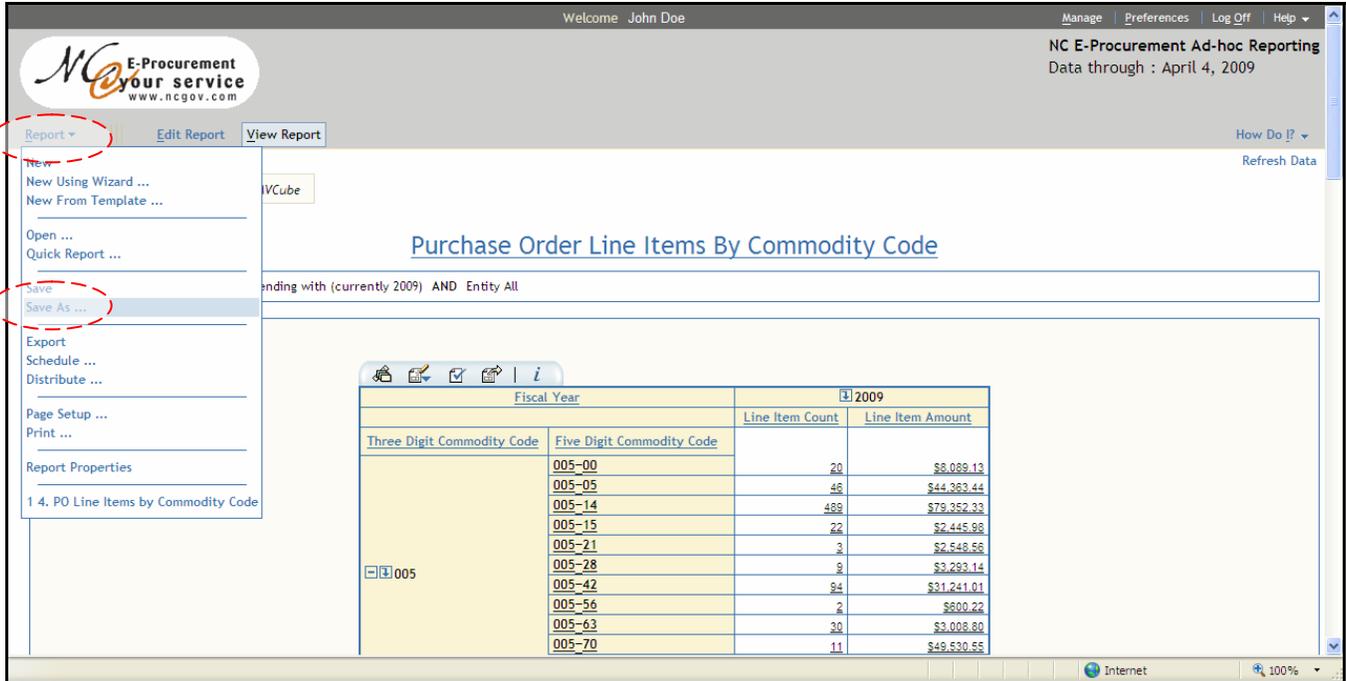


Saving and Exporting a Summary Report Job Aid

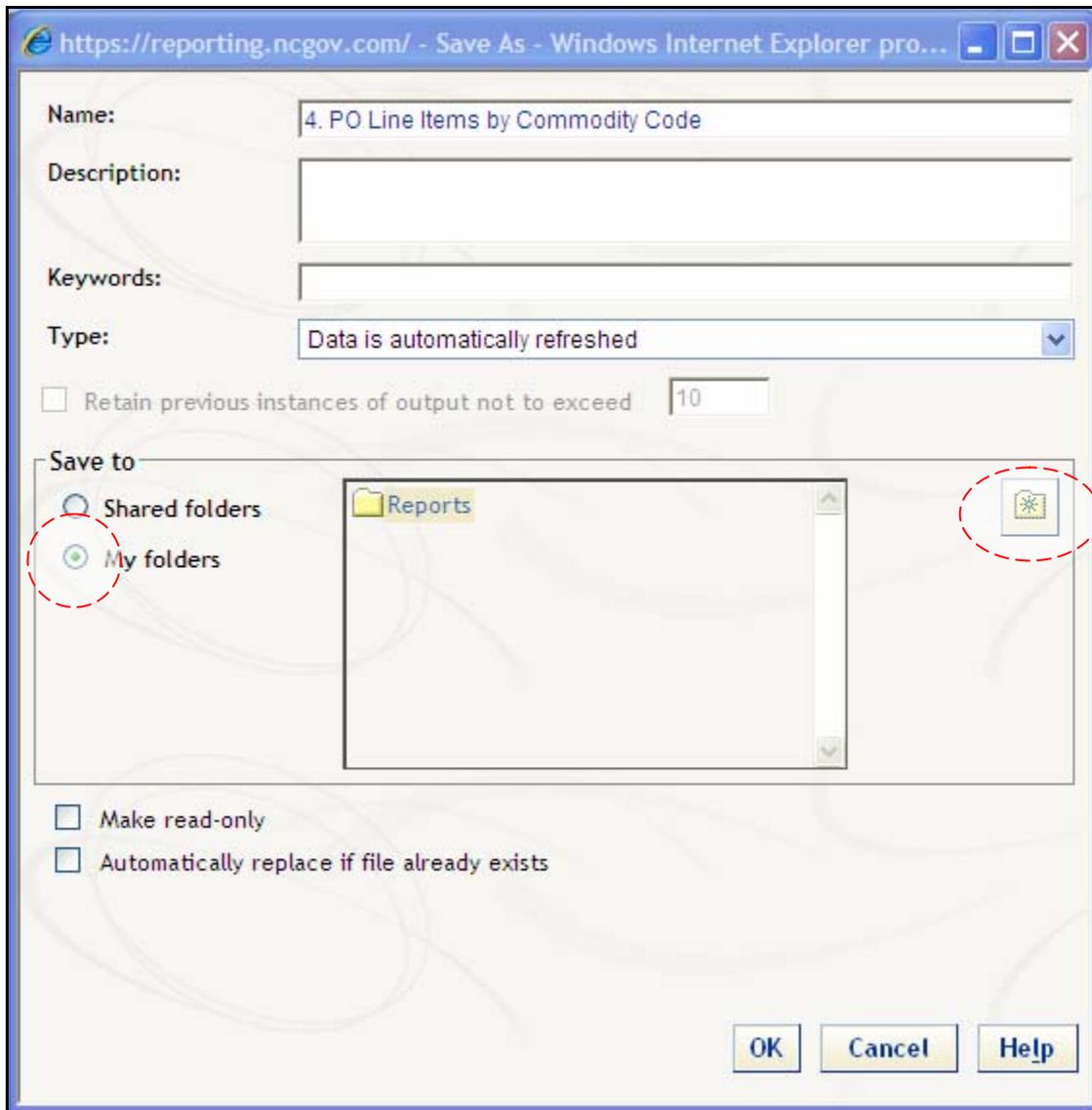
The NC E-Procurement Ad-hoc Reporting Application contains the functionality to save and/or export any report that is generated by the system. The subsequent set of steps can be followed to save and export any of the seven available Summary reports.



