Foundation IP File Comparison Procedure

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2. Document Conventions

- 2.1. Menu and Dialog Box names are in bold.
- 2.2. Variables are in *italics*.
- 2.3. Mouse clicks and selections are in boxes.
- 2.4. <u>NOTES</u> are <u>underlined</u>.

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3. Procedural Notes

3.1. The procedure described below is used to create a file (or files) that can be used for comparison purposes. While the specific data fields listed in this document are

sufficient for that purpose, other/additional data fields may be required for other investigative tasks.

- 3.2. The expected elapsed time to complete each procedure outlined in this document is between 20 and 30 minutes (including time to export the data to Excel).
- 3.3. Ensure Excel files to be downloaded are closed before beginning the data import to Access.
- 3.4. The parameters selected during the procedures outlined in this document reflect specific comparisons and do not include all possible permutations. Several additional queries and comparisons are possible using Access but are not normally performed as part of the comparison / investigation process.

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4. Creating Tables in MS Access

- 4.1. Open MS Access.
- 4.2. Double click the Blank Database icon in the MS **Access** application workspace. See figure 4.1.

Figure 4.1. Blank Database icon in Access.



4.3. Close the **default blank table** by clicking the **table close icon** (**X**) in the upper right corner of the default table. See figure 4.2 (below).

NOTE: **Do not** close the program using the similar close icon in the far upper right corner of the Access display. If Access is closed in this manner work may not be saved. See figure 4.2.

Search Pro

Figure 4.2. Table close icon (green) and Access close icon (red).

NOTE: Ensure Excel files to be imported are closed before beginning the data import to Access.

- 4.4. Click External Data in the menu bar at the top of the screen. See figure 4.3 (below).
- 4.5. Click New Data Source in the External Data menu. See figure 4.3 (below).
- 4.6. Hover over From File in the **New Data Source** dropdown menu. See figure 4.3 (below).
- 4.7. Hover over and select Excel in the **From File** dropdown menu. See figure 4.3.

Figure 4.3. External Data/New Data Source/From File/Excel menu selections.

B	5-0-	.		Data
File	Home	Create	External Data Database Tools Q Tell me what you want to do	
New Da Source	Saved Ir	mports Table Manag	ger Saved Excel Text XML PDF Email Exports File File or XPS More -	
	From <u>F</u> ile	Þ	Export	
	From <u>D</u> ataba	se ▸	HTMLD Import Excel spreadsheet Import data from or link to data in a	
	From <u>O</u> nline	Services 🕨	Microsoft Excel file.	
Þ	From O <u>t</u> her S	Sources 🔸		

NOTE: Usually the file(s) to be imported will be formatted for Excel but they could be text file(s) or formatted other ways as necessary.

- 4.8. After Excel is selected from the **New Data Source** menu the **Get External Data -Excel Spreadsheet** dialog box opens. See figure 4.4 (below).
- 4.9. Click the Browse button near the top of the **Get External Data Excel Spreadsheet** dialog box. See figure 4.4.

Figure 4.4. Browse button in the Get External Data – Excel Spreadsheet dialog box.

Get External Data - Excel Spreadsheet	? X						
Select the source and destination of the data							
Specify the source of the definition of the objects.							
<u>File name:</u> C:\Users\bwalton\Documents\	;e						
Specify how and where you want to store the data in the current database.							
Import the source data into a new table in the current database. If the specified table does not exist, Access will create it. If the specified table already exists, Access might overwrite its contents with the imported data. Changes made to the source data will not be reflected in the database.							
Link to the data source by creating a linked table.							
Access will create a table that will maintain a link to the source data in Excel. Changes made to the source data in Ex be reflected in the linked table. However, the source data cannot be changed from within Access.	cel will						
ОК Са	ncel						

4.10. After Browse is clicked in the Get External Data – Excel Spreadsheet the Windows

File Open dialog box is displayed. See figure 4.5.

Figure 4.5. Windows File Open dialog box.

File Open						
\leftrightarrow \rightarrow \land \uparrow 🗄 \rightarrow This	PC > Documents >			ٽ ~	Search Documents	۶
Organize 🔻 New folder					•== •	
^	Name	Date modified	Туре	Size		
🖈 Quick access	Admin	5/24/2019 2:56 PM	File folder			
📃 Desktop 🛛 🖈	cache	5/22/2019 11:44 AM	File folder			
🕂 Downloads 🖈	Custom Office Templates	5/22/2019 11:44 AM	File folder			
🖆 Documents 🖈		5/22/2019 11:45 AM	File folder			
Pictures 🕜	Equipment	5/22/2010 11:43 AM	File folder			
This PC	Fiddler2	5/22/2019 11:44 AM	File folder			
		5/22/2019 11:43 AM	File folder			
J Music	IBM	5/21/2019 8·38 AM	File folder			
Procedures	Innrotech	5/22/2019 0.50 AM	File folder			
Release Notes		5/22/2010 11:45 AM	File folder			
- Wallpapers	Memotech	5/22/2019 11:45 AM	File folder			
The st	Newfolder	5/22/2019 11:44 AM	File folder			
AB Microsoft Access		5/22/2019 11:45 AM	File folder			
🐔 OneDrive - CPA G	Patent Law	5/22/2019 11:44 AIVI	File folder			
-	Procedures	5/22/2019 11:45 AIVI	File folder			
This PC		5/32/2019 12:10 PIVI	File folder			
File nan	ner	572272019 11244 AM	File tomer	U	Microsoft Excel	
rile nan				~	WICTOSOTT EXCEL	

- 4.11. Navigate to the *location in which the report files to be imported are stored*. See figure4.6 (below).
- 4.12. Select the *file to be imported*. See figure 4.6 (below).
- 4.13. Click Open to import the report file to Access. See figure 4.6.

Figure 4.6. File selected and Open in the Windows File Open dialog box.

😝 File Open						×
\leftrightarrow \rightarrow \checkmark \uparrow \square \rightarrow Thi	is PC > Documents > Procedures			~ Ō	Search Procedures	Q
Organize 🔻 New folde	er					?
A	Name	Date modified	Туре	Size		
Quick access	Matches	6/3/2019 4:39 PM	Microsoft Excel W	91	KB	
Desktop 🖈	RTI-Surgical_CPA_20190508	5/8/2019 3:20 PM	Microsoft Excel W	87	КВ	
🕂 Downloads 🖈	RTISurgical-FIP_20190508	5/8/2019 2:55 PM	Microsoft Excel W	79	КВ	
🖆 Documents 🖈	🕼 Unmatched to CPA	6/4/2019 9:18 AM	Microsoft Excel W	20	KB	
📰 Pictures 🛛 🖈						
💻 This PC 🛛 🖈						
BMS						
Comparions						
Comparisons 2						
Procedures						
A Microsoft Access						
🚳 OneDrive - CPA G						
This PC						
File na	ame: RTI-Surgical_CPA_20190508			~	Microsoft Excel	\sim
	·			Tools 🔻	Open Canc	el:

4.14. After Open is clicked in the Windows File Open dialog box the Get External Data -

Excel Spreadsheet dialog box is displayed. See figure 4.7 (below).

NOTE: **Do not** change the settings under the **Search for "import**" section of the dialog box when selecting the second file to be imported. The default setting of *Import the source data into* <u>a new table in the current database is the correct setting</u>. See figure .7 (below).

4.15. Click OK in the lower right corner of the Get External Data - Excel Spreadsheet

dialog box. See figure 4.7.

Figure 4.7. The Get External Data – Excel Spreadsheet dialog box with File Name, Import Settings, and OK button highlighted.

Get External Data - Excel Spreadsheet	?	×					
Select the source and destination of the data							
Specify the source of the definition of the objects.							
Eile name: C:\Users\bwalton\Documents\Procedures\RTI-Surgical_CPA_20190508.xlsx	B <u>r</u> owse						
Specify how and where you want to store the data in the current database. We will not import table relationships, calculated columns, validation rules, default values, and columns of certain legacy data types such as OLE Object. Search for "Import" in Access 2016 Help for more information.							
 Import the source data into a new table in the current database. If the specified table does not exist, Access will create it. If the specified table already exists, Access might overwrite its contents with the imported data. Changes made to the source data will not be reflected in the database. Link to the data source by creating a linked table. Access will create a table that will maintain a link to the source data in Excel. Changes made to the source data in Excel will be reflected in the linked table. However, the source data cannot be changed from within Access. 							
ОК	Cancel						

- 4.16. After OK is clicked in the **Get External Data Excel Spreadsheet** dialog box the first (worksheet/range) **Import Spreadsheet Wizard** dialog box is displayed. See figure 4.8 (below).
- 4.17. In the first **Import Spreadsheet Wizard** dialog box the radio button next to *Show Worksheets* is selected by default. See figure 4.8 (below).
- 4.18. Click Next in the lower right corner of the first (worksheet/range) Import Spreadsheet Wizard dialog box. See figure 4.8.

Figure 4.8. The first dialog box of the Import Spreadsheet Wizard with Show Worksheets and Next highlighted.

🖃 Import Spreadsheet Wizard X								
Your spreadsheet file contains more than one worksheet or range. Which worksheet or range would you like?								
Show Worksheets Data Map Show Named Ranges Data Map								
Sample data for worksheet	'Data Map'.							
1 MATTER FIP ID	FILE NUMBER	COUNTRY	MATTER TYPE DESCRIPTION	N STATUS	EXPIRATION DATE	A	^	
2 385594	100.001AU1	AU	Utility - NSPCT	Abandoned	Aug 3, 2024	2		
3 385595	100.001EP1	EP	Utility - NSPCT	Abandoned	Aug 3, 2024	0		
4 385596	100.001US1	US	Utility - ORG	Abandoned	Aug 6, 2023	1		
5 385597	100.001US2	US	Utility - DIV	Issued	Aug 6, 2023	1		
6 385598	100.001US3	US	Utility - CON	Issued	Aug 6, 2023	1		
7 385599	100.002US1	US	Utility - REIS	Expired	Jan 16, 2018	1		
8 385600	100.002US2	US	Utility - REIS	Expired	Jan 16, 2018	1		
9 385601	100.002053	US	Utility - REIS	Expired	Jan 16, 2018	1		
10385602	100.002US4	US	Utility - REIS	Expired	Jan 16, 2018	1		
11385603	100.002US5	US	Utility - REIS	Expired	Jan 16, 2018	1		
12385604	100.003DE1	DE	Utility - EPPAT	Issued	Aug 8, 2026	0		
13385605	100.003GB1	GB	Utility - EPPAT	Issued	Aug 8, 2026	0		
14385606	100.003IT1	IT	Utility - EPPAT	Issued	Aug 8, 2026	0	¥	
<			•		•	>		
				_				
			Cancel < Ba	ck <u>N</u> e	xt > <u>F</u> inish			

- 4.19. After <u>Next</u> is clicked in the first (worksheet/range) **Import Spreadsheet Wizard** dialog box the second (column headings) **Import Spreadsheet Wizard** dialog box is displayed. See figure 4.9 (below).
- 4.20. In the second Import Spreadsheet Wizard dialog box the check box next to First Row Contains Column Headings is checked by default. If it is not checked, click the checkbox next to First Row Contains Column Headings to select it. See figure 4.9 (below).
- 4.21. Click Next in the lower right corner of the second (column headings) ImportSpreadsheet Wizard dialog box. See figure 4.9.

Figure 4.9. First Row Contains Column Headings checkbox and Next highlighted in the second Import Spreadsheet Wizard dialog box.

🗐 Import Spreadsheet W	izard				×			
Microsoft Access can use your column headings as field names for your table. Does the first row specified contain column headings?								
Country name	Type name	Patent / Design number	Current renewal date	Cu:				
1 U.S.A.	Large Entity Patent	8241330	14-Feb-16	1	~			
2 European Union	Design	000586094-0001	6-Sep-16	11				
3 European Union	Design	000586102-0001	6-Sep-16	11				
4 European Union	Design	000586102-0002	6-Sep-16	11				
5 European Union	Design	000586102-0003	6-Sep-16	11				
6 European Union	Design	000586102-0004	6-Sep-16	11				
7 European Union	Design	000586102-0005	6-Sep-16	11				
8 European Union	Design	000586102-0006	6-Sep-16	11				
9 European Union	Design	000586102-0007	6-Sep-16	11				
10 European Union	Design	000586102-0008	6-Sep-16	11				
11European Union	Design	000586102-0009	6-Sep-16	11				
12European Union	Design	000586102-0010	6-Sep-16	11				
13Germany	European Patent	3044587	9-Sep-19	6				
14 Spain	European Patent	14842237.1	9-Sep-19	6	v			
<			1	>				
		Cancel < Back	<u>N</u> ext > <u>F</u> inish]			

- 4.22. After Next is clicked in the second (column headings) Import Spreadsheet Wizard dialog box the third (field options) Import Spreadsheet Wizard dialog box is displayed. See figure 4.10.
- Figure 4.10. Field Options in the third Import Spreadsheet Wizard dialog box.

Eield Options		upuons area.			
Field Name		Data Turas			
Field Name:	Country	name Data Lype:	Short Text		
Indexed:	No	Do not imp	ort field (<u>S</u> kip)		
Country	name	Type name	Patent / Design number	Current renewal dat	e Cu
U.S.A.	incinic.	Large Entity Patent	8241330	14-Feb-16	1
European	Union	Design	000586094-0001	6-Sep-16	11
European	Union	Design	000586102-0001	6-Sep-16	11
European	Union	Design	000586102-0002	6-Sep-16	11
European	Union	Design	000586102-0003	6-Sep-16	11
European	Union	Design	000586102-0004	6-Sep-16	11
European	Union	Design	000586102-0005	6-Sep-16	11
European	Union	Design	000586102-0006	6-Sep-16	11
European	Union	Design	000586102-0007	6-Sep-16	11
European	Union	Design	000586102-0008	6-Sep-16	11
European	Union	Design	000586102-0009	6-Sep-16	11
European	Union	Design	000586102-0010	6-Sep-16	11
Germany		European Patent	3044587	9-Sep-19	6
Spain		European Patent	14842237.1	9-Sep-19	6

NOTE: Field Name, Indexed, and do not import field (Skip) do not normally require changes from their default settings.

4.23. Click the title at the top of each displayed data column to view its data type to verify the Data Type in each data column is in **Short Text** (or) **Date with Time** format. For any data column indicating the Data Type is in **Double** format, select the column and change the data type to **Short Text** where necessary by clicking the <u>down caret</u> next to the **Data Type** selection box and selecting <u>Short Text</u> from the **Data Type** dropdown menu. See figure 4.11 (below).

NOTE: Usually only one or two of the displayed columns require these data type changes.

