



P16-0371 Panorama Project

Panorama Work Management User Manual

PNS WKM 101 Work Management

Version 1.0

Dated: 2018-10-18

© 2018 Nova Scotia Department of Health and Wellness

This document is a product of Nova Scotia Department of Health and Wellness. This document and its contents are protected by Canadian and international copyright laws. The contents of this document are confidential and proprietary and are provided to the recipient with the specific understanding that neither the document, nor the information, concepts, ideas, materials, and/or specifications presented herein will be used for any purpose other than the recipient's work with or for The Department of Health and Wellness. Any duplication, distribution, disclosure, or other use except as expressly authorized in writing by The Department of Health and Wellness is strictly prohibited.

The recipient acknowledges that presentation of this document conveys no rights to the intellectual property contained herein. The Department of Health and Wellness makes no warranties, either express or implied, in this document, and The Department of Health and Wellness assumes no liability for any errors, omissions, or inaccuracies included within this document. Information in this document is subject to change without notice.

TABLE OF CONTENTS

1 PERSONAL WORKLOAD SCREEN	3
1.1 View Tasks	3
1.2 Task Attributes	4
1.3 Task Attributes - Details	5
2 TASK LIFECYCLE AND WORKFLOW	6
2.1 Accept & Action a Task	6
2.2 Reassign a Task to Another User	8
2.3 Reject a Task	9
2.4 Create Manual Tasks	10
3 TEAM WORKLOAD SCREEN	14
3.1 Managing the Team Workload	14
3.2 Assign Tasks	16
3.3 Delete Tasks	19
3.4 Re-Open Tasks	19

1.2 Task Attributes

View: All Pending Open Completed

1 assigned tasks found To view a task, click on the Sub-task ID. To view the work, click on the Work Type link.

Select All Row Actions: Mark Completed Update Re-open Create Task

Accept Reject Delete

Sub-Task Status	Requested Start Date	Priority	Client	Sub-Task ID	Description	Work Type
<input type="checkbox"/> Pending	2018 Aug 6	Medium	Apple, Candy (201)	80	You have been assigned to be the Primary Investigator for Investigation 147.	INV

Total: 1 Page 1 of 1 Jump to page:

Sub-Task Status – This is the current state of the task and the default state when first assigned.

- Task states are Unassigned, Pending, Open, Completed, Reassigned, Removed, and Rejected.

Requested Start Date – This is the date the task was generated.

Priority – This is system assigned unless task is being manually created. Available priorities are: Low, Med, High, Urgent.

Client – This is a hyperlink to the client personal information screen when a task is linked to a clients' record.

Sub-Task ID – All tasks have a Primary Task ID and a Sub-Task ID. The Sub-Task ID is unique to the task in the context of whom the task is assigned to. The Primary Task ID should always remain the same.

Description – A description of the task.

Work Type – A code that reflects the type of task assigned, e.g. INV – Investigation, AE – Adverse Event, LAB – Lab Report etc.

1.3 Task Attributes - Details

View Task ? 🖨

Primary Task ID: 393	Primary Task Status: Pending
Sub-Task ID: 80	Sub-Task Status: Pending
Requested Start Date: 2018 Aug 6	Priority: Medium
Description: You have been assigned to be the Primary Investigator for Investigation 147.	
Work Type: INV	Work ID: 147
Client: Apple, Candy (201)	

Comments

Comment Date	Comments	Recorded By

Assignees

Workgroup	User	Sub-Task ID	Sub-Task Status
Central Zone	Patterson, Christine/NSHA	80	Pending

Primary Task Status / Sub-Task Status – When a task is reassigned from one user to another, a copy of the task is sent to the new assignee with the unique **Sub-Task ID** for that assignment. Each task – the original and the reassigned copy have their own status.

Work ID – This is an ID that is related to the **Work Type**. If **Work Type** is INV, the **Work ID** is the Investigation ID. If **Work Type** is Lab, the **Work ID** is the Lab Requisition ID.

Comments – When a task is generated or updated, a user may have the ability to add comments.

