

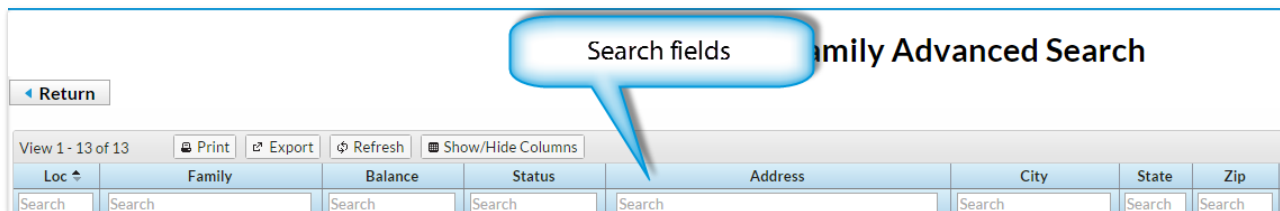
Report Export Options

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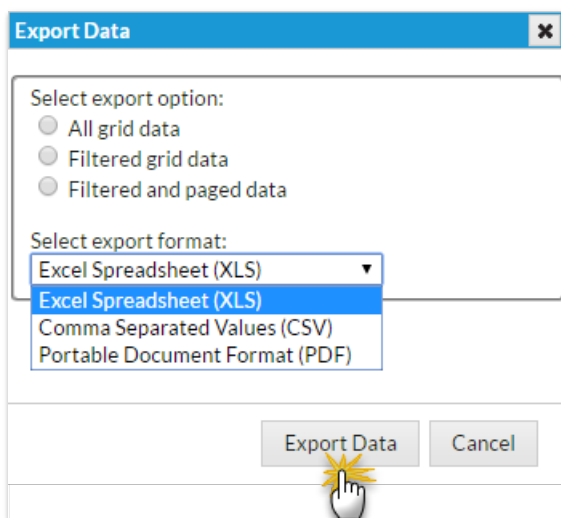
Click the **Export** button to export a report to one of the following:

- Excel Spreadsheet (XLS)
- Comma Separated Values (CSV) - Plain text files that contain a comma after each entry CSV files 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.



The screenshot shows a report interface with a search bar at the top. A callout bubble points to the search bar with the text "Search fields". The report table has columns: Loc, Family, Balance, Status, Address, City, State, and Zip. Each column has a search field below it. The "Export" button is visible in the top toolbar.



The "Export Data" pop-up box shows the following options:

- Select export option:
 - ☐ All grid data
 - ☐ Filtered grid data
 - ☐ Filtered and paged data
- Select export format:
 - Excel Spreadsheet (XLS) (selected)
 - Comma Separated Values (CSV)
 - Portable Document Format (PDF)

Buttons: 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 the **Export Grid Information** user permission located in the **General** category.*

