

Unite Education Program v6.2

Job Aid: 5636

About Export Reports

In Unite, you can run an export report to see a quick count of records that match the report conditions, schedule a report, preview a report, or generate an output file that you can use to import data into other campus-wide systems. Each time you run a report, the output you select determines what Unite does with the report.

If you want to generate an export file, the following outputs are available.

Output	Description
Comma Delimited File	This output provides a count of returned records and a comma delimited file with a cover sheet.
Fixed Text File	This output provides a count of returned records and a fixed text file with a cover sheet.
Microsoft Excel File	This output provides a count of returned records and a Microsoft Excel file with a cover sheet.
Quote Comma Delimited File	This output provides a count of returned records and a quote comma delimited file with a cover sheet.
Tab Delimited File	This output provides a count of returned records and a tab delimited file with a cover sheet.

If you want to see what a report looks like or generate a quick count of records that match the report condition, you can select one of the following outputs when you run the report.

Output	Description
Quick Count Preview	This output provides a count of returned records.
Report Preview	This output provides a count of returned records and a Microsoft Excel file.

You can also select the **Scheduled** output to set a schedule for Unite to automatically run an export report. The following image illustrates scheduling options you have for export reports.

Schedule Report: Accepted and Enrolled by Location Condition: Whats ✕

Start Date * 📅

End Date 📅

Frequency * ▼

Output * ▼

FileName (no .ext) *

Sent Data to University

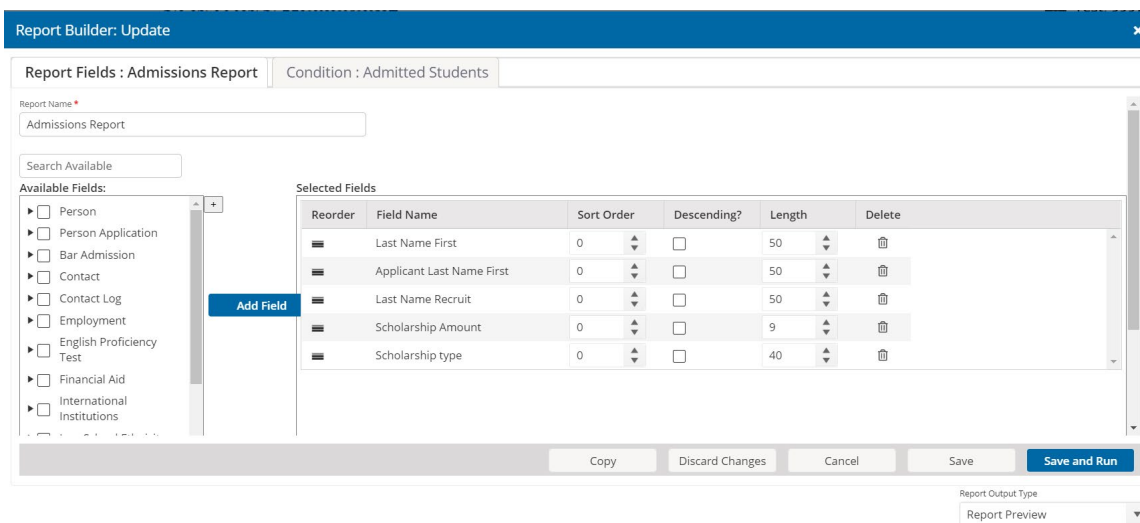
As illustrated in the image below, you work with saved export reports on the *Exports* grid.

HOME	PEOPLE	APPLICATIONS	REVIEWS	REPORTS	UTILITIES	EVENTS	JOURNEYS
Exports Custom Word Power BI Custom Power BI Templates National							
No. of records: 123 / 123							
Drag a column header and drop it here to group by that column							
Report Name	Condition Name	Output	Run	Run Count	Favorite	Ask Conditions	Delete
Applicant data		<input type="text" value=""/>	▶	210	<input type="checkbox"/>		🗑️
Applicants Past Month		<input type="text" value=""/>	▶	2	<input type="checkbox"/>		🗑️
ASo Monitoring		<input type="text" value=""/>	▶	14	<input type="checkbox"/>		🗑️
ASO Test Email		<input type="text" value=""/>	▶	2	<input type="checkbox"/>		🗑️
Attended		<input type="text" value=""/>	▶	29	<input type="checkbox"/>		🗑️
⏪ 1 2 ⏩ 100 items per page 1 - 100 of 123 items							

As long as there is a condition saved with an export report, you can select an output and run the report right from the grid. On the *Exports* grid, you can also see the number of times the report has been run as well as the last user who ran the report.

You can add any number of export reports to Unite, and you can edit and delete reports as needed. For each report, you select the fields and define the conditions to generate the output you want. The fields determine which columns of data are on the report. The conditions determine which records are included on the report. Before you can define report conditions, you must add at least one field to the report. Each export report and report condition must have a unique name for identification.

As illustrated in the following image, the *Report Builder* window provides everything you need to add, edit, delete, and configure fields for an export report.



The *Report Builder* window also provides everything you need to add, edit, delete, and configure report conditions, as illustrated in the following image.

Just as you are able to search and add fields that you want to include on a report, you are also able to search and add fields to define the report conditions. Fields come from person and application records.

There are a number of options you may have after you run an export report depending on the output you select. As illustrated in the image below, the report options for an output that generates an export file include a quick count of the returned records as well as options to download the report, add a contact note to the person record for each person included on the report, and select the **Sent Data to University** option.

At any time after you add an export report to Unite, you can edit or delete the report. You can also create a new report from a copy of a report.