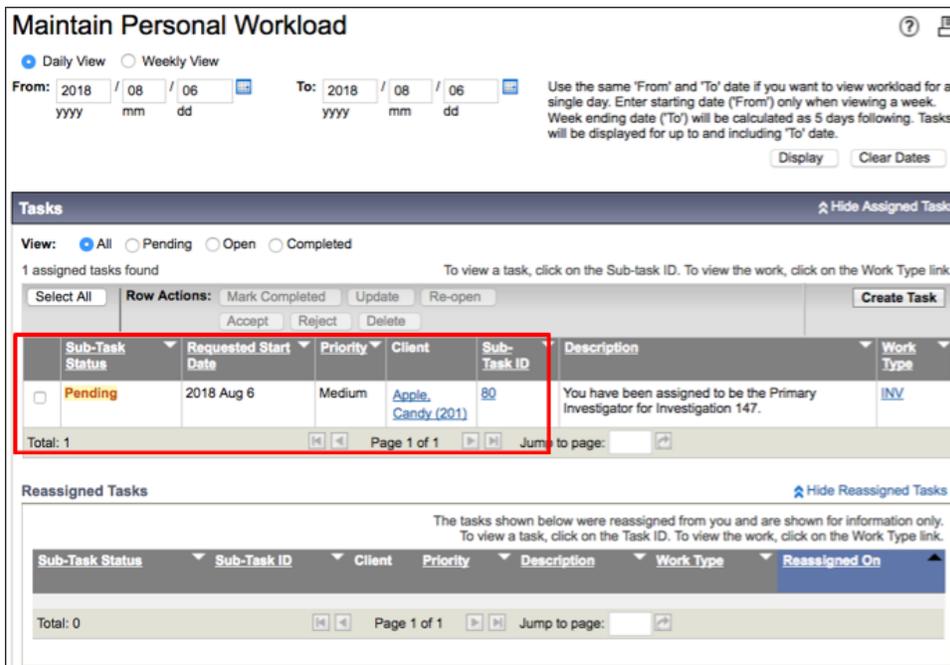
List of Assignees – When a task is reassigned or assigned to more than one user at a time, the list of assignees is shown in this table.

2 TASK LIFECYCLE AND WORKFLOW

2.1 Accept & Action a Task

A task is assigned to a user.

The user receives a Pending task on their **Personal Workload** screen



The screenshot shows the 'Maintain Personal Workload' interface. At the top, there are date selection fields for 'From' and 'To' (both set to 2018/08/06) and a 'Display' button. Below this is a 'Tasks' section with a 'View' dropdown set to 'All'. A single task is listed in a table, highlighted with a red box. The task has a 'Sub-Task Status' of 'Pending', a 'Requested Start Date' of '2018 Aug 6', a 'Priority' of 'Medium', a 'Client' of 'Apple, Candy (2011)', and a 'Sub-Task ID' of '80'. The description reads: 'You have been assigned to be the Primary Investigator for Investigation 147.' Below the task table is a 'Reassigned Tasks' section which is currently empty.

Sub-Task Status	Requested Start Date	Priority	Client	Sub-Task ID	Description	Work Type
<input type="checkbox"/> Pending	2018 Aug 6	Medium	Apple, Candy (2011)	80	You have been assigned to be the Primary Investigator for Investigation 147.	INV

The user **accepts** the task:

1. Select the **Pending** radio button.
2. Select a task in the **Tasks** table.
3. Click **Accept**. This updates the task status to **Open**.

The user **actions** the task.

4. The open state can be an indication that a user will action the task.

Tasks Hide Assigned Tasks

View: All Pending Open Completed

1 assigned tasks found To view a task, click on the Sub-task ID. To view the work, click on the Work Type link.

Select All **Row Actions:** Mark Completed Update Re-open Create Task

Accept Reject Delete

Sub-Task Status	Requested Start Date	Priority	Client	Sub-Task ID	Description	Work Type
<input type="checkbox"/> Open	2018 Aug 22	Medium	Tree Willow (270)	98	You have been assigned to be the Primary Investigator for Investigation 230.	INV

Total: 1 Page 1 of 1 Jump to page:

Tasks Hide Assigned Tasks

View: All Pending Open Completed

1 assigned tasks found To view a task, click on the Sub-task ID. To view the work, click on the Work Type link.

Select All **Row Actions:** Mark Completed Update Re-open Create Task

Accept Reject Delete

Sub-Task Status	Requested Start Date	Priority	Client	Sub-Task ID	Description	Work Type
<input type="checkbox"/> Pending	2018 Aug 22	Medium	Tree Willow (270)	98	You have been assigned to be the Primary Investigator for Investigation 230.	INV

Total: 1 Page 1 of 1 Jump to page:

Reassigned Tasks Hide Reassigned Tasks

The tasks shown below were reassigned from you and are shown for information only. To view a task, click on the Task ID. To view the work, click on the Work Type link.

Sub-Task Status	Sub-Task ID	Client	Priority	Description	Work Type	Reassigned On
-----------------	-------------	--------	----------	-------------	-----------	---------------

Total: 0 Page 1 of 1 Jump to page:

5. The User follows **Work Type** hyperlink to the associated record which generated the task.

Tasks Hide Assigned Tasks

View: All Pending Open Completed

1 assigned tasks found To view a task, click on the Sub-task ID. To view the work, click on the Work Type link.

Select All **Row Actions:** Mark Completed Update Re-open Create Task

Accept Reject Delete

Sub-Task Status	Requested Start Date	Priority	Client	Sub-Task ID	Description	Work Type
<input type="checkbox"/> Pending	2018 Aug 22	Medium	Tree Willow (270)	98	You have been assigned to be the Primary Investigator for Investigation 230.	INV

Total: 1 Page 1 of 1 Jump to page:

Reassigned Tasks Hide Reassigned Tasks

The tasks shown below were reassigned from you and are shown for information only. To view a task, click on the Task ID. To view the work, click on the Work Type link.

