Exporting Producer Manager Inquiry Results to a Spreadsheet

Some inquiries in Producer Manager automatically generate as a spreadsheet. For inquiries with this option, you simply click the **Spreadsheet View** checkbox, generate the inquiry, and the results of your Producer Manager inquiry will open in a tabular format – which many users prefer for filtering, sorting, data manipulation, and analysis purposes.

However, this feature is not available with all inquiries. So what do you do when you want to convert inquiry results to Microsoft® Excel®? Although clicking the **Excel** button on the **Recent Reports** page will generate an Excel file, we do not recommend its use. Instead we recommend an easy method that exports the data from an inquiry's native HTML format to a custom-formatted spreadsheet. Here's how…

Choose an Inquiry to Export

First, open your inquiry results in the native HTML format in the **Inquiry Output** window. Do this either by clicking the **View/Refresh Report** button on the inquiry criteria page to generate a report "on demand," or by submitting the inquiry to generate offline and clicking the inquiry name on the **Recent Reports** tab (*Inquiries>System Information>Recent Reports* tab).

In this example, we'll use the **Producer Licenses Inquiry**, which we have generated offline and is available on the **Recent Reports** tab.

On the **Recent Reports** tab, DO NOT click the **Excel** button in the **Download** column that is associated with the inquiry you want to view. Instead, click the inquiry name in the **Name** column to open it up in HTML format in the **Inquiry Output** window.
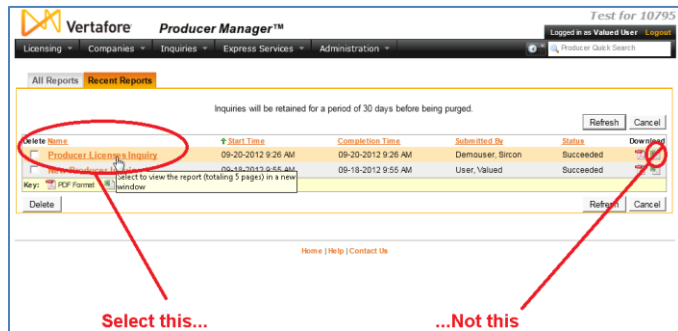

With the inquiry results open in the **Inquiry Output** window, click the **Search** link in the toolbar at the top of the window.


Tip: It may help to think of this as a "Report within a report." You will be identifying information in the HTML inquiry results that you will be using to build a customized, Excel spreadsheet or .CSV file.

Build Your Excel Export File

Click the **Search** link to open the **Search Panel** on the left in the window.
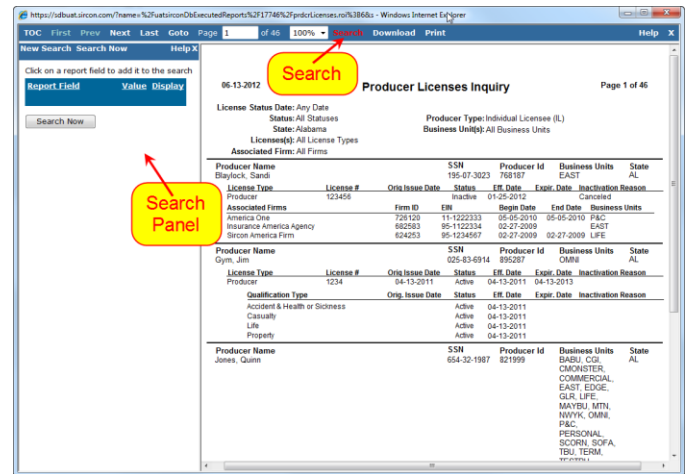
Mouse over the information in the HTML results. Mouse over the actual field values, not the field names. Notice how the cursor (⇖) turns into a hand (✋). A tool tip
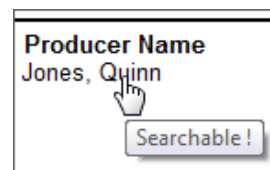
indicates that the information is "searchable." When that happens, you know the information type that you are mousing over can be exported to Excel.

Click a searchable field value to include the field in the **Search Panel** on the left.

