

Saving Reports

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ALERT: Importing and exporting documents is currently unavailable for Cloud practices, and the OP Team is working hard to return the functionality as soon as possible. *The steps in this article are temporarily unavailable.*

You can use the Print to File function in OP Reports to convert reports to other formats. Most commonly, the Print to File function will be used to save reports as a PDF file or an Excel Sheet.



Note: When converting to another format, some data may be lost. PDF is the only format that is guaranteed to keep all information.

1. Open and log into **OP Reports**.
2. Select and run the report that you would wish to export.
3. Once the report has opened in a Print Preview window, click the **Print** icon button in the upper-left corner of the window.
4. Select the **Print to File** checkbox at the bottom of the Print settings pop-up dialog box.
5. Select an option from the **Type** drop-down menu.
6. Click the [...] (ellipses) icon button located next to **Where:** and select the folder where you would like to save the file on your computer.



Note: For Cloud clients: To set a save file location, select Network > TS Client > Users > 'user's name' > Choose location to save file.

7. In the 'File Name' textbox, type a title for the file, then click **Save**.
8. Click the **OK** button on the print window. Instead of the task being sent to your printer, a Setup window will appear.
9. Set any additional preferences on the Setup window, and click **OK**.
10. Your report has now been converted and saved to the location you specified.