



P16-0371 Panorama Project

Panorama Investigation Management User Manual

PNS IOM 105 Communication Log & Document Management

Version 1.0

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1 COMMUNICATIONS LOG

Panorama’s Communication Log functionality will be used for standard intake calls (e.g. someone called about where to get a flu shot, is concerned over news item related to outbreak etc.). How this functionality will be used will be based on operational needs and the desire to collect statistics on the types of calls received.

The Communication Log is a permanent record of communications received and information provided at a point in time.

Note: Personal Health Information is **not** to be recorded through a Communication Event. Clinical notes should be used to document client specific information.

Note: Communication Log **should never** be used with an investigation in context.

To view the Communications Log

1. Go to the Left Hand Navigation Bar.
2. Select **Communications Log**.



The **Communication Log** screen is displayed. From this screen a user can search for existing communication log entries or create a new entry.

Communication Log



Communication Log

Show Event Log for the following Date/Time range: Leave Date Fields empty for viewing all events.

From:	Date <input type="text" value="2018"/> / <input type="text" value="08"/> / <input type="text" value="14"/> <small>yyyy mm dd</small>	Time <input type="text" value="00"/> : <input type="text" value="00"/> :ADT	To:	Date <input type="text" value="2018"/> / <input type="text" value="08"/> / <input type="text" value="14"/> <small>yyyy mm dd</small>	Time <input type="text" value="23"/> : <input type="text" value="59"/> :ADT
	Direction: <input type="text"/>	Type: <input type="text"/>		Topic: <input type="text"/>	
	Logged By: <input type="text"/>	Last Name: <input type="text"/>		First Name: <input type="text"/>	

Jurisdictional Organization Exact Match

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority]
Find

Search
Retrieve
Clear

0 events found.

Expand All
Collapse All
Create

Event Date/Time	Direction	Logged By	Client Information	Comm Type	Topic	Title	Documents
Total: 0							

Page 1 of 1
Jump to page:

1.1 Search for a Communication Event

1. Enter criteria for the search.
2. Use the EFC to select a Jurisdictional Organization if desired. This field defaults to the user's organization.
3. Click **Search** button.

Communication Log



Communication Log

Show Event Log for the following Date/Time range: Leave Date Fields empty for viewing all events.

From: Date: 2018 / 08 / 14 Time: 00 : 00 :ADT **To:** Date: 2018 / 08 / 14 Time: 23 : 59 :ADT
yyyy mm dd hh mm

Direction: **Type:** Phone Call **Topic:**

Logged By: **Last Name:** **First Name:**

Jurisdictional Organization Exact Match
To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority]

0 events found.

Event Date/Time	Direction	Logged By	Client Information	Comm Type	Topic	Title	Documents
Total: 0							

Page 1 of 1

Jump to page:

The system displays the results that match the selected criteria.

Note: A message will be displayed if too many or no matching events are found. Modify the search criteria and complete the search again.

 **Tip:** Click **Retrieve** button to populate search with the criteria selected the last time a search was performed during the current Panorama session.

 **Tip:** Click **Clear** button to clear search criteria and return any default values.

Communication Log



Communication Log

Show Event Log for the following Date/Time range: Leave Date Fields empty for viewing all events.

From: Date: 2018/08/14 Time: 00:00:ADT To: Date: 2018/08/14 Time: 23:59:ADT

Direction: [Dropdown] Type: Phone Call [Dropdown] Topic: [Dropdown]

Logged By: [Dropdown] Last Name: [Text] First Name: [Text]

Jurisdictional Organization Exact Match

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority] [Find](#)

[Search](#) [Retrieve](#) [Clear](#)

2 events found. To view an event, click on the Event Date/Time.

[Expand All](#) [Collapse All](#) [Create](#)

Event Date/Time	Direction	Logged By	Client Information	Comm Type	Topic	Title	Documents
2018 Aug 14 10:42 ADT	Outbound	MacKirdy, Susan	Grape, Green	Phone Call	Appointments	Appointment Reminder	
2018 Aug 14 10:29 ADT	Inbound	MacKirdy, Susan	Sam	Phone Call	Enteric Symptoms	General question regarding stomach	

Total: 2 Page 1 of 1 Jump to page: [Input]

Click **Plus** icon next to an event to view the comments associated with the event.

To see all comments, click **Expand All** button.

To hide all comments, click **Collapse All** button

[Expand All](#) [Collapse All](#) [Create](#)

Event Date/Time	Direction	Logged By	Client Information	Comm Type	Topic	Title	Documents
2018 Aug 14 10:42 ADT	Outbound	MacKirdy, Susan	Grape, Green	Phone Call	Appointments	Appointment Reminder	
Date/Time		Comments				Recorded By	
2018 Aug 14 10:43 ADT		Called to remind of scheduled counseling session. Message left on voice mail				MacKirdy, Susan	
2018 Aug 14 10:29 ADT	Inbound	MacKirdy, Susan	Sam	Phone Call	Enteric Symptoms	General question regarding stomach	
Date/Time		Comments				Recorded By	
2018 Aug 14 10:33 ADT		Member of the public called concerned regarding stomach ailments experienced soon after eating at a local restaurant. After discussion, it was determined the issues were likely related to the new medication prescribed by the physician. Advised caller to follow-up with physician.				MacKirdy, Susan	

Total: 2 Page 1 of 1 Jump to page: [Input]

1.2 Create a Communication Event

A Communication Event may be created with a Client in context or without.

