Document number	Revision
DOCU12420	1

Export grid to Excel

Export grid to Excel Background Introduction Procedure **Accessing Export Export options** Export formatted to Excel (Web guery) Run Export formatted to Excel on PC Run Export formatted to Excel on MAC Excel V. 15 Excel 2011 Run Export formatted to Excel on Linux Export text to Excel (Web query) Download spreadsheet Download spreadsheet on PC Download spreadsheet on MAC Download spreadsheet on Linux Download package

Background

This article introduces you to the process of exporting any list of items (grid) to external Microsoft Excel worksheets.

Introduction

Highstage enable the user to export any information from a grid view into various file formats. This functionality makes it easily possible to take data shown in a grid to any major spreadsheet program.

Exporting any item grid requires user level of Advanced User or above to be visible and available.

Procedure

Highstage support several ways of exporting data to other application, including Microsoft Excel on PC and Mac, together with OpenOffice and LibreOffice for PC, Mac and Linux.

There are 2 general ways of exporting data, either by exporting the grid data as an (.XLS) spreadsheet file, or to make use of the Excel specific feature Web Query. Web queries makes it possible for the user to auto update the collected data from Excel.

Accessing Export

You can access the item grid export by navigating to **Options>Export** from any item grid:

Home	Refresh	Mail System	Reset										ST	Logout User leve	:AdvancedUser 🕤	ViewAs:
	Doci	ument sear	ch	Data c	olumns 💙	SEARCH Grid: de	efault 🗸 🖌 Filter: Latest	✓ Help								
	✓ Option:	s														
Search	Max	* Total	Wide 🗌	Details 🗖	Export		id view									
> ACTIONS	> Backg	round filters														
DOCUMENTS My Documents	> Design															
My reviews and approvals	✓ Results															
My rejected Search New	≡	Item	File	Folder	Revs	Status _	Description	Workspace	Working	Freeze	Review	Approval	Approved	EventTime-	ItemType _	.Class
Types Create type > PARTS	1	COMP11294-1A		>	•	Working	Placement	TEST	ST					2019-09-24	СОМР	
> PROJECT	2	DOCU11270-1A	.docx (.pdf)	>		Freeze	test comments	TEST	ST					2019-09-13	DOCU	
	3 +	DOCU11273-1A		>		Working	Relay component	TEST	ST					2019-09-12	DOCU	
	4	DD11260-1A	.xml	>	9	Working	TemplateDocument for ECAD	TEST	ST					2019-09-03	DD	
	5 +	DOCU11244-1A	.xlsx	>		Working	Reference Import testing	TEST	ST					2019-08-30	DOCU	
	6 +	DOCU11234-2B Working sample document	.html	>	•	Working	Sample Document	STACK	ST		ST	ST		2019-06-24	DOCU	
	7 +	DOCU11237-2B	.rtf	>	9	Working	Products	STACK	ST			ST		2019-06-24	DOCU	
	8 +	DOCU11238-2	.docx (.pdf)	>		Approved	Tools	STACK	ST			ST		2019-06-24	DOCU	
	Page cn 9ms/41K	eated 2019-09-30 1 B	13:13:06 CI	ET										Delivered by Highst	age 📢	

Using the Export feature in this example will export the following grid view (*Results*) with items and associated data columns:

				Data c	olumns 🗸	SEARCH Grid: de	efault 👻 🛛 Filter: Latest 🦄	Help								
	✓ Option	5														
	Max	🔡 🔹 Total 🗖	Wide 🗖	Details 🗖	Export	ormat:xhtml Hel	p ToDo by Person(s)									
	> Backg	round filters														
inits uments	> Design													Popult grid for export		
ws and approvals	✓ Results													Result griu		
ted	≡	Item	File	Folder	Revs	Status _	Description	Workspace	Working	Freeze	Review	Approval	Approved	EventTime-	ItemType _	
es ate type TS JECT	1	COMP11294-1A	3	>	9	Working	Placement	TEST	ST					2019-09-24	COMP	
	2	DOCU11270-1A	.docx (.pdf)	>		Freeze	test comments	TEST	ST		l			2019-09-13	DOCU	
	3 +	DOCU11273-1A		>	-	Working	Relay component	TEST	ST					2019-09-12	DOCU	
	4	DD11260-1A	.xml	>		Working	TemplateDocument for ECAD	TEST	ST					2019-09-03	DD	
	5 🔸	DOCU11244-1A	.xlsx	>		Working	Reference Import testing	TEST	ST					2019-08-30	DOCU	
	6 +	DOCU11234-2B Working sample document	.html	>	-	Working	Sample Document	STACK	ST		ST	ST		2019-06-24	DOCU	
	7 +	DOCU11237-2B	.rtf	>	-	Working	Products	STACK	ST			ST		2019-06-24	DOCU	
	8 +	DOCU11238-2	.docx (.pdf)	>		Approved	Tools	STACK	ST			ST		2019-06-24	DOCU	

