Download Grid Data to Excel

Overview

Data grids that display a **Download** button can be saved to a spreadsheet. This allows you to sort or manipulate the data outside of M-Pathways.

Important Information

- If this is your first time using this feature, see Set Browser Security information on page 4 before starting.

- The Download option requires that you have Microsft Excel software. It is not supported by Apple's Numbers software.

Navigation

A variety of data grids have the option to export the data to Excel, therefore there is no specific navigation path.

Contents

Based on the task, click the appropriate link or refer to the appropriate page from the chart below:

Download Grid Data to Excel
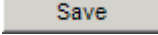
Detail Trans Page

1. Click **Download** .

Notes:

- To save the file, go to step 2.
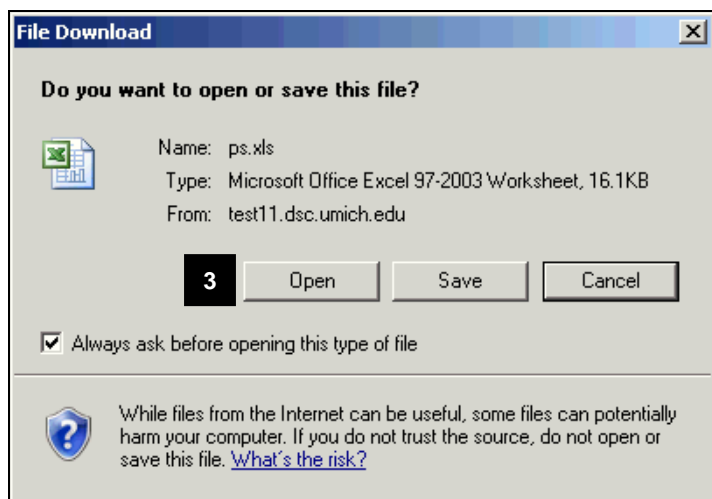
- To open the file, go to step 3.

File Download Page
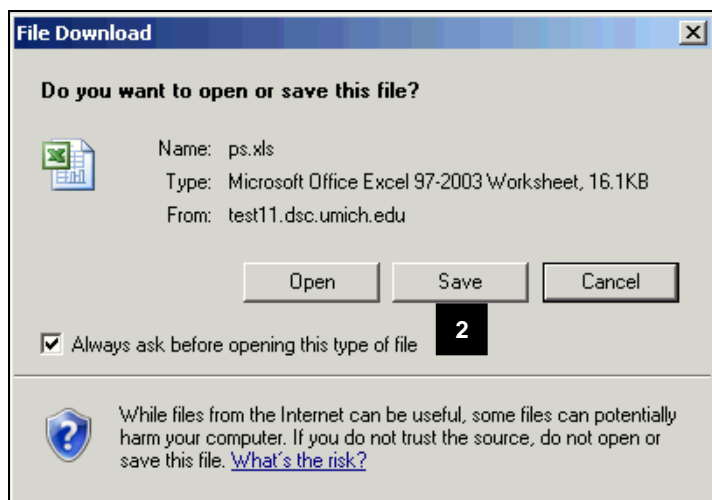
Saving the File

2. Click [Save] to save the report as an Excel file in a folder on any computer drive to which you have access.
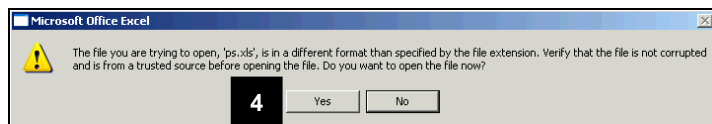
File Download Page

