

SESAP Quick Start Guide

How to use advanced finds and export your data

This document will provide guidance on how to:

- **System Views**
 - **Actions and AFIs**
 - **Tasks**
- **Exporting to Excel**
- **Advanced Finds**

System Views

Within the Self- Evaluations and Actions or AFI entities you will have the option of using different system views. These are currently split by an SE, Action or AFI being active or inactive. The table below shows the categorisation.

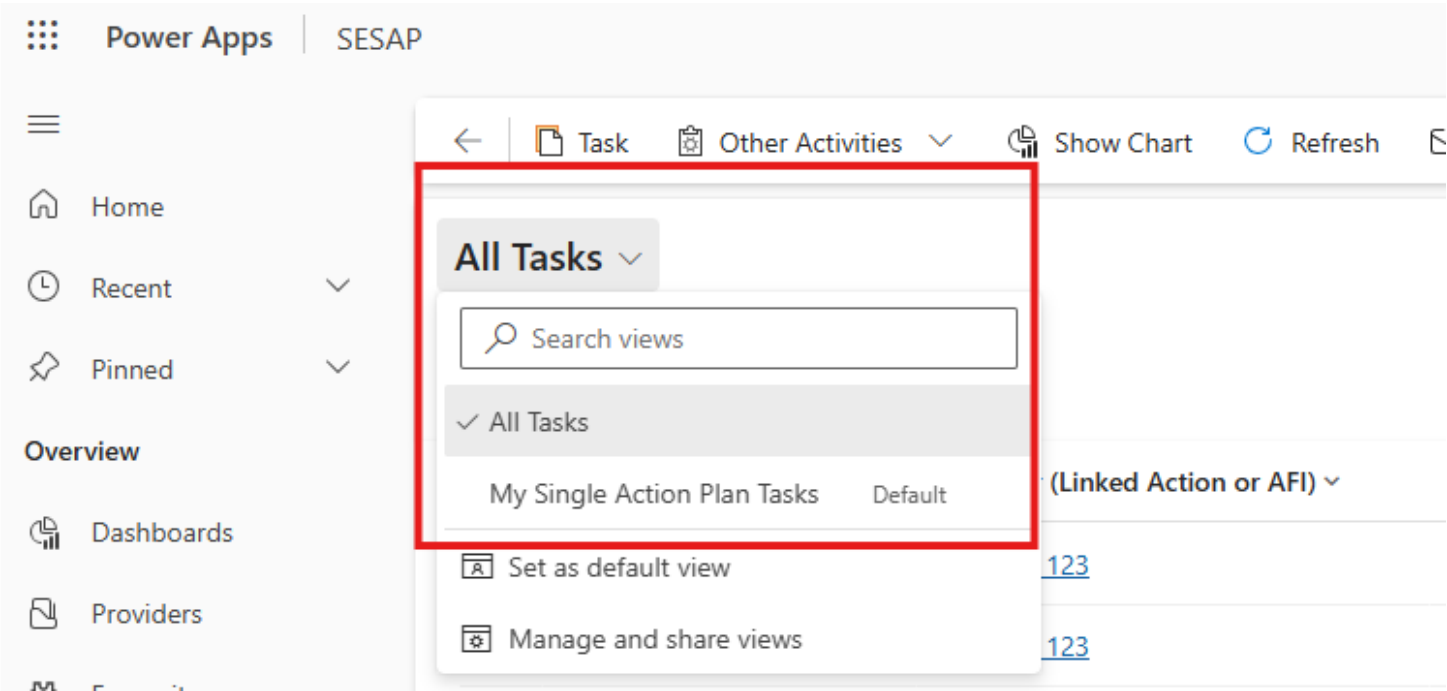
Note: you will not have any inactive Self-Evaluations

Status	Status Reason
Inactive	Archived
Inactive	Removed
Active	Not Started
Active	In Progress
Active	Completed
Active	Overdue

