

# ESR Business Intelligence

## Exporting in ESR Business Intelligence

### Introduction

This guide has been created to ensure users are aware of the different export options available within ESR Business Intelligence (ESRBI).

### Exporting to Excel

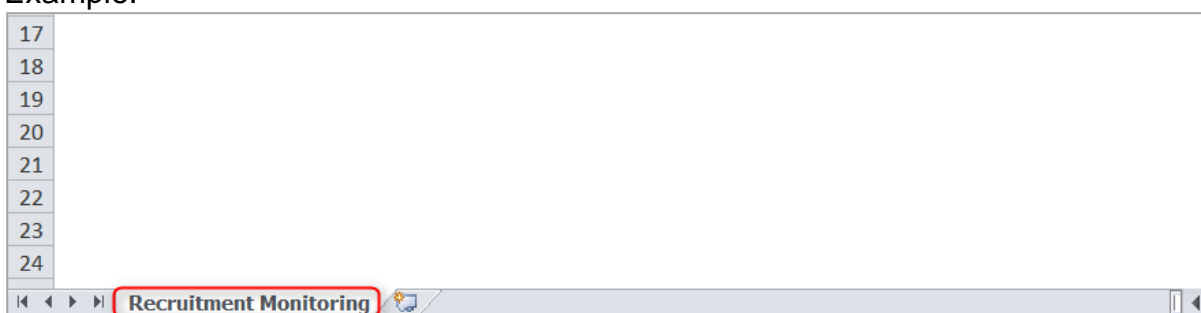
ESRBI allows users to export an entire dashboard or a single dashboard page to Microsoft Excel 2007+. When users export to Excel, the state of the dashboard (such as prompts or drill) is maintained however, some customisations and views may not be supported.

### Exporting a Single Dashboard Page

When users export a single dashboard page to Microsoft Excel, only that particular page is included in the Excel workbook. The page will automatically inherit the name of its corresponding dashboard page:



Example:



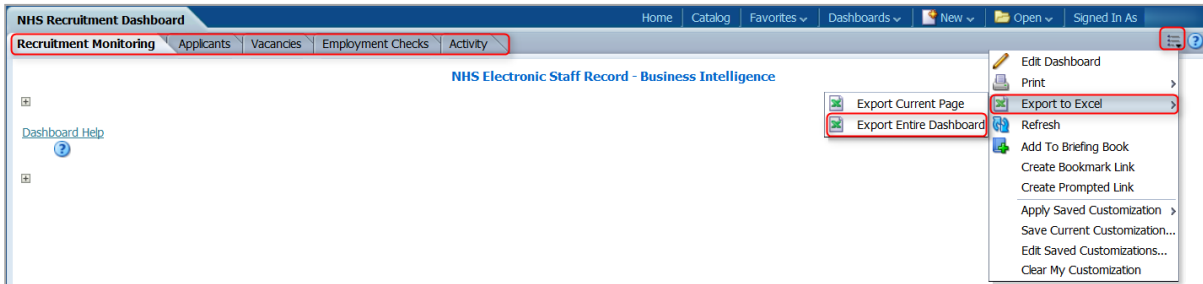
## Electronic Staff Record



**Navigation Path:** Business Intelligence > Dashboard > Page Options > Export to Excel > Export Current Page

## Exporting an Entire Dashboard

Users are able to export an entire dashboard to Excel 2007+. Where dashboards have more than one tab, the Excel workbook will contain multiple worksheets with each sheet given the name of its corresponding dashboard page:



Example:



**Navigation Path:** Business Intelligence > Dashboard > Page Options > Export to Excel > Export Entire Dashboard

**Please Note:** To ensure ESRBI remains performant, we would advise users to only export single dashboard pages rather than entire dashboards where possible.