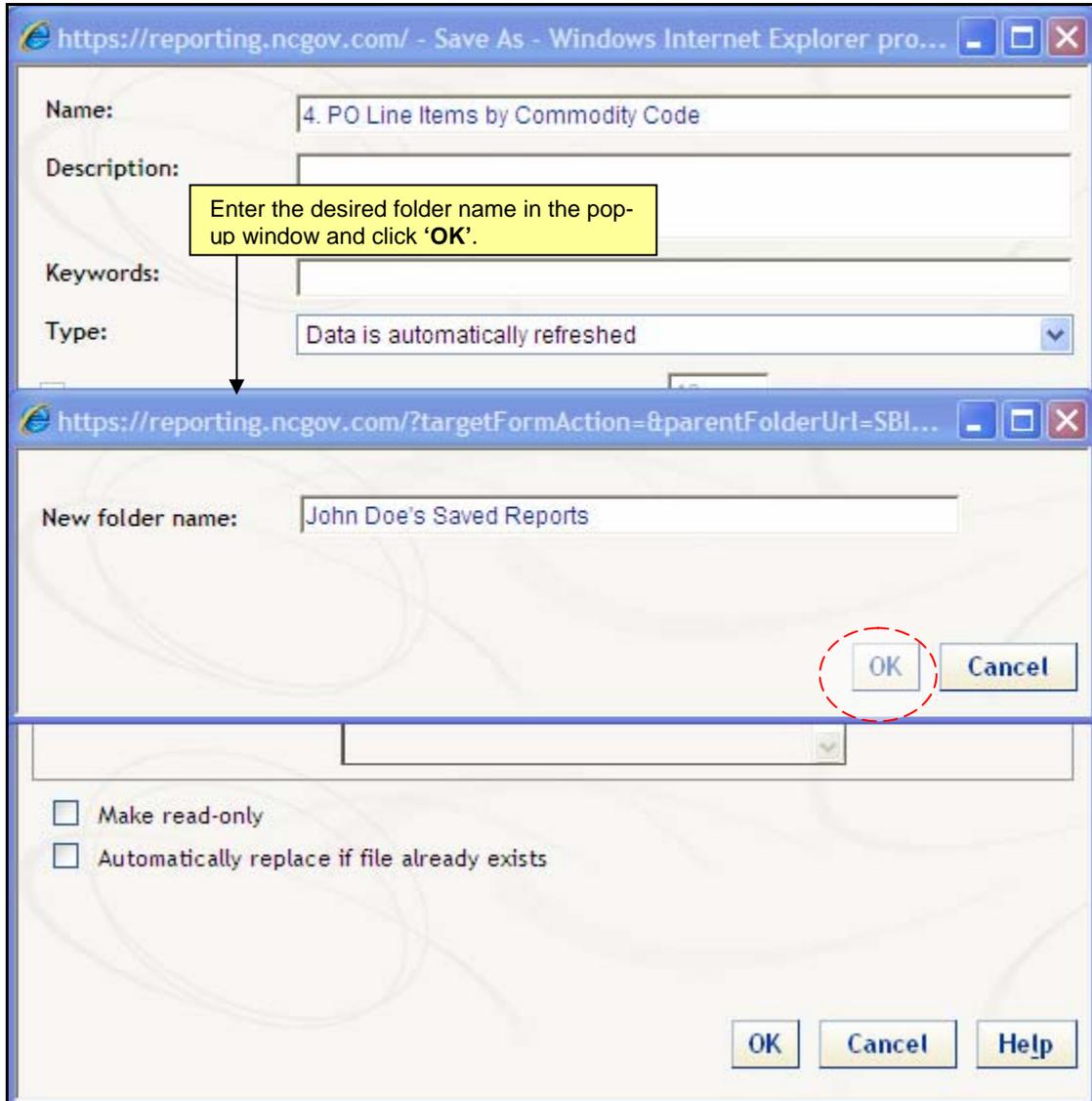
The screenshot shows the application interface with the 'Report' menu open. The 'Save As...' option is highlighted. The main content area displays a report titled 'Purchase Order Line Items By Commodity Code' for the fiscal year 2009. The report data is as follows:

Fiscal Year		2009	
Three Digit Commodity Code	Five Digit Commodity Code	Line Item Count	Line Item Amount
005	005-00	20	\$5,089.13
	005-05	46	\$44,363.44
	005-14	489	\$79,352.33
	005-15	22	\$2,445.98
	005-21	3	\$2,548.56
	005-28	9	\$3,293.14
	005-42	94	\$31,241.01
	005-56	2	\$600.22
	005-63	30	\$3,008.80
	005-70	11	\$49,530.55

