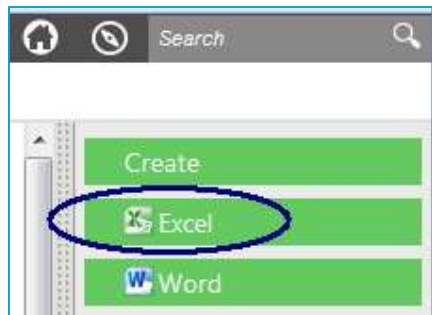# Exporting data to Microsoft Excel

Integration with Microsoft Excel allows you to connect on any Web platform data source (query page) and get and refresh multiple data grids while ensuring direct, fast and secured access. You can export data from a List page, View page, Edit page, and a grid to Microsoft Excel, as well as hyperlink from Excel to Sage X3.

Excel report

When exporting to Excel, you are given the option of using an existing template, creating a template, modifying a template, or using no template at all.


- Select the Choose existing template option to create the report using an Excel template.
    - Click the Selection icon at the Template field. The List of templates window appears, from which you can select a template.
    - Only those templates matching the criteria defined for the template are available for selection. For example, templates can be made available to only a specific company.
    - This is the only option that will extract data from the entity selected and prompt you to connect with a valid user ID and password.
- Select the Create template option to create a new template in Excel using the data from the entity (such as List).

Exporting data to Microsoft Excel (continued)

- You can save the document created as a template and upload it using the Sage tab in Excel.

  – Select the Edit template option to modify a template that was previously uploaded into Sage X3. The template to modify is selected at the Template field.

  – After accepting an option, you may be prompted to install the Sage X3 Excel Add-in if it is not already installed on your system.

  – Follow the prompts in the Sage X3 Excel Add-ins installation wizard.

Sage X3 ribbon - Excel

After the Sage X3 Office add-in is installed, the Sage tab appears in the ribbon for Microsoft Excel.
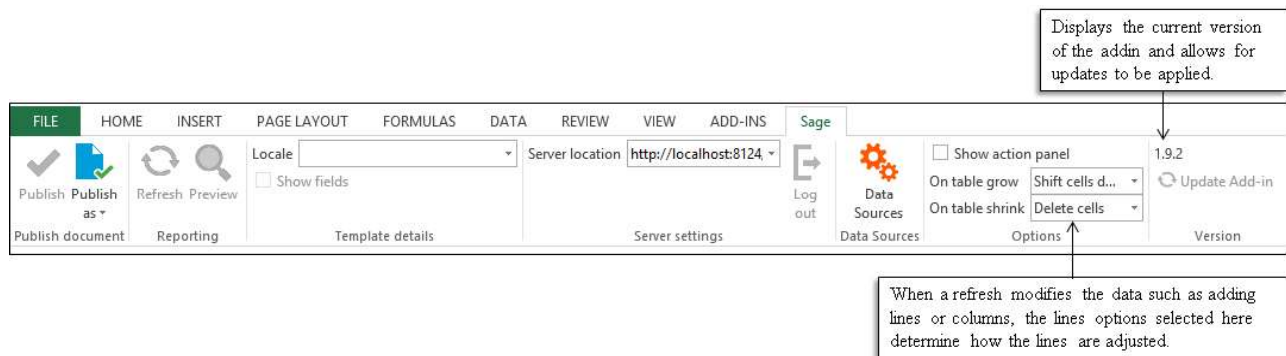

- Note: After installing Excel, you may need to click the Enable Editing button that displays below the ribbon.

- When exporting directly to Excel, the server settings and connection are automatically set based on your browser connection.

- When accessing Excel outside of Sage X3, you must define the server settings before connecting.

  – If you click Connect and a server setting is not defined, you are prompted for the server settings before getting the connection window.

  – The user ID and password entered are the same as those used when accessing Sage X3 and all security defined applies.

Exporting data to Microsoft Excel (continued)