1. You can use the dropdown beside the Active Actions or AFI to move between inactive and active Actions and AFIs:

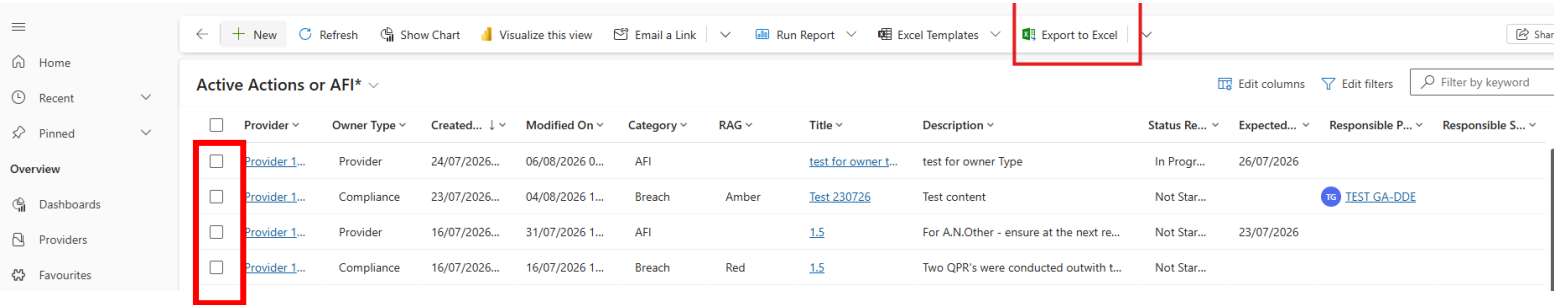
The screenshot displays a web application interface. On the left is a sidebar with navigation icons and labels: Home, Recent, Pinned, Overview, Dashboards, Providers, Favourites, Notifications, Self-Evaluation, Single Action Plan, Actions or AFI (highlighted), and Tasks. The main content area has a top bar with '+ New', 'Refresh', 'Show Chart', 'Visualize this view', and 'Email a Link'. Below this is a dropdown menu titled 'Active Actions or AFI*' with a search bar and two options: 'Active Actions or AFI*' (marked as 'Default') and 'Inactive Actions or AFI'. Below the dropdown is a table with columns: 'Modified On', 'Category', 'RAG', and 'Provider 1...'. The table contains several rows of data, including 'Provider 1...' and 'NTP Oper...'. The interface also includes a sidebar with navigation links like 'Home', 'Recent', 'Pinned', 'Overview', 'Dashboards', 'Providers', 'Favourites', 'Notifications', 'Self-Evaluation', 'Single Action Plan', 'Actions or AFI', and 'Tasks'.

2. For Tasks, you will have the default of My Tasks, All Tasks are being used by internal SDS teams

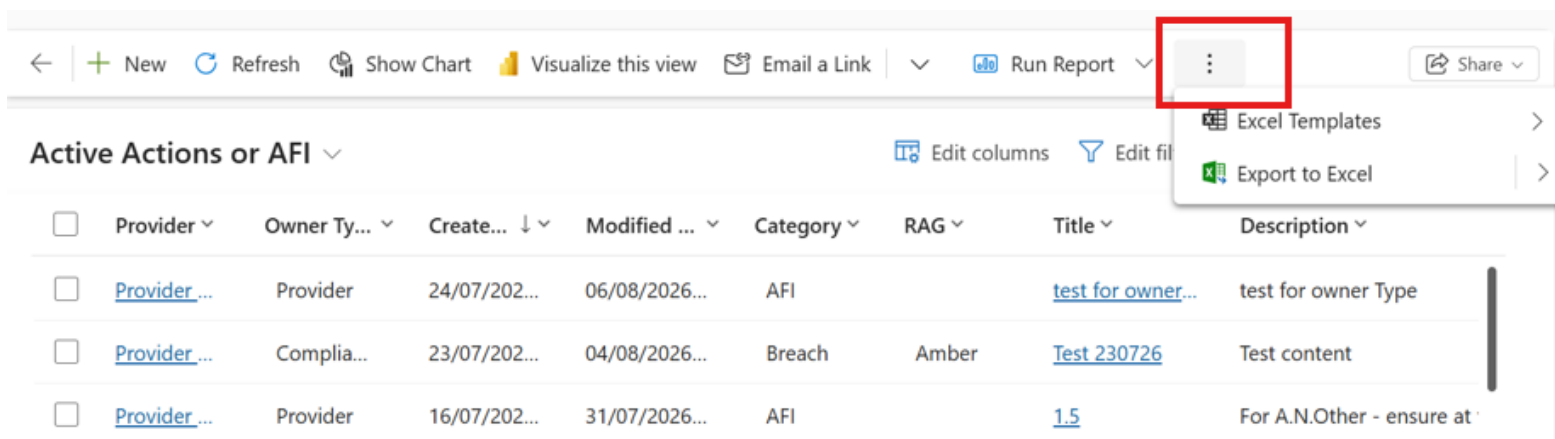


Exporting to Excel

1. To select the Actions or AFIs you wish to export - use the tick boxes on the left-hand side and then click export to excel:



Note: if the excel option is not available click the 3 ellipses, and then the export to excel:



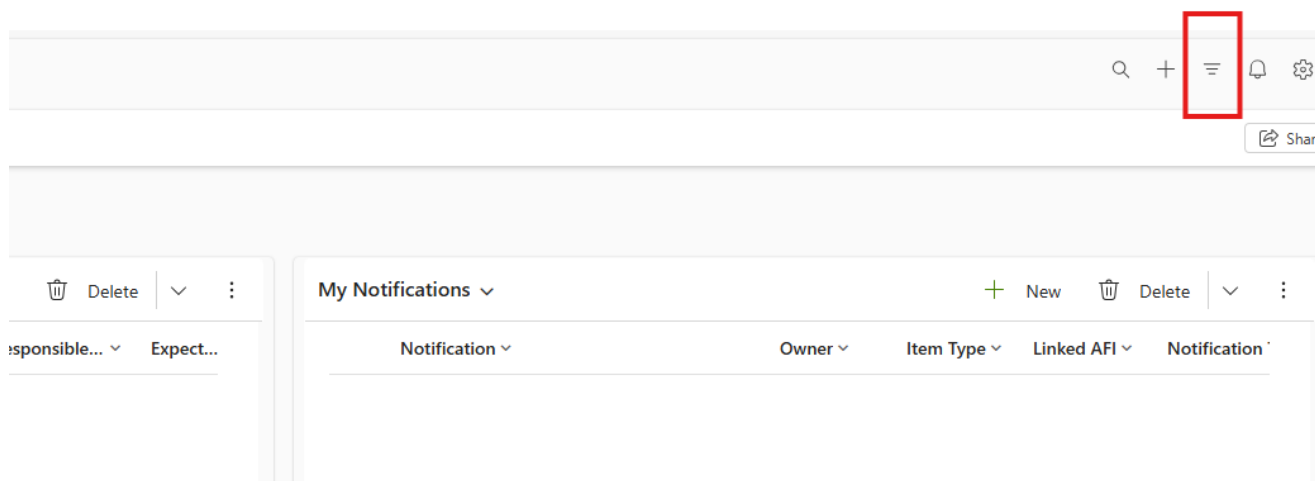
Active Actions or AFI

☐	Provider	Owner Ty...	Create... ↓	Modified ...	Category	RAG	Title	Description
☐	Provider...	Provider	24/07/202...	06/08/2026...	AFI		test for owner...	test for owner Type
☐	Provider...	Complia...	23/07/202...	04/08/2026...	Breach	Amber	Test 230726	Test content
☐	Provider...	Provider	16/07/202...	31/07/2026...	AFI		1.5	For A.N.Other - ensure at

