EXPORT USER GUIDE

1. HOW TO EXPORT

The following is a quick guide on how to export the dashboard reports.

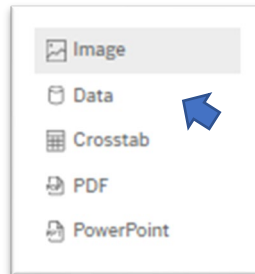### 1.1. **Click on the Download Icon**

Locate a toolbar at the bottom of the page and click on the **Download** icon.

1.2. **Select File Format**

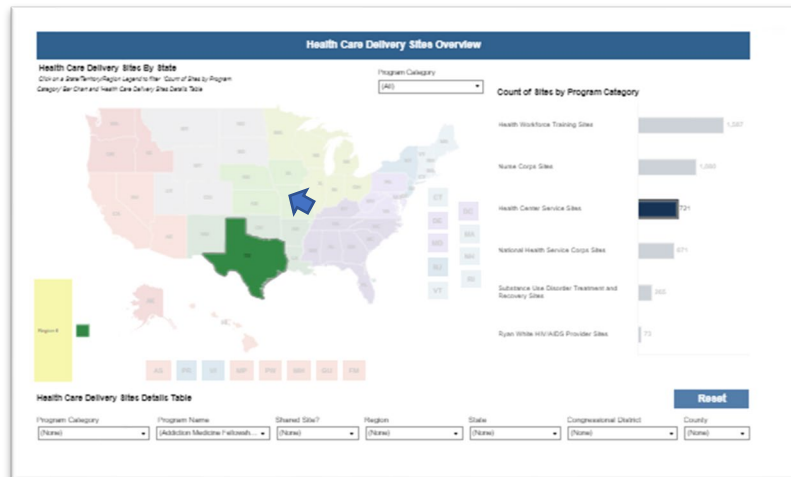The buttons on the Download menu, allow users to export the report and its data.

- **PDF:** A user can download the current dashboard or the entire report as a PDF, allowing you to print what you see

- **Image:** This allows a user to save an image of the current graph (with filters). (You may need to click a 2nd time)

- **PowerPoint:** A user can download the current dashboard or the entire report as a PowerPoint, allowing you to print what you see.

- **Data** (restricted): The data feeding the report will open in a new window. This data can then be downloaded as a text file.

- **Crosstab** (restricted): Transfer the data from the dashboard into Excel by selecting any of the data from the report.

- **Data/Crosstab** Export (If not restricted): Transfer the data from the dashboard to your local machine by selecting any of the data from the report. The data feeding the report will open in a new window.

# 2. EXPORTING DATA/CROSSTAB TO EXCEL (If not restricted)

You can export data using the Data option on the Download toolbar button. Select the appropriate filters from which you would like to download the underlying data.

2.1. Click/Tap the dashboard (pie chart, bar chart, Text Table, Map, etc.). Note: For text table please tap the header of the table.
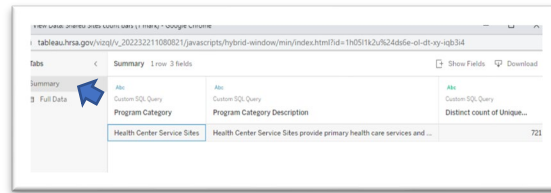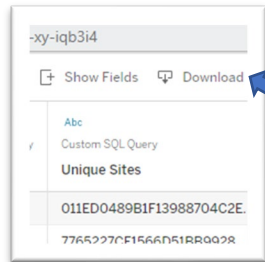

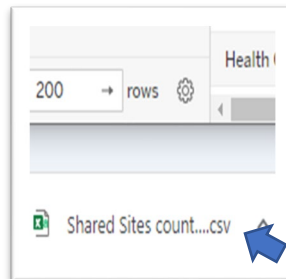2.2. By following previous step (a) the Data/Crosstab option from the "download" button will become selectable.
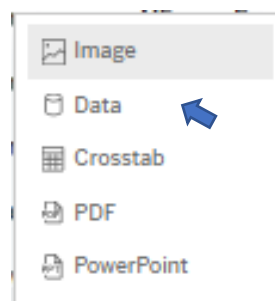
2.3. A window will open, and you can select the summary data option or choose to download the full data

2.4. Select download option to download the data to your local machine.


2.5. Open the downloaded file
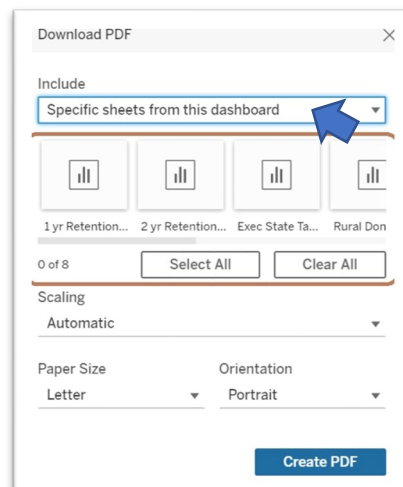
3. EXPORTING TO PDF

You can quickly export all or part of a dashboard using the PDF command on the Download toolbar button. You can select your PDF orientation, paper size, and choose whether to print the entire dashboard views or selected sheets.

