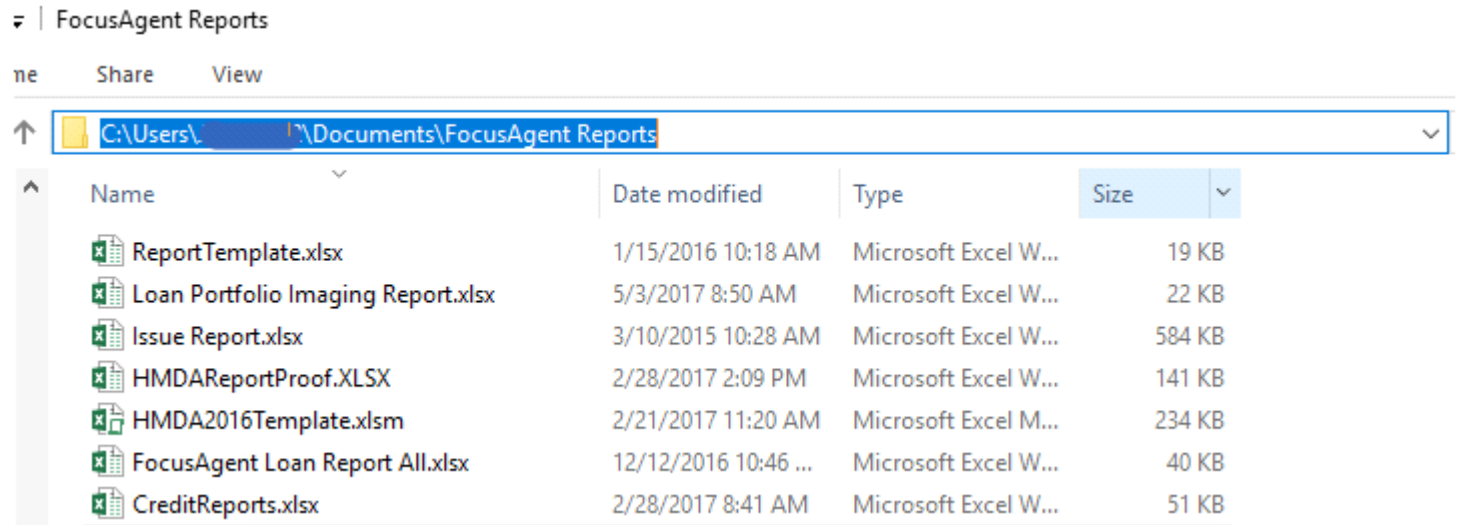# Export FocusAgent Data to Excel

Wednesday, May 3, 2017   9:13 AM

By default, FocusAgent will look for reports that reside in the user's Documents directory, in a \FocusAgent Reports folder.


In FocusAgent, click the Excel icon on the left hand side, to load the Report Manager.

Note: If you do not see an Excel icon within FocusAgent, you may need to verify whether or not you have either a **Folder Manager** or **Administrator** role, to have the ability to export data out of FocusAgent into Excel. Clicking on the Role pick list, will allow you to view whether or not you can click to enable either role.
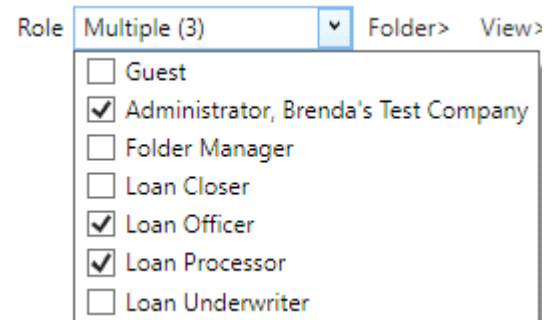