Note: Personal Health Information is **not** to be recorded through a Communication Event. Clinical notes should be used to document client specific information.



Tip: Communication Events created **with** a Client in context can be viewed both in the Communication Log and in the Communications Log section below the Clinical Notes screen.

Remove a Client from context

1. Click Remove Client from Context hyperlink located in the Context Header section.

Communication Log ? 📄

ACTIVE			
Client ID: 204	Name(Last, First Middle)/Gender: Grape, Green / Male	Health Card No: -	Date of Birth / Age: 1988 Jul 01 / 30 years
Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	
			Remove Client From Context

The Client will be removed from context and the Communications Log screen displayed.

Create a Communications Event

1. Click **Create** button.

Communication Log



Communication Log

Show Event Log for the following Date/Time range: Leave Date Fields empty for viewing all events.

From: Date: <input type="text" value="2018"/> / <input type="text" value="08"/> / <input type="text" value="15"/> <input type="button" value="📅"/> <small>yyyy mm dd</small> Time: <input type="text" value="00"/> : <input type="text" value="00"/> :ADT <small>hh mm</small> Direction: <input type="text" value="▼"/> Type: <input type="text" value="▼"/> Logged By: <input type="text" value="▼"/> Last Name: <input type="text"/> First Name: <input type="text"/>	To: Date: <input type="text" value="2018"/> / <input type="text" value="08"/> / <input type="text" value="15"/> <input type="button" value="📅"/> <small>yyyy mm dd</small> Time: <input type="text" value="23"/> : <input type="text" value="59"/> :ADT <small>hh mm</small> Topic: <input type="text" value="▼"/>	
--	--	--

Jurisdictional Organization Exact Match

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority]
Find

5 events found. To view an event, click on the Event Date/Time.

Create

The **Create Communication Event** screen is displayed.

Date and Time fields default to the current date/time.

Organization defaults to the user's organization.

2. Select **Direction** (refers to the direction of the communication).
3. Update **Organization** if necessary using the EFC.
4. Complete **Client Search** if a client is to be put into context; or
5. Complete **Client Information** section

Note: First Name is the only Panorama mandatory field in the Client Information section. Users could indicate a dummy value, or "Anonymous" or add "Physician – GO", "Pharmacist – NP".

Event Details					↑ Hide Event Details
* Event Date:	* Event Time:	* Direction:	Logged By:	Date / Time Created:	
2018 / 08 / 15 yyyy mm dd	10 : 38 : ADT hh mm	Outbound ▼	MacKirdy, Susan	Wed Aug 15 2018 10:38:12 ADT	

* Jurisdictional Organization:

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority] Find 🔍

Client Information:					↑ Hide Person Details
Last Name:	* First Name:				Client Search
<input type="text"/>	Olivia x				
Date of Birth:	Gender:				
<input type="text"/> / <input type="text"/> / <input type="text"/> yyyy mm dd	<input type="text"/>				
Phone Number:	Fax Number:	Email Address:			
(<input type="text"/>) <input type="text"/> - <input type="text"/>	(<input type="text"/>) <input type="text"/> - <input type="text"/>	<input type="text"/>			
Address:					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Unit No.	Street No.	Street Name	Street Type	Street Direction	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
P.O. Box*	STN / RPO	Rural Route	Postal Code		
City:	Province/Territory:	Country:			
<input type="text"/>	-- Select -- ▼	Canada ▼			

6. Select **Communication Type**, **Topic** and **Outcome(s)**
7. Enter **Title**
8. Enter **Comments** and click **Add** button.
9. Click **Save** button.

Communication Details ^ Hide Communications Details

* **Communication Type:** Phone Call * **Topic:** Appointments **Outcome(s):**

- Assigned Task for Follow Up
- Client Appointment**
- Follow Up Required
- No Follow Up Required

Title (Description of communication):
Appointment Reminder

Comments:
Called to remind client of counseling appointment. Left message on voice mail.

(3922 characters) **Add**

Date/Time	Comments	Recorded By
		<input type="button" value="Save"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/>

The system creates the communication event and displays the **Communication Event Details** screen.

Communication Event Details ?

Communication Event Details

Communication Event was successfully created.

