

Apet®360Pro™ Procurement Portal User Guide 24



Export-to-Excel ad hoc Reports

Overview

This User Guide describes the steps involved to create a configuration file (referred to as a config file) and export provider response into an excel report.

Export to Excel provides maximum flexibility to generate Excel reports based on data stored in 360Pro™ and this flexibility is achieved through using a tailorable config file.

To export all the data in a response, you need to:

1. Download and tailor a config file (Step 3.1 to 4.3) and then
2. Use that config file to extract the data (Step 5)

Notes:

1. Provider response comments will **NOT** be exported if 'Rich Text' is enabled at the Job Info page.
2. Ensure that **NO** sections, questions or Export ID codes have exactly the same text (otherwise the report will return the first instance each time)
3. Ensure all weighted sections have a weighted question
4. Ensure Export ID codes (column I in the csv file) are **NOT** a series of numbers (e.g. 1.1, 1.1.1, 1.1.2 etc.) or excel will transform the format

1. Navigation

Login and select the 'Reports' from the menu.



Figure 1 Reports

2. Navigate to Export to Excel

Select the Export to Excel report

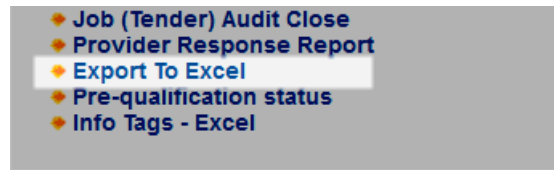


Figure 2 Export to Excel Report

3. Create the Config file

3.1. Select the Job you wish to create a report for, download the Config file, and save on your system.

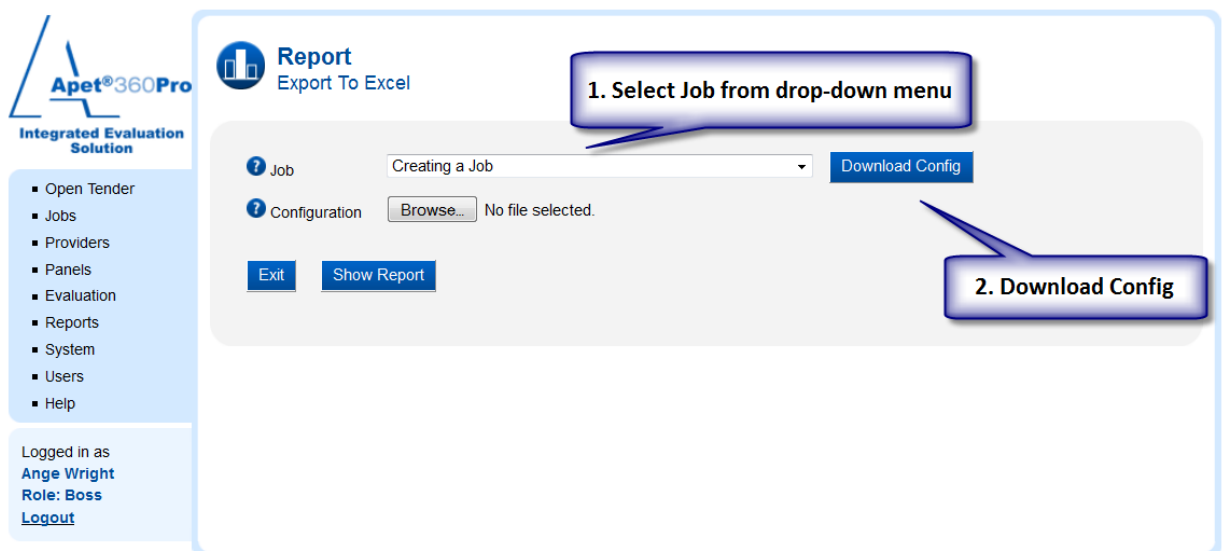


Figure 3 Create Config File

3.2. The downloaded Excel config spreadsheet will contain:

A	B	C
P	Provider Information	
S	Section name	
Q	The Question or the Export ID code used in the Import file at Column I. This used where the question is quite lengthy and it is easier to have a shortened question code.	

4. Tailor the Config file

4.1. To return the score data you require, you need to 'tag' column 'C' for the sections and questions with either a 'S' for scores or a 'R' for risk weighted scores.

A	B	C
P	Name	
P	Email	
S	Section 1	S
S	Section 2	S
Q	The first Question of Section 1	S
Q	The second Question of Section 1	S
Q	The first Question of Section 2	S
Q	The second Question of Section 2	S
Q	The third Question of Section 2	S

4.2. To return the required data, 'tag' the relevant Sections and Questions. This is done by placing a value in the appropriate cell that nominates the width of the column in the generated report.

