

User Export Formats

Creating Your Own Export Formats

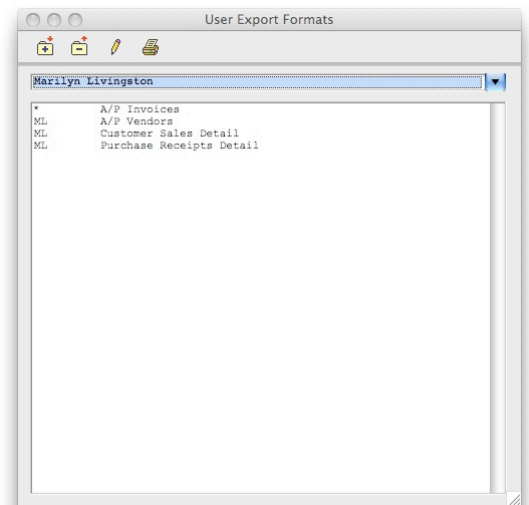
You may wish to either create reports that are not available in VisionX, or manipulate its data into Microsoft Excel for graphing purposes for example.

VisionX allows you to create your own export formats and save them for further use. Each export format may be made public or kept private, assigned to an individual VisionX user.

The User Export Formats window displays the currently logged on User formats as well as all public formats (*).

The usual New, Delete, Edit, and Print icons are available at the top of the window.

By clicking the New or Edit button you open a window that allows you to enter the format parameters.

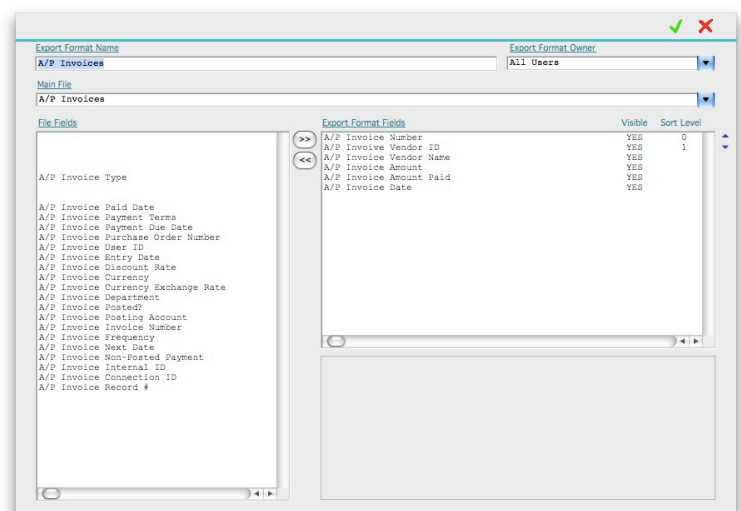


Type the Export Format Name and select who is allowed access to it.

By default the owner is yourself but you may either assign the format to another VisionX user or to All Users.

Then select the Main File to be exported. Here we selected the Accounts Payable Invoices file. Once a file is chosen the program automatically fill the File Field List at the left side of the window.

You may then select which field you want to include into the export file by selecting the field line and clicking on the >> button.



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This triggers the field name to be moved to the Export Format Field list on the right side of the window. You may unselect fields by selecting their line in the right list and clicking on the << button.

The Export Format Fields order may be modified by clicking on the up or down arrows located on the right side of the list.

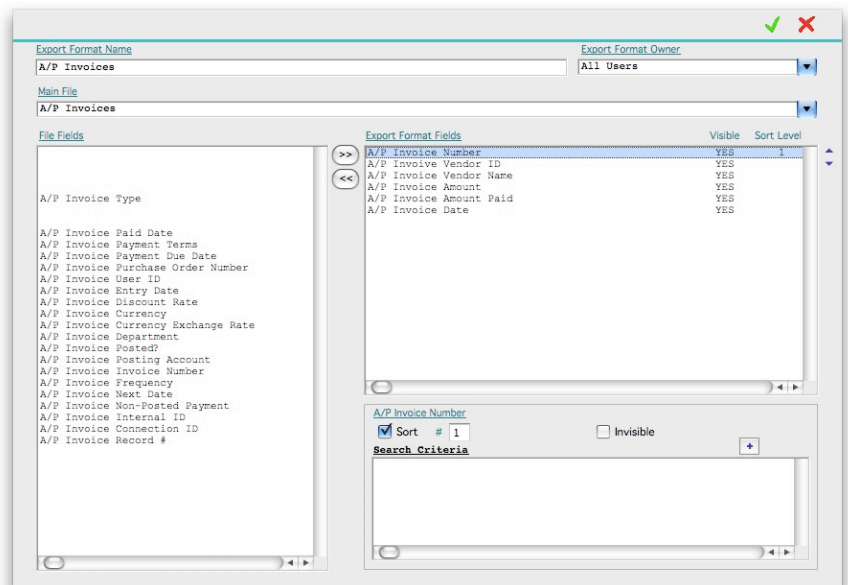


Once you have selected all the desired fields you may start specifying how the export file has to be sorted and if it only includes a limited portion of the file records.

