

Work Instruction

Export Data



Purpose

Use this procedure to export SAP data to a local file such as Microsoft Excel.

Menu Path

Use the following menu path to begin this process:

- **System→List→Save→Local File**

Helpful Hints

When reviewing fields, R = Required, O = Optional and C = Conditional.

Procedure


1. Start the transaction using the menu path or transaction code.

Whatever Data You Want to Export

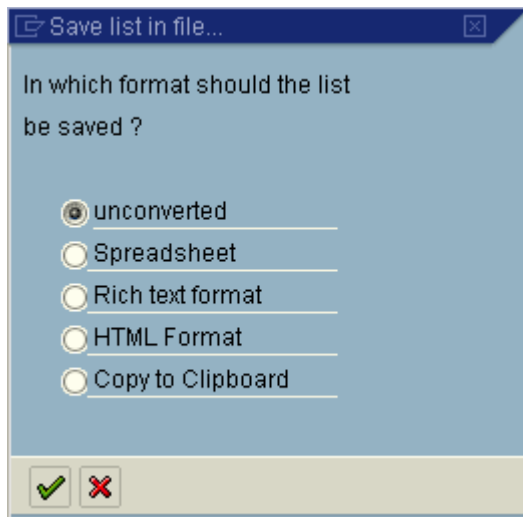
The screenshot shows the SAP interface for a 'Budget to Actual Report'. The menu path 'System -> List -> Save -> Local File' is highlighted. The report displays financial data for 'Texas State University-San Marcos' with columns for Budget, Reserved Documents, Open Encumbrances, Partial Documents, Actual, and Available Budget.

	Budget	Reserved Documents	Open Encumbrances	Partial Documents	Actual	Available Budget
Total SIFTS:	0.00	0.00	0.00	0.00	4,508.00	4,800.00
Refunds/Series:						
841704 Refunds/Reimbursements	0.00	0.00	0.00	0.00	078.50	
417040 Refunds/Reimbursements	0.00	0.00	0.00	0.00	078.50	078.50
Total Refunds/Reim:	0.00	0.00	0.00	0.00	078.50	078.50
Sales Revenue:						
801700 Sales Revenue	550,800.00	0.00	0.00	0.00	207,278.71	
417000 Sales Revenue		0.00	0.00	0.00		
Total Sales Revenue:	550,800.00	0.00	0.00	0.00	207,278.71	322,722.29
Sales-Vend:						
841710 Sales Beverage Vending	0.00	0.00	0.00	0.00	3,271.20	
417100 Sales Beverage Vending		0.00	0.00	0.00		
417101 Sales Snack Vending		0.00	0.00	0.00	248.42	
Total Sales-Vend:	0.00	0.00	0.00	0.00	3,519.62	3,519.62
Total Revenue	550,800.00	0.00	0.00	0.00	210,798.32	312,487.17
Staff Salaries:						
870100 STAFF Salaries	153,404.00	0.00	0.00	0.00	93,038.67	
701000 Unclassified Salaries		0.00	0.00	0.00		
701000 Classified Staff Salaries		0.00	0.00	0.00	8,147.76	
Total Staff Salaries:	153,404.00	0.00	0.00	0.00	101,186.43	51,216.83
Supernostory/Overtime Pay:						
870100 Supernostory/Overtime Pay	0.00					

2. Select **System→List→Save→Local File**. This works well for any data in SAP. This is the only option for the top-level (first page) of a report.

In a drill-down view within a report the Local File button  on the toolbar may be used and has the same options.

Choose File Format



Save list in file...

In which format should the list be saved ?

unconverted

Spreadsheet

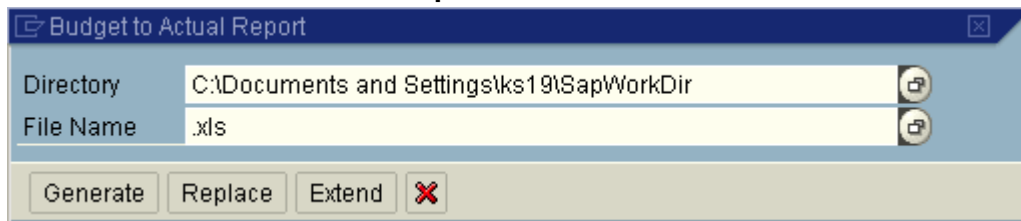
Rich text format

HTML Format

Copy to Clipboard

3. Click Spreadsheet .
4. Click to continue. If prompted for a format after choosing Spreadsheet, select **Excel Table** to get an excel file that can be modified more easily.