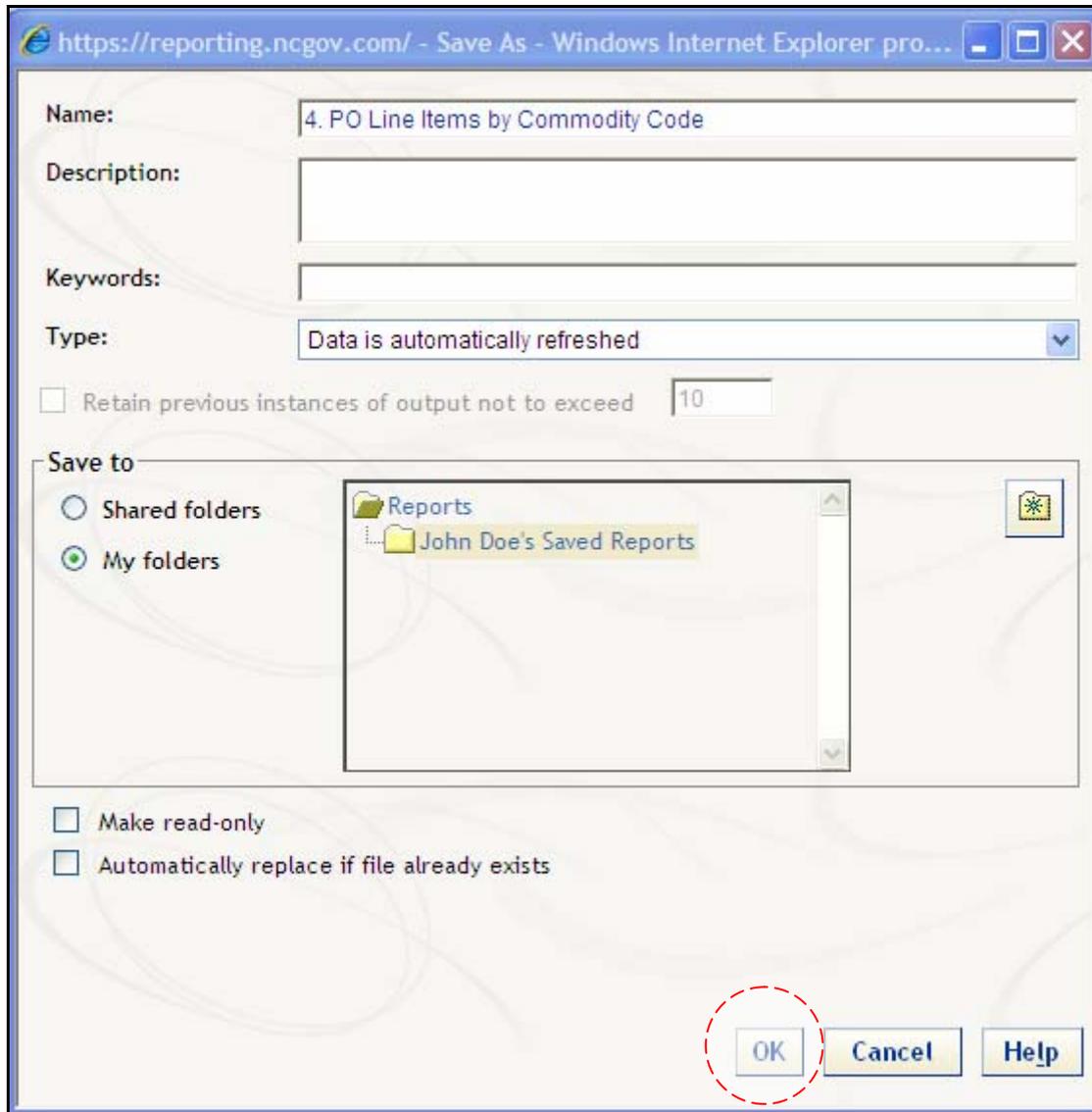
1. Once the report has been filtered to display the appropriate data, it can be saved by clicking on the **'Report'** link on the top left-hand side of the page.
2. Click the **'Save As'** option in the drop-down box.



3. Click the **'My folders'** radio button.
4. Select an existing folder or create a new one by clicking the **'Create new folder'** icon.