4.24. When data type verification is complete click Next in the lower right corner of the third (field options) Import Spreadsheet Wizard dialog box. See figure 4.11.

Figure 4.11. Data Type data selection of (Double to be corrected with Short Text) box and Next in the Field Options section of the third Import Spreadsheet Wizard dialog box.

-8	Import Spread	lsheet Wizard									×
	You can specify information in t	y information ab he 'Field Options	out each of the f s' area.	ields you	are importing. Sel	ect fields in the	area below. \	'ou can tł	nen modify field		
	-Field Options										
	Field Name:	Current annuit	у	Data <u>Ty</u>	pe: Double		_				
	Indexed:	No	\sim	🗌 Do n	ot imp Byte						
					Integer						
					Long Intege Currency	er					
	Current a	annuity Prop	prietor		Single		eferenc	e		CPA	
1		LANX	K INC		Double	limo	CESS I	MPLANT	S AND ASSOC	I Othe	~
2	1	RTI	SURGICAL,	INC.	Short Text					Aban	
3	1	RTI	SURGICAL,	INC.	Long Text					Aban	
4	1	RTI	SURGICAL,	INC.	Hyperlink					Aban	
5	1	RTI	SURGICAL,	INC.						Aban	
6	1	RTI	SURGICAL,	INC.						Aban	
7	1	RTI	SURGICAL,	INC.						Aban	
8	1	RTI	SURGICAL,	INC.						Aban	
9	1	RTI	SURGICAL,	INC.						Aban	
10	1	RTI	SURGICAL,	INC.						Aban	
11	1	RTI	SURGICAL,	INC.						Aban	
12	1	RTI	SURGICAL,	INC.						Aban	
13		CHU	SAINTE-JUS	STINE	(HOSPITAL)	METHOD OF	TREATIN	G AND	PROGNOSING	S Awai	
14		CHU	SAINTE-JUS	STINE	(HOSPITAL)	METHOD OF	TREATIN	G AND	PROGNOSING	S Awai	¥
<										>	-
					-						
					Cance	21	< <u>B</u> ack	<u>N</u> e	xt >	Finish	

- 4.25. After Next is clicked in the third (field options) Import Spreadsheet Wizard dialog box the fourth (primary ley) Import Spreadsheet Wizard dialog box is displayed. See figure 4.12 (below).
- 4.26. In fourth Import Spreadsheet Wizard dialog box the radio button next to Let Access add primary key is usually selected by default. If it is not selected, click the radio button next to Let Access add primary key to select it. See figure 4.12 (below).
- 4.27. Click Next in the lower right corner of the fourth (primary key) Import SpreadsheetWizard dialog box. See figure 4.12.

Figure 4.12. Let Access Add Primary Key selection and Next in the fourth Import Spreadsheet Wizard dialog box.

🔳 Import Spreadsheet Wizard				Х			
Microsoft Access recommends that you define a primary key for your new table. A primary key is used to uniquely identify each record in your table. It allows you to retrieve data more quickly.							
ID Country name	Type name	Patent / Design number	Current renewal da:				
1 L U.S.A.	Large Entity Patent	8241330	14-Feb-16	~			
2 2 European Union	Design	000586094-0001	6-Sep-16				
3 S European Union	Design	000586102-0001	6-Sep-16	_			
4 4 European Union	Design	000586102-0002	6-Sep-16				
5 5 European Union	Design	000586102-0003	6-Sep-16				
6 6 European Union	Design	000586102-0004	6-Sep-16				
7 7 European Union	Design	000586102-0005	6-Sep-16				
8 8 European Union	Design	000586102-0006	6-Sep-16				
9 9 European Union	Design	000586102-0007	6-Sep-16				
1010 European Union	Design	000586102-0008	6-Sep-16				
1111 European Union	Design	000586102-0009	6-Sep-16				
1212 European Union	Design	000586102-0010	6-Sep-16				
1313 Germany	European Patent	3044587	9-Sep-19				
1414 Spain	European Patent	14842237.1	9-Sep-19	~			
<			>				
	Car	icel < <u>B</u> ack N	ext > <u>F</u> inish				

- 4.28. After Next is clicked in the fourth (primary key) Import Spreadsheet Wizard dialog box the fifth (save and finish) Import Spreadsheet Wizard dialog box is displayed. See figure 4.13 (below).
- 4.29. Enter a *file name* in the **Import to Table** data entry field under **Import to Table**. See figure 4.13 (below).

NOTE: The name of the file from which the data was pulled can be used as the file name.

NOTE: **Do not** click the check box next to **I would like a wizard to analyze my data after importing the data**. See figure 4.13 (below).

4.30. After the file name is entered click Finish in the lower right corner of the fifth (save

and finish) Import Spreadsheet Wizard dialog box. See figure 4.13.

Figure 4.13. The File name data entry field, the I would like a wizard to analyze my table after importing the data checkbox, and Next highlighted in the fifth Import Spreadsheet Wizard dialog box.

🗐 Import Spreadsheet Wizard	×
That's all the information the wizard needs to import your data. Import to Table: CPA_RTI Surgical	
Cancel < Back Mext >	

4.31. After Finish is clicked in the fifth (save and finish) Import Spreadsheet Wizard dialog box the Import Spreadsheet Wizard is closed and the Get External Data – Excel Spreadsheet dialog box is displayed. See figure 4.14 (below).

NOTE: **Do not** click **Save Import Steps** in this screen of the **Get External Data – Excel Spreadsheet** dialog box. See figure .14 (below).

4.32. Click Close in the lower right corner of the **Get External Data – Excel Spreadsheet**. See figure 4.14.

Figure 4.14. The Save import steps and Close button highlighted in the Get External Data – Excel Spreadsheet dialog box.

Get External Data - Excel Spreadsheet	?	×
Save Import Steps		
Finished importing file 'C:\Users\bwalton\Documents\Procedures\RTI-Surgical_CPA_20190508.xlsx' to table 'CPA_RTI Sur	gical'.	
Do you want to save these import steps? This will allow you to quickly repeat the operation without using the wizard.		
	<u>C</u> lose	

4.33. After Close is clicked in the **Get External Data – Excel Spreadsheet** dialog box the first imported table is now listed under **All Access Objects** on the left side of the screen. See figure 4.15.

Figure 4.15. The first imported table under All Access Objects.

🗄 5-0- -						
File Home Create Ex	ternal Data	Database Tools	Q Tell me what you want to do			
New Data Source •	Saved Exce Exports	el Text XML File File	PDF Email or XPS	e		
lange and Or Lindly		Ex	port			
All Access Obje 🖻 «						
Search 🔎						
Tables \$ Image: Straight of the stra						

4.34. Repeat steps **4.4** through **4.33** to import the *other data file* to Access.

IMPORTANT: The exact sequence of steps may change when adding a second (or subsequent) tables. Follow the procedures outlined in steps X through Y for each dialog box that appears in the Get External Data – Excel Spreadsheet Wizard.

NOTE: **Do not** change the settings under the **Search for "import**" section of the dialog box when selecting the second file to be imported. The default setting of *Import the source data into* <u>a new table in the current database is the correct setting</u>. See figure 4.16.

Figure 4.16. Import options in the Get External Data – Excel Spreadsheet dialog box.

Get External Data - Excel Spreadsheet	?	×
Select the source and destination of the data		
Specify the source of the definition of the objects.		
<u>F</u> ile name: C:\Users\bwalton\Documents\Procedures\	B <u>r</u> owse	
Specify how and where you want to store the data in the current database. We will not import table relationships, calculated columns, validation rules, default values, and columns of certain le such as OLE Object. Search for "Import" in Access 2016 Help for more information. Import the source data into a new table in the current database. If the specified table does not exist, Access will create it. If the specified table already exists, Access might or contents with the imported data. Changes made to the source data will not be reflected in the database.	egacy data type verwrite its	<u>'</u> 5
<u>Append a copy of the records to the table:</u> RTI Surgical_CPA_20190508		
If the specified table exists, Access will add the records to the table. If the table does not exist, Access will co Changes made to the source data will not be reflected in the database.	reate it.	
\bigcirc Link to the data source by creating a linked table.		
Access will create a table that will maintain a link to the source data in Excel. Changes made to the source d be reflected in the linked table. However, the source data cannot be changed from within Access.	lata in Excel wi	'
OK	Cancel	

- 4.35. When importation of the second (or subsequent) table(s) is complete the imported data tables are listed under **Tables** in **All Access Objects** on the left side of the screen. See figure 3.17.
- Figure 4.17. Tables listed under All Access Objects.



NOTE: If an error is made during the external data import process a **Data Map ImportErrors** file will appear in the Tables list under **All Access Objects** on the left side of the workspace. This usually occurs when the data type imported to the table was not changed from *Double* to *Short Text* where required. To repair the problem the data import that generated the **Data Map ImportErrors** file (usually the most recent import) will need to be performed again. See figure 4.18.

Figure 4.18. Import Errors file under All Access Objects.



4.36. After correctly importing the data the **Data Map ImportErrors** file and the **Table file in which the error(s) occurred** (in this example FIP RTI Surgical) must be deleted from the **All Access Objects** list by right clicking on <u>the file(s)</u> and selecting <u>Delete</u> from the **Table** dropdown menus. See figure 4.19 (below).

NOTE: Any Table or Query can be deleted from the **All Access Objects** list using the same deletion procedure. See figure 4.19.

Figure 4.19. Deletion of the Import Errors file.

🗄 5• 0• =			Matches : Database-	C:\Users\bwalton\Documents\Matches.accdb (Ac
File Home Create	External Data Data	base Tools	Q Tell me what you want	t to do
New Data Source *	Saved Excel Te Exports Fi	xt XML PI le File or 2	DF Email (PS More $ au$	rge
Import & Link		Export		
All Access Obje 🖻 🔇	<			
Search				
CPA RTI Surgical				
'Data Map\$'_ImportErrors				
FIP RTI Surgical	Open			
	Design View			
	I <u>m</u> port	•		
	Export	•		
	Rename			
	<u>H</u> ide in this Grou	p		
	X Cut			
	Conv			
	Paste			
	Linked Table Mar	nager		
	Convert to Local	Table		
	Table Properties			

4.37. Right click on *one of the two tables* (in this example CPA) listed in the All Access
Objects list on the left side of the screen and select Design View from the Table dropdown menu. See figure 4.20.

Figure 4.20. Design View in the Table dropdown file menu.



- 4.38. After clicking Design View in the **Table** dropdown menu the **Design View** dialog box is displayed. See figure 4.21 (below).
- 4.39. In the Field Name column insert the name of the table being designed in front of the first data field name displayed in the Design View dialog box. Example- previous ID, new CPA-ID. See figure 4.21.
- Figure 4.21. CPA prefix inserted in front of the default field name on the first line in Design View.

⊟ 5• ∂× ∓		Table Tools	Database3 : Database-
File Home Create Ex	ternal Data Database Tools	Design Q Tell me what you	want to do
View Views Views Views Views	See Insert Rows ★ Delete Rows Property Sheet Show CPA RTI Surgical	y Indexes Create Data Rename/ Macros × Delete Macro v/Hide Field, Record & Table Event	Relationships Object Dependencies Relationships
All Access Obje (*) « Search	Field Name CPA-D	Data Type AutoNumber	
CPA_RTI Surgical	Country name Type name	Short Text Short Text	
EIP_RTI Surgical	Patent / Design number	Short Text	
	Current renewal date	Date/Time	
	Current annuity	Short Text	
	Proprietor	Short Text	
	Client's reference	Short Text	
	CPA case status	Short Text	
	Client account number	Short Text	
	Client's case code	Short Text	
	File number	Short Text	
	Application number	Short Text	
	Expiry date	Date/Time	

4.40. Add the *name of the table being designed* in front of the remaining data field names displayed in the **Design View** dialog box. See figure 4.22 (below).

NOTE: click CRTL+C to copy the added characters and CTRL+V to paste them into the remaining fields. See figure 4.22.

Figure 4.22. CPA prefix inserted in front of the default field name on all lines in Design View.

H	• • • •	÷						Table	Tool	s		Da	tabase3 : Database-
File	Home	Create	Ext	ternal	l Data	Database	Tools	Des	ign	🖓 Tell r	ne what you w	ant to do	
View Views	Primary Buil Key	der Test Val Ru	idatio les Tools	n N	= Inser Celet	t Rows e Rows ify Lookups	Property Sheet Show,	Inde /Hide	(es	Create Data Macros + Field, Record	Rename/ Delete Macro & Table Events	Relationships Relationships	Object Dependencies onships
All A	Access O	bje 🖻) «	-	CPA_	RTI Surgical Field Na	me			Data Ty	/pe		
Search				8	CPA-	D			Aut	oNumber			
			~		CPA-	ountry nam	e		Sho	rt Text			
	CPA_RTI Surgica	1			CPA-	ype name			Sho	rt Text			
=== F	FIP_RTI Surgical				CPA-	atent / Des	ign numl	ber	Sho	rt Text			
					CPA-	urrent rene	wal date	2	Dat	e/Time			
					CPA-	Current annu	iity		Sho	rt Text			
					CPA-	roprietor			Sho	rt Text			
				0	CPA-	lient's refe	rence		Sho	rt Text			
				0	CPA-	PA case sta	tus		Sho	rt Text			
				0	CPA-	lient accour	nt numb	er	Sho	rt Text			
				0	CPA-	lient's case	code		Sho	rt Text			
				0	CPA-	ile number			Sho	rt Text			
				0	CPA-	pplication r	number		Sho	rt Text			
				0	CPA-	xpiry date			Dat	e/Time			



4.41. When the field name edits are complete click File in the Access menu bar at the top

of the page. See figure 4.23.

Figure 4.23. File in the Access menu Bar.

H	5 •∂-;	Ŧ					Table	Tools	Matches	: Database- C:
File	Home	Create	Ext	ternal Data	Database	e Tools	Des	ign	🛛 Tell	me what you w
View Views	Primary Build Key	der Test Valid Rule To	latio s	≩= Insert f ک Delete ת Modify	Rows Rows 7 Lookups	Property Sheet Show	/Index //Hide	es C	Create Data Macros * eld, Record	Rename/ Delete Macro & Table Events
All A	ccess Ol	bje 🖻	~	CPA RT	1 Surgical					
Search		-	۵	0	Field Na	ame			Data T	ype
Tables	-			V CPA-ID				Auto	Number	
Tables	•	2	\$	CPA-Co	untry nan	ne		Short	t Text	
ш с	PA RTI Surgical			CPA-Ty	pe name			Short	t Text	
E F	P RTI Surgical			CPA-Pa	tent / Des	ign num	ber	Short	t Text	
				CPA-Cu	rrent rene	ewal date	e	Date	/Time	
				CPA-Cu	CPA-Current annuity			Short Text		
				CPA-Pr	CPA-Proprietor			Short Text		
				CDA Cli	iont's rofo	ronco		Short	t Toyt	

- 4.42. After File is clicked the Info screen is displayed. See figure 4.24 (below).
- 4.43. Click Save in the Info screen. See figure 4.24.

