# Exporting Workpapers

Complete the following tasks to export an Audit Workpaper record to Microsoft Excel.

On this page

* [Before you begin](#Beforeyoubegin)
* [Task 1: Access the Audit Workpaper](#Task1AccesstheAuditWorkpaper)
* [Task 2: Select fields to export](#Task2Selectfieldstoexport)
* [Task 3: Export the data](#Task3Exportthedata)
* [Task 4: Access the exported Excel file](#Task4AccesstheexportedExcelfile)

## Before you begin

Verify that your Archer user profile has an email address. This is a requirement to be able to export Workpaper records.

## Task 1: Access the Audit Workpaper

1. Navigate to an Audit Workpaper record.
2. In either View or Edit mode, Click Ellipsis, and select Export to Excel. The Select Export Data window opens.

## Task 2: Select fields to export

The Select Export Data window displays all applications, levels, and sub-forms associated with the Workpaper record and groups them into sections. Each section displays all active fields and both on-layout and off- layout fields. When you select a field in a section, the system automatically adds a tracking ID for the field. You can remove the tracking ID, however the ID is useful for organizing data. You must select a minimum of 1 field to export; Archer does not limit the number of fields that you can export. You cannot view and select fields for which you do not have access; if the window does not display fields that should be available for selection, review your user permissions.

1. In the Available list, expand the sections to see the available fields.
2. Select the fields to export. Archer allows you to export [13 different supported field types](am_audeng_export_supported_fields.htm) from Workpaper records to Excel.
3. (Optional) Do 1 or more of the following:
   * To remove fields from your export, click Close to the right of the field in the Selected list.
   * To reorder the fields in the Selected list, click a field and use the Up and down arrows to move it up or down in the list.

* **Important:** Fields can only be reorganized within their sections. Fields from different sections cannot be combined.

## Task 3: Export the data

1. Click Export. The user receives an email stating whether the export was successful. Use notification reports in Archer to track the status of the email notification.
2. Review the email received.
   * If the export was successful, go to Task 4.
   * If the export was unsuccessful, review the errors when attempting to export the Workpaper record listed in the email. The user must correct the errors and export the Workpaper record again.

## Task 4: Access the exported Excel file

The user who initiated the Export in Task 3 receives an email from Archer containing a link that directs the user to the Archer file repository to download the Excel file.

**Important:** Access to the link contents is limited to the user credentials that exported the Workpaper record.

For more information on the format of the exported file, see [Exported Excel File Structure Guidelines](am_audeng_export_file_structure.htm).