



**The modern, fast and easy to use risk analysis tool**

## **Exporting Data in Version 3.6**

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## Introduction

BowTie Pro™ has a wide range of outputs and multiple of reports all included at one price. This enables the user to extract the data they require, in the format needed, for many situations. The information can be exported as either images or as data

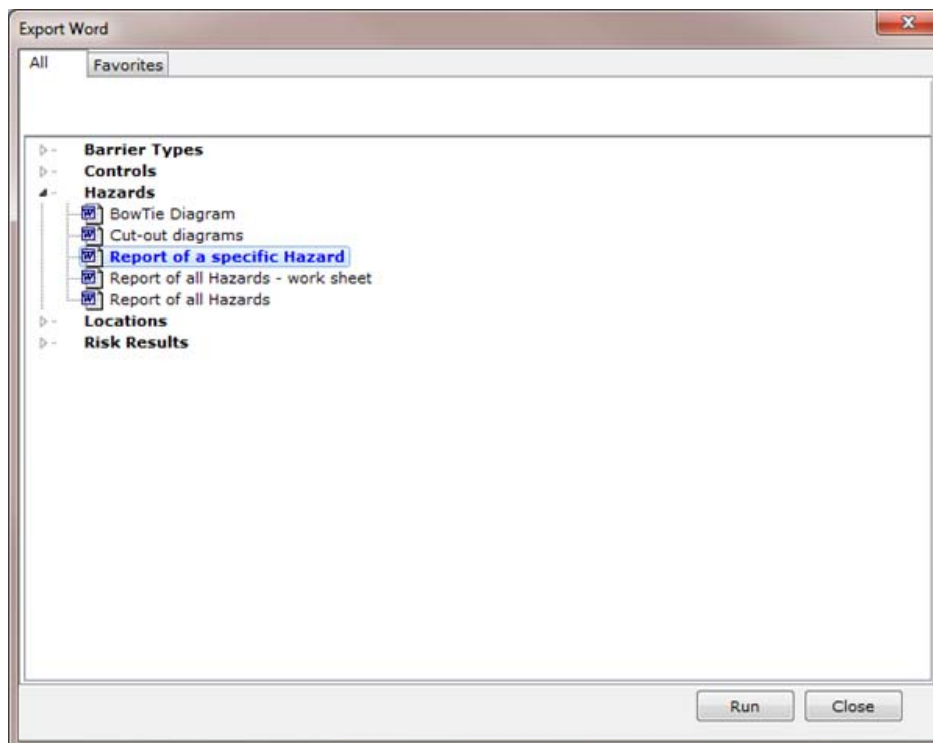
Some of the available outputs are as follows:

- ✓ **Word Reports** – A wide variety of outputs direct to Microsoft Word.
- ✓ **Hazard PDF Book** – saves a hazard diagram to a single PDF file
- ✓ **Diagrams** - this will export the bowtie, LOPA and Incident diagrams as displayed on the screen to either a Printer, Graphics File or
- ✓ **Standard Reports** - These are predefined templates that are then populated with the data from within the currently open BowTie Pro™ file or hazard.
- ✓ **Custom Reports** – Create your own ad hoc reports
- ✓ **Custom Excel Outputs** – Create your own Excel exports
- ✓ **Analysis Exports** - lets you export analysis data to MS Excel.
- ✓ **Export To Excel** - Creates an MS Excel worksheet from a list of predefined templates.
- ✓ **Publish to HTML** – This option allows the user to save their work onto a website
- ✓ **Other Exports**

## Word Reports

The word report feature generates outputs that can be opened in Microsoft Word. The Reports are categorised into groups, that can then be expand to allow the report to be viewed.

To Open the screen select “Outputs-> Word Reports” from the toolbar. The screen to below will now be displayed



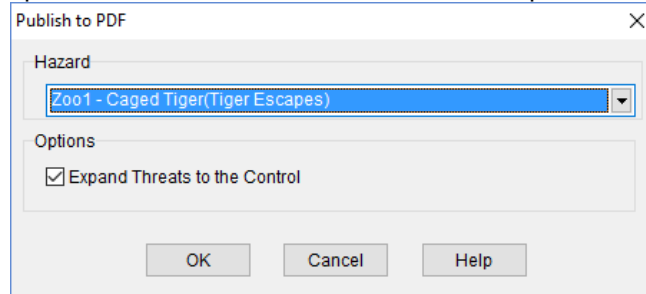
Once you select the appropriate category the available reports will appear.

When you select “Run” it will ask what file name should be used and if any selection is required then this will be done on a popup screen.

