


A Quick Reference Guide to Exporting Data to Excel

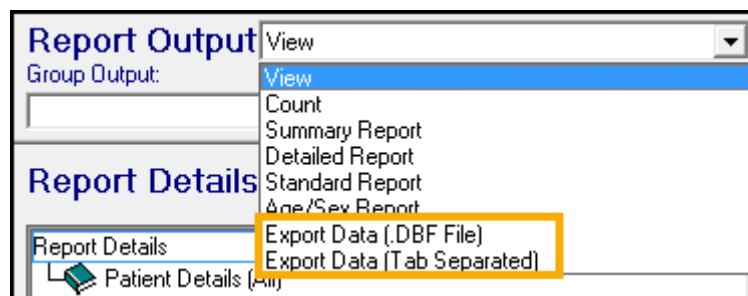
There are two options in **Report Output** for exporting data:

- **Export Data (DBF File)**
- **Export Data (Tab Separated)**

 **Note** - To see free text comments of any entry in **Vision 3** on an extracted file, you must select **Export Data (Tab Separated)**.

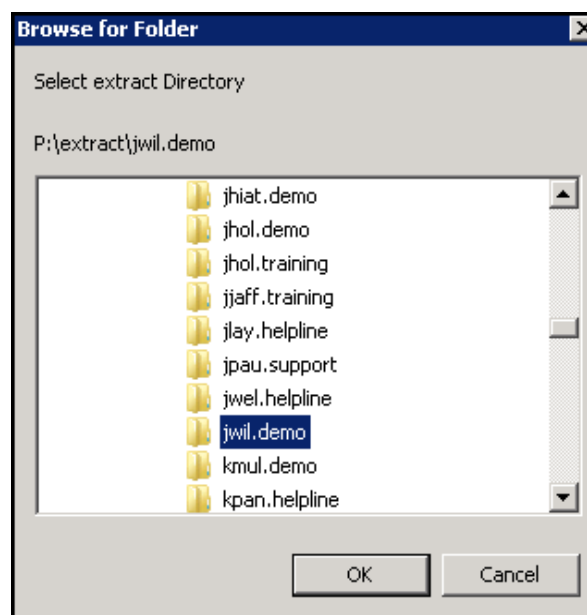
To export data to Excel:

1. From **Report Output**, select one of the **Export Data** options:



 See the [Search and Reports Help Centre](#) for details on how to run a report if required.

2. Select **Run** to generate the search and the **Browse for Folder** screen displays:



3. The **Save to** screen displays, select the directory to save the extract to. This defaults to either C:\extract (practice server) or P:\extract\YourName (hosted server).
4. Select **OK** to proceed.
5. If you have previously exported a search, a warning displays 'XXXXXXX database exists, it will be overwritten, continue', select **Yes** to proceed. Each export creates a patient file:
 - **Tab Separated** - patient.txt
 - **DBF** - patient.dbf, patient.cdx and patient.fpt.

Additional files are created for each entity, for example, a medication search generates file(s) with the name *therapy.XXX*.

