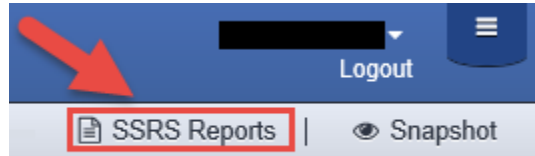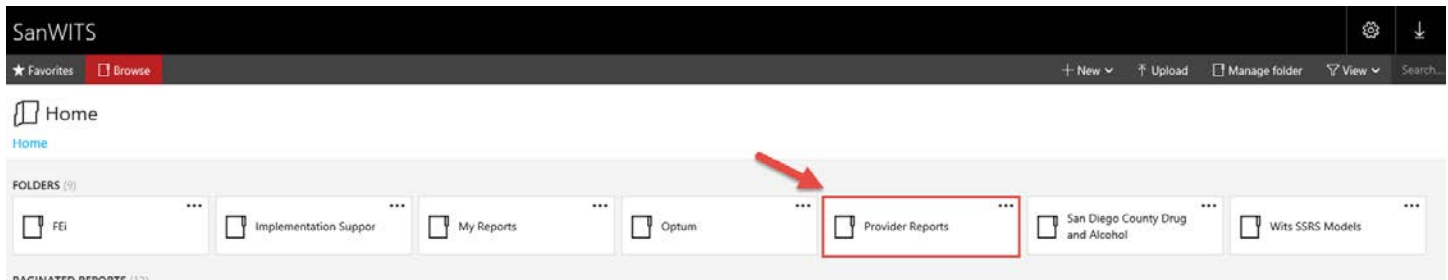# SanWITS SSRS Tip Sheet

"How to Run Reports from SSRS and Save as Excel File"

- **Note**: Proper menu access to SSRS is required to display this link. If this link is absent, please contact the SUD Support Desk for assistance.
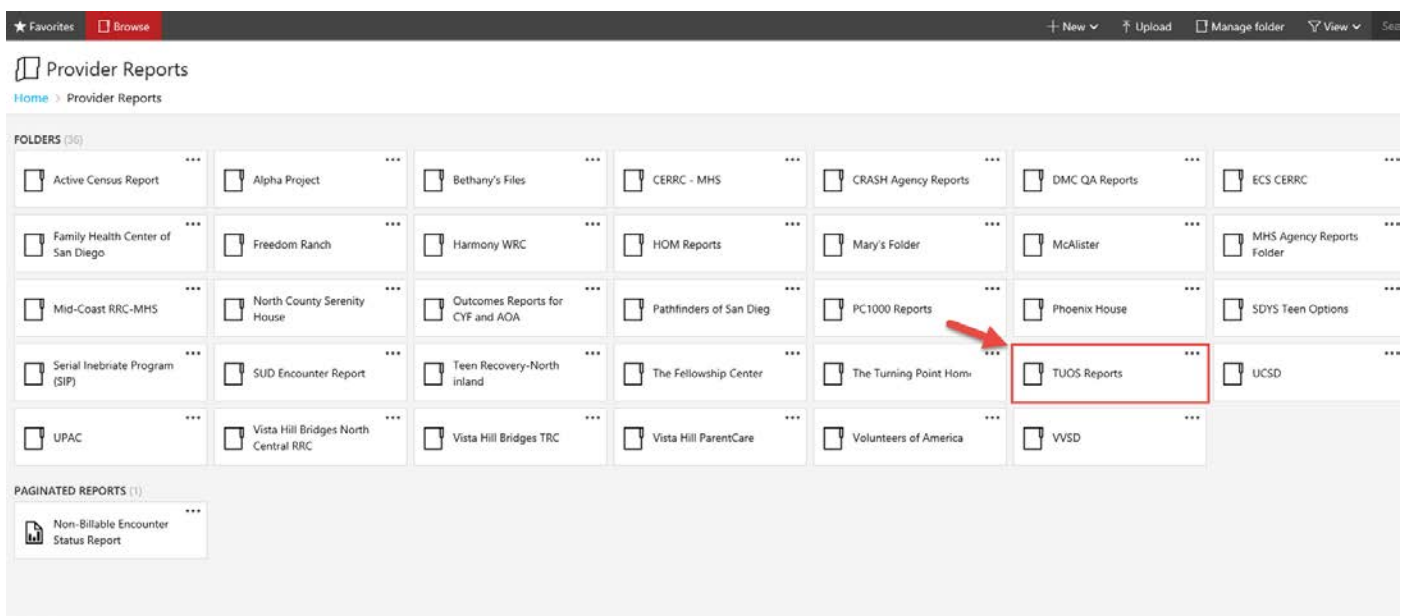
1- Click on the SSRS link in the upper right-hand corner of the SanWITS window.

