

Document number	Revision
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Export grid to Excel

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[Background](#)

[Introduction](#)

[Procedure](#)

[Accessing Export](#)

[Export options](#)

[Export formatted to Excel \(*Web query*\)](#)

[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

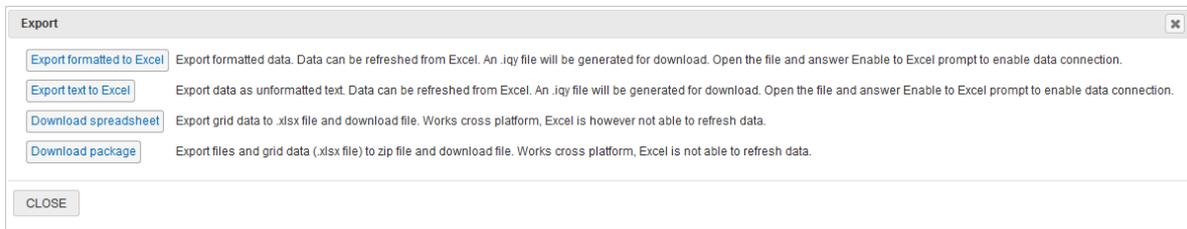
You can access the item grid export by navigating to **Options>Export** from any item grid:

The screenshot shows the Highstage software interface. At the top, there is a navigation bar with 'Home', 'Refresh', 'Mail', 'System', 'Reset', 'ST', 'Logout', 'User level: AdvancedUser', and 'View As...'. Below this is a 'Document search' section with a search bar, 'Data columns', 'SEARCH', 'Grid: default', and 'Filter: Latest'. The 'Options' menu is open, showing 'Max', 'Total', 'Wide', 'Details', and 'Export' (highlighted in orange). Below the 'Export' button is a 'Background filters' section and a 'Design' section. The 'Results' section contains a table with columns: Item, File, Folder, Revs, Status, Description, Workspace, Working, Freeze, Review, Approval, Approved, EventTime, ItemType, and Class. The table contains 8 rows of data. At the bottom, there is a footer with 'Page created 2019-09-30 13:13:06 CET', '9m3/41KB', and the Highstage logo.

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

The screenshot shows the Highstage software interface with the 'Export' dialog box open. The dialog box is titled 'Export' and has a 'format:html' dropdown and a 'Help' button. The 'Results' table is visible behind the dialog box, with a 'Result grid for export' label in the top right corner. The table contains 8 rows of data. At the bottom, there is a footer with 'Page created 2019-09-30 13:13:06 CET', '9m3/41KB', and the Highstage logo.

Clicking on **Export** reveals the *Export* dialogue:



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.

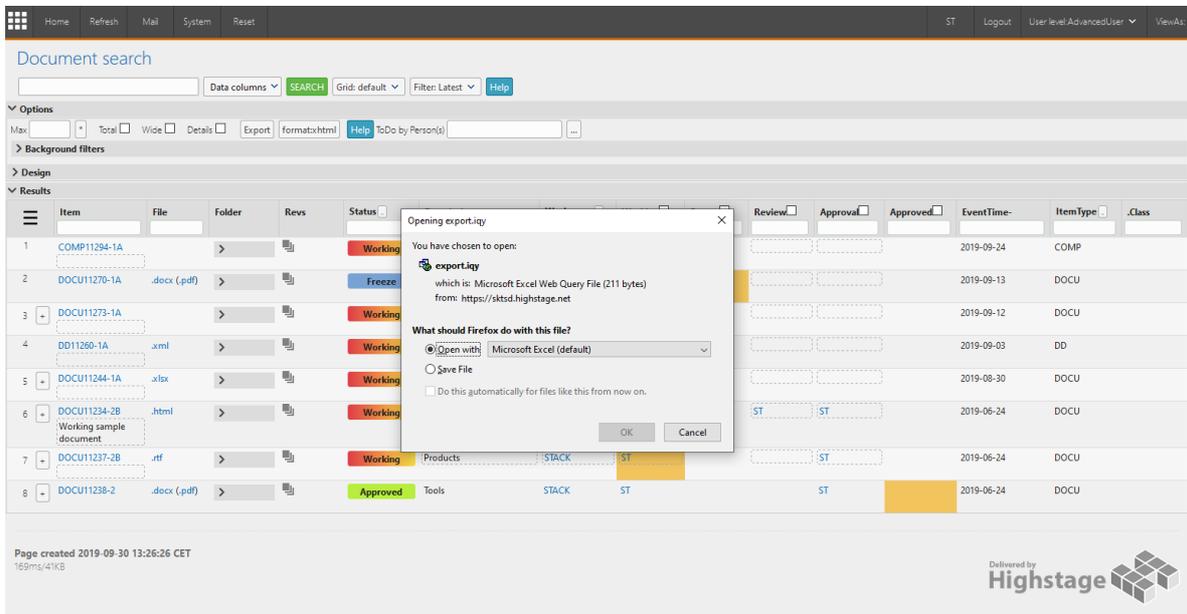
The export options [Export formatted to Excel](#) and [Export text to Excel](#) makes use of web query.