Choose File Save Location Step 1



Budget to Actual Report

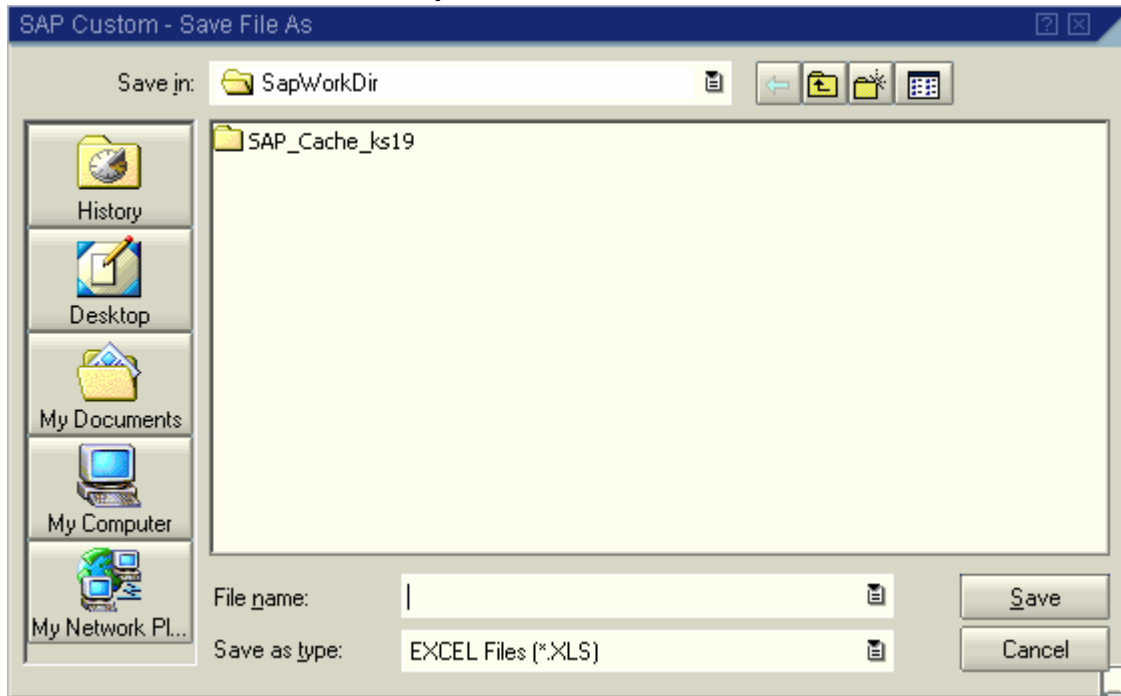
Directory C:\Documents and Settings\ks19\Sap\WorkDir


File Name .xls

Generate Replace Extend

5. Click  to the right of the Directory field to choose a different location.

Choose File Save Location Step 2



6. Click  or browse your computer to locate the directory where you want to save your file.

7. Complete the following field:

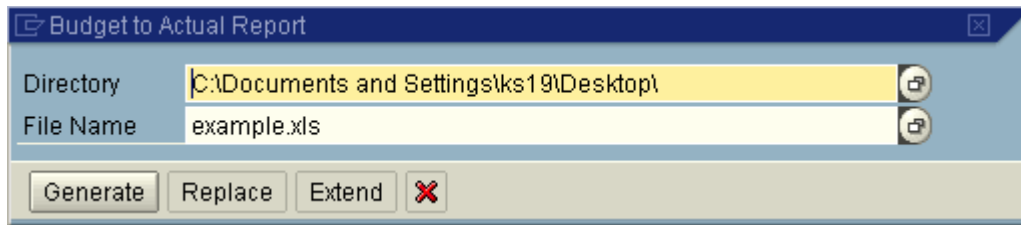
Field Name	R/O/C	Description
File <u>n</u> ame:	R	Description of the Export. Example: example.xls



You must add the proper file extension to the name of your file (.xls for Excel, .rtf for Rich Text, .html for HTML). The file extension tells your computer what program to open the file with. If you do not have the file extension at the end, you may not be able to open it.

8. Click  to continue.

Generate File in Location and Format Selected



9. Click **Generate** to create the file in the location and format selected. In this example the file was named "example.xls" and saved on the desktop.

Result

You have completed the export process.