## Hazard PDF Book

The "Publish to PDF" option allows a hazard diagram to be saved on a branch by branch basis to a single PDF file.

From the toolbar select Outputs-> Hazard PDF Book. You will now be presented with the following screen



You will need to select an individual hazard and there is an option to also include the Threats to the Controls (also called escalation factors) then press the OK button.

An example can be viewed at <http://www.bowtiepro.com/examples/htmllexport/hazardref.htm>




## Diagrams

When printing bowtie diagrams the output will be in line with the hazard on the screen with the same items expanded and contracted.

The diagrams can be output to three possible destinations. These are:

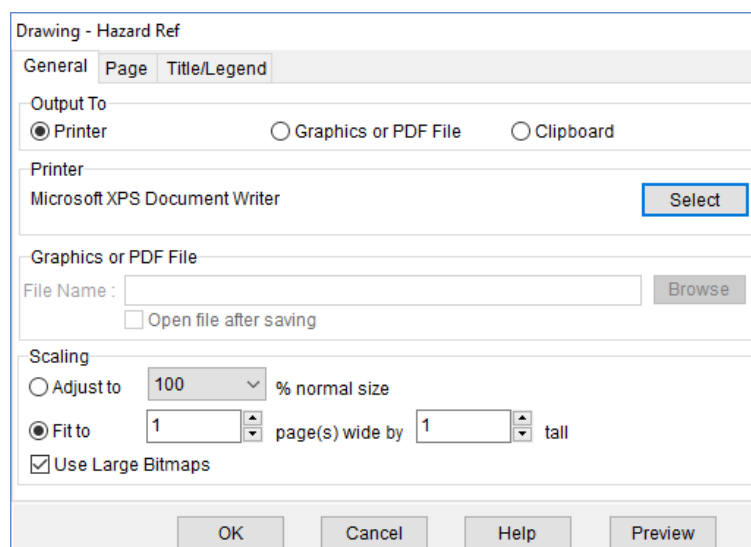
- Printer
- Graphics File
- Windows Clipboard

The best way to export to either the graphics file or the windows clipboard is to select the Print Screen button on the toolbar or on the File menu .

The screen shows all the options that are possible and is split into three tabs:

- General
- Page
- Title/Legend

### General

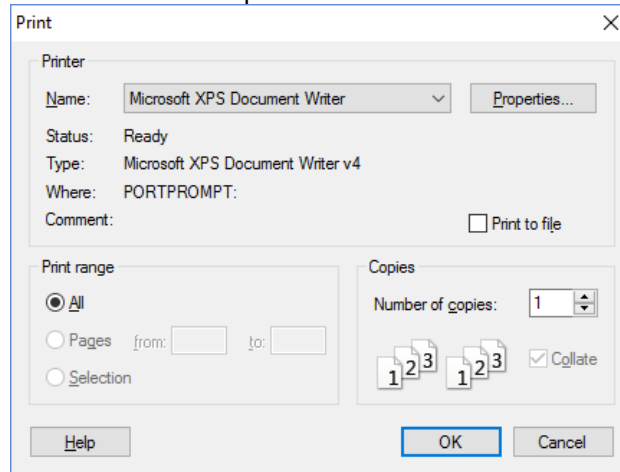


This page allows you to determine the output destination (Printer, Graphics File or Clipboard). As you select each option the screen will refresh and turn on/off all the options as appropriate.

The scaling is common to all three types of output. By default the "Adjust to" option will be the same setting as used in the bowtie diagram. When outputting to the printer you can also select "fit to" which will use a scale to allocate the diagram to a desired number of pages wide and tall.

### Printer:

If you are outputting to a Printer you can select the destination printer via the button entitled "Properties". This will show you the name of the printer that is currently selected but when you press properties you will be given the option to change it on the screen and select a different printer. When you first open this screen it will use the printer which is set as the default printer in windows and use its settings ie Portrait, A4 etc



### Graphics File:

The graphics option allows you to browse to a graphics file which will be created when you press "OK". The file types available are:

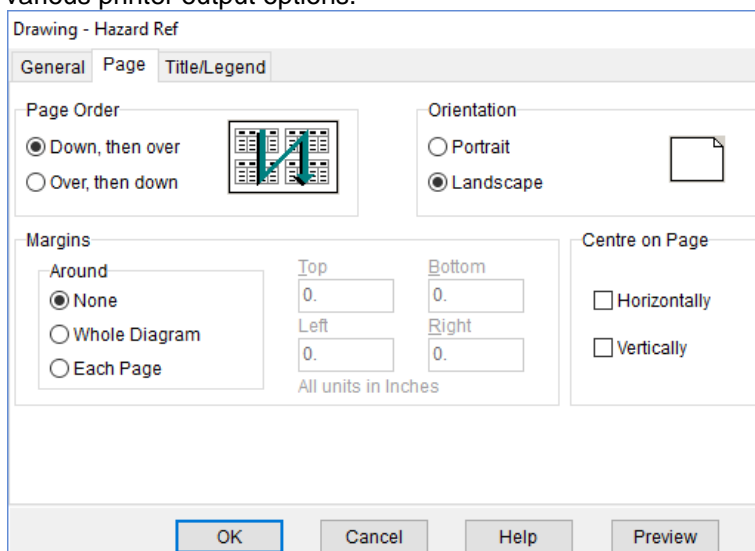
- JPEG (JPG) (the default option)
- CompuServe Graphics Interchange File (GIF)
- Windows Enhanced Metafile (EMF)
- Windows Bitmap (BMP)
- Tagged Image Format (TIF)
- Portable Network Graphics (PNG)

### Clipboard:

The Clipboard option allows the diagram to be placed as the next item that can be pasted into another program such as MS Word

## Page

The Page tab shows various printer output options.

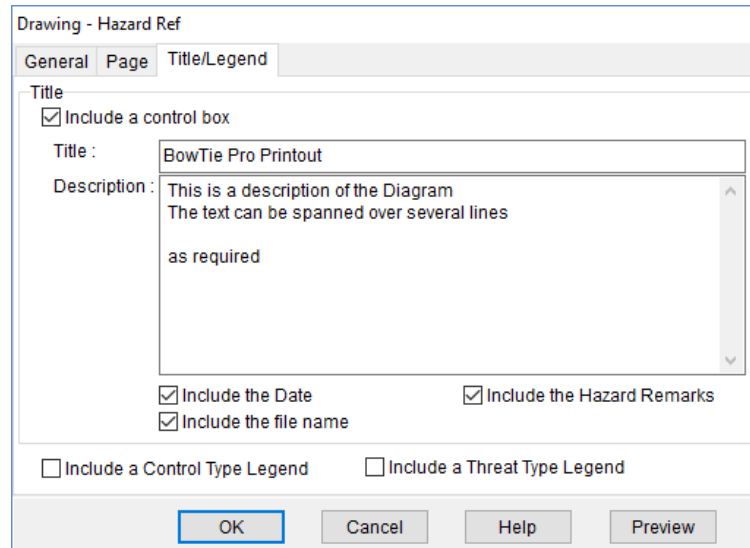


- Page Order determines the order that the pages print out.
- Orientation is either Portrait or Landscape

- Margins can allow a border around each page, around the diagram as a whole or none at all. The margins can be in either inches or cm depending on which units you chose to use in the “**Program Options**” screen.
- Centre on Page allows the diagram to be placed on the page when outputting to a printer. The default position is top left.

## Title/Legend

The Title/Legend tab allows you to put a control box and/or the Control Type legend on the diagram, as shown below:

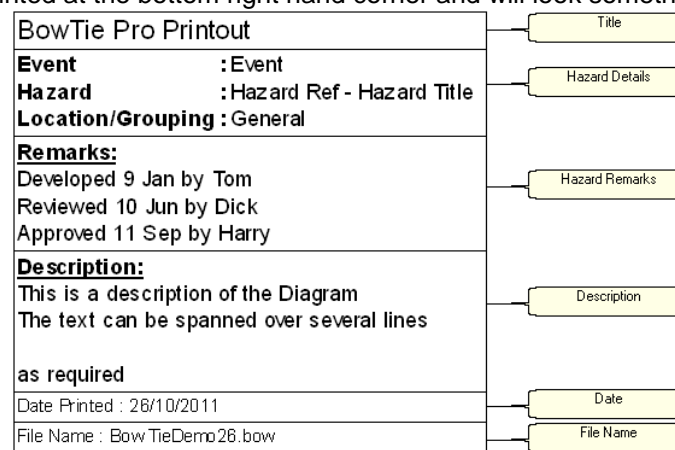


### Control box

- Once turned on, the Title can be either the name of your company, project or other description
- A description of the diagram can be entered.
- Include the Hazard Remarks
- If you wish the date to be printed
- If you the file name to be printed





*N.B.* If you leave any boxes blank either on this screen or in the file summary info screen then these will not be printed in the control box.

The output is always printed at the bottom right hand corner and will look something like the following:




### Control Type and Threat Type Legends

The legend prints in the very bottom right hand side of the diagram, under the Control box if printed. They only includes the types used on the extended section of the diagram.


