

How to export Yahrzeit Notifyee List

July 2005

How to export Yahrzeits notifyee list and import to Microsoft Access

- 1: From the General Family screen, select Management, then Yahrzeit List
If you have purchased this module the option will be available.
Otherwise the item will not appear or may be grayed out.
- 2: Once the Yahrzeit List is opened, select the Yahrzeit List Tab
- 3: Select either Civil DOS Month / Day Range, Hebrew Yahrzeit Date Range or use the option in the lower right corner (Select Civil and Hebrew Date Range) then click on Refresh Yahrzeit list. This will give you a list of all deceased people with the selected date range.

In this example, I will use the Civil DOD Month/Day Range

The screenshot shows the 'Yahrzeit Lists' application window. At the top, there are menu options: File, Options, Help. Below the title bar, there is a sub-header: 'Update Hebrew Year in Global Updates Before Creating Yahrzeit Lists'. The main title is 'Yahrzeit Lists'. There are three tabs: 'Add Yahrzeit', 'Yahrzeit Lists' (selected), and 'Yahrzeit Notifyees'. Below the tabs, there is a 'Sort By' section with radio buttons for 'English Name', 'Civil Date', 'Hebrew Name', 'Member Number', and 'Plaque No'. A status bar on the right says '27 Yahrzeits Found'. The main table has the following data:

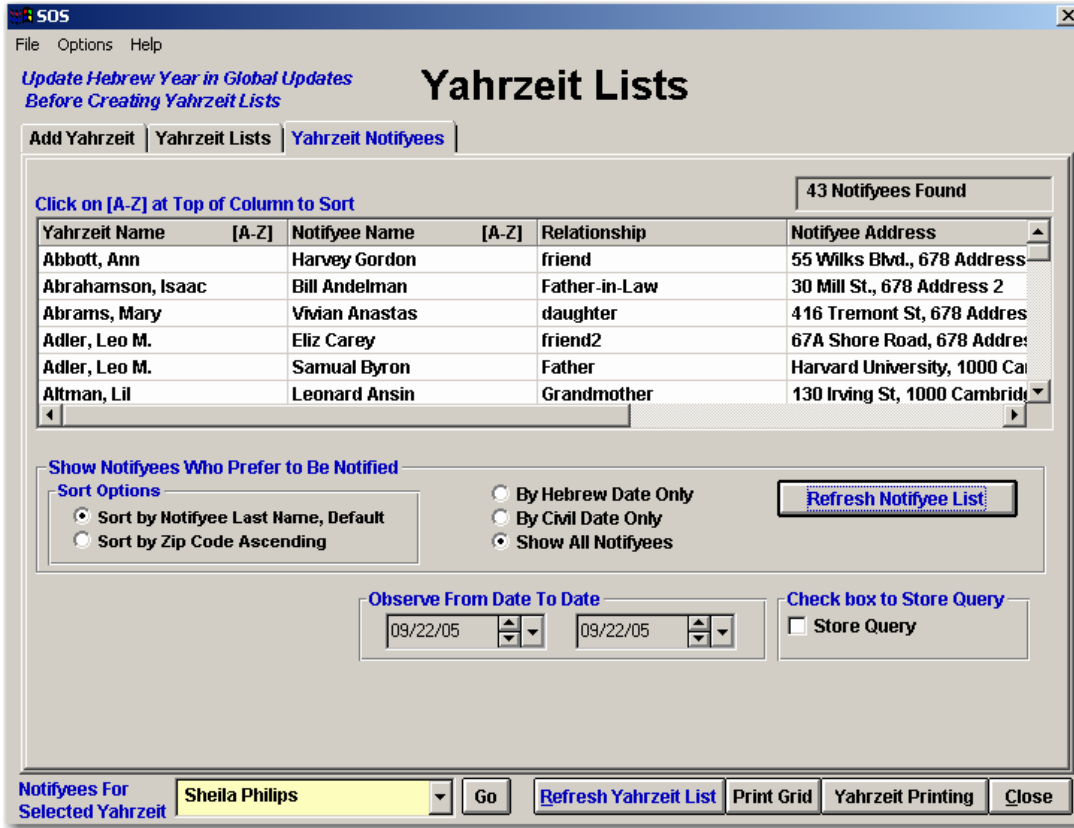
English Name	Hebrew Name	Civil DOD	Primary Member	Primary Member #	Relation
Abbott, Ann		06/05/2004	Baker, Cynthia	BAKER	
Abrahamson, Isaac	Yitzhak ben Avraham	10/05/1889	Andelman, Bill	ANDELMANB	
Abrams, Mary		07/08/2004	Anastas, Vivian	ANASTAS	
Adler, Leo M.		10/09/1988	Byron, Samuel	BYRON	
Altman, Lil		01/16/2002	Glick, Jeffrey	GLICKJEF	