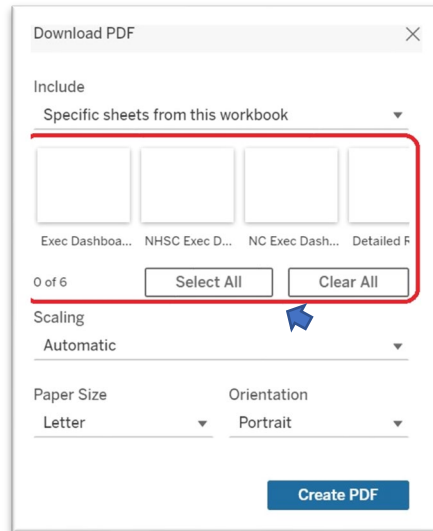3.1. From the Download menu, select **PDF.**

3.2. Select Content. Choose whether to export to PDF the current dashboard view, selected components from the current view, or selected views by doing one of the following:
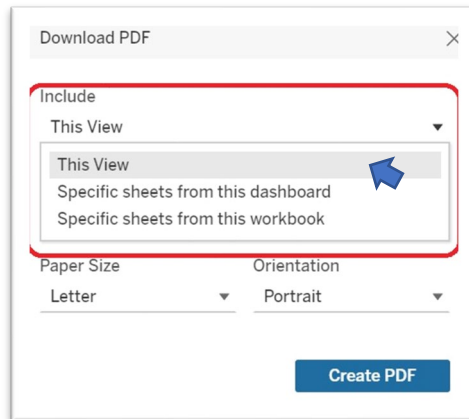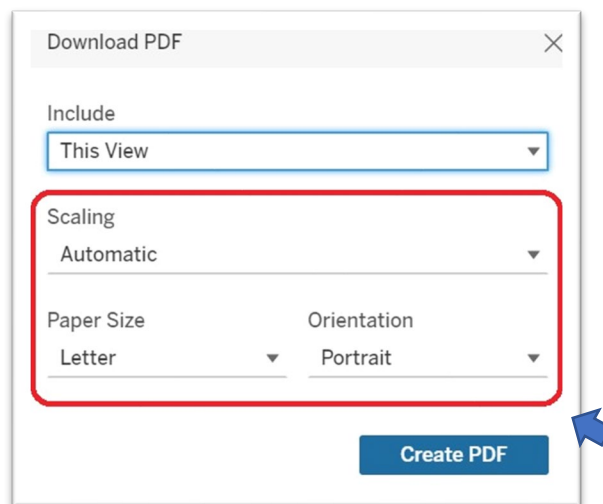

- Choose **This View** to export content to PDF only from the currently displayed dashboard view.

- Choose **Specific sheets from this dashboard** to export to PDF data from selected components (e.g., tables, bar charts, graphs, maps, etc.) from the currently displayed dashboard view. **Instructions:** Click on the components you want to export data from.

- Choose **Specific sheets from this dashboard** to export PDF data from one or more dashboard views. **Instructions:** Click on dashboard views you want to export data from.

3.3. Choose a Layout and Paper Size. Select **Scaling**, **Paper Size**, and **Portrait** or **Landscape** orientation option.


3.4. Generate the PDF. In the Download PDF dialog box, click **Create PDF** to export content to PDF file.

4. EXPORTING TO POWERPOINT

You can quickly export all or part of a workbook using the PowerPoints command on the Download toolbar button. You can choose whether to print the entire workbook or selected sheets.

4.1. From the Download menu, select **PowerPoint.**

4.2. Select Content. Choose whether to export to PowerPoint the current dashboard view, selected components from the current view, or selected views by doing one of the following:
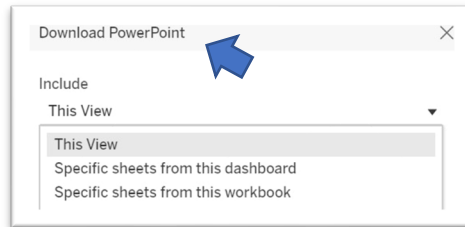
- Choose **This View** to export content to PowerPoint only from the currently displayed dashboard view.

- Choose **Specific sheets from this dashboard** to export to PowerPoint data from selected components (e.g., tables, bar charts, graphs, maps, etc.) from the currently displayed dashboard view. **Instructions:** Click on the components you want to export data from.
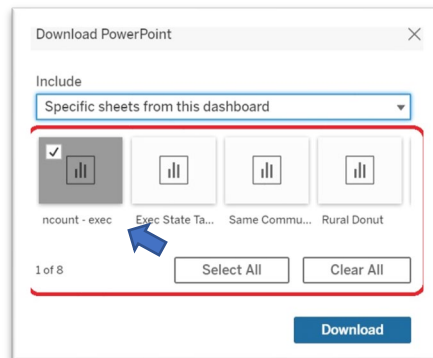
- Choose **Specific sheets from this dashboard/workbook** to export PowerPoint data from one or more dashboard views. **Instructions:** Click on dashboard views you want to export data from.
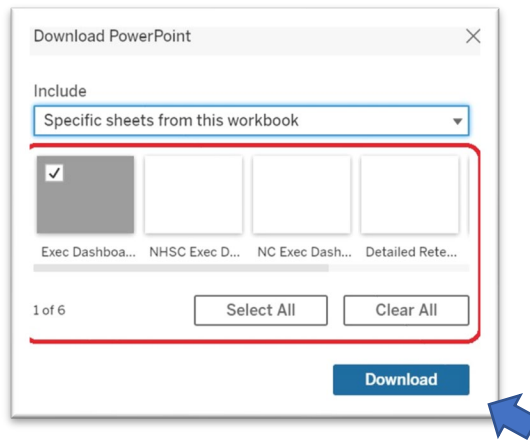
4.3. Generate the PowerPoint. In the Download PowerPoint dialog box, click Download to export content to PowerPoint file.