In the Report Manager dialog. Click to highlight the report you wish to run.
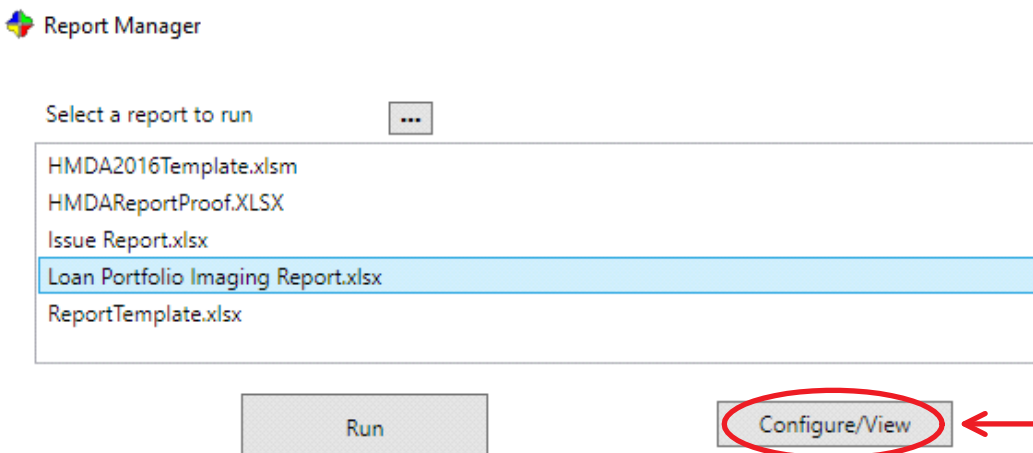
If you need to modify the start date when you wish to begin the data export, click on **Configure/View**

Excel will then load the report. Notice that there is a **Parameters** tab. This worksheet contains the unique FocusAgent identifier's that will be used to pull data requested out of FocusAgent and, into the Excel workbook. By and large you will not want to make changes to any unique identifier's on the Parameters tab unless you have an understanding of proper binding's and how to create reports.

Cell B3, which reflects the Folder Creation Date, is the cell that end user's may modify as needed. This date specifies the start date when you wish to begin your data export. If needed, modify the folder creation date, and then save your workbook with the updated change.
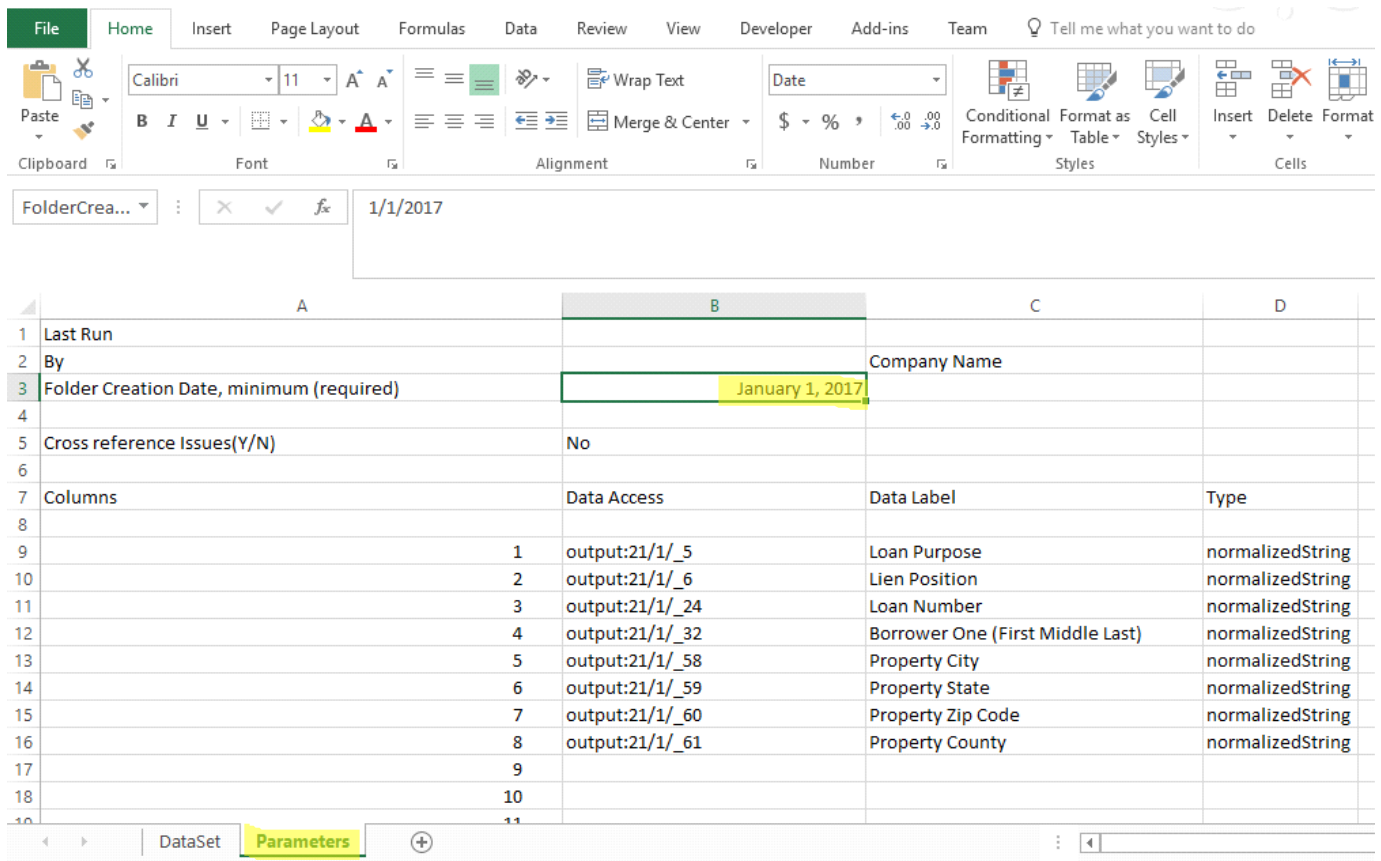
With the desired date saved, close excel and return to FocusAgent.