Figure 4.24. The Info screen with Save highlighted.



4.44. Click on the other table listed under **Tables** in the **All Access Objects** list on the left side of the screen. See figure 4.25 (below).

4.45. Repeat steps **4.37** through **4.43** to process the second (and any subsequent) table(s). See figures 4.26 and 4.27.

Figure 4.26. FIP_RTI Surgical table about to be designed.

8 S	- ¢		;					Ta	ble Tools	Matches	: Database	- C:\Users\bwa
File	Home		Create E	xternal	Data	Databa	ase Tools	Field	s Table	Q Tell	me what yo	ou want to do
View P	aste	K C C C F C	ut opy ormat Painter	Filte	r 2↓ Z↓ A↓	Ascending Descendir Remove S	ng T Sele ng D Adv ort T Tog	ection * anced * gle Filte	Refresh	🖆 New 🛃 Save 🗙 Delete	∑ Tota V Spell V III More	ing Find
Views	CI	ipbo	ard 5			Sort &	Filter			Record	ls	
All Aco	cess	O	oje 🖻 «		FIP RT	1 Surgical						
Search			م ر		10) -	MATTER F	IP 🗕 F	FILE NUMBE	i 🚽 Coui	NTRY -	MATTER TYP
Tables			\$			1	385735	а	300.026US1	US		Utility - CIP
		ui en l	~			2	385736	3	300.027AU1	AU		Utility - NSP
CPA I	KII Surg	licai				3	385737	3	300.027BR1	BR		Utility - NSPO
E FIP R	TI Sur <u>c</u>		Open			4	385738	3	300.027CN1	CN		Utility - NSPO
	- 1	h.#	Design Wass			5	385739	3	300.027EP1	EP		Utility - NSPO
		<u></u>	Design View			6	385740	3	300.027US1	US		Utility - CIP
			l <u>m</u> port		►	7	385741	3	300.027US2	US		Utility - DIV
			Export		►	8	385742	3	300.028EP1	EP		Utility - NSPO
		Ē	Panama			9	385743	3	300.028US1	US		Utility - CIP
			Nena <u>m</u> e			10	385744	3	300.029US1	US		Utility - NSPG
			<u>H</u> ide in this G	roup		11	385745	3	300.030CN2	CN		Utility - NSPG
			Delete			12	385746	3	300.030GB1	GB		Utility - NSPG

Figure 4.27. FIP_RTI Surgical table with FIP- prefixes added.

⊟ 5° ở ∓		Table Tools
File Home Create Ext	ernal Data Database Tools H	Help <mark>Design</mark> 🔎
View Primary Builder Test Validati Key Rules	Insert Rows ★ Delete Rows Property In Condify Lookups Sheet Show/Hi	dexes Create Data Renan Macros - Delete M Field, Record & Table I
All Access Obje ⊙ «	Eield Name	gical Data Type
Search	FIP- D	AutoNumber
Tables *	FIP- MATTER FIP ID	Short Text
CPA_RTI Surgical	FIP- ILE NUMBER	Short Text
FIP_RTI Surgical	FIP- COUNTRY	Short Text
	FIP- NATTER TYPE DESCRIPTION	Short Text
	FIP- TATUS	Short Text
	FIP- XPIRATION DATE	Date/Time
	FIP-APPLICATION NUMBER	Short Text
	FIP- PATENT NUMBER	Short Text
	FIP- JUMBER OF DESIGNATED S	Short Text
	FIP-ANNUITY PAYMENT PROVI	Short Text
	FIP-CPA GLOBAL	Short Text

4.46. After the table(s) have been created in Access capture the *number of records displayed in the lower left corner <u>of each table</u>. See figure 4.28.*

Figures 4.28. Record totals highlighted.

1	8 385752	300.031025	05					
1	9 385753	300.034US1	US		18	U.S.A.	Large Entity Pa	9113972
2	0 385754	300.035US1	US		19	U.S.A.	Large Entity PC	9089437
2	1 385755	300.036US1	US		20	U.S.A.	Large Entity Pa	9101493
2	2 205756	200.027US1	110		21	U.S.A.	Large Entity Pa	7207994
2	2 363730	500.057051	03		22	U.S.A.	Large Entity Pa	6605091
2	3 385757	300.037US2	US		23	U.S.A.	Large Entity Pa	6860883
2	4 385758	300.040US1	US		24	U.S.A.	Large Entity Pa	7976550
2	5 385759	300.041US1	US		25	U.S.A.	Large Entity Pa	8986351
2	6 385760	300.042US1	US		26	U.S.A.	Large Entity PC	8956285
Record: M 1 of	1032 🕨 🕅 👫 🧃	No Filter Sear	rch	Record: 14	1 of 85	i7 ► ► ► ► ₹	No Filter Search	1

4.47. Export the *data extracted <u>from each table</u>* to separate tabs in an Excel spreadsheet file using the procedure outlined in the <u>Exporting Access Query Data to MS Excel</u> <u>section (Section 10)</u> (below).

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5. Finding Matched Records Using Queries in MS Access

- 5.1. Click Create in the Access menu bar. See figure (below).
- 5.2. Select Query Design from the **Create** menu. See figure 5.1.

Figure 5.1. Create / Query Design in the Create menu bar.



- 5.3. The **Show Table** dialog box is displayed. See figure 5.2 (below).
- 5.4. Click *the first table to be used* (in this example CPA) listed in the **Show Table** dialog box. See figure 5.2 (below).
- 5.5. Click Add at the bottom of the **Show Table** dialog box to add the selected table to the query. See figure 5.2 (below).
- 5.6. After clicking Add in the **Show Table** dialog box the added table now appears in the **Query1** workspace. See figure 5.2 (below).
- 5.7. Click the *the other table to be used* (in this example FIP) listed in the **Show Table** dialog box. See figure 5.2 (below).
- 5.8. Click Add at the bottom of the **Show Table** dialog box to add the table to the **Query1** workspace. See figure 5.2.

Figure 5.2. Second table and Add highlighted in the Show Table dialog box.

g Query1	
CPA_RTI Surgical * CPA-JD CPA-Country name CPA-Parent / Desic CPA-Current renev FIP-FILE NUMBER FIP-COUNTRY FIP-MATTER TYPE D *	Show Table ? X Tables Queries Both CPA_RTI Surgical FIP_RTI Surgical

- 5.9. After clicking Add in the **Show Table** dialog box both tables now appear in the **Query1** design. See figure 5.3 (below).
- 5.10. Click Close in the **Show Table** dialog box. See figure 5.3.

Figure 5.3. Close highlighted in the Show Table dialog box.

xternal Data Database Tools Design	Q Tell me what you want to do
end Update Crosstab Delete Query Type	Image: Show Table I
CPA RTI Surgical	FIP RTI Surgical
* CPA-ID CPA-Country name CPA-Type name CPA-Patent / Desic CPA-Current renev	* • IP-ID FIP-ID FIP-FILE NUMBER FIP-COUNTRY FIP-MATTER TYPE D •
Field: Table: Sort: Show: Criteria:	
or:	Add Close

- 5.11. After clicking Close in the **Show Table** dialog box the **Show Table** dialog box is closed leaving the tables listed in the **Query1** display. See figure 5.4 (below).
- 5.12. Click and drag the borders of each table in the Query1 workspace to resize each of them to enable viewing of all data entries in each table. See figure 5.4.

Figure 5.4. Both tables resized for effective viewing of the fields therein.

_	
Ouerv1	

CPA RTI Surgical	FIP_RTI Surgical
*	*
CPA-ID	FIP-ID
CPA-Country name	FIP-MATTER FIP ID
CPA-Type name	FIP-FILE NUMBER
CPA-Patent / Design number	FIP-COUNTRY
CPA-Current renewal date	FIP-MATTER TYPE DESCRIPTION
CPA-Current annuity	FIP-STATUS
CPA-Proprietor	FIP-EXPIRATION DATE
CPA-Client's reference	FIP-APPLICATION NUMBER
CPA-CPA case status	FIP-PATENT NUMBER
CPA-Client account number	FIP-NUMBER OF DESIGNATED STATES
CPA-Client's case code	FIP-ANNUITY PAYMENT PROVIDER
CPA-File number	FIP-CPA GLOBAL
CPA-Application number	
CPA-Expiry date	
CPA-Expiry date	

5.13. Double click each field entry *in the following order* to add them to the query:

- 5.13.1. CPA-ID
- 5.13.2. FIP-ID
- 5.13.3. CPA-Client's Case Code
- 5.13.4. FIP-Matter FIP ID
- 5.13.5. CPA-CPA Case Status
- 5.13.6. FIP-STATUS
- 5.13.7. CPA-Client account number
- 5.13.8. CPA-File Number
- 5.13.9. FIP-FILE NUMBER
- 5.13.10. CPA-Patent / Design Number
- 5.13.11. FIP-PATENT NUMBER
- 5.13.12. CPA-Application number
- 5.13.13. FIP-APPLICATION NUMBER
- 5.13.14. FIP-ANNUITY PAYMENT PROVIDER
- 5.13.15. FIP-CPA GLOBAL
- 5.13.16. CPA-Country name
- 5.13.17. FIP-COUNTRY

NOTE: As each field is added it appears in the table at the bottom of the Query. See figure 5.5.

Figure 5.5. Tables with selected fields (split screen capture- the table is wider than can be viewed here.)

Field: Table: Sort:	CPA-ID CPA_RTI Surgical	FIP-ID FIP_RTI Surgical	CPA-Client's case cod CPA_RTI Surgical	FIP-MATTER FIP ID FIP_RTI Surgical	CPA-CPA case status CPA_RTI Surgical	FIP-STATUS FIP_RTI Surgical	CPA-Client account n CPA_RTI Surgical	CPA-File number CPA_RTI Surgical	FIP-FILE NUMBER FIP_RTI Surgical
Show: Criteria:									
or:									
	•								

Field: Table:	CPA-Patent / Design r CPA_RTI Surgical	FIP-PATENT NUMBER FIP_RTI Surgical	CPA-Application num CPA_RTI Surgical	FIP-APPLICATION NUN FIP_RTI Surgical	FIP-ANNUITY PAYMEN FIP_RTI Surgical	FIP-CPA GLOBAL FIP_RTI Surgical	CPA-Country name CPA_RTI Surgical	FIP-COUNTRY FIP_RTI Surgical
Sort:								
Criteria:								
or:								
	4							

NOTE: The design of the query will depend on the data needed in the output file. Not all fields are used for every output file.

NOTE: FIP to CPA correlations are FIP ID to CPA Case Code, FIP Patent Number to CPA Patent Design Number, and FIP Matter ID to CPA Client Case Code.

5.14. Left click CPA-Client's Case Code in the CPA column and drag it to FIP-MATTERFIP ID in the FIP column then release the mouse button to link the two data fields.See figure 5.6 (below).

NOTE: If the association between CPA-Client's Case Code and FIP-MATTER FIP ID is not made, when run the query will yield a virtual mountain of unusable spurious data.

Figure 5.6. Client's Case Code linked to FIP-FIP MATTER ID and Run highlighted in the menu bar.



5.15. Click Run from the **Design** tab in the menu bar. See figure 5.6 (above).

NOTE: The **Run** command can be executed multiple times after data is added (or) removed from tables.

5.16. After Run is clicked the Query is run by Access and the resulting data is displayed in

a Query1 tab. See figure 5.7.

Figure 5.7. Query results displayed.

H	5- <i>2-</i> -							Database	3 : Database-	C:\Users\bwalton\Doci	uments\Database3.
File	Home Create	Ext	ernal Data	Database	e Tools ♀ Ţ	ell me what you v	vant to do				
View	Paste V V V V V V V V V V V V V	nter	Filter A Aso A De A Rep	cending scending move Sort	Selection Advanced	er All •	New Example Tota Save Spel Delete Tim Mo r	als ling re ▼ Find	Replace Go To * Select *	Calibri B I <u>U</u> <u>A</u> → a⊻	• <u>11</u> • = <u>1</u> • <u>></u> • = =
Views	Clipboard	5		Sort & Fi	ilter		Records	Fin	d	Te	ext Formatting
All A	ccess Obie 🤇) «	Query1								
Search	ccccc c .sjom	0) 👻	FIP-ID 👻	CPA-Client's -	FIP-MATTER -	CPA-CPA cas 🕶	FIP-STATU	S 👻 CPA-Client a 🕶	CPA-File nur 👻
Tables		~		13	1021	1170736	1170736	Awaiting instru	Issued	2243699	300.188DE1
	DA DTI Surgical	^		14	1023	1170738	1170738	Awaiting instru	Issued	2243699	300.188ES1
	PA_KII Surgical			15	1020	1170735	1170735	Awaiting instru	Issued	2243699	300.188FR1
FI EI	P_RTI Surgical			16	1024	1170739	1170739	Awaiting instru	Issued	2243699	300.188GB1
				17	1022	1170737	1170737	Awaiting instru	Issued	2243699	300.188IT1
				18	557	733353	733353	None	Issued	2243699	300.103US3
				19	108	385701	385701	None	Issued	2243699	200.016US3
				20	26	385685	385685	None	Issued	2243699	200.015US3
				21	651	988627	988627	None	Issued	2243699	300.148US2
				22	655	988637	988637	None	Issued	2243699	300.150US1
				23	650	988625	988625	Awaiting instru	Issued	2243699	300.148US1
				24	647	988606	988606	None	Issued	2243699	300.147US2
				25	637	988550	988550	None	Issued	2243699	300.145US2
				26	636	988549	988549	None	Issued	2243699	300.145US1
				27	635	988542	988542	None	Issued	2243699	300.144US1
				28	633	988490	988490	None	Issued	2243699	300.143US2

- 5.17. Save **Query1** by right clicking the <u>Query1 tab</u> in the leftmost corner of the query data display. See figure 5.8 (below).
- 5.18. After the Query 1 tab is right clicked the **Save** dropdown menu is displayed. See figure 5.8 (below).
- 5.19. Click Save in the **Save** dropdown menu. See figure 5.8.

Figure 5.8. Save in the Save As dialog box.

