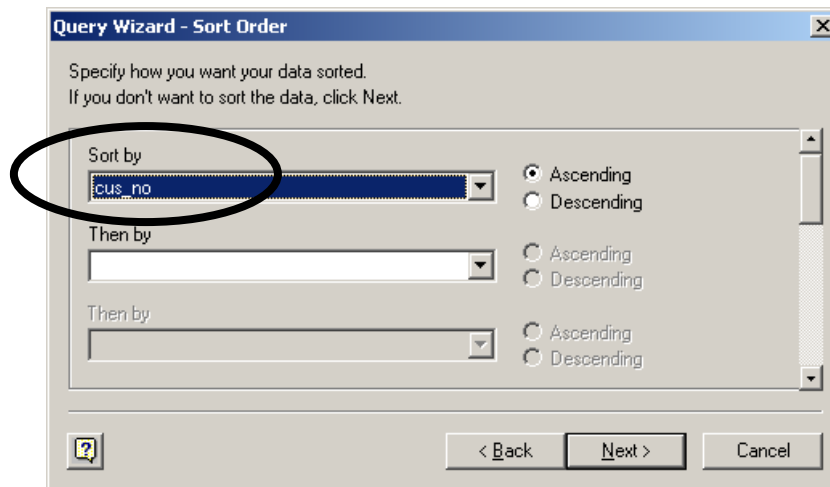
6. Select the data fields for your report. You can double-click on the field name or highlight the field name and click on the “>” symbol to select the field. You can use the up and down arrows icons on the right side to re-sequence the order of the fields.



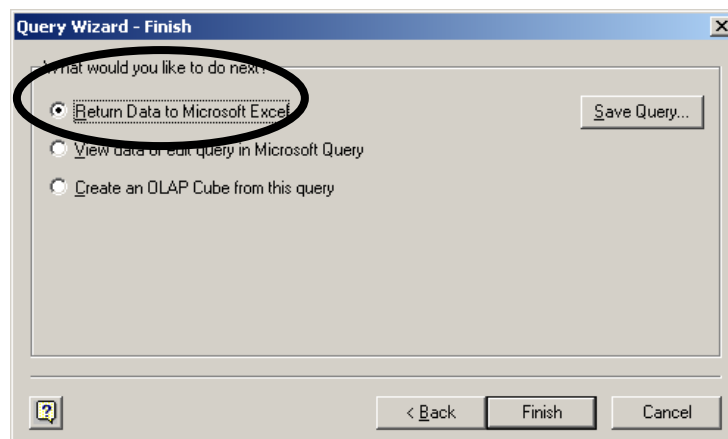
- When you are finished selecting the fields, click on the “Next” button. The “filter wizard” screen will now appear. This screen will allow you to refine your selections (ex. only customers in the state of Ohio). If you want to filter based on multiple criteria (ex. state of Ohio and balance greater than \$1,000), key in the first filter (state) and then click on the next filter (balance).



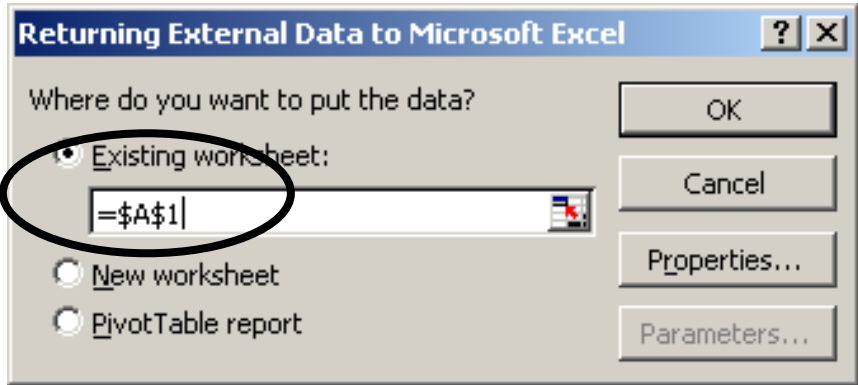
- Click on the “Next” button to use the “sort order” wizard. This will allow you to sort your report (ex. sort by customer number).



- Click on the “next” button. The “finish” screen will appear. Be sure that the “Return data to Microsoft Excel” button is on.



10. At this point, another screen will appear asking you where you want to place the report on your spreadsheet. Click on the “OK” button to place the report in cell A1 or click on the cell in the worksheet where you want the data to be placed.



11. Your report will now appear on the Excel screen. At this point, you should save the spreadsheet. You can then use it as-is or further manipulate the data.

The image shows a screenshot of the Microsoft Excel application window. The title bar reads "Microsoft Excel - Book1". The menu bar includes "File", "Edit", "View", "Insert", "Format", "Tools", "Data", "Window", "Help", "PDF Create!", and "Acrobat". The toolbar contains various icons for file operations and editing. The spreadsheet area shows a table with the following data:

	A	B	C	D	E	F	G
1	cus_no	cus_name	city	state	balance	amt_age_prd_1	amt_age_
2	*MISC	Miscellaneous		OH	0	0	
3	000000000500	Ohio Electronics Company	Akron	OH	677.7	0	
4	000000001100	Metals Basket	Columbus	OH	0	0	
5	000000001200	Metals Menders	Columbus	OH	0	0	
6	000000001300	Plastic Plating	Columbus	OH	0	0	
7	000000002000	Acme Plating	Marysville	OH	0	0	
8	000000002001	Ejers Supply	South Bend	OH	0	0	
9	000000003000	WPS, Inc.	Marion	OH	0	0	
10	000000003110	MJH, Inc.	Marion	OH	0	0	
11	000000003120	JRL, Inc.	Marion	OH	0	0	
12	000000003130	JSS, Inc.	Marion	OH	0	0	
13	000000003140	TSM, Inc.	Marion	OH	0	0	
14	000000003150	JA Enterprises	Marion	OH	0	0	
15	000000003160	KHB Enterprises, Inc.	Marion	OH	0	0	
16	000000003170	KJJ, Inc.	Marion	OH	0	0	
17	000000003180	DMK, Inc.	Marion	OH	0	0	
18	000000003190	BAH, Inc.	Marion	OH	0	0	
19	000000003200	CAN Enterprises	Marion	OH	0	0	
20	000000003210	SAV, Inc.	Marion	OH	0	0	
21	000000003220	TWD, Inc.	Marion	OH	0	0	
22	000000003230	CAP Enterprises	Marion	OH	0	0	

The status bar at the bottom shows "Ready" and "NUM".