Data sources

Click the Data sources button on the Sage ribbon to view, edit, or add additional data sources to the spreadsheet.
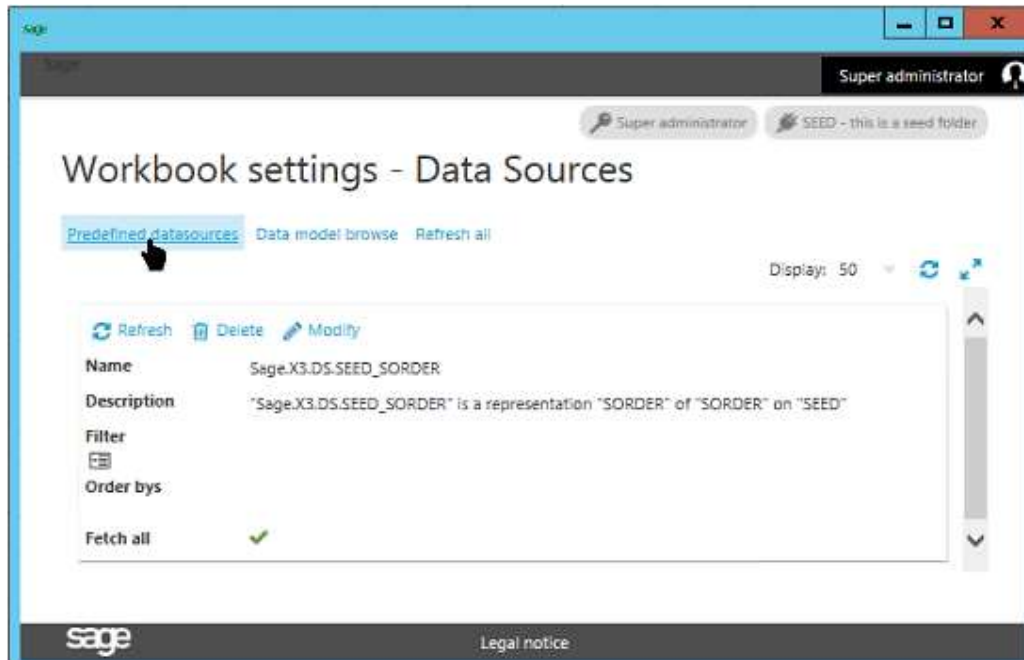
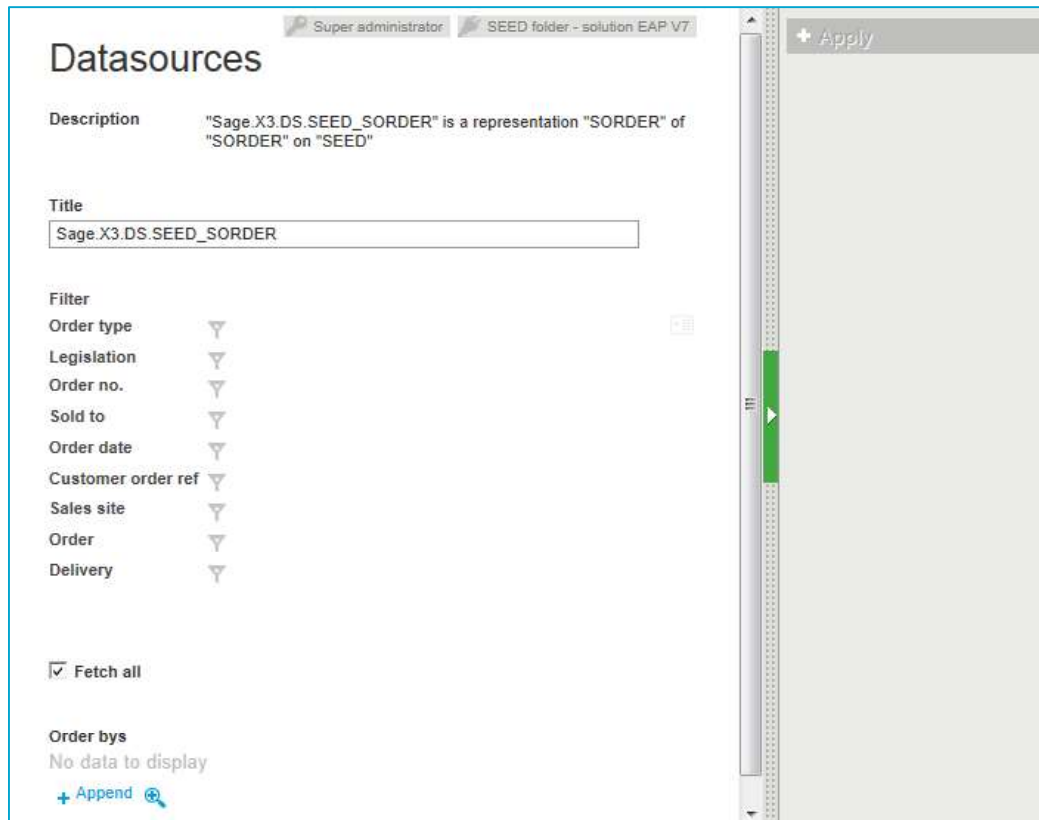- The window that appears displays any filters or sorts that are defined.

