A Quick Reference Guide to Exporting Data to Excel

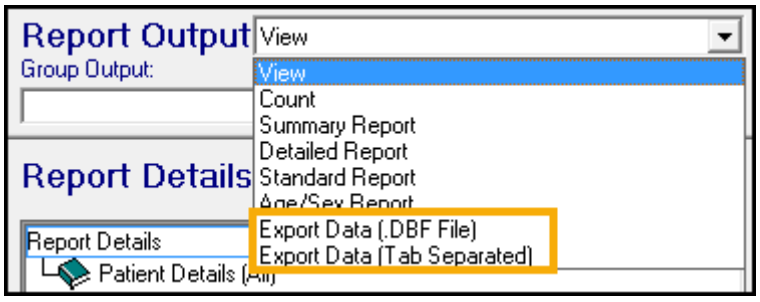
There are two options in **Report Output** for exporting data:

- **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)**.

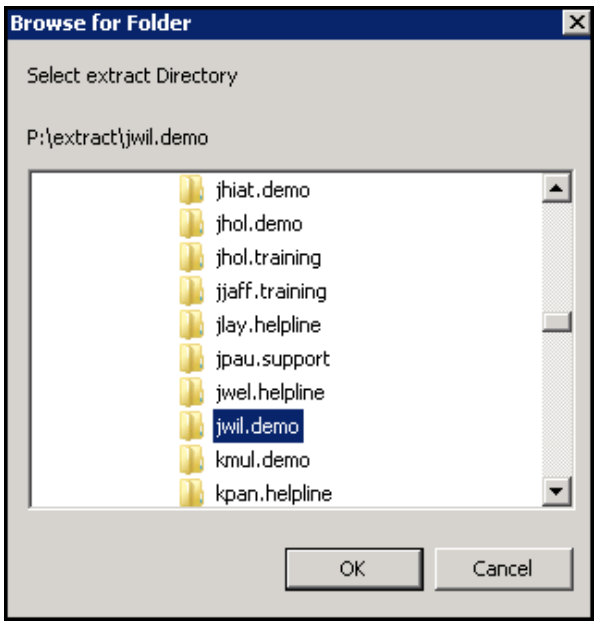
To export data to Excel:

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:



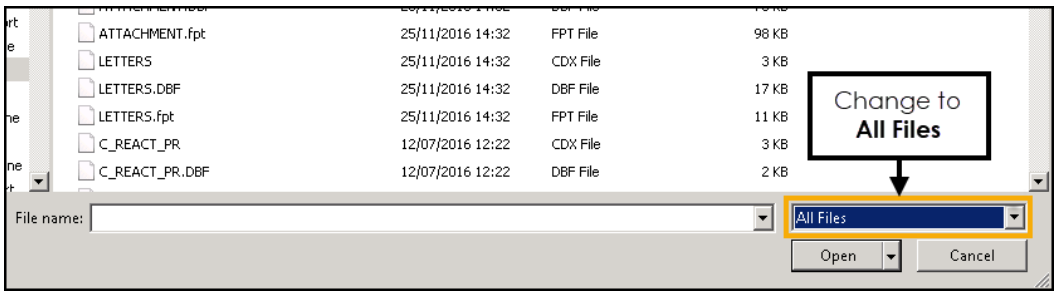
3. The **Save to** screen displays, select the directory to save the extract to. This defaults to either C:\extract (practice server) or P:\extract\YourName (hosted server).
4. Select **OK** to proceed.
5. If you have previously exported a search, a warning displays '*XXXXXXX database exists, it will 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*.

