



How to export standard reports to Excel:

All of the standard reports can be exported to Excel. This can either be done once the report is displayed, or directly from the Organise Reports menu.

Exporting once the report is displayed:

1. Display the report



Refer to the [How to View Standard Reports](#) user guide.

2. Navigate to Tools > Export Data

3. In the Target menu, ensure Excel is selected

4. Click Browse to select a location to save the export to and to name the file.

5. Ensure the File Type is set to Excel 2007 and above (*.xlsx)

6. to sheet is the name of the tab that the report will be exported to. **Give the tab a name.**

7. Ensure the following tick boxes are ticked:

- a. With layout
- b. Warning on overwrite
- c. Start Excel after export

8. Click OK.

Exporting directly from the Organise Reports menu:



You must set the slider position to the required period before exporting. Refer to the [How to use the Time Slider](#) user guide.

9. Navigate to Reporting > Organise Reports.

10. Select the report you wish to export.

11. **Click *Export* from the menu on the right hand side.**
12. The parameters you are able to run the selected report for are displayed.
13. **Select the required parameter and click *OK*.**
14. In the *Target* menu, **ensure *Excel* is selected.**
15. **Click *Browse*** to select a location to save the export to and to name the file.
16. **Ensure the File Type is set to *Excel 2007 and above (*.xlsx)*.**
17. *to sheet* is the name of the tab that the report will be exported to. **Give the tab a name.**
18. **Ensure the following tick boxes are ticked:**
 - a. **With layout**
 - b. **Warning on overwrite**
 - c. **Start excel after export**
19. **Click *OK*.**