H	5-0- -								
File	Home Create External Da	ita D	Datak	oase Too	ols F	lelp	, Стеl	l me what y	ou wa
View	Cut Copy Paste ▼ Format Painter	Ascending ▼ Selection ▼ Ascending ▲ Selection ▼ Advanced ▼ Advanced ▼ Advanced ▼				on ▼ eed ▼ Filter	Refresh All • X Delete •		
View	s Clipboard 🕞		Sort	& Filter				Record	s.
All	Access Objects				Save		•	CPA-Clien	t's 🕶
Tabl		~		×	<u>C</u> lose		1021	1170736	
	CPA RTI Surgical	~			<u>C</u> lose A	II	1023	1170738	
				<u>M</u>	Design V	View	1020	1170735	
	FIP_RITSurgical			SOL	SOL Vie	w	1024	1170739	
Que	ries	~			5 <u>5</u> 2 me		1022	1170737	
	Duplicates from CPA Table to Query Matche	s			Datas <u>h</u> e	et View	557	733353	
	Duplicates from CPA Tables				19		108	385701	
	Duplicates from FIP Table to Query Matches				20		26	385685	
	Duplicates from FIP Tables				21		651	988627	
	bupileares from the tables	_			22		655	988637	

- 5.20. After Save is clicked in the Save dropdown menu the Save As dialog box is displayed. See figure 5.9 (below).
- 5.21. In the Save As dialog box enter a *descriptive file name* in the **Query Name** data entry field. See figure 5.9 (below).
- 5.22. After entering the *descriptive file name* in the **Query Name** data entry field click OK in the **Save As** dialog box to save the Query. See figure 5.9.

Figure 5.9. Save Changes dialog box with Yes highlighted.

	Query1									
\mathbb{Z}	CPA-ID	-	FIP-ID 👻	CPA-Client's 🕶	FIP-MATTER -	CPA-CPA cas 👻	FIP-STATUS 👻	CPA-Client a 🗸	CPA-File nur 👻	FIP-F
		13	1021	1170736	1170736	Awaiting instru	Issued	2243699	300.188DE1	300.1
		14	1023	1170738	1170738	Awaiting instru	Issued	2243699	300.188ES1	300.1
		15	1020	1170735	1170735	Awaiting instru	Issued	2243699	300.188FR1	300.1
		16	1024	1170739	1170739	Awaiting instru	Issued	2243699	300.188GB1	300.1
		17	1022	1170737	1170737	Awaiting instru	Issued	2243699	300.188IT1	300.1
		18	557	733353	733353	None	Is Save As		? X	300.1
		19	108	385701	385701	None	Is			200.0
		20	26	385685	385685	None	Is Query Name:			200.0
		21	651	988627	988627	None	Is. Matches			300.1
		22	655	988637	988637	None	ls.	OK	Cancel	300.1
		23	650	988625	988625	Awaiting instru	ls	OK	Cancer	300.1
		24	647	988606	988606	None	Issued	2243699	300.147US2	300.1
		25	637	988550	988550	None	Issued	2243699	300.145US2	300.1
		26	636	988549	988549	None	Issued	2243699	300.145US1	300.1

5.23. After clicking OK in the **Save As** dialog box the newly created query is listed under the **All Access Objects** list on the leftmost side of the page (and) the name displayed in the tab is also changed to the entered file name. See figure 5.10.

Figure 5.10. New query listed in All Access Objects.

Test : Database- C:\Users\bwalte												Users\bwalton\Doc	
File	Home	Create	Ext	ernal [Data Data	abase Tools	Help	ρTe	ell me what you v	vant to do			
View	Paste	Cut Copy Format I	Painter	Filt	Ascend Agi Ascend Agi Descer Agi Remov	ding 🏹 Select nding 🔚 Advar ve Sort 🍸 Togg	tion • nced • e Filter	Refresh All •	New Save	Totals Spelling More •	Find	 ab ceplace → Go To + Go Select + 	Calibri B I U
Views	Clip	board	5		So	rt & Filter			Records			Find	
All A	ccess O	bie	⊙«	🛄 CI	PA_RTI Surgical	FIP_RTI Su	rgical [Duplic	ates from CPA Tab	le 🕞 Duj	plicates	from FIP Table	Matches
Search		~je		4	CPA-ID 🔹 👻	FIP-ID 👻	CPA-C	lient's 🝷	FIP-MATTER -	CPA-CPA	cas 👻	FIP-STATUS	CPA-Client a 🗸
Tables			~		13	102:	117073	6	1170736	Awaiting	instru	Issued	2243699
Tables			~		14	102	3 117073	8	1170738	Awaiting	instru	Issued	2243699
EEE CP	A_RTI Surgical	I			15	102	117073	5	1170735	Awaiting	instrι	Issued	2243699
E FIP	P_RTI Surgical				16	1024	117073	9	1170739	Awaiting	instru	Issued	2243699
Queries	s		*		17	102	2 117073	37	1170737	Awaiting	instru	Issued	2243699
Du Du	plicates from	CPA Table	e		18	55	733353	}	733353	None		Issued	2243699
🗐 Du	plicates from	FIP Table			19	149	385701	L	385701	None		Issued	2243699
- Matchag				20	133	385685	5	385685	None		Issued	2243699	
	accirc.				21	65:	988627	7	988627	None		Issued	2243699
					22	655	988637	7	988637	None		Issued	2243699

5.24. Scroll down and capture the *number of records* displayed in the lower left corner of the **Matches** query data display See figure 5.11.

Figures 5.11. Record totals highlighted.

	Record: 14 1 of 76	59 ▶ ₩→≅ 🕵	No Filter Search	1
	52	425	385963	385963
	51	426	385964	385964
	50	430	385968	385968
	49	431	385969	385969
	48	433	385971	385971
	47	460	385997	385997
1		702	303333	303333

5.25. Compare the number of records in the **Matches** query data display to the total number of records in each table data display. See figure 5.12.

NOTE: The number of matches should not exceed the lower matter number. If it does, that is a clear sign that there are duplicates which would be pointed out//made known when running the duplicate matches query.

Figures 5.12. Record totals highlighted

J4	303131	200.031031	05		34 U.S.A.	Large Entity Pa	9700584
35	385752	300.031US2	US		35 U.S.A.	Large Entity Pa	9700430
36	385753	300.034US1	US		36 U.S.A.	Large Entity Pa	9445916
37	385754	300.035US1	US		37 U.S.A.	Large Entity Pa	9381044
38	385755	300.036US1	US		38 U.S.A.	Large Entity Pa	10022160
39	385756	300.037US1	US		39 U.S.A.	Large Entity Pa	10022472
40	385757	300.037US2	US		40 U.S.A.	Large Entity Pa	9351852
Record: I4 4 1 of 10	32 🕨 🕅 🌬 🦷	No Filter Searc	:h	Record: I4	1 of 857 🕨 🕨 🎉	No Filter Search	1

5.26. Export the data generated by the query to a separate tab in an Excel spreadsheet file using the procedure outlined in the <u>Exporting Access Query Data to MS Excel</u> <u>section (Section 10)</u> (below).

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6. Finding Duplicate Records Using Primary Key CPA ID and Matches Query in MS Access

- 6.1. Click Create in the Access menu bar at the top of the page. See figure 6.1 (below).
- 6.2. Click Query Wizard in the **Create** menu. See figure 6.1.

Figure 6.1. Query Wizard in the Create menu.

		÷									Data
File	Home	Create	e Exte	rnal Data	Database Too	ls Ç	Tell n	ne what you want to	do		
Application Parts •	Table	Table 2 Design	SharePoint Lists +	Query Qu Wizard Pe	uery Form	Form Design	Blank Form	Form Wizard	Report	Keport Design	Blank Report
Templates		Tables	;	Queries	s		Form	15			Repor
All Acc Search	ess O	bje	> *	Query Wizard Show the Query Wizard, which helps you create a Simple query, a							
Tables			*	Crosstab	query, a Find	Duplicat	es				
RTI-Su	irgical_CP	A_201905	508	query, or	r a Find Unmat	ched qu	ery.				
III RTISur	gical-FIP_	2019050	8	·							
Queries			*								
Match	ies										

6.3. After clicking Query Wizard in the **Create** menu the **New Query** dialog box is displayed. See figure 6.2 (below).

NOTE: The **New Query** dialog box defaults to the **Simple Query Wizard** selected. It will be necessary to change this selection. See figure 6.2.
Figure 6.2. New Query dialog box.

New Query	?	×
This wizard creates a select query from the fields you pick.	Simple Query Wizard Crosstab Query Wizard Find Duplicates Query Wizard Find Unmatched Query Wizard	
	OK Cancel	

- 6.4. In the New Query dialog box click Find Duplicates Query Wizard. See figure 6.3 (below).
- 6.5. Click OK at the bottom of the **New Query** dialog box. See figure 6.3.

Figure 6.3. Find Duplicates Query Wizard and Next highlighted in the New Query dialog box.



6.6. After OK is clicked in the New Query dialog box the New Query dialog box is closed and the first (table selection) Find Duplicates Query Wizard dialog box is displayed. See figure 6.4.

Figure 6.4. Table selection in the Find Duplicates Query Wizard.

Find Duplicates Query Wiz	ard
1 2 3 2 4 2 2 4	Which table or query do you want to search for duplicate field values? For example, to find cities with more than one customer you would choose a Customer table below. Table: CPA_RTI_Surgical Table: FIP_RTI Surgical
	View <u>T</u>ables <u>Q</u>ueries <u>Bo</u>th
	Cancel < <u>B</u> ack <u>N</u> ext > Einish

6.7. Click the Queries radio button in the View menu of the Find Duplicates QueryWizard dialog box. See figure 6.5 (below).

Figure 6.5. Queries radio button in the Find Duplicates Query Wizard.

Find Duplicates Query Wiza	ard
1 2 3 2 4 2 2 2 2 2 2 2	Which table or query do you want to search for duplicate field values? For example, to find cities with more than one customer you would choose a Customer table below. Table: CPA_RTI Surgical
	View Image: I
	Cancel < Back Next > Finish

- 6.8. After the Queries radio button is clicked the **Find Duplicates Query Wizard** dialog box displays a list of available queries from which to choose. See figure 6.6 (below).
- 6.9. If it is not already highlighted for selection, double click the Matches query. See figure 6.6 (below).
- 6.10. Click Next in the lower right corner of the first (table selection) Find DuplicatesQuery Wizard dialog box. See figure 6.6.

Figure 6.6. Selections and Next highlighted in the Find Duplicates Query Wizard.

Find Duplicates Query Wi	ard
1 2 3 2 4 2 2 2	Which table or query do you want to search for duplicate field values? For example, to find cities with more than one customer you would choose a Customer table below. Query: Matches
	View Iables Queries Both
	Cancel < Back Next > Einish

6.11. After Next is clicked in the first (table selection) Find Duplicates Query Wizard dialog box the second (duplicate-value fields) Find Duplicates Query Wizard dialog box is displayed. See figure 6.7.

Figure 6.7. Duplicate fields in the Find Duplicates Query Wizard.

Find Duplicates Quer	ry Wizard	
	Which fields might contain duplicate informat	ion?
-	For example, if you are looking for cities with would choose City and Region fields here.	more than one customer, you
	Available fields:	Duplicate-value fields:
	CPA-ID FIP-ID CPA-Client's case code FIP-MATTER FIP ID CPA-CPA case status FIP-STATUS CPA-Client account number CPA-File number V 	
	Cancel < <u>B</u> ack	Next > Einish

- 6.12. If it is not already highlighted for selection, click CPA-ID in the **Available fields** list on the left side of the dialog box. See figure 6.8 (below).
- 6.13. Click the add icon (>) to add the selected Available field (in this example CPA-Client's Case Code) to the Duplicate-value fields list on the right side of the dialog box. See figure 6.8 (below).

NOTE: A maximum of 10 (ten) fields can be added to the Duplicate-value fields list.

NOTE: **Do NOT** click the add all icon (>>) to add all available fields to the Duplicate-value fields list.

6.14. After the *desired field* is added to the **Duplicate-value fields** list click Next at the bottom of the second (duplicate-value fields) Find Duplicates Query Wizard dialog box. See figure 6.8.

Figure 6.8. Selections and Next highlighted in the Duplicate fields Find Duplicates Query Wizard dialog box.

Find Duplicates Que	ery Wizard	
	Which fields might contain duplicate information?	
-	For example, if you are looking for cities with more than one customer, you would choose City and Region fields here.	
	Available fields: Duplicate-value fields:	
	FIP-ID CPA-Client's case code FIP-MATTER FIP ID CPA-CPA case status FIP-STATUS CPA-Client account number CPA-File number FIP-FILE NUMBER C CPA-ID CPA-ID CPA-ID CPA-ID CPA-Client account number CPA-File number C C CPA-File number C C 	
	Cancel < <u>B</u> ack <u>N</u> ext > <u>F</u> inish	

6.15. After Next is clicked in the second (duplicate-value fields) Find Duplicates Query
 Wizard dialog box the third (additional query fields) of the Find Duplicates Query
 Wizard dialog box is displayed. See figure 6.9.

Figure 6.9. Additional fields in the Find Duplicates Query Wizard.

Find Duplicates Que	ry Wizard	
	Do you want the query to show fields in ad For example, if you chose to look for duplic CustomerName and Address here.	dition to those with duplicate values? ate City values, you could choose
	Available fields: FIP-ID CPA-Client's case code FIP-MATTER FIP ID CPA-CPA case status FIP-STATUS CPA-Client account number CPA-File number FIP-FILE NUMBER	Additional query fields:
	Cancel < <u>B</u> ack	Next > Einish

- 6.16. Click the add all icon (>>) to add all available fields to the Additional query fields list on the right side of the third Find Duplicates Query Wizard dialog box. See figure 6.10 (below).
- 6.17. After clicking the add all icon (>>) the Additional query fields are populated with all available fields previously listed on the left side (available fields) of the Find Duplicates Query Wizard dialog box. See figure 6.10 (below).
- 6.18. Click Next at the bottom of the third (additional query fields) Find Duplicates QueryWizard dialog box. See figure 6.10.

Figure 6.10. Selections and Next highlighted in the Additional fields Find Duplicates Query Wizard Dialog box.

Find Duplicates Que	ry Wizard	
	Do you want the query to show fields in ad For example, if you chose to look for duplic CustomerName and Address here.	ldition to those with duplicate values? ate City values, you could choose
	Available fields:	Additional query fields:
		CPA-Patent / Design number FIP-PATENT NUMBER CPA-Application number FIP-APPLICATION NUMBER FIP-ANNUITY PAYMENT PROVIL FIP-CPA GLOBAL CPA-Country name FIP-COUNIRY
	Cancel < <u>B</u> ack	Next > Einish

6.19. After Next is clicked in the third (additional query fields) Find Duplicates Query
 Wizard dialog box the fourth (name and save) Find Duplicates Query Wizard dialog box is displayed. See figure 6.11.

