Downloading Data

The **Financial Summary Trends** page gives you multiple ways to download data:
1. the Quick Download function which is accessible at the top of the page, and
2. the standard download function which is accessible from the **Download** icon in the upper right corner of the **Toolbar**.

Using the Quick Download Function

Once you have made your filter selections and the page has loaded your data, the **Quick Download** function allows you to quickly download a specific section of the active report tab as a comma-separated values (.CSV) data file by simply selecting that section from the **Quick Download** menu and clicking the **Download Section** button.

NOTE: You must first select filters and wait for the report tabs to load before you can use this function. Options available in the **Quick Download** menu are determined by the report tab you select.

Step	Task
1.	Click the specific report tab to generate the report you want to download after making your selections on the **Filter Menu**.
2.	From the **Quick Download** menu, select the option for your download. **NOTE:** The **Download Crosstab** pop-up window appears stating that the crosstab has been generated and asking if you want to download or cancel. The **Download Crosstab** pop-up window typically appears at the bottom of the screen, so be sure to scroll down the page until you see the entire window.
3.	Click **Download**. **NOTE:** The file is saved in the designated location based on the settings of your browser and/or computer operating system. For example, if your browser is set to save all downloads to your **Downloads** folder, the file will be saved there when you select **Save File** and click **OK**. If your browser settings ask you where you want to save files, you will be asked where you want to save this file when you select **Save File** and click **OK**. Follow the steps to download the file based on your browser settings.
4.	To download additional sections of the active report page, repeat this process starting from step 3.
5.	To conduct a completely new download with different filter settings, repeat all steps.

Using the Standard Download Function

The standard download function gives you to several ways to download the active report, including image, PDF, PowerPoint, crosstab or data files. <u>It is not recommended to use the Image or PowerPoint options, so those are not covered in this job aid</u>. The **PDF** option provides static captures of the data from your selected report tab and can be used for presentations, meetings, or to update your leaders and staff about the financial health of the Unit. The **Crosstab** option is essentially the same as the **Quick Download** option, so it is not covered again here. The **Data** option provides unformatted, raw data results in .CSV format that can be opened in Microsoft Excel and used to conduct calculations from the extracted data.

NOTE: You must first select filters and wait for the report tabs to load before you can use this function. After clicking the **Download** icon, the **Download** pop-up window appears at the bottom of the screen. Be sure to scroll down until you see the entire **Download** window.

Data Download Option

Scenario: Download the data from the Account Type Detail, FOP Balances or Transactions report tabs to a .CSV file to open in Microsoft Excel.

NOTE: The **Data Download** option provides an unformatted .CSV file output that can be opened in or saved as a Microsoft Excel compatible workbook. Within this download window, you can choose the **Summary** data tab which provides brief totals from the filters you selected, or you can choose the **Full Data** tab, which provides detailed records and itemized data points for the filters you selected. The **Full Data** option can be very lengthy and may take some time to populate and download to your selected file output. Again, this download option is recommended for **Account Type Detail, FOP Balances** or **Transactions** report tabs. This is not recommended for the **Financial Summary** or **Graphs** tabs.

Step	Task
1.	From the **Financial Summary** tab, use the **Filter Menu** to select the information you want to appear in the report.
2.	Click the specific report tab to generate the report you want to download.
3.	Click any cell in the section you want to download. **NOTE:** The cell should turn blue.
4.	Next, deselect the highlighted cell by clicking once on that same cell. **NOTE:** Do not click on anything else in the report tab.
5.	Click the **Download** icon in the Toolbar. **NOTE:** The resulting pop-up window may appear in the middle or at the bottom of the page. Be sure to scroll down the page until you see the pop-up after clicking **Download**.
6.	In the **Download** pop-up window, click the **Data** option. **NOTE:** A new browser window will open showing a **Summary** tab and a **Full Data** tab. The **Summary** tab is the default view and provides a short summary of the data you selected to download. The **Full Data** tab provides all the data that makes up the section you've chosen. While the **Full Data** tab will only show the first 200 rows of this data on the page, the downloaded .CSV file will include all data from the selected report tab. Since the **Full Data** option can be very lengthy and may take some time to populate and download to your selected file output, it is recommended only for **Account Type Detail, FOP Balances** or **Transactions** report tabs. <u>This option is not recommended for the **Financial Summary** or **Graphs** tabs</u>.