Below the table, there are several sections for display options:

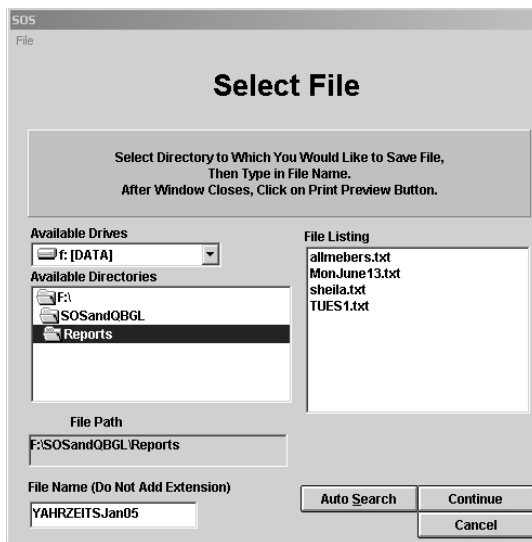
- Display Options for Yahrzeit Lists:**
 - To Be Listed in: B - Synagogue Bulletin, S - Shabbat Service Bulletin, R - Book of Remembrance, With Notification Letters, P - Whose Plaque is to Be Marked
 - Show Complete List *or* Show Yahr. With: Hebrew Date, Civil Date
 - Date Preference of: Civil Date
 - By Gender: All, Male, Female
- Display Options for Yahrzeit and Notifyee Lists:**
 - Select All Yahrzeits (Displayed by Hebrew Date)
 - Select Hebrew Yahrzeit Date Range
 - Select Civil DOD Date Range
 - Select Civil DOD Month/Day Range (highlighted in red)

At the bottom, there is a 'Notifyees For Selected Yahrzeit' dropdown menu showing 'Leonard Ansin', a 'Go' button, a 'Refresh Yahrzeit List' button, and 'Print Grid', 'Yahrzeit Printing', and 'Close' buttons.

4: Select the Yahrzeit Notifyees tab, select the Show Notifyees to be notified, enter the observe from date to date, then select Refresh Notify List.



5: Select Yahrzeit Printing Button. Then under print What, select Nofityees, Select in Export to File Yes, then select a location to save the file and enter a file name without any extension. Then click continue



Please note: the default export folder, is set per user as follows:

- 1: From the General Family Screen, select Administration
- 2: Program Administration
- 3: Click on Accounting Connection
- 4: Enter a the default folder, in the field "Default Export Folder"
(be sure to click update when done)

6: Once you are back at the Yahrzeit printing screen, click on print preview. This will give you a listing of the Notifyees and at the same time export the data to the file and location that you previously selected. (This is a requirement in order to create the file.)