Sub-Task Status	Sub-Task ID	Client	Priority	Description	Work Type	Reassigned On
-----------------	-------------	--------	----------	-------------	-----------	---------------

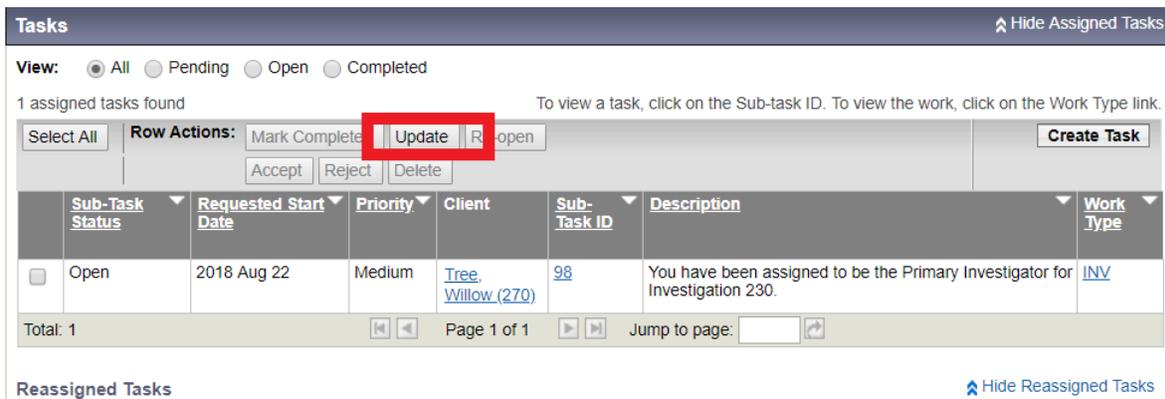
Total: 0 Page 1 of 1 Jump to page:

6. Once the task is completed, the user returns to the Personal Workload screen and marks task as **Completed**.

 **Tip:** Alternatively, completing a task can be done by clicking the **Sub-Task ID** hyperlink and clicking the **Mark Completed** button.

2.2 Reassign a Task to Another User

1. A task must be **Accepted** (state of **Open**) prior to being reassigned.
2. Select the open task from the **Tasks** table.
3. Click **Update**.



Tasks ↑ Hide Assigned Tasks

View: All Pending Open Completed

1 assigned tasks found To view a task, click on the Sub-task ID. To view the work, click on the Work Type link.

Select All **Row Actions:** Mark Complete **Update** Reopen Create Task

Accept Reject Delete

Sub-Task Status	Requested Start Date	Priority	Client	Sub-Task ID	Description	Work Type
<input type="checkbox"/> Open	2018 Aug 22	Medium	Tree, Willow (270)	98	You have been assigned to be the Primary Investigator for Investigation 230.	INV

Total: 1 Page 1 of 1 Jump to page:

Reassigned Tasks ↑ Hide Reassigned Tasks

4. Add **Comments** if applicable.



Update Task

Primary Task ID: 537 ? 

Sub-Task ID: 98 **Primary Task Status:** Open

Requested Start Date: 2018 Aug 22 **Sub-Task Status:** Open

Description: You have been assigned to be the Primary Investigator for Investigation 230. **Priority:** Medium

Work Type: INV **Work ID:** 230

Client: [Tree, Willow \(270\)](#)

Comments

Comment Date	Comments	Recorded By
--------------	----------	-------------

5. Select a user from the **Workgroup** drop-list.
6. Click **Submit**.

Comment Date	Comments	Recorded By

Assignees

Workgroup	User	Sub-Task ID	Sub-Task Status
Central Zone	Meddah, Sarah/Antigonish PHO	98	Open

Transfer To

Transferring Sub-Task ID: 98

Workgroup: Central Zone User:

- Christine Patterson/NSHA
- Erin McClarty/NSHA
- Latifa Mnyusiwalla/NSHA
- Sarah Meddah/Antigonish PHO
- Susan MacKirdy/NSHA



Reassigning a task sends the new assignee a copy of the task. Once the new assignee accepts the task, it will appear in the reassigned section of the assigner's workload screen.



The copy will have the same **Primary Task ID** as the original task but a new **Sub-Task ID**

2.3 Reject a Task

1. Select the **Pending** radio button.
2. Select a task in the **Tasks** table.
3. Click **Reject**. This will update the status of the task to **Rejected** and place it back onto a queue for assignment by a workgroup Supervisor.

