

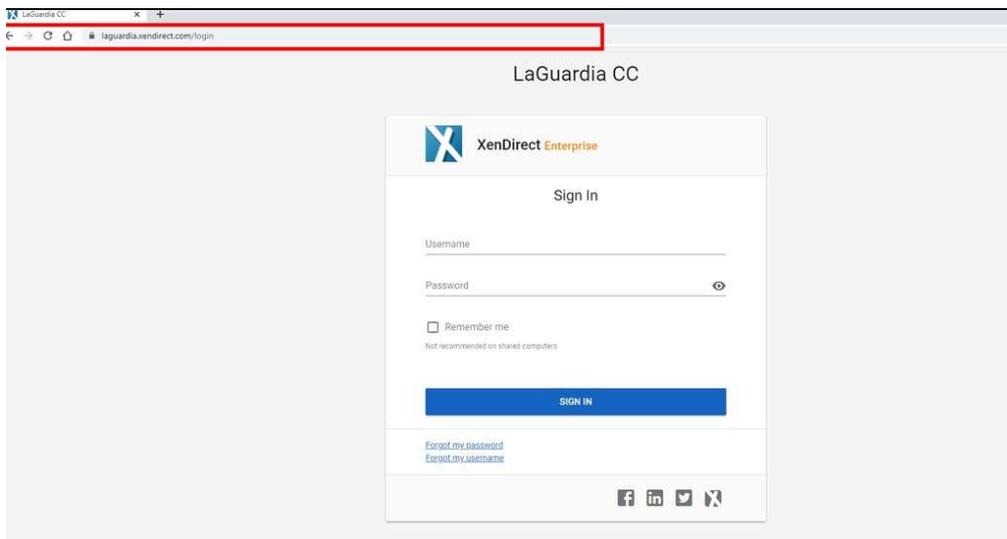


**DARE TO DO MORE**

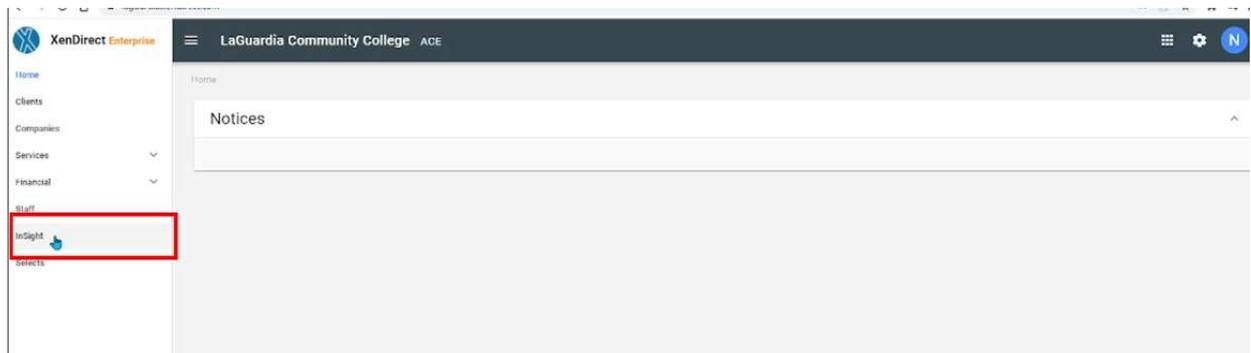
## How to Export a Report

1. Please open your preferred web browser and go to the following URL:

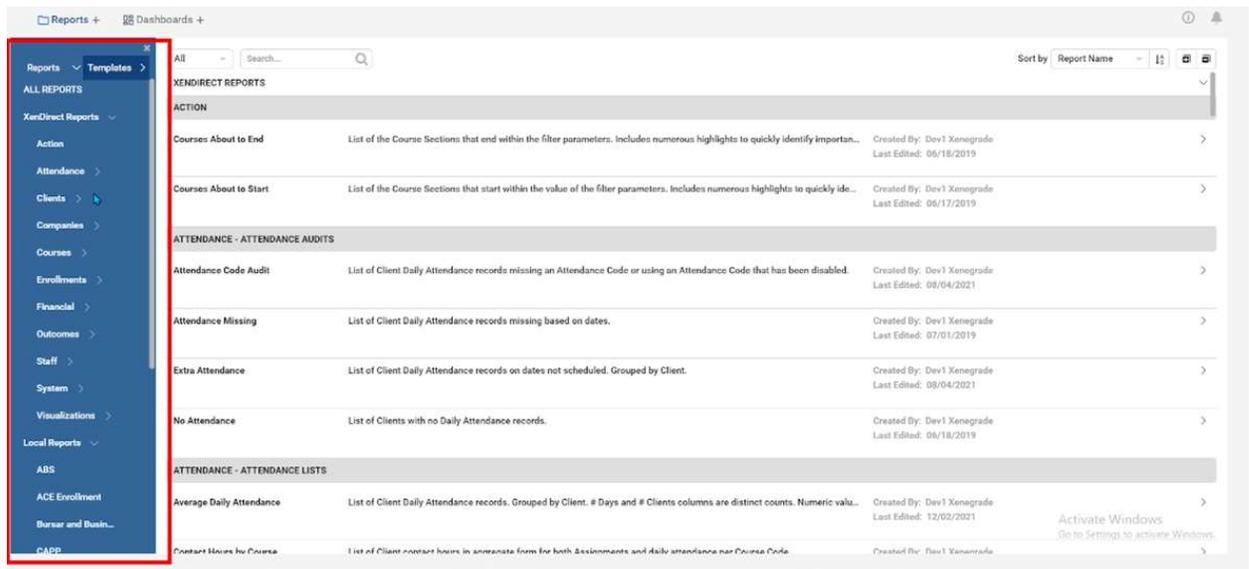
<https://laguardia.xendirect.com/login>



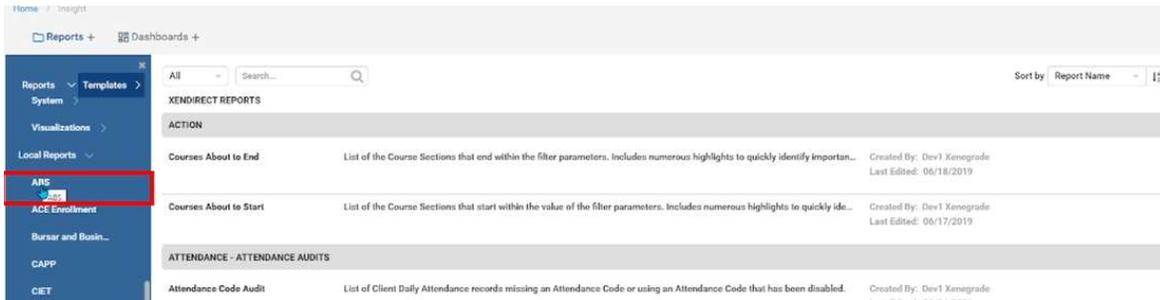
