

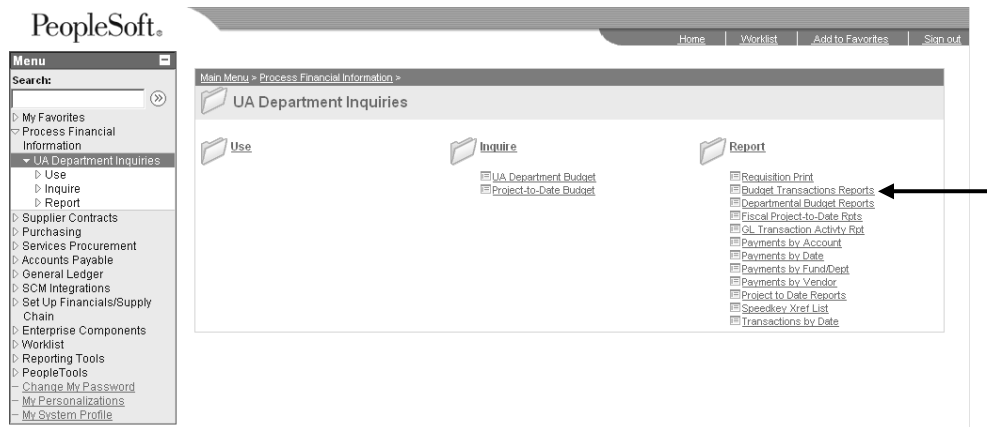
## Appendix C Creating a Budget Report as an Excel File

The process of creating a budget report as an Excel file follows the same steps as those of creating any budget report with three basic changes.

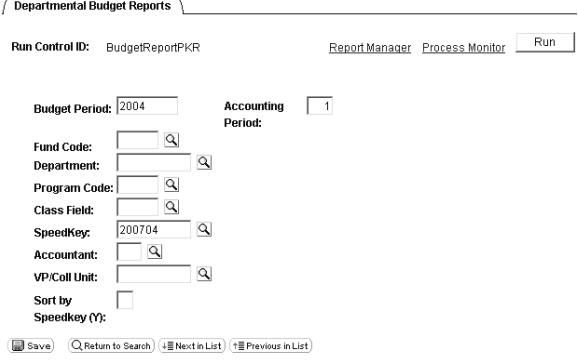
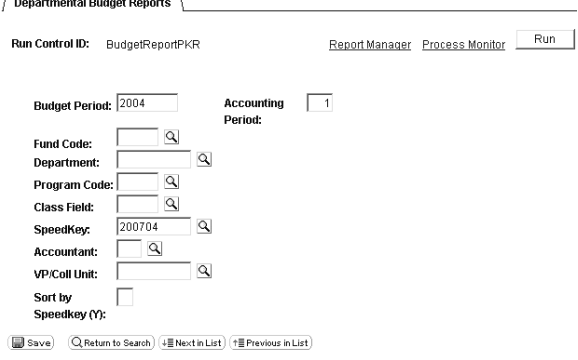
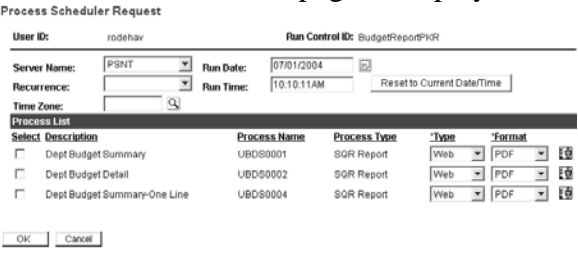
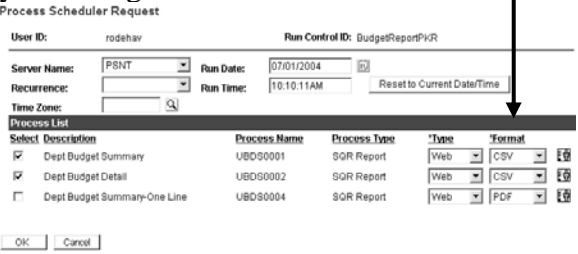
- Before creating a budget report as an Excel file for the first time, configure Internet Explorer to open the report in Excel, rather than Internet Explorer. This only needs to be done once. Follow the instructions in Appendix A.
- On the Process Scheduler page, change the **Format** of the report to **CSV**.
- Save the report as an Excel file.