Export formatted to Excel (*Web query*)

Run *Export formatted to Excel* on PC

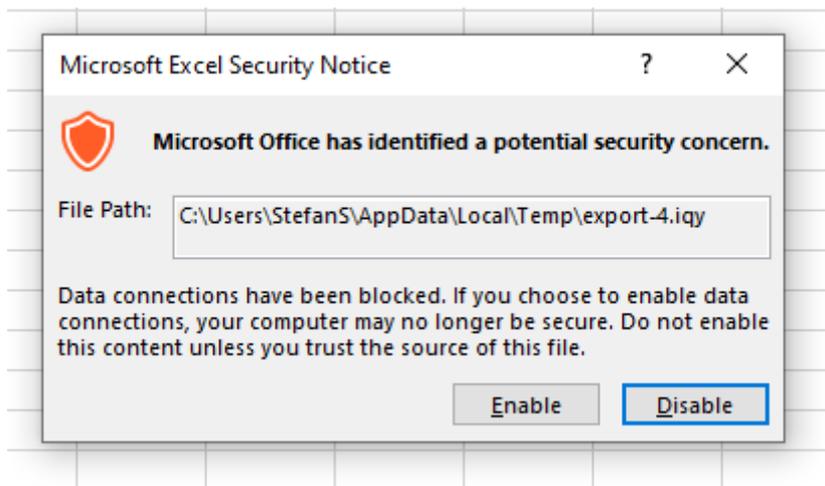
1) Click on [Export formatted to Excel](#).

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



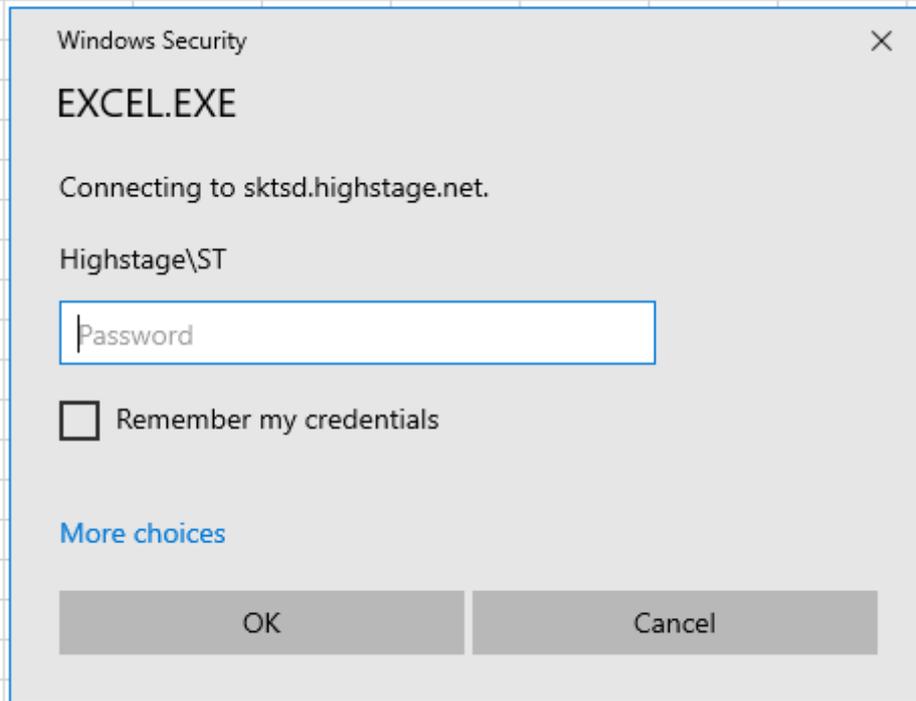
2) Save the file, or open the file directly in Microsoft Excel.

