

## Quick Start Guide

Questions? Contact [sarasupport@aimsplatform.com](mailto:sarasupport@aimsplatform.com)

### 1 What data can I access? What actions can I take?

#### Data Access

- Sara Alert user account information for users in your assigned jurisdiction
- You will not have access to individual monitoree records or the analytics summary

#### Actions

- Add, manage, and audit Sara Alert user accounts
- Assign jurisdictions
- Assign and modify user roles
- View/export list of users in your jurisdiction
- Reset passwords and lock accounts
- Configure Two-factor authentication
- Enable users' API access

### 2 How do I add a new Sara Alert user?

1. Login to the Administrator dashboard, select "Add User"
2. Enter the new user's email address
3. Configure the user's jurisdiction and role
4. Click "Save" to complete the process

### 3 What are the different roles I can assign?

Administrators should assign a new user the role with the fewest capabilities and least record access required to perform their job.

Capability	Enroller	Public Health	Public Health Enroller	Contact Tracer	Analyst	Adminis-trator	Super User
Enroll New Exposed Monitoree	✓		✓	✓			✓
Enroll New Case	✓		✓	✓			✓
Add Close Contacts		✓	✓	✓			✓
Enroll Close Contacts			✓	✓			✓
View/Modify Enrollment Details	✓	✓	✓	✓			✓
View Monitoring Line Lists		✓	✓	✓			✓
View/Modify Monitoring Actions		✓	✓	✓			✓
View/Add/Modify Symptom Reports		✓	✓	✓			✓
View/Add Lab Reports		✓	✓	✓			✓
Transfer Records		✓	✓				✓
View History/Add Comments		✓	✓	✓			✓
Import records		✓	✓				✓
Export Records		✓	✓				✓
View and export analytics		✓	✓		✓		✓
Add/modify system users						✓	✓
View list of system users						✓	✓
Record Access	Only records added by the user	All records in jurisdiction	All records in jurisdiction	All records in jurisdiction	None; View Aggregate Data Only	None; Manage users in jurisdiction	All records and users in jurisdiction