Clicking on Export reveals the *Export* dialogue:

Export	×
Export formatted to Excel	Export formatted data. Data can be refreshed from Excel. An .igy file will be generated for download. Open the file and answer Enable to Excel prompt to enable data connection.
Export text to Excel	Export data as unformatted text. Data can be refreshed from Excel. An .igy file will be generated for download. Open the file and answer Enable to Excel prompt to enable data connection.
Download spreadsheet	Export grid data to .xisx file and download file. Works cross platform, Excel is however not able to refresh data.
Download package	Export files and grid data (xisx file) to zip file and download file. Works cross platform, Excel is not able to refresh data.
01.005	

Export options

The following grid export options are available (*Click on any of the options to read more about the export option in detail*):

Export formatted to Excel, Export text to Excel, Download spreadsheet and Download package.

Option	Description
Export formatted to Excel	Export formatted data. Data can be refreshed from Excel. An <i>.iqy</i> file will be generated for download. Open the file and answer Enable to Excel prompt to enable data connection.
Export text to Excel	Export data as unformatted text. Data can be refreshed from Excel. An <i>.iqy</i> file will be generated for download. Open the file and click <i>Enable</i> to Excel prompt to enable data connection.
Download spreadsheet	Export grid data to <i>.xlsx</i> file and download file. Works cross platform, Excel is however not able to refresh data.
Download package	Export files and grid data <i>(.xlsx file)</i> to zip file and download file. Works cross platform, Excel is not able to refresh data.

Web queries

Web query is the preferred way to export data from Highstage to excel. Besides fetching data from Highstage with use of Web query, it makes the user able to fetch the newest data from Highstage, if any changes have happened from the search the web query were derived from.

The export options Export formatted to Excel and Export text to Excel makes use of web query.

Export formatted to Excel (Web query)

Run Export formatted to Excel on PC

1) Click on Export formatted to Excel .

This prompts a file download (*export.iqy*) where you can choose to open or save the file:

	Home Refresh	Mail Syste	em Reset									S	T Logout	User level:AdvancedUse	r ✔ ViewAs:
Doo	ument sear	ch													
			Data columns	s 🗙 SEARCH	Grid: default 🗸	Filter: Latest 🗸 📕	elp								
✓ Optio	ns														
Max	* Total 🗆	Wide 🔲 Det	ails 🗌 🛛 Expo	rt format:xhtm	I Help ToDo b	y Person(s)									
> Back	ground filters														
> Desig	n														
	Item	File	Folder	Revs	Status _	Opening export.iqy			×	Review	Approval	Approved	EventTime-	ItemType _	.Class
1	COMP11294-1A	7	>	5	Working	You have chosen to o	open:			C)	2019-09-24	COMP	
2	DOCU11270-1A	.docx (.pdf)	>	•	Freeze	which is: Micro from: https://s	osoft Excel Web Query File ktsd.highstage.net	(211 bytes)		C			2019-09-13	DOCU	
3 -	DOCU11273-1A		>	•	Working	What should Firefox	do with this file?						2019-09-12	DOCU	
4	DD11260-1A	xml	>		Working	Open with	Aicrosoft Excel (default)		~				2019-09-03	DD	
5 4	DOCU11244-1A	.xlsx	>		Working	Do this gutom	atically for files like this fro	m now on.					2019-08-30	DOCU	
6 .	DOCU11234-2B Working sample document	.html	>		Working			OK	Cancel	ST	ST		2019-06-24	DOCU	
7 💽	DOCU11237-2B	.rtf	>	•	Working	Products	STACK	ST			ST		2019-06-24	DOCU	
8 -	DOCU11238-2	.docx (.pdf)	>	•	Approved	Tools	STACK	ST			ST		2019-06-24	DOCU	
Page of 169ms/	reated 2019-09-30 1 41KB	13:26:26 CET											Delivere	ghstage	

2) Save the file, or open the file directly in Microsoft Excel.