Clicking on a line in the Export Format Fields list prompts the program to display the field parameters.

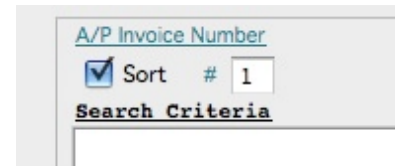
The available parameters are:

- Sort
- Invisible
- Search Criteria



Export Formats build lists of records. By default these lists are sorted by sequential order meaning that the first record that was added to the file will be at the top of the list and following records will be listed in the order that have been entered into VisionX.

You may alter this order by designating sort fields. Each Export Format may have up to 8 sort fields.



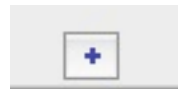
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Click on the Sort check box to designate a field as a sort field. The program automatically assign the sort order number according to the already designated sort fields. You may overwrite this number prompting VisionX to renumber previously defined sort fields if necessary.

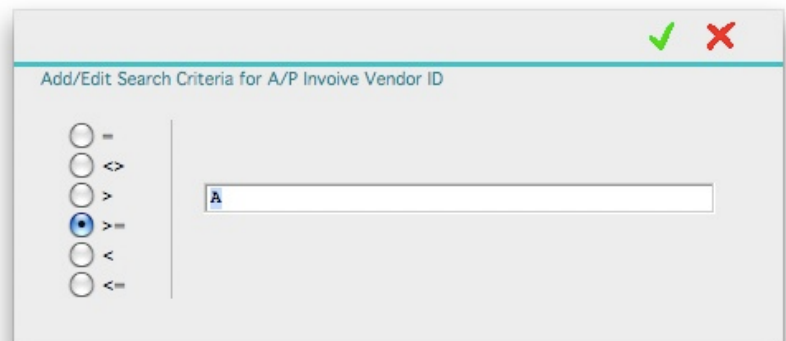
The Invisible option allows you to include fields that are used to sort or search the data file and to exclude them from the actual export file.

You may use the field for reducing the export file to a specific range of records. One or more search criteria may be specified for this purpose.

Click the + button above the Search Criteria list.



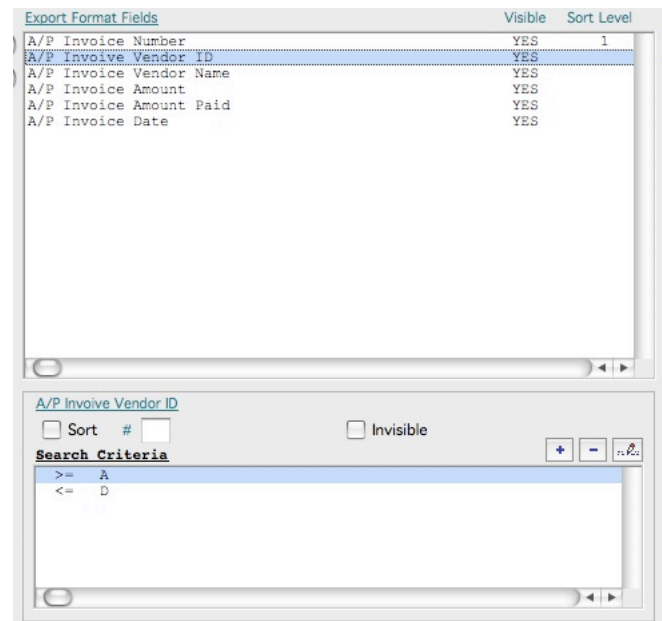
The Add/Edit Search Criteria window allows you to enter the condition the field record has to match in order to be included into the Export File.



In the example at right we want the field 'A/P Invoice Vendor ID' to be greater or equal to 'A', meaning that invoices for vendor whose ID starts with the letter A or greater will be included in the Export File.

In this case we will want a second Search Criteria that will limit our search on its bottom end, something like Vendor ID lesser than D.

The resulting Export File will then only include invoices from vendors whose ID starts with an A, B, or C.



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Two consecutive search criteria using the equal (=) sign will be treated as if linked by a OR function. Otherwise they will be treated as if linked by a AND function.

Examples for the A/P Invoice File:

<u>Search Criteria</u>	<u>Resulting Export File</u>
Vendor ID = ABC	All invoices from vendor ABC
Vendor ID = ABC Vendor ID = FIRST	All invoices from vendor ABC and all invoices from vendor FIRST
Vendor ID >= A Vendor ID < C Vendor ID <> ABC	All invoices from vendors whose ID starts with A or B, except vendor ABC