



INSTRUCTIONS FOR EXPORTS: WHAT YOU NEED TO KNOW TO UTILIZE THEM FULLY

I. BASIC ASSUMPTIONS

The software, throughout, offers you the ability to export data for deeper analysis or for transfer into another package (e.g., A1A's expense reporting program).

All exports are provided in .csv format. This is a standard file format that is readily accessed in Excel or another spreadsheet or database package.

Instructions for individual users are as follows:

II. EXPORTING: WHERE AND HOW

1. Login. The screens that allow exporting include Roster, Schedule, Search, Surgeons, and Admin screens (if applicable to the given user.)

2. For Roster: In addition to being able to print an employee list, or to create labels for all employees, you can also export employee contact information data.

Run a desired search (e.g., all locations or sorted by a given location) and click on Export current search in the gray bar.

3. For Schedule: For pending surgeries only, you can elect to export in standard or Outlook format. For all other surgeries (i.e., completed, closed, and canceled) you can use the Standard export link.

Sort the schedule as you desire, simply by clicking on the column header of your choice, then click Standard export. Again, you will save a .csv file.

4. For Search: Click on Schedule, then Search. Just like Schedule, you have both the Outlook and standard exports. With Search, you can define your export file in whatever manner you chose, for example by sales team, for a given date range, without or without picksheets.

5. For Surgeons: Click on Schedule, then Surgeons. Sort the surgeons however you desire, for example by those that have been scheduled, associated with a team, or those with an elected specialty. Then, consistently, click the Standard export link.

NOTE: For surgeons, like Roster, you can also print mailing labels.

III. WHAT EXPORTS CAN DO FOR YOU

1. Allow you to grab and save critical data in a designated manner, for example for a given period of time, for a selected surgeon or facility, or with needed parameters (e.g., had a picksheet).

2. Allow you to manipulate data in Excel or another package.

3. Allow you to extract schedule and surgeon data in order to use it in another program, if needed.

We are glad to help you with any exports! Just contact support with your specific question.