5. Enter the appropriate folder name and click 'OK'.



6. Click 'OK' to save the report.
7. The Summary report is displayed.

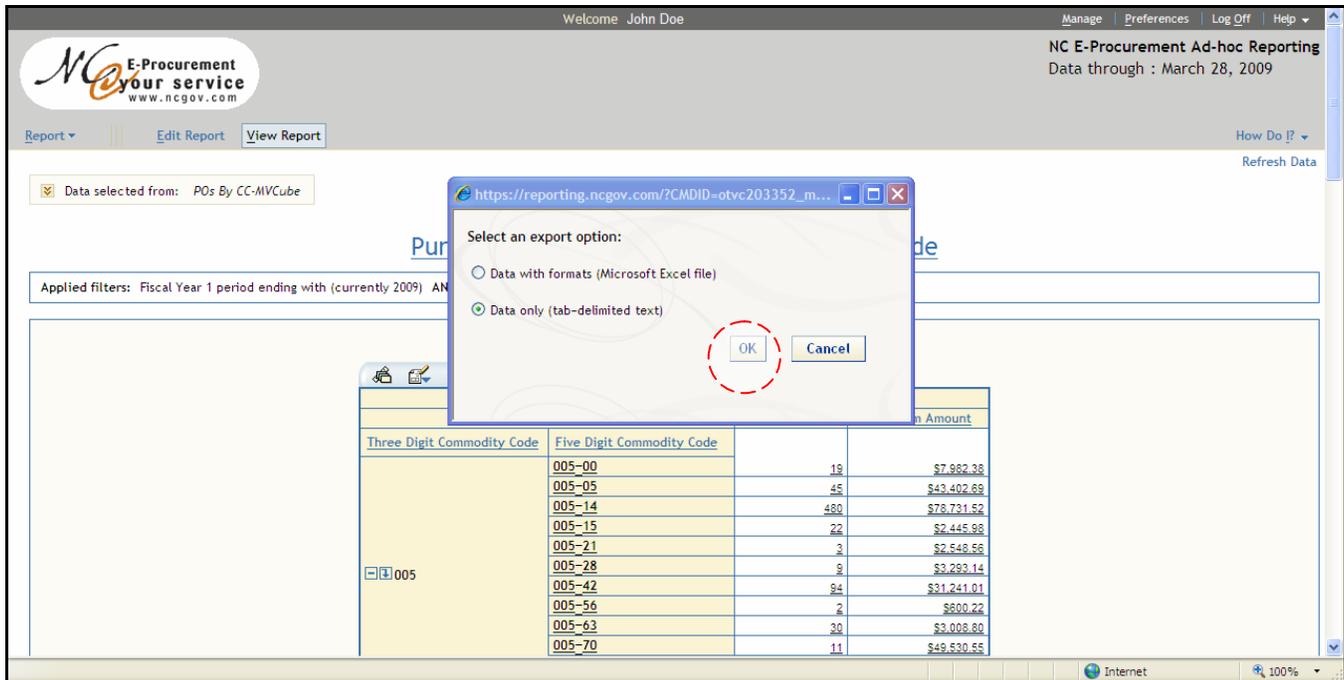
Note: To access the saved report, click the 'Report' link on the top left-hand corner of the page and select the 'Open' option. Select the 'My folders' radio button at the top of the report selection window. The user's personal folders will be displayed. Open the appropriate folder to find the saved report.

Applied filters: Fiscal Year 1 period ending with (currently 2009) AND Entity All

Three Digit Commodity Code	Five Digit Commodity Code	Line Item Count	Line Item Amount
005	005-00	19	\$7,982.38
	005-05	45	\$42,402.69
	005-14	480	\$78,731.52
	005-15	22	\$2,445.98
	005-21	3	\$2,548.58
	005-28	9	\$3,293.14
	005-42	94	\$31,241.01
	005-56	2	\$600.22
	005-63	30	\$3,008.80
	005-70	11	\$49,530.55

8. In order to export a Summary report, first hold down the 'ctrl' key on the keyboard.
9. Click on the 4th icon, 'Export table' (still holding down the 'ctrl' key).

Note: The 'ctrl' key must remain held down during steps 8-13 in order for the export to function correctly.