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



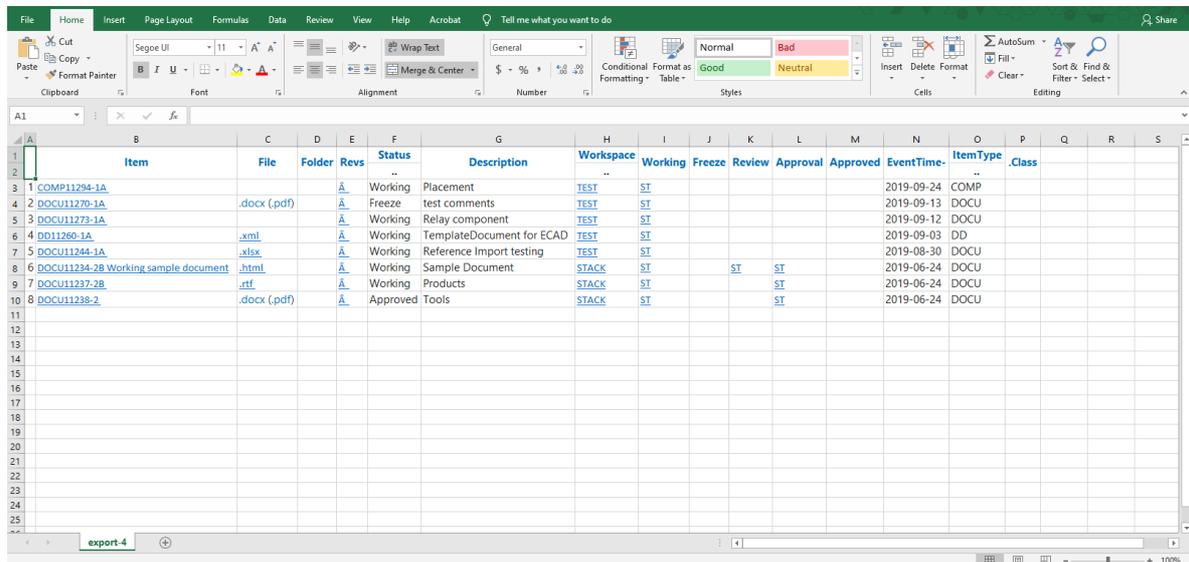
3) Click "Enable" to proceed and allow the data connection.

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



4) Input your Highstage login credentials and press OK.

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



Run Export formatted to Excel on MAC

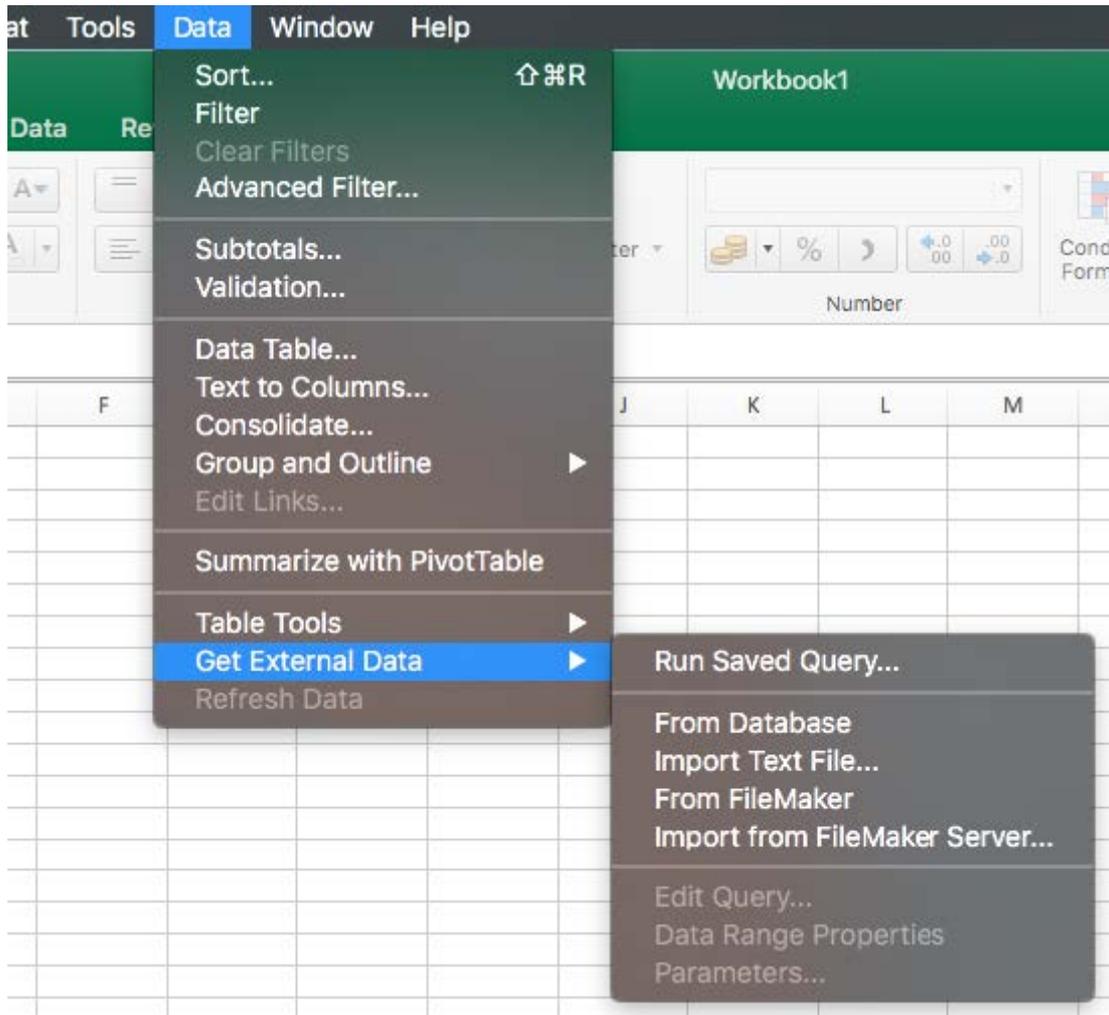
Excel V. 15

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.