Excel will now prompt the user with permission to access the data from the Highstage server *(Microsoft Excel for PC Security notice)*:

Microsoft	Exce	I Security N	lotice		?	×
🔘 🛚	licro	soft Office I	has identified	i a potential	security c	oncern.
File Path:	C:\(Jsers\Stefar	nS\AppData\I	local\Temp\e	xport-4.iq	У
Data conn connectior this conter	ectio ns, yo nt un	ns have bee our compute iless you tru	en blocked. It er may no lor ist the source	f you choose nger be secu e of this file.	to enable re. Do not	e data enable

3) Click Enable " to proceed and allow the data connection.

You will now be prompted for login information to Highstage (*windows HTTP Security authentication*):

Windo	ws Security					×
EXC	EL.EXE					
Conn	ecting to sl	ktsd.highst	age.net.			
Highs	stage\ST					
Pass	sword					
L F	Remember	my creden	tials			
More	choices					
	o	K		C	Cancel	

4) Input your Highstage login credentials and press OK.

The data columns from the selected grid is now exported to Excel:

File	Home Insert Page Layout Formu	ulas Data	Review	Vie	w Help	Acrobat 📿 Tell me what you w	vant to do					77			-0-V		~ 0	A Share
Paste	★ Cut Segoe UI • 11 ⓑ Copy ~ ● I □ • 11 ♥ Format Painter □ I □ • ≤ Clipboard r₂ Font Font	• A* A*		- ≫ - 	ab Wrap	p Text General ge & Center ▼ \$ ▼ % ≯ 500 - S Number	Condition Formattin Fa	nal Formata: g * Table *	Norma Good St	al	Bad Neutral	4 9 9	Insert Delete Fo	Dormat ▼ C	utoSum II * Iear * Ec	Sort & I Filter * S	ind & elect *	^
A1	• • × × : • •																	
	В	С	D	E	F	G	н	1.1	J.	К	L	M	N	0	P	Q	R	S 🔺
1	Item	File	Folder	Revs	Status 	Description	Workspace	Working	Freeze	Review	Approval	Approved	EventTime-	ItemType 	.Class			
3 1	COMP11294-1A			Â	Working	Placement	TEST	<u>ST</u>					2019-09-24	COMP				
4 2	DOCU11270-1A	.docx (.pdf)		Â	Freeze	test comments	TEST	ST					2019-09-13	DOCU				
5 3	DOCU11273-1A			Â	Working	Relay component	TEST	<u>ST</u>					2019-09-12	DOCU				
6 4	DD11260-1A	.xml		Â	Working	TemplateDocument for ECAD	TEST	<u>ST</u>					2019-09-03	DD				
7 5	DOCU11244-1A	.xlsx		Â	Working	Reference Import testing	TEST	<u>ST</u>					2019-08-30	DOCU				
8 6	DOCU11234-2B Working sample document	.html		Â	Working	Sample Document	STACK	<u>ST</u>		<u>ST</u>	ST		2019-06-24	DOCU				
9 7	DOCU11237-2B	.rtf		Â	Working	Products	STACK	<u>ST</u>			ST		2019-06-24	DOCU				
10 8	DOCU11238-2	.docx (.pdf)		Â	Approved	Tools	STACK	<u>ST</u>			ST		2019-06-24	DOCU				
11																		
12																		
13																		
14																		
15																		
17																		
18																		
19																		
20																		
21																		
22																		
23																		
24																		
25																		
-	export-4 (+)									4					_			•

Run Export formatted to Excel on MAC

Excel V. 15

Excel for Mac Version V.15 does not support use of web query if the page is password protected, since most Highstage installation is highly secured, this function does not work properly on most installations, due to incompatibility in Excel V.15 for Mac.

1) Download the Web query file (*.iqy*) file by selecting [Export to Formatted Excel] or [Export text to Excel] in the export window.

Open an empty spreadsheet in Excel 15.