Click to **Run** the report.
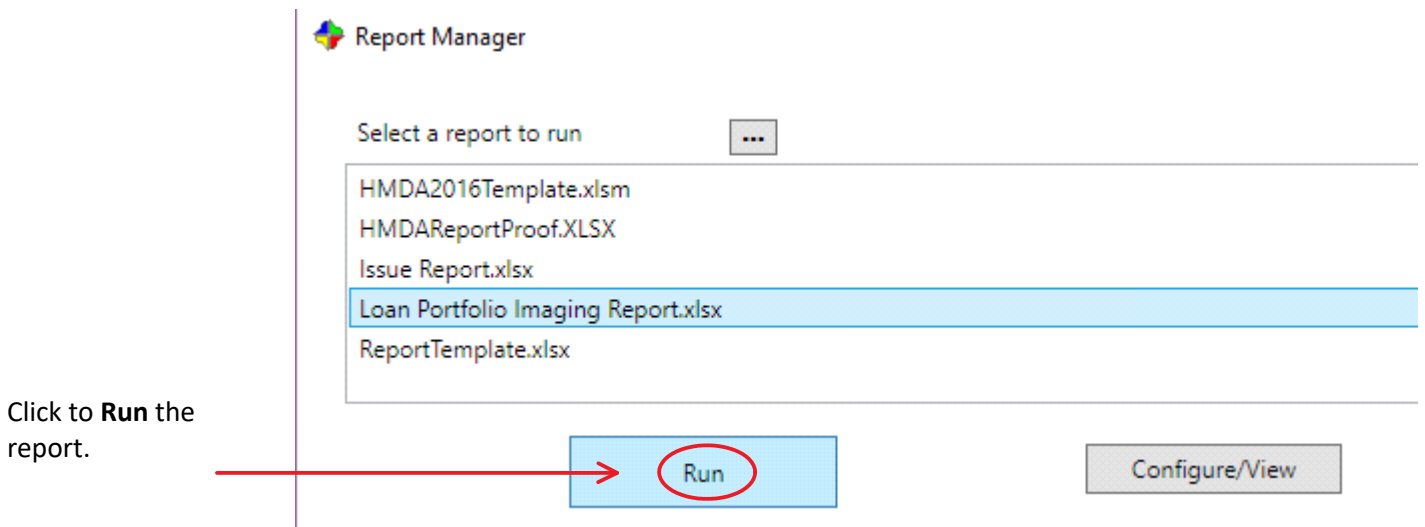
As the report collects the data, the dialog will display the number of folders found, and a progress bar.
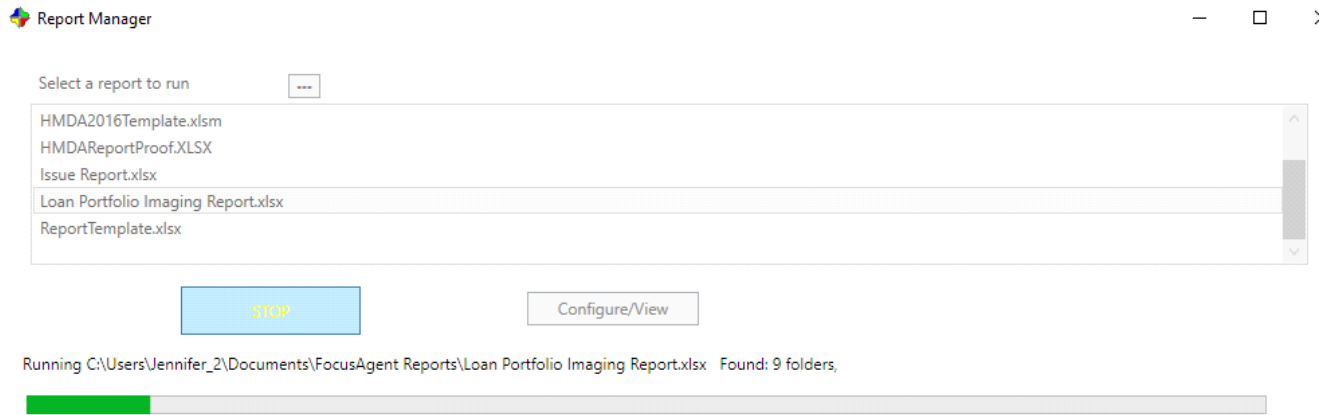
When progress is complete, if Excel loads behind the scenes, you may need to click on the Excel icon in the system tray, to open the report after it has finished running.