Editing the current data source

To define filter and sort information for the current data source, click the Actions icon in the Workbook settings window next to the Name field and then select Edit.
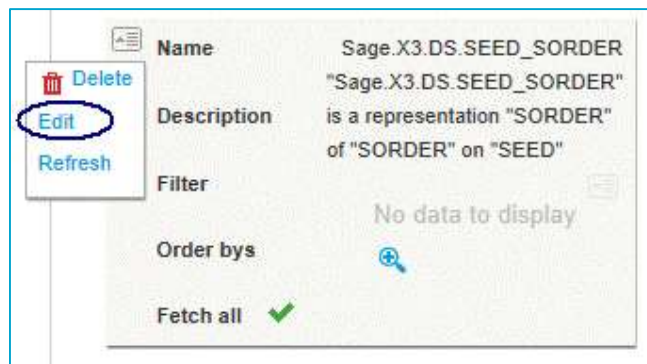
Exporting data to Microsoft Excel (continued)

The following window appears.

- You can define filter information for each of the columns in the spreadsheet.

  – By clicking the Filter icon next to the column description, you can select the operator and the values to define the filter.

- Clear the Fetch all check box to limit the number of records retrieved.

- In the Order bys section, you can define the extraction sorting order. You can select multiple columns from the data source before selecting the ascending or descending order option.

Exporting data to Microsoft Excel (continued)

Adding data from a pre-defined data source

In the Workbook settings window, select Predefined data sources. The following window appears
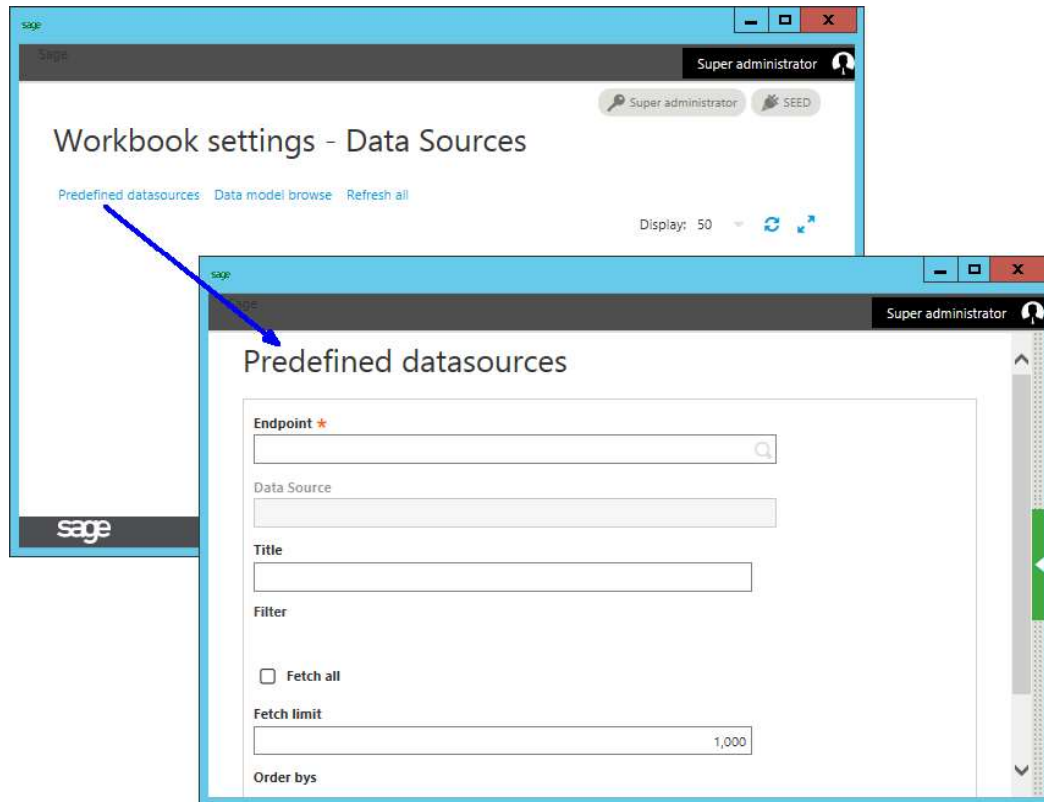
Exporting data to Microsoft Excel (continued)

- The first step is to select the endpoint and the menu item at the Datasource field.
  - You can either select an endpoint defined as a folder or the Sage X3 Web (Syracuse) administration endpoint for accessing administration data.
  - The data sources listed are based on menu items in Sage X3. For example, the BPs function.