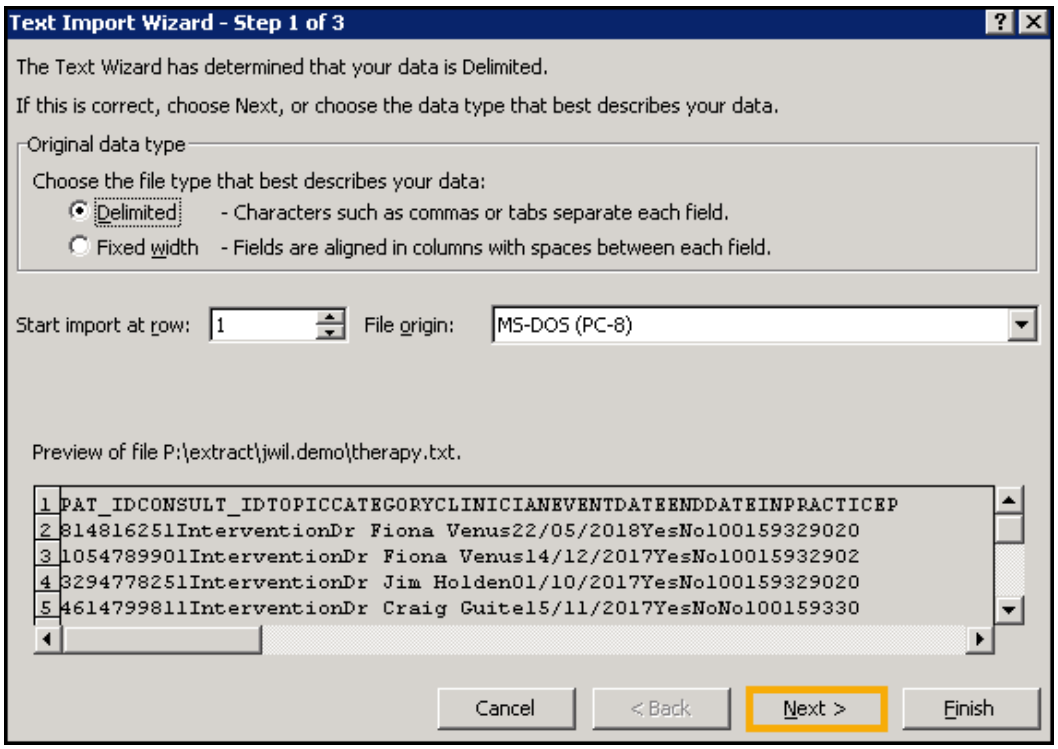
Importing a TXT File into Excel

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:

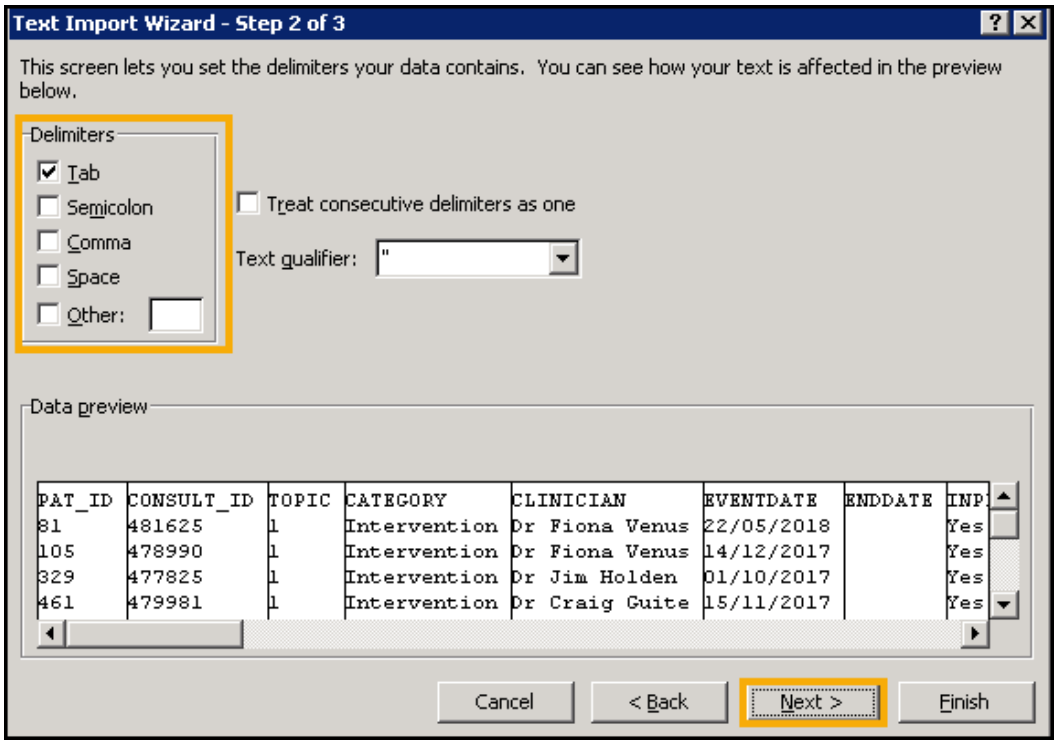
1. Open **Microsoft Excel**, and select **File - Open**.
2. Browse to the location the files are extracted too, for example, C:\extract (practices with their own server) or P:\extract\YourName (hosted practices).
3. Change the file type on the bottom right, to **All Files** and the list refreshes and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