Figure 6.11. Name and save in the Find Duplicates Query Wizard.

Find Duplicates Query Wizard	
What Find a Do you O Material Do you O Material Do you	do you want to name your query? Juplicates for Matches u want to view the query results, or modify the query design? ew the results. odify the design.
	Cancel < <u>B</u> ack <u>N</u> ext > <u>F</u> inish

6.20. Click in the data entry field to name the **Query** as *Duplicates between the table source(s)*. Example: CPA ID Duplicates. See figure 6.12 (below).

NOTE: The radio button next to **View the results** should be selected by default. If it is not already selected click the radio button next to **View the results** to select it. See figure 6.12 (below).

6.21. Click Finish at the bottom of the fourth (name and save) Find Duplicates Query Wizard dialog box. See figure 6.12.

Figure 6.12. Selections and Finish in the name and save Find Duplicates Query Wizard dialog box.

Find Duplicates Query Wizard	1
	What do you want to name your query? CPA ID Duplicates
	Do you want to view the query results, or modify the query design? ● <u>View the results.</u> ● <u>M</u> odify the design.
	Cancel < Back Next > Finish

6.22. After Finish is clicked in fourth (name and save) Find Duplicates Query Wizard dialog box the wizard is closed and the newly generated query is displayed on the left under All Access Objects- Queries. See figure 6.13.

Figure 6.13. Newly created Duplicates query listed in All Access Objects.

₽ <											Dat	abase3	: Database- C:\U	sers\bwalton\l	Documents\Dat
File	Home Create	Exterr	nal Dat	a D	atab	ase Tools	Help	, Сте	ll me what	you want	to do				
View	Paste Format Pai	inter	Filter	2 ↓ Aso A↓ Des A Rer	cendin scendi move (ng Ty Sel ng 🛄 Ad Sort 🍸 Tog	ection • vanced • ggle Filter	Refresh All •	៉ New 🛃 Save	∑ Tot Spe Mc	als elling ore •	Find	ab ⇔ac Replace ➔ Go To ▾ ↳ Select ▾	Calibri B I U	• 1 <u>A</u> • <u>ab</u> • ;
Views	Clipboard	ra l			Sort 8	& Filter			Recor	ds			Find		Text F
All Ad	cess Objects					CPA_RTI Surg	jical 💷	FIP_RTI Sur	gical	CPA ID D	uplicates		Duplicates from C	PA Table to Qu	ery Matches 🔾
Search				Ω		CPA-ID	CPA-0	Country 👻	СРА-туре	e na 👻 Ci	РА-Рате	nt, -	CPA-Current -	CPA-Curren	nt 🛛 CPA-Pro
Tables				~	*	(Ne	ew)								
	A RTI Surgical			~											
E FIP	_RTI Surgical														
Queries				*											
CP/	A ID Duplicates														
Du	plicates from CPA Table to	o Query N	latches												
Du	plicates from FIP Table to	Query Ma	atches												

6.23. The query usually generates data indicating no duplicates were found (no records listed in the results data). See figure 6.14.

Figure 6.14. No duplicate records found in the new query.

CPA-Client's 🕶

6.24. If any duplicates are found export the data generated by the query to a separate tab in an Excel spreadsheet file using the procedure outlined in the <u>Exporting Access</u>

Query Data to MS Excel section (Section 10) (below).

NOTE: The expected result is no duplicates were found. Any duplicates revealed during this research must be investigated.

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7. Finding Duplicate Records Using Primary Key FIP ID and Matches Query in MS Access

- 7.1. Click Create in the Access menu bar at the top of the page. See figure 7.1 (below).
- 7.2. Click Query Wizard in the **Create** menu. See figure 7.1.

Figure 7.1. Query Wizard in the Create menu.



7.3. After clicking Query Wizard in the Create menu the New Query dialog box is displayed. See figure 7.2 (below).

NOTE: The **New Query** dialog box defaults to the **Simple Query Wizard** selected. It will be necessary to change this selection. See figure 7.2.

Figure 7.2. New Query dialog box.

New Query	? ×
This wizard creates a select query from the fields you pick.	Simple Query Wizard Crosstab Query Wizard Find Duplicates Query Wizard Find Unmatched Query Wizard
	OK Cancel

7.4. In the New Query dialog box click Find Duplicates Query Wizard. See figure 7.3 (below).

7.5. Click OK at the bottom of the **New Query** dialog box. See figure 7.3.

Figure 7.3. Find Duplicates Query Wizard and Next highlighted in the New Query dialog box.

New Query	? ×
	Simple Query Wizard
1 2 2	Find Duplicates Query Wizard
This without creates a guery that	Find Unmatched Query Wizard
finds records with duplicate field values in a single table or query.	
	OK Cancel

7.6. After OK is clicked in the New Query dialog box the New Query dialog box is closed and the first (table selection) Find Duplicates Query Wizard dialog box is displayed. See figure 7.4.

Figure 7.4. Table selection in the Find Duplicates Query Wizard.

	Which table or query do you want to search for duplicate field values?
1 3 2 4 2 2 2 2 2 2 2 2	For example, to find cities with more than one customer you would choose a Customer table below. Table: CPA_RTI Surgical Table: FIP_RTI Surgical
	View Tables Queries Both

7.7. Click the Queries radio button in the View menu of the Find Duplicates QueryWizard dialog box. See figure 7.5.

Figure 7.5. Queries radio button in the Find Duplicates Query Wizard.

Find Duplicates Query Wize	ard
	Which table or query do you want to search for duplicate field values?
1 2 3 2 4 2 2 4	For example, to find cities with more than one customer you would choose a Customer table below. Table: CPA_RTI Surgical Table: FIP_RTI Surgical
	View Image: I
	Cancel < Back Next > Einish

- 7.8. After the Queries radio button is clicked the **Find Duplicates Query Wizard** dialog box displays a list of available queries from which to choose. See figure 7.6 (below).
- 7.9. If it is not already highlighted for selection, double click the Matches query. See figure 7.6 (below).
- 7.10. Click Next in the lower right corner of the first (table selection) Find DuplicatesQuery Wizard dialog box. See figure 7.6.

Figure 7.6. Selections and Next highlighted in the Find Duplicates Query Wizard.

Find Duplicates Query Wiza	rd
	Which table or query do you want to search for duplicate field values? For example, to find cities with more than one customer you would choose a Customer table below. Ouery: Duplicates from CPA Table and Matches Quer Query: Matches View View Tables Queries O Both
	Cancel < Back Next > Finish

7.11. After Next is clicked in the first (table selection) Find Duplicates Query Wizard dialog box the second (duplicate-value fields) Find Duplicates Query Wizard dialog box is displayed. See figure 7.7.

Figure 7.7. Duplicate fields in the Find Duplicates Query Wizard.

Find Duplicates Query Wizard							
	Which fields might contain duplicate information?						
	For example, if you are looking for cities with more than one customer, you would choose City and Region fields here.						
	Available fields: Duplicate-value fields:						
	CPA-ID FIP-ID CPA-Client's case code FIP-MATTER FIP ID CPA-CPA case status FIP-STATUS CPA-Client account number CPA-File number CPA-File number Image: CPA-File number Image: CPA-File number Image: CPA-File number						
	Cancel < <u>B</u> ack <u>N</u> ext > <u>F</u> inish						

- 7.12. If it not already highlighted for selection, click FIP-ID in the Available fields list on the left side of the dialog box. See figure 7.8 (below).
- 7.13. Click the add icon (>) to add the selected Available field (in this example CPA-Client's Case Code) to the Duplicate-value fields list on the right side of the dialog box. See figure 7.8 (below).

NOTE: A maximum of 10 (ten) fields can be added to the Duplicate-value fields list.

NOTE: **Do not** click the add all icon (>>) to add all available fields to the Duplicate-value fields list.

- 7.14. After the *desired field* is added to the **Duplicate-value fields** list click Next at the bottom of the second (duplicate-value fields) **Find Duplicates Query Wizard** dialog box. See figure 7.8.
- Figure 7.8. Selections and Next highlighted in the Duplicate fields Find Duplicates Query Wizard dialog box.

Find Duplicates Que	ery Wizard					
Which fields might contain duplicate information?						
	For example, if you are looking for cities with more than one customer, you would choose City and Region fields here.					
	Available fields: Duplicate-value fields:					
	CPA-ID CPA-Client's case code FIP-MATTER FIP ID CPA-CPA case status FIP-STATUS CPA-Client account number CPA-File number FIP-FILE NUMBER					
	Cancel < <u>B</u> ack <u>N</u> ext > <u>F</u> inish					

7.15. After Next is clicked in the second (duplicate-value fields) Find Duplicates Query
 Wizard dialog box the third (additional query fields) of the Find Duplicates Query
 Wizard dialog box is displayed. See figure 7.9.

Figure 7.9. Additional fields in the Find Duplicates Query Wizard.

Find Duplicates Que	ry Wizard			
	Do you want the query to show fields in addition to those with duplicate values? For example, if you chose to look for duplicate City values, you could choose CustomerName and Address here.			
	Available fields: CPA-ID CPA-Client's case code FIP-MATTER FIP ID CPA-CPA case status FIP-STATUS CPA-Client account number CPA-File number FIP-FILE NUMBER	Additional query fields:		
	Cancel < <u>B</u> ack	Next > Einish		

- 7.16. Click the add all icon (>>) to add all available fields to the Additional query fields list on the right side of the third Find Duplicates Query Wizard dialog box. See figure 7.10 (below).
- 7.17. After clicking the add all icon (>>) the Additional query fields are populated with all available fields previously listed on the left side (available fields) of the dialog box. See figure 7.10 (below).
- 7.18. Click Next at the bottom of the third (additional query fields) Find Duplicates QueryWizard dialog box. See figure 7.10.

Figure 7.10. Selections and Next highlighted in the Additional fields Find Duplicates Query Wizard Dialog box.

Find Duplicates Que	ry Wizard			
	Do you want the query to show fields in addition to those with duplicate values? For example, if you chose to look for duplicate City values, you could choose CustomerName and Address here.			
	Available fields:	Additional query fields:		
		CPA-Patent / Design number FIP-PATENT NUMBER CPA-Application number FIP-APPLICATION NUMBER FIP-ANNUITY PAYMENT PROVIL FIP-CPA GLOBAL CPA-Country name FIP-COUNTRY		
	Cancel < <u>B</u> ack	x <u>N</u> ext > <u>F</u> inish		

7.19. After Next is clicked in the third (additional query fields) Find Duplicates Query
 Wizard dialog box the fourth (name and save) Find Duplicates Query Wizard dialog box is displayed. See figure 7.11.

Figure 7.11. Name and save in the Find Duplicates Query Wizard.

Find Duplicates Query Wizard					
	What do you want to name your query? ind duplicates for Matches Do you want to view the query results, or modify the query design? ýiew the results. Modify the design.				
	Cancel < <u>B</u> ack <u>Next</u> > <u>Finish</u>				

7.20. Click in the data entry field to name the **Query** as *Duplicates between the table source(s)*. Example: FIP ID Duplicates. See figure 7.12 (below).

NOTE: The radio button next to **View the results** should be selected by default. If it is not already selected click the radio button next to **View the results** to select it. See figure 7.12 (below).

7.21. Click Finish at the bottom of the fourth (name and save) Find Duplicates QueryWizard dialog box. See figure 7.12.

Figure 7.12. Selections and Finish in the name and save Find Duplicates Query Wizard dialog box.

Find Duplicates Query Wizard				
	What do you want to name your query? FIP ID Duplicates Do you want to view the query results, or modify the query design?			
 O Modify the design. 				
	Cancel < <u>B</u> ack <u>N</u> ext > <u>Finish</u>			

7.22. After Finish is clicked in fourth (name and save) Find Duplicates Query Wizard dialog box the wizard is closed and the newly generated query is displayed on the left under All Access Objects- Queries. See figure 7.13.

Figure 7.13. Newly created Duplicates query listed in All Access Objects.

🖬 5° ở 👎		Da	itabase3 : Database- C:\U	sers\bwalton\Documents\Database3	accdb (Access 2007 - 2016 file for	nat) - Access
File Home Create External Dat	ta Database Tools Help	ho Tell me what you want to do				
View Paste Format Painter	2↓ Ascending ▼ Selection • 2↓ Descending Im Advanced • 2∞ Remove Sort ▼ Toggle Filter	Refresh All * X Delete * More *	Find Select → Go To →	Calibri ▼ 11 B I U ▲ • ▲		
Views Clipboard 5	Sort & Filter	Records	Find	Text Formattin	ng Gil	
All Access Objects	« CPA_RTI Surgical	FIP_RTI Surgical CPA ID Duplicates	Uplicates from C	PA Table to Query Matches 👌 📑 Du	plicates from FIP Table to Query Ma	tches FIP ID Duplicates
Search	P FIP-ID FIP-N	ATTER - FIP-FILE NUN - FIP-COU	NTR - FIP-MATTER -	FIP-STATUS - FIP-EXPIRAT -	FIP-APPLICA - FIP-PATENT	+ FIP-NUMBER + FIP-ANN
Tables	* (New)					
CPA_RTI Surgical						
FIP_RTI Surgical						
Queries	*					
CPA ID Duplicates						
Duplicates from CPA Table to Query Matches	5					
Duplicates from FIP Table to Query Matches						
FIP ID Duplicates						
Matches						

7.23. The query usually generates data indicating no duplicates were found (no records listed in the results data). See figure 7.14.

Figure 7.14. No duplicate records found in the new query.

1	FIP ID Duplicates							
2	FIP-ID 👻	FIP-MATTER -	FIP-FILE NUN -	FIP-COUNTR -	FIP-MATTER -	FIP-STATUS 👻	FIP-EXPIRAT 👻	
*	(New)							

7.24. If any duplicates are found export the data generated by the query to a separate tab in an Excel spreadsheet file using the procedure outlined in the Exporting Access

Query Data to MS Excel section (Section 10) (below).

NOTE: The expected result is no duplicates were found. Any duplicates revealed during this research must be investigated.

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8. Finding Unmatched Records Between CPA Table and Matches Query in MS Access

- 8.1. Click Create in the menu bar at the top of the page. See figure 8.1 (below).
- 8.2. Click Query Wizard in the **Create** menu. See figure 8.1.

Figure 8.1. Query Wizard in the Create menu.



8.3. After Query Wizard is clicked in the **Create** menu the **New Query** dialog box is displayed. See figure 8.2 (below).