- After defining the information, click Apply in the Right panel to apply the new rows/columns to the spreadsheet.

## Exporting data to Microsoft Excel (continued)

- The data from the data source selected is inserted at the current position of the cursor in the Excel spreadsheet. This can be on the same tab or a new tab.
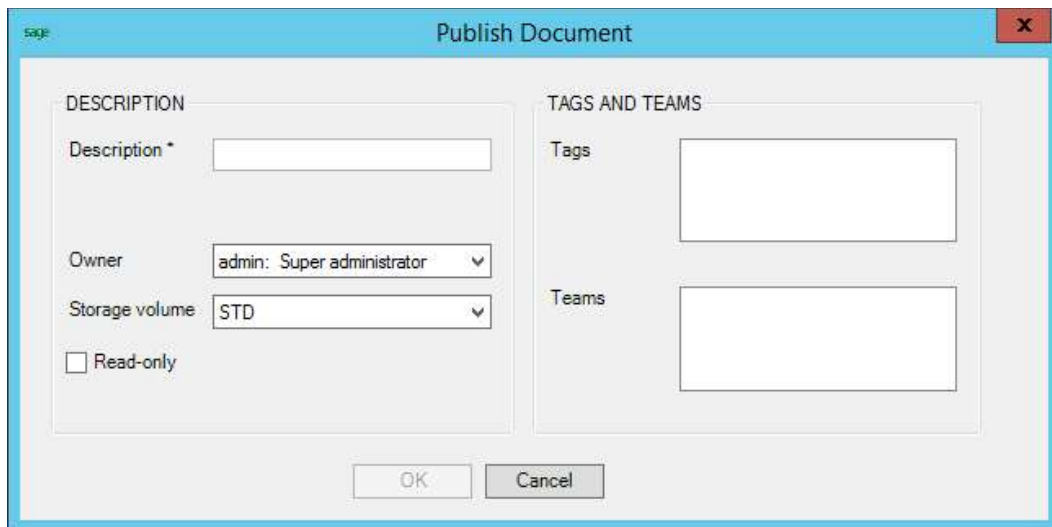
Adding data from a data source by entity

In the Workbook settings window, select Data model browse to add a data source by entity.
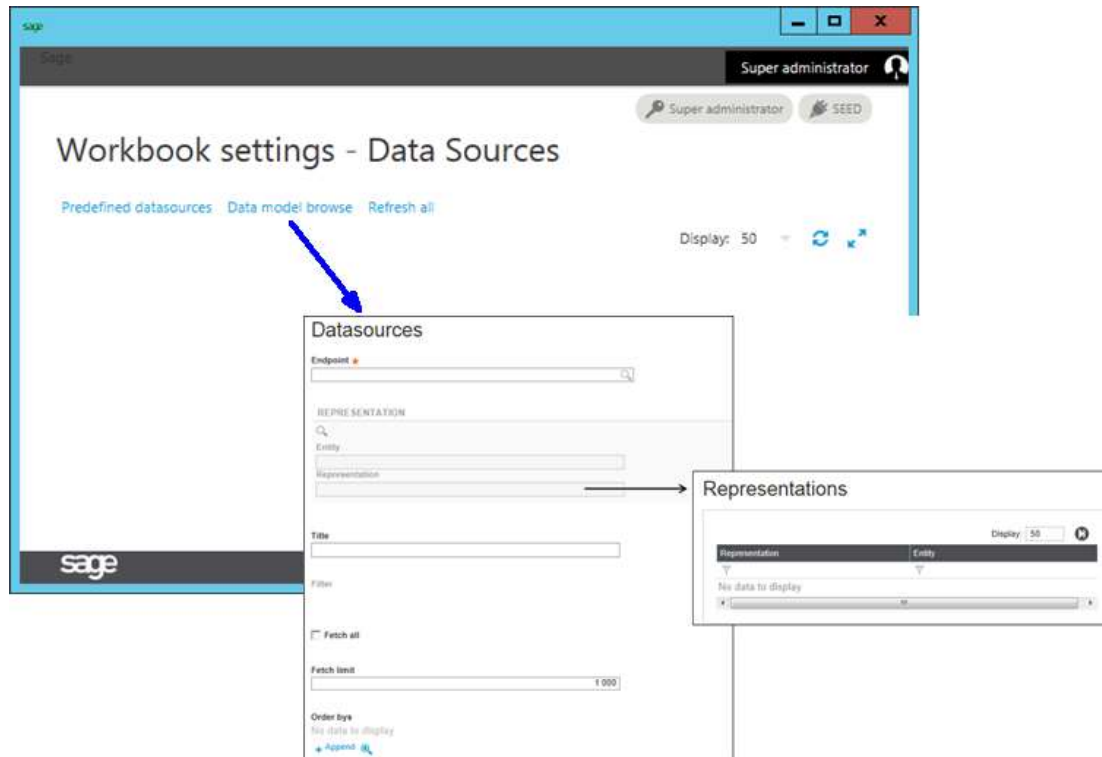
- The data from the data source selected is inserted at the current position of the cursor in the Excel spreadsheet. This can be on the same tab or a new tab.