Event Details ^ Hide Event Details

Event Date: 2018 Aug 15	Event Time: 10:38:00 ADT	Direction: Outbound	Logged By: MacKirdy, Susan	Date / Time Created: 2018 Aug 15 10:58:12 ADT
-----------------------------------	------------------------------------	-------------------------------	--------------------------------------	---

Jurisdictional Organization:
To specify an Organization, first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority]

Client Information ^ Hide Person Details

Last Name:	First Name: Olivia
Phone Number:	Email Address:

Communication Details ^ Hide Communications Details

Communication Type: Phone Call	Topic: Appointments	Outcome(s): Client Appointment
Title (Description of communication): Appointment Reminder	Assigned To:	
Comments:		



Tip: Unsaved changes can be cancelled and the user returned to the previous screen by clicking the **Cancel** button.

1.3 View/update a Communication Event

1. Click the communication **Event Date/Time** hyperlink.

The **Communication Event Details** screen is displayed.

The Communication Event Details screen allows a user to update details about an existing event. Because this is a permanent record, the user will only be able to add comments, attach documents, assign a task, or delete the Communication Event.

Communication Event Details



ACTIVE			
Client ID: 204	Name(Last, First Middle)/Gender: Grape, Green / Male	Health Card No: -	Date of Birth / Age: 1988 Jul 01 / 30 years
Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Communication Event Details

Event Details ⤴ Hide Event Details

Event Date: 2018 Aug 14	Event Time: 10:42:00 ADT	Direction: Outbound	Logged By: MacKirdy, Susan	Date / Time Created: 2018 Aug 14 10:43:44 ADT
-----------------------------------	------------------------------------	-------------------------------	--------------------------------------	---

Jurisdictional Organization:

To specify an Organization, first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority]

Client Information ⤴ Hide Person Details

Last Name: Grape	First Name: Green
Phone Number:	Email Address:

Communication Details ↑ Hide Communications Details

Communication Type: Phone Call **Topic:** Appointments **Outcome(s):**
Title (Description of communication): Appointment Reminder **Assigned To:** Central Zone

Comments:

(4000 characters) Add

Date/Time	Comments	Recorded By
2018 Aug 14 11:39:52 ADT	Client missed scheduled appointment	MacKirdy, Susan
2018 Aug 14 10:43:28 ADT	Called to remind of scheduled counseling session. Message left on voice mail	MacKirdy, Susan

3. Click **Save** button

Communication Details ↑ Hide Communications Details

Communication Type: Phone Call **Topic:** Appointments **Outcome(s):**
Title (Description of communication): Appointment Reminder **Assigned To:** Central Zone

Comments:

(4000 characters) Add

Date/Time	Comments	Recorded By
2018 Aug 14 11:39:52 ADT	Client missed scheduled appointment	MacKirdy, Susan
2018 Aug 14 10:43:28 ADT	Called to remind of scheduled counseling session. Message left on voice mail	MacKirdy, Susan

Documents ↑ Hide Documents

Documents Attached Manage Documents

Document Title	Created Date

Central Zone ▼ Assign Task Save ▼ Delete Cancel

The system responds with a message that the event was successfully updated.



Tip: Unsaved changes can be cancelled and the user returned to the previous screen by clicking the **Cancel** button.

Communication Event Details



ACTIVE			
Client ID: 204	Name(Last, First Middle)/Gender: Grape, Green / Male	Health Card No: -	Date of Birth / Age: 1988 Jul 01 / 30 years
Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Communication Event Details

Communication Event was successfully updated.

Attach a Document

1. Click **Manage Documents** button.

Documents Hide Documents

Documents Attached Manage Documents

Document Title	Created Date

Central Zone
Assign Task
Save

Delete
Cancel

The Context Document screen is displayed.

2. Search for an existing document by entering a **Keyword** and clicking the **Search** button; or
3. Click **Add New** button to add a new document.

Context Documents



ACTIVE

Client ID: 204	Name(Last, First Middle)/Gender: Grape, Green / Male	Health Card No: -	Date of Birth / Age: 1988 Jul 01 / 30 years
Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Search Document Folders - Basic
⤴ Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

Search Documents by keyword:

Document List
⤴ Hide Document List

Row Actions:

Document Title	Size[KB]	Type	Posted By	Posted On	Description	Status
Total: 0						

Page 1 of 1
Jump to page:

The **Document Management** Screen is displayed.

4. Browse for the applicable document.
5. Click **Upload File** button.
6. Enter **Document Title**.

Document Management



Add New Document

X Upload file before submitting changes

* File name:

File uploaded.

Selected Document:

* Document Title:

* Effective Date: / /

Expiration Date: / /

Status: *

Enter Keyword: Selected Keywords:

Use CTRL key for multiple selections.

Description:

Document Added by : MacKirdy, Susan on : 2018 Aug 14

7. Click **Submit** button.

Document Management



Add New Document

* File name:

File uploaded: **Test File.docx**

Selected Document:

* Document Title:

* Effective Date: / /
yyyy mm dd

Expiration Date: / /
yyyy mm dd

Status: *

Enter Keyword:

Selected Keywords:

Use CTRL key for multiple selections.

