Utilizing Export Data Request

Last Modified on 10/21/2024 12:48 pm EDT
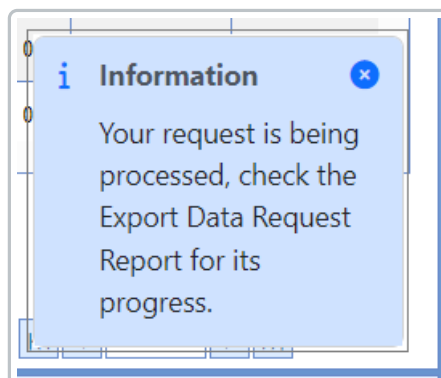
Utilizing Export Data Request Tool

Generating a export file;

1. Go to any table search control window (ex. Appointment report).
2. Perform your query.
3. Once you have your results click the gear icon on the right upper corner of the window.
4. Click Print.
5. Select the "Excel - all pages (Accessible in the Reporting Portal General/Export Data Request)" option.


6. A toast message will appear on the right lower corner of the window informing you that your request is being processed.

Utilizing the Export Data Request to manage your export files;

1. Go to the Reports portal.
2. Under General section select Export Data Request.

3. The Export Data Request window will display the files generated by your user for the current date.
4. Under Action you can choose to download the file or remove the file.
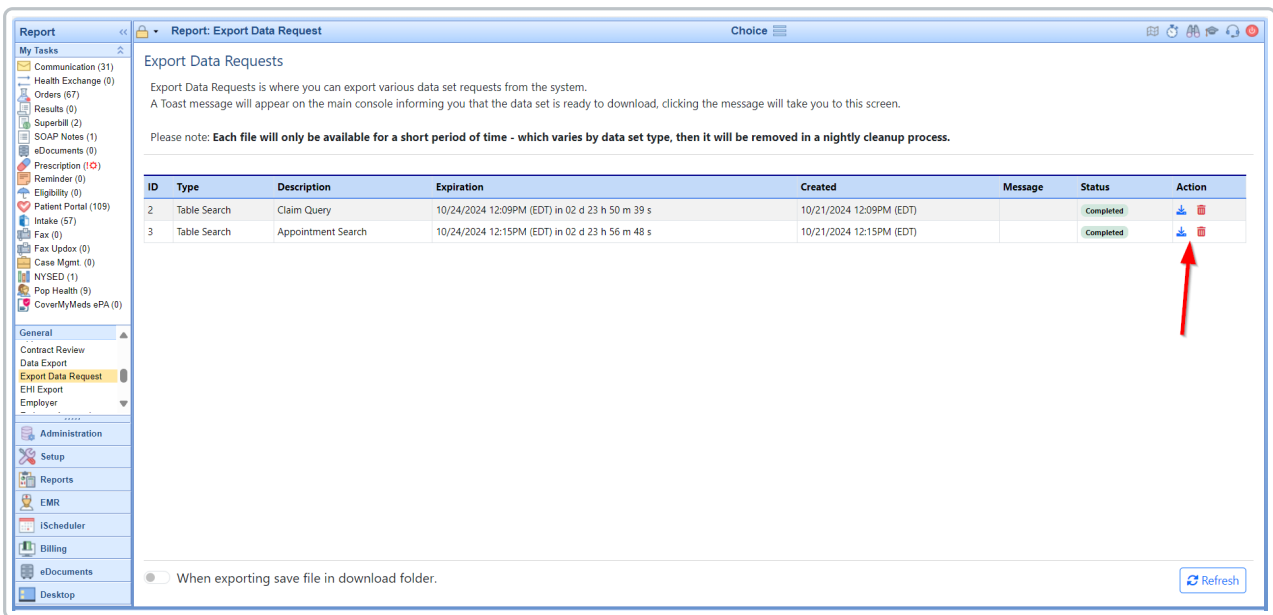
**The refresh on the right lower corner of the Export Data Request window will refresh the list of files including the file status.

**A file may appear with a "In Progress" status if the file is still being compiled. If this occurs refresh until the status reflects as "Completed" prior to downloading the file.