

AIS Document Viewer

Downloading Reports

Welcome to AIS Document Viewer online training. My name is Summer Issawi and our topic in this segment is saving reports as files. Document Viewer allows us to use the Download feature to save multiple pages or large amounts of information. We are going to be looking at the using the Download feature, import a text file into Excel. I have already accessed Document Viewer using Internet Explorer and we will look at an example ledger report we will download into Excel. XXLedger2 is our sample ledger file. I will look at the September 20th version of this report, which is indexed on the mail code. Therefore, I would have to know the mail code I am interested in. I am using 0101 and I see the green stripes so I know it is a text report. I need to download it to bring it into Excel. I will click Download Pages and then look at the options I have in this dialog box. I can download the entire report (All), which would be all of the mail codes for this ledger report. I can download this mail code only (current section), the current page or specific pages. The default format for downloading a text report is as text, like a .txt file. There are other formats available, like HTML or .pdf. Checking the box to compress into zip archive format didn't work well when I imported this file into Excel as the text characters weren't standardized. So I will uncheck that box. If you won't be importing this report into Excel then keeping that box checked would be nice so that that file stays zipped (compressed to save space). Once I have made my selection I can click on the Create icon and you will be prompted to either Save or Open. Make sure you save your report and choose where you would like that text file to go (the Save As dialog box will pop up). You should also rename the file so that it is meaningful to you. After you Save, the download will run and you can click Close from there. Remember that the dialog box for downloading has an All Pages option, which would be huge if you were to download. Remember to save rather than open and choose a location and meaningful name, as well. That basic file will open in Notepad if you'd like to view it. Once you have downloaded a report as a text file, you can use the Text Import Wizard in Excel to bring that into Excel. Once you've opened Excel, go to File, Open, in Excel (2003 and 2010 version). For Excel 2007, click the Office Button and then Open and find that file you have just downloaded. If you don't see your file, make sure for Files Of Type, that you have All Files selected, so that the text file shows up. I will choose my file and then click Open (or double click to open that file). Step 1 determines the data type of your report. Excel is correct in what has been determined so I will click Next at the bottom right of that dialog box. Step 2 lets you set column breaks or field widths. Some column breaks have already been added. Click to insert column breaks, double click to delete column breaks, and click and drag to move column breaks. Mail Code is the first four numbers so I can click on the desired position to set a column break there. I can set a column break after the account number by clicking on the data itself or on the ruler above. Scroll over to see the rest of the file, so I can delete a break line by double clicking it or dragging it off the area. Make sure you leave enough room for all of the data in the column and line breaks are where you want them. Click Next. On step 3, you can choose the format for each column and the default is general. You can choose text, date, or skip columns. I can also leave most of the columns the way they are and still change them in Excel. However, for mail codes, there is a leading zero and I can leave it or set it as text. I click on Finish and the data pops into the report. From here, I can highlight all of the columns and click the divider line between two columns and it will auto fit all of the columns. What about downloading image reports? Here is an example of an image report. Fund Ledger (XX Ledger) has different account numbers and I can choose any one. This account has one page. I can click the Download Pages

button and I get the same options like All, Current Section, or Current Page. Remember All would be every account number resulting in a huge report. Below there are options (JPG, BMP, PNG, PDF) while Compress to Zip is also a default option and can't be unchecked in an image report. If you have a printing problem, you can download the report in a .pdf format and then print from there. You do not need Adobe Acrobat to be able to do this, but the Reader will allow you to view it. I can click create from that dialog box and then Save. Again, I get options for the location and the zip extension gets added automatically. Once the download has finished I can open that file. I have chosen to download this image report as a JPG (image file) so I can click that icon to open the image report in that format. I can also try another download for a PDF file. I will redo all of those same steps, instead choosing PDF as my format for downloading, this time. Thumbnails are also present for each page of the report. If you need to save the image report, use .pdf to get options for printing, distributing, zooming in/out, finding text, etc. I can close out of those reports. We do not recommend the use of any buttons from Internet Explorer. You would not want to email these reports out either, as this information is confidential and sensitive. Please remember to use the features provided to you on the toolbar in AIS Document Viewer rather than even the Back and Forward buttons on the Internet Explorer toolbar. When done using Document Viewer, remember to close from the file menu in Document Viewer or click X in the upper right hand corner to close the browser window. Also, remember where to go for help. The AIS Help Desk is available at 884-3000 or email ais311@msu.edu. Business hours are from 7:45-5:00 Monday – Friday. Thank you for joining me today for this Downloading Reports tutorial.