Opening the File

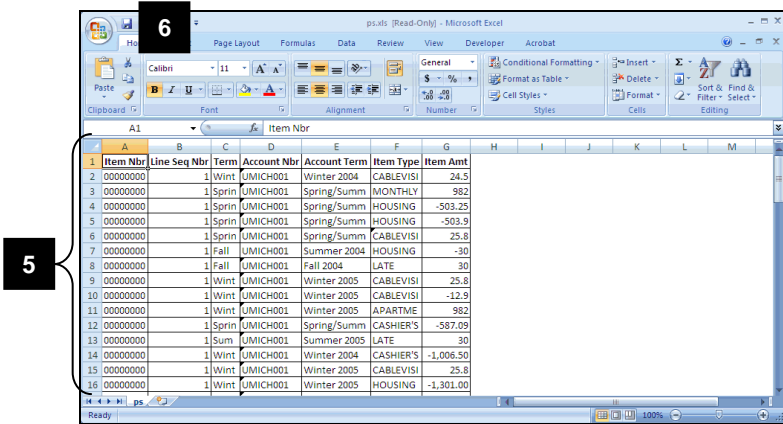3. Click [Open].

Microsoft Office Excel Dialog Box

Opening the File

4. If necessary, click [Yes] on the Microsoft Office Excel warning message.

Excel Page

Microsoft Office Excel Dialog Box
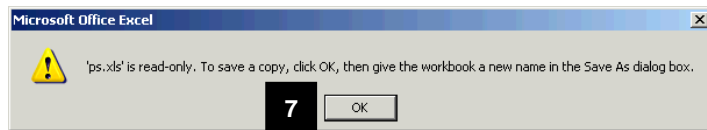

Save As Page

5. View your Excel Report.

    Notes:

    - When the report opens in Excel, it leaves a blank browser window which needs to be closed separately.

    - If you are using a pre-Office 2007 version of Excel, the report may open in the Web browser window. Select **Save As** from the **File** menu to save the report. You can save it in a folder on any computer drive to which you have access.
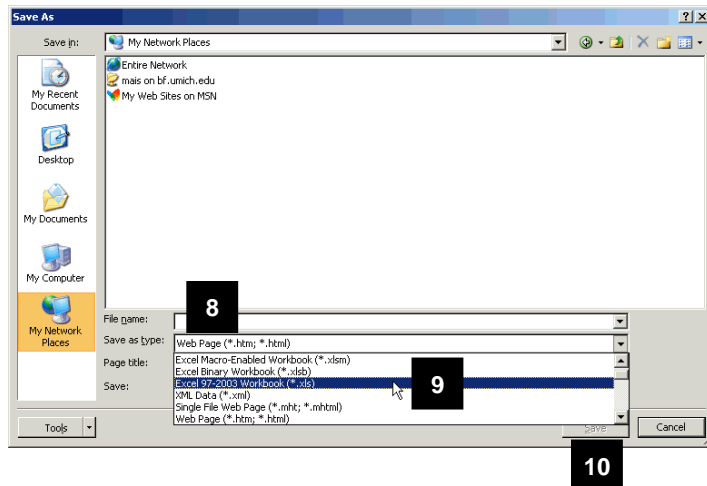
6. Click 🖫 to save the file.

7. If necessary, click ⬚ OK ⬚ on the Microsoft Office Excel dialog box.

8. Type a file name in the **File Name** field.

9. Select and appropriate Excel file type from the drop-down list in the **Save as Type** field (e.g., Excel 97_2003 Workbook (*.xls)).

10. Click ⬚ Save ⬚ .

Additional Information – Set Browser Security

If the **File Download** window does not appear after clicking **Download** ▦, you may need to adjust your Internet Explorer **Security** options to accept File Downloads.