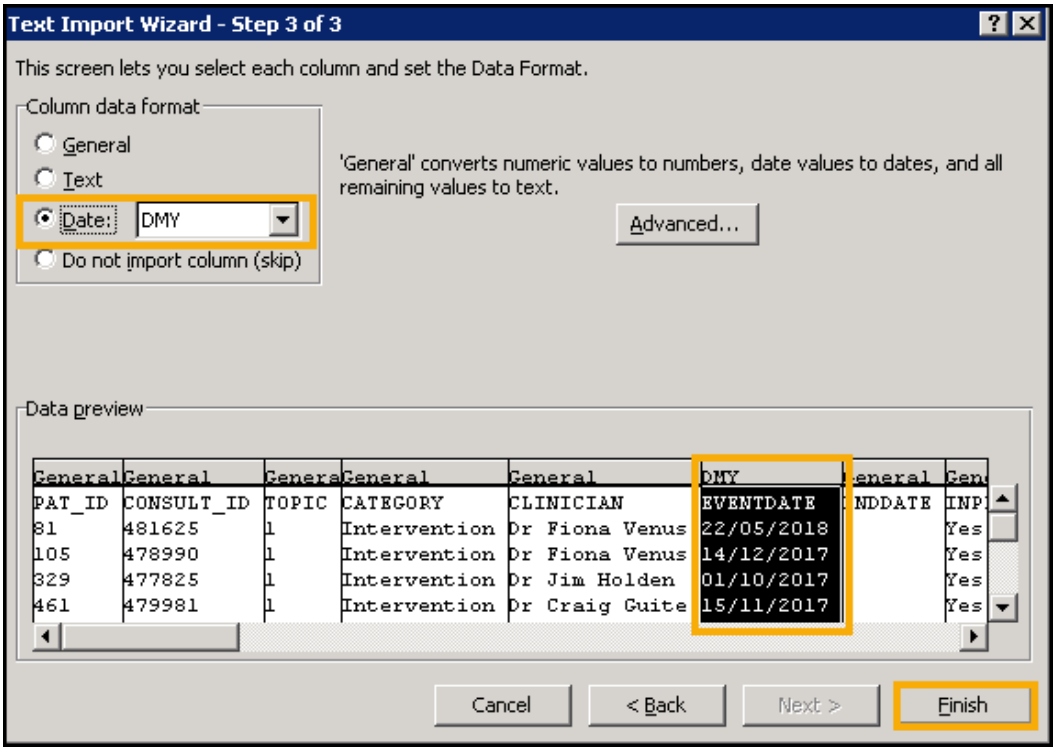
4. Select the file, in this example, THERAPY.TXT, select **Open** and the **Text Import Wizard** displays:



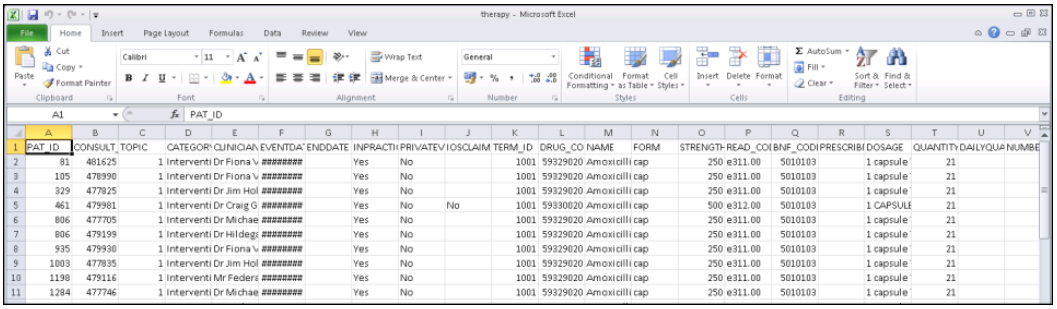
5. Check that **Original data type** is set to **Delimited** and then select **Next** to proceed.
6. The **Step 2** screen displays, accept the default values and select **Next**:



7. 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**:



8. Select **Finish** to proceed and the spreadsheet displays:

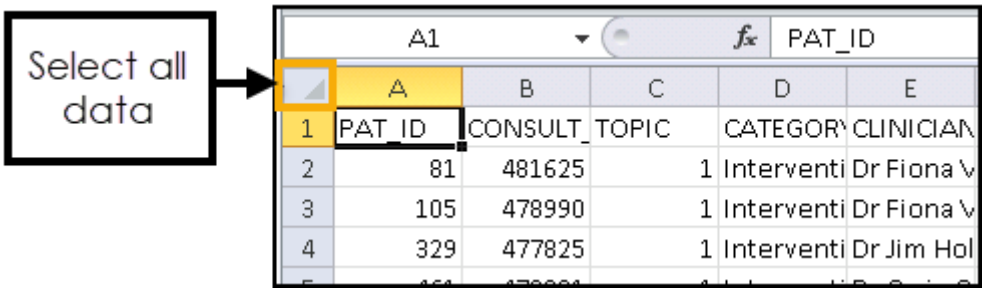


Creating a Pivot Table in Excel

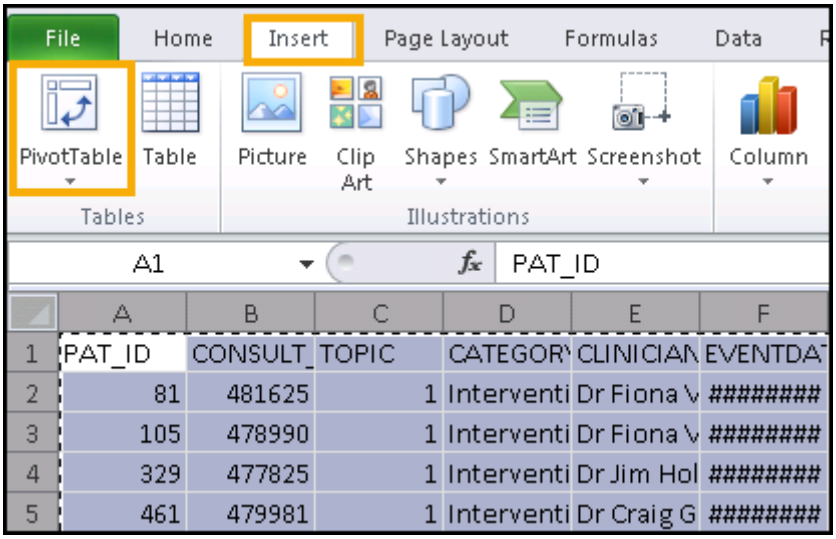
A powerful feature of Excel is pivot tables, these allow you to quickly look at a summary of data, the example below looks at Antibiotic prescribing by GP, and is based on a search by drug class, for example, Penicillin prescribed in the last month.

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

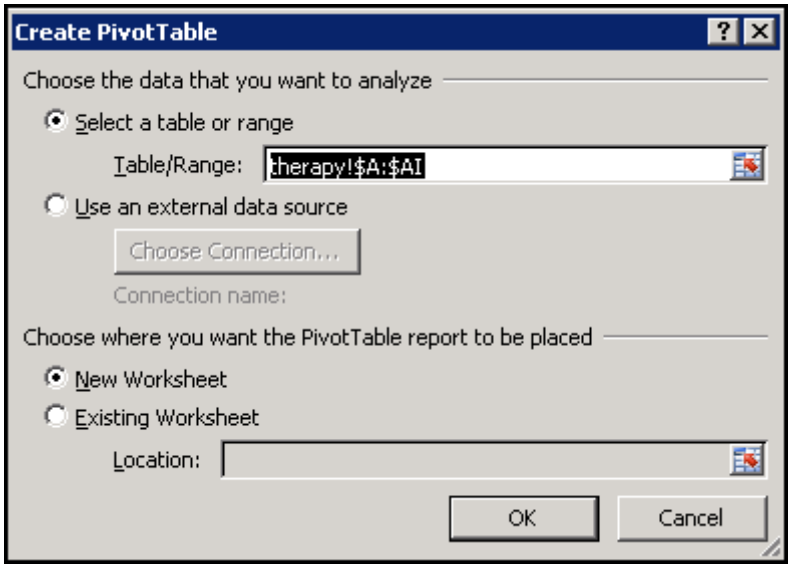
1. Open the THERAPY.TXT file, see **Excel - Import TXT File** on page **2** if required.
2. Select the top left corner of the spreadsheet to highlight all the data:



