How Do I...
Export My Report to Excel?

Problem

I can't figure out how to print my reports to Excel. Then sometimes after I do export the report to Excel, some of the data is missing or in the incorrect order.

Solution

When running a report in TCM, you can select Excel as one of the formats to export from. When designing the report, you can control how the report exports with more exactness.

Process

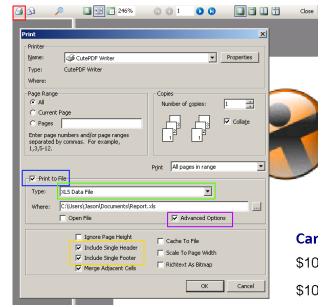### Exporting a Report to Excel

1. To export a report to Excel, click on the **Print** button [RED]. Towards the bottom of the dialog, check the **Print to File** checkbox [BLUE].
2. Set the Type to *XLS Data File* [GREEN]. Other formats are also available.
3. Check **Advanced Options** [PURPLE] for more control as an end user.
   - The Include *Single Header/Footer* [YELLOW] check boxes will output the report as a larger Excel sheet. Without these boxes checked, the Excel file may have multiple "pages" within the rows. When checked the header and footer is not repeated.
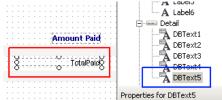4. Click **OK** and the file will be exported instead of output to a printer.

How Do I...

Configuring a Report's Export Options

1. Open your report for editing in TCM (Right click on the report and choose **Design**)
   - For this example, "F4 - Donor Listing" will be used.
2. Go to **File → Save As** and give it a new name. This will prevent any accidental loss of the standard reports.
3. In order to rearrange the columns, first identify what the field names are in each section of the report.
   - In this case the *TotalPaid* [RED] field is called *DBText5* [BLUE]. A click on *Amount Paid* would reveal the name of the Label. NOTE: It may not be the same number (*Label5*) depending on how the report was built.

4. Once the fields on the report have been identified, go to **File → Print to File Setup**.
5. For each Band [BLUE], the **Available Controls** [RED] can be moved over to the **Selected Controls** [GREEN] using the *Add/Remove* arrows [PURPLE].
6. Reorder the fields with the *Up/Down* buttons [ORANGE].

NOTE: When choosing TEXT as the file format instead of Excel, the file structure can be defined as well using the File Type [PINK] dropdown.