

HOW TO FTP DAISY ACCESS REPORTS TO AN EXCEL SPREADSHEET

To FTP Daily Receipts (Site Receipts Report, DEMIL Codes Report and No Noun and/or Item UP Report) reports:

1. OPEN THE FTP ICON ON YOUR PC DESKTOP. FILL OUT THE SCREEN AS FOLLOWS:

Profile Name: rcp

Host Name: rcp

Host Type: Automatic Detect

User ID: Your login

Password: Your DAISY password

Tab down to:

Remote Host: /prod/daisydrmo/data/S9W/WIDE/S9W__(YOUR S9W RIC)

Local PC: drive where you want to copy into (usually C:)

HIT OK.

THE LEFT SIDE OF THE SCREEN IS WHERE YOU'LL COPY THE REPORTS INTO (YOUR LOCAL PC DRIVE). THE RIGHT SIDE IS WHERE THE DAISY REPORTS ARE KEPT.

2. ON THE RIGHT SIDE, HIGHLIGHT THE THREE RECEIPT REPORTS (HOLD THE CONTROL KEY & CLICK ON EACH):
udicS9W_.1xxx (for Site Receipts Reports; the "xxx" equals the report Julian date).
udicS9W_.2xxx (for DEMIL Codes Report)
udicS9W_.3xxx (for No Noun and/ or Items UP Report)
NOTE:IF YOU NEED TO PULL PRIOR DAY'S REPORTS (NOT THE CURRENT DAY'S), GO "SEEN" INSTEAD OF "WIDE" IN THE REMOTE HOST (STEP 1, ABOVE), THEN TO "WIDE", THEN YOUR RIC.
3. IN THE MIDDLE OF THE SCREEN, HIGHLIGHT THE ARROW POINTING LEFT (<). YOUR PC WILL COPY THE THREE HIGHLIGHTED REPORTS INTO YOUR PC DRIVE. THERE SHOULD BE AS MESSAGE AT THE BOTTOM "TRANSFER COMPLETE". EXIT FTP.
NOTE: FTP OVERWRITES EACH DAY'S REPORTS OVER WHAT IS IN YOUR PC DRIVE, WHICH IS OKAY BECAUSE YOU WILL PUT EACH REPORT INTO AN EXCEL SPREADSHEET EVERYDAY.
4. BRING UP THE REPORTS IN EXCEL SPREADSHEET:
OPEN EXCEL, GO TO THE DIRECTORY YOU FTP'D THE REPORTS INTO (USUALLY C:\). CLICK ON "ALL FILE" AT THE BOTTOM OF THE SCREEN OR YOU WON'T SEE YOUR UDIC REPORTS SINCE THEY DON'T HAVE AN .XLS EXTENSION.
HIGHLIGHT THE THREE UDIC REPORTS BY HOLDING THE CONTROL KEY WHILE CLICKING ON EACH.
HIT OPEN.

5. OPEN EACH FILE AS FOLLOWS:
AS A FIXED WIDTH COLUMN FILE (CLICK ON THAT BOX). CLICK ON "NEXT" AT THE BOTTOM. THE NEXT SCREEN IS WHERE YOU INDICATE WHERE YOU WANT THE COLUMNS SEPARATED. ARROW DOWN INTO THE REPORT AND CLICK BETWEEN THE COLUMNS SO A LINE APPEARS ON THE SCREEN. WHEN YOU'RE DONE CLICK "NEXT". THE LAST SCREEN, HIT "FINISH".

NOTE: IF YOU GO TO "WINDOW" ON THE MENU, YOU WILL SEE THE THREE FILES ARE OPEN AND THE ONE YOU'RE CURRENTLY WORKING WITH HAS A CHECK MARK BY IT.

6. HIGHLIGHT THE ENTIRE SPREADSHEET AND ADJUST THE COLUMN WIDTHS BY CHOOSING FORMAT, COLUMN, AUTOFIT SELECTION FROM THE MENU. IN THE FILE, PAGE SETUP, CHANGE IT LANDSCAPE ORIENTATION, AND CHANGE THE SCALING TO 85%. CHANGE MARGINS FOR THE LEFT AND RIGHT TO "0". ON THE SHEET TAB, CLICK ON "GRIDLINES".
FOR THE SITE RECEIPTS SPREADSHEET, ADD TWO (2) AT THE END FOR "SLH CODE" AND "DATE". INDICATE NEXT TO EACH DTID THE ONES THAT NEED TO BE SLH'D WITH REASON CODE (DON'T PUT A CODE IF THE ITEM DOESN'T NEED TO BE SLH'D WITH REASON CODE (DON'T PUT A CODE IF THE ITEM DOESN'T NEED TO BE SLH'D) AND THE JULIAN DATE TO SLH IT (IF IT WILL BE SCREENED, INPUT THE FORMULA "+321 (CURRENT JULIAN DATE) + 42". THE COMPUTER WILL COMPUTE THE JULIAN DATE TO SLH THE ITEM (363 FOR THIS EXAMPLE, OR DEC 28). IF IT SHOULD BE SLH'D UPON RECEIPT, INDICATE "TODAY".

7. SAVE THE REPORTS (SAVE AS):

FIRST, MAKE THREE (3) NEW FOLDERS IN YOUR C: DRIVE NAMED "SITE RECEIPTS", "DEMIL RECEIPTS", AND "NO NOUN OR UP RECEIPTS".

SAVE (AS) THE SITE RECEIPTS SPREADSHEET AS "S321" ("S" FOR SITE RECEIPTS, 321 IS DATE) IN YOUR RECEIPT FOLDER. THE COMPUTER WILL ADD AN .XLS EXTENSION.

SAVE (AS) YOUR DEMIL CODES SPREADSHEET IN YOUR DEMIL RECEIPT FOLDER AS "D321".

SAVE (AS) YOUR NO NOUN OR UP SPREADSHEET IN YOUR NO NOUN OR UP RECEIPT FOLDER AS "N321".

EACH DAY, SAVE EACH OF THE THREE (3) SPREADSHEETS WITH THE JULIAN DATE IN THE NAME.

8. SEND THE RECEIPT REPORT EVERY DAY WITH YOUR SLH'S ANNOTATED:
FROM EXCEL, GO TO "FILE" ON THE MENU, "SEND TO", MAIL RECIPIENT".
TYPE IN "TO" BOX: CAMPBELL, YVONNE
TYPE IN "SUBJECT": NOV 17 RECEIPTS FOR NORFOLK.
CLICK ON THE "SEND" BUTTON.
EXIT EXCEL

NOTE: YOU CAN ALSO SEND FROM OUTLOOK AS IN ATTACHMENT:

CLICK ON "SEND A NEW MESSAGE" ICON.

TYPE IN "TO" BOX: CAMPBELL, YVONNE

TYPE IN "SUBJECT": NOV 17 RECIEPTS FOR NORFOLK.

CLICK ON "INSERT" ON THE MENU, "FILE", LOOK IN: "C: SITE RECIEPTS".

HIGHLIGHT THE DAY'S REPORT YOU WANT TO SEND ("S321").

CLICK ON SEND.