



How to Export CFAWin8 System Reports

CFAWin8 reports can be exported to other formats, including PDF, Word, Excel, CSV, HTML and more. Exporting reports enables personnel to share CFAWin8 report data without having to print hard copies of the reports. The exported report files can be saved to a common network directory and/or attached to e-mail.

To Export a System Report:

1. Access the **System Reports** screen.
2. Select the desired **Report Description**.
3. Set the desired **Sort the Record, Options, Select Filters** and **Range Filters** if needed.
4. Set the **Output Destination** to **Display**.
5. Click the **Start** (green traffic light) icon to generate the report.
6. The report preview appears.
7. Click the **Export Report** (gray diskette with paper) icon on the Crystal Viewer toolbar.
8. When prompted, select the desired **Format** and **Destination** (e.g., Format: PDF and Destination: Disk file).
9. Click **OK**.
10. For most formats, an **Export options** window appears.
 - Options here will depend on the format set in Step 8. Set as desired.
 - If PDF is set as the Format in Step 8, clicking the 'Create bookmarks from group tree' checkbox will create bookmarks using the Crystal Reports Group Tree. Group Tree does not have to be visible to use this feature.
 - Set the page range to export. Click All to export the entire report or Click Page Range to From and To page parameters. A single page would be input as n-n, where n= the page number to print.
11. Click **OK**.
12. The **Choose export file** window appears.
13. Browse the **Save In** window and select the destination folder to export the file to.
14. The default File name will appear as the CFAWin8 report File name with the extension for the format chosen in step 8.
15. Enter the user-defined file name for the exported export in the **File name** field. Be sure to keep the appropriate file extension for the format chosen in step 8.

Tip: Meaningful file names are helpful for users (e.g., 2014_04EqCostsbyDept.pdf for a report of April 2014 Equipment Costs by Department) and provide an easy to navigate archive of past run reports.
16. Click **Save**.

Tip: To export reports directly to HTML, Adobe Acrobat PDF or Microsoft Excel without previewing on screen first, set the Output Destination accordingly in Step 4. When using this option, the report file is stored in the CFAWin\Data\User folder of the CFA User Id logged in when the report is exported. The report file and additional options cannot be set, but the report can be renamed via Windows Explorer.