

Financial Services Department

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Download a Report

Why would I download a report?

In order to manipulate the data, you often need to move the information from SAP into another format. The most commonly used format is Microsoft Excel. Many reports include a button specifically for downloading into excel, some do not. These instructions cover both scenarios.

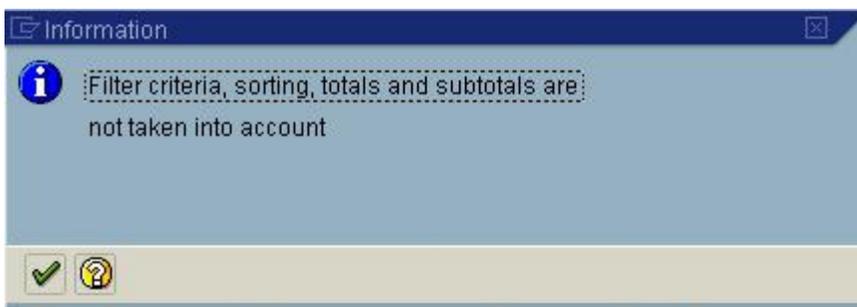
How do I download report?

Step 1. Complete the selection screen and run the report.

Step 2. When the report is completed, review the report to ensure that it contains the correct information.

Method A: Download Button

Look at the SAP screen that your report is in. Many reports have a [Excel Download](#), [Excel Overview](#) or  button. If the report has such a button, just click on it to download the report into excel. If the report you are downloading allows filtering / sub-totaling, the following pop-up box will appear.



Hit enter to accept the message. Any filtering or sub-totaling that was done in SAP will not be downloaded, but can be recreated in Excel.

A second pop-up box will appear, asking for the format of your download. You can select table for an excel workbook, or Pivot table. Once you have made your selection, click on the green checkmark.



Once you have made your selections, the system will send another pop-up box:



Simply hit enter to download the report into Excel.

Excel will automatically open for you and the report will appear there. Please be sure to SAVE the report before returning to SAP if you want to work with it in Excel. A pop-up box will appear in SAP, advising you to save the data:



If you click on the green checkmark before saving in excel, SAP will automatically close the worksheet in Excel and you will lose your download.

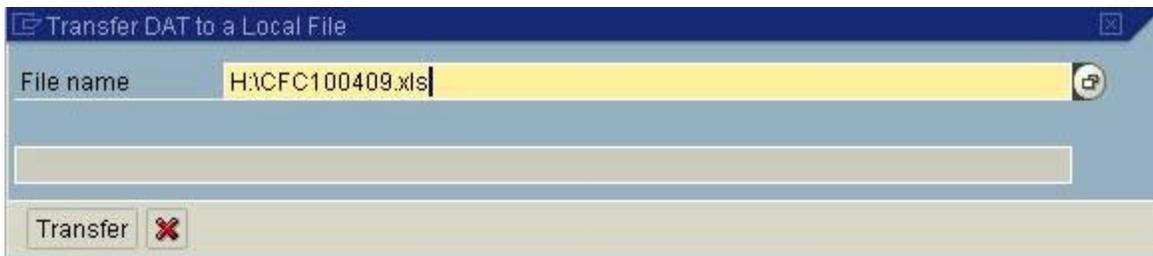
Method B: No Download Button

Step 1. To download a file into Excel, use the following menu path: System >> List >> Save >> Local File.

Step 2. A pop-up box will appear as shown below: Click on 'Spreadsheet' and then .



Step 3. Another pop-up box will appear asking for a file name. At this point, you can specify the exact directory on your computer that you want to send the file to by changing the letter to the appropriate one. Enter a name for your file that makes sense to you with '.xls' at the end and click on **Transfer**.



To open the file you will need to open Microsoft Excel, and File >> Open. Remember that the file will be saved as a text file, and so you will need to ensure that your file type is set to 'All Files'. Select the file and click on Open. A Text Import Wizard will appear to help you convert the file into Excel format. **Congratulations!!** You have now successfully downloaded a file into Excel.