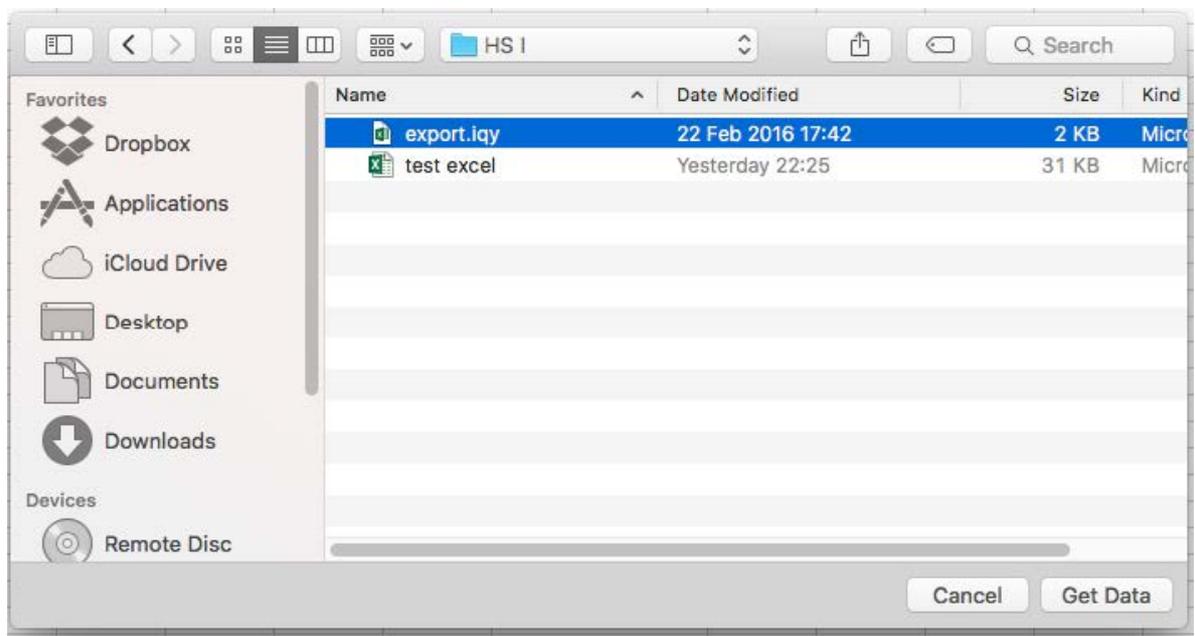
1) Download the Web query file (.iqy) file by selecting [Export to Formatted Excel] or [Export text to Excel] in the export window.

Open an empty spreadsheet in Excel 15.

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



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



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.