Control Types:	
	Statutory Control
	Company Control
	Control under development
	un-defined

### Print Preview

Using the print preview button is a way of determining what you will obtain from the printer. The screen can be accessed from the toolbar and from file menu via  button. There is also a "Preview" button on the general print screen.


### Best results to PDF or Paper

For best results in your printouts follow the following procedure:

1. Expand the diagram until you have the picture you wish to output
2. Press the Print Preview button  on the toolbar
3. Press the "Setup" button
4. Select the general tab and check the "Fit to 1 page wide by 1 page tall"
5. Select the Page tab and select "landscape" in the orientation
6. Select the title and complete if required.
7. Press "OK" at the bottom of the screen.

### How to put a Diagram into MS Word

For best results in your printouts follow the following procedure:

1. Expand the diagram until you have the picture you wish to output
2. Press the print button 
3. Click the "Clipboard" option in the Output to section
4. Press the "OK" button
5. Open MS Word
6. Press the Paste button
7. The image will appear in MS Word


## Standard Reports

Reports are predefined templates that are then populated with the data that is within the currently open BowTie Pro™ file or hazard.














There are two kinds of reports:

- File Reports.
- Hazard Reports

The hazard reports can also be printed using the Bulk Hazard Printer

All the reports will open up in the Workspace with an icon of  displayed in the top left hand corner. Reports work slightly differently from the bowtie diagrams.

The toolbar is separate from the main toolbar and is on the same screen as the report. This allows you to manipulate the report using the following items:

	<b>Print</b>	Prints the report to the currently selected printer.
	<b>Print Setup</b>	Sets the properties of the Printer
	<b>Export PDF</b>	Export the data to PDF format
	<b>Export</b>	There are a number of formats to choose to export the data to including Text, HTML and CSV.
	<b>Refresh data</b>	This may be required if you have gone back to the diagram and made some changes
	<b>Show/Hide the Group Tree</b>	The group tree is on the left hand side of the screen and allows you to quickly move to the start of a new section. By default this is shown in overall reports and hidden in hazard reports
	<b>Zoom In</b>	
	<b>Scale</b>	This is the zoom factor of a report. Most of the items are percentages
	<b>Zoom Out</b>	
	<b>Move To First Page</b>	This button will allow you to move to the first page if there are more than one page on the report
	<b>Move to Previous Page</b>	This button will allow you to move to the page before the current one if there are more than one page on the report
	<b>Move to next Page</b>	This button will allow you to move to the page after the current one if there are more pages on the report
	<b>Move to Last Page</b>	This button will allow you to move to the last page on the report
	<b>Find</b>	This will bring up a box which will allow you to search all the text on the report for a word or phrase you are looking for

## File Reports

File Reports are applicable to the BowTie Pro™ file that is currently open ie QA reports.

These reports are opened up from the "file reports" tab in the data browser.

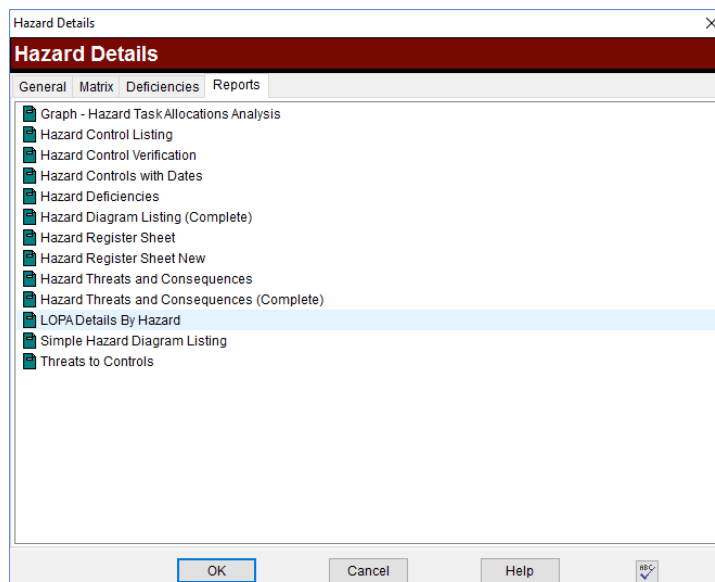
Select the report you require and then double click on the item and it will open up.

- ▶ Quality Reports
- ▶ Control Threats by Party
- ▶ Control Threats by Type
- ▶ Controls by Code
- ▶ Controls by Party
- ▶ Controls by Type
- ▶ Controls vs Code
- ▶ Copy of Controls by Type
- ▶ Critical Task Listing
- ▶ Deficiencies by Action Party
- ▶ Deficiencies by Priority

## Hazard Reports

Hazard Reports are specific to the currently selected hazard.