NOTE: The **New Query** dialog box defaults to the **Simple Query Wizard** selected. It will be necessary to change this selection. See figure 8.2.

Figure 8.2. New Query dialog box.

New Query	?	\times
This wizard creates a select query from the fields you pick.	Simple Query Wizard Crosstab Query Wizard Find Duplicates Query Wizard Find Unmatched Query Wizard	
	OK Cancel	

- 8.4. In the New Query dialog box click Find Unmatched Query Wizard. See figure 8.3 (below)
- 8.5. Click OK at the bottom of the **New Query** dialog box. See figure 8.3.

Figure 8.3. Find Unmatched and OK highlighted in the New Query Wizard dialog box.



- 8.6. After OK is clicked in the **New Query** dialog box the **New Query** dialog box is closed and the first (table/query selection) **Find Unmatched Query Wizard** dialog box is displayed. See figure 8.4.
- Figure 8.4. Table selection in the Find Unmatched Query Wizard dialog box.

Find Unmatched Query Wizard					
	The query you create will list records in the table you select below that have no related records in the table you select on the next screen. For example, you can find customers that have no orders.				
	Which table or query contains records you want in the query results? Table: CPA_RTI Surgical Table: FIP_RTI Surgical				
	View <u>Iables</u> <u>Queries</u> <u>Both</u>				
	Cancel < Back Next > Einish				

8.7. Double click the table name containing the *data to be compared in this Query*. See figure 8.5 (below).

NOTE: The radio button next to **Tables** in the **View** section of the **Find Unmatched Query Wizard** should be checked by default. If it is not checked, click the radio button next to **Tables** to select it. See figure 8.5 (below).

Do not click Next until the following steps (8.8 through 8.10) are complete. See figure 8.5.

Figure 8.5. Selections in the table selection Find Unmatched Query Wizard dialog box.

Find Unmatched Query Wizard					
	The query you create will list records in the table you select below that have no related records in the table you select on the next screen. For example, you can find customers that have no orders.				
Which table or query contains records you want in the query results?					
3	View Image: I				
	Cancel < Back Next > Finish				

8.8. After selecting the *Table* for the query, click the Queries radio button in the View section under the list of tables in the Find Unmatched Query Wizard dialog box. See figure 8.6 (below).

NOTE: When repeating these steps for subsequent queries it is important to ensure that the correct original query is selected. See figure 8.6.

Figure 8.6. Queries radio button in the Find Unmatched Query Wizard dialog box

Find Unmatched Query Wizard					
The query you create will list records in the table you select below that ha no related records in the table you select on the next screen. For example you can find customers that have no orders.					
	Which table or query contains records you want in the query results? Table: CPA_RTI Surgical Table: FIP_RTI Surgical				
	View Image: I				
	Cancel < Back Next > Einish				

8.9. After clicking the Queries radio button the **Find Unmatched Query Wizard** dialog box displays a *list of available queries* from which to choose (and) the **Queries** radio button is highlighted. See figure 8.7

Figure 8.7. Available queries list.

Find Unmatched Query Wizard					
Which table or query contains the related records?					
	For example, if you've already selected customers and you're looking for customers without orders, you would choose orders here.				
1 2 3 4 1 2 4	Query: Duplicates from CPA Table and Matches Quer Query: Duplicates from FIP Table and Matches Query Query: Matches				
	View				
O <u>T</u> ables					
	Cancel < <u>B</u> ack <u>N</u> ext > Einish				

- 8.10. If it not already highlighted for selection, double click the <u>query name</u> containing the *related records to this query* (Matches). See figure 8.8 (below).
- 8.11. After selection of the query containing related records is complete click Next at the bottom of the second **Find Unmatched Query Wizard** dialog box. See figure 8.8.

Figure 8.8. Selections and Next highlighted in the related records Find Unmatched Query Wizard dialog box

Find Unmatched Query Wizard					
	Which table or query contains the related records?				
1	For example, if you've already selected customers and you're looking for customers without orders, you would choose orders here.				
2 3 4 1 2 4	Query: Duplicates from CPA Table and Matches Query Query: Duplicates from EIP Table and Matches Query Query: Matches View O Iables Queries O Lables O Both				
	Cancel < <u>B</u> ack <u>N</u> ext > Einish				

8.12. After Next is clicked in the second (related records) Find Unmatched Query Wizard dialog box the third (duplicate fields) Find Unmatched Query Wizard dialog box is displayed. See figure 8.9.

Figure 8.9. Duplicate fields Find Unmatched Query Wizard dialog box.

Find Unmatched Query Wizard						
	What piece of information is in both tables?					
	For example, a Customers and an Orders table may both have a CustomerID field. Matching fields may have different names.					
1	Select the matching field in each table and then dick the $\langle = \rangle$ button.					
3	Fields in 'CPA_RTI Surgical' :	Fields in 'Matches' :				
4 1 2	CPA-ID CPA-Country name	CPA-ID FIP-ID	^			
4	CPA-Type name CPA-Patent / Design number	CPA-Client's case code FIP-MATTER FIP ID				
	CPA-Current renewal date CPA-Current annuity	CPA-CPA case status FIP-STATUS				
	CPA-Proprietor CPA-Client's reference	CPA-Client account number CPA-File number	•			
	Matching fields:					
	Cancel < <u>B</u> ad	ck <u>N</u> ext > ⊟nish				

8.13. Click CPA-ID in the left Fields column. See figure 8.10 (below).

8.14. Click CPA-ID in the **right Fields** column. See figure 8.10 (below).

NOTE: The variables for CPA-Client's Case Code (or) FIP-FIP MATTER ID may appear in either table depending upon the guery being created.

- 8.15. Click the match fields (<=>) icon between the two Fields lists. See figure 8.10 (below).
- 8.16. After clicking the match fields icon (<=>) the matching fields are displayed in the **Matching Fields** data display box under the Fields listings. See figure 8.10 (below).
- 8.17. Click Next at the bottom of the third (duplicate fields) Find Unmatched QueryWizard dialog box. See figure 8.10.

Figure 8.10. Selections and Next highlighted in the duplicate fields Find Unmatched Query Wizard dialog box

Find Unmatched Query Wizard						
	What piece of information is in both tables?					
	For example, a Customers and an Orders table may both have a CustomerID field. Matching fields may have different names.					
1	Select the matching field in each table and then dick the $<=>$ button.					
3	Fields in 'CPA_RTI Surgical' :	Fields in 'Matches' :				
4 1	CPA-ID	CPA-ID				
4	CPA-Type name	CPA-Client's case code EIP-MATTER EIP ID				
	CPA-Current renewal date	CPA-CPA case status				
	CPA-Proprietor	CPA-Client account number				
	Matching fields: CPA-ID <=> CPA-I	D				
	Cancel < <u>B</u> ack	Next > Einish				

8.18. After clicking Next in the third (duplicate fields) Find Unmatched Query Wizard dialog box the fourth (visible fields) Find Unmatched Query Wizard dialog box is displayed. See figure 8.11.

Figure 8.11. Visible fields Find Unmatched Query Wizard dialog box.

Find Unmatched Qu	Find Unmatched Query Wizard						
	What fields do you want to see in the query results?						
	Available fields:	Selected fields:					
1 2 3 4	CPA-ID CPA-Country name CPA-Type name CPA-Patent / Design number CPA-Current renewal date CPA-Current annuity CPA-Proprietor CPA-Client's reference						
	Cancel <	Back Next > Finish					

- 8.19. Click the Add All icon (>>) to add all available fields to the query. See figure 8.12 (below).
- 8.20. After clicking the Add All icon (>>) all available fields are now displayed in the Selected Fields column of the fourth Find Unmatched Query Wizard dialog box. See figure 8.12 (below)
- 8.21. Click Next at the bottom of the fourth (visible fields) **Find Unmatched Query Wizard** dialog box. See figure 8.12.

Figure 8.12. Selections and Next highlighted in the visible fields Find Unmatched Query Wizard dialog box.

Find Unmatched Query Wizard						
	What fields do you want to see in the query results?					
	Available fields:	Selected fields:				
1		 CPA-Proprietor CPA-Client's reference CPA-CPA case status CPA-Client account number CPA-Client's case code CPA-File number CPA-Application number CPA-Explicit date 				
	Cancel < <u>B</u> ack	Next > Einish				

8.22. After Next is clicked in the fourth (visible fields) Find Unmatched Query Wizard dialog box the fifth (save and finish) Find Unmatched Query Wizard dialog box is displayed See figure 8.13.

Figure 8.13. Save and finish Find Unmatched Query Wizard dialog box.

Find Unmatched Query Wizard					
	What would you like to a CPA_RTI Surgical With That's all the information Do you want to view the O View the results. O Modify the design.	name your query? out Matching Matc n the wizard need e query results, or	ches is to create your qu r modify the query	ery. design?	
	Cancel	< <u>B</u> ack	Next >	Einish	

8.23. Click in the data entry field under **What would you like to name your query?** to name the query for the *fields used in creation of the Query*- Example: Unmatched from CPA (or) Unmatched from FIP. See figure 8.14 (below).

NOTE: The query name should include any tables or queries used in its generation.

NOTE: The radio button next to **View the results** should be selected by default. If it is not already selected click the radio button next to **View the results** to select it. See figure 8.14 (below).

8.24. Click Finish at the bottom of the fifth (save and finish) Find Unmatched QueryWizard dialog box. See figure 8.14.

Figure 8.14. Selections and Finish highlighted in the save and finish Find Unmatched Query Wizard dialog box.

Find Unmatched Query Wizard					
	What would you like to r Imatched from CPA T That's all the information Do you want to view the Image Wiew the results. Image Modify the design.	name your query? Table to Matches C In the wizard needs e query results, or	Query s to create your qu r modify the query	ery. design?	
	Cancel	< <u>B</u> ack	<u>N</u> ext >	Einish	

- 8.25. After Finish is clicked in the fifth (save and finish) Find Unmatched Query Wizard dialog box the wizard is closed.
- 8.26. The newly generated Query is displayed on the left under All Access Objects-Queries (and) the name of the query is updated on its workspace tab. See figure 8.15.

Figure 8.15. Newly created Unmatched query listed in All Access Objects.

🖬 5° °° 🔹				RTI Surgical : Dat	abase- C:\Users\bwalt	on\Documents	s\Procedures\RTI S	iurgical.accdb (Access 2007 - 2016 fil	e format) - Acces	5	
File Home Create External Data	a Datab	ase Tools Help 🔎 Tel	I me what you wa	ant to do							
Application Parts * Table Table SharePoint Design Lists *	Jery Query zard Design	Form Form Blank Navi Design Form Torm	n Wizard gation * Repo e Forms *	ort Report Blank Design Report	Report Wizard	Macro 😤	Module Class Module Visual Basic				
Templates Tables	Queries	Forms		Repo	rts	Macros	& Code				
All Access Objects	🗩 « 🛄	CPA_RTI Surgical FIP_RTI Sur	gical 🔚 Matche	es 🔚 Duplicate	s from CPA Table and I	datches Query	Uplicates	from FIP Table and Matches Query	Unmatched fr	om CPA Table to N	Natches Query
Search_	0 4	CPA-ID CPA-Country -	CPA-Type na 👻	CPA-Patent, •	CPA-Current - CP	A-Current -	CPA-Proprie -	CPA-Client's • CPA-CPA cas •	CPA-Client a 🔹	CPA-Client's •	CPA-File nur
Tables		1 U.S.A.	Large Entity Pa	8241330	14-Feb-16 1		LANX INC	SPINOUS PROC Other channel	2243699	300.127US1	
CDA DTI Sussiani	^	2 European Unio	Design	000586094-000	6-Sep-16 11		RTI SURGICAL,	Abandoned	2243699		
		3 European Unio	Design	000586102-000	6-Sep-16 11		RTI SURGICAL,	Abandoned	2243699		
FIP_RTI Surgical		4 European Unio	Design	000586102-000	6-Sep-16 11		RTI SURGICAL,	Abandoned	2243699		
Queries	*	5 European Unio	Design	000586102-000	6-Sep-16 11		RTI SURGICAL,	Abandoned	2243699		
Duplicates from CPA Table and Matches Quer	ry	6 European Unio	Design	000586102-000	6-Sep-16 11		RTI SURGICAL,	Abandoned	2243699		
Duplicates from FIP Table and Matches Query	,	7 European Unio	Design	000586102-000	6-Sep-16 11		RTI SURGICAL,	Abandoned	2243699		
Matches		8 European Unio	Design	000586102-000	6-Sep-16 11		RTI SURGICAL,	Abandoned	2243699		
interest in the second		9 European Unio	Design	000586102-000	6-Sep-16 11		RTI SURGICAL.	Abandoned	2243699		
Unmatched from CPA Table to Matches Query	y	10 European Unio	Design	000586102-000	6-Sep-16 11		RTI SURGICAL,	Abandoned	2243699		

8.27. The number of records displayed in the Unmatched query should match the difference between the sources of the query data- example the difference between matches and the CPA-derived table. The number of records in the Unmatched query should equal the difference between the Matches query and each table. In the case of this example the difference between 1943 records and 1911 records was 32 records. See figure 8.16.

Figure 8.16. Record total highlighted.

212	Great Britain	Patent	2414680
220	U.S.A.	Large Entity Pa	5614205
228	New Zealand	Late Granted P	523461
230	U.S.A.	Small Entity Pa	5456722
231	U.S.A.	Small Entity Pa	5628756
240	U.S.A.	Small Entity Pa	13/666718
241	U.S.A.	Large Entity Pa	DIVOF11/83984
242	U.S.A.	Large Entity Pa	6730092
Record: I of 93		No Filter Search	EC40003

8.28. Export the data to generated by the query to a separate tab in an Excel spreadsheet file using the procedure outlined in the <u>Exporting Access Query Data to MS Excel</u> <u>section (Section 10)</u> (below).

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9. Finding Unmatched Records Between FIP Table and Matches Query in MS Access

- 9.1. Click Create in the menu bar at the top of the page. See figure 9.1 (below).
- 9.2. Click Query Wizard in the **Create** menu. See figure 9.1.

Figure 9.1. Query Wizard in the Create menu.



9.3. After Query Wizard is clicked in the **Create** menu the **New Query** dialog box is displayed. See figure 9.2 (below).

NOTE: The **New Query** dialog box defaults to the **Simple Query Wizard** selected. It will be necessary to change this selection. See figure 9.2.

Figure 9.2. New Query dialog box.
New Query	ſ	×
This wizard creates a select query from the fields you pick.	Simple Query Wizard Crosstab Query Wizard Find Duplicates Query Wizard Find Unmatched Query Wizard	

- 9.4. In the New Query dialog box click Find Unmatched Query Wizard. See figure 9.3 (below)
- 9.5. Click OK at the bottom of the **New Query** dialog box. See figure 9.3.