Description:

Document Added by : MacKirdy, Susan on : 2018 Aug 14

The document is added to the Document List.

8. Select the document.
9. Click **Select and Return** button.

Document List ↑ Hide Document List							
Row Actions:					<input type="button" value="Add New"/>		
Document Title	Size [KB]	Type	Posted By	Posted On	Description	Status	
<input checked="" type="checkbox"/>	Test Document	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 14		active

Total: 1 Page 1 of 1 Jump to page:

The document is added to the Communication Event.

User Documents

Document Folders - Tree View ? 📄

MacKirdy, Susan

Create New Folder Delete

Search Document Folders - Basic Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

Selected Folder: MacKirdy, Susan Include History

Search Documents by keyword:

Search Retrieve Clear [Advanced Search](#)

Document List Hide Document List

Row Actions:

Delete Move Select and Return
Add New

Document Title	Version	Size [KB]	Type	Posted By	Posted On	Description	Locked (Yes/No)	Status
<input checked="" type="checkbox"/> Test File	1	11.61	VND_OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 13		No	active

Assigning a Task

1. Select the workgroup from the drop down at the **top** or **bottom** of the screen and click the **Assign Task** button.

Communication Event Details

ACTIVE

Client ID: 204	Name(Last, First Middle)/Gender: Grape, Green / Male	Health Card No: -	Date of Birth / Age: 1988 Jul 01 / 30 years
Phone Number: (-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Communication Event Details

Central Zone ▼

Assign Task

Save ▼ Delete Cancel

The system creates a task using the Communication Event Title for the Task Description. The task is assigned to the selected workgroup as "Pending" and is linked directly to this communication event.

1.4 Delete a Communication Event

1. Select/open the Communication Event to be deleted by clicking the **Event Date/Time** hyperlink.

	Event Date/Time	Direction	Logged By	Client Information	Comm Type	Topic	Title	Documents
⊕	2018 Aug 14 13:17 ADT	Inbound	McClarty, Erin	ekmtest, client 2	Phone Call	Enteric Symptoms	Sam has a bad tummy	
⊕	2018 Aug 14 13:15 ADT	Inbound	McClarty, Erin	Sam	Phone Call	Enteric Symptoms	Enteric Symtoms - maybe something	
⊕	2018 Aug 14 12:58 ADT	Inbound	McClarty, Erin	ekmtest, test	Phone Call	Appointments	Looking for this	
⊕	2018 Aug 14 10:42 ADT	Outbound	MacKirdy, Susan	Grape, Green	Phone Call	Appointments	Appointment Reminder	Test Document
⊕	2018 Aug 14 10:29 ADT	Inbound	MacKirdy, Susan	Sam	Phone Call	Enteric Symptoms	General question regarding stomach	

Total: 5 Page 1 of 1 Jump to page:

2. Select the **Reason for Deletion** from the drop down.
3. Click the **Delete** button.

Documents
⤴ Hide Documents

Documents Attached
Manage Documents

Document Title	Created Date

Central Zone
Assign Task
Save

Reason for Deletion

Delete
Cancel

The system prompts the user to confirm.

The communication event is deleted and the **Communication Log** screen is displayed.

2 USER DOCUMENTS

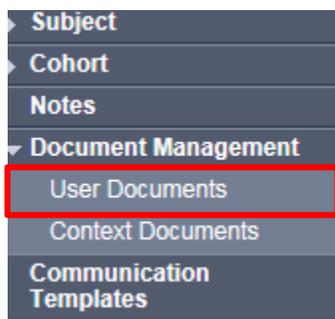
The User Documents screen supports the management of documents not directly associated to system records (i.e. context documents). The screen displays a user's personal folder and a user can add, view or delete documents in their personal folder, any folders created by the user, and some workgroup folders.

Files located in the user's folder are displayed in the document list at the bottom of the screen.

2.1 User Documents Screen

To access the User Documents screen

1. Go to the Left-Hand Navigation menu.
2. Under the Document Management section, select **User Documents**.



The **User Documents** screen is displayed..

User Documents



Document Folders - Tree View

Hide Document Folders - Tree View



MacKirdy, Susan

Create New Folder Delete

Search Document Folders - Basic

Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

Selected Folder: MacKirdy, Susan Include History

Search Documents by keyword:

Search Retrieve Clear [Advanced Search](#)

Document List

Hide Document List

Row Actions:		Delete		Move							Add New	
Document Title	Version	Size [KB]	Type	Posted By	Posted On	Description	Locked (Yes/No)	Status				
<input type="checkbox"/>	Test File	1	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 13		No	active			

Total: 1 Page 1 of 1 Jump to page:

2.2 Documents Folder - Tree View

2.2.1 Create New Folder

1. Select the Folder under which the new folder will be created.
The system **bolds** the folder name.
2. Click **Create New Folder** button.

