


Unite Education Program v6.3

Job Aid: 5663

Add an Export Report to Unite

Export reports provide a way for you to export data from Unite into a file that you can use to import data into another system. There are two parts to an export report. First, there is the data that you want to see on the report. The fields you select make up the columns in an Excel spreadsheet. Second, there are the conditions that target the right information for your report. The conditions you add determine the data that appears in the rows of an Excel spreadsheet. There are two main steps to add an export report to Unite.

Step 1: Add the report

1. Open a browser and log on to Unite.
2. Click REPORTS.
3. Verify you are on the *Exports* tab.
4. Click  .
5. Verify you are on the *Report Fields* tab.
6. From the **Report Output Type** list box, select what you want Unite to do with the report.

Note

Since you are adding a new report, you may want to select the **Report Preview** or **Quick Count Preview** output type to test your report configuration before selecting an output type that generates an export file.

7. In the **Report Name** text box, enter a name for the report.

8. In the **Search Available** text box, enter the first few characters of a field name you want to include in the report.
9. In the **Available Fields** box, select the check box for the field you want to add.

Note

The **Available Fields** box lists all the areas in Unite where there is a matching field based on what you enter in the **Search Available** text box. Click and expand the sections to find the exact field you want to add.

10. Click **Add Field** .

Note

Each field you add appears as a column in an Excel spreadsheet.

11. Repeat steps 8 through 10 until you have added all the fields you want to include in the report.
12. In the **Selected Fields** box, arrange the fields from top to bottom the way you want the columns to appear from left to right in an Excel spreadsheet.

Note

Drag and drop to move a field.

13. Click **Save** .

Step 2: Select a report condition

1. Click the *Condition* tab.
2. From the **Select Condition List Name** list box, select a condition list for the report.

Note

If there is not an existing condition list you want to use, click **New** to add a condition list. Then enter a name in the **New Condition List Name** text box. A condition list name is required.

3. If you do not want to generate output at this time, click **Save**. If you want to generate output, click **Save and Run**.

Note

You may want to select the **Report Preview** or **Quick Count Preview** output type to test your report configuration before selecting an output type that generates an export file.