

Converting Reports to Excel Using the Text Import Wizard

Download the Report from Identifi:

1. From Search Results, use the Download icon to download the report (pending permission):

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Alternately, use the Download icon within the Document Detail Viewer:

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The file will download as a .txt or .prn file.

Name		Туре	
CO_DPNEW DEPOSIT NEW ACCOUNTS	2023_08_03.txt	Text Document	
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2. Open a blank document in Microsoft Excel. Select *File -> Open* and browse out to open the downloaded file.

- 3. The Text Import Wizard will open:
 - a. At Step 1, click "Next."

Text Import Wizard - Step 1 of 3			?	\times
The Text Wizard has determined that your data is Fixed W	idth.			
If this is correct, choose Next, or choose the data type that	t best describes your dat	a.		
Original data type				
Choose the file type that best describes your data:				
 Delimited - Characters such as commas or t 	tabs separate each field.			
Fixed width - Fields are aligned in columns wi	th spaces between each f	ield.		
Start import at <u>r</u> ow: 1 File <u>o</u> rigin:	437 : OEM United State	25		\sim
My data has headers.				
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2 Bank: COCC Test Institution	From	Deposit New Acco	unts	-
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5 Queue Number : 11091 6 Application Number: 4000505				~
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b. At Step 2, click "Next." (Do not adjust the columns)

ext Import Wizard - Step 2 of 3					? ×
iis screen lets you set field widths (column breaks).					
nes with arrows signify a column break.					
To CREATE a break line, click at the desired position					
To DELETE a break line, double click on the line.					
To MOVE a break line, click and drag it.					
Data preview					
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Bank: COCC Test Institution Report: CO_DPNEW Queue Number : 11091 Application Number: 4000505	10	60 Deposit New 08-03-2023	70 Account Thru: 08	80	Einish

c. At Step 3, click "Finish." (Do not adjust the columns)

Text Import Wizard - Step 3 of 3				? ×
This screen lets you select each column Column data format	and set the Data Format 'General' converts nun values to text.	neric values to numbers, dat <u>A</u> dvanced	e values to dates, and a	ll remaining
Data <u>p</u> review				
GenerGeGeneraGeneGeneral Bank: COCC Test Institut Report: CO_DPNEW Queue Number : 11091 Application Number: 400050	General ion 5	General Deposit From: 08-03-20	General New Accounts 23 Thru: 08-03-20	23



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4. The document text will be converted into columns, and the document can be adjusted as needed.



Downloading Multiple Reports from Search Results:

To select multiple reports and mass download selected files into a Zip folder, select the desired reports and use the Download button in the Menu Bar. A prompt will display with the option to include Notes.

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		Cancel

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Open the Zip folder to display the selected reports:

Name	Туре	Compressed size	Password p	Size	Ratio	Date modified
CO_DPNEW DEPOSIT NEW ACCOU	Text Document	2 KB	No	10 KB	87%	8/4/2023 3:02 PM
CO_DPNEW DEPOSIT NEW ACCOU	Text Document	2 KB	No	10 KB	87%	8/4/2023 3:02 PM

Follow instructions as above from Step 2, opening each document into a separate Excel Workbook or File.