DataPoint Tips:
Did You Know...

Exporting Reports in Various Formats

With DataPoint, you can export your reports into common file formats such as PDF and Excel to make your analysis easier.

Steps to Export Reports

Follow the steps below to export a report:

1. Navigate to the desired report or dashboard and click *Export* in the top right of the page.

2. Complete the required fields in the *Export Settings* box by entering the following details and clicking the *Export* button at the bottom of the page.

Password – Create a password to view the export (optional).

Export – Use the dropdown to select *Report Only* or *Chart Only*.

Data Format – Use the dropdown to select to export the data as displayed on the screen or with expanded rows that include additional data.

Repetition and Start Date – For reoccurring reports, select frequency and enter the start date for your reporting. We recommend scheduling after the 15th of each month to account for the monthly load.
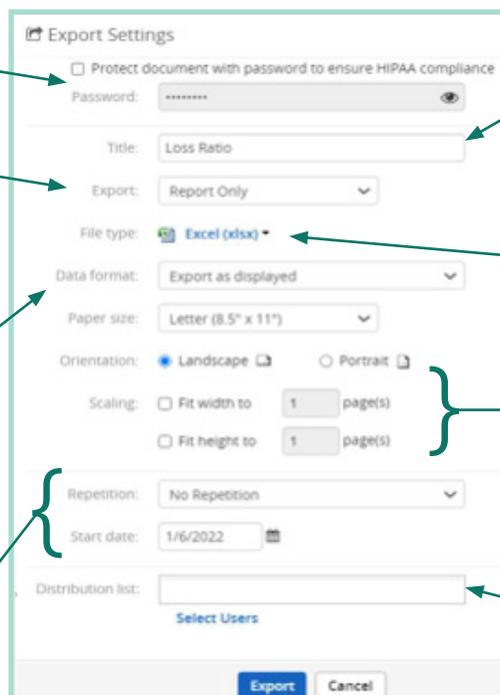
Title – Enter a name for the exported file. Include a date to the end of the file name (e.g., 20220106).

File Type – Choose your preferred file type - Excel, PDF, CSV, or Access.

Orientation and Scaling – Choose the desired formatting for the export if you would like to print it.

Distribution List – Enter the usernames of those that need to receive the report or choose from the list of users that have access to this tool by clicking *Select Users*.

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