Exporting data to Microsoft Excel (continued)

Publishing

After creating the spreadsheet, you can publish the document so that it can be viewed and edited through Sage X3. To publish the document on a collaborative space, click the Publish as button on the Sage ribbon and select to publish as a document or an Excel report template.
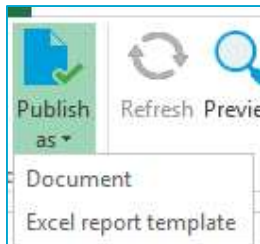
To publish as a document:

- Enter a description for the document.

- You can use the Teams field to assign the document to a specific team. Only users assigned to the team can view the document.

- If the Read-only check box is selected, only the owner can edit the document.

- The owner automatically defaults to the current user's ID.

Exporting data to Microsoft Excel (continued)

To publish as an Excel report template:

Exporting data to Microsoft Excel (continued)

Exporting data to Excel from a grid

The process for exporting to Excel is slightly different than the process used when exporting from a List, View, or Edit page. When exporting from a grid (using the Excel export option from the Actions icon), you can give the spreadsheet a title as well as define the name of the tab generated.
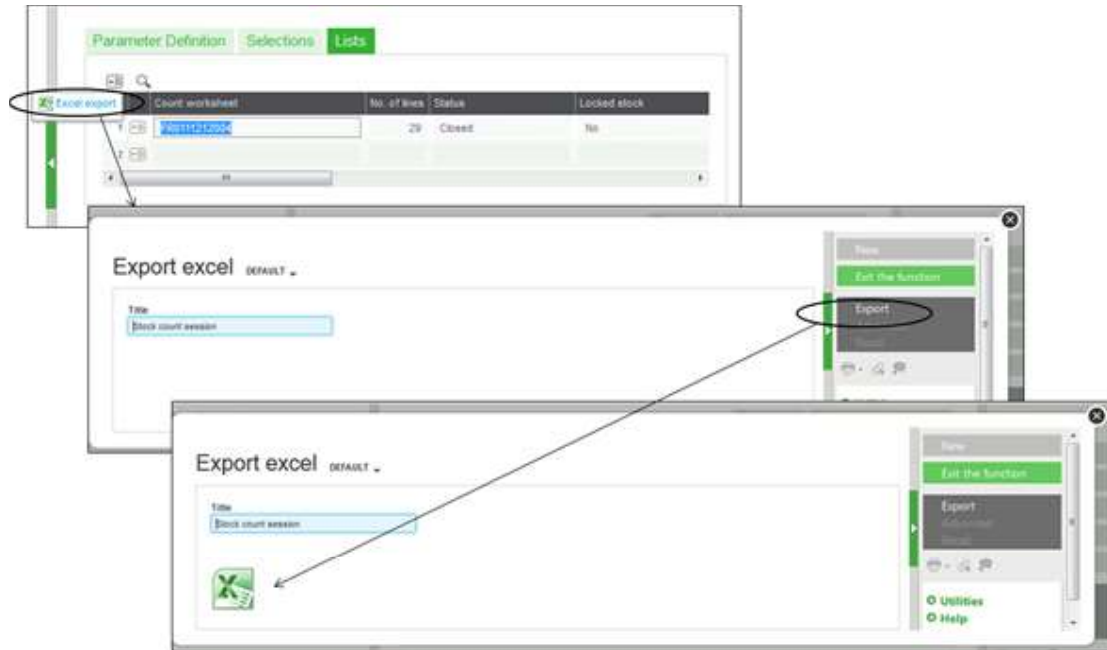
- When Export is selected in the Right panel, the data is collected and an Excel icon is added to the Export excel window. Click the Excel icon to view the spreadsheet in Microsoft Excel.

- After clicking the Excel icon to view the spreadsheet, all other options previously discussed, such as adding data sources and connecting to a server are the same.