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

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'.
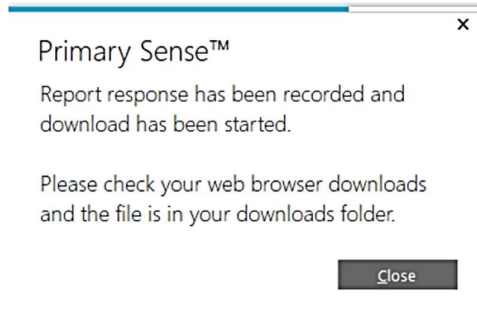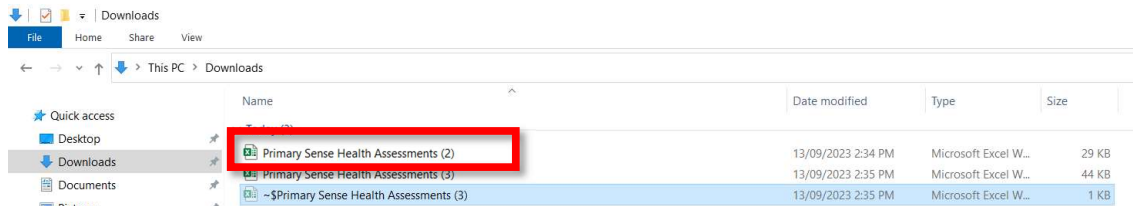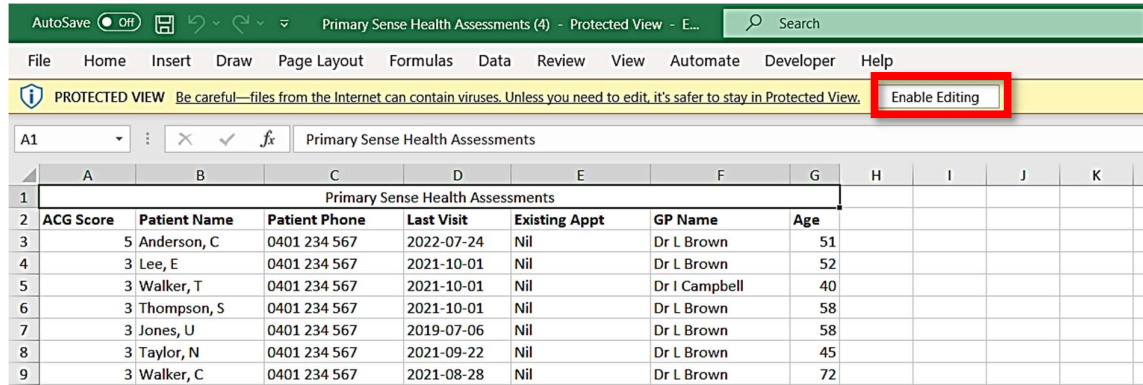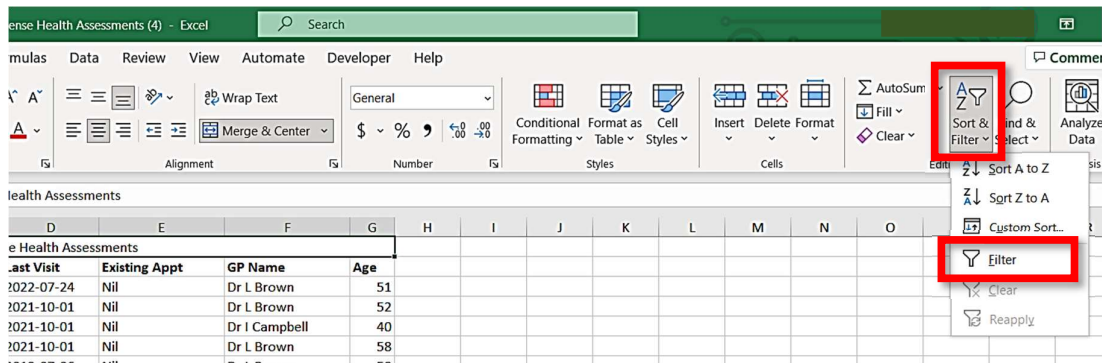
You will then receive the message below.