The hazard reports are selected from either the reports option in the tree, from the hazard drawing or from the hazard screen.

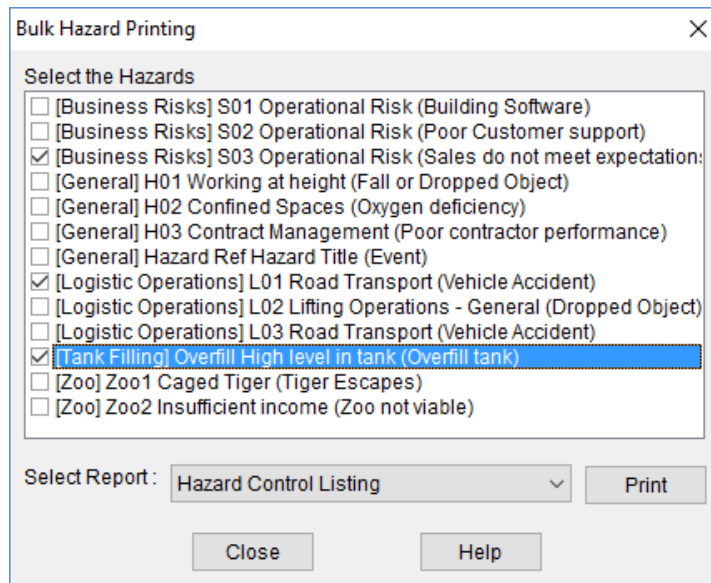


To open them up right click on the item and then select Reports and then the name of the report you want ie Hazard Register. This will then open the report.

### ***Bulk Hazard Printer***

Bulk Hazard printing allows a report to be printed for multiple hazards. This feature is particularly useful when trying to produce the final outputs for a report.

To open the module go to Diagrams -> Bulk Hazard Reports from the menu bar. This will open the screen shown below.



Bulk Hazard Printing

Select the Hazards

- [Business Risks] S01 Operational Risk (Building Software)
- [Business Risks] S02 Operational Risk (Poor Customer support)
- [Business Risks] S03 Operational Risk (Sales do not meet expectation:
- [General] H01 Working at height (Fall or Dropped Object)
- [General] H02 Confined Spaces (Oxygen deficiency)
- [General] H03 Contract Management (Poor contractor performance)
- [General] Hazard Ref Hazard Title (Event)
- [Logistic Operations] L01 Road Transport (Vehicle Accident)
- [Logistic Operations] L02 Lifting Operations - General (Dropped Object)
- [Logistic Operations] L03 Road Transport (Vehicle Accident)
- [Tank Filling] Overfill High level in tank (Overfill tank)
- [Zoo] Zoo1 Caged Tiger (Tiger Escapes)
- [Zoo] Zoo2 Insufficient income (Zoo not viable)

Select Report : Hazard Control Listing

Print

Close Help

From the list of hazards select each one in turn. This will place a tick at the left hand side of the hazard name. Next select the report you wish to print from the drop down list and then press the "print" button.

Once the reports have printed the hazards will stay selected and you can either close the screen or print another report for the hazards.



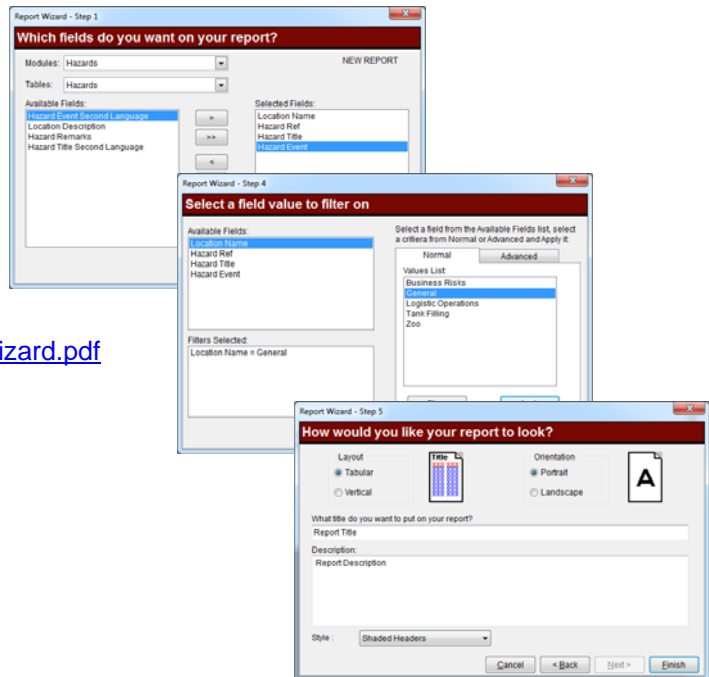
## Custom Reports

Custom reports allow the creation of saveable export data formats from BowTie Pro™ into PDF or MS Word format. The creation of the reports is done through a series of wizards leading the user down the following process

