Export Data Request

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Overview of Export Data Request

Overview of Export Data Request Tool

Export Data Request tool has been added to allow the data export of large data sets. By introducing this tool a user can choose to export data set then proceed with their day to day work and return to a central window to access the data when it is ready to be exported. This will aid users in continuing their day to day function without having to be delayed due to large data set export.

This process will be enabled by default for any export process that has the option to export all pages. Admin users will also be granted access to this window by default. For granting access to the Export Data Request window review the Export Data Request Settings.

Export Data Request Settings

Settings for Export Data Request tool

There is a role and a company setting applicable to the Export Data Request tool.

The role will grant users access to the Export Data Request window. By default this role is enabled and limited to admin users. Admin users can choose to enable this role for additional users as needed keeping in mind this will in some instances allow the export of PHI data out of the database.

The company setting will allow the practice to specify the amount of time that will be allocated to downloading the exported data. By default this is set to 120 seconds. In most instances this should suffice. However, if the user is experiencing network degradation or the data set being downloaded is extremely large this may need to be adjusted to account for it.

Accessing the Export Data Request Role:

Setup portal -> Roles -> Reporting groups -> Export Data Request screens

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Practice - Population Health				EMR - Nurse/MA		0	0	0	
General				EMR Setup	<u> </u>	<u> </u>	0	0	
Practice - Room Tracking				Full Prescription Access		0	0	0	
Setup				Medical Assistant	۲	0	0	0	
Practice - Scheduler				Mobile Financials		0	0	0	
Processing Schedule Setup				Mobile Mail	\bigcirc	0	0	0	
Security				Mobile Patient		0	0	0	
Table Maintenance				Mobile Schedule	\bigcirc	0	\bigcirc	0	
User Setup				Mobile Task	\bigcirc	0	\circ	0	
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General	•			OfficeMD	\bigcirc	\bigcirc	\bigcirc	0	

Accessing the Data Export Request Timeout:

Setup portal -> Company Settings -> Data Export Request Timeout

<mark>⊖</mark> • s	etup: Company Settings	
Setting Value	Data Export Request Timeout Q 120	
Rule	Integer value between 30 and 300	*
Tool Tip	Data Export Request Timeout in seconds	
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Accessing Export Data Request

Accessing Export Data Request Tool

To access the Export Data Request tool, users will go to the Reports portal and then select Export Data Request, found under the General section header. This will open the Export Data Request download tool where users can see exports that have been generated by their username. The export files will remain in the Export Data Request window for up to 3 days, at which point if not removed by the user there will be a nightly job that will clear the queue on their behalf. This will help maintain this list with only recent exports.

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Display Fields;

- ID: unique identifier of the file generated for exporting.
- Type: window type where the file was generated from.
- Description: window name where the file was generated from.
- Expiration: date when the file will be removed from the Export Data Request list for your user.
- Created: date the file was generated.
- Message: error message if an error occurs while generating the file.
- Status: current status of the file being generated (Completed, In Progress, or Error).
- Action: actions available for the file (Download or Remove).

Footer options;

- When exporting save file in download folder: by default the download option will save files to the browser set folder for downloaded files. However if the browser is set to a different folder and the user chooses to send the file being downloaded to the download folder the user can select this option instead of updating the browser set download folder.
- Refresh: this will refresh the Export Data Request window including the file status.

Utilizing Export Data Request

Utilizing Export Data Request Tool

Generating a export file;

- 1. Go to any table search control window (ex. Appointment report).
- 2. Perform your query.
- 3. Once you have your results click the gear icon on the right upper corner of the window.
- 4. Click Print.
- 5. Select the "Excel all pages (Accessible in the Reporting Portal General/Export Data Request)" option.

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Appt. Date	Status	Туре 🗮	Prior Auth.	Co	omplaint	Referring	≡	Re	source	Chart Number 🚍	Patient First	Screen
1/01/2024 08:45:00	Patient Ready	New GYN				Automated Fax Provider	1	Donald Doct	or MD	25064	Wes	Company
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1/05/2024 10:15:00	Checked-Out	New GYN			• E	xcel - all pages (Accessible in eneral/Export Data Request)	the Rep	orting Portal		25064	Wes	Test
1/08/2024 11:00:00	Scheduled	Initial Evaluation		insominia						26210	Ranjani	Rameshnivasan
1/08/2024 15:15:00	Scheduled	Follow up							-	24794	Anthony	Doe
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1/10/2024 15:00:00	Scheduled	Kidney Cancer		Kidney Cancer				Stephanie Ly	nch MD	24891	Kevin	A
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6. A toast message will appear on the right lower corner of the window informing you that your request is being processed.



Utilizing the Export Data Request to manage your export files;

- 1. Go to the Reports portal.
- 2. Under General section select Export Data Request.
- 3. The Export Data Request window will display the files generated by your user for the current date.
- 4. Under Action you can choose to download the file or remove the file.

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**The refresh on the right lower corner of the Export Data Request window will refresh the list of files including the file status.

**A file may appear with a "In Progress" status if the file is still being compiled. If this occurs refresh until the status reflects as "Completed" prior to downloading the file.