- a. If you do not have credentials please contact your program manager as they will provide credentials for you to login via e-mail.
2. Once logged select **Insight** on the left side menu



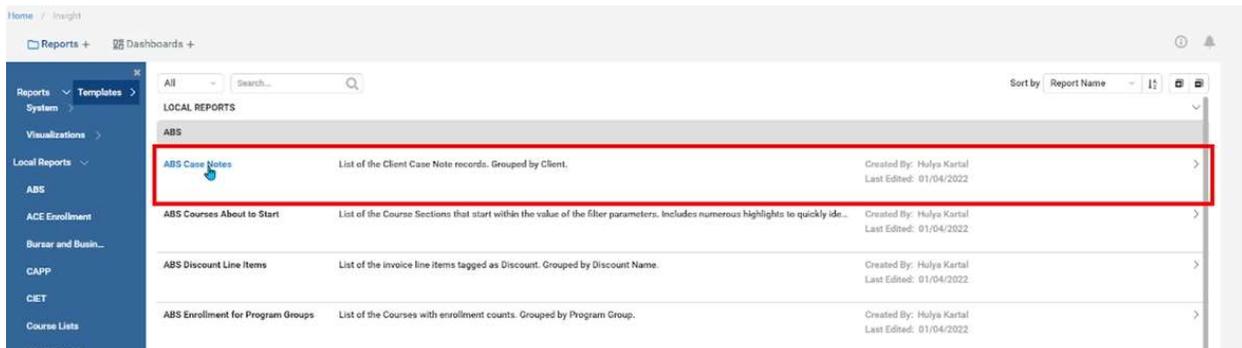
3. The left side will display a list of available reports according to your program.



