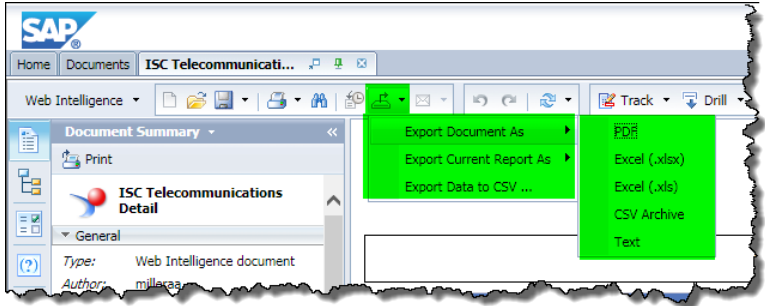
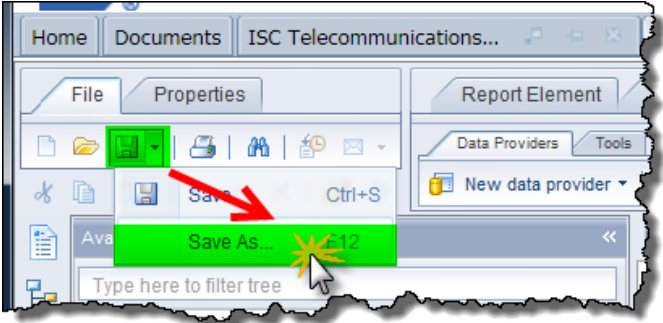


How to Save Documents / Reports as Excel, CSV, or PDF

There are several options if you would like to save a document or single report in that document as an Excel, CSV, or PDF file. The process depends on whether you have **HTML** or **Applet** selected in your **Preferences** for **Web Intelligence**.

- **Option #1 - HTML:** Click on the **Export** icon and make your selection from the drop-down.
- **Option #2 - Applet:** Click on **Save** icon, select **Save As**, make your choices.

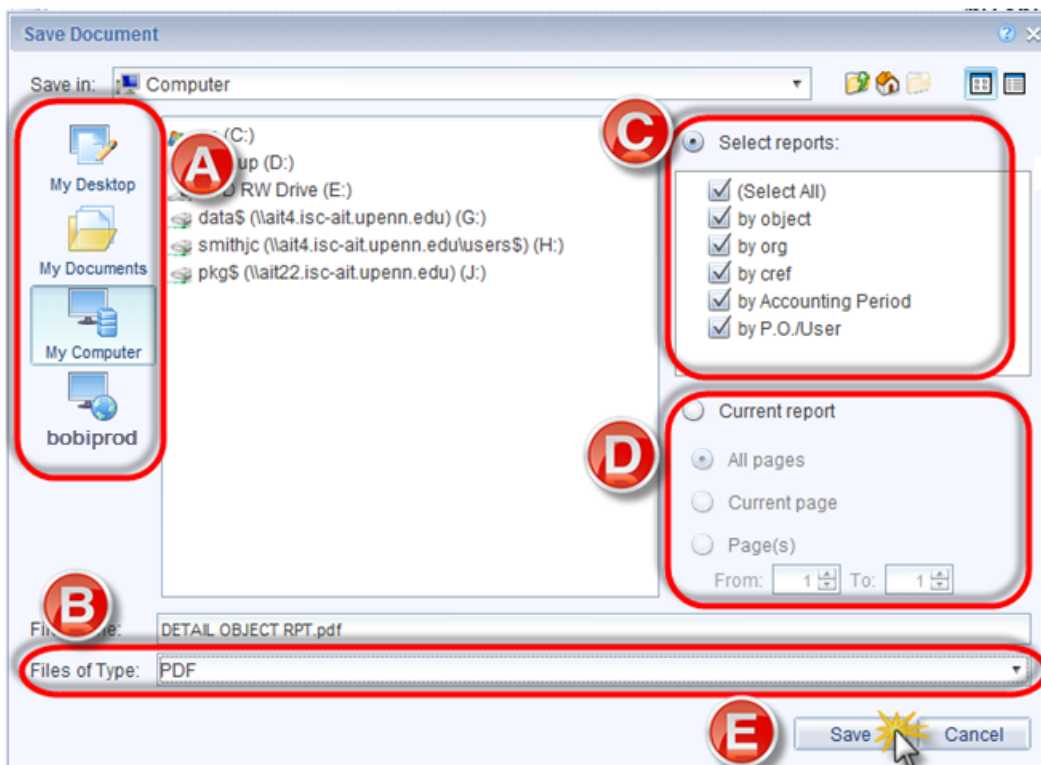
Step-by-Step Instructions	HINTS
<p>Open the document that you wish to save as Excel (.xls or .xlsx), CSV, or PDF.</p>	<p>Reports can be saved as Excel or PDF as long as they are saved to your computer. If you save within BI4 to My Favorites, the report must be saved in BI format.</p>
<p>OPTION #1 – HTML</p> <ul style="list-style-type: none"> • Click on Export icon • Select whether to export the entire document, a single report, or just the data to CSV. • Select your desired file format: PDF, Excel (.xlsx), Excel (.xls), CSV Archive, or Text • Decide whether you want to Save or just Open the file. (See Figures 3 & 4) 	 <p>NOTE: In the HTML interface, you can export raw data from the cube to a CSV file, as well as the data from the report, whereas a CSV Archive file is a ZIP file containing only the data in the document.</p>
<p>OPTION #2 - APPLET</p> <ul style="list-style-type: none"> • Click on the Save icon and select Save As from the drop-down menu 	 <p>The Save Document box displays. (Figures 1 & 2)</p>
<ul style="list-style-type: none"> • Select the location of where you want to save the document. (Figure 1, A) 	<p>Options are My Desktop, My Documents, and My Computer. (You could also save to BI4, but not as Excel.)</p>
<ul style="list-style-type: none"> • PDF Example: Select the PDF file type (Figure 1, B) and PDF options appear in the Save Document box. (Figure 1, C,D) 	<p>You can select whether you would like to save the entire document or only one specific report. Or you can select Current Report and only select certain pages.</p>

