



How to copy and paste into CP from Excel:

CP allows you to copy and paste information from Excel into certain reports. This is useful for the reports used to enter budget and forecast information, where you may have a large amount of information to enter. This functionality allows you to export the report to Excel, work on the figures offline and then paste the information back into the report in CP in one whole chunk.

1. **Display the report** (refer to the 'How to Run Standard Reports' user guide).
2. **Change the time slider to the budgeting year**, so if entering 2017/18 budget information you would move the slider position to 2017/18.
3. **Click the *Spreadsheet View* icon at the top left of the toolbar.** 
4. **Click the *Excel Export* icon.**
5. The report is now exported to Excel, with a filename beginning *cpYYYYMMDD*.
6. **Make the amendments required to the numbers in the Excel file.**



Numbers only need to be amended on lines with black text. Lines with grey text are subtotals of the lines above which CP will automatically update.

7. **Copy all the numbers in the Excel file** (excluding column headings and row titles) **using *Ctrl + C***.
8. **Click in the first number in the report in CP and paste the information from Excel using *Ctrl + V***.
9. Once entered, **click on the *Layout View* icon at the top left of the toolbar.** 