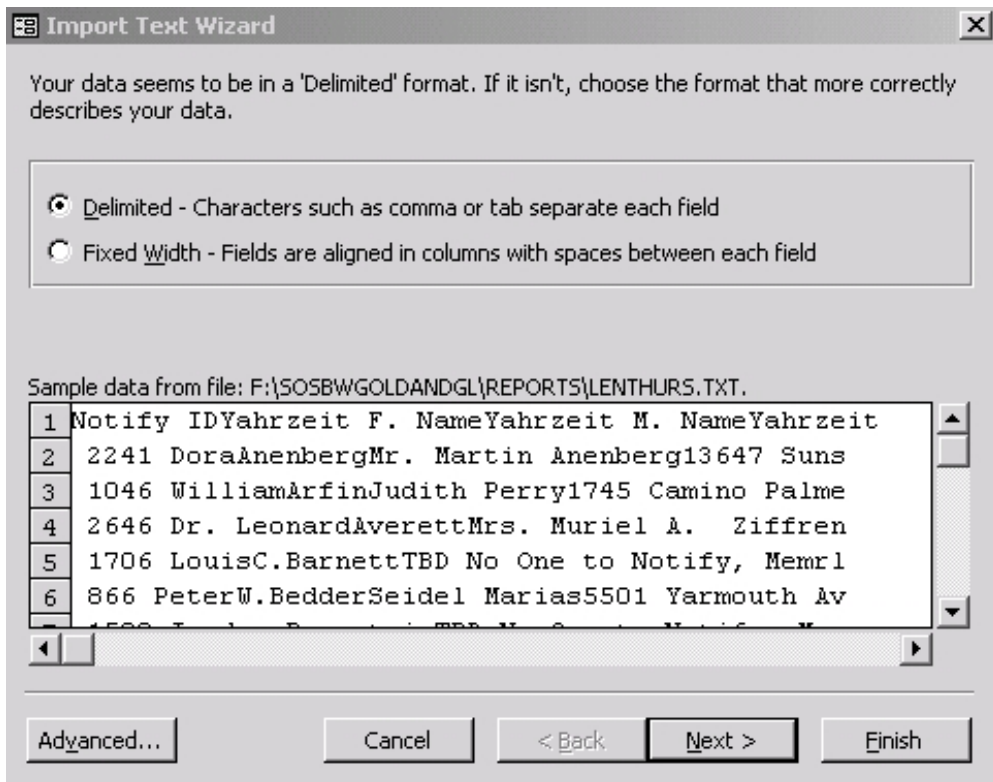
7: Once the print preview is complete, you can then import the file to Excel, Access, Mail Merge with Word or whatever program you choose that accepts a text file.

The following example will show you how import the file to Microsoft Access.

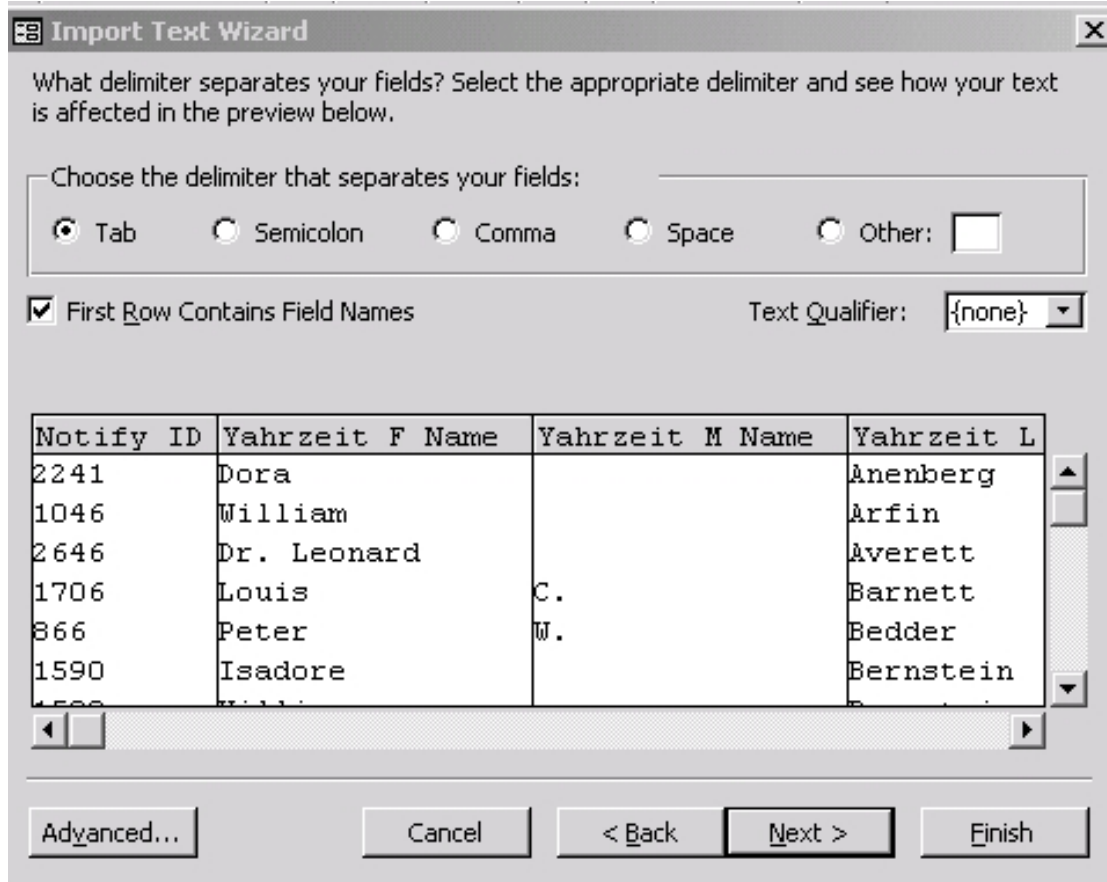
1: First, open Microsoft Access and create a blank database. (Suggestion, you may want to save the new database in the same folder you exported the Yahrzeit List to.