Figure 9.3. Find Unmatched and OK highlighted in the New Query Wizard dialog box.

New Query	? ×
This wizard creates a query that finds records (rows) in one table that have no related records in another table.	Simple Query Wizard Crosstab Query Wizard Find Unmatched Ouery Wizard
	OK Cancel

9.6. After OK is clicked in the **New Query** dialog box the **New Query** dialog box is closed and the first (table/query selection) **Find Unmatched Query Wizard** dialog box is displayed. See figure 9.4.

Figure 9.4. Table selection in the Find Unmatched Query Wizard dialog box.

Find Unmatched Query	Wizard			
	The query you create will list records in the table you select below that have no related records in the table you select on the next screen. For example, you can find customers that have no orders.			
1 2 3 4 2 4 2 4	Which table or query contains records you want in the query results? Table: CPA_RTI_Surgical Table: FIP_RTI Surgical			
	View Image: I			
	Cancel < Back Next > Einish			

9.7. Double click the table name containing the *data to be compared in this Query*. See figure 9.5 (below).

NOTE: The radio button next to **Tables** in the **View** section of the **Find Unmatched Query Wizard** should be checked by default. If it is not checked, click the radio button next to **Tables** to select it. See figure 9.5 (below).

Do not click Next until the following steps (9.8 through 9.10) are complete. See figure 9.5.

Figure 9.5. Selections in the table selection Find Unmatched Query Wizard dialog box.

Find Unmatched Query Wizard			
	The query you create will list records in the table you select below that have no related records in the table you select on the next screen. For example, you can find customers that have no orders.		
	Which table or query contains records you want in the query results?		
	View Image: I		
	Cancel < Back Next > Einish		

9.8. After selecting the *Table* for the query, click the Queries radio button in the View section under the list of tables in the Find Unmatched Query Wizard dialog box. See figure 9.6 (below).

NOTE: When repeating these steps for subsequent queries it is important to ensure that the correct original query is selected.

Figure 9.6. Queries radio button in the Find Unmatched Query Wizard dialog box

Find Unmatched Query Wizard			
	The query you create will list records in the table you select below that have no related records in the table you select on the next screen. For example, you can find customers that have no orders.		
Which table or query contains records you want in the query results?			
	Cancel < Back Next > Einish		

9.9. After clicking the Queries radio button the **Find Unmatched Query Wizard** dialog box displays a *list of available queries* from which to choose (and) the **Queries** radio button is highlighted. See figure 9.7

Figure 9.7. Available queries list.

Find Unmatched Query	Wizard			
	Which table or query contains the related records?			
	For example, if you've already selected customers and you're looking for customers without orders, you would choose orders here.			
1 2 3 4 1 Query: Duplicates from CPA Table and Matches Quer Query: Duplicates from FIP Table and Matches Quer Query: Matches Query: Unmatched from CPA Table to Matches Quer				
	View			
	O Iables O Queries O Both			
	Cancel < <u>B</u> ack <u>N</u> ext > Einish			

- 9.10. If it is not already highlighted for selection, double click the <u>query name</u> containing the *related records to this query* (Matches). See figure 9.8 (below).
- 9.11. After selection of the query containing related records is complete click Next at the bottom of the second **Find Unmatched Query Wizard** dialog box. See figure 9.8.

Figure 9.8. Selections and Next highlighted in the related records Find Unmatched Query Wizard dialog box

Find Unmatched Query	Wizard	
	Which table or query contains the related records?	
	For example, if you've already selected customers and you're looking for customers without orders, you would choose orders here.	
2 Query: Duplicates from CPA Table and Matches Quer 3 Query: Duplicates from FIP Table and Matches Quer 4 1 2 Query: Matches Query: Onmatched from CPA Table to Matches Quer Query: Onmatched from CPA Table to Matches Quer		
	View	
	O Iables O Queries O Both	
	Cancel < <u>B</u> ack <u>N</u> ext > Einish	

9.12. After Next is clicked in the second (related records) Find Unmatched Query Wizard dialog box the third (duplicate fields) Find Unmatched Query Wizard dialog box is displayed. See figure 9.9.

Figure 9.9. Duplicate fields Find Unmatched Query Wizard dialog box.

Find Unmatched Query Wizard					
	What piece of information is in both tables?				
	For example, a Customers and an Orders table may both have a CustomerID field. Matching fields may have different names.				
1	Select the matching field in each table and then dick the $\langle = \rangle$ button.				
3	Fields in 'FIP_RTI Surgical' :	Fields in 'Matches' :			
4 1 2	FIP-ID	CPA-ID			
	FIP-COUNTRY FIP-MATTER TYPE DESCRIPT	FIP-MATTER FIP ID CPA-CPA case status			
	FIP-STATUS FIP-STATUS				
	FIP-APPLICATION NUMBER 🗸	CPA-File number 🗸 🗸			
	Matching fields:				
	Cancel < <u>B</u> ack	Next > Einish			

9.13. Click FIP-ID in the left Fields column. See figure 9.10 (below).

9.14. Click FIP-ID in the **right Fields** column. See figure 9.10 (below).

NOTE: The variables for CPA-Client's Case Code (or) FIP-FIP MATTER ID may appear in either table depending upon the query being created.

- 9.15. Click the match fields (<=>) icon between the two Fields lists. See figure 9.10 (below).
- 9.16. After clicking the match fields icon (<=>) the matching fields are displayed in the
 Matching Fields data display box under the Fields listings. See figure 9.10 (below).
- 9.17. Click Next at the bottom of the third (duplicate fields) Find Unmatched QueryWizard dialog box. See figure 9.10.

Figure 9.10. Selections and Next highlighted in the duplicate fields Find Unmatched Query Wizard dialog box

Find Unmatched Query Wizard					
What piece of information is in both tables?					
	For example, a Customers and an Orders table may both have a CustomerID field. Matching fields may have different names.				
1	Select the matching field in each table and then click the $\langle = \rangle$ button.				
3	Fields in 'FIP_RTI Surgical' :	Fields in 'Matches' :			
4 1					
4	FIP-FILE NUMBER FIP-COUNTRY FIP-MATTER TYPE DESCRIPT FIP-STATUS FIP-EXPIRATION DATE	CPA-Client's case code FIP-MATTER FIP ID CPA-CPA case status FIP-STATUS CPA-Client account number			
	FIP-APPLICATION NUMBER 💗	CPA-File number 🗸 🗸			
	Matching fields: FIP-ID <=> FIP-II	D			
Cancel < <u>B</u> ack <u>N</u> ext > <u>F</u> inish					

9.18. After clicking Next in the third (duplicate fields) Find Unmatched Query Wizard dialog box the fourth (visible fields) Find Unmatched Query Wizard dialog box is displayed. See figure 9.11.

Figure 9.11. Visible fields Find Unmatched Query Wizard dialog box.

Find Unmatched Qu	ery Wizard				
	What fields do you want to see in the query results?				
	Available fields:	Selected fields:			
1 2 3 4 1	FIP-ID FIP-MATTER FIP ID FIP-FILE NUMBER FIP-COUNTRY FIP-MATTER TYPE DESCRIPTIOI FIP-STATUS FIP-EXPIRATION DATE FIP-APPLICATION NUMBER				
	Cancel < Ba	ack <u>N</u> ext > <u>F</u> inish			

- 9.19. Click the Add All icon (>>) to add all available fields to the query. See figure 9.12 (below).
- 9.20. After clicking the Add All icon (>>) all available fields are now displayed in the
 Selected Fields column of the fourth Find Unmatched Query Wizard dialog box.
 See figure 9.12 (below)
- 9.21. Click Next at the bottom of the fourth (visible fields) **Find Unmatched Query Wizard** dialog box. See figure 9.12.
- Figure 9.12. Selections and Next highlighted in the visible fields Find Unmatched Query Wizard dialog box.

Find Unmatched Query Wizard				
	What fields do you want to see in the query results?			
	Available fields:	Selected fields:		
		 FIP-MATTER TYPE DESCRIPTIO FIP-STATUS FIP-EXPIRATION DATE FIP-APPLICATION NUMBER FIP-PATENT NUMBER FIP-PATENT NUMBER FIP-NUMBER OF DESIGNATED 5 FIP-ANNUITY PAYMENT PROVID FIP-CPA GLOBAL 		
	Cancel < <u>B</u> ack	: <u>N</u> ext > <u>F</u> inish		

9.22. After Next is clicked in the fourth (visible fields) Find Unmatched Query Wizard dialog box the fifth (save and finish) Find Unmatched Query Wizard dialog box is displayed See figure 9.13.

Figure 9.13. Save and finish Find Unmatched Query Wizard dialog box.

Find Unmatched Query Wizard				
	What would you like to r CPA_RTI Surgical With That's all the information Do you want to view the O View the results. Modify the design.	name your query? out Matching Matc n the wizard needs e query results, or	thes s to create your qu r modify the query	ery. design?
	Cancel	< <u>B</u> ack	<u>N</u> ext >	<u>F</u> inish

9.23. Click in the data entry field under **What would you like to name your query?** to name the query for the *fields used in creation of the Query*- Example: Unmatched from CPA (or) Unmatched from FIP. See figure 9.14 (below).

NOTE: The query name should include any tables or queries used in its generation.

NOTE: The radio button next to **View the results** should be selected by default. If it is not already selected click the radio button next to **View the results** to select it. See figure 9.14 (below).

9.24. Click Finish at the bottom of the fifth (save and finish) Find Unmatched QueryWizard dialog box. See figure 9.14.

Figure 9.14. Selections and Finish highlighted in the save and finish Find Unmatched Query Wizard dialog box.

Find Unmatched Query	Wizard
	What would you like to name your query? Unmatched from FIP Table to Matches Query That's all the information the wizard needs to create your query. Do you want to view the query results, or modify the query design? <u>Wi</u>ew the results. <u>M</u>odify the design.
	Cancel < <u>B</u> ack <u>Next</u> > <u>Finish</u>

- 9.25. After Finish is clicked in the fifth (save and finish) Find Unmatched Query Wizard dialog box the wizard is closed.
- 9.26. The newly generated Query is displayed on the left under All Access Objects-Queries (and) the name of the query is updated on its workspace tab. See figure 9.15.

Figure 9.15. Newly created Unmatched query listed in All Access Objects.

ਜ਼ ਨਾ ∂ਾ ਦ		RTI Surgical : D	atabase- C:\Users\bwalton\De	ocuments\Procedures\RTI Surgical.accdb ((Access 2007 - 2016 file format) - Acc	ess (1997)	Bill Wa
File Home Create External Data D	Database Tools Help 🔎 T	ell me what you want to do					
Application Parts *	uery sign Form Form Blank I Na Design Form I Mo	rm Wizard vigation ~ pre Forms * Report Blar Design Report	Report Wizard	≪ Module Class Module Wisual Basic			
Templates Tables Queries	s Forms	Rej	ports	Macros & Code			
All Access Objects • «	CPA_RII Surgical PIP_RII Su	urgical (Matches) Duplica	tes from CPA Table and Match	Duplicates from FIP Table	and Matches Query	from CPA Table to Matches Query	Unmatched from FIP Table to Matches Query
Search	Z FIP-ID · FIP-MATTER ·	FIP-FILE NUN + FIP-COUNTR	+ FIP-MATTER + FIP-SD	ATUS + FIP-EXPIRAT + FIP-APPLICA	A . FIP-PATENT . FIP-NUMBER	FIP-ANNUTI FIP-CPA GLC	
Tables *	31 385690	200.016EP1 EP	Utility - NSPCT Issued	Oct 22, 2024 04/96100.8	167/846 0	Annuity Payme CPA Global	
CPA RTI Surgical	58 385615	200.004AU1 AU	Utility - NSPCT Abande	oned Nov 14, 2016 11192/97	714465 0		
	59 385616	200.004BE1 BE	Utility - EPPAT Abando	oned Nov 14, 2016 96941993.6	0865288 0		
HP_RII Surgical	60 385617	200.004BE2 BE	Utility - DIV Abando	oned Nov 14, 2016 03075752.0	1321516 0		
Queries *	61 385618	200.004CA1 CA	Utility - NSPCT Abande	oned Nov 14, 2016 2,239,498	2,239,498 0		
Duplicates from CPA Table and Matches Query	62 385619	200.004DE1 DE	Utility - EPPAT Abando	oned Nov 14, 2016 96941993.6	0865288 0		
Duplicates from FIP Table and Matches Query	63 385620	200.004DE2 DE	Utility - DIV Abando	oned Nov 14, 2016 03075752.0	1321516 0		
Matches	64 385621	200.004FR1 FR	Utility - EPPAT Abande	oned Nov 14, 2016 96941993.6	0865288 0		
	65 385622	200.004FR2 FR	Utility - DIV Abande	oned Nov 14, 2016 03075752.0	1321516 0		
Unmatched from CPA fable to Matches Query	66 385623	200.004GB1 GB	Utility - EPPAT Abande	oned Nov 14, 2016 96941993.6	0865288 0		
Unmatched from FIP Table to Matches Query	67 385624	200.004GB2 GB	Utility - DIV Abande	oned Nov 14, 2016 03075752.0	1321516 0		
	68 385625	200.004171	Litility - EPPAT Abande	oped Nov 14, 2016, 96941993, 6	0865288 0		

9.27. The number of records displayed in the Unmatched query should match the difference between the sources of the query data- example the difference between matches and the FIP-derived table. The number of records in the Unmatched query should equal the difference between the Matches query and each table. In the case of this example the difference between 1943 records and 1911 records was 32 records. See figure 9.16.

Figure .16. Record total highlighted.

l	212	Great Britain	Patent	2414680
	220	U.S.A.	Large Entity Pa	5614205
	228	New Zealand	Late Granted P	523461
	230	U.S.A.	Small Entity Pa	5456722
	231	U.S.A.	Small Entity Pa	5628756
	240	U.S.A.	Small Entity Pa	13/666718
	241	U.S.A.	Large Entity Pa	DIVOF11/83984
	242	U.S.A.	Large Entity Pa	6730092
	Record: I of 93		No Filter Search	EC40007

9.28. Export the data to generated by the query to a separate tab in an Excel spreadsheet file using the procedure outlined in the Exporting Access Query Data to MS Excel section (Section 10) (below).

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10. Exporting Access Query Data to MS Excel

- 10.1. Open MS Access.
- 10.2. Open the table (or) query from which data is to be exported to Excel.

10.3. After the file is open click the upper left corner of the data field display. See figure 10.1.

Figure 10.1. Upper left corner of the Matches query data display.