## Exporting a Single Analysis

ESRBI allows users to export a single analysis using the Export dashboard report link available at the bottom of standard analyses. When users export a single analysis to Microsoft Excel, only that particular analysis is included in the Excel workbook:

Staff Group	Open Vacancies
	1135
Add Prof Scientific and Technic	6
Additional Clinical Services	40
Administrative and Clerical	593
Allied Health Professionals	20
Estates and Ancillary	51
Healthcare Scientists	21
Medical and Dental	17
Nursing and Midwifery Registered	49

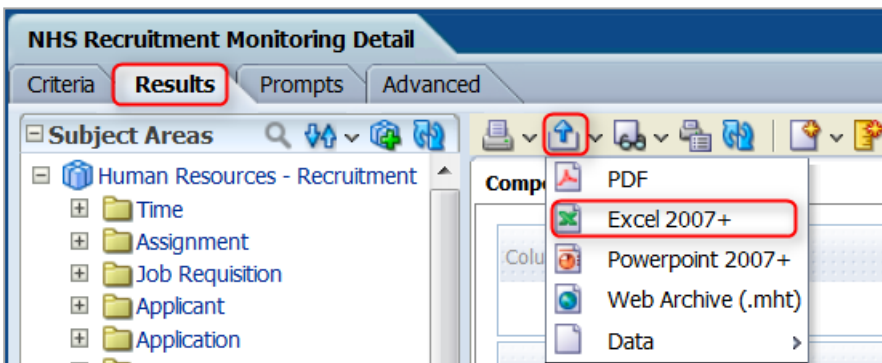
Refresh - Print **Export** Add to Briefing Book

- PDF
- Excel 2007+**
- Powerpoint 2007+
- Web Archive (.mht)
- Data

**Navigation Path:** Business Intelligence > Dashboard > Report Links > Export > Excel 2007+

### Export Analysis Results

ESRBI allows users to export analysis results outside of the dashboard using the 'Export this Analysis' option available within the Results page of the analysis. When users export your results to Microsoft Excel, only that particular analysis is included in the Excel workbook:



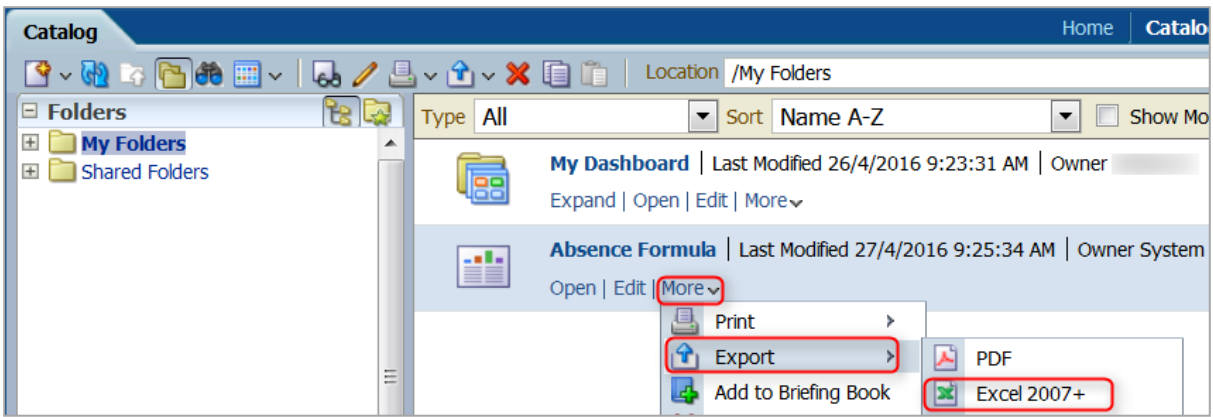
**Navigation Path:** Business Intelligence > New > Analysis > Results > Export this Analysis (Blue Arrow) > Excel 2007+

### Export from the Catalog

ESRBI allows users to export an entire dashboard or a single analysis to Microsoft Excel 2007+ directly from the Catalog:

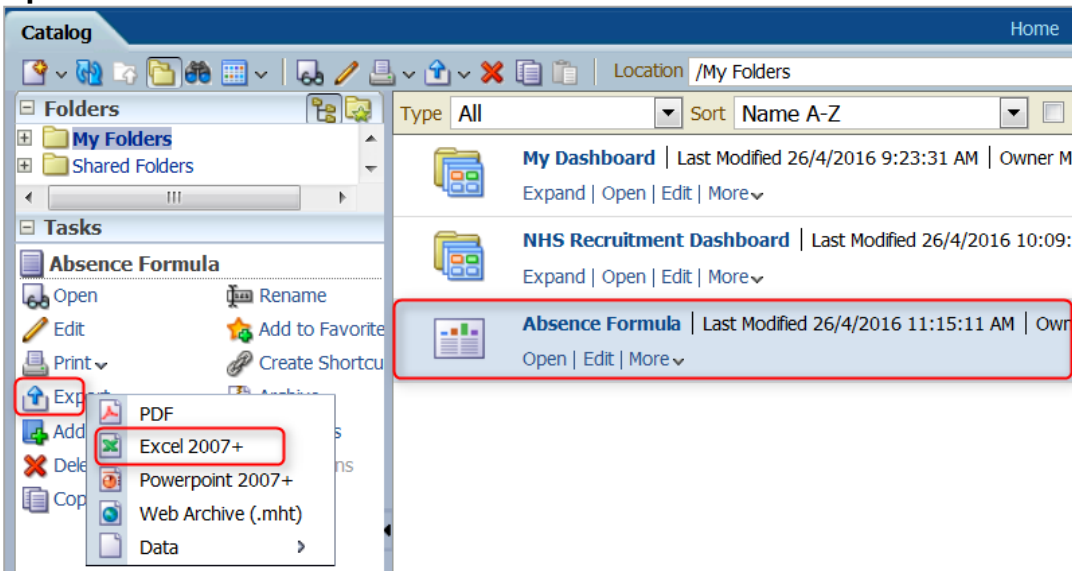
#### Single Analysis:

