

Export Data Form Action



When the **Export Data** action is added to a standard form, it allows users to open a **Data Analytics Export** report directly from an object instead of an activity [view](#) or [action](#). These report types are specifically designed to export object data (properties, fields, workflow states, relationships, and references) into an Excel spreadsheet and therefore do not display object data through report elements.

Before this element can be added to a form, a **Data Analytics** report must be created for object type. See the [Create a Data Analytics Export Report](#) article for more information.

The image shows two screenshots side-by-side. The left screenshot is titled 'Location Review' and displays a form for 'Montreal' (L-1). It includes fields for 'Location Name' (Montreal), 'Incidents at this location' (with a list of incidents like 'HP/Accident 2016/9/21'), and 'Address' (123 Street Avenue, Montreal, QB. 1A1 A1A). A green button labeled 'EXPORT LOCATION DATA' is highlighted at the bottom. The right screenshot is titled 'Location Data Export' and shows an 'ANALYTICS EXPORT' tool. It includes a description, 'EXPORT DETAILS' (Report Name: Location Data Export, Report Focus: Location > Incident, Anchor Object: Montreal), and buttons for 'CANCEL' and 'EXPORT TO EXCEL'.

Clicking the button for the Export Data action on an object's form will display a data analytics report for that object.

To add the Export Data action to a standard form:

1. [Create](#) a data analytics report.
2. If the form is not already open, click the  icon in the top bar > **Configurable Forms** in the **Views** section, then select a form.
3. Click the  icon in the **Actions** section of the **Form Elements** palette to expand it.
4. Drag and drop the **Export Data** element to the canvas, which will automatically display the **Add Component** screen.



The **Export Data** form action should only be added to forms for existing objects. See [Form Actions Overview](#) page for more information.

5. Enter text to display on the button the user will click in the **Button Text** field.
6. Select a data analytics report from the **Export** dropdown menu. You can only select a report that's related to the current configurable form's object type.

Add Component ✕


Button Text

Export

SAVE **CANCEL**

The Add Components screen for the Export Data form action.

7. Click **Save** to return to the canvas.

8. To edit the action, hover your cursor over the element on the canvas, then click the  icon.