- Select fields
- Select groups
- Set sort order
- Select filter
- Determine the layout of the report

This is discussed in more details in document “Custom Reporter - Using the Wizard to create Reports”

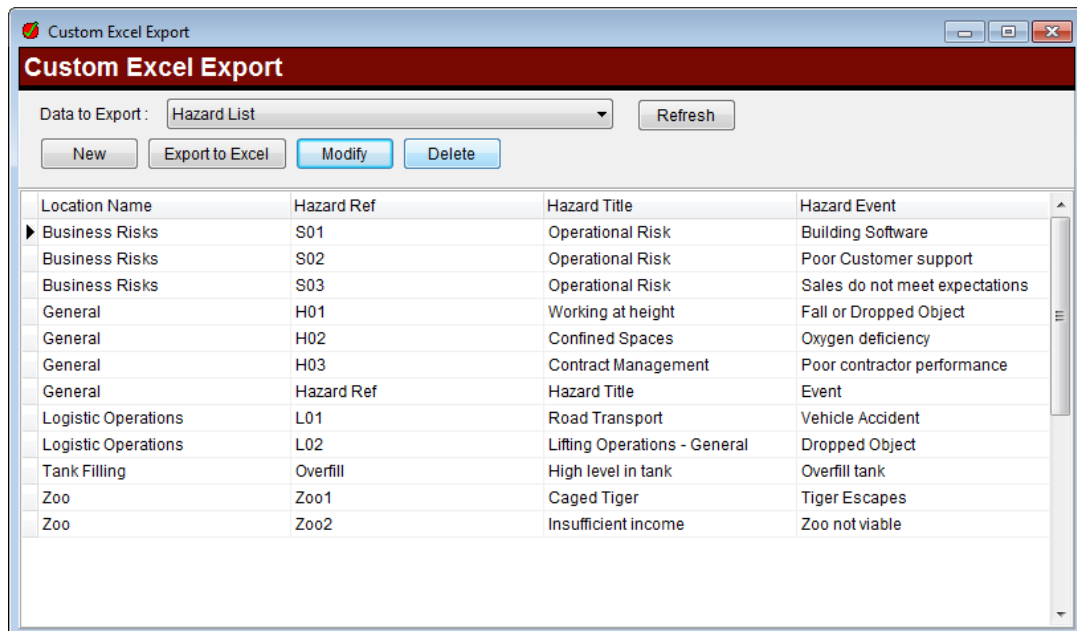
<http://downloads.bowtiepro.com/CustomReportWizard.pdf>



## Custom Excel Exports

Custom Excel Exports uses some of the screens from the custom reports wizard system to determine MS Excel exports. The Wizards process is:

- Select fields
- Set sort order
- Select filter



Location Name	Hazard Ref	Hazard Title	Hazard Event
Business Risks	S01	Operational Risk	Building Software
Business Risks	S02	Operational Risk	Poor Customer support
Business Risks	S03	Operational Risk	Sales do not meet expectations
General	H01	Working at height	Fall or Dropped Object
General	H02	Confined Spaces	Oxygen deficiency
General	H03	Contract Management	Poor contractor performance
General	Hazard Ref	Hazard Title	Event
Logistic Operations	L01	Road Transport	Vehicle Accident
Logistic Operations	L02	Lifting Operations - General	Dropped Object
Tank Filling	Overfill	High level in tank	Overfill tank
Zoo	Zoo1	Caged Tiger	Tiger Escapes
Zoo	Zoo2	Insufficient income	Zoo not viable

## Analyse Exports

Many of the Analysis screens have the ability to export data to MS Excel. The analysis screens that have this functionality are:

- Risk Register
- Risk Register Images
- Critical Tasks
- Hazard Category Matrix
- People Matrix
- Document Matrix
- Deficiencies
- Permitted Operations
- Permitted Operation Boundaries

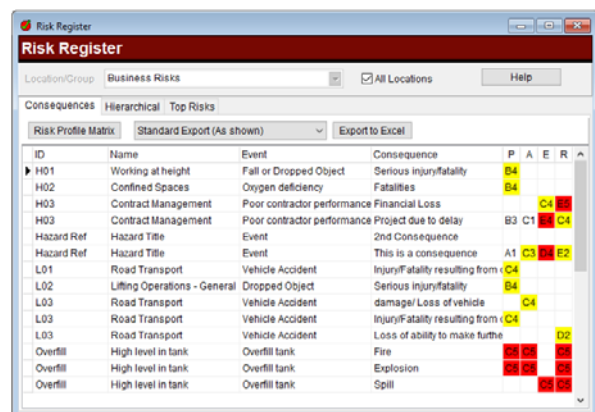
In most of the Analysis screens the export is the data that is displayed on the analysis screen in question. The Risk Register and Critical Tasks Listing also has the ability to select variable MS Excel predefined formats.

