Reports - How to Export a Report

Question:

I have a report that I have run in Business Intelligence, but I need it in an Excel file. Can I export report results from BI?

Answer:

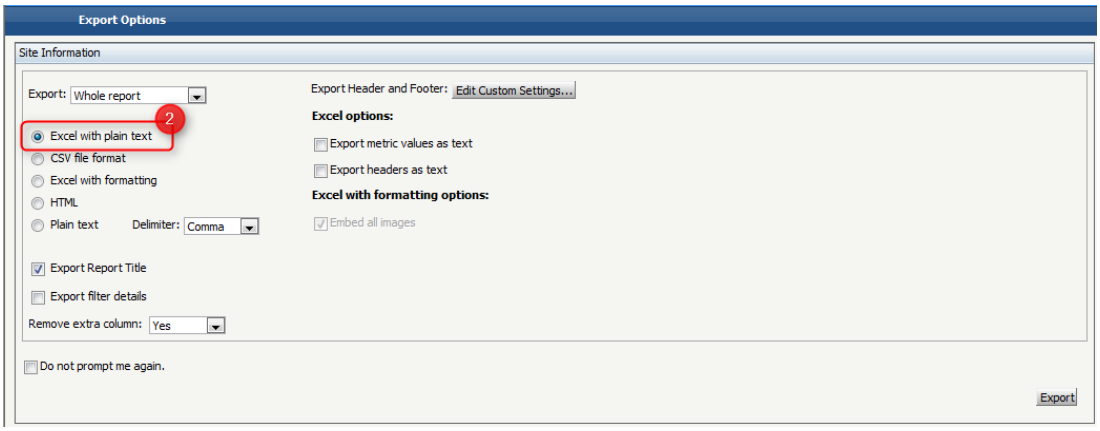
Business Intelligence allows users to export their report information from the system into several format types: Excel with formatting, Excel with plain text, CSV, HTML, Plain text, and PDF.

From a report results screen, the results can be exported in the following formats. To export to any format other than PDF, navigate to the Home tab at the top of the reports, and click on the Export button (1) shown in the following screenshot.

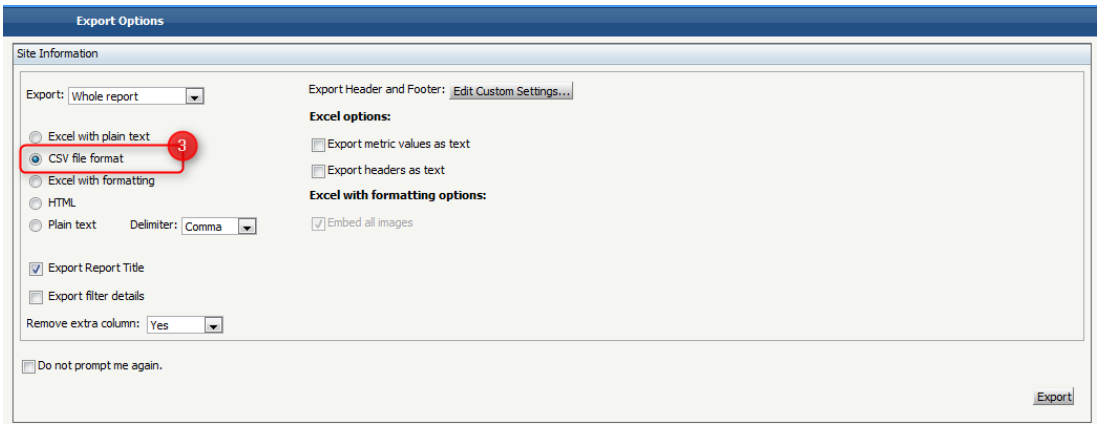
Reports can be exported in a variety of formats, such as HTML, Microsoft Excel, and plain text. The format is determined by the user based on whichever formats are appropriate for the specific report. Each format is described in detail below, to help decide what format suits the purpose of the report:

Excel with plain text (2): Reports can be exported to Microsoft Excel, in .xls format. After the report is exported, the content of the report is displayed using the default settings in Microsoft Excel. The structure and format of the report as it is displayed in MicroStrategy Web is not retained.

For large report results, this export option is recommended over Excel with formatting.