Sub-Task Status	Requested Start Date	Priority	Client	Sub-Task ID	Description	Work Type
Pending	2018 Aug 22	Medium	Tree Willow (270)	98	You have been assigned to be the Primary Investigator for Investigation 230.	INV

Total: 1 Page 1 of 1 Jump to page:

Reassigned Tasks

Sub-Task Status	Sub-Task ID	Client	Priority	Description	Work Type	Reassigned On

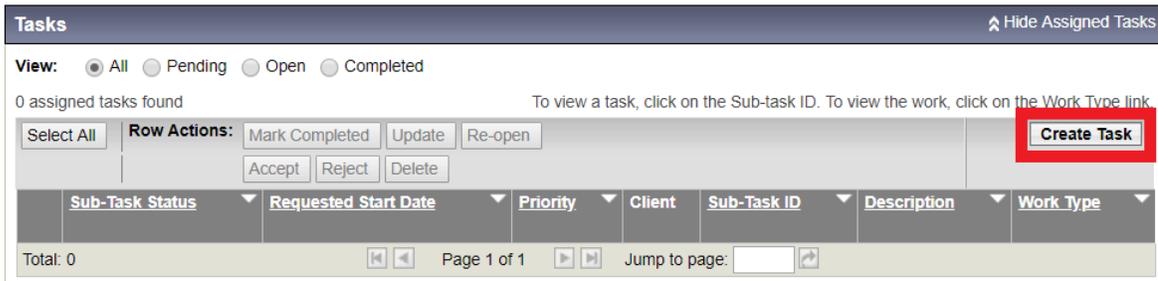
Total: 0 Page 1 of 1 Jump to page:

The task will be removed from the user's **Personal Workload** screen.

 Only tasks in a **Pending** state can be **Rejected**.

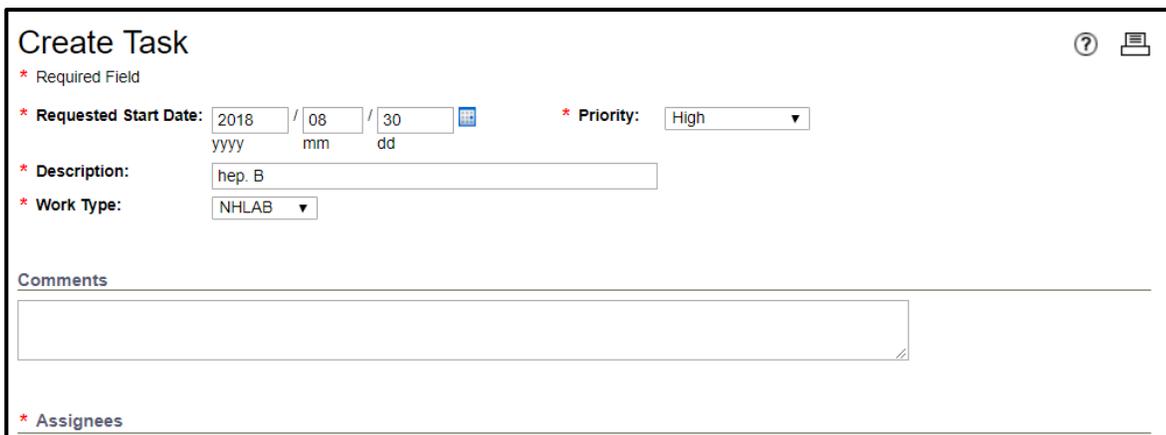
2.4 Create Manual Tasks

1. Click **Create Task**.



The screenshot shows a 'Tasks' interface with a 'Create Task' button highlighted in red. The interface includes a 'View' section with radio buttons for 'All', 'Pending', 'Open', and 'Completed'. Below this, it states '0 assigned tasks found' and provides instructions: 'To view a task, click on the Sub-task ID. To view the work, click on the Work Type link.' The 'Row Actions' section contains buttons for 'Mark Completed', 'Update', 'Re-open', 'Accept', 'Reject', and 'Delete'. The 'Create Task' button is located in the top right corner of the table area. The table has columns for 'Sub-Task Status', 'Requested Start Date', 'Priority', 'Client', 'Sub-Task ID', 'Description', and 'Work Type'. At the bottom, it shows 'Total: 0', 'Page 1 of 1', and a 'Jump to page:' field.

2. Complete the mandatory (*) and optional fields as desired.



The screenshot shows the 'Create Task' form. It includes a 'Requested Start Date' field with a date picker set to 2018/08/30. The 'Priority' field is a dropdown menu set to 'High'. The 'Description' field contains the text 'hep. B'. The 'Work Type' field is a dropdown menu set to 'NHLAB'. There is a 'Comments' section with a text area and an 'Assignees' section at the bottom.

3. To assign the task to one or more individual users, select the **Users** radio button.

You must select at least one assignee: a user (within a workgroup) or a workgroup. Hold Ctrl and then click to select multiple items.

Users:

IOM-Amherst PHO - unmonitored

Task Assigned To:

Workgroup	User

Buttons: Add >, < Remove

4. Select or accept the Organization (defaults to the users logged on organization).

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Eastern Zone > [Antigonish Public Health Office]

Find

Type Search

Start typing the name of the Organization. Matches will begin to appear below. Select the match with the keyboard or mouse.

Organization Name: Antigonish Public Health Office, - **Show Info**

City, Province: - **Hierarchy Type:** Jurisdictional **Status:** Active **Select**

5. Select a **Workgroup**.

Workgroup:

IOM-Amherst PHO - unmonitored

IOM-Amherst PHO - unmonitored

As an 'unassigned' Primary Task

Assign to all members as 'Pending'

Submit **Clear** **Cancel**

Copyright © IBM Corporation 2007, 2016. All Rights Reserved | Contact Us | Terms of Use

Privacy Disclaimer: Access to the System is governed and restricted by organizational privacy and protection policies. Privacy Legislation applies to all use and/or disclosure of health information.