User Documents



Document Folders - Tree View

Hide Document Folders - Tree View



3. The **Create New Folder** modal is displayed.
4. Enter **New Folder Name**
5. Click **Create** button.

Document Management



Create New Folder

Folder

* Enter New Folder name:

New folder will be created in selected folder

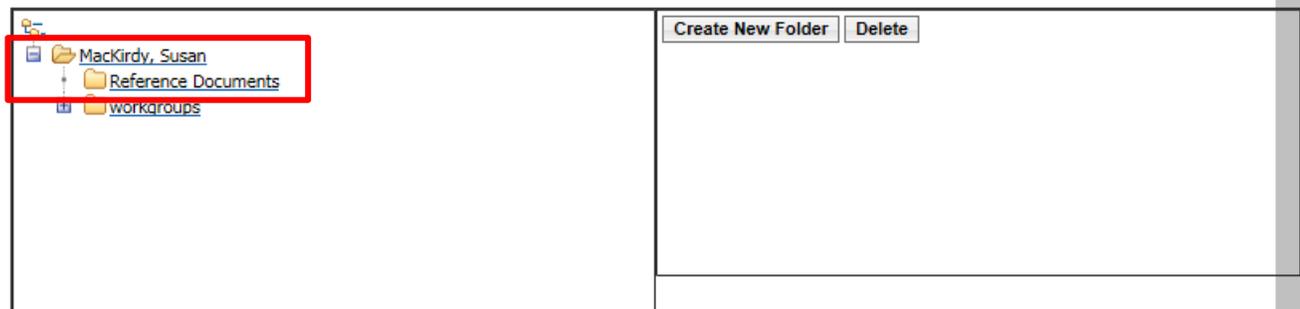
The system creates the new folder.

User Documents



Document Folders - Tree View

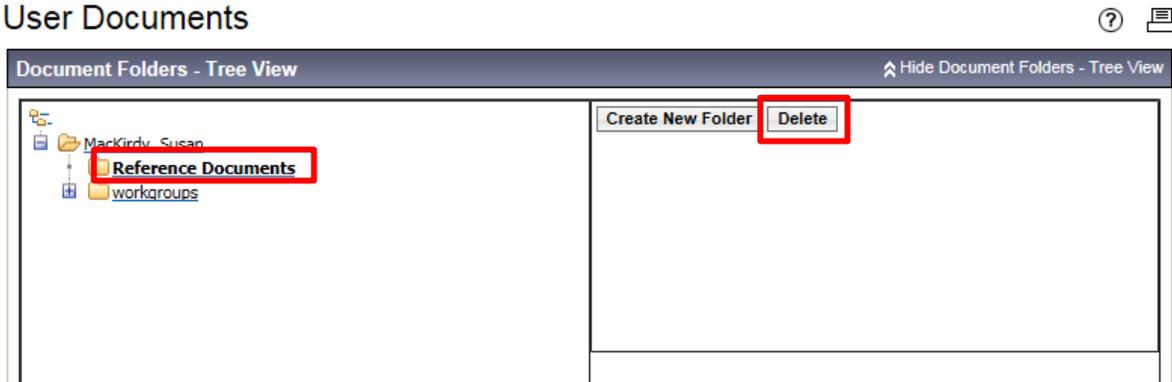
Hide Document Folders - Tree View



2.2.2 Delete Folder

1. Select the Folder to be deleted.
The system **bolds** the folder name.
2. Click **Delete** button.

User Documents



The system deletes the selected folder.

2.3 Search User Documents

1. In the **Document Folders - Tree View** section, click the **+ icon** beside each folder to expand the folder structure.
2. Select a folder.

The Selected Folder field name is shown in the Search Documents Folders - Basic section. All documents within the selected folder are displayed in the Document List section.

User Documents



Document Folders - Tree View ^ Hide Document Folders - Tree View

- MacKirdy, Susan
- workgroups

Create New Folder Delete

Search Document Folders - Basic ^ Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

Selected Folder: MacKirdy, Susan Include History

Search Documents by keyword:

Search Retrieve Clear [Advanced Search](#)

Document List ^ Hide Document List

Row Actions: Delete Move
Add New

Document Title	Version	Size [KB]	Type	Posted By	Posted On	Description	Locked (Yes/No)	Status
<input type="checkbox"/> Test File	1	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 13		No	active

Total: 1 Page 1 of 1 Jump to page:

3. To narrow the search, enter keyword(s) in the **Search Documents by Keyword** field.



Tip: Using the **Search Document by Keyword** field is dependent on keywords being identified by the user when adding a new document.

4. Click **Search** button.

Documents matching the keyword search are shown in the Document List section.



Tip: Enter single words separated by a space. For example, 'dog cat' will retrieve all documents that contain the word 'dog' or 'cat'.