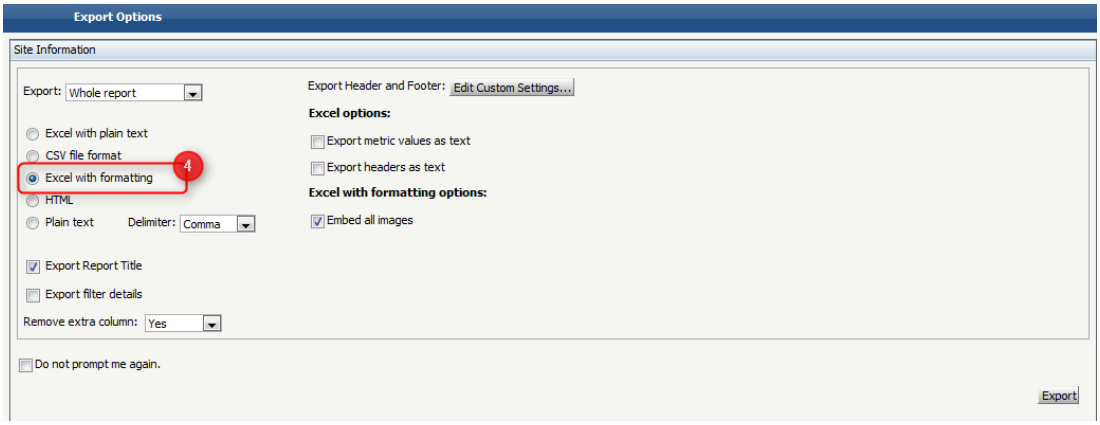
CSV file format (3): Reports can be exported to a comma-separated values file (CSV). After the report is exported, the report content is displayed in a CSV file as plain text. This format is suitable for Microsoft Access and Lotus 1-2-3. The structure and format of the report as it is displayed in MicroStrategy Web is not retained.



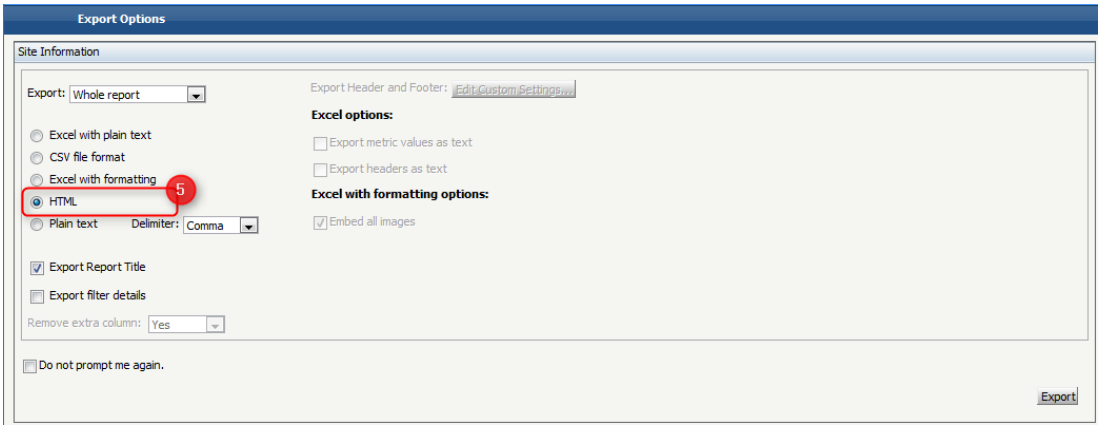
Excel with formatting (4): Reports can be exported to Microsoft Excel, in .xls format. After the report is exported, the report displays with the same formatting, color, and structure that appears in MicroStrategy Web.

Microsoft Excel does not support all colors that browsers do, so some colors may differ after export.

