Southern Illinois University CARBONDALE

Exporting Data to a Spreadsheet

Note: You can export data from AIS, to an Excel spreadsheet and then manipulate and format the data, as desired. The example below was done using the Account Inquiry functionality, but you can export data from many of the applications as long as the Export function on the File menu is enabled.

PC Configuration

- The following must be set up on your PC in order to export data from AIS to a spreadsheet:
    - The application (e.g., Excel) must be defined within your browser, so that the browser can "launch" the application.
    - The path to the application must be defined.

- If your browser is not configured as stated above, contact your LAN Administrator or the Help Desk on your respective campus.

Retreive the Data

- In the example shown, we have performed an Account Inquiry and drilled down to the Detail Balances.
    - **Reminder:** Account inquiries show only posted entries, not available funds.

- As before, make any adjustments needed before exporting the data, such as customizing the folder to hide unwanted columns, using the Folder Tools function.
    - Refer to Unit 2: Navigation, Module 7: Folders for more information on Folder Tools.

- Now it's time to Export the Data.

Export the Data

- From the File menu, select **Export**.

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Open File

- Depending on your Browser and the version of the Browser you are using, a window similar to the one on the right will appear; this is a *Firefox* decision window.

- The window title bar is telliing us that we are opening a **.tsv** file.

- **If** your PC has been configured to open *.tsv* files in Excel, clicking OK, will open in Excel, the data that was exported. Review and save, if necessary using standard Excel save functionality.

IMPORTANT: The first time you export data using Release 12, your Browser may default to open the .tsv file with a program such as Notepad.

- To change this setting so that exported data opens in Excel, you will need to access the settings for your PC's program files and then change the default program that currently opens a file with the .tsv extension.

 *You may need help from your LAN Administrator to complete this task.*
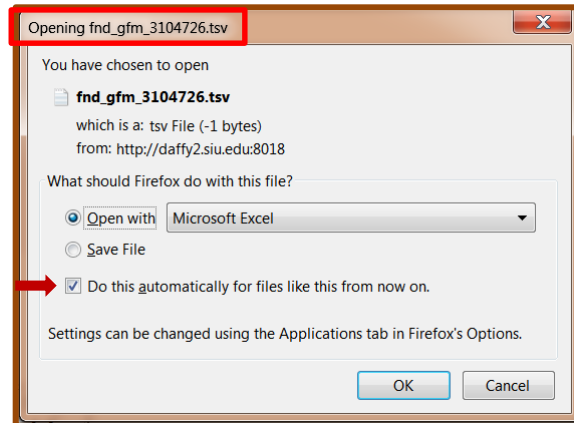
CAUTION: If you click the checkbox for "**Do this automatically for files like this from now on"**, then this decision window will be bypassed the next time you export data. To undo the setting, changes will have to be made in your browser's settings.

Save File

- Instead of opening the file, you may choose the **Save File** option.

- After selecting the "Save File" radio button, click OK to begin the download process.
  - Depending on your Browser settings, an information window may appear letting you know that the download is complete.
  - If prompted, close the Download window, when this action is complete.

Note: If using Internet Explorer, you may be prompted with a Save As window in which you will select a location to save the file.
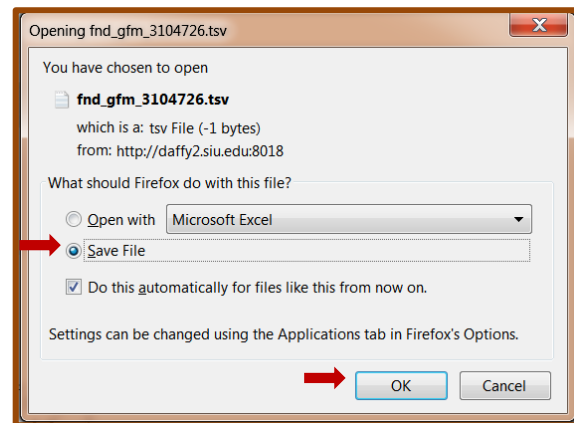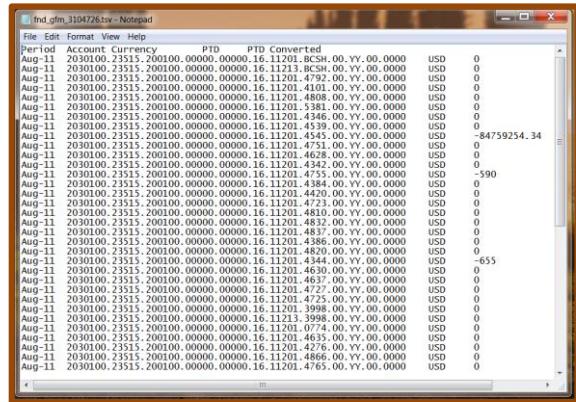
- In our example, the downloaded file saved to our desktop.

