E-mailing and Exporting Reports

You can e-mail and export reports in various formats such as PDF files and Excel® spreadsheets. All reports can be exported using the Print to File option from the Print menu. Some reports also have a Data View option that you can export from in formats such as Excel and Microsoft Access®.

ACS OnDemand

Files exported within the OnDemand environment will open in OpenOffice instead of Microsoft® Office.

1. In the reports window, select the report you want to e-mail.
2. **Optional:** If the report is a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. Click **Customize**.
4. Select the appropriate report options, then click **Preview**.
5. On the reports toolbar, click **E-mail Report** .
6. Select the file format you want to email the file as.
7. An options window displays. The available options differ depending on your selection.
8. Select your settings, then click **OK**. Your default e-mail client opens with the report attached.

Exporting to Excel

When exporting to Excel through the Print to File option, the headings display on every page. When exporting to Excel from the View Data window, the headings display at the top of the first page.

1. In the reports window, select the report you want to export.
2. **Optional:** If the report is a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. Click **Customize**.
4. Select the appropriate report options, then click **Preview**.
5. On the reports toolbar, click **Print Report** .
6. In the options window, select **Print to File**, then select the file **type** in the drop-down list.
7. To select the location where the file is saved, click **Browse** .
8. Navigate to the location and click **Save**.
9. Depending on the file type, another options window may display. Select your options and click **OK**.
10. Click **OK**.

Note

This option is only available on some reports.

1. In the reports window, select the report you want to export.
2. **Optional:** If the report is a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. Click **Customize**.
4. Select the appropriate report options, then click **Preview**.
5. On the reports toolbar, click **View Report Data** .
6. Click the arrow beside **Export**, then select the file type.
7. Select the location to save the file and enter the **File Name**. Click **Save**.