##### Option 1



**Navigation Path:** Business Intelligence > Catalog > Saved Analysis > More > Export > Excel 2007+

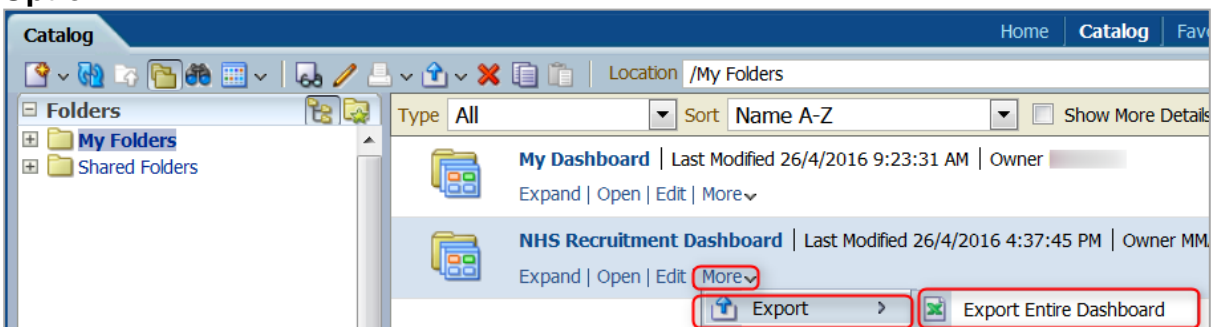
### Option 2



**Navigation Path:** Business Intelligence > Catalog > Saved Analysis > Export > Excel 2007+

### Entire Dashboard:

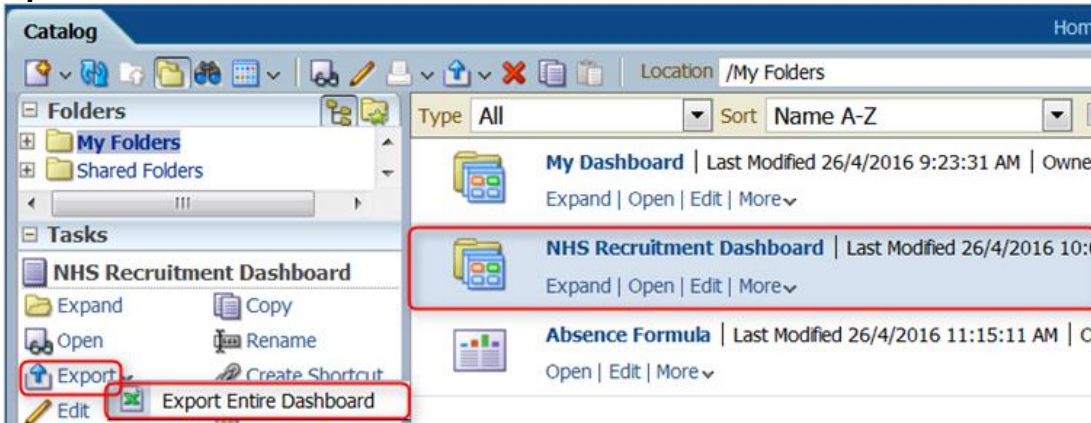
#### Option 1



**Navigation Path:** Business Intelligence > Catalog > Saved Dashboard > More > Export >

## Export Entire Dashboard

### Option 2



**Navigation Path:** Business Intelligence > Catalog > Saved Dashboard > Export > Export Entire Dashboard

### Exporting to PDF and CSV

ESRBI also allows users to export single analyses or full dashboard pages to other formats such as PDF and CSV.

Exporting a single analysis to PDF using dashboard report links:

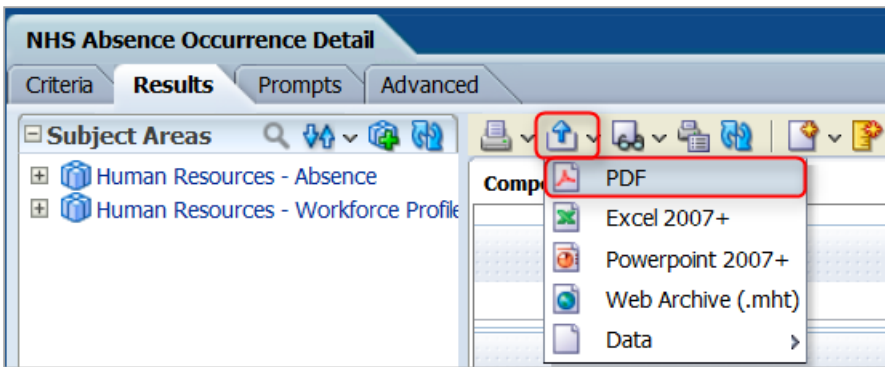
Staff Group	Open Vacancies
Add Prof Scientific and Technic	8
Additional Clinical Services	48
Administrative and Clerical	657
Allied Health Professionals	20
Estates and Ancillary	56
Healthcare Scientists	20
Medical and Dental	21
Nursing and Midwifery Registered	56
	1375

