

Methods for Exporting Data to Excel

Before Starting: Set your default preferences for exporting data and reports.

1. Go to the {Tools} menu and choose "Preferences".
2. Click on the [Results Options...] button.
3. "Save Column Headings" should be checked, the Field separator should be "<Tab>", the Record separator should be "<CR><LF>", and the End of File separator should be "<None>". Click on [OK].
4. Click on the [Export Options...] button.
5. For Application, choose "Microsoft Excel". For Execute command line, click on the ellipses and navigate to the location of your Excel program. It is often found in a location like: "C:\Program Files\Microsoft Office\OFFICE11". Service name should be "Excel". Commands should be "DDE" and "[Paste()]". Click on [OK].
6. If you needed to make any changes, click on [OK], then go to the {File} menu and choose "Save". Otherwise, click on [Cancel] and don't save the model.

Method #1: Copy and Paste (also known as the Quick and Dirty method)

This method is great for getting ad hoc results into Excel quickly. You will lose any leading zeros. Since you are exporting from a results set, you just get the raw data, and not any calculated columns or subtotals from the report. If you have a huge results set, you may not have enough memory to attempt this method.

1. Generate a results set.
2. Select all of the data by going to the {Edit} menu and choosing "Select All" or by clicking in the upper left corner of the results set where the row count appears, or by using the standard windows keyboard shortcut of Ctrl+a (while holding down the [Ctrl] key, press the [a] key and release).
3. Go to the {Edit} menu and click on "Copy," or click on the "Copy" toolbar button, or use the standard windows keyboard shortcut of Ctrl+c.
4. Minimize BI Query.
5. Open Microsoft Excel.
6. Go to the {Edit} menu and click on "Paste," or click on the "Paste" toolbar button, or use the standard windows keyboard shortcut of Ctrl+v.

Note: If any of your data had leading zeros, they were dropped. For most data, this shouldn't be an issue. If you know which column in Excel (A, B, C, D, ...) will be containing leading zeros, before you paste the results set into Excel, you can select that column by clicking on the Column Header and go up to the {Format} menu and choose "Cells...". Make sure you are on the

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"Number" tab, and then select "Text" from the Category box and click on [OK]. Or you can change the display format after you paste the data into Excel. Select the column, {Format} "Cells" and choose "Custom" and set the format to display as 000000 or however many characters wide the data must contain.

Method #2: Saving Results to a File

This method gives you more control over the formatting of the data as you bring it into the spreadsheet. Since you are exporting from a results set, you just get the raw data, and not any calculated columns or subtotals from a report. It should be able to handle any size results set, up to Excel's maximum 65,536 rows (remember to allow one row for the column headings).

1. Generate a results set.
2. From the {Results} menu, choose "Save As..." and beneath that choose "Results...". Specify a file name and location, and click on [OK].
3. Minimize BI Query.
4. Open Microsoft Excel.
5. From the {File} menu, select "Open". At the bottom of the dialog box, be sure to change "Files of Type..." to "All Files". Navigate to the results file you just saved, highlight it (make sure that you select the *.qrd file, not the *.qrr file), and click on [Open].
6. Walk through the File Import Wizard, accepting the defaults, until step 3. There, select each attribute that has leading zeros and change the "Column Data Format" to "Text". Then click on [Finish].

Method #3: Saving a Report to a File

This method also gives you control over the formatting of the data you are bringing into the spreadsheet. Since you are exporting from a report, you lose any hidden columns, but you do get the values from any calculated columns or subtotals that were in the report. The formulas and borders are not exported. It also should be able to handle any size results set, up to Excel's maximum 65,536 rows (remember to allow one row for the column headings).

1. Generate a formatted report.
2. From the {Report} menu, select "Export Report". Specify a file name and location, and click on [OK].
3. Minimize BI/Query.
4. Open Microsoft Excel.

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5. From the {File} menu, select "Open". At the bottom of the dialog box, be sure to change "Files of Type..." to "All Files". Navigate to the report file you just saved (it will have a .txt extension), highlight it, and click on [Open].

6. Walk through the File Import Wizard, accepting the defaults, until step 3. There, select each attribute that has leading zeros and change the "Column Data Format" to "Text". Then click on [Finish].

Note: Any embedded carriage returns in the column headings or the data will cause Excel to start a new row. If you encounter this, you might want to go back to the report in BI Query and edit it to remove any embedded carriage returns you can before exporting the report.

Method #4: Exporting data from a button

This is the fastest, most automated method for getting results into Excel quickly. You will lose any leading zeros. Since you are exporting from a results set, you just get the raw data, and not any calculated columns or subtotals from the report.

1. Go to the User Queries window and from the {Tools} menu, select "Design Mode", or click on the "Design Mode" toolbar button.

2. Right-click on the window where you want the button to initially appear. From the shortcut menu, select "Create button...".

3. Click on the "Edit Text" button and then give the button a name, and format the display of the button. The left color button lets you specify the text color and the right color button chooses the background color. Click on [OK] in the Edit Text dialog box when done.

4. From the drop-down list in the "Link to" section, select the query you want the button to run.

5. In the "Output to" section, choose "Application".

6. Click on [OK] in the Create Button dialog box when done.

7. Exit Design Mode by going to the {Tools} menu, and selecting "Design Mode", or click on the "Design Mode" toolbar button

8. Go to the {File} menu and choose "Save" to save your button.

9. Click on the button, and watch it run the query and automatically export the results to Excel.