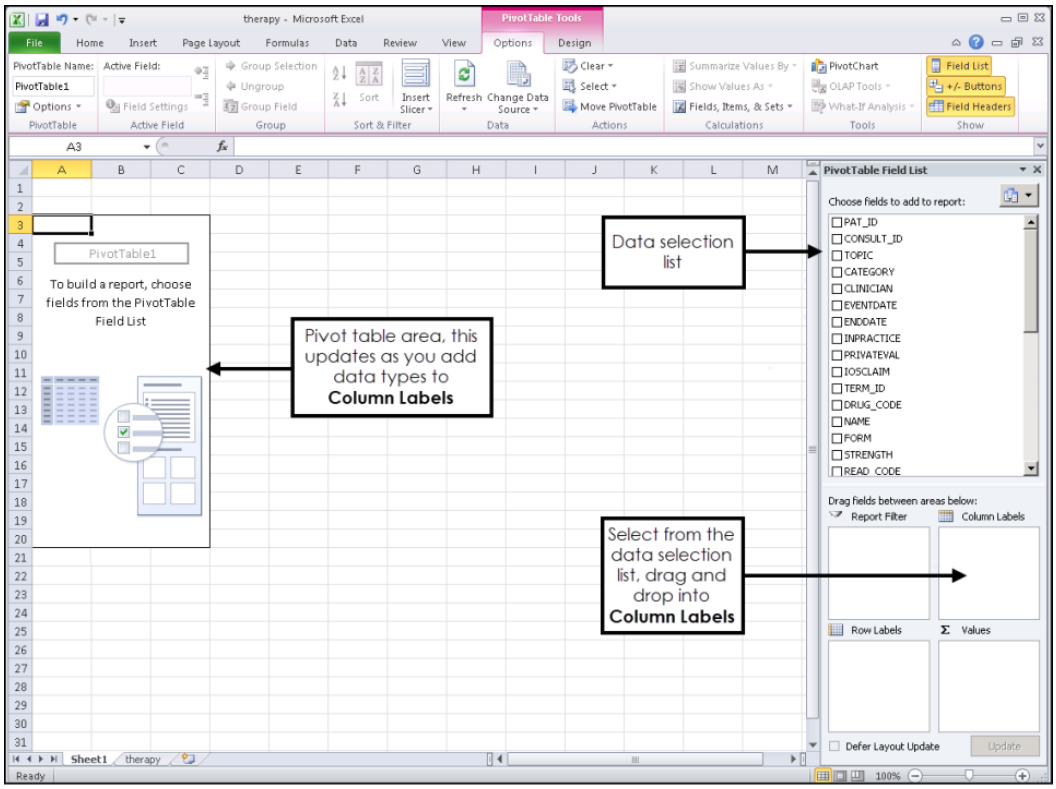
3. From the **Toolbar**, select **Insert** and then **Pivot Table**:



4. 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:

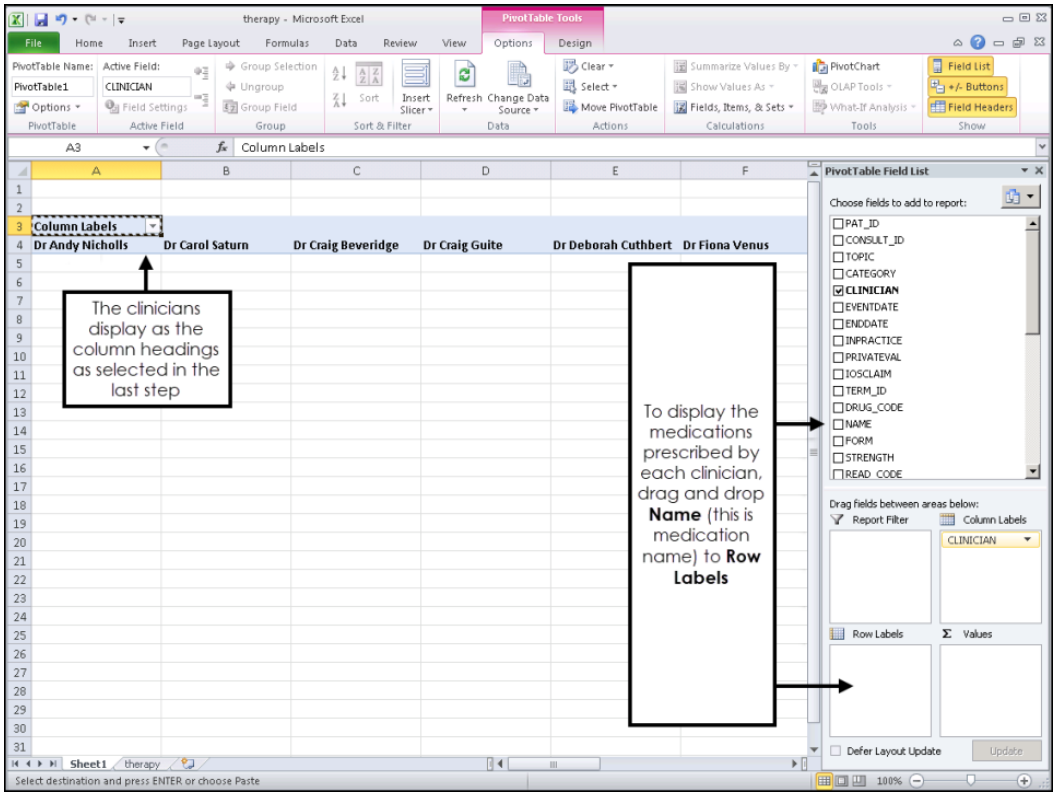


5. Select **OK** to proceed
6. The **Pivot Table** options displays. On the right the **Pivot Table Field List** includes all the column headings from your spreadsheet. The **Pivot Table** area on the left updates, as you add and remove data types. In this example, we want to look at prescribing by clinicians,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



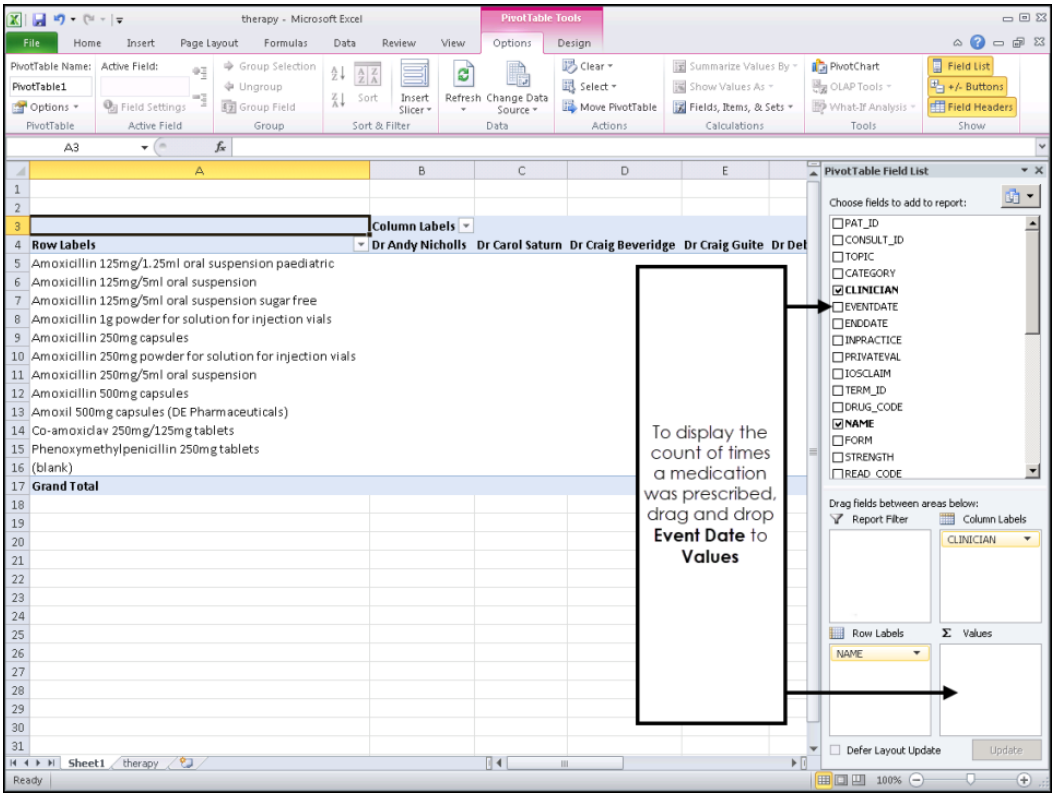
The **Clinicians** now display along the top of the page as **Column Headings**.

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

8. 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:**