7.	After selecting either the **Summary** or **Full Data** option, click the **Download all rows as a text file** link to download your data. **NOTE:** The file is saved in the designated location based on the settings of your browser and/or computer operating system. For example, if your browser is set to save all downloads to your **Downloads** folder, the file will be saved there when you select **Save File** and click **OK**. If your browser settings ask you where you want to save files, you will be asked where you want to save this file when you select **Save File** and click **OK**. Follow the steps to download the file based on your browser settings.
8.	To return to the dashboard, click the **X** in the upper right corner of the download window.
9.	To complete another download, repeat all steps.

PDF Download Option

Scenario: Download a static PDF of the Financial Summary page or Graphs tab.

The **PDF download** option creates a PDF document containing static images of the selected report. This option is recommended if you want to capture a PDF of the Financial Summary Page. This option is NOT recommended for use with the Account Type Detail, FOP Balances or Transactions tabs, as the resulting PDF will either not contain the full content of the report or it will not be formatted properly.

NOTE: When using the standard download functions, the **Financial Summary Trends** tool uses the following terms:

- Dashboard: refers to the window or report tab
- Sheet: refers to a section or sub-heading within a report tab
- Workbook: refer to all the content within all report tabs.

Step	Task
1.	From the **Financial Summary** tab, use the **Filter Menu** to select the information you want to appear in the report.
2.	Click either the **Financial Summary OR Graph** report tab that you want to download.
3.	Click the **Download** icon in the toolbar.
4.	Click the **PDF** option from the **Download** window. **NOTE:** The **Downloads** window typically appears at the bottom of the screen, so be sure to scroll down the page until you see the entire window.
5.	From the **Include** section in the **Download PDF** window, select the content you want to download from the report tab. **NOTE:** Options presented for the PDF download include: • **This View option:** *Recommended for Financial Summary and Graphs tabs only*.

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To download only the information currently viewable in the interior scroll window of the active report tab, choose This View. This option works best for the downloading a PDF of the Financial Summary tab or the Graphs tabs. Since the Account Type Detail, FOP Balances and Transactions tabs tend to populate a larger amount of data that does not completely fit into the viewable window, using This View may not be the best option for those tabs unless you only need the information at the top of the view window.

Specific Sheets from This Dashboard option: Can be used for Account Type Detail, FOP Balance and Transactions tabs to include full report in PDF, but the resulting PDF will be not be formatted properly. Not recommended for Financial Summary or Graph tabs.

To download one or more specific sections of data from the active report tab, choose Specific Sheets from This Dashboard. This option breaks each report into sections (or sheets) according to the sub-headings within the report (such as Filters, Balance Forward, Account Type Details, etc.). This option allows you to choose one specific section, multiple sections, or all the sections from the active report tab. Some report tabs contain only one distinct sheet, whereas other report tabs contain multiple sheets. Each sheet selected in the download will begin on a new page in the PDF document. This is recommended if there is data in the report tab than can show on the viewable page, such as on the Account Type Detail, FOP Balances, and Transaction tab.

The output for the download will have at minimum of three sheets, including:

Filters (recommended)—This page provides a display of the filters you selected in the Filter Menu. It is a useful way to track which filters are applied to the data after you have downloaded it. It is recommended to include this section as part of the download.
Other data sheets—The other sheets available for downloading in this option depend on the report tab you are viewing at the time you click the Download icon. Click on each sheet you wish to include in the download.

Specific sheet from this workbook option: Recommended for downloads of one PDF containing only Financial Summary and/or Graphs tabs.

To download information from more than one report tab, choose Specific sheet from this workbook. This option operates similarly to This View in terms of what it produces, but it allows you to download multiple reports into a single PDF, including the reports you are not currently viewing. It is not recommended to use this option if your data exceeds the size of the window on the report tab. This is recommended if you want to download a single PDF with both graph tabs in it, or a PDF with one or both graph tabs and the Financial Summary tab. Click on the sheet(s) you wish to download.

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	NOTE: In the **Download PDF** window, you can also select other options including **Scaling**, **Paper Size**, or **Orientation**.
7.	When finished selecting options, click **Create PDF**. **NOTE:** The **Download PDF** window appears on the page stating that the PDF file has been generated and asking if you want to download or cancel.
8.	Click **Download**. **NOTE:** The resulting pop-up window may appear in the middle or at the bottom of the page. Be sure to scroll down the page until you see the pop-up after clicking **Download**. The file is saved in the designated folder based on the settings of your browser and/or computer operating system. For example, if your browser is set to save all downloads to your **Downloads** folder, the file will be saved there when you select **Save File** and click **OK**. If your browser settings ask you where you want to save files, you will be asked where you want to save this file when you select **Save File** and click **OK**. Follow the steps to download the file based on your browser settings.
9.	To complete another PDF download, repeat all steps.