B	5-∂-∓									
File	Home	Create	Ext	ternal D	ata C)atabase	Tools	٦	ell me w	/hat you
View	Paste	it PPY rmat Paint	er	Filter	2↓ Asce A↓ Desc A Rem	ending ending ove Sort	Ty Selec Adva Togg	ction [,] anced gle Fili	Rei	fresh
Views	Clipbo	ard	E.		2	5ort & Fi	lter			
	ccess Oh	oie 🕞	«		latches					
Creat		Je			CPA-ID	*	FIP-ID	Ŧ	CPA-Cl	ient's 🗸
Seurchin						13		1021	117073	6
lables	5		^			14		1023	117073	8
R	TI-Surgical_CPA_	20190508				15		1020	117073	5
🛄 R	TISurgical-FIP_20	0190508				16		1024	117073	9
Querie	25		*			17		1022	117073	7
N E	latches					18		557	733353	
						19		149	385701	

10.4. After the upper left corner of the data display is clicked all cells in the data field display turn blue. See figure 10.2.

Figure 10.2. Query results highlighted.

(internet)	Matches								
\angle	CPA-ID	~	FIP-ID	CPA-Client's -	FIP-MATTER -	CPA-CPA cas 👻	FIP-STATUS 👻	CPA-Client a 🗸	CPA-File nur 👻
		13	102	1 1170736	1170736	Awaiting instru	Issued	2243699	300.188DE1
		14	102	3 1170738	1170738	Awaiting instru	Issued	2243699	300.188ES1
		15	102	0 1170735	1170735	Awaiting instru	Issued	2243699	300.188FR1
		16	102	4 1170739	1170739	Awaiting instru	Issued	2243699	300.188GB1
		17	102	2 1170737	1170737	Awaiting instru	Issued	2243699	300.188IT1
		18	55	7 733353	733353	None	Issued	2243699	300.103US3
		19	14	9 385701	385701	None	Issued	2243699	200.016US3
		20	13	385685	385685	None	Issued	2243699	200.015US3
		21	65	1 988627	988627	None	Issued	2243699	300.148US2
		22	65	5 988637	988637	None	Issued	2243699	300.150US1
		23	65	988625	988625	Awaiting instru	Issued	2243699	300.148US1
		24	64	7 988606	988606	None	Issued	2243699	300.147US2
		25	63	7 988550	988550	None	Issued	2243699	300.145US2
		26	63	5 988549	988549	None	Issued	2243699	300.145US1
		27	63	5 988542	988542	None	Issued	2243699	300.144US1
		28	63	3 988490	988490	None	Issued	2243699	300.143US2
		29	63	2 988484	988484	None	Issued	2243699	300.143US1

- 10.5. With the query results highlighted click CTRL + C to copy the selected data in the query.
- 10.6. Open Excel.
- 10.7. Click Blank Workbook in the **Templates** dialog box. See figure 10.3.

NOTE: If Excel is already open or in use, select File and then New from the Excel menu bar at the top of the Excel screen.

Figure 10.3. Blank Workbook in the Templates dialog box in Excel.

A B	c		
1		Get started with	Make your first
3	Take a tour	Formulas	PivotTable
4	Blank workbook		
6	(→	fx	
7			
Blank workbook	Welcome to Excel	Formula tutorial	PivotTable tutorial
Blank workbook	Welcome to Excel	Formula tutorial	PivotTable tutorial
Blank workbook	Welcome to Excel	Formula tutorial	PivotTable tutorial PirotTable tutorial
Blank workbook	Welcome to Excel	Formula tutorial	PivotTable tutorial
Blank workbook	Welcome to Excel	Formula tutorial	PivotTable tutorial
Blank workbook Get more out of PivotTables	Welcome to Excel Going beyond Pie charts	Formula tutorial	PivotTable tutorial

10.8. After the blank workbook file is open click in <u>cell A1</u> in the upper left corner of the screen. See figure 10.4.

Figure 10.4. Cell A1 highlighted in Excel.

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- 10.9. Click CRTL+V to copy the *selected Access data* to the Excel spreadsheet.
- 10.10. After CTRL+V is clicked the data from Access is copied to the Excel spreadsheet. See figure 10.5.

Figure 10.5. Data copied to the Excel spreadsheet.

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10.11. Click Data in the Menu bar. See figure 10.6 (below).

10.12. Select Filter in the Data menu to add data filtering options. See figure 10.6.

Figure 10.6. Filter in the in the Excel Data menu.

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10.13. After Filter is selected in the **Data** menu, down carets are displayed in the column headers with filtering options listed in the column-specific dropdown menus. See figures 10.7 and 10.8

Figure 10.7.	Down carets ne	ext to column	headings	indicating	filters h	have been	added.
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Figure 10.8. Dropdown menu opened when down caret for filters is clicked.

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10.14. Click View in the Excel menu bar. See figure 10.9 (below).

10.15. Select Freeze Panes in the View menu. See figure 10.9 (below).

10.16. Select Freeze Top Row in the Freeze Panes dropdown menu. See figure 10.9.

Figure 10.9. Freeze Panes/Freeze Top Row in the Excel View menu.

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- 10.17. After Freeze Top Row is clicked in the Freeze Panes menu the top row of data (in this case the column headings row) remains visible while scrolling in the spreadsheet at all times.
- 10.18. Click Home in the menu bar. See figure 10.10 (below).
- 10.19. Click on the row header for row number 1 on the far left of the spreadsheet to select the top row of data. See figure 10.10.

Figure 10.10. Row number one highlighted in Excel.

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10.20. In the **Home** menu select Wrap Text. See figure 10.11. Figure 10.11. Wrap Text highlighted in the Excel Home menu.

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10.21. After Wrap Text is selected in the **Home** menu, row 1 is displayed with wrapped text. See figure 10.12.



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10.22. With row number 1 still selected, in the **Home Menu** select Bold. See figure 10.13. Figure 10.13. Bold highlighted in Excel.

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10.23. After Bold is selected in the **Home** menu the text in row 1 is displayed in a bold font. See figure 10.14.



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- 10.24. With row number 1 still selected, in the Home menu click the down caret next to Fill Colors (the small bucket icon). See figure 10.15 (below).
- 10.25. After the down caret is clicked the **Fill Colors Theme Colors** dialog box is displayed. See figure 10.15 (below).
- 10.26. From the **Fill Colors Theme Colors** menu select a light gray alternate fill color from the list of available colors. See figure 10.15.

Figure 10.15. Fill colors in the Excel Home menu.

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- 10.27. After the *alternate color* is selected the first row of data is shaded light gray. See figure 10.16. (below).
- 10.28. Click the triangle in the upper left corner of the data display to select all cells in the spreadsheet. See figure 10.16.

Figure 10.16. Select all corner highlighted in Excel.

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10.29. After clicking the triangle in the upper left corner all cells are selected in Excel. See figure 10.17.

Figure 10.17. All cells selected in Excel.

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- 10.30. With all cells selected, from the **Home** menu click the down caret next to **Borders**. See figure 10.18 (below).
- 10.31. After the down caret is clicked the **Borders** dropdown menu is displayed. See figure 10.18 (below).
- 10.32. In the **Borders** dropdown menu click All Borders. See figure 10.18.

Figure 10.18. Borders/All Borders highlighted in the Excel Home menu.

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10.33. After All borders is clicked in the **Borders** dropdown menu the spreadsheet is

displayed with borders around all cells. See figure 10.19 (below).

NOTE: Following steps 10.34 through 10.48 are optional. Displaying key data columns with a contrasting background can be beneficial when scrolling though large spreadsheets.

10.34. Click the column header letters above the CPA Client's Case Code and FIP- Matter
 ID columns (in this case columns C and D) to select all cells in those column(s). See figure 10.19.

Figure 10.19. Column header letters highlighted in Excel.

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- 10.35. With columns C and D still selected, in the **Home** menu click the down caret next to **Fill Colors** (the small bucket icon). See figure 10.20 (below).
- 10.36. After the down caret is clicked the **Fill Colors Theme Colors** dialog box is displayed. See figure 10.20 (below).
- 10.37. From the **Fill Colors Theme Colors** menu select yellow from the list of available colors. See figure 10.20 (below).
- 10.38. After selection of the different fill color the cells in the selected column(s) are now filled with a different color (yellow in this case). See figure 10.20.

Figure 10.20. Fill colors in the Excel Home menu.

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- 10.39. Click the <u>column header letters</u> above the FIP Annuity Payment Provider and FIP-CPA Global columns (in this case columns N and O) to select all cells in those column(s). See figure 10.21 (below).
- 10.40. With columns N and O still selected, in the **Home** menu click the down caret next to **Fill Colors** (the small bucket icon). See figure 10.21 (below).
- 10.41. After the down caret is clicked the **Fill Colors Theme Colors** dialog box is displayed. See figure 10.21 (below).
- 10.42. From the **Fill Colors Theme Colors** menu select yellow from the list of available colors. See figure 10.21 (below).
- 10.43. After selection of the different fill color the cells in the selected column(s) are now filled with a different color (yellow in this case). See figure 10.21.

Figure 10.21. Fill colors selected in Excel.

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- 10.44. Click the <u>column header letters</u> above the **CPA Case Code** and **FIP Status** columns (in this case columns E and F) to select all cells in those column(s). See figure 10.22 (below).
- 10.45. With columns F and F still selected, in the Home menu click the down caret next to **Fill Colors** (the small bucket icon). See figure 10.22 (below).
- 10.46. After the down caret is clicked the **Fill Colors Theme Colors** dialog box is displayed. See figure 10.22 (below).
- 10.47. From the **Fill Colors Theme Colors** menu select green from the list of available colors. See figure 10.22 (below).
- 10.48. After selection of the different fill color the cells in the selected column(s) are now filled with a different color (green in this case). See figure 10.22.

Figure 10.22. Fill colors selected in Excel.

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10.49. Right click the column header letters above the FIP-ID and CPA-ID columns (in this case columns A and B) to select all cells in those column(s). See figure 10.23.
 Figure 10.23. Column header letters highlighted in Excel.

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- 10.50. With columns A and B still selected right click to reveal the dropdown menu. See figure 10.24 (below).
- 10.51. Select Delete from the dropdown menu to delete the CPA-ID and FIP-ID column(s) (in this case columns A and B) from the spreadsheet. See figure 10.24.

Figure 10.24. Deleting columns in Excel.

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- 10.52. Click the *leftmost column header letter* (column C in this example). See figure 10.25 (below).
- 10.53. Press the Shift key while clicking the *rightmost column header letter* (column P in this case). See figure 10.25 (below).
- 10.54. After Shift+clicking the *rightmost column header letter* all columns in the spreadsheet are selected. See figure 10.25.

Figure 10.25. All columns selected in Excel.

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- 10.55. With the cursor in the selected cells, right click to reveal the **Formatting** dropdown menu. See figure 10.26 (below).
- 10.56. In the **Formatting** dropdown menu click Column Width. See figure 10.26.

Figure 10.26. Column Width highlighted in Excel formatting dropdown menu.

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- 10.57. After Column Width is clicked in the **Formatting** dropdown menu the **Column Width** dialog box is displayed. See figure 10.27 (below).
- 10.58. Enter 11 for the value in the **Column Width** data entry field. See figure 10.27 (below).
- 10.59. Click **OK** in the **Column Width** dialog box below the **Column Width** data entry field to complete the change. See figure 10.27.

Figure 10.27. Setting column width to 11 in Excel column width dialog box.

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10.60. After setting column width to increase readability in the spreadsheet the formatting of the data is complete. See figure 10.28 (below).

RESULT: Spreadsheet data ready for investigation.

Figure 10.28. Final appearance of imported data in Excel.

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7	733353	733353	None	Issued	2243699	300.103US3	300.103US3	9597196	9,597,196	14/974965	14/974,965	Provider	CPA Global	US

NOTE: When expedient data can be copied to additional/separate sheets (also referred to as tabs) in the same Excel workbook/file. Descriptive titling is beneficial when using multiple sheets/tabs in the same file. See figure 10.29 and 10.30.

7	733353	73335	3	None	1	ssued	2243699	300.103US3	300.103US3	9597196	9,597,196	14/97
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Figure 10.29. Renaming sheets/tabs in Excel.

Figure 10.30. Completed tabs in Excel.

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7	733353	733353	None	Issued	2243699	300.103US3	300.103US3	9597196	9,597,196	14/974965	14/974,965
8	385701	385701	None	Issued	2243699	200.016US3	200.016US3	8883184	8,883,184	12/356195	12/356,195
9	385685	385685	None	Issued	2243699	200.015US3	200.015US3	9610382	9,610,382	14/074296	14/074,296
10	988627	988627	None	Issued	2243699	300.148US2	300.148US2	9833328	9,833,328	14/592822	14/592,822
11	988637	988637	None	Issued	2243699	300.150US1	300.150US1	9861375	9,861,375	14/593579	14/593,579
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NOTE: Excel files intended for client review should not contain internal data (or) any information that might confuse or confound the client.

- 10.61. In the **Matches** tab, right click the top of the first column on the left to select that column. See figure 10.31 (below).
- 10.62. After right clicking the top of the first column a **dropdown menu** is displayed. See figure 10.31 (below).
- 10.63. From the **dropdown menu** select Insert. See figure 10.31 (below).

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5	11707	170739 1170739				struction	Issued		2243699	300.188GB1

Figure 10.31. Inserting a new column.

- 10.64. After selecting Insert a new column is displayed to the left of the former first column. See figure 10.32 (below).
- 10.65. Click cell C-1 at the top of the newly inserted column and enter *NOTES*. See figure 10.32 (below).

Figure 10.32. New Notes column inserted into spreadsheet.

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4		170735	1170735	Awaiting instruction	Issued	2243699
5		170739	1170739	Awaiting instruction	Issued	2243699

- 10.66. Enter any investigative notes or other pertinent information in the **NOTES** column as prosecution of the data progresses.
- 10.67. Once all data is copied into the Excel file click File in the Excel menu bar at the top of the page.
- 10.68. In the File menu click Save As.
- 10.69. Click This PC in the Windows **Save As** dialog box to browse to a location in which to save the file.
- 10.70. Click on the *folder in which the file is to be saved* in the Windows **Save As** dialog box.
- 10.71. Enter a *file name* in the **File name** data entry field to name the file for the query from which it was generated (Matches in this example). See figure 10.33 (below).
- 10.72. Click Save in the lower right corner of the Windows Save As dialog box to save the file to the desired location. See figure 10.33.

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Figure 10.30. Windows Dave As dialog box with sample file location, file name, and Save highlighted.

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