5. Optionally check the **Include History** checkbox to include previous versions of the document in the search.



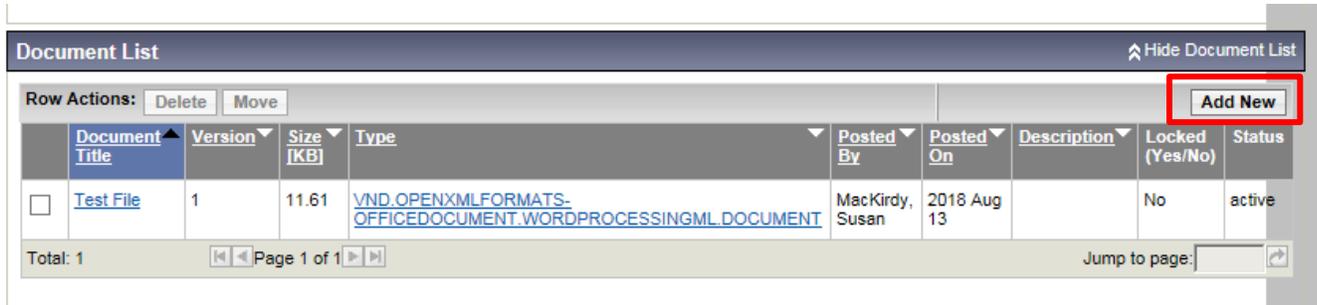
Tip: To retrieve search criteria, click **Retrieve** button. The screen is updated with the search criteria last entered/selected the last time the user performed a search for the current Panorama session.

 **Tip:** To clear search criteria, click **Clear** button.

2.4 Add User Document

To add a new user document

1. Click **Add New** button



The screenshot shows a 'Document List' interface. At the top right, there is a 'Hide Document List' link. Below the header, there are 'Row Actions' buttons for 'Delete' and 'Move'. A red box highlights the 'Add New' button. The main table has the following columns: Document Title, Version, Size [KB], Type, Posted By, Posted On, Description, Locked (Yes/No), and Status. A single row is visible with the following data: Document Title: Test File, Version: 1, Size: 11.61, Type: VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT, Posted By: MacKirdy, Susan, Posted On: 2018 Aug 13, Description: (empty), Locked: No, Status: active. At the bottom, there is a 'Total: 1' indicator, a 'Page 1 of 1' navigation bar, and a 'Jump to page:' field.

The Document Management screen is displayed.

2. Click **Browse** button to search for the applicable document.
3. Click **Upload File** button.
4. Enter **Document Title**.
5. Update **Effective Date** if required. Default is current date.
6. Add **Expiration Date** if required.
7. Change **Status** if necessary. Default is "active".
8. If desired, enter **Keyword(s)** to assist with searches. Click **Add** button.
9. Add **Description**
10. Enter **Comments** if desired.
11. Click **Submit** button.

Document Management



Add New Document

Add New Document to Folder: MacKirdy, Susan Use tree view above to select a different folder.

* File name: Browse... Upload File

File uploaded: Test Document 2.docx

Selected Document:

* Document Title:

* Effective Date: / / ...

Expiration Date: / / ...

Status: * active

Lock Document

Use CTRL key for multiple selections.

Enter Keyword: Add Remove

Selected Keywords:

Description:

Document Added by: MacKirdy, Susan on: 2018 Aug 17

Comments: ^ Hide Comments

Comments:

Submit

The document is added to the **Document List**.

2.4.1 Open User Document

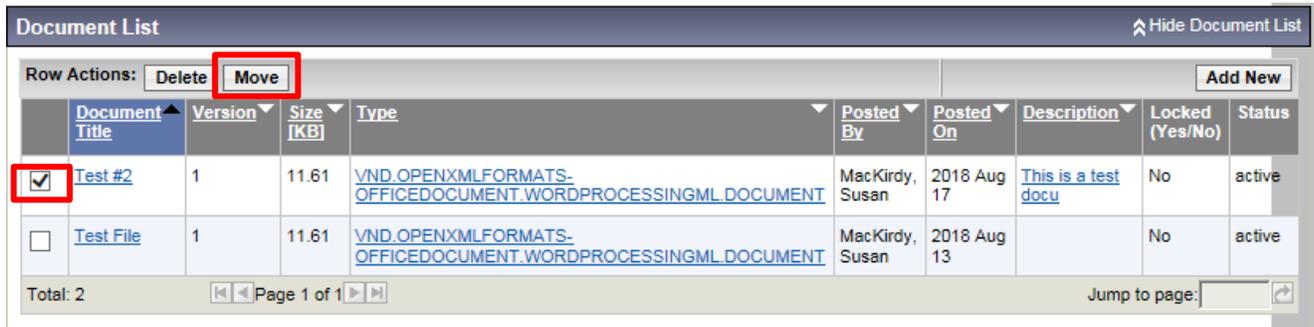
1. Click **Document Title** hyperlink.