Build 3.0.4.OP9.20180606-0258

6. Select one or more users and click **Add**.

7. Click **Submit**.

You must select at least one assignee: a user (within a workgroup) or a workgroup. Hold Ctrl and then click to select multiple items.

Users:

IOM-Amherst PHO - unmonitored ▾
 Judy Sampson/Halifax PHO

Add > **< Remove**

Task Assigned To:

Workgroup	User
<input checked="" type="checkbox"/> IOM-Amherst PHO - unmonitored	Judy Sampson/Halifax PHO

8. To assign the task to a workgroup and/or all users within it select the **Workgroup** radio button.

You must select at least one assignee: a user (within a workgroup) or a workgroup. Hold Ctrl and then click to select multiple items.

Users:

Central Zone ▾
 Christine Patterson/NSHA
 Erin McClarty/NSHA
 Latifa Mnyusiwalla/NSHA
 Sarah Meddah/Anigonish PHO
 Susan MacKirdy/NSHA

Add > **< Remove**

Task Assigned To:

Workgroup	User
<input type="checkbox"/> Central Zone	Erin McClarty/NSHA

Workgroup:

Central Zone ▾

As an 'unassigned' Primary Task
 Assign to all members as 'Pending'

Submit **Clear** **Cancel**

Copyright © IBM Corporation 2007, 2016. All Rights Reserved | Contact Us | Terms of Use
 Privacy Disclaimer: Access to the System is governed and restricted by organizational privacy and protection policies.
 Privacy Legislation applies to all use and/or disclosure of health information.
 Build 3.0.4.OP9.20180606-0258

9. Indicate whether the task should be assigned to the workgroup as **unassigned** or to all users in the workgroup as **pending**.

10. To assign a task to another workgroup, select the workgroup from the drop-down and click **Submit**.

You must select at least one assignee: a user (within a workgroup) or a workgroup. Hold Ctrl and then click to select multiple items.

Users:

Central Zone ▼

- Christine Patterson/NSHA
- Erin McClarty/NSHA
- Latifa Mnyusiwalla/NSHA
- Sarah Meddah/Antigonish PHO**
- Susan MacKirdy/NSHA

Task Assigned To:

	Workgroup	User
<input type="radio"/>	Central Zone	Erin McClarty/NSHA

Workgroup:

Central Zone ▼

- As an 'unassigned' Primary Task
- Assign to all members as 'Pending'

Copyright © IBM Corporation 2007, 2016. All Rights Reserved | Contact Us | Terms of Use

Privacy Disclaimer: Access to the System is governed and restricted by organizational privacy and protection policies. Privacy Legislation applies to all use and/or disclosure of health information.

Build 3.0.4.OP9.20180606-0258

11. Select a workgroup. Click **Submit**.

You must select at least one assignee: a user (within a workgroup) or a workgroup. Hold Ctrl and then click to select multiple items.

Users:

Central Zone ▼

- Christine Patterson/NSHA
- Erin McClarty/NSHA
- Latifa Mnyusiwalla/NSHA
- Sarah Meddah/Antigonish PHO**
- Susan MacKirdy/NSHA

Task Assigned To:

	Workgroup	User
<input type="radio"/>	Central Zone	Erin McClarty/NSHA

Workgroup:

Central Zone ▼

- As an 'unassigned' Primary Task
- Assign to all members as 'Pending'

Copyright © IBM Corporation 2007, 2016. All Rights Reserved | Contact Us | Terms of Use

Privacy Disclaimer: Access to the System is governed and restricted by organizational privacy and protection policies. Privacy Legislation applies to all use and/or disclosure of health information.

Build 3.0.4.OP9.20180606-0258

3 TEAM WORKLOAD SCREEN

The Maintain Team Workload screen lets a user view work and assign tasks for a workgroup to which they have been assigned as a supervisor and manage the assignment of tasks to workgroup members. The Maintain Team Workload screen initially shows all tasks for the selected workgroup in three categories: Unassigned, Assigned and Completed.

3.1 Managing the Team Workload

The **Team Workload** screen defaults to displaying tasks assigned for the current day. The **All** radio button is selected and the **Requested Start Date From** and **To** dates are defaulted to the current day.

Maintain Team Workload

Team workload for: Central Zone ▼

[View Assignments](#)

Unassigned Tasks Hide Unassigned Tasks

View: All Urgent only Use the same 'From' and 'To' date if you want to view workload for a single day.

Requested Start Date From: / / **To:** / /

0 unassigned tasks found To maintain (assign) a task, click on Primary Task ID. To view the work, click on the Work Type link.

