

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:

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|--|-----------|------------|---------------|-----------|--------------------|---------|-----------------------------|---|
| Recruitment Monitoring Applicants Vacancies Employment Checks Activity | | | | | | | | ? |
| | | | | | | 1 | Edit Dashboard | |
| NHS Electronic Staff Re | cora - Bi | Isiness In | itemgence | | | | Print > | |
| * | | | | × | Export Current Pa | ge 🗾 📓 | Export to Excel | |
| | | | | × | Export Entire Dash | board 🚷 | Refresh | |
| * | | | | | | | Add To Briefing Book | |
| | | | | | | | Create Bookmark Link | |
| | | | | | | | Create Prompted Link | |
| | | | | | | | Apply Saved Customization > | |
| | | | | | | | Save Current Customization | |
| | | | | | | | Edit Saved Customizations | |
| | | | | | | | Clear My Customization | |
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Example:

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| 22 | |
| 23 | |
| 24 | |
| I | Recruitment Monitoring Image: All states |



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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:

| NHS Recruitment Dashboard | Home | Catalog | Favorites 🗸 | Dasht | ooards 🗸 | 📔 🎴 New 🗸 | 2 | Open 🗸 🚽 Signed In As | |
|--|--------|------------|-------------|-------|-----------|-----------------|-----|--------------------------|------|
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| Dashboard Help | | | | × | Export En | ntire Dashboard | 1 🔂 | Refresh | |
| | | | | | | | | Add To Briefing Book | |
| | | | | | | | | Create Bookmark Link | |
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Example:

| -numpi | |
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| 17 | |
| 18 | |
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| 22 | |
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| | Recruitment Monitoring / Applicants / Vacancies / Employment Checks / Activity 🔭 / 🚺 🕯 |

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 Vaca | ncies |
|------------------------------|----------|----------------|-----------|
| | | | 1135 |
| Add Prof Scientific and Tec | chnic | | 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 Reg | jistered | | 49 |
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| | 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

| Catalog | | Home |
|---|----------|---|
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Navigation Path: Business Intelligence > Catalog > Saved Analysis > Export > Excel 2007+

Entire Dashboard:

Option 1

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

Export Entire Dashboard

Option 2

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| Expand Copy | | Absence Formula Last Modified 26/4/2016 11:15:11 AM Ov |
| Edit Export Edit Export Edit | | Open Edit More ↓ |

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 Vaca | ncies |
|------------------------------|---------------------------------|---------------|-----------|
| Add Prof Scientific and Teo | 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 Reg | jistered | | 56 |
| | | | 1375 |
| Refresh - Print Export |)- <u>Add t</u> | o Briefing Bo | <u>ok</u> |
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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:

| Home | Catalog | Favorites 🗸 | Dashboards 🗸 | 🎴 New 🗸 | 🔁 Оре | en 🗸 🚽 | Signed In As | |
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| | | | | | | Clea | ar My Customization | |

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

Exporting to CSV using dashboard report links:

| Staff Group | | Open Vaca | ncies | |
|------------------------------|--------------------------------|---------------|-----------|--------------------|
| Add Prof Scientific and Tech | dd 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 Regis | tered | | 56 | |
| | | | 1375 | |
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| | /ob Ar | chive (mbt) | | Tab delimited Form |
| | ed Ar | chive (.mht) | | XML Format |
| | ata | > | | |

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



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