# Sara Alert™

Secure monitoring and reporting for public health

## Quick Start Guide

# How to Use the Custom Export Builder

**Questions?** Contact sarasupport@aimsplatform.com

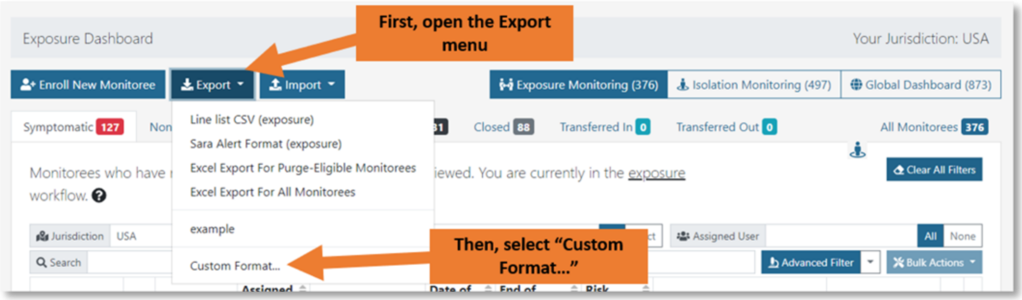
## How to use the Custom Export Builder:

The Custom Export builder allows Public Health, Public Health Enrollers, and Super Users to design and save export formats that only contain specific monitoree records and data of interest. A user may perform a custom export once per 15 minutes. The export will be sent to the user's email address. Users can save up to 100 custom formats.

**1**

### From the Monitoring Dashboard, click "Export" and select "Custom Format."

Click "Export" button and select "Custom Format" to open the Custom Export Format builder window.

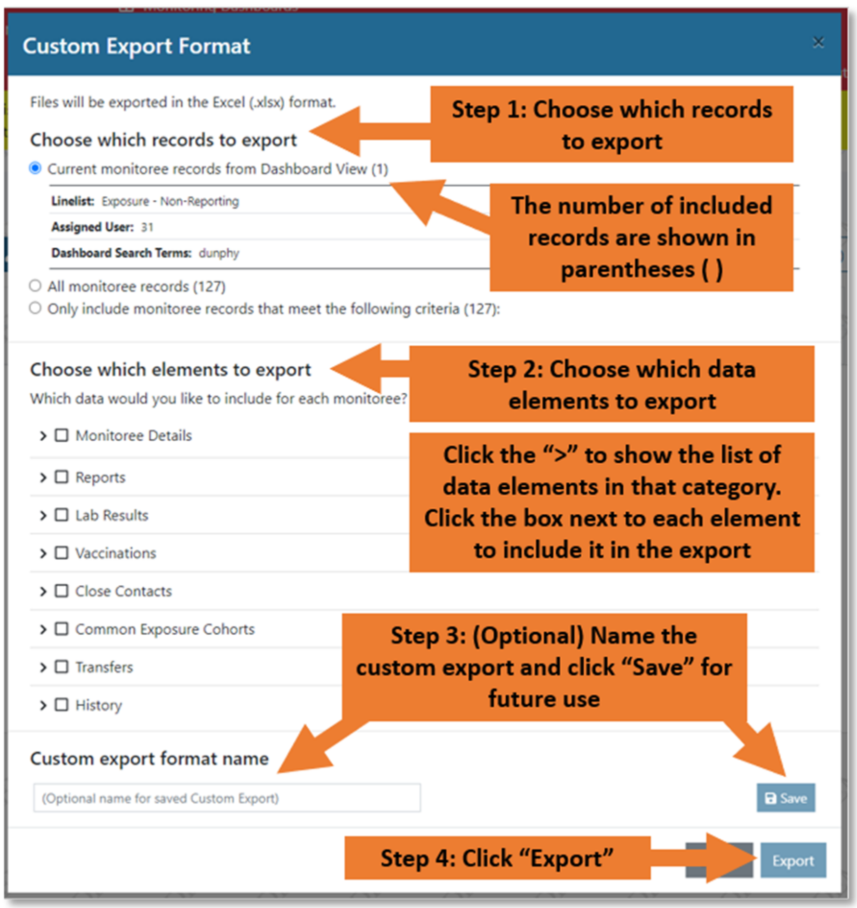



*Select "Custom Format" from the Export dropdown*

**2**

### Build the custom format by selecting records and data elements to export.

Next, build the custom format in four steps. First, select which records to export. Users can export the records from their current dashboard view, all monitoree records, or records that meet specific search criteria. Next, select which data elements to export. Each element section will export as a separate tab within the export file. Then, if desired, add a name and click "Save" to save the format for future use. Click "Export" to finish.




*Select which records and data elements to export, and save the export if desired*





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# Custom Export Scenarios

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**Use these possible export scenarios as a guide when building custom export formats:**

| Scenario | Records Selected | Data Elements Selected |
|---|---|---|
| Export all monitoree details data for all monitorees visible from your current dashboard view, including any active filters. | Select "Current monitoree records from Dashboard View." | Select "Monitoree Details" to export all data elements in that category. |
| Export the Sara Alert IDs for records that meet the parameters in a saved Advanced Filter. | 1. Select "Only include monitoree records that meet the following criteria."<br>2. From the Advanced Filter button drop-down, select the desired saved filter. | Select "Sara Alert ID" by expanding the following elements: Monitoree Details > Enrollment Info > Identification and Demographics > Identifiers. |
| Export the names and primary phone numbers for all monitorees assigned to a specific Assigned User | 1. Select "Only include monitoree records that meet the following criteria."<br>2. In the filter view, enter the desired Assigned User value. | 1. Select "First Name" and "Last Name" by expanding the following elements: Monitoree Details > Enrollment Info > Identification and Demographics > Name.<br>2. Select "Primary Telephone" by expanding the following elements: Monitoree Details > Enrollment Info > Contact Information > Primary Contact Information. |
| Export the end of monitoring date for all monitorees in the Exposure workflow on the Non-Reporting line list. | 1. Select "Only include monitoree records that meet the following criteria."<br>2. In the filter view, select the Exposure workflow from the "Workflow" drop-down, and select Non-Reporting from the "Line List" drop-down. | Select "End of Monitoring" by expanding the following elements: Monitoree Details > Monitoring Info > Monitoring Period. |
| Export all History data for all monitorees across both workflows. | Select "All monitoree records." | Select "History" to export all data elements in this section. |
| Export all potential exposure information and common exposure cohort data for all monitorees across both workflows. | Select "All monitoree records." | 1. Select "Potential Exposure Information" by expanding the following data elements: Monitoree Details > Enrollment Info.<br>2. Select Common Exposure Cohorts to export all data elements in this section. |
| Export all transfer data for monitorees in a specific sub-jurisdiction. | 1. Select "Only include monitoree records that meet the following criteria."<br>2. In the filter view, select the desired sub-jurisdiction from the "Jurisdiction" drop-down. | Select "Transfers" to export all data elements in this section. |
| Export the contact information for all monitorees that have not reported in at least two days. | 1. Select "Only include monitoree records that meet the following criteria."<br>2. In the filter view, click the "Advanced Filter" button to open the Advanced Filter window. Select the "Latest Report (Relative Date)" filter, choose the "custom" operator, and select "greater than 2 day(s) in the past" from the drop-down selections. Click "Apply." | Select "Contact Information" by expanding the following data elements: Monitoree Details > Enrollment Info > Monitoring Period. |



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