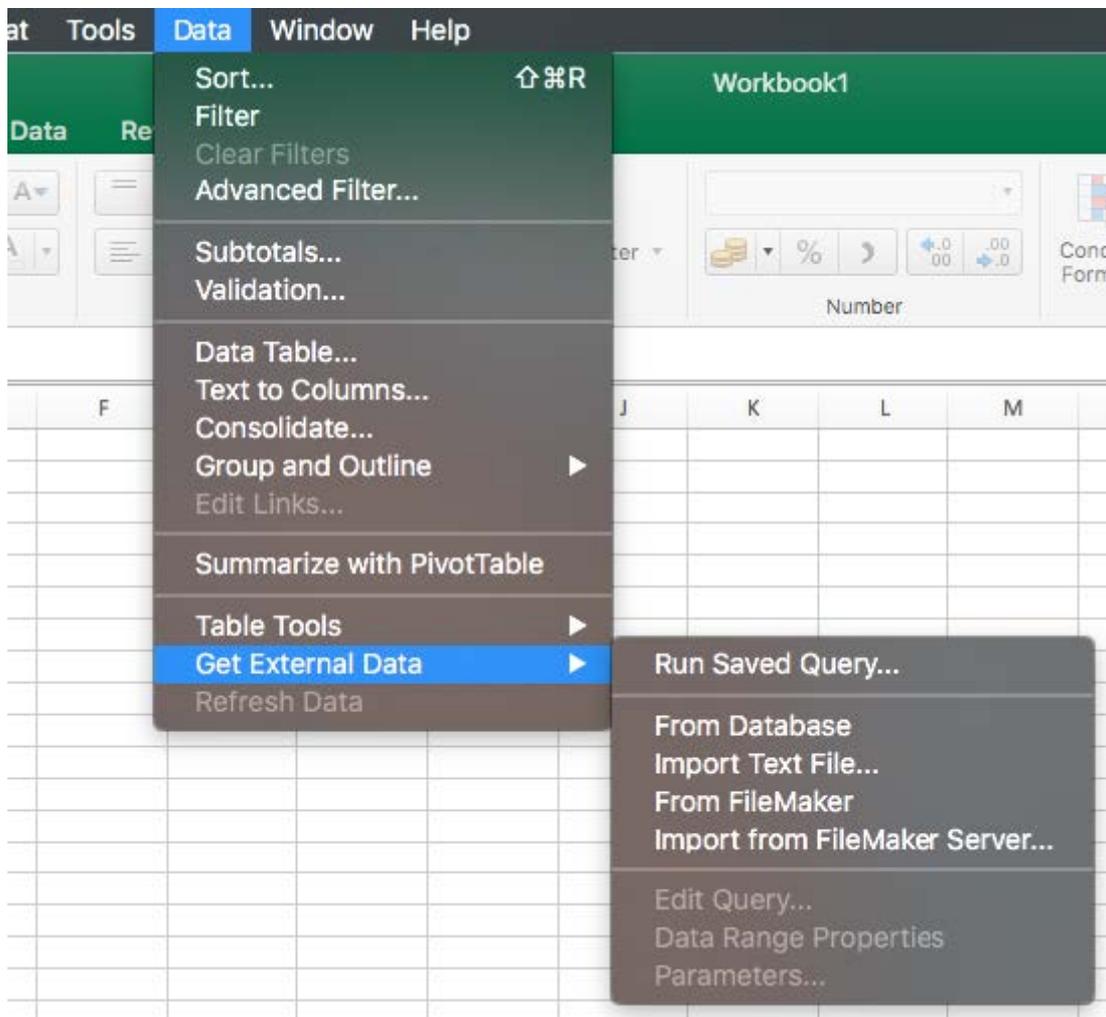
Excel 2011

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

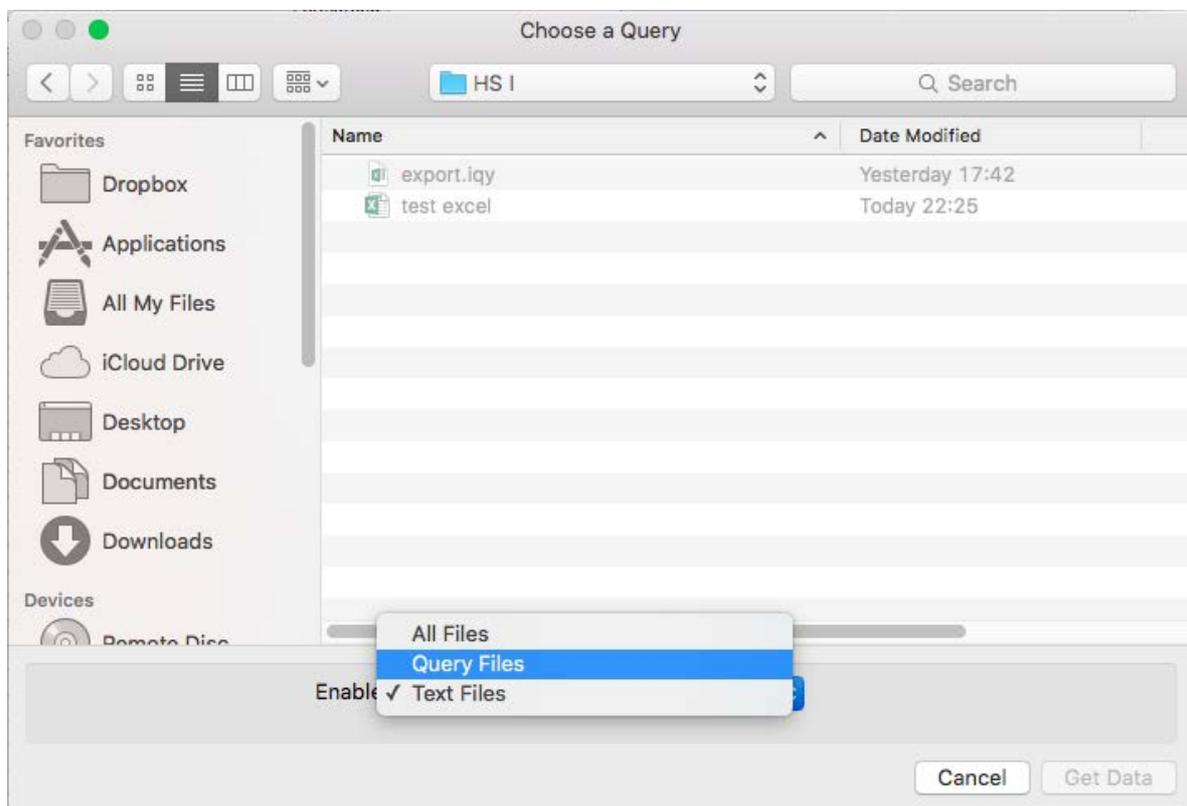
1) Download the Web query file (.iqy) file by selecting [Export to Formatted Excel] or [Export text to Excel] in the export window.

Open an empty spreadsheet in Excel 2011.