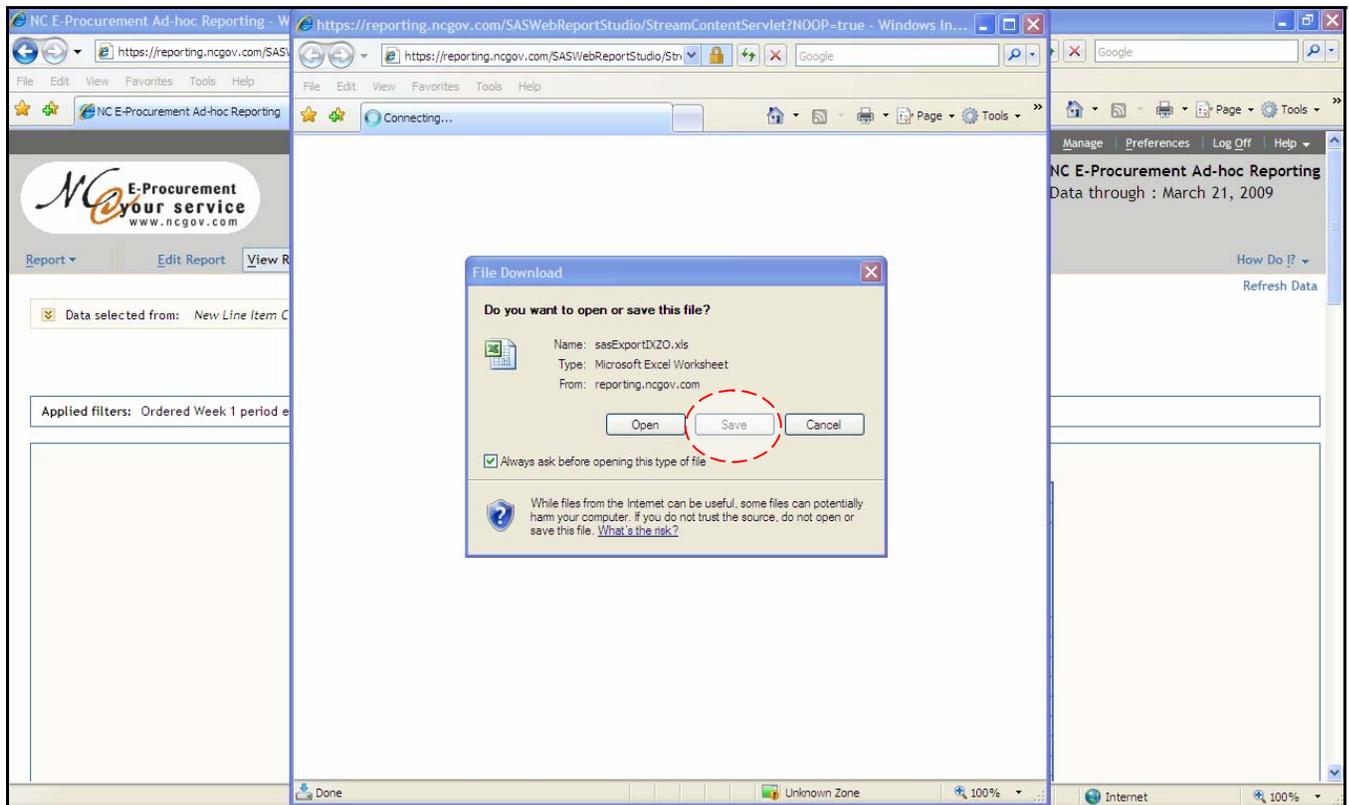


10. A pop-up window appears, displaying the available export options. Select the 2nd radio button, '**Data only (tab-delimited text)**'.

Note: The '**Data with formats (Microsoft Excel file)**' option will export the report to Microsoft Excel, but maintain its current format (the way the report is presented in the SAS Application). The '**Data only (tab-delimited text)**' format will export the report to Microsoft Excel in a tab-delimited format. It is strongly recommended to export reports using the '**Data only (tab-delimited text)**' option if the report's data will need to be sorted or otherwise manipulated in Microsoft Excel.