Select All Row Actions:

Status	Requested Start Date	Priority	Client	Primary Task ID	Description	Work Type
Total: 0 Page 1 of 1 <input type="text" value=""/> Jump to page: <input type="text" value=""/>						

Assigned Tasks Hide Assigned Tasks

View: All Urgent only **Assigned To:**

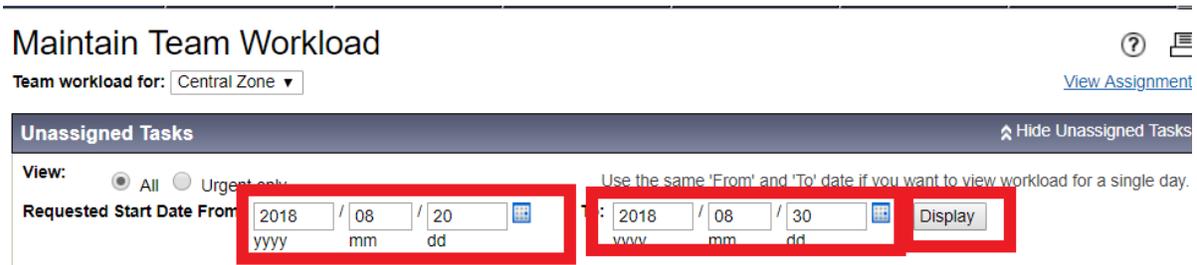
28 assigned tasks found To maintain (reassign) a task, click on Primary Task ID. To view the work, click on the Work Type link.

Select All Row Actions:

Sub-Task Status	Date	Priority	Client	Primary Task ID	Sub-Task ID	Description	Work Type	Assigned To	
<input type="checkbox"/>	Pending	2018 May 28	High	-	132	47	Added as Responsible Org	INV	Erin McClarty/NSHA
<input type="checkbox"/>	Pending	2018 May 29	Medium	-	139	52	Demo task	NOT	Latifa Mnyusiwalla/NSHA
<input type="checkbox"/>	Pending	2018 May 29	Medium	-	139	53	Demo task	NOT	Latifa Mnyusiwalla/NSHA
<input type="checkbox"/>	Pending	2018 May 29	High	ekmtest, client 2 (33)	138	50	Client specific communication	LOG	Latifa Mnyusiwalla/NSHA
<input type="checkbox"/>	Pending	2018 Jun 16	Medium	EKM Demo, Sprint 7 (179)	320	63	You have been assigned to be the Primary Investigator for Investigation 135.	INV	Erin McClarty/NSHA
<input type="checkbox"/>	Pending	2018 Jun 16	Medium	EKM Demo,	322	64	You have been assigned to be the	INV	Erin

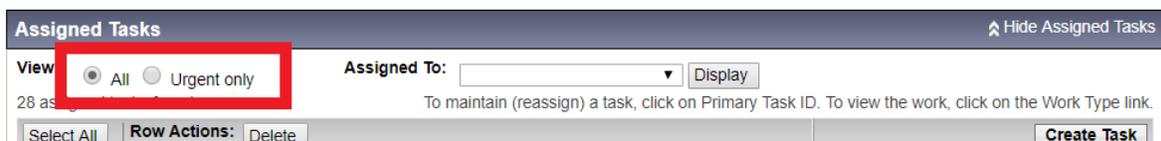
 The tasks section displays tasks based on the selected dates. The assigned tasks section displays all assigned tasks and the completed tasks section has a date range based on the date completed.

1. To adjust the tasks displayed, update the requested start date from and to and click **Display**.



The screenshot shows the 'Maintain Team Workload' interface. At the top, there is a dropdown menu for 'Team workload for:' set to 'Central Zone'. Below this is a section for 'Unassigned Tasks'. The 'View:' section has radio buttons for 'All' (selected) and 'Urgent only'. The 'Requested Start Date From' field is set to '2018 / 08 / 20' and the 'Requested Start Date To' field is set to '2018 / 08 / 30'. A 'Display' button is highlighted. A red box highlights the date input fields and the 'Display' button.

2. Changing the task status from 'all' to 'urgent' will automatically update the display to tasks to just those that have a priority of urgent or all priorities.



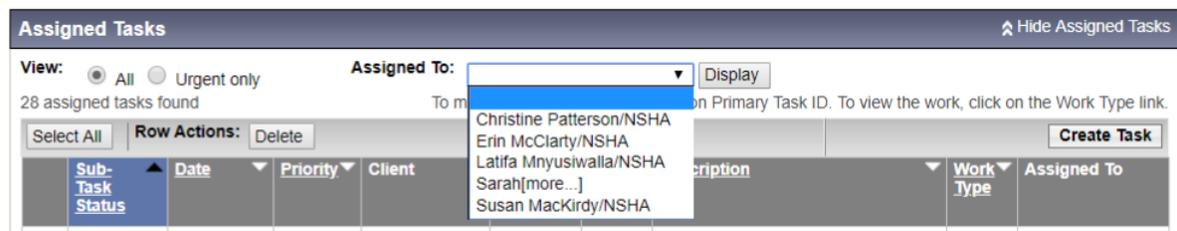
The screenshot shows the 'Assigned Tasks' section. The 'View:' section has radio buttons for 'All' (selected) and 'Urgent only'. The 'Assigned To:' dropdown menu is set to a user. A 'Display' button is visible. A red box highlights the 'View:' radio buttons.