How to Save Documents / Reports as Excel, CSV, or PDF

<ul style="list-style-type: none"> • Excel Example: Select Excel file type (Figure 2, B) and Excel options appear in the Save Document box. 	<ul style="list-style-type: none"> • You can select whether you would like to save the entire document or only one specific report within the document. (Figure 2, C) • You can also decide whether you would like the layout and formatting of the document matched as closely as possible in the Excel file or whether ease of data processing is more important. (Figure 2, D) • TIP: To avoid merging multiple cells into Excel cells as much as possible and to exploit the data processing features of Excel, select Prioritize easy data processing in Excel.
<ul style="list-style-type: none"> • Click the Save button. (Figures 1 & 2, E) 	

PDF EXAMPLE

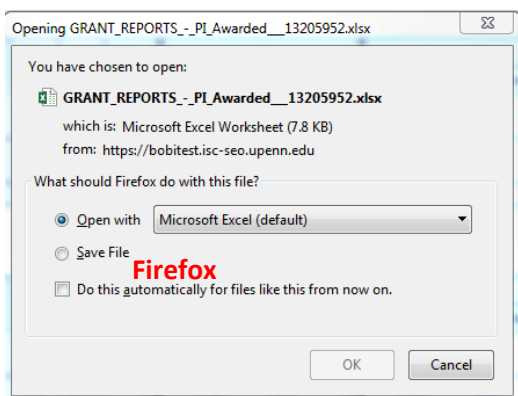
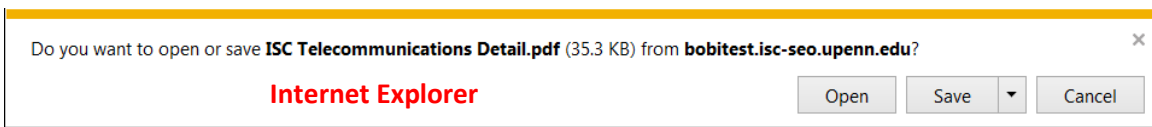
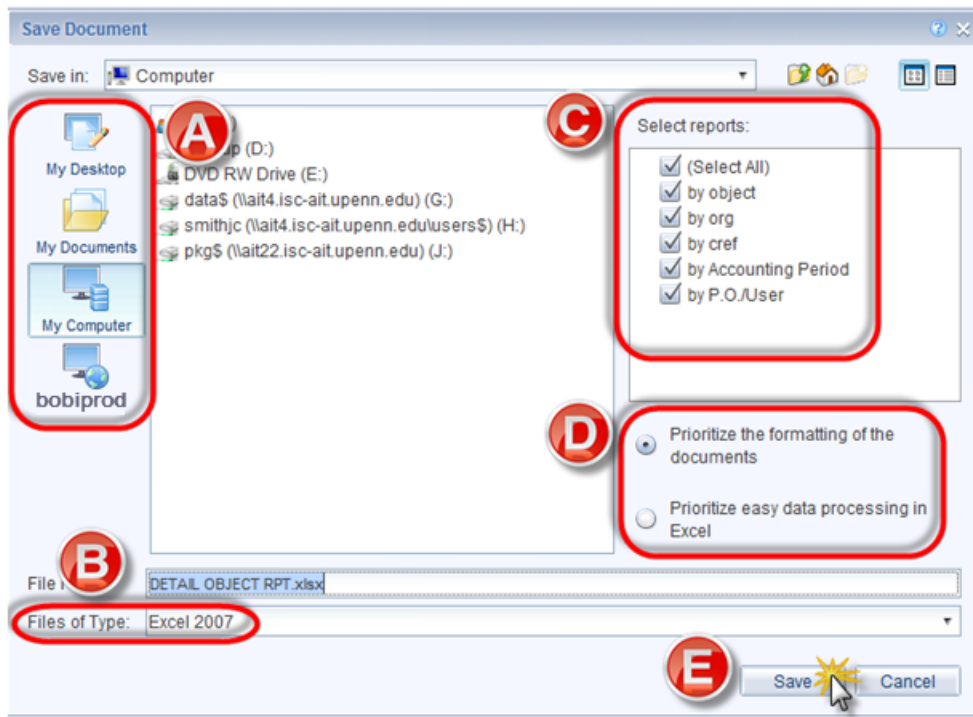
Figure 1: The **Save Document** dialog box: **A**-select location; **B**-select file type; **C**-select which reports; **D**-select pages; **E**-click **Save**.



How to Save Documents / Reports as Excel, CSV, or PDF

EXCEL EXAMPLE

Figure 2: The **Save Document** dialog box: **A**-select location; **B**-select file type (PDF in this example); **C**-select which reports; **D**-select pages; **E**-click **Save**.



Figures 3 & 4: These 2 screenshots show the visually different (but functionally the same) dialog boxes for IE and FF that display when opening or saving the Excel/PDF file to your computer.