a. If you do not have access to a report please contact your program manager or director for access.



4. Select the report.



5. Once the report is opens the top right side will display available features for the report.

Home / Insight

Reports + Dashboards +

Hide Header & Footer | Subscribe | Print | Email | **Export** | Edit | Save | Cancel | Close

Preview Records 100

Filters

Client Name (s-) | StaffName | Date | CourseCode

3 Date Between (Date)  
4 CourseCode =

Student Name

Student ID

Date	Type	Method	Course Code	Staff	Follow Up Date	Note Content
			HSEET00522.004.03.00			
			HSEET00522.004.05.00			
			HSEET00971.004.02.00			

6. From the options select **Export**.

Home / Insight

Reports + Dashboards +

Hide Header & Footer | Subscribe | Print | Email | **Export** | Edit | Save | Cancel | Close

Preview Records 100

Filters

Client Name (s-) | StaffName | Date | CourseCode

3 Date Between (Date)  
4 CourseCode =

Student Name

Student ID

Date	Type	Method	Course Code	Staff	Follow Up Date	Note Content
			HSEET00522.004.03.00			
			HSEET00522.004.05.00			
			HSEET00971.004.02.00			

7. Based on the options available you can select to export to Word, Excel, PDF or CSV.

Home / Insight

Reports + Dashboards +

Hide Header & Footer | Subscribe | Print | Email | **Export** | Edit | Save | Cancel | Close

Preview Records

Word  
Excel  
PDF  
CSV

Filters

Client Name (s-) | StaffName | Date | CourseCode

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Date	Type	Method	Course Code	Staff	Follow Up Date	Note Content
			HSEET00522.004.03.00			
			HSEET00522.004.05.00			
			HSEET00971.004.02.00			

8. The report will begin to be exported to the bottom right of the page.

The screenshot shows the 'ABS Case Notes' report interface. At the top right, there are buttons for 'Hide Header & Footer', 'Subscribe', 'Print', 'Email', 'Export', 'Edit', 'Save', 'Cancel', and 'Close'. Below these is a 'Preview Records' dropdown set to '100'. A filter bar contains 'Client Name (s-)', 'StaffName', 'Date', and 'CourseCode'. The report header includes 'Report Generated: 04/29/2022 01:33:58 PM', 'User: Nihal Kayharae', and 'Organization: LaGuardia CC'. Below the header, there is a navigation path: 'InSight Menu >> Clients >> Client Lists >> Case Notes' and a description: 'List of the Client Case Note records. Grouped by Client.' The 'Report Filter Info:' section lists: '1 Client Name (s-) Begins With', '2 StaffName =', '3 Date Between (Date)', and '4 CourseCode ='. A 'Student Name:' section is also present. A table with columns 'Date', 'Type', 'Method', 'Course Code', 'Staff', 'Follow Up Date', and 'Note Content' is shown. At the bottom right, a red box highlights a status bar that says 'Exporting: ABS Case Notes.pdf'.

a. When the download is completed you will see it listed at the bottom of the browser.

This screenshot shows the same 'ABS Case Notes' report interface as above, but with a red box at the bottom left highlighting the browser's download bar. The download bar shows a file named 'ABS Case Notes (1).pdf' with a download icon. The rest of the report interface is identical to the previous screenshot.

9. The report will be save on your Downloads folder.

For further info, please visit the Xendirect Knowledge Base page:

<https://xenegrade.kayako.com/article/494-what-is-insight>