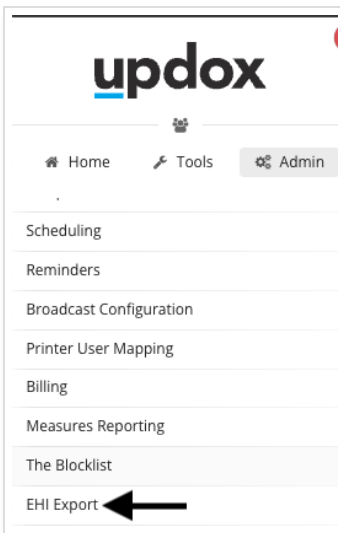


# Navigating the Dashboard



Last Modified on 12/14/2023 11:35 am EST

You can manage your patient and practice EHI export requests on the dashboard. To access the dashboard, go to **Admin** and select **EHI Export**.



The EHI Export Dashboard will start out empty, but as you add requests you will be able to see information about each request that is still active.

After 30 days (from the date a request has finished processing and is available for download), the request will move to the Archived tab. You will still be able to view the details of the request once it is archived, but the downloadable files will be permanently deleted and no longer available.

The screenshot shows the EHI Export Dashboard. The 'Dashboard' tab is selected. There is a 'New Export Request' button. The dashboard shows 'Active 2' and 'Archived 0'. A search bar is present with the text 'Filter results ...'. The table shows 2 results.

Name	Requested Date	Due Date	Status
Full_Export	11/3/2023 1:49 PM		Ready
Sample_Patient_Export	11/2/2023 12:43 PM	11/3/2023	Ready

## Searching and Sorting

You can quickly search for a specific request by typing into the search field. If something is visible in the Dashboard, you should be able to search for it. To sort your requests, click on the column headers to sort by that column.

## EHI Export

# Dashboard

Active **2**
Archived **0**

✕

▲ Name	▲ Requested Date
Sample_Patient_Export	11/2/2023 12:43 PM

## Viewing Request Details

To view more information, you can just click anywhere in the row to expand the request details and audit log. The Activity column will show the timeline and status changes while a request is processing and after it completes.

Menu **updox**
BW

EHI Export
DASHBOARD

## Dashboard

New Export Request

Active **2**
Archived **0**

Showing 2 results

▲ Name	▲ Requested Date	▲ Due Date	▲ Status
Full_Export	11/3/2023 1:49 PM <small>by Brendan Wilberton</small>		✔ Ready
Sample_Patient_Export	11/2/2023 12:43 PM <small>by Brendan Wilberton</small>	11/3/2023	✔ Ready

## EHI Export Request Statuses

The request status will show the current state of the requests you have initiated.

**Archived** – A request that was completed more than 30 days ago and no longer can be downloaded.

**Error** – A request that failed while processing that will need to be resubmitted.

**In Process** – A submitted request that is processing but not yet ready for download.

**Ready** – A request that has completed processing and is now ready to be downloaded.

## Downloading Exports

Once an export has a status of Ready, it is ready for download. Click anywhere on the row to access the request details.

Your request may contain multiple files which will be available for download in the **Actions** column. Click on each hyperlink to download each file individually to your local device. You will then be able to open and unzip each file to access the contents on your device.

Note, the date your request is scheduled to be archived will also be viewable in this column.

### Dashboard New Export Request

Active **2** Archived **0**

Q Filter results ... Showing 2 results

Name	Requested Date	Due Date	Status
Full_Export	11/3/2023 1:49 PM		Ready
Sample_Patient_Export	11/2/2023 12:43 PM	11/3/2023	Ready

**Details** | **Activity** | **Actions**

**Requested:** Folder Items, Continuity of Care Documents  
From 1/1/2023  
To 11/2/2023

**Results:**

- 101 Folder Items
- 74 Documents
- 60 Images

**Export Requested**  
Brendan Wilberton  
11/3/2023 1:49 PM

**Export Ready for Download**  
Updax Export Engine  
11/3/2023 1:54 PM

**Downloaded (Full\_Export\_00001.zip)**  
Brendan Wilberton  
11/3/2023 1:57 PM

Full\_Export\_00001.zip | 4.64 MB

Scheduled for archive on  
12/3/2023 12:00:00 AM EST