For Risk Register these are:

- Standard (as shown on the screen)
- Standard with Consequence Controls
- Hazard Register Tree
- Hazard Register Tree with Tasks

For Critical Tasks the options are:

- Standard as shown
- Critical Task Listing
- Task by Party
- Controls by Party

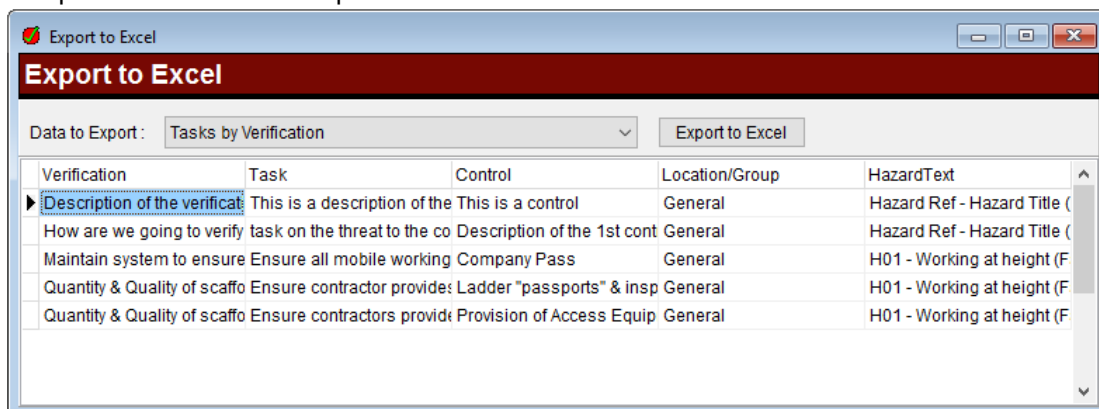


ID	Name	Event	Consequence	P	A	E	R
H01	Working at height	Fall or Dropped Object	Serious injury/fatality	B4			
H02	Confined Spaces	Oxygen deficiency	Fatalities	B4			
H03	Contract Management	Poor contractor performance	Financial Loss			C4	
H03	Contract Management	Poor contractor performance	Project due to delay	B3	C1		C4
Hazard Ref	Hazard Title	Event	2nd Consequence				
Hazard Ref	Hazard Title	Event	This is a consequence	A1	C3	D4	E2
L01	Road Transport	Vehicle Accident	Injury/Fatality resulting from	C4			
L02	Lifting Operations - General	Dropped Object	Serious injury/fatality	B4			
L03	Road Transport	Vehicle Accident	damage/ Loss of vehicle			C4	
L03	Road Transport	Vehicle Accident	Injury/Fatality resulting from	C4			
L03	Road Transport	Vehicle Accident	Loss of ability to make furthe				D2
Overfill	High level in tank	Overfill tank	Fire	C4	C4		
Overfill	High level in tank	Overfill tank	Explosion	C4	C4		
Overfill	High level in tank	Overfill tank	Spill			C4	

## Export to Excel

The "Export to Excel" option allows the user to output a static snapshot of the data into an MS Excel spreadsheet for further manipulation.

The screen is opened by going to the Outputs -> Export to Excel. When you open the screen it allows export of a predetermined list of exports.



Verification	Task	Control	Location/Group	HazardText
► Description of the verificat	This is a description of the	This is a control	General	Hazard Ref - Hazard Title (
How are we going to verify	task on the threat to the co	Description of the 1st cont	General	Hazard Ref - Hazard Title (
Maintain system to ensure	Ensure all mobile working	Company Pass	General	H01 - Working at height (F
Quantity & Quality of scaffo	Ensure contractor provide: Ladder "passports" & insp		General	H01 - Working at height (F
Quantity & Quality of scaffo	Ensure contractors provid: Provision of Access Equip		General	H01 - Working at height (F

When you first open the screen and select the output you would like from the "Data to Export". It will show a preview of the data in a grid. This can then be exported by pressing the export button.

Requests for additional outputs can be made by contacting [support@BowTiePro.com](mailto:support@BowTiePro.com).

