How to create a CSV file (Spreadsheet)

At times the user may wish to modify the report (such as sorting into different orders) so it is advantageous to be able to produce the output in a format that is able to be manipulated.

This is done by using the CSV **(comma separated value)** function instead of the PDF function. The CSV will produce the output in a spreadsheet against which any spreadsheet function can then be applied (mathematical functions, sorting, business functions).

To create a CSV file:
- Access the required file option through the **Reports** menu
- Enter the required report criteria
- Select CSV for Report Layout
- Schedule the report
- Review the output from **My Reports** (and manipulate as required)

Go to **Reports** and enter required criteria

Click the **Schedule Report** button to run the report and access the completed report through **My Reports** option (unless sent to an email address).

Review the report (click download), then open the file.

When first opened the file, the fields may be truncated because of the spreadsheet format. It is a relatively simple task to expand the fields to display the full set of data.

Use Ctrl + A to select all the cells in the spreadsheet (and make them go blue), position the cursor between the A and B columns. The cursor will change shape. Then double click to expand ALL the fields.

When expanded the fields are fully readable. At this point the user can manipulate the data using normal spreadsheet techniques.