

Article # 1146

Technical Note: Maximizing the Use of the Table Browser and Exporter

Difficulty Level: Intermediate Level AccountMate User

Version(s) Affected: AccountMate 7 for SQL, Express and LAN
AccountMate 6.5 for SQL, MSDE and LAN

Module(s) Affected: SM

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DESCRIPTION

The **Table Browser & Exporter** function lists all tables of the company database that is currently open and lets the user browse and export them, provided that the user has access. Browsing AccountMate tables is useful when the user is verifying information or evaluating data to fix data corruption. Exporting data is like copying the data; it does not affect the data in the source table.

This document is intended to enhance the user's understanding of the **Table Browser and Exporter** function to facilitate a more efficient use of this feature.

SOLUTION

User Access

The **Table Browser and Exporter** function is accessible to authorized users only. User access is set up in the **Group/User Setup** function in the Administrator Program.

These tables will not appear in the **Table Browser and Exporter** window if a user is restricted from accessing certain tables.

Selecting a Table to Browse

When the user accesses the **Table Browser and Exporter** function, the records in each table come from the company database that is currently used. Table descriptions are provided for easy identification. Generally, the table names begin with the module related to the table. For example, the AR Invoice File is ARINVC. Further, any table that ends with 'H' is a history table.

In AccountMate for LAN versions, the system allows the user to open Visual FoxPro tables (*.dbf) other than those that are part of the company data using the **Other**

Data File option. The location of the file must be entered in the blank field below the caption.

To open a table to browse or export, the user must select a table and click the **OK** button.

Defining the Fields

After selecting a table to browse, another window will open displaying the fields in the table. The fields represent various kinds of data stored for each record in the table.

To view all the data in the table, mark the checkboxes for all the available fields; otherwise, click the **Unmark All** button and then mark the checkboxes for the specific fields as needed.

Setting the Criteria

The user can filter the data using the Criteria section. This is useful when there are numerous records in the table and the user only wants to view records with specific types of information. The user is given a maximum of five criteria options with which to filter the data and can set up the criteria using any of the fields available in the table selected. This section should be left blank if the user wants to view all records.

In setting the criteria, conditions must be set correctly to generate the desired results. The user must understand each mathematical function in the Compare and AND/OR fields:

- < - All records lesser or lower than the value entered will be displayed;
- > - All records greater or higher than the value entered will be displayed;
- = - All records equal to the value entered will be displayed;
- >= - All records greater or equal to the value entered will be displayed;
- <= - All records lesser or equal to the value entered will be displayed;
- >< - All records other than the value entered will be displayed;
- LIKE - (Applies to AccountMate for SQL versions only) All records that contain the value that is specified will be displayed. A '%' usually accompanies the value entered and the percentage sign may be entered either before or after the value, depending on the desired output.

The 'AND' and 'OR' options must be used if another criterion is added. Use 'AND' if all the specified criteria must be met to show the record(s). Use 'OR' if the two successive lines are mutually exclusive which means that either one of the specified criteria must be met to show the record(s) when browsing or exporting data.

For example: A user selects the Customer file (ARCUST) and wants to review or export records with addresses that have Zip codes falling in the range of "91901" through "91905".

The following criteria must be set: On the first line, select the Field Name "ZIP" and use the greater-than-or-equal-to (>=) function in the Compare column. Enter "91901" in the Value column and select "AND" in the AND/OR column. On the next line, select the Field Name "ZIP" again but this time use the "less-than-or-equal-to" (<=) function in the Compare column. Enter "91905" in the Value column and leave the AND/OR column blank.

Analyzing the Information

Once the specific fields and criteria are defined, you can now view or export the desired records. To view the records, click on the **Browse** button; to export records, click on the **Export** button.

Sorting the data varies between versions. In AccountMate for SQL versions, any field available in the table can be sorted using the **Order** tab. In AccountMate for LAN versions, sorting is limited to the available sorting options in the Browse [XXX] Table window's **Order by** field when the system displays the records.

Some tables have values that are logical in nature. For instance, the **Transfer to GL** field in some tables has an X value to signify that the record has been transferred to GL. In AccountMate for SQL versions, a column containing a '1' or '0' value would mean a true or false statement respectively; while AccountMate for LAN versions uses either a 'T' or 'F' value.

AccountMate for LAN versions allows the user to amend values using the Table Browser and Exporter because LAN data uses Visual Fox Pro tables that are also being accessed by AccountMate's **Table Browser & Exporter** function. Advance users should exercise caution when amending data using the Table Browser and Exporter to minimize the risk of data corruption. Among the types of data corruptions that may occur due to the improper use of the Table Browser and Exporter are:

1. Blank records or values
2. Out-of-balance issues
3. Double entries
4. Related tables not updated correctly
5. Invalid data
6. Inaccurate amounts

In AccountMate for SQL versions, users are limited to browsing and exporting data because data for these versions uses Microsoft SQL.

Exporting the Data

The **Table Browser and Exporter** function can export data in the following file format:

1. MS Excel (xls)
2. Visual Fox Pro (dbf)
3. Lotus 1-2-3 (wk1)
4. Text (txt)

Note: When exporting to Excel format, you can export a maximum of 65,535 rows, which includes one row reserved for the field header; however, versions of Excel earlier than Excel 97 display only the first 16,384 rows and cannot import files containing more than 32,767 rows.

To export the data, the user must select the type of file that will be exported; then, enter in the **To** field the destination where the file will be exported. Alternatively, he/she can click the **Ellipsis** button to browse for the desired location where the file is to be exported.

Understanding the Table Browser and Exporter's capabilities should help the user to effectively and efficiently evaluate data and export records. A better understanding

of the potential risks involved should also help users to be more cautious when using this function if they are on AccountMate for LAN.

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