2. This will create a pop out at the right-hand side of the screen which you will be able to download.

Advanced Finds

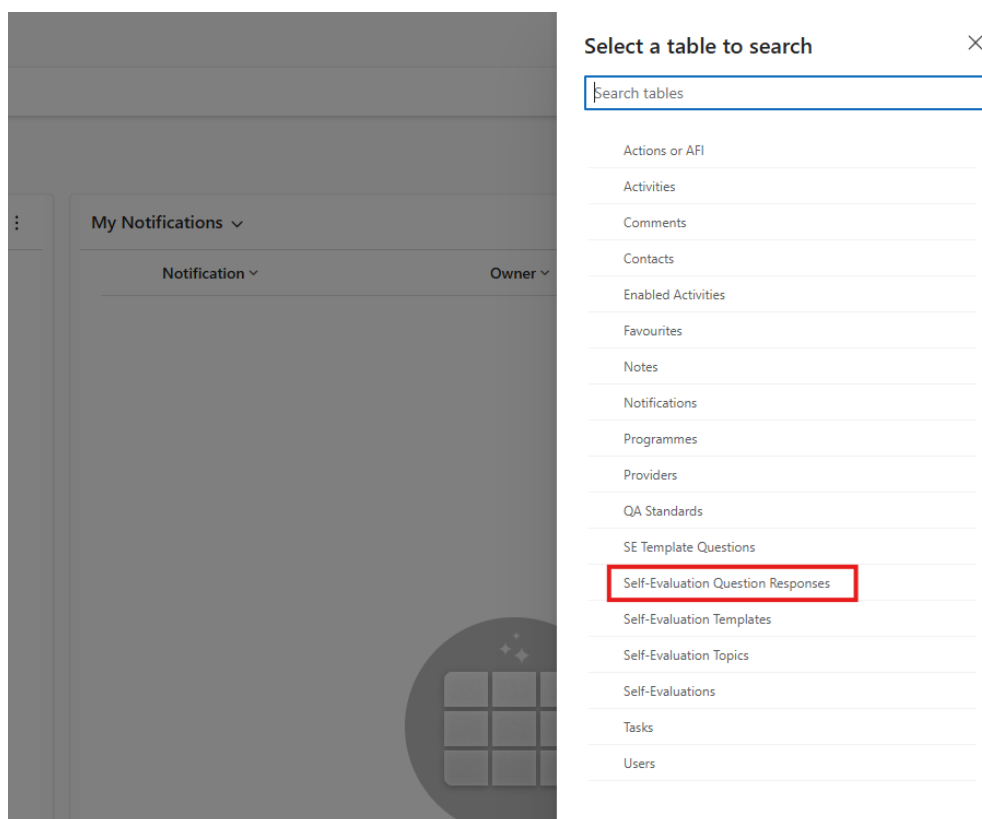
1. To export your Self Evaluation Responses to excel you are required to use the advanced find function:



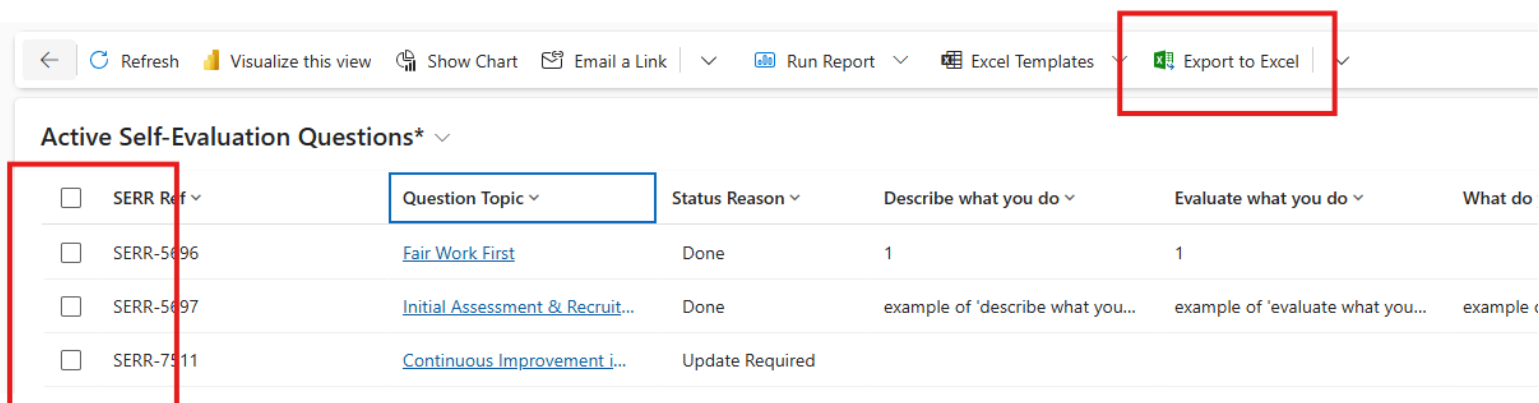
My Notifications

Notification	Owner	Item Type	Linked AFI	Notification
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2. Select Self-Evaluation Question Responses and click continue:



3. You will then be able to select the responses you wish to export using the tick boxes on the left-hand side and then click export to excel:



4. This will create a pop out at the right-hand side of the screen which you will be able to download.