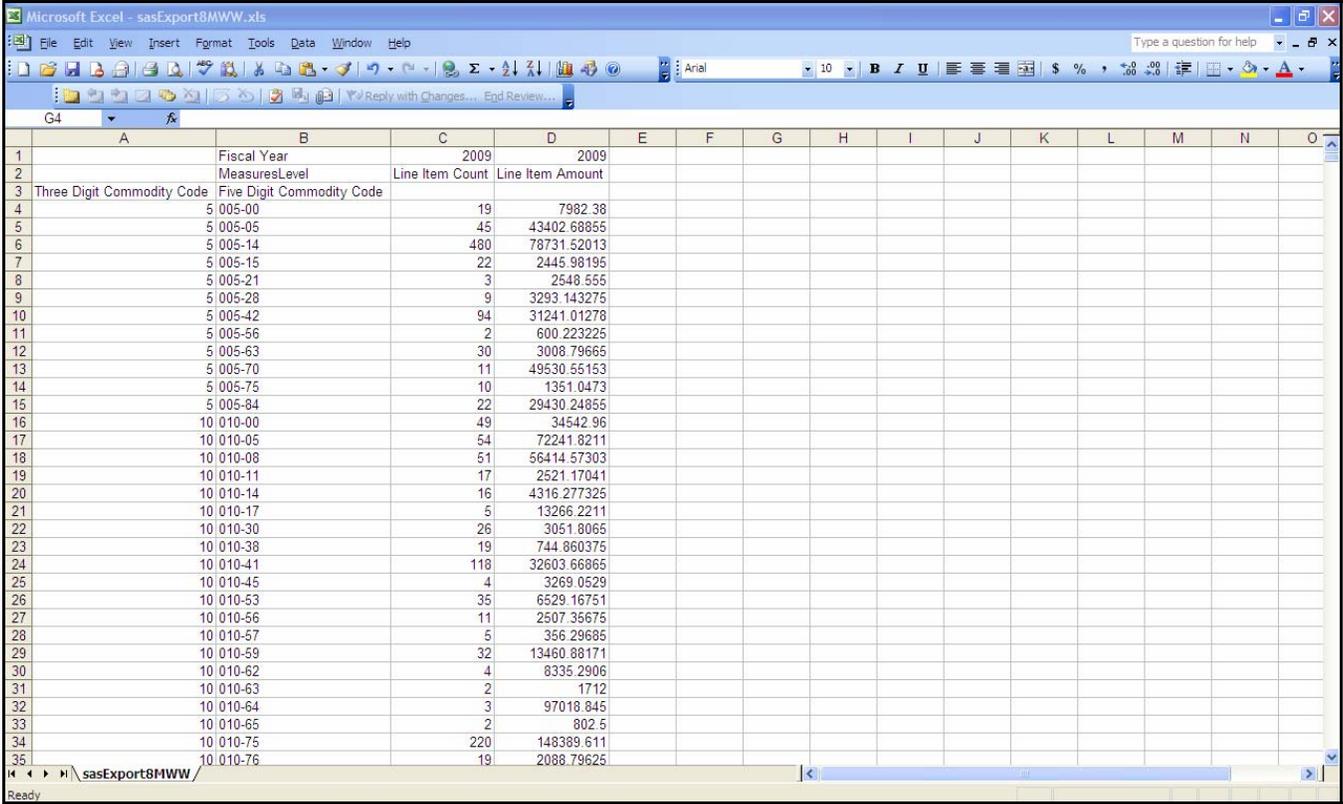
11. Click '**OK**' on the pop-up window (still holding down the '**ctrl**' key).

Note: The '**ctrl**' key must remain held down during steps 8-13 in order for the export to function correctly.



12. Click the **'Save'** button.
13. Release the **'ctrl'** key on the keyboard.
14. Enter a file name and save it to the appropriate location.
15. Find the report and open it.

Note: The exported report is now saved to the location that was selected and may be accessed at a later time.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1		Fiscal Year	2009	2009											
2		MeasuresLevel	Line Item Count	Line Item Amount											
3	Three Digit Commodity Code	Five Digit Commodity Code													
4		5 005-00	19	7982.38											
5		5 005-05	45	43402.68855											
6		5 005-14	480	78731.52013											
7		5 005-15	22	2445.98195											
8		5 005-21	3	2548.555											
9		5 005-28	9	3293.143275											
10		5 005-42	94	31241.01278											
11		5 005-56	2	600.223225											
12		5 005-63	30	3008.79665											
13		5 005-70	11	49530.55153											
14		5 005-75	10	1351.0473											
15		5 005-84	22	29430.24855											
16		10 010-00	49	34542.96											
17		10 010-05	54	72241.8211											
18		10 010-08	51	56414.57303											
19		10 010-11	17	2521.17041											
20		10 010-14	16	4316.277325											
21		10 010-17	5	13266.2211											
22		10 010-30	26	3051.8065											
23		10 010-38	19	744.860375											
24		10 010-41	118	32603.66865											
25		10 010-45	4	3269.0529											
26		10 010-53	35	6529.16751											
27		10 010-56	11	2507.35675											
28		10 010-57	5	356.29685											
29		10 010-59	32	13460.88171											
30		10 010-62	4	8335.2906											
31		10 010-63	2	1712											
32		10 010-64	3	97018.845											
33		10 010-65	2	802.5											
34		10 010-75	220	148389.611											
35		10 010-76	19	2088.79625											

16. The exported Summary report opens in Microsoft Excel.

Note: The data can be manipulated using normal Excel functions.