2: Select, in Access, File, get External Data, Import, Change the file type to Text, and point to the folder you saved the exported data to. highlight the file that was previously created by SOS and then select open.

3: At the first screen, leave the option at Delimited



4: select Next, Select the delimiter as TAB, and select 1st row contains field names,



5: Then next and select into a New table or an existing table (it's your choice) then select Next (this screen gives you the option to format the fields. We suggest you just click next, you can always reformat the fields in the design mode of Access. Let access assign the primary key click next and wait a minute while Access imports your data.

Once you have completed the import, the data structure will look like the following:
We have included the field names and where the data comes from.

The field information is imported as follows:

Field Name	SOS Data Comes from
ID	Created by Microsoft Access
Notify ID	Created by SOS
Yahrzeit F Name	Entered in Yahrzeit Screen
Yahrzeit M Name	Entered in Yahrzeit Screen
Yahrzeit L Name	Entered in Yahrzeit Screen
Preferred Salutation	Entered in general Family Screen if A1 and A2 or entered in Family member screen if an individual

Notifyee Name	The selected member name or A1 and A2 or Family
Notifyee First Name	General Family Screen
Notifyee Last Name	General Family Screen
Address	Entered in general Family Screen if A1 and A2 or entered in Family member screen if an individual
City State Zip	Entered in general Family Screen if A1 and A2 or entered in Family member screen if an individual
Zip Code	Members address Screen Family members or general Family
Phone	Members address Screen Family members or General Family
Notify By	As determined by the relationship
Hebrew Yahrzeit Date	Yahrzeit screen (Updated annually through Global Updates)
Date of Death	Yahrzeit screen
Civil Date of Death	Yahrzeit Screen
Hebrew Date of Death	Yahrzeit Screen
Relationship	Relationship Screen
Civil DOD Anniv	Yahrzeit Screen (updated annually through Global updates)
Mailing Label	Combo Mailing Label General family Screen
Notifyee Last Name	The Family name
Svc Date from	As entered on the Yahrzeit Notify Screen, such as Friday, January 14, 2005
Svc Date To	As entered on the Yahrzeit Notify Screen, such as Saturday, January 15, 2005

Whatever fields you do not need, you can use the delete option inside the program that you imported the file to. There may be other fields to be exported.

Hebrew date of death is included with you select, Yahrzeit Lists, Select Hebrew Yahrzeit Date Range.

The process to import the SOS text file to Microsoft Excel is similar to Import to Access, except you do not need to first create a file. The text file is imported directly into Microsoft Excel.

Now you are ready to use the data in a number of different programs that accept a text file, a Microsoft Access file or a Microsoft Excel file.

The export list can also be merged with Microsoft Word.

SOS continues to be enhanced through user comments and ideas. Please email your suggestions to SoSSupport@ansintech.com or SoSrequest@ansintech.com

For more details about SOS visit our web site at
www.ansintech.com

SOS How to export Yahrzeits notifyee list last reviewed July 2005
Technical support toll free number is 1-866-322-4530

Ansin Technology Group Inc. © 1998-2005 All rights reserved
Proprietary and Confidential information