## Publish to HTML

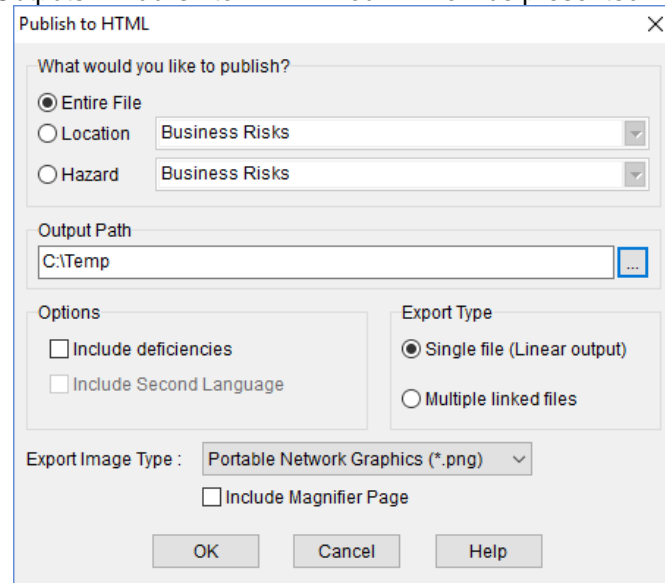
The "Publish to HTML" option allows the user to save their work onto a website without the need for the BowTie Pro™ Web Viewer.

Unlike the Web Viewer, the published option creates a static snapshot of the data.

There are three options for an export

- Publish the entire file
- A specified location/group
- Publish a hazard.

From the toolbar select Outputs-> Publish to HTML. You will now be presented with the following screen



You can select either an individual hazard, a location or the whole file then enter your output path.

The options allow some control over the diagram data that will be exported and the image type. The entire diagram will be exported not just the expanded section as is the case when you print the diagram.

There is a drop down list to select the type of image you wish to include but it is recommended that you keep this as a PNG as these are the smallest in size.

The "Single file" option will give you a large web page whereas the "Multiple files" option will create many small web page's with each one containing just one section of the diagram eg one page for each Control, each Threat etc.

When using the "Multiple files" option it is recommended that you select a new directory so that it does not create conflicts with other BowTie Pro™ files.

When the export is complete it will ask you if you want to open the web page. At the top of the page is an image from which you can click on to move to the selected item.

An example can be viewed at

<http://www.bowtiepro.com/examples/pdfexample.pdf>

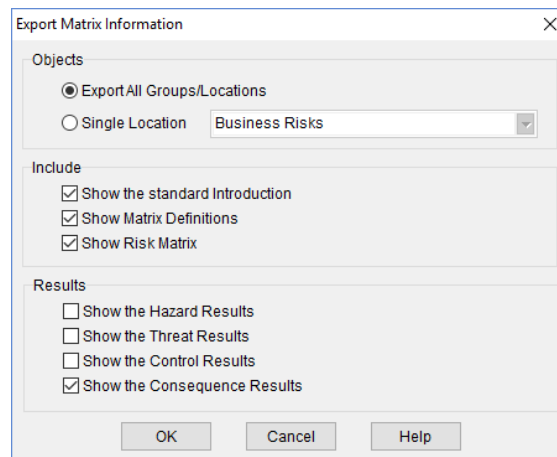


## Other Exports

There is also a range of specialist exports. Many of these exports were created as a result of specific requests from clients.

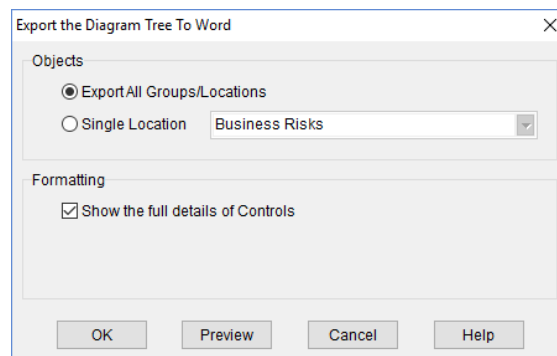
### ***Export Matrix Report to MS Word***

The Export Matrix Report to MS Word option allows images of any assessed matrixes within either a file or a location/group to be output easily to MS Word.



### ***Export Diagram Tree to Word***

The export diagram tree to MS Word lets you print the diagram into MS Word as a bulleted tree.



### ***Export Hazard Diagrams Report to Microsoft Word***

The Export Hazard Diagrams Report to Microsoft Word option allows all the bowties within either a file or a location/group to be output easily to MS Word.