3. To display tasks for a different workgroup, select a new workgroup (at the top of the screen) from the **Team Workload For**.



The screenshot shows the 'Maintain Team Workload' interface. The 'Team workload for:' dropdown menu is highlighted with a red box and is set to 'Central Zone'.

4. In the **Assigned Tasks** section select an individual user from the **Assigned To:** and click **Display**. This will filter the display to just tasks assigned to the selected user.



The screenshot shows the 'Assigned Tasks' section. The 'Assigned To:' dropdown menu is open, showing a list of users: Christine Patterson/NSHA, Erin McClarty/NSHA, Latifa Mnyusiwalla/NSHA, Sarah[more...], and Susan MacKirdy/NSHA. A red box highlights the dropdown menu.

Tip: The same filter is available in the **Completed Tasks** section.

3.2 Assign Tasks

Unassigned tasks can be assigned to a user by:

1. Click the **Primary Task ID** to view the task details.

Unassigned Tasks Hide Unassigned Tasks							
View: <input checked="" type="radio"/> All <input type="radio"/> Urgent only		Use the same 'From' and 'To' date if you want to view workload for a single day.					
Requested Start Date From:		2018 / 08 / 20	To: 2018 / 08 / 30		Display		
		yyyy	mm	dd	yyyy	mm	dd
14 unassigned tasks found To maintain (assign) a task, click on Primary Task ID. To view the work, click on the Work Type link.							
Select All	Row Actions:	Delete				Create Task	
Status	Requested Start Date	Priority	Client	Primary Task ID	Description	Work Type	
<input type="checkbox"/> UNASSIGNED	2018 Aug 20	Medium	EKM Demo Sprint 7 (179)	530	Responsible Organizational Unit 'Nova Scotia Health Authority' has been assigned to Investigation 228.	INV	
<input type="checkbox"/> UNASSIGNED	2018 Aug 28	Medium	LMTEST101, LMTEST101 (296)	575	You have been assigned to be the Primary Investigator for Investigation 244.	INV	
<input type="checkbox"/> UNASSIGNED	2018 Aug 28	Medium	LMTEST101, LMTEST101 (296)	576	Responsible Organizational Unit 'Nova Scotia Health Authority' has been assigned to Investigation 244.	INV	
<input type="checkbox"/> UNASSIGNED	2018 Aug 28	Low	LMTEST101, LMTEST101 (296)	577	DOT visit for Rifampin on 2018 Aug 28 at 00:00.	DOT	
<input type="checkbox"/> UNASSIGNED	2018 Aug 28	Low	LMTEST101, LMTEST101 (296)	578	DOT visit for Rifampin on 2018 Aug 28 at 08:00.	DOT	
<input type="checkbox"/> UNASSIGNED	2018 Aug 28	Low	LMTEST101, LMTEST101 (296)	579	DOT visit for Rifampin on 2018 Aug 28 at 16:00.	DOT	
<input type="checkbox"/> UNASSIGNED	2018 Aug 22	Medium	Tree, Willow (270)	538	Responsible Organizational Unit 'Nova Scotia Health Authority' has been assigned to Investigation 230.	INV	
<input type="checkbox"/> UNASSIGNED	2018 Aug 22	Medium	Tree, Willow (270)	540	Follow Up for Intervention 35.	INT	
<input type="checkbox"/> UNASSIGNED	2018 Aug 23	Medium	ekmtest, client 2 (33)	558	You have been assigned to be the Primary Investigator for Investigation 239.	INV	
<input type="checkbox"/> UNASSIGNED	2018 Aug 23	Medium	ekmtest, client 2 (33)	559	Responsible Organizational Unit 'Nova Scotia Health Authority' has been assigned to Investigation 239.	INV	
Total: 14 Page 1 of 2 <input type="text"/> Jump to page: <input type="text"/>							

2. Click Update

View Task ?

Primary Task ID: 530	Primary Task Status: Unassigned
Requested Start Date: 2018 Aug 20	Priority: Medium
Description: Responsible Organizational Unit 'Nova Scotia Health Authority' has been assigned to Investigation 228.	
Work Type: INV	Work ID: 228
Client: EKM Demo_Sprint 7 (179)	

Comments

Comment Date	Comments	Recorded By

Assignees

Workgroup	User	Sub-Task ID	Sub-Task Status

Update Close

3. Select user(s) or a workgroup to assign the task to using the **User** and **Workgroup** fields. Refer to steps above.

Assign task to users or Transfer task to another workgroup

You must select at least one assignee: a user (within a workgroup) or transfer to another workgroup. Hold Ctrl and then click to select multiple items.

Users:

Central Zone ▾

Christine Patterson/NSHA

Erin McClarty/NSHA

Latifa Mnyusiwalla/NSHA

Sarah[more...]

