

Utilizing the “Download to Excel” Feature

You can quickly and easily take returned information from PeopleSoft inquiries and download it into Excel. By simply clicking on the Download to Excel button found on several PeopleSoft Finance inquiries (ex: Budgets Overview), you can manipulate the data using the Excel functions.

Inquiry Results
Budget Overview

Business Unit: UND01
 Ledger Group: FNDDTL Fund Detail Budget
 Type of Calendar: Detail Accounting Period
 Amounts in Base Currency: USD
 Revenue Associated

[Return to Criteria](#) Max Rows: [Display Options](#)

Ledger Totals (95 Rows)

Budget:	403,954.00	Net Transfers:	0.00
Expense:	336,259.06		
Encumbrance:	0.00		
Pre-Encumbrance:	0.00		
Budget Balance:	67,694.94		
Associate Revenue:	0.00		
Available Budget:	67,694.94		

Download to Excel button

Budget Overview Results													Customize	Find	View	Print	First	1-95 of 95	Last
	Ledger Group	Account	Fund	Dept	Fiscal Year	Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available							
1	FNDDTL	511000	22290	3100	2008	1	290,674.00	11,291.67	0.00	0.00	279,382.33	96.12							
2	FNDDTL	511000	22290	3100	2008	2	0.00	22,583.34	0.00	0.00	-22,583.34	0.00							

When the Excel spreadsheet opens, all numeric values in the spreadsheet are formatted as text (e.g., instead of \$1000.00 being in a cell in the spreadsheet as 1000, it's in the cell as ="1000"). So, in order to use the values in the spreadsheet, they need to be converted to numbers.

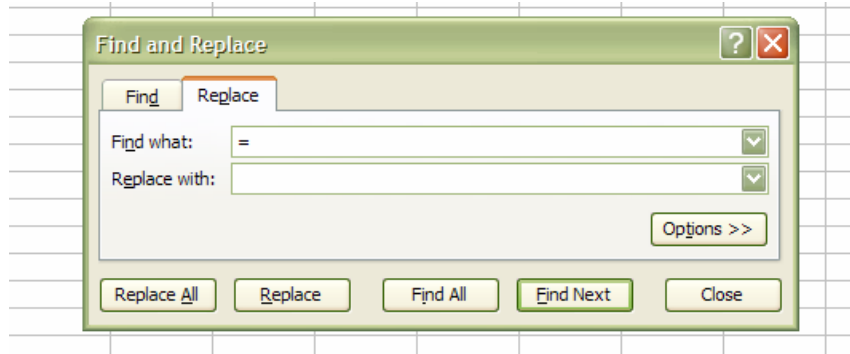
1. Highlight all cells with numbers in them.

Here's a helpful hint: by clicking in the far left corner, you can select the entire Excel worksheet.

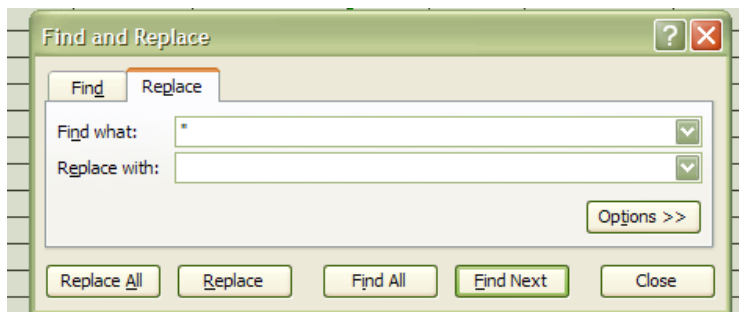
	A	B	C	D	E	F	G	H	I	J	K	L	M
1		Ledger Group	Account	Fund	Dept	Fiscal Year	Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available
2		FNDDTL	511000	0	3100	2008	1	290,67	11,291.	0.00	0.00	279,382.33	96.12
3		FNDDTL	511000	0	3100	2008	2	0.00	22,583.	0.00	0.00	-22,583.34	0
4		FNDDTL	511000	0	3100	2008	3	0.00	22,583.	0.00	0.00	-22,583.34	0
5		FNDDTL	511000	0	3100	2008	4	0.00	22,583.	0.00	0.00	-22,583.34	0
6		FNDDTL	511000	0	3100	2008	5	19,674.	22,583.	0.00	0.00	-42,257.34	214.79
7		FNDDTL	511000	0	3100	2008	6	0.00	22,583.	0.00	0.00	-22,583.34	0
8		FNDDTL	511000	0	3100	2008	7	0.00	22,583.	0.00	0.00	-22,583.34	0
9		FNDDTL	511000	0	3100	2008	8	0.00	22,583.	0.00	0.00	-22,583.34	0
10		FNDDTL	511000	0	3100	2008	9	0.00	22,583.	0.00	0.00	-22,583.34	0
11		FNDDTL	511000	0	3100	2008	10	0.00	22,583.	0.00	0.00	-22,583.34	0
12		FNDDTL	511000	0	3100	2008	11	0.00	22,583.	0.00	0.00	-22,583.34	0
13		FNDDTL	511000	0	3100	2008	12	0.00	11,291.	0.00	0.00	-11,291.67	0
14		FNDDTL	512000	0	3100	2008	1	9,237.0	729.50	0.00	0.00	8,507.50	92.1
15		FNDDTL	512000	0	3100	2008	2	0.00	1,999.7	0.00	0.00	-1,999.75	0
16		FNDDTL	512000	0	3100	2008	3	0.00	1,318.5	0.00	0.00	-1,318.50	0

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2. Using the Find/Replace function in Excel (Ctrl F), replace all = (equal signs) with blank (leave blank).



3. While all cells are still highlighted, use the find/replace function in Excel to replace all " (quotes) with blank (leave blank).



Following these steps will replace the text value with a numeric value allowing full functionality of Excel calculations.

Please note: It is important that you replace the equal signs *first*, then the quotes.