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



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



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

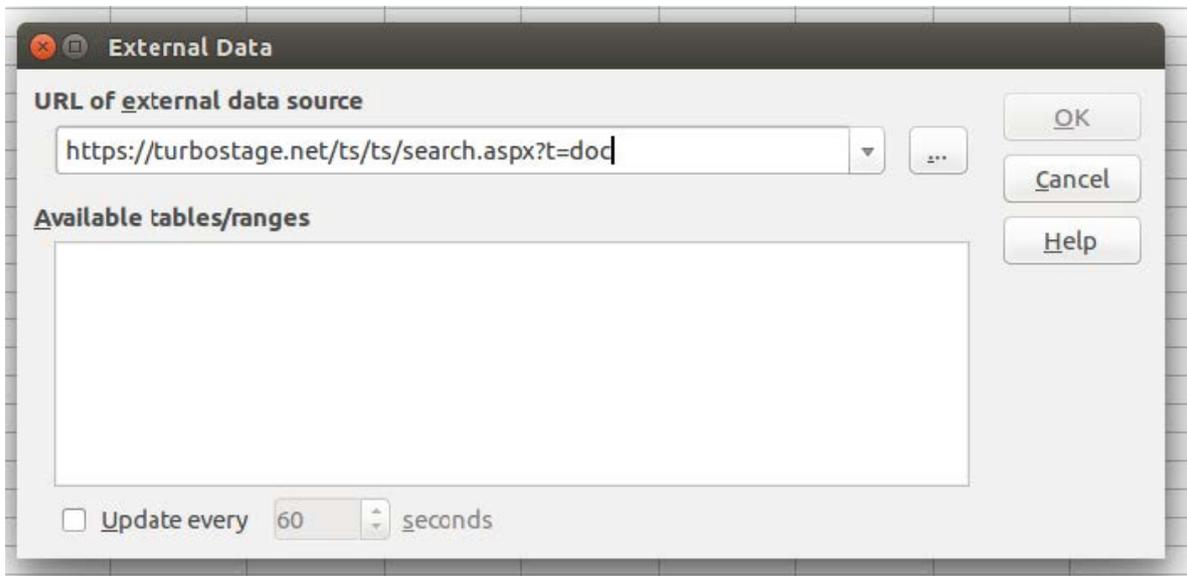
6) First time excel fetches data form Highstage you will be prompted for login information to Highstage, please input the user credentials, and press [OK]:



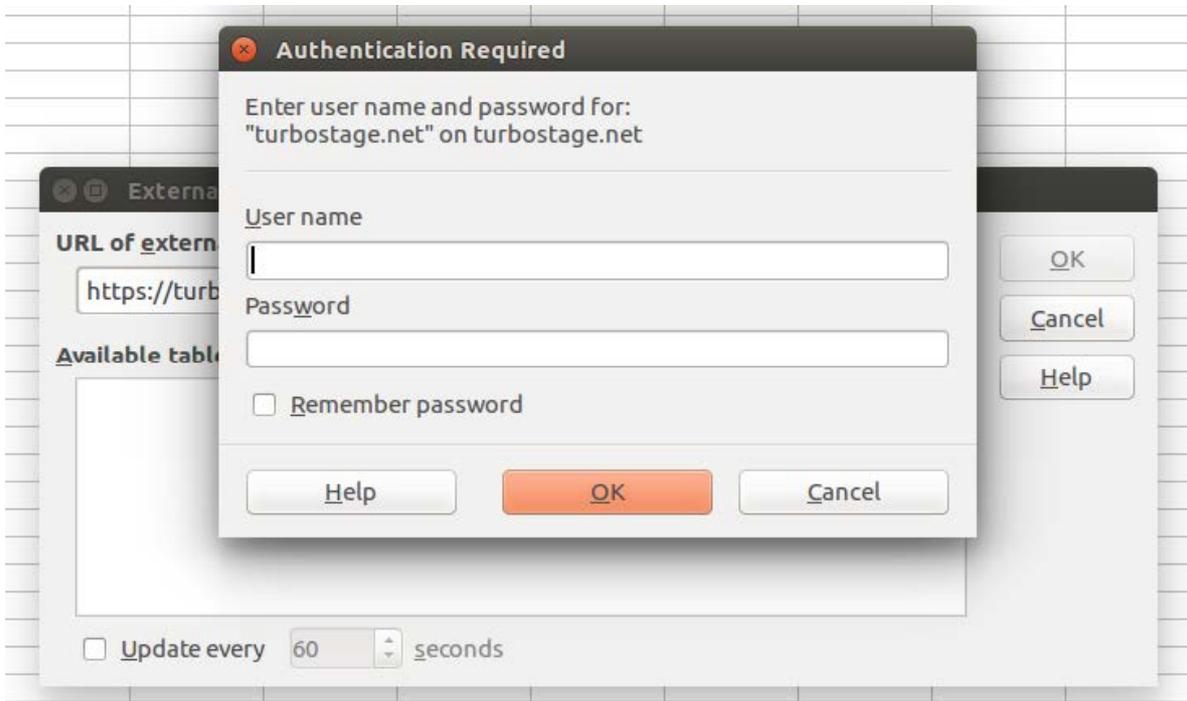
Run Export formatted to Excel on Linux

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

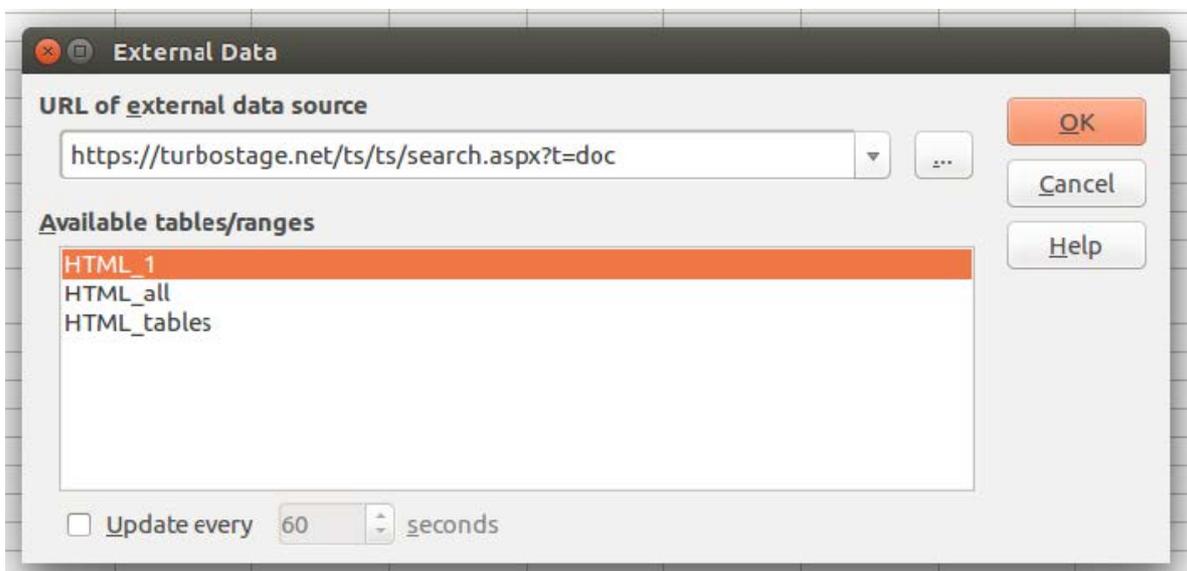
1) Copy the URL of the intendent exporting page/table from the web browser:



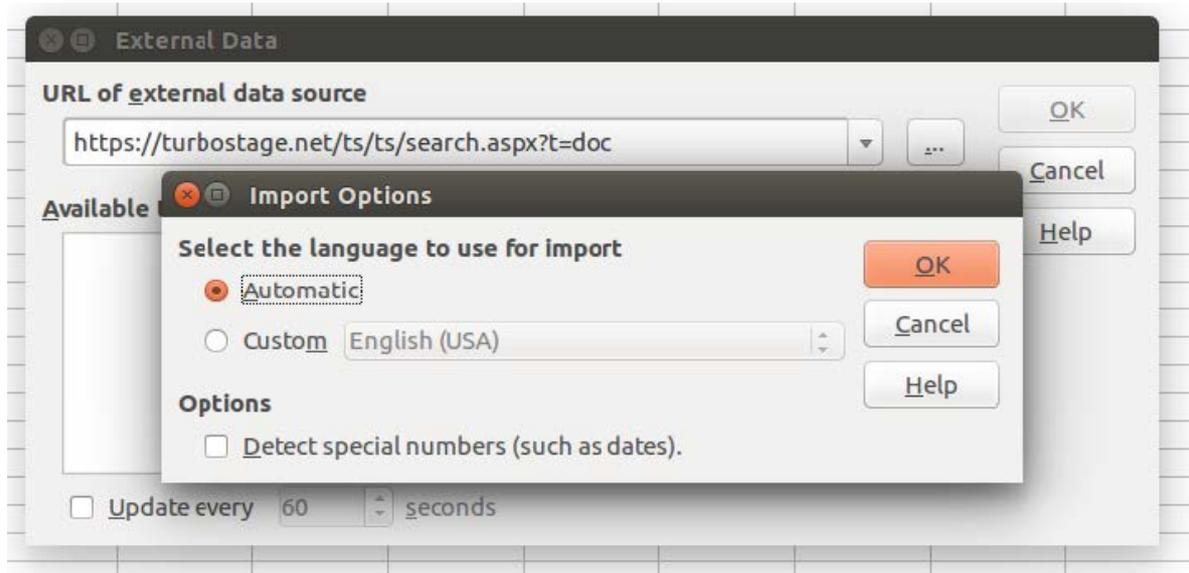
2) In the destination spreadsheet, go to the menu pane Insert > Link to External data:



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



4) Select **HTML_1** and proceed:

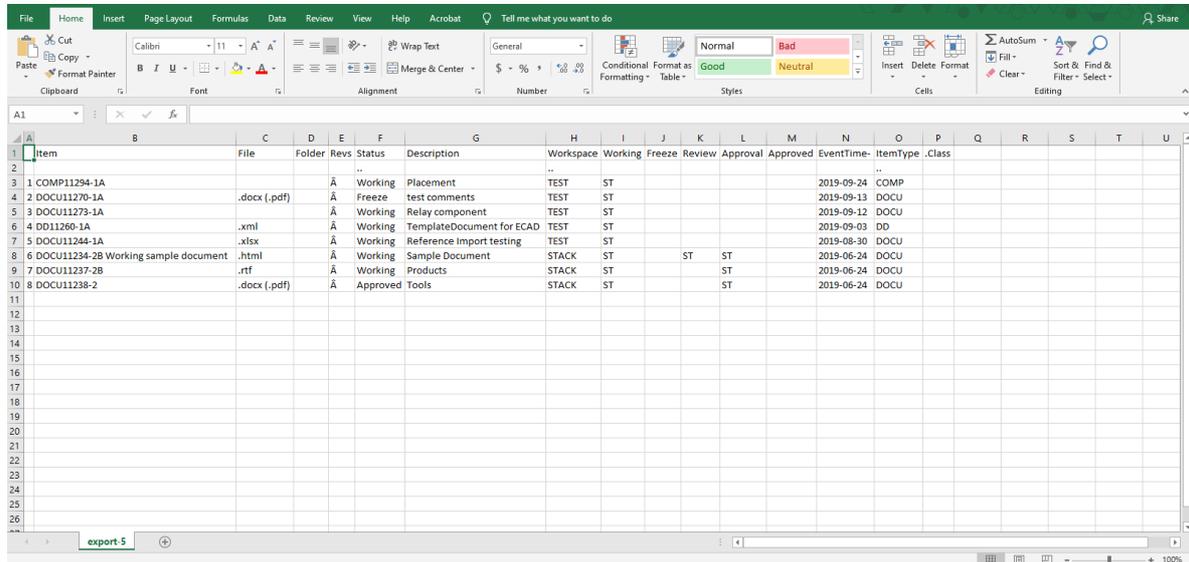


5) Click **OK**.

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:



Notice!

The procedure for using the 'Export text to Excel' is the same as for the 'Export formatted to Excel'. Please refer to [this](#) 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 `.xlsx` 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:

Home Refresh Mail System Reset SK Logout User level: AdminRead View As

You are running as AdminRead

Grid export data and files to zip file

DOWNLOAD

Separate folders

Attached Files 3/245

CLEAR ** *.ai *.css *.csv *.docx *.eot *.gif *.graffle *.html *.jpg *.md *.pdf *.png *.svg *.tif *.txt *.woff *.woff2 *.xlsx

To attach files you must select/check files in table below or click file extension buttons above.

Type	Object	Description	Files
doc	DOCU2184-3	Searching in Highstage	<input checked="" type="checkbox"/> DOCU2184-3.html <input checked="" type="checkbox"/> DOCU2184-3.md <input checked="" type="checkbox"/> DOCU2184-3.pdf <input type="checkbox"/> Highstage/highstage_footer.png <input type="checkbox"/> Images/content-example.png <input type="checkbox"/> Images/content-grid.png <input type="checkbox"/> Images/lex-wildcard-2.PNG <input type="checkbox"/> Images/lex-wildcard.PNG <input type="checkbox"/> Images/lexclusive-example.PNG <input type="checkbox"/> Images/extra-options.png <input type="checkbox"/> Images/global-search.png <input type="checkbox"/> Images/inclusive-example.PNG <input type="checkbox"/> Images/query-example-combined.PNG <input type="checkbox"/> Images/query-example.PNG <input type="checkbox"/> Images/search-and.PNG <input type="checkbox"/> Images/search-column-content.png <input type="checkbox"/> Images/search-file-content.PNG <input type="checkbox"/> Images/search-filters-2.PNG <input type="checkbox"/> Images/search-filters.PNG <input type="checkbox"/> Images/search-not.PNG <input type="checkbox"/> Images/search-overview.png <input type="checkbox"/> Resources/search-illustrations.ai
doc	TN11379-5	Advanced builtin parameters not found in ts_parameter table	<input type="checkbox"/> TN11379-5.html <input type="checkbox"/> TN11379-5.md <input type="checkbox"/> TN11379-5.pdf <input type="checkbox"/> Highstage/highstage_footer.png <input type="checkbox"/> Resources/TN11379-5.docx <input type="checkbox"/> Resources/TN11379-5.pdf
doc	UMA11817-1C	Export to Excel	<input type="checkbox"/> UMA11817 Index.md <input type="checkbox"/> UMA11817.md <input type="checkbox"/> Highstage/highstage_footer.png <input type="checkbox"/> Images/excel-export-1.PNG <input type="checkbox"/> Images/excel-export-2.PNG

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 .