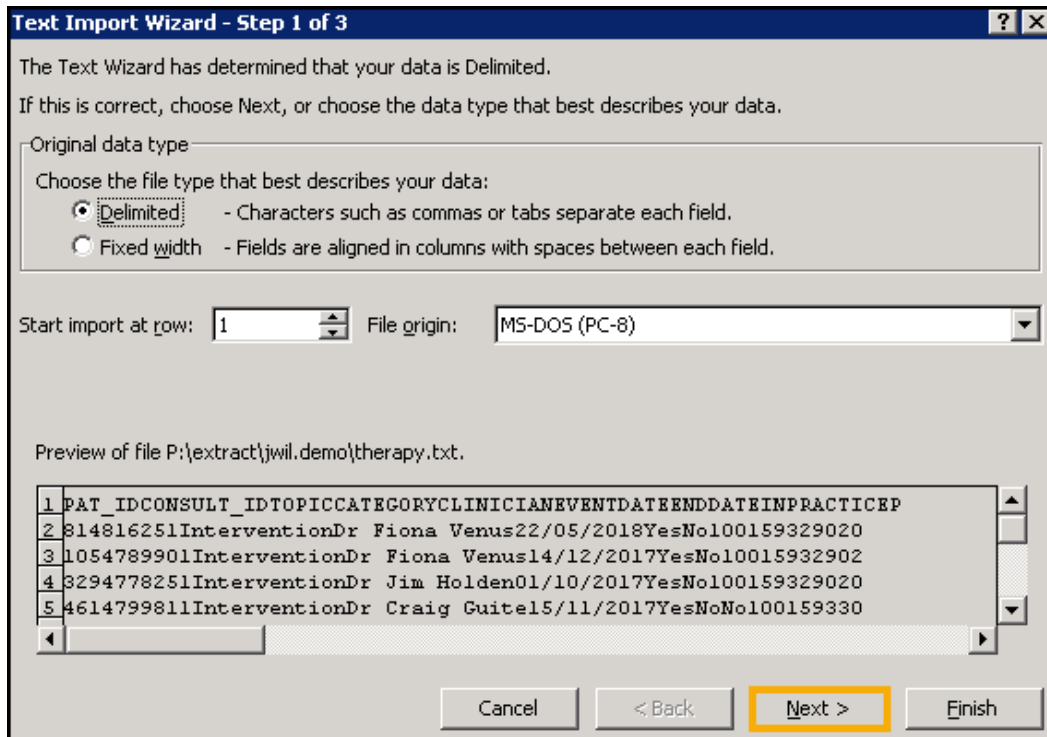
Importing a TXT File into Excel

The following is an example of how to import a THERAPY.TXT into Excel following the export of a Medication search as an **Export Data (Tab Separated)** file:

1. Open **Microsoft Excel**, and select **File - Open**.
2. Browse to the location the files are extracted too, for example, C:\extract (practices with their own server) or P:\extract\YourName (hosted practices).
3. Change the file type on the bottom right, to **All Files** and the list refreshes and now displays .TXT and .DBF files:



- Select the file, in this example, THERAPY.TXT, select **Open** and the **Text Import Wizard** displays:



The Text Wizard has determined that your data is Delimited.

If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

Delimited - Characters such as commas or tabs separate each field.

Fixed width - Fields are aligned in columns with spaces between each field.

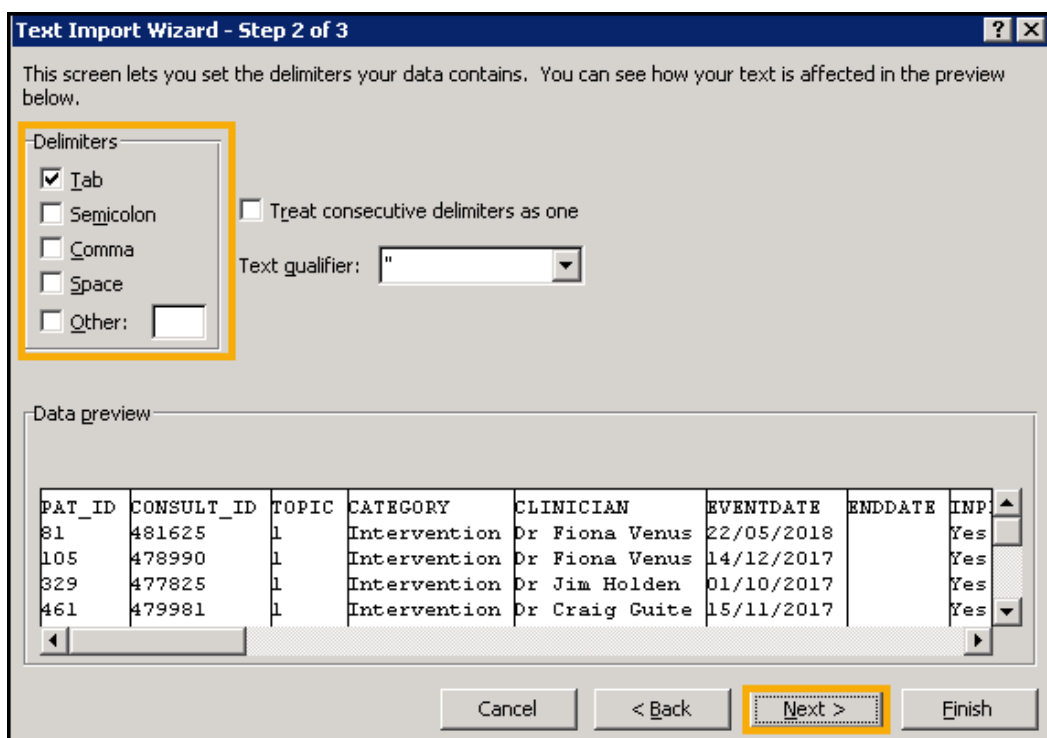
Start import at row: 1 File origin: MS-DOS (PC-8)