Within the Excel report, click on the **DataSet** tab to review the data that was collected.

It is then ***best practice*** to do a **File** and **Save As** and <u>save the report with data</u> in a ***different location***. Otherwise, if you save the file in the existing \FocusAgent Reports\ folder, any data or report changes will be overwritten the next time you run the report. Best practice is to save collected data elsewhere while conducting Excel report changes, for formatting and customizing data manipulation to your needs. This also safeguards from affecting the base Parameters tab, needed for running reports and collecting data.
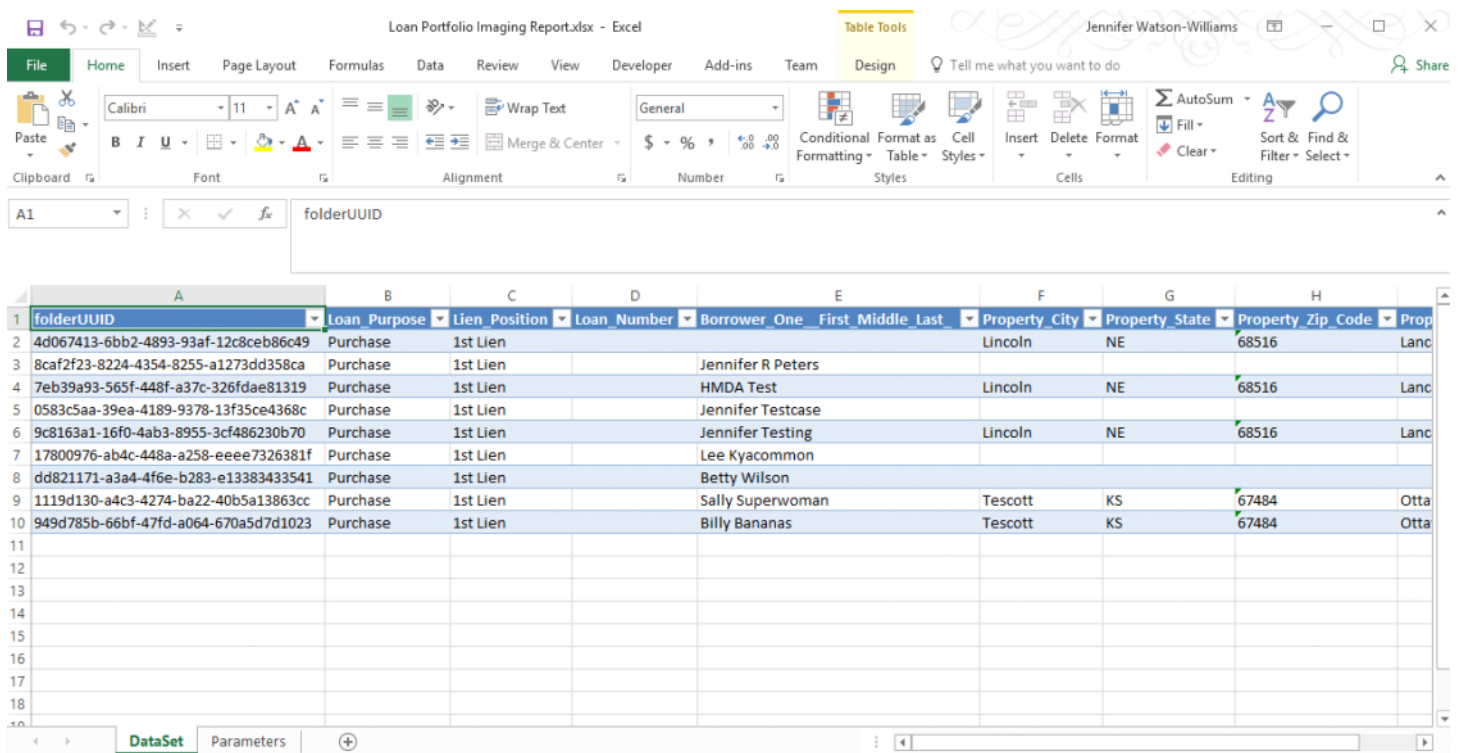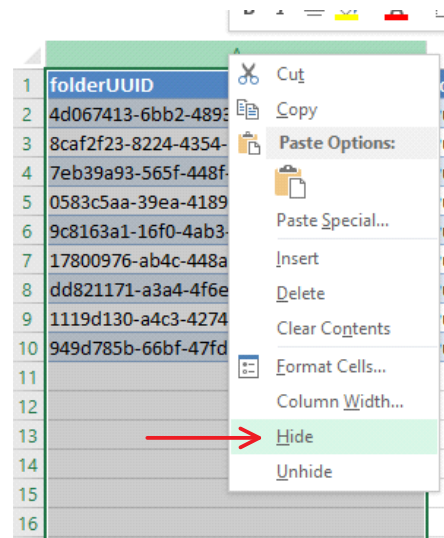
In this example, I have created an \Exported Reports\ folder in my Documents directory, where I will save the exported report to. I am also renaming the report to an identifiable name, according to how I plan to filter my report data.
