Report Export Options

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Click the **Export** button to export a report to one of the following:

- Excel Spreadsheet (XLS)
- Comma Separated Values (CSV) Plain text files that contain a comma after each entry. <u>CSV files</u> can generally be imported into any spreadsheet file or database regardless of the type of software or computer you are using.
- Portable Document Format (PDF) PDF is the standard for the exchange of documents across different formats.

When a report has *Search* fields in the column headers, you'll be offered options after clicking the *Export* button.

Search fields mily Advanced Search								
< Return								
View 1 - 13 of 13								
Loc 🗢	Family	Balance	Status	Address		City	State	Zip
Search	Search	Search	Search	Search		Search	Search	Search

Export Data 🗙
Select export option:
All grid data
Filtered grid data
Filtered and paged data
Select export format: Excel Spreadsheet (XLS) Excel Spreadsheet (XLS) Comma Separated Values (CSV) Portable Document Format (PDF)
Export Data Cancel
Export Data Cancel

- All grid data exports the entire report (all pages, all data) regardless of whether you have used a Search field.
- *Filtered grid data* exports only the results displayed after using a Search field.
- *Filtered and paged data* exports only the page you are viewing (assuming there are multiple pages of data) as well as the results displayed after using a Search field.

Select the export format in the *Export Data* pop-up box.



The ability to export information is controlled by theExport Grid Information user permission located in theGeneral category.