Excel 2007 for Banner
October 25, 2007

Some Excel features are handy when downloading data from WINGS Express Finance:

Download results from WINGS Express Finance to Excel

- Click the **Download button** near the bottom of the web page you wish to download in WINGS Express Finance. (Note that this downloads all the information related to the Finance query, not just the rows displayed).
- At the File Download pop-up window, click **SAVE**.
- Browse to the **location** you would like to save the results & edit the ___.csv **filename** as you would like. Then click **SAVE**.
- Once the download is complete, you can then use Excel to **open** the .csv (comma separated value) file.
- Do **OfficeButton/SaveAs** to save the file as a ____.xlsm macro-enabled Excel workbook.

Macros

- Excel macros can be defined to automate routine tasks. E.g. rather than having to reformat data each time you do a download, you can create a macro to do these tasks which you can then run whenever you need.
- To create a macro, bring up a spreadsheet that you wish to format.
- The first time that you use Macros at your particular pc, you will need to do:
    - OfficeButton then click ExcelOptions button
    - Click Popular Category to Show Developer ribbon. Click OK.
- Then select **Developer/Record Macro** from the menu ribbon.
- In the pop-up menu, **name** your new Macro (hint – if you name the macro the same as the screen from which you download e.g. Transaction Detail then it will be easy to remember). Make sure you select **Personal Macro Workbook** in the "Store Macro In" box – as this will assure that the macro is available for you whenever you try to run it from your desk. You may type in an optional description.
- At the bottom left of your Excel window, a rectangular icon should appear to let you know that Excel is recording your keystrokes.
- Go ahead & format the Excel file as you would like. (E.g. bold the row with your column headings, format the dollar columns to display $, etc).
- Once you are done recording, just click on the icon in the lower left.
- The next time you download raw data, you can then use **Developer /Macro/Macros** to select your macro & **run** it to repeat the formatting steps you recorded.

Sort by a particular column

- **Hilite** the data you wish to sort.
- From the menu, select **Data/Sort**.
- In the pop-up window, select the **column**(s) you wish to sort by. Then click **OK**.
- You can use the Undo button if the result is not what you desired.

Subtotal

- **Hilite** all the headers & data in your worksheet.
- From the menu, select **Data/Subtotals**.
- In the Subtotals pop-up box, select
  - At each change in: the **column** that indicates when to subtotal (e.g. Acct).
  - Use function: e.g. select **SUM**
  - Add subtotal to: check the **columns** you want (all the $ columns).
  - Click **OK**.
- New rows appear with subtotals. Clicking the 1/2/3 boxes near the upper left of the worksheet allow you to drill down or up. E.g. clicking 2 shows just subtotals.

Autofilter

- **Hilite** the row that has the column headings for your data.
- From the menu, **select Data/Filter**.
- There is now a down-arrow that appears next to each column heading. If you click the **down-arrow** for a column you may select one of the values. E.g. if you click the down-arrow of a rule code column & select the BD01 entry from the drop-down list then only the rows with BD01 will appear.
- Once you make a selection for a column, the down-arrow appears blue.
- To get all of the data rows to re-appear, click the down-arrow & select ALL.
- You may use the Custom choice in the drop-down menu to type in criteria for a column.