

Export EPM Data to Microsoft Excel

The purpose of this job aid is to explain how to export data from EPM to Microsoft Excel.

Complete the steps below to export data from EPM to	Microsoft Excel:				
1) In EPM, access the Position Budget Forms data or the Departmental Budget Forms data you want to export.	Comments Supporting Detail Change History Attachments				
 Select Actions from the toolbar or right click in a cell. 	 Lock/Unlock Cells Analyze New Ad Hoc Grid 				
 Scroll down to the bottom of the menu and select Spreadsheet Export. 	Predictive Planning Business Rules Smart Push Details				
Options:	Grid Validation Messages				
If you are using Chrome :	Clear Formatting Spreadsheet Export				
• Select Export .	Open in Smart View				
• Select location and name file.	Spreadsheet				
• Save File.	Click on the export button for spreadsheet export Click on the export button for spreadsheet export Countie Restore Regenter				
If you are using Firefox and depending on how you want to export the data, select the appropriate option and then click OK :					
• Open with Microsoft Excel.	Sin Ne PC Normets Downess Sourcess				
• Save File.					
 If you selected "Open with Microsoft Excel", you may be presented with a message, "Do you want to open it anyway?" select "Yes" to proceed. 	• ender (Normfruksda) (20) • enderskade (20) • enderskade (20) • enderskade (20) • enderskade (20) • enderskade (20) • enderskade (20) • Hoterskade (20)				



Example of Excel File downloaded from EPM:

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А	В	С	D	E	F	G	н	1
	C200118							
	FY18	FY18	FY19		FY20	FY20	FY20	
	Actuals	Budget	Budget	Budget	Budget	Budget	Budget	Budget
	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	Sep	Sep
	Final	Post Final	Post Final	Working	Working	Working	Working	Working
	Load	Office Total	Office Total	Baseline Budget	Permanent Additions	Department Baseline	Department Working Total	3aselineIncDec:Increase (Decre
R1100 - Sponsored Programs - Budget Input								
1100 Sponsored Programs								
R1200 - Net Sales Services Education - Budget								
let Sales Services Education								
R1500 - Auxiliary Enterprise Net - Budget Inpu								
uxiliary_Enterprise_Net								
R1400 - Net Professional Fee - Budget Input								
let Professional Fee								
R1600 - Other Operating Revenue - Budget In								
Other Operating Revenue								
R1300 - Net Sales Services Hospitals - Budge								
Net Sales Services Hospitals								
Operating Revenue								
R2000 - State Appropriations - Budget Input								