Document List ^ Hide Document List									
Row Actions:						<input type="button" value="Add New"/>			
<input type="checkbox"/>	Document Title	Version	Size [Kb]	Type	Posted By	Posted On	Description	Locked (Yes/No)	Status
<input type="checkbox"/>	Test #2	1	11.61	VND_OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 17	This is a test docu	No	active
<input type="checkbox"/>	Test File	1	11.61	VND_OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 13		No	active

Total: 2 Page 1 of 1 Jump to page:

2.4.2 Move User Document

1. Select document from **Document List**.
2. Click **Move** button.



Document List Hide Document List

Row Actions: Delete **Move** Add New

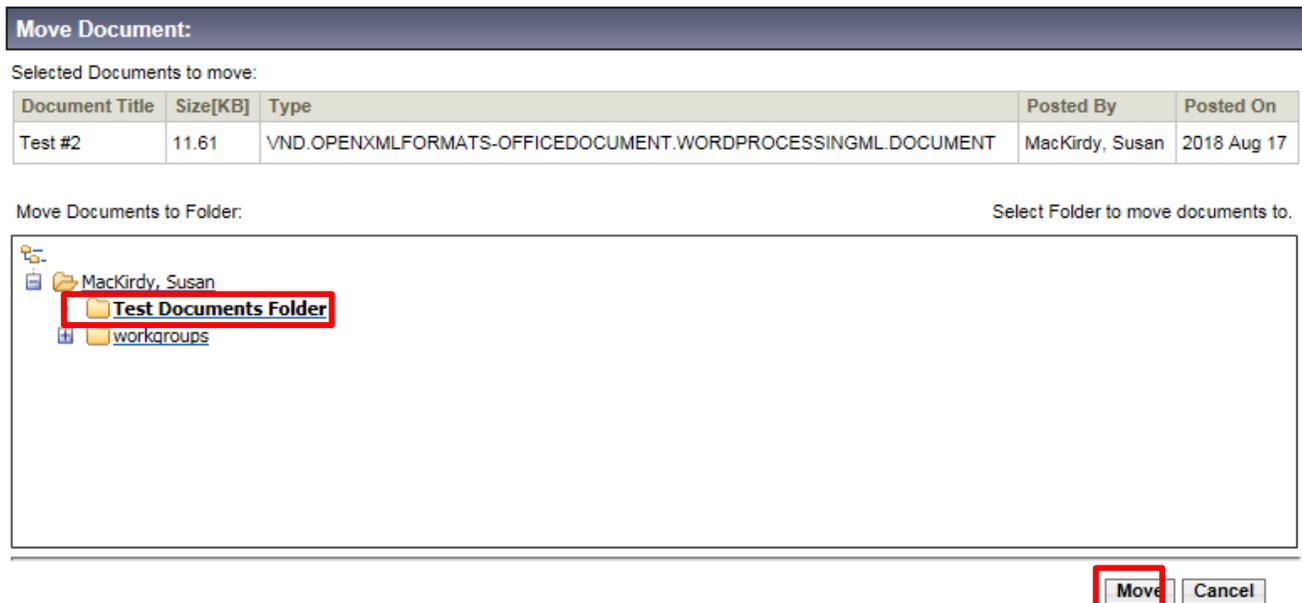
	Document Title	Version	Size [KB]	Type	Posted By	Posted On	Description	Locked (Yes/No)	Status
<input checked="" type="checkbox"/>	Test #2	1	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 17	This is a test docu	No	active
<input type="checkbox"/>	Test File	1	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 13		No	active

Total: 2 Page 1 of 1 Jump to page:

The Move Document modal is displayed,

3. Click **Folder** name to which the document will be moved.
4. Click **Move** button.

Document Management



Move Document:

Selected Documents to move:

Document Title	Size[KB]	Type	Posted By	Posted On
Test #2	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 17

Move Documents to Folder: Select Folder to move documents to.

- MacKirdy, Susan
 - Test Documents Folder**
 - workgroups

Move Cancel

The system will prompt the user to confirm.

5. Click **OK** to continue.

2.5 Delete User Document

1. Select folder in **Documents Folder – Tree View**.

Documents will be displayed in the **Document List**.

2. Select document to be deleted.
3. Click **Delete** button.

Document Folders - Tree View ⤴ Hide Document Folders - Tree View



Create New Folder Delete

Search Document Folders - Basic ⤴ Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

Selected Folder: MacKirdy, Susan Include History

Search Documents by keyword:

Search Retrieve Clear [Advanced Search](#)

Document List ⤴ Hide Document List

Row Actions: Delete Move Add New

	Document Title	Version	Size [KB]	Type	Posted By	Posted On	Description	Locked (Yes/No)	Status
<input checked="" type="checkbox"/>	Test #2	1	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 17	This is a test docu	No	active
<input type="checkbox"/>	Test File	1	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 13		No	active

The system will prompt the user to confirm.

4. Click **OK** to continue.

3 CONTEXT DOCUMENTS

The Context Documents screen allows a user to store and view documents that have been attached to system records. Documents can be attached directly to system records such as client, non-human subject, investigations, cohorts, mass immunization events, outbreaks, etc.