Note: The instructions below are for Internet Explorer on a Windows computer. For instructions on setting security options for Safari in Mac OS, see the Establishing Safari Web Browser Settings for M-Pathways document on the Hardware and Software for Macintosh Computers page of the ITS website.
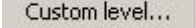
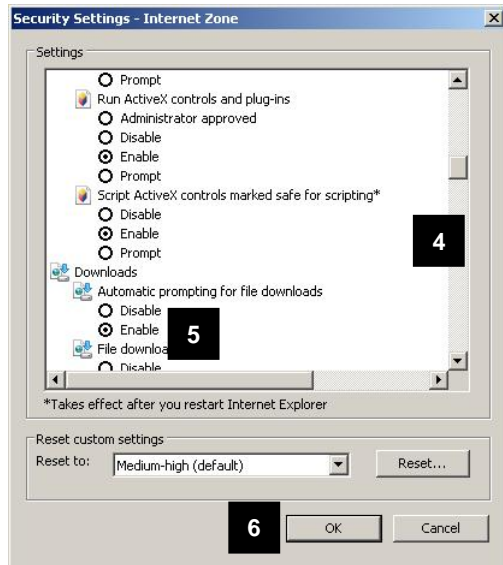**Internet Options – General Page**
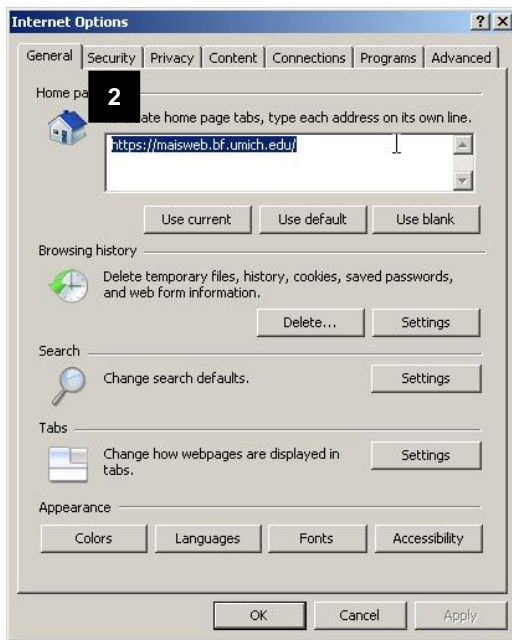
1. Select **Internet Options** from the Internet Explorer **Tools** menu.

2. Click the **Security** tab.

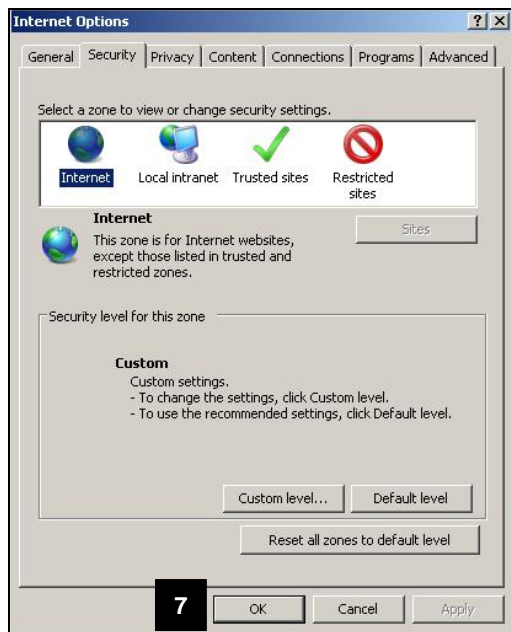**Internet Options – Security Page**

3. Click [Custom level...].
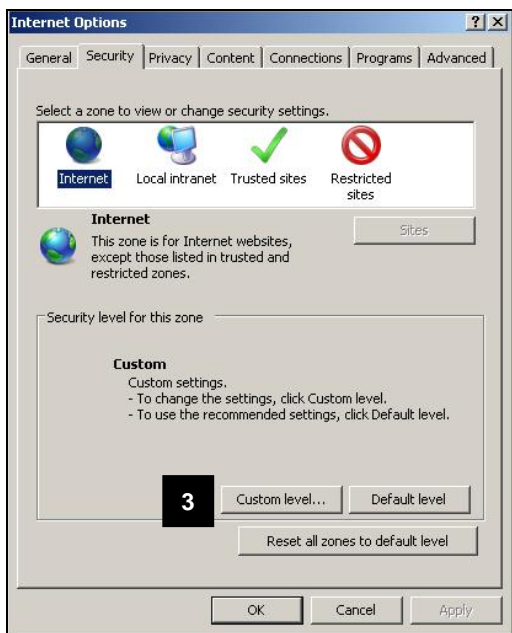
Security Settings – Internet Zone Page

4. Under Settings, scroll down to locate **Downloads** section .

5. Turn on the **Enable** radio button from the **Automatic Prompting for file downloads** list.

6. Click [OK] .

Internet Options – Security Page

7. Click [OK] .