2- On Home Screen > click on the "Provider Reports" Folder.

3- Click on any Folder you would like to go and select the report you want to run. For example, the TUOS Reports Folder.
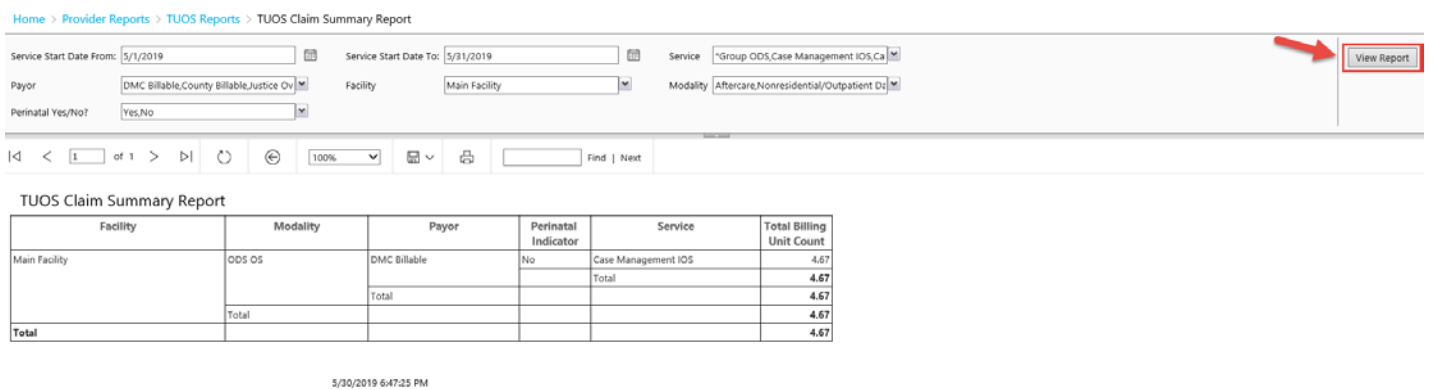
SanWITS SSRS Tip Sheet

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4- Once you click on the selected Folder, you'll see the available reports. For this example, we'll use the TUOS Claim Summary Report
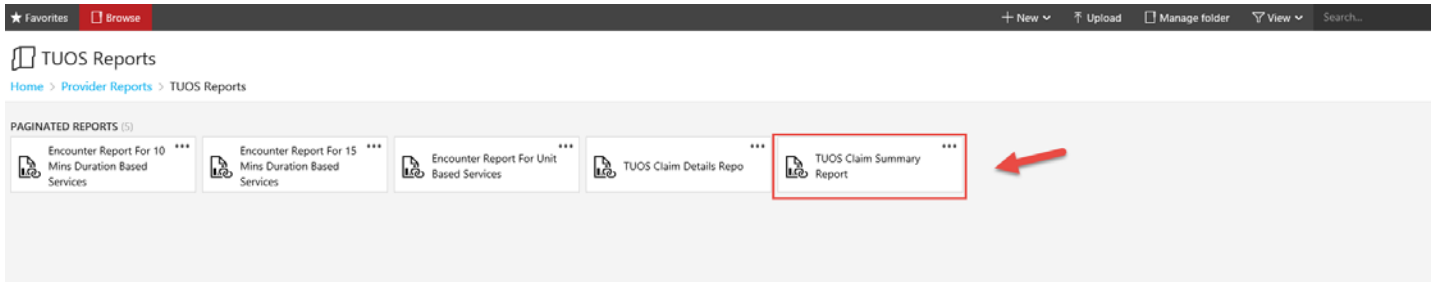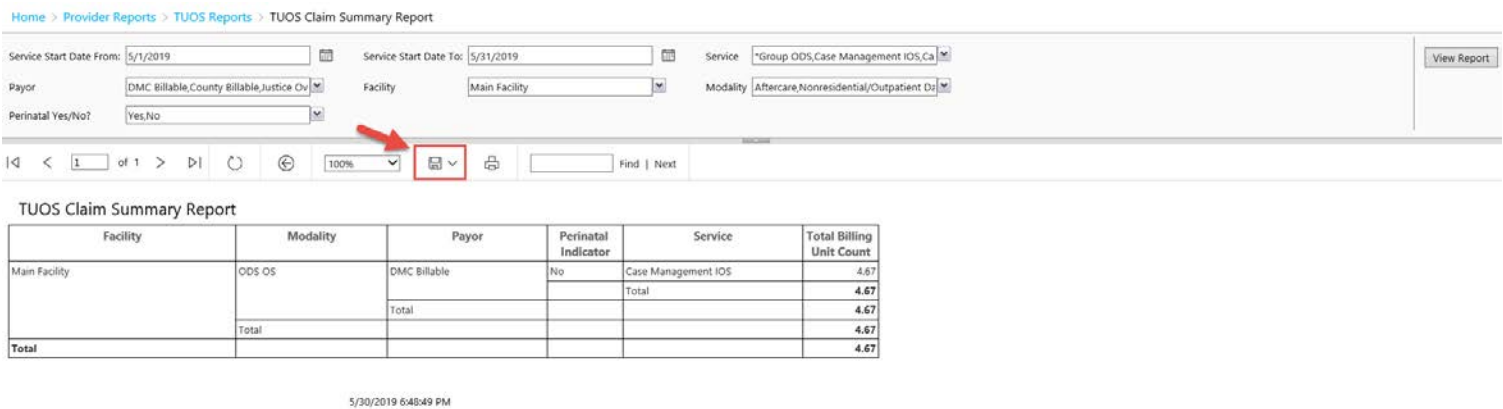

5- Wait for the screen to load and a prompt bar will display. Once you type in the parameters you need, click "View Report" and wait for report to load (may take a few minutes). In this TUOS Claims Report example, you will be able to select Claims Service Dates, Payor, Facility, Service, Perinatal and Modality for your parameters.

6- After Report fully loads, click on Save icon from the dropdown on the Menu bar.

"How to Run Reports from SSRS and Save as Excel File"

7- Select save file in Excel format.

8- You're going to receive a message window asking: "Do you want to open or save "Report" from reports.witsweb.org?" Click Open.
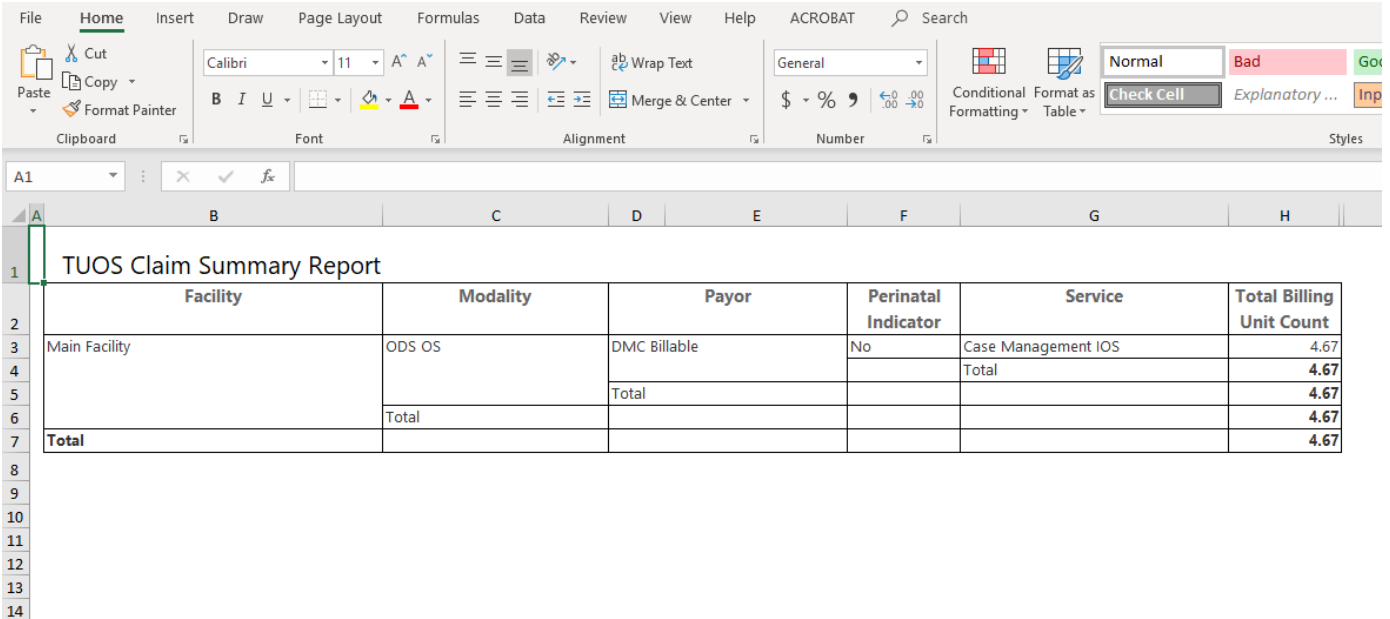

9- After clicking Open, you're going to receive a Warning message saying: "A website wants to open web content using this program on your computer." Click Allow.
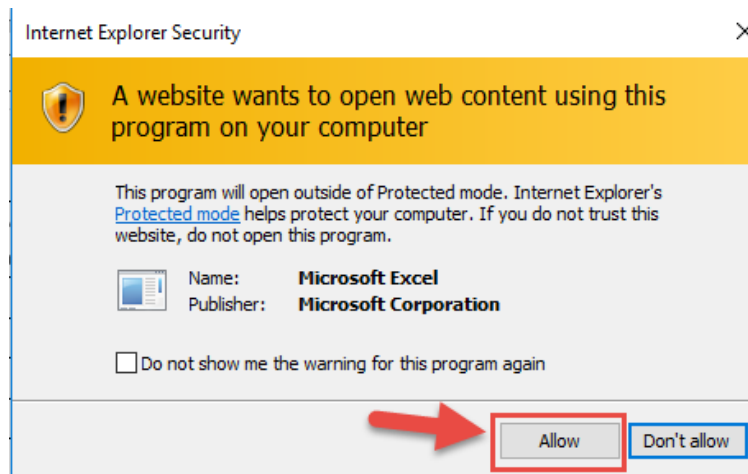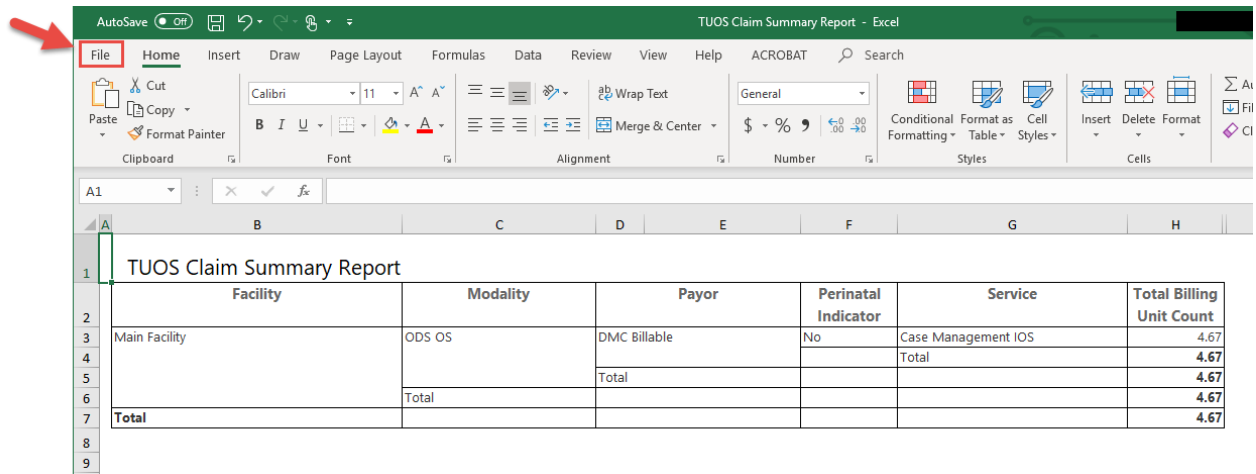
"How to Run Reports from SSRS and Save as Excel File"

10- Open downloaded report in Excel format.

11- Click on File in the Menu Bar.

"How to Run Reports from SSRS and Save as Excel File"

12- Choose "Save As."
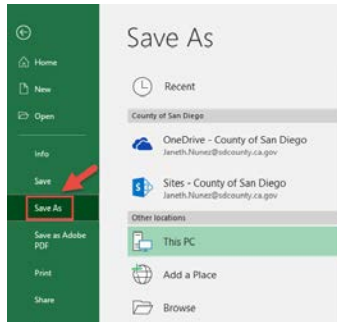
13- Browse and choose a location to save file.