

Exporting from List View

List views show complete lists of different objects in the software that can be sorted and filtered to display more specific information. Lists can be exported to CSV, HTML, Image, MHT, PDF, RTF, Text, XLS, and XLSX file types.

This guide will explain how to export lists.

*Please note that the terminology may vary between implementations. One agency may call Services Activity Session, while another may call them Client Services.

1) Lists can be exported to various file formats from List Views.

2) To export data, right click in the list view and hover the mouse over the Export to option.

Person Type	Client/ File ID	Last Name	First Name	Date Of Birth	Gender
Child			3276	1/1/2014	Female
Child			3228	1/1/2008	Female
Child			2336	1/1/2012	Female
Client	147-15A		3424	2/10/1983	Female
Child			3223	1/1/2006	Female
Child			3216	1/1/2007	Female
Client	159-14		1108	11/29/1988	Female
Client			462	8/15/1978	Female
Child			2335	1/1/2011	Female
Child	09-15A-C4		2278	1/1/2005	Female
Child			1772		Female
Child			3254	1/1/2001	Female
Child			3229	1/1/2012	Female
Child			2101	9/1/2013	Female
Child		3234	3234	1/1/2002	Female
Child		3264	3264	1/1/2011	Female
Client	01-16G	3588	3588	2/20/1974	Female

3) Select a file format.

4) Create a file name and click Save.

Person Type	Client/ File ID	Last Name	First Name	Date Of Birth	Gender
Child			1760		
Child			3426		
Child			3523		
Child			3241		
Child			2334		
Child			1923		
Child			3258		
Child			2314		
Child			3270		
Child			2652		
Child			2329		