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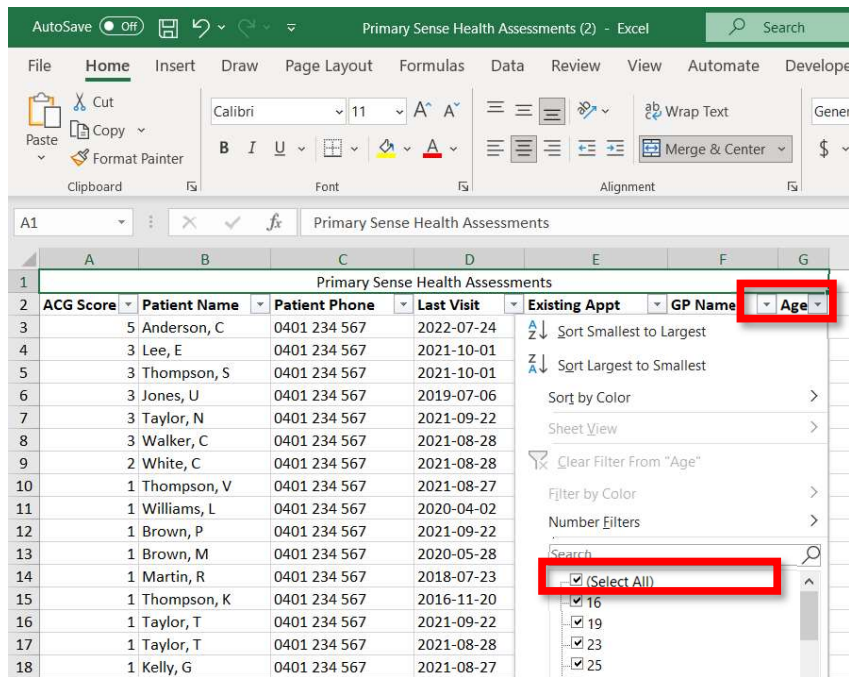

Once Excel file is opened, click on 'Enable Editing'' at the top.

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).

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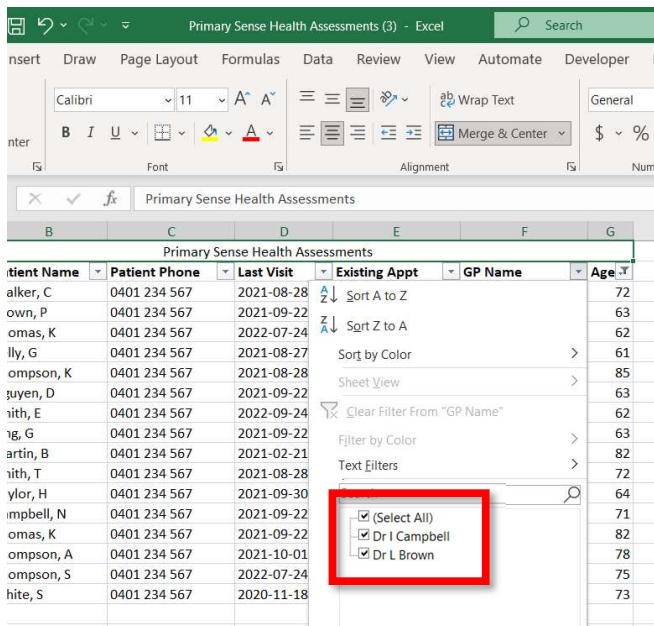
Note: Filtering can be completed upon any column available within an Excel report by using the above process and any of the drop-down arrows next to the column name. In this way, you can filter for age, GP Name, certain conditions, appointment date etc to build your custom report.

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.