

# Exporting from Primary Sense WALKTHROUGH

# Exporting data from reports to allow greater functionality

*If you would like to filter on several different options, exporting your data allows for extended functionality. There is also the ability to export to a .csv file for those who have a different spreadsheet program.* 

\*\* For the purposes of this guide, the instructions outline the steps for exporting to Excel however similar filtering options will be available in your chosen spreadsheet programs.

### **Instructions with Screenshots**

#### Exporting to Excel

When in a Primary Sense report, each table has the buttons 'Export to Excel/ Export to CSV' at the top. Click the 'Export to Excel' button

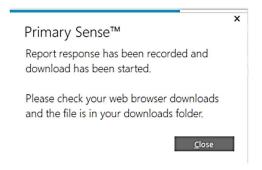
Information about this table

Show		Export To Excel Export To CSV		
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patients per page				
Remove	ACG Score	🔶 Patient Name 🌲	Patient Phone	Last
Remove	5	Anderson, C	0401 234 567	2022-07-24
Remove	3	Lee, E	0401 234 567	2021-10-01
Remove	3	Thompson, S	0401 234 567	2021-10-01

When you click Export to Excel, the option box below will appear. The "intention" marked will be recorded against the individual patient list report onto the "Summary Report of Practice Improvements". Once chosen, click 'Send Response'.

Care Report to help	intention as this can be you keep track of your ( nt <sup>O</sup> I am showing someone <sup>O</sup>	
Your feedback		
Send Response	Cancel	

You will then receive the message below.



## \*\* Please check your Downloads folder for the exported Excel file and double-click to open it

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#### Once Excel file is opened, click on 'Enable Editing'' at the top.

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2	ACG Score	Patient Name	Patient Phone	Last Visit	Existing Appt	GP Name	Age				
3	5	Anderson, C	0401 234 567	2022-07-24	Nil	Dr L Brown	51				
4	3	Lee, E	0401 234 567	2021-10-01	Nil	Dr L Brown	52				
5	3	Walker, T	0401 234 567	2021-10-01	Nil	Dr I Campbell	40				
6	3	Thompson, S	0401 234 567	2021-10-01	Nil	Dr L Brown	58				
7	3	Jones, U	0401 234 567	2019-07-06	Nil	Dr L Brown	58				
8	3	Taylor, N	0401 234 567	2021-09-22	Nil	Dr L Brown	45				
9	3	Walker, C	0401 234 567	2021-08-28	Nil	Dr L Brown	72				

Next click on 'Sort and Filter' button to the right-hand side of your screen and select 'Filter' from the drop-down menu (Alternatively, use the short cut keys Ctrl + Shift +L).

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4	3	Lee, E	0401 234 567	2021-10-01	
5	3	Thompson, S	0401 234 567	2021-10-01	Sort Largest to Smallest
6	3	Jones, U	0401 234 567	2019-07-06	Sort by Color >
7	3	Taylor, N	0401 234 567	2021-09-22	Sheet View
8	3	Walker, C	0401 234 567	2021-08-28	
9	2	White, C	0401 234 567	2021-08-28	∑ <u>C</u> lear Filter From "Age"
10	1	Thompson, V	0401 234 567	2021-08-27	Filter by Color
11	1	Williams, L	0401 234 567	2020-04-02	Number Filters
12	1	Brown, P	0401 234 567	2021-09-22	Number <u>r</u> itters
13	1	Brown, M	0401 234 567	2020-05-28	Search
14		Martin, R	0401 234 567	2018-07-23	
15		Thompson, K	0401 234 567	2016-11-20	-⊻ 16
16		Taylor, T	0401 234 567	2021-09-22	
17		Taylor, T	0401 234 567	2021-08-28	- 23
18	1	Kelly, G	0401 234 567	2021-08-27	- 🗹 25

Once selected, you will see arrows appear at the top of each column.

Let's filter for age. Click the arrow next to 'age'.

In the drop-down list that appears, un-tick the 'Select All' box to de-select all ages, then scroll down and re-tick only the age groups of interest.

You can now further filter for GP so that a list can be printed and given to each GP responsible if required by choosing the drop-down arrow next to the GP Name column.

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alker, C	0401 234 567		2021-08-28	A J Sort A to Z					72	
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ompson, K	0401 234 567		2021-08-28	28 Sheet View			>	85		
uyen, D	0401 234 567		2021-09-22					6	63	
hith, E	0401 234 567		2022-09-24	Sear Filter From "GP Name"				62		
ng, G	0401 234 567	0401 234 567		Filter by Color				>	63	
artin, B	0401 234 567	0401 234 567					>	82		
nith, T	0401 234 567	0401 234 567			Text Eilters				72	
ylor, H	0401 234 567		2021-09-30	1	1			2	64	
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omas, K	0401 234 567		2021-09-22		- Dr I Campt	oell			82	
ompson, A	0401 234 567	0401 234 567		021-10-01 Dr L Brown				78		
ompson, S	0401 234 567		2022-07-24						75	
hite, S	0401 234 567		2020-11-18						73	

Note: Filtering can be completed upon any column available within an Excel report by using the above process and any of the drop-down arrows next to the column name. In this way, you can filter for age, GP Name, certain conditions, appointment date etc to build your custom report.

Once you have completed filtering, click 'File' and choose 'Print' from the drop-down menu, or alternatively use short cut 'Ctrl + P' to print your results.