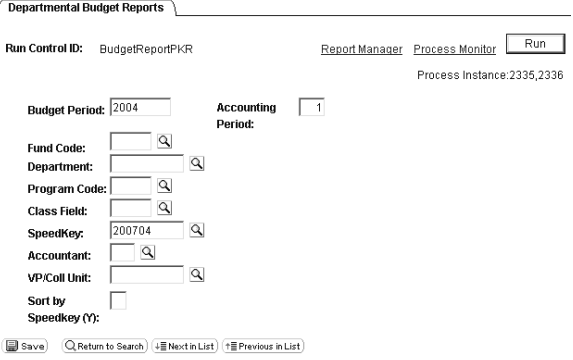
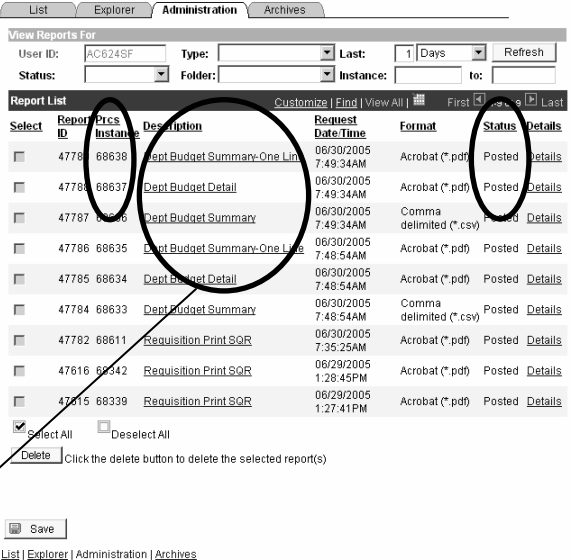
The steps to create a Budget Report as an Excel File are the same as the steps to create a Budget Report as a PDF file with a few differences. In the instructions given here, steps that are different or new are shaded in gray.

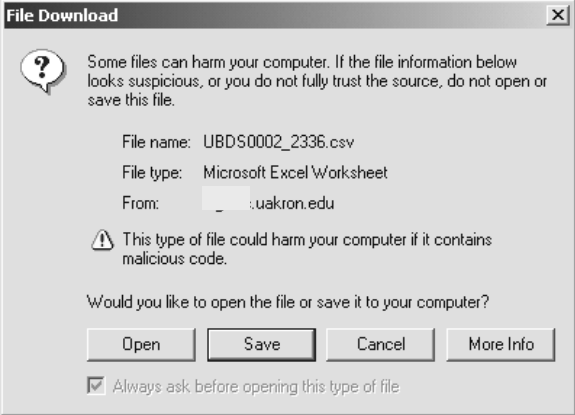
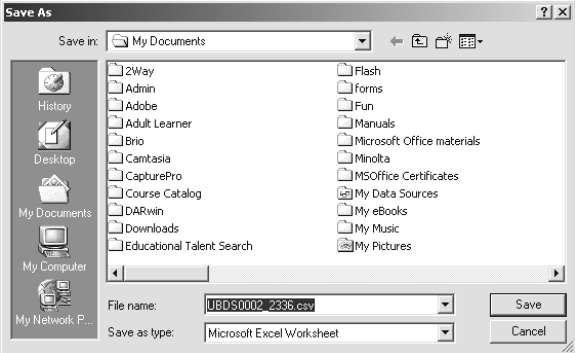
What you do	What happens
1. From the menu, select <b>Process Financial Information</b> .  Then, select <b>UA Department Inquiries</b> .	The following page is displayed.



2. In the Report list, select <b>Departmental Budget Reports</b> .	The Departmental Budget Reports – Find an Existing Value page is displayed.
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What you do	What happens
<p>3. To create a new Run Control ID, click on the Add a New Value link. Type a new ID with no spaces and no more than 16 characters. Click on the Add button.</p> <p>To use an existing Run Control ID, click on the Search button. Select the Run Control ID to use from the list of results.</p>	<p>The Departmental Budget Reports component is displayed.</p> 
<p>4. Type your criteria.</p> <p>5. Click on the Save button.</p>	<p>In this example, Budget Period 2004, Accounting Period 1 and SpeedKey 200704 are the criteria.</p> 
<p>6. Click on the Run button.</p>	<p>The Process Scheduler page is displayed.</p> 
<p>7. The Server Name should be PSNT.</p> <p>8. Do not change the Run Date or Run Time.</p> <p>9. Place a checkmark in the Select box for the reports to be run to Excel files.</p> <p>10. For each report to be run to an Excel file, be sure that the Format is CSV.</p>	<p>The Process Scheduler page is displayed with your changes.</p> 

What you do	What happens
<p>11. Click on <b>OK</b>.</p> <p>12. Note the Process Instance number(s) at the top, right of the Departmental Budget Reports component.</p>	<p>Your request is processed. The Departmental Budget Reports component is displayed with a Process Instance number for each report that you requested.</p> 
<p>13. Click on the <b>Report Manager</b> link.</p>	<p>The Report Manager component is displayed with the List page on top.</p>
<p>14. Click on the <b>Administration</b> folder tab.</p>	<p>The Administration page is displayed.</p>
<p>15. Locate the <b>Process Instance number(s)</b> in the Report List area.</p> <p>16. Click on the <b>Refresh</b> button until the Status for the reports is <b>Posted</b>.</p> <div data-bbox="191 1381 740 1528" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>The Report Name will become a hyperlink once the status is Posted. Use this hyperlink to view the report.</p> </div>	

What you do	What happens
<p>17. On the Administration page, click on the Report Description hyperlink.</p>	<p>The File Download box appears.</p> 
<p>18. Click on the Save button.</p>	<p>The Save As dialog box is displayed.</p> 
<p>19. Select the drive and folder to which the file will be saved.                  20. Type a name for the file.                  21. Verify that <u>Save as type</u> is <b>Microsoft Excel Worksheet</b>.                  22. Click on the <b>Save</b> button.</p>	<p>The report is saved as an Excel file and opened in Excel.</p>