Refresh - Print **Export** - Add to Briefing Book

- PDF
- Excel 2007+
- Powerpoint 2007+
- Web Archive (.mht)
- Data

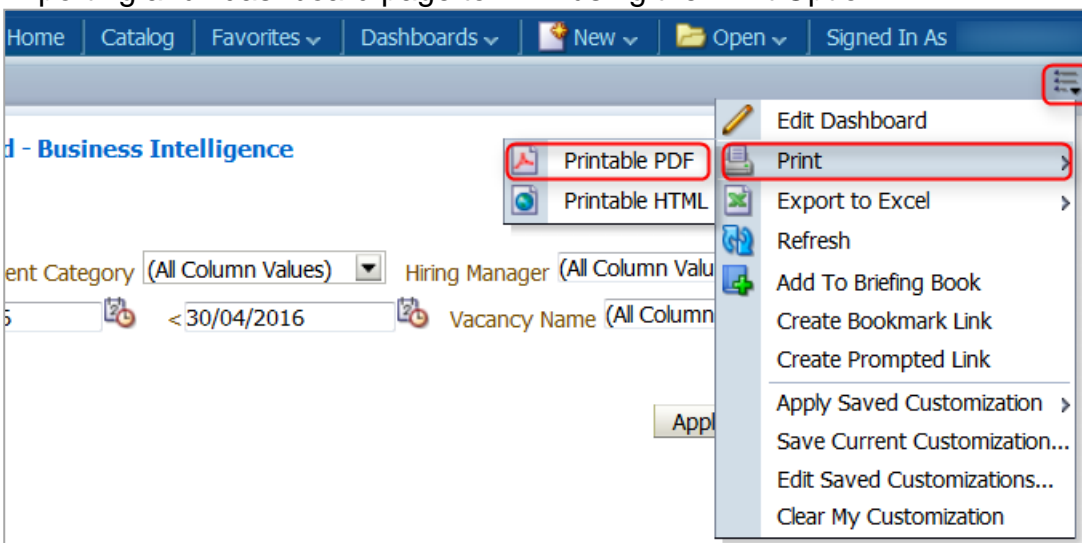
**Navigation Path:** Business Intelligence > Dashboard > Export > PDF

Exporting analysis results to PDF from the Compound View using the 'Export this Analysis' option:



**Navigation Path:** Business Intelligence > New > Analysis > Results > Export this Analysis (Blue Arrow) > PDF

Exporting a full dashboard page to PDF using the Print Option:



**Navigation Path:** Business Intelligence > Dashboard > Page Options > Print > Printable PDF

Exporting to CSV using dashboard report links:

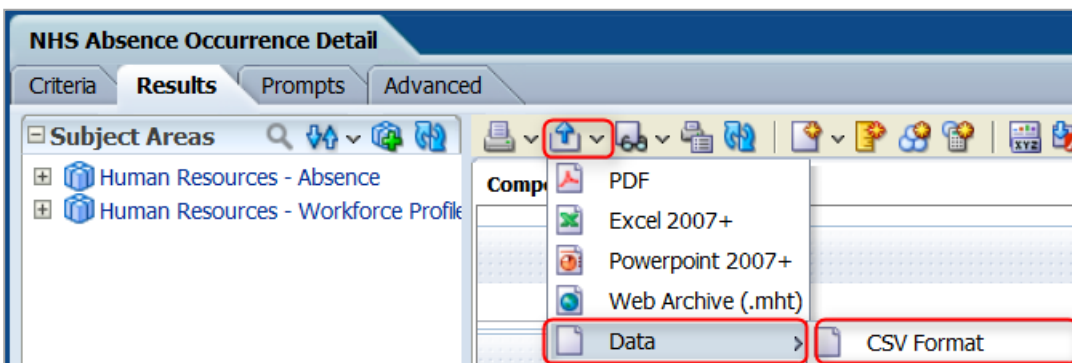
Staff Group	Open Vacancies
Add Prof Scientific and Technic	8
Additional Clinical Services	48
Administrative and Clerical	657
Allied Health Professionals	20
Estates and Ancillary	56
Healthcare Scientists	20
Medical and Dental	21
Nursing and Midwifery Registered	56
	1375

Refresh - Print - **Export** - Add to Briefing Book

- PDF
- Excel 2007+
- Powerpoint 2007+
- Web Archive (.mht)
- Data**
  - CSV Format**
  - Tab delimited Format
  - XML Format

**Navigation Path:** Business Intelligence > Dashboard > Export > Data > CSV Format

Exporting to CSV from the Compound View using the 'Export this Analysis' option:



**Navigation Path:** Business Intelligence > New > Analysis > Results > Export this Analysis (Blue Arrow) > Data > CSV Format

