How do I export a report?

22/04/2025 12:18 pm AEST

Overview

Administrators have the ability to send themselves a CSV export of any of their custom-built reports by email, using the Report Output section of the report builder. This gives administrators greater flexibility in manipulating their reports to suit their needs.

Step-by-Step

Step 1: Access the Reports Tab

In the left-hand menu, select REPORTS

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Step 2: Select the report type

Find the report you want to run, then click CONFIGURE

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Step 3: Build your report

Use the fields in the left-hand menu to build the report

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ن ج چھ	Choose a field from the left column and drag it into the Selected f Different types of fields are available from different field groupine Click the Run Report' button to execute the report.	Fields box (the box will expand to fit your fields). gs. Click the heading to open the group.		
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Ø	Active Record	Date of Birth	Filter :	Remove
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Step 4: Choose your report output and format

In the **Report Output** area, select the **EMAIL** option and choose your desired output format; **Tab Delimited** or **CSV**. As an administrator, your email address will be pre-populated and cannot be edited

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Step 5: Run the report

Select the **RUN REPORT** button to trigger the email to be sent to your inbox

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You'll then see a confirmation message noting where the data has been sent



Your report will then arrive in your email inbox with the attached file ready to download

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Watch

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