- You can click on the file to open it from here.
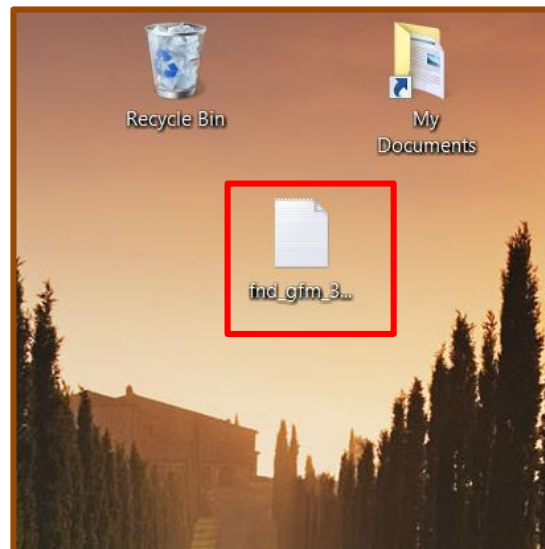
Converting .tsv File to Excel

- The screenshot on the right shows a file that opened in Notepad; the data cannot be manipulated.

- This is what will happen if your PC is not configured to open **.tsv** files in Excel.

- To open the saved file in Microsoft Excel, first open *Excel* on your PC.

- Click the *File* menu and select *Open*.
  - The Open dialogue window, as shown on the right, appears.

- Navigate to the location on your PC where the saved file resides e.g., Desktop.

- The File Type will default to *All Excel Files*. Change this setting to **All Files**.

- Then locate and select the *.tsv* file in the list.
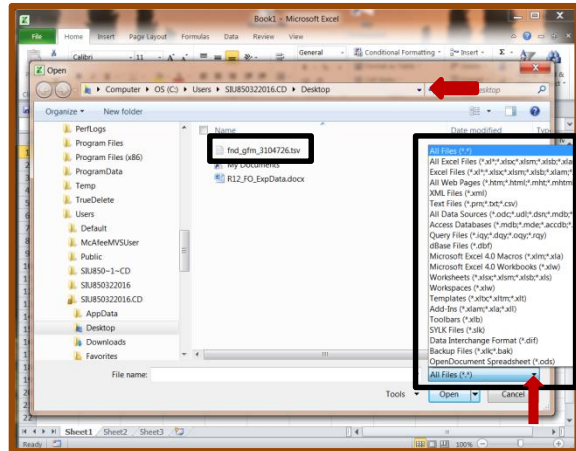
- Because the document is not in spreadsheet format, a **Text Import Wizard** opens.

- There are three steps to complete with the Wizard, so that the text in the file can be converted into a spreadsheet format.

- Step one is to choose the Data Type.
  - Select **Delimited**.

- Click the **Next>** button.
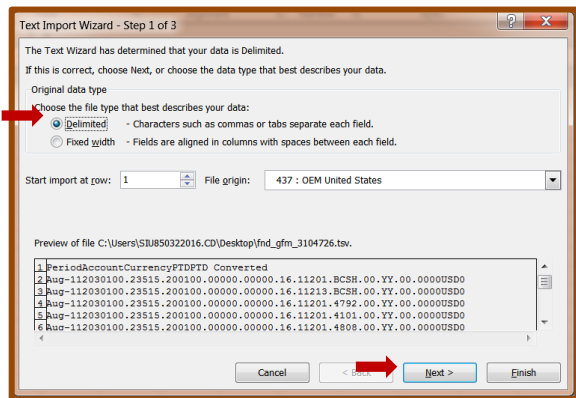
- Step two asks you how you want your data to appear.
  - Select **Tab**,
- Click the **Next>** button.
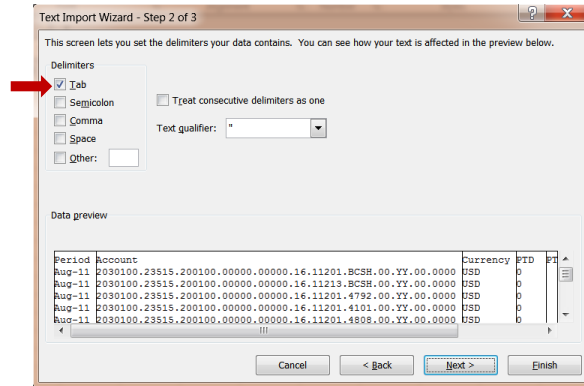
- Step three allows you to select the data format.
  - Select **General**.
- Click the **Finish** button.
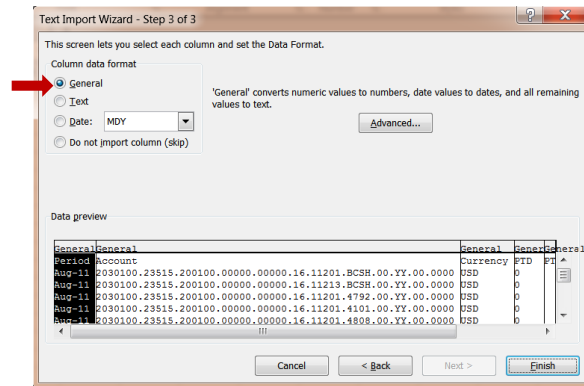
- The account information displays in Microsoft Excel.
- You can now use the Excel formatting features to make the data legible.
- **Save** or **Print** the file, as desired.
  - If you save the file, we suggest you rename the file to identify the contents.