Susan MacKirdy/NSHA

Add >

< Remove

Task Assigned To:

Workgroup	User
<input checked="" type="radio"/> Central Zone	Sarah Meddah/Antigonish PHO

Workgroup:

Central Zone ▾

As an 'unassigned' Primary Task

Assign to all members as 'Pending'

Submit Cancel

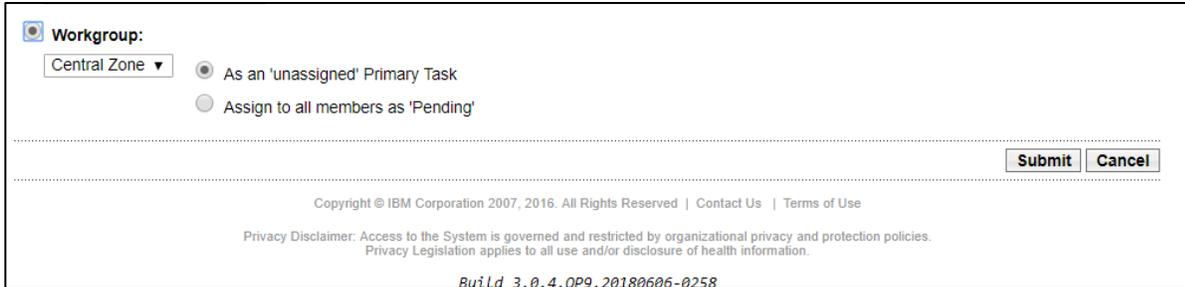
Copyright © IBM Corporation 2007, 2016. All Rights Reserved | Contact Us | Terms of Use

Privacy Disclaimer: Access to the System is governed and restricted by organizational privacy and protection policies. Privacy Legislation applies to all use and/or disclosure of health information.

Build 3.0.4.OP9.20180606-0258

To assign the task to one or more individual users:

1. Select **Users** radio button.
2. Select or accept the **Organization** (defaults to the users' logged on organization).
3. Select a **Workgroup**.
4. Select one or more users and add, click **Submit**



Workgroup:

Central Zone ▼

As an 'unassigned' Primary Task

Assign to all members as 'Pending'

Copyright © IBM Corporation 2007, 2016. All Rights Reserved | Contact Us | Terms of Use

Privacy Disclaimer: Access to the System is governed and restricted by organizational privacy and protection policies.
Privacy Legislation applies to all use and/or disclosure of health information.

Build 3.0.4.OP9.20180606-0258

To assign the task to a workgroup and/or all users within it select the Workgroup radio button:

1. Indicate whether the task should be assigned to the workgroup as unassigned or to all users in the workgroup as pending.
2. Select a **Workgroup**.
3. Click **Submit**

You must select at least one assignee: a user (within a workgroup) or a workgroup. Hold Ctrl and then click to select multiple items.

Users:

Central Zone ▼

- Christine Patterson/NSHA
- Erin McClarty/NSHA
- Latifa Mnyusiwalla/NSHA
- Sarah Meddah/Antigonish PHO
- Susan MacKirdy/NSHA

Task Assigned To:

Workgroup	User
<input checked="" type="radio"/>	Central Zone Erin McClarty/NSHA

Workgroup:

Central Zone ▼

As an 'unassigned' Primary Task

Assign to all members as 'Pending'

Copyright © IBM Corporation 2007, 2016. All Rights Reserved | Contact Us | Terms of Use

Privacy Disclaimer: Access to the System is governed and restricted by organizational privacy and protection policies.
Privacy Legislation applies to all use and/or disclosure of health information.

Build 3.0.4.OP9.20180606-0258

 **Tip:** Tasks in the assigned section can be **reassigned** using the same steps.

 **Tip:** If a user selects a task that is assigned them, they are given the option to accept or reject the task (if it is pending).

 **Tip:** These functions work the same as the personal workload screen

Select All		Row Actions: Delete					Create Task
Status	Requested Start Date	Priority	Client	Primary Task ID	Description	Work Type	
<input checked="" type="checkbox"/> UNASSIGNED	2018 Aug 20	Medium	EKM Demo, Sprint 7 (179)	530	Responsible Organizational Unit 'Nova Scotia Health Authority' has been assigned to Investigation 228.	INV	
<input type="checkbox"/> UNASSIGNED	2018 Aug 28	Medium	LMTEST101, LMTEST101 (296)	574	You have been assigned to be the Primary Investigator for Investigation 244.	INV	
<input type="checkbox"/> UNASSIGNED	2018 Aug 28	Medium	LMTEST101	575	Responsible Organizational Unit 'Nova Scotia Health	INV	

3.3 Delete Tasks

1. Select one or more tasks in either the unassigned or assigned task sections.
2. Click **Delete**.
3. The task(s) will be removed from display on the **Team Workload** screen.

3.4 Re-Open Tasks

1. Select a task in completed task section.
2. Click **Re-open**.

Tasks Hide Assigned Tasks							
View: <input type="radio"/> All <input type="radio"/> Pending <input type="radio"/> Open <input checked="" type="radio"/> Completed							
1 assigned tasks found To view a task, click on the Sub-task ID. To view the work, click on the