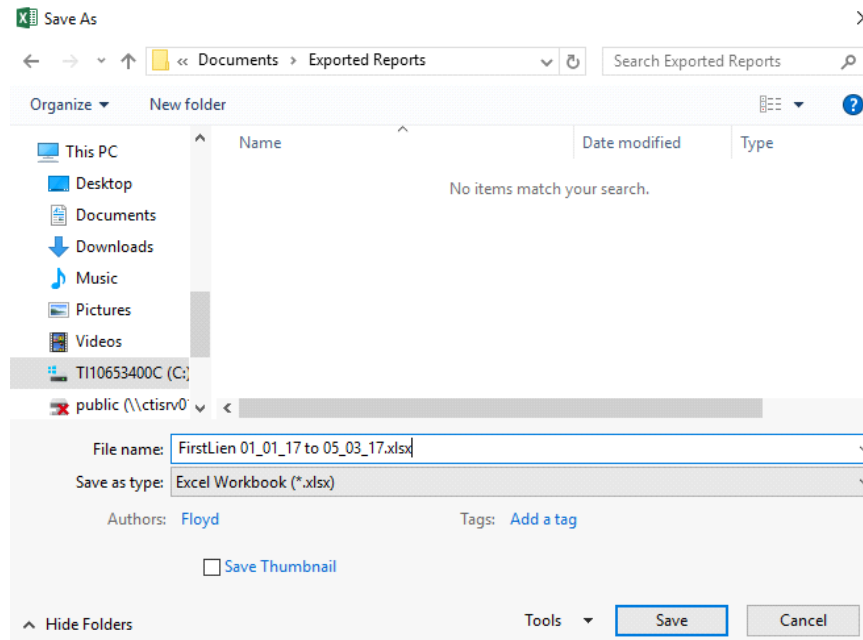
Now I can filter and modify my report in the other directory without affecting the base report.

Some ways in which you may wish to modify and manipulate the collected data, may include some of the following ideas;

You will notice that FocusAgent will always insert a folderUUID column at the front. This is for your troubleshooting needs, in the event you may want to load that specific folder to review data entered in FocusAgent. If you do not wish to see this custom ID on your final report, you may want to right click on the column header in order to hide the column.

You may also want to consider using filters. Clicking on the down arrow next to a column header, will allow you to select the types of loans you wish to display.

Filter any number of ways you may want the report to display, as well as save the report in any number of needed ways.