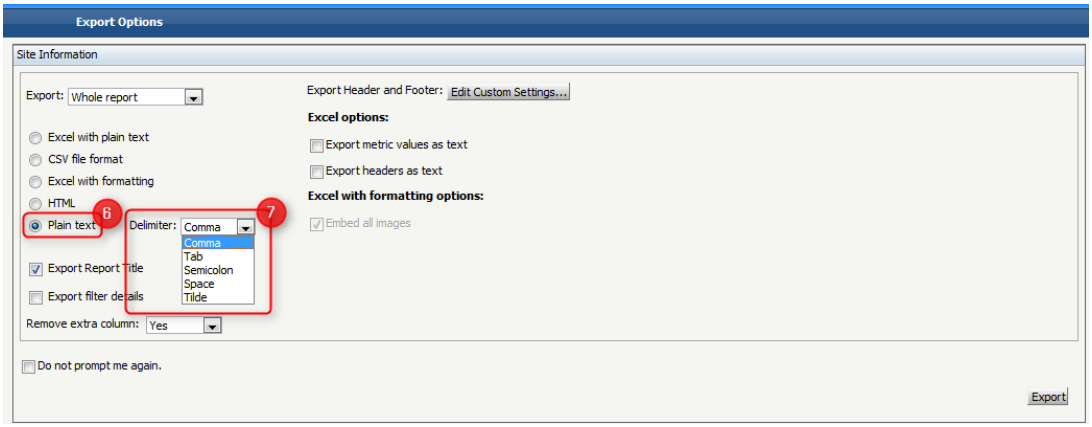
If the report is large, it is recommended that the Excel with plain text export option be used.



HTML (5): Reports can be exported to an HTML editor or browser, in .html format. After the report is exported, the report is displayed in an HTML page. The structure and format of the report as it appears in MicroStrategy Web is retained.



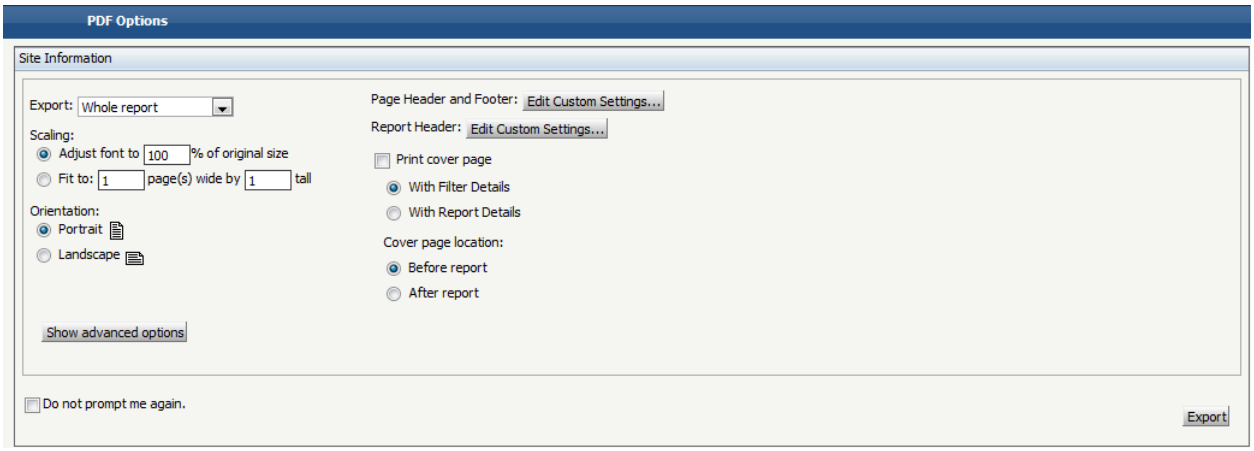
Plain text (6): Reports can be exported to a text editor, in .txt format. After the report is exported, the content of the report displays in a plain text page. The structure and format of the report as it appears in MicroStrategy Web is not retained. The delimiter option can be chosen from a comma, tab, semicolon, or space to separate the fields of text (7).



To export to PDF, navigate to the Home tab at the top of the reports, and click on the Export button (8) shown in the following screenshot.

PDF: Reports can be exported to an Adobe PDF viewer, in .pdf format. After the report is exported, the report content is displayed in an Adobe PDF file.

Before export, there are several export choices that provide options to specify which report details are exported, whether the data should be exported to PDF or another application, and more.


PDF Options
Site Information
Export: Whole report
Scaling:
Adjust font to 100 % of original size
Fit to: 1 page(s) wide by 1 tall
Orientation:
Portrait
Landscape
Show advanced options
Page Header and Footer: Edit Custom Settings...
Report Header: Edit Custom Settings...
Print cover page
With Filter Details
With Report Details
Cover page location:
Before report
After report
Do not prompt me again.
Export