3) In the Excel menu pane, navigate to **Data** > **Get external Data** > **Run Saved Query**:

at Tools	Data Window Help						
Data Re	Sort Filter Clear Filters Advanced Filter	企業R		Workbook	1		
	Subtotals Validation		er -	J • %) 💽	.00 00 \$.0	Cond Form
F	Data Table Text to Columns Consolidate Group and Outline Edit Links Summarize with PivotTa Table Tools	► able) 		L 00/	M	
	Refresh Data		Fro Im Fro Im Ed Da Pa	om Databas port Text Fil om FileMake port from Fil it Query ita Range Pi rameters	ery le er ileMaker	Server.	

4) Locate the downloaded file from step 1, set the enable filter to [Query file] and click Get Data]:

			Q Search
Favorites	Name	Date Modified	Size Kind
Dropbox	export.iqy	22 Feb 2016 17:42	2 KB Micr
•	test excel	Yesterday 22:25	31 KB Micr
Applications			
iCloud Drive			
Desktop			
Documents	1		
Downloads			
Devices			
(Remote Disc	6		
			Cancel Get Data

5) Set the workbook settings for where you want to place the data.

Notice!

This function only works for Excel v.15 if the data is not protected by a username and password.

Excel 2011

Excel 2011 for Mac support Web query, but the file need to be run from inside Excel.

1) Download the Web query file (*.iqy*) file by selecting [Export to Formatted Excel] or [Export text to Excel] in the export window.

Open an empty spreadsheet in Excel 2011.

3) In the Excel menu pane, navigate to **Data** > **Get external Data** > **Run Saved Query**:

at T	ools	Data Window He	lp					
Data A=	Re	Sort Filter Clear Filters Advanced Filter	ሱ #R		Workbool	(1		
A		Subtotals Validation		ter -	J • %) 1	00, 00 00 \$00	Cond Form
	F	Data Table Text to Columns Consolidate Group and Outline Edit Links Summarize with Piv Table Tools Get External Data	rotTable	J	K In Saved Qu	L Jery	M	
	Get External Data Refresh Data			Fro Im Fro Im	om Databas port Text Fi om FileMake port from F	se ile er ileMaker	r Server.	
				Ed Da Pa	lit Query Ita Range P rameters	ropertie	s	

4) Locate the downloaded file from step 1, set the enable filter to [Query file] and click Get Data :

0 0 •	Choose a Q)uery		
	₩ × HS I	٥	Q, Search	
Favorites	Name	^	Date Modified	D.
Dropbox	export.iqy		Yesterday 17:42	
-	test excel		Today 22:25	
Applications				
All My Files				
iCloud Drive				
Desktop				
Documents				
Downloads				
Devices				
Pamata Dica	All Files			
	Query Files			
	Enable 🗸 Text Files			
			Cancel	et Data

5) Set the workbook settings for where you want to place the data.

6) First time excel fetches data form Highstage you will be prompted for login information to Highstage, please input the user credentials, and press [OK]:

X	Enter your user name and password for the server turbostage.net.							
	User name:							
	Password:							
	Save password in my Mac OS keychain							

Run *Export formatted to Excel* on Linux

In order to export the web view information to an excel format using the LibreOffice Calc application:

1) Copy the URL of the intendent exporting page/table from the web browser:

JRL of <u>e</u> xternal data source		ОК
https://turbostage.net/ts/ts/search.aspx?t=doc	v	
		Cancel
		Help

2) In the destination spreadsheet, go to the menu pane Insert > Link to External data:

D Externa		
	<u>U</u> ser name	
https://turk		OK
Inceps.//cure	Password	Cancel
<u>A</u> vailable table	<u>Remember password</u>	<u>H</u> elp
	<u>H</u> elp <u>OK</u> <u>C</u> ancel	
	Help <u>OK</u> Cancel	

3) Paste the URL in the indicated field and press Enter, after this a login form will popup and enter credentials:

IL of <u>e</u> xternal data source		ОК
https://turbostage.net/ts/ts/search.aspx?t=doc	v	Cancel
ailable tables/ranges		
HTML 1		Help
HTML_all		
HIML_CADLES		

4) Select **HTML_1** and proceed:

https://	'turbostage.net/ts/ts/search.aspx?t=	doc	•	-				
vailable	🛞 🗊 Import Options							
	Select the language to use for im Automatic	port	<u>O</u> K	<u>H</u> elp				
	O Custom English (USA)	(‡)	Cancel					
	Options	as dates).	<u>H</u> elp					
Upd	ate every 60 🗘 seconds		_					

Export text to Excel (Web query)

The *Export text to Excel* option exports the grid view of items and associated columns to an Excel sheet.