A	B	C	D	E	F
P	Name				
P	Email				
S	Section 1	S			
S	Section 2	S			
Q	The first Question of Section 1	S	10	20	20
Q	The second Question of Section 1	IR	10	20	20
Q	The first Question of Section 2	S	10	20	20
Q	The second Question of Section 2	S	10	20	20
Q	The third Question of Section 2	S	10	20	20

Column C returns the weighted scores for sections and the average score for the question. A setting of 'IR' is used to return Risk weighted scores, which is being phased out.

Column D returns the 'Statement' selected by the Provider in responding to the Job. The value of "10" refers to the width of the column in characters when the report is generated.

Column E returns the response free text provided by the Provider in the Response box. This may be quite a large amount of text.

Column F returns the returns the comments by the evaluators. This presented as the Evaluator's User ID; the score; and then the comments. Where there are multiple Evaluators, the data is concatenated.

4.3. Save the spreadsheet in .xlsx format.

5. Produce a Report

To produce the Export to Excel report

5.1. Select the Browse button, and select your config file.

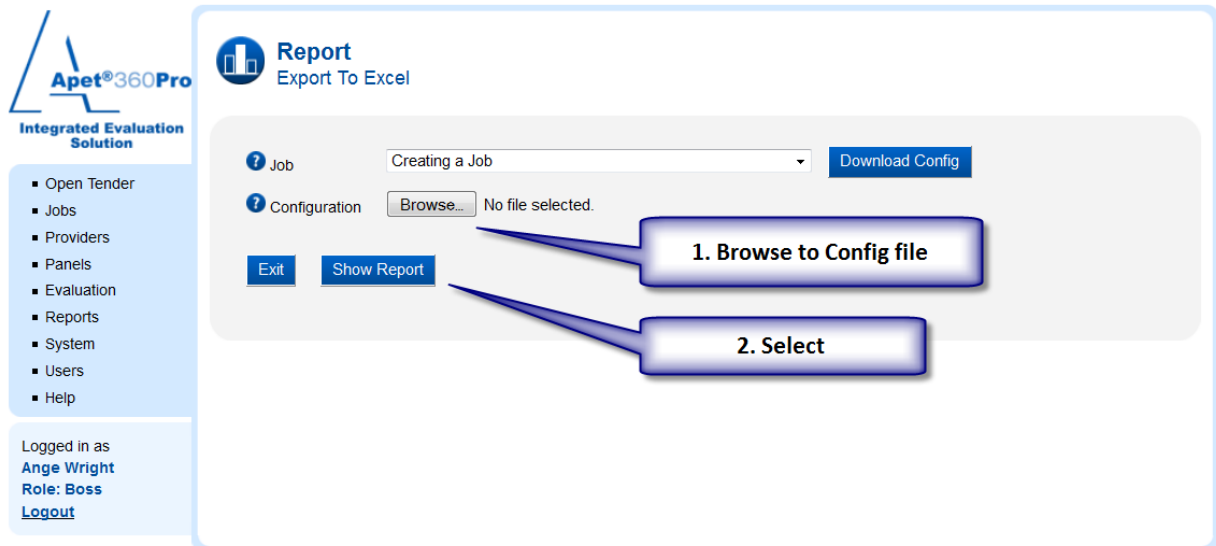


Figure 4 Produce a Report

5.2. Select the 'show report' button to run the report and export the Excel spreadsheet.

5.3. Save the exported Excel spreadsheet. The reports shows each Provider on a single row and the data against their response grouped into columns by Question. You can now sort and tailor the data to suit (see example below).

Example Export Report

Provider ID		Capacity	1. Briefly and clearly demonstrate your organisation's capacity to provide executive coaching services consistent with the Statement of Requirement.				2. Describe your resource pool and the depth of resources you have available with particular attention given to resource availability from time to time in relation to the Statement of Requirement.			
Name	Email	Rating	Statement	Response	Rating	Evaluations	Statement	Response	Rating	Evaluations
8Points	admin@8points.com.au	60%	Response provided	Provider's response	60%	Evaluator's comments	Response provided	Provider's response	60%	Evaluator's comments
4Stars	admin@4stars.com.au	57%	Response provided	Provider's response	52%	Evaluator's comments	Response provided	Provider's response	62%	Evaluator's comments
Joe Bloggs	joe@blog.com.au			Section Skipped			Section Skipped			