

From the Office of Health Informatics Reporting Portal Creating Recommended Charts in Excel April 4, 2025

Data populated from Reporting Portal reports that include an Export Data icon or populate in a spreadsheet format can be exported to Microsoft Excel to create visual representation.

Exporting Data with the Export Data Button

Various reports generated in the Reporting Portal can be exported with the **Export Data** button. The following workflow begins once data is populated in desired report.

- <u>NOTE</u>: Not all reports will have the Export Data icon. Reports that result in a spreadsheet-like format, those that do not include an Export Data icon, can be copied and pasted into an Excel spreadsheet by following the instructions provided in Step 5.
- **<u>STEP 1</u>**: Select the **Export Data** icon.
- **STEP 2:** The **Export Data** window populates. Select the desired columns from the **Available Columns** list by selecting the column name and clicking the right-pointing arrow to bring column into the **Selected Columns** list. Once all desired columns have been selected, click **OK**.
- <u>STEP 3</u>: The File Download window will populate, select Open file.
- **<u>STEP 4</u>**: The **Text Import** window populates. Deselect the Semicolon and Space boxes and select the box next to Comma. Select **OK**.
- <u>STEP 5</u>: Spreadsheet will open. Select the blank square in the top left of the spreadsheet to highlight the entire document and use **Ctrl** and **C** to copy the data.
- <u>STEP 6</u>: Open a new Excel spreadsheet document and use **Ctrl** and **V** to paste the data in the new spreadsheet.



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- **<u>STEP 7</u>**: Expand columns by hovering between each column and double-clicking when the expand icon appears.
- **STEP 8:** Highlight the columns and navigate to the **Insert** tab. Select **Recommended Charts** to view recommended chart types for the data selected.
- <u>STEP 9</u>: The Recommended Charts window will populate. Review the charts and select the desired chart. Click **OK** to create the chart.



For questions regarding process and/or policies, please contact your unit's Clinical Educator or Health Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.