For this export grid option, formatting and links are omitted from the export:

	ile Home Insert Page Layout Form	nulas Data	Review	v Vie	zw Hel	lp Acrobat Q Tell me wh	at you want to												A, Sha	
	Calibri - 11	· A A	= =	*	- 85 v	Vrap Text General	-		L Format	Nor	rmal	Bad	-		kata Format	∑ AutoS ↓ Fill +	um * AZY			
P 0	→ V Format Painter	🗢 - 🔼 -	= = =	•	2 🕀 M	Merge & Center * \$ * % *	.00 .00	Formatting	 Table 	as GOC	a	Neutral	Ŧ	*		🦑 Clear	Filter	* Select *		
	Clipboard 12 Font	5		A	lignment	ra Numbe	er G				Styles			c	ells		Editing			^
A1	• : × ✓ fx																			~
	A B	с	D	E	F	G	н	1	J	к	L	м	N	0	P	Q	R S	т	U	
1	Item	File	Folder I	Revs S	tatus	Description	Workspace	Working	Freeze	Review	Approval	Approved	EventTime-	ItemType	.Class					
2																				
3	1 COMP11294-1A		1	M	Vorking	Placement	TEST	ST					2019-09-24	COMP						
4	2 DOCU11270-1A	.docx (.pdf)	j	Fi	reeze	test comments	TEST	ST					2019-09-13	DOCU						
5	3 DOCU11273-1A		j j	V	Vorking	Relay component	TEST	ST					2019-09-12	DOCU						
6	4 DD11260-1A	.xml	1	M	Vorking	TemplateDocument for ECAD	TEST	ST					2019-09-03	DD						
7	5 DOCU11244-1A	.xlsx	j	M	Vorking	Reference Import testing	TEST	ST					2019-08-30	DOCU						
8	6 DOCU11234-2B Working sample document	.html	1	V	Vorking	Sample Document	STACK	ST		ST	ST		2019-06-24	DOCU						
9	7 DOCU11237-2B	.rtf	1	M	Vorking	Products	STACK	ST			ST		2019-06-24	DOCU						
10	8 DOCU11238-2	.docx (.pdf)	j	A	pproved	Tools	STACK	ST			ST		2019-06-24	DOCU						
11																				
12																				_
13																				
14																				_
15																				_
16																				_
17																				
18																				_
19																				-11
20																				
21																				-
22																				-
23																				
24																				-
23																				-
20																				
	→ export-5 ⊕										E (4)									Þ
																III III	1 円 -		+ 10	1096

Notice!

The procedure for using the '*Export text to Excel*' is the same as for the '*Export formatted to Excel*'. Please refer to <u>this</u> chapter for a detailed description of the export procedure for PC, MAC and Linux users.

Download spreadsheet

Allows for an export of the grid data to an ______ file to be downloaded. This option, however, does not make it possible to refresh the data in Excel.

Download spreadsheet on PC

- 1) Click Download spreadsheet .
- 2) Locate the downloaded file and open it with Excel.

Download spreadsheet on MAC

- 1) Download the XLS by pressing Download Spreadsheet Or Download Package .
- 2) Locate the downloaded file and open it with Excel (Work with Excel 2011 and Excel for Mac).

Download spreadsheet on Linux

1) Download the XLS by pressing Download Spreadsheet Or Download Package.

2) Locate the downloaded file and open it with LibreOffice Calc ((Work with LibreOffice Calc and OpenOffice Calc)).

Download package

Download package allows for you to export not only the spreadsheet with the grid data, but also the associated files from the item folders. The collection of files are exported to a Zip folder for download.

1) Click on Download Package .

This will open the following tab, from where you can select the files associated with the items from the grid view:



2) Select any files from the **Files** column for export.

3) Select whether you want files to be combined into a single folder or separated into folders for each item (From the *Separate folders drop down menu*).

4) Click on DOWNLOAD.