When a user navigates from the side navigation menu to the Context Documents screen, documents attached to the record in context are displayed.

Note: Documents associated to an investigation **should always** be added with the investigation in context. This will restrict access to the document to those users with the appropriate permissions.

3.1 Context Documents Screen

To access the Context Documents screen

1. Go to the Left-Hand Navigation menu.
2. Under the Document Management section, select **Context Documents**.



The **Context Documents** screen is displayed.

Context Documents



A Client or Subject is currently not selected. Please conduct the appropriate search:

- [Client Search](#)
- [Non Human Subject Search](#)
- [Investigation Search](#)
- [Cohort Search](#)
- [Outbreak Search](#)

Search Document Folders - Basic
⤴ Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

Search Documents by keyword:

Document List
⤴ Hide Document List

Row Actions:

Document Title	Size[KB]	Type	Posted By	Posted On	Description	Status

Total: 0
⏪ Page 1 of 1 ⏩
Jump to page:

3.2 Search Context Documents

1. Complete a **Client or Subject Search**. If the document was added with an investigation in context, the investigation must be in context to search for the document.

The Context Documents screen is displayed.

In this example, the client and investigation are in context and the documents attached to this investigation record are displayed in the Document List.

Context Documents



Client ID: 204	Name(Last, First Middle)/Gender: Grape, Green / Male	Health Card No: -	Date of Birth / Age: 1988 Jul 01 / 30 years
Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	
Investigation ID: 151	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Mumps	PHAC Date/Type: 2018 Jun 25 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Investigation / 2018 Jul 16

Search Document Folders - Basic Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

Search Documents by keyword:

Document List Hide Document List

Row Actions:

	Document Title	Size [KB]	Type	Posted By	Posted On	Description	Status
<input type="checkbox"/>	Test File 2	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 20		active

3.3 Add Context Document

With the client and/or investigation in context

1. Click **Add New** button

Document List Hide Document List

Row Actions:

	Document Title	Size [KB]	Type	Posted By	Posted On	Description	Status
<input type="checkbox"/>	Test File 2	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 20		active

Total: 1 Page 1 of 1 Jump to page:

The Document Management screen is displayed.

2. Click **Browse** button to search for the applicable document.
3. Click **Upload File** button.
4. Enter **Document Title**.
5. Update **Effective Date** if required. Default is current date.
6. Add **Expiration Date** if required.
7. Change **Status** if necessary. Default is “active”.
8. If desired, enter **Keyword(s)** to assist with searches. Click **Add** button.
9. Add **Description** and enter **Comments** if required.
10. Click **Submit** button.

Document Management



Add New Document

Add New Document to Folder: MacKirdy, Susan Use tree view above to select a different folder.

* File name:

File uploaded: Test Document 2.docx

Selected Document:

* Document Title:

* Effective Date: / /

Expiration Date: / /

Status: * active

Lock Document

Use CTRL key for multiple selections.

Enter Keyword:

Selected Keywords:

Description:

Document Added by: MacKirdy, Susan on: 2018 Aug 17

Comments: ↑ Hide Comments

Comments:

The document is added to the **Document List**.

3.3.1 Open Context Document

11. Click **Document Title** hyperlink.

Document List Hide Document List						
Row Actions: <input type="button" value="Delete"/>				<input type="button" value="Add New"/>		
<input type="checkbox"/>	Document Title	Size [KB]	Type	Posted By	Posted On	Status
<input checked="" type="checkbox"/>	Test File 2	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML_DOCUMENT	MacKirdy, Susan	2018 Aug 20	active

Total: 1 Page 1 of 1 Jump to page:

3.4 Delete Context Document

With the client and investigation in context

1. Select document to be deleted.
2. Click **Delete** button.

ACTIVE

Client ID: [204](#)
Name(Last, First Middle)/Gender: Grape, Green / Male
Health Card No: -
Date of Birth / Age: 1988 Jul 01 / 30 years
Phone Number: -(-)
Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority
Additional ID Type / Additional ID: Provincial health service provider identifier / -

[Investigation](#)

Investigation ID: [151](#)
Status: OPEN
Disposition: Investigation in progress
Investigator: -
Disease: Mumps
PHAC Date/Type: 2018 Jun 25 / Most Recent Exposure
Etiologic Agent: -
Authority/Classification: National / Contact - Person Under Investigation / 2018 Jul 16

Search Document Folders - Basic

[Hide Search](#)

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

Search Documents by keyword:

Document List

[Hide Document List](#)

Row Actions:

	Document Title	Size [KB]	Type	Posted By	Posted On	Description	Status
<input checked="" type="checkbox"/>	Test File 2	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML_DOCUMENT	MacKirdy, Susan	2018 Aug 20		active

...tia.ca/DocumentManagement/pages/

Jump to page:

The system will prompt the user to confirm.

3. Click **OK** to continue.