Select all categories of information you'd like in your export spreadsheet. In this case, we want to build an Excel spreadsheet that includes Producer Name, License Type, License Number, State, and Business Units.

The order in which you select the fields to appear in your report will determine the column order in the spreadsheet (e.g., Producer Name will be Column A, License Type Column B, etc.)

Note: As you can see in the screenshot below, only the data field name appears in the **Search Panel**, not the actual data that you clicked. For example, the data field, "Producer Name," will appear in the **Search Panel**, and not the actual name of the producer. Be aware that what you are doing right now is selecting categories of information to export to your Excel spreadsheet.
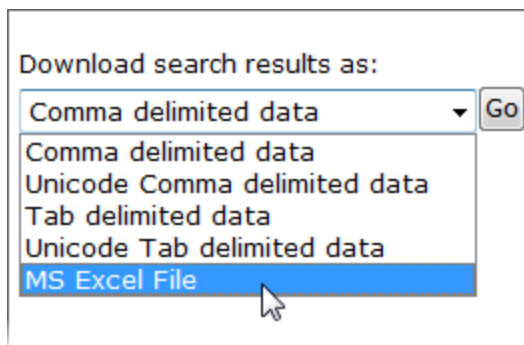
Once you've selected all the data fields you want in your spreadsheet, click the **Search Now** button.
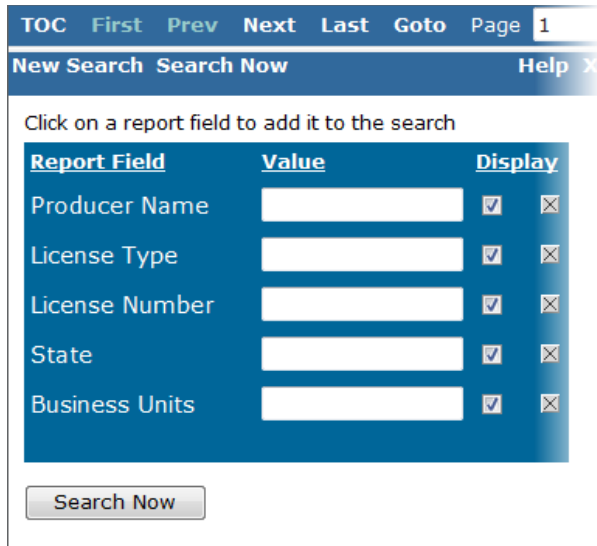
Convert to Excel

All data types you've selected will display in the **Search Panel**.

At the bottom of the panel, find the **Download search results as:** dropdown menu. Select MS Excel File from the menu, and then click the **Go** button.


Need More?

If you need further assistance with Vertafore Sircon products or services, contact your assigned account representative, send an email to plmsupport@vertafore.com, or open a case in the Self-Service Portal.

Note: You may choose any format from the dropdown menu, but in this example we are only creating an Excel file.

You're Done!

Your computer will ask what you'd like to do with the file. You may choose to save it to your computer, or open the file. Either way, you have a nicely formatted Excel spreadsheet that contains the same information that was in the original HTML file. But now it is formatted in a way that you may find easier to use or digest. You now can work with the results just as you would any other Excel spreadsheet.
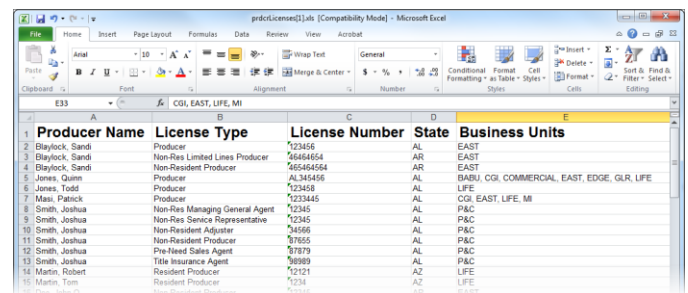
Additional Benefits

Once you have the report in an Excel spreadsheet format, you can use this report as the basis for upload files in Sircon Producer Manager, such as Quick Load with Sync or Bulk Appointments, Bulk Terminations, or Business Data Update files, if you are using Sircon Producer Express.