Preview of file P:\extract\jwil.demo\therapy.txt.

	PAT_ID	CONSULT_ID	TOPIC	CATEGORY	CLINICIAN	EVENTDATE	ENDDATE	INP
1	814816251	Intervention	Dr Fiona Venus	22/05/2018	Yes	No	100159329020	
2	1054789901	Intervention	Dr Fiona Venus	14/12/2017	Yes	No	100159329020	
3	3294778251	Intervention	Dr Jim Holden	01/10/2017	Yes	No	100159329020	
4	4614799811	Intervention	Dr Craig Guite	15/11/2017	Yes	No	No	100159330

Buttons: Cancel, < Back, Next >, Finish

- Check that **Original data type** is set to **Delimited** and then select **Next** to proceed.
- The **Step 2** screen displays, accept the default values and select **Next**:



This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

Tab

Semicolon

Comma

Space

Other:

Treat consecutive delimiters as one

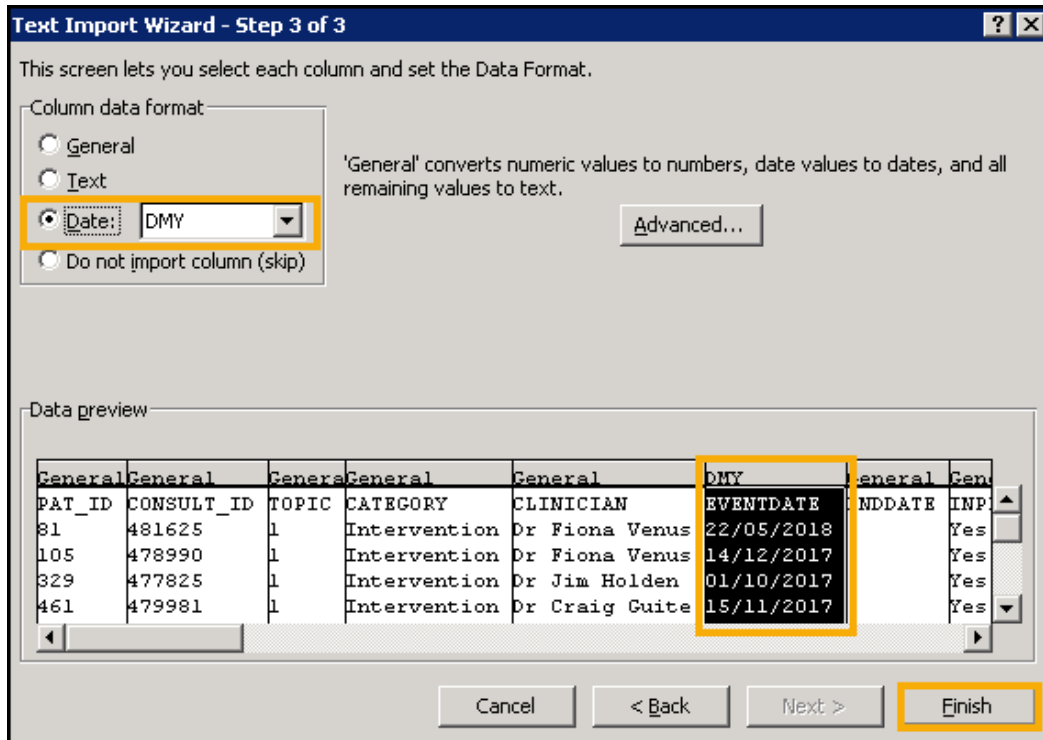
Text qualifier: "

