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.

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:

If you need to…	See this page
Download Grid Data to Excel	<u>1</u>
Set Browser Security	<u>4</u>

Download Grid Data to Excel

Detail Trans Page

Detail Trans						
Business Unit:						
ID:	1234	15678 P:	strain37,Debra			
Item Description	T	em Detail		<u>Custo</u>	mize Find View All 🛄 First 🗹	1-75 of 75 🕨 Last
<u>ltem Nbr</u>	<u>Line</u> Seq Nbr	<u>Term</u>	Account Nbr	Account Term	Item Type	<u>ltem Amt</u>
00000005397573	1	Winter 2004	UMICH001	Winter 2004	CABLEVISION	24.50
00000005397584	1	Spring/Summer 2004	UMICH001	Spring/Summer 2004	MONTHLY RENT - NORTHWOOD V	982.00
00000005397586	1	Spring/Summer 2004	UMICH001	Spring/Summer 2004	HOUSING PAYROLL DEDUCTION	-503.25
000000005397591	1	Spring/Summer 2004	UMICH001	Spring/Summer 2004	HOUSING PAYROLL DEDUCTION	-503.90
000000005397593	1	Spring/Summer 2004	UMICH001	Spring/Summer 2004	CABLEVISION	25.80
00000005397602	1	Fall 2004	UMICH001	Summer 2004	HOUSING PAYROLL DEDUCTION	-30.00
00000005397610	1	Fall 2004	UMICH001	Fall 2004	LATE PAYMENT FEE	30.00
00000005397626	1	Winter 2005	UMICH001	Winter 2005	CABLEVISION	25.80
00000005397633	1	Winter 2005	UMICH001	Winter 2005	CABLEVISION ADJUSTMENT	-12.90
00000005397616	1	Winter 2005	UMICH001	Winter 2005	APARTMENT CHARGE-NW V	982.00
00000005397641	1	Spring/Summer 2005	UMICH001	Spring/Summer 2005	CASHIER'S OFFICE PAYMENT	-587.09
00000005397637	1	Summer 2005	UMICH001	Summer 2005	LATE PAYMENT FEE	30.00

1. Click Download

Notes:

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

File Download Page

File Down	load	×			
Do you	Do you want to open or save this file?				
	Name: ps.xls Type: Microsoft Office Excel 97-2003 Worksheet, 16.1KB From: test11.dsc.umich.edu				
🔽 Alwa	Open Save Cancel				
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. <u>What's the risk?</u>					

File Download Page

File Dowr	load X				
Do you want to open or save this file?					
	Name: ps.xls Type: Microsoft Office Excel 97-2003 Worksheet, 16.1KB From: test11.dsc.umich.edu				
3 Open Save Cancel					
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. <u>What's the risk?</u>					

Microsoft Office Excel Dialog Box



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.

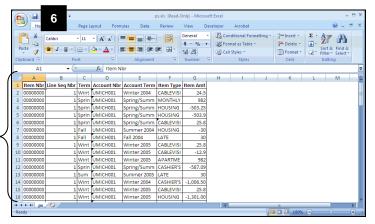
Opening the File



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

Excel Page

5



Microsoft Office Excel Dialog Box

Microsoft	: Office Excel
⊥	'ps.xls' is read-only. To save a copy, click OK, then give the workbook a new name in the Save As dialog box.

Save As Page

ave As <u>?</u>× S My Network Places 💽 🕲 • 🖄 | 🗙 📴 • Save in Entire Network mais on bf.umich.edu Ò My Recent Documents B Desktop My Documents My Computer 8 File nar Save as type: ae (*.htm: *.html) Page title: 9 Save: XML Data (*.xml) Single File Web Page (*.mht; *.mhtml) Web Page (*.htm; *.html) Tools 🔹 Cancel 10

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 \blacksquare to save the file.
- If necessary, click OK on the Microsoft Office Excel dialog box.
- 8. Type a file name in the **File Name** field.
- 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 <u>Establishing Safari Web Browser Settings for M-Pathways</u> document on the <u>Hardware and Software for Macintosh Computers</u> page of the MAIS web site.

Internet Options – General Page

Internet Options	?)
General Security Privacy Content Connection Home pa 2	
https://maisweb.bf.umich.edu/	
Use currentUse defa	ult Use blank
Browsing history Delete temporary files, history, cookies and web form information.	s, saved passwords,
Delete	. Settings
Change search defaults.	Settings
Tabs Change how webpages are displayed in tabs.	n Settings
Appearance Colors Languages Fonts	Accessibility
OK	Cancel Apply

Internet Options – Security Page

nternet Optio	ns	<u>?</u> ×
General Sec	urity Privacy Content Connections Programs Ad	vanced
Select a zon	e to view or change security settings.	_
	S 🗸 S	
Internet	Local intranet Trusted sites Restricted sites	
Int	ternet	1
exa	s zone is for Internet websites,	
Security le	vel for this zone	
	Eustom Custom settings. - To change the settings, click Custom level. - To use the recommended settings, click Default level	
	3 Custom level Default level	
<u></u>	Reset all zones to default leve	
	OK Cancel	spply

- 1. Select **Internet Options** from the Internet Explorer **Tools** menu.
- 2. Click the **Security** tab.

3. Click Custom level...

Security Settings – Internet Zone Page

Security Settings - Internet Zone × Settings O Prompt 🜒 Run ActiveX controls and plug-ins O Administrator approved O Disable • Enable O Prompt Script ActiveX controls marked safe for scripting* O Disable • Enable 4 O Prompt Automatic prompting for file downloads Actionate p Disable O Disable File downloa Disable 5 -4 Ŀ *Takes effect after you restart Internet Explorer Reset custom settings Reset to: Medium-high (default) • Reset... 6 Cancel OK

Internet Options – Security Page

nternet Op	itions
General	Security Privacy Content Connections Programs Advanced
Select a :	one to view or change security settings.
) 🧐 🗸 🚫 📗
Inter	net Local intranet Trusted sites Restricted sites
-	Internet Sites
0	This zone is for Internet websites,
Securit	/ level for this zone
	Custom Custom settings. - To change the settings, click Custom level. - To use the recommended settings, click Default level.
	Custom level Default level
	Reset all zones to default level
	7 OK Cancel Apply

- 4. Scroll down to locate Downloads.
- 5. Turn on the Enable radio button from the Automatic Prompting for file downloads list.

OK 6. Click

-		OK	
7.	Click	~~~	111