Data preview

PAT_ID	CONSULT_ID	TOPIC	CATEGORY	CLINICIAN	EVENTDATE	ENDDATE	INP
81	481625	1	Intervention	Dr Fiona Venus	22/05/2018		Yes
105	478990	1	Intervention	Dr Fiona Venus	14/12/2017		Yes
329	477825	1	Intervention	Dr Jim Holden	01/10/2017		Yes
461	479981	1	Intervention	Dr Craig Guite	15/11/2017		Yes

Buttons: Cancel, < Back, Next >, Finish

- The **Step 3** screen displays, this allows you to select any columns containing a date and set the data format to **Date**. To do this, find and highlight the **Event Date** column and then set the **Column data format** to **Date**:



Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format:

- General
- Text
- Date: **DMY**
- Do not import column (skip)

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

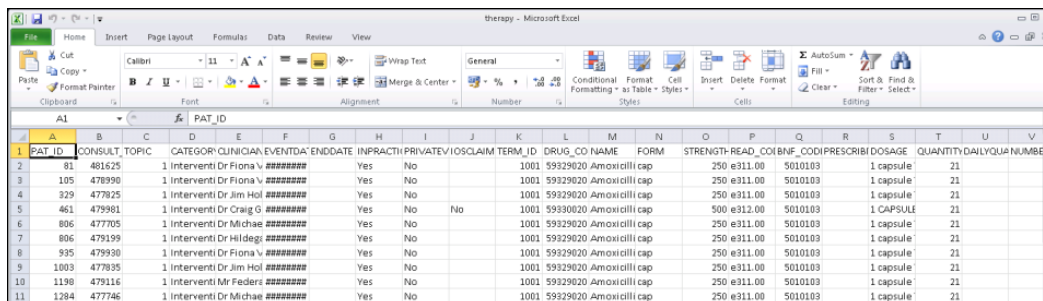
Advanced...

Data preview

PAT_ID	CONSULT_ID	TOPIC	CATEGORY	CLINICIAN	EVENTDATE	ENDDATE	INP
81	481625	1	Intervention	Dr Fiona Venus	22/05/2018		Yes
105	478990	1	Intervention	Dr Fiona Venus	14/12/2017		Yes
329	477825	1	Intervention	Dr Jim Holden	01/10/2017		Yes
461	479981	1	Intervention	Dr Craig Guite	15/11/2017		Yes

Cancel < Back Next > Finish


- Select **Finish** to proceed and the spreadsheet displays:



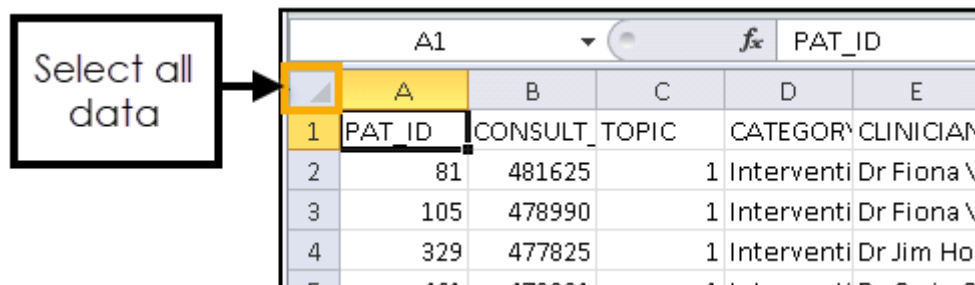
PAT_ID	CONSULT_ID	TOPIC	CATEGORY	CLINICIAN	EVENTDATE	ENDDATE	INPRACTICE	PRIVATE	I/O	CLAIM	TERM_ID	DRUG_CODE	NAME	FORM	STRENGTH	READ_CODE	BNF_CODE	PRESCRIBED	DOSAGE	QUANTITY	DAILY	QUANTITY
81	481625	1	Intervention	Dr Fiona V	22/05/2018		Yes	No			1001	59329020	Amoxicilli cap	250	e311.00	5010103		1 capsule	21			
105	478990	1	Intervention	Dr Fiona V	14/12/2017		Yes	No			1001	59329020	Amoxicilli cap	250	e311.00	5010103		1 capsule	21			
329	477825	1	Intervention	Dr Jim Hol	01/10/2017		Yes	No		No	1001	59330020	Amoxicilli cap	500	e311.00	5010103		1 CAPSUL	21			
461	479981	1	Intervention	Dr Craig G	15/11/2017		Yes	No			1001	59329020	Amoxicilli cap	250	e311.00	5010103		1 capsule	21			
806	477705	1	Intervention	Dr Michae			Yes	No			1001	59329020	Amoxicilli cap	250	e311.00	5010103		1 capsule	21			
806	479199	1	Intervention	Dr Hildeg			Yes	No			1001	59329020	Amoxicilli cap	250	e311.00	5010103		1 capsule	21			
935	479930	1	Intervention	Dr Fiona V			Yes	No			1001	59329020	Amoxicilli cap	250	e311.00	5010103		1 capsule	21			
1003	477835	1	Intervention	Dr Jim Hol			Yes	No			1001	59329020	Amoxicilli cap	250	e311.00	5010103		1 capsule	21			
1198	479116	1	Intervention	Mr Feders			Yes	No			1001	59329020	Amoxicilli cap	250	e311.00	5010103		1 capsule	21			
1284	477746	1	Intervention	Dr Michae			Yes	No			1001	59329020	Amoxicilli cap	250	e311.00	5010103		1 capsule	21			

Creating a Pivot Table in Excel

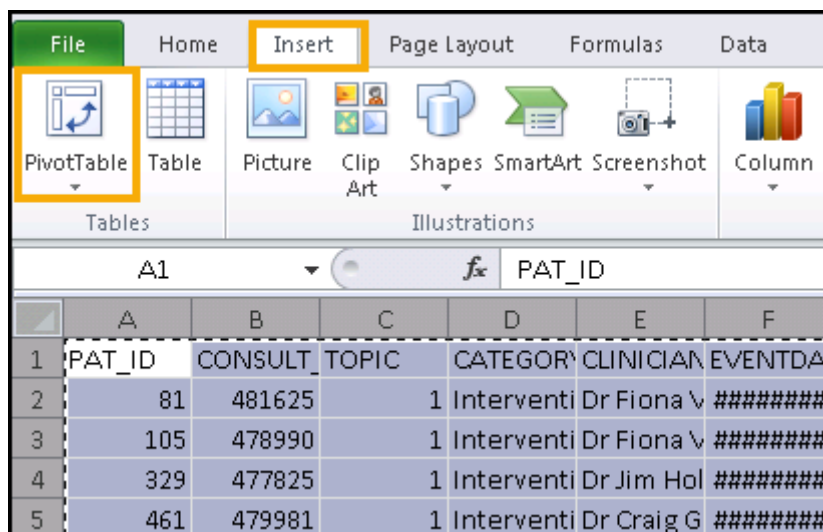
A powerful feature of Excel is pivot tables, these allow you to quickly look at a summary of data, the example below looks at Antibiotic prescribing by GP, and is based on a search by drug class, for example, Penicillin prescribed in the last month.

 **Note** – Ensure the report is already generated, and the THERAPY.TXT file is imported into Excel.

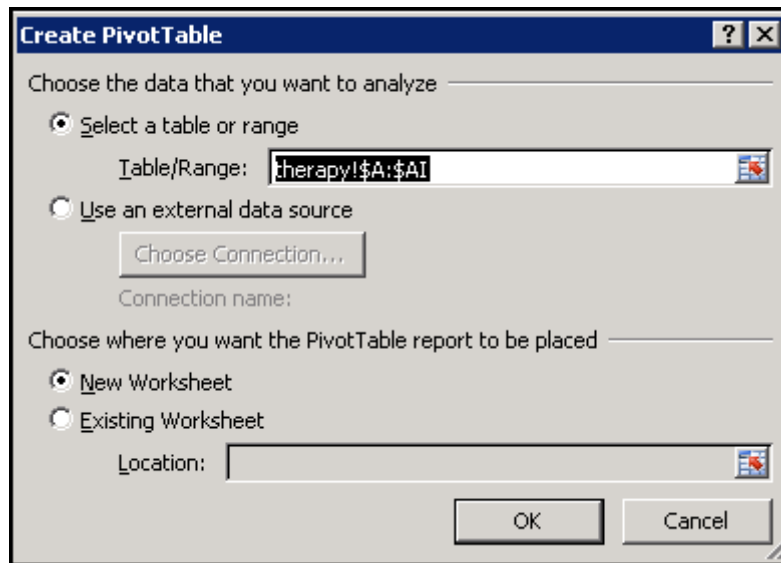
1. Open the THERAPY.TXT file, see [Excel - Import TXT File](#) on page 2 if required.
2. Select the top left corner of the spreadsheet to highlight all the data:



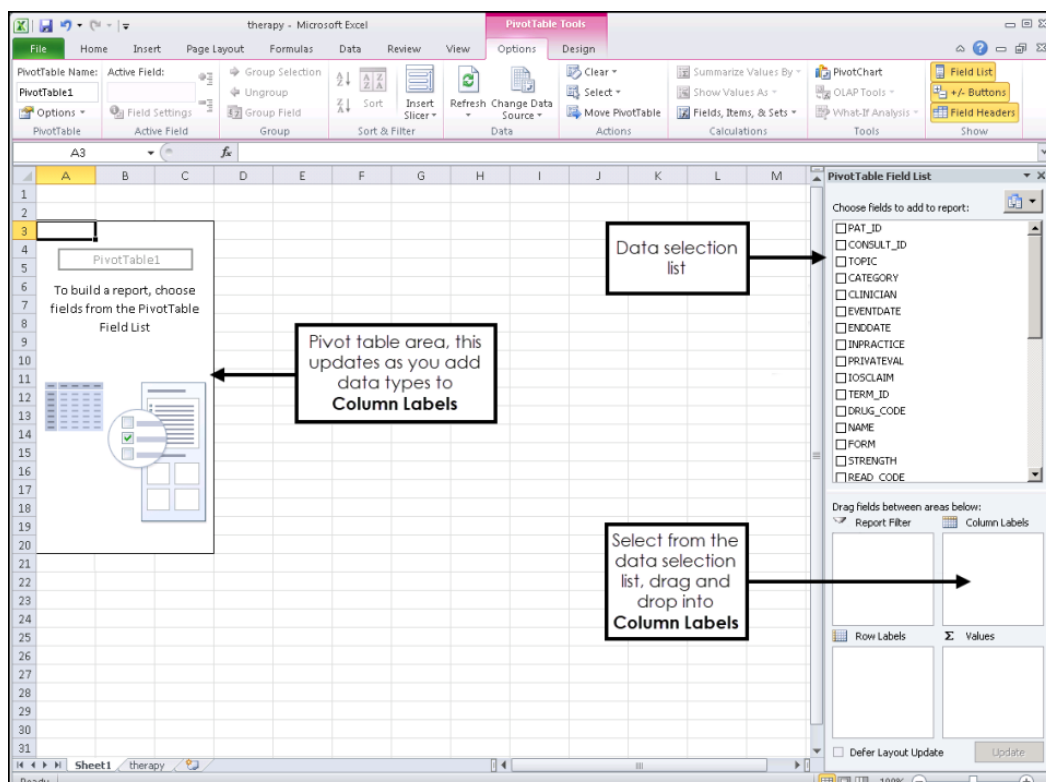
3. From the **Toolbar**, select **Insert** and then **Pivot Table**:



- The **Create Pivot Table** screen displays. The input range populates automatically, and you can choose to place the pivot table into a new worksheet (default) or the existing one:

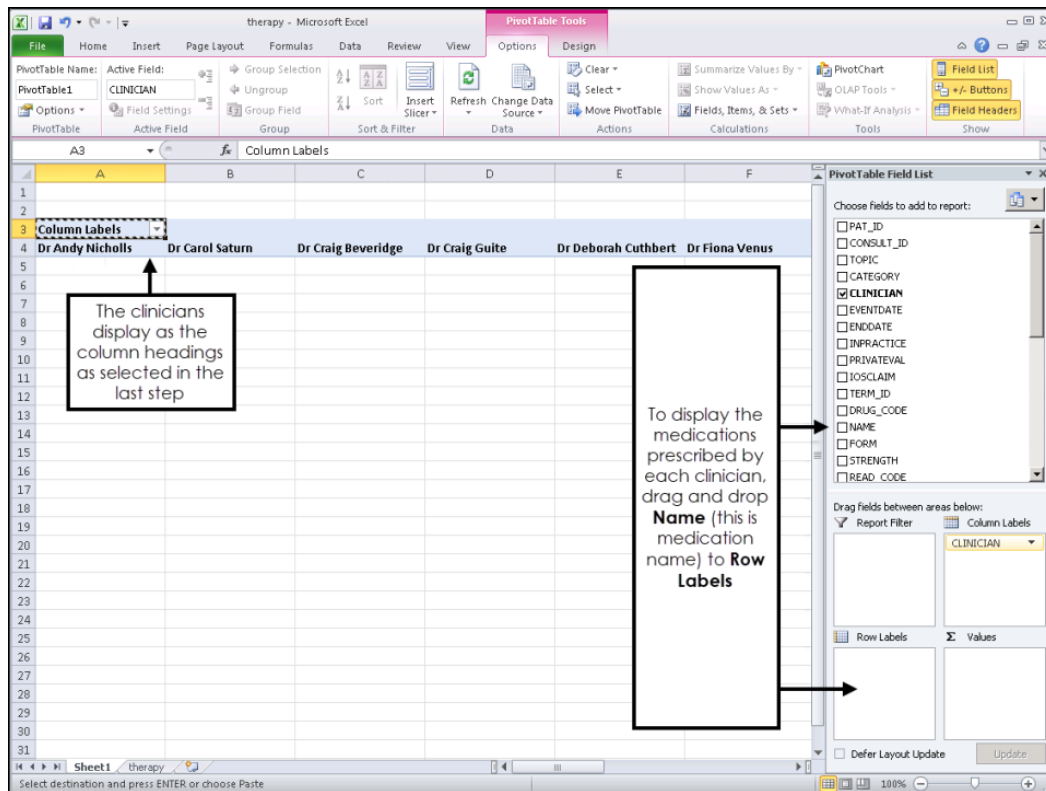


- Select **OK** to proceed
- The **Pivot Table** options displays. On the right the **Pivot Table Field List** includes all the column headings from your spreadsheet. The **Pivot Table** area on the left updates, as you add and remove data types. In this example, we want to look at prescribing by clinicians, drag **Clinician** into the **Column Labels** box:



The **Clinicians** now display along the top of the page as **Column Headings**.

- Next, in this example, we want to display the drugs prescribed by each clinician. Select **Name** from the **Pivot Table Field List**, this is the Drug Name, and drag it into the **Row Labels**:



The screenshot shows the Microsoft Excel interface with a PivotTable. The PivotTable is titled 'Column Labels' and has the following data:

Column Labels	Dr Carol Saturn	Dr Craig Beveridge	Dr Craig Guite	Dr Deborah Cuthbert	Dr Fiona Venus
Dr Andy Nicholls					

The PivotTable Field List on the right shows the following fields:

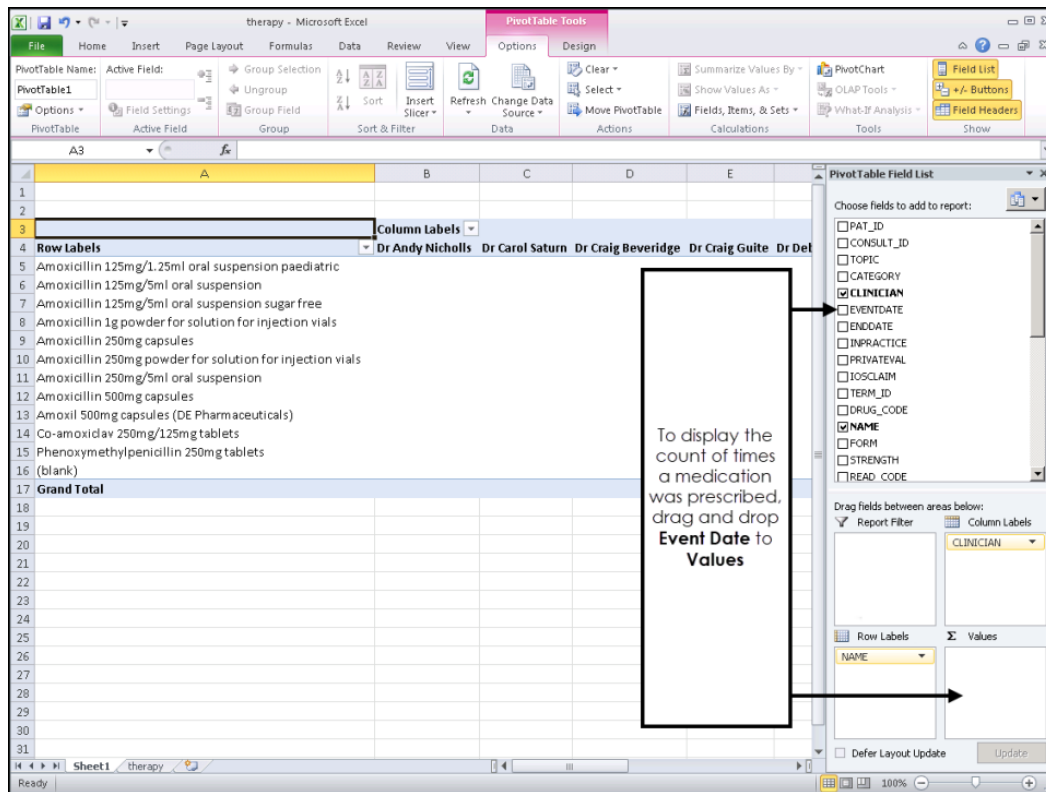
- Choose fields to add to report:
 - PAT_ID
 - CONSULT_ID
 - TOPIC
 - CATEGORY
 - CLINICIAN
 - EVENTDATE
 - ENDDATE
 - INPRACTICE
 - PRIVATEVAL
 - IOSCLAIM
 - TERM_ID
 - DRUG_CODE
 - NAME
 - FORM
 - STRENGTH
 - READ_CODE
- Drag fields between areas below:
 - Report Filter: CLINICIAN
 - Column Labels: CLINICIAN
 - Row Labels: NAME
 - Values: (empty)

Annotations in the image include:

- A box pointing to the 'Column Labels' header with the text: "The clinicians display as the column headings as selected in the last step".
- A box pointing to the 'Name' field in the PivotTable Field List with the text: "To display the medications prescribed by each clinician, drag and drop Name (this is medication name) to Row Labels".

The view automatically refreshes and the medication names display as rows.

- Next, to display a count of each time the clinician prescribed the drug, select **Event Date** from the **Pivot Table Field List**, this counts the number of dates that each clinician prescribed each medication, and drag it into **Values**:



The view automatically refreshes and the count displays.

9. Optionally you can:

- **Apply a Filter to the Clinicians** - Select **Column Labels** drop down and remove the tick from, for example, **Federated Locum** and **Blank**.
- **Insert a Graph** - From the Toolbar, select **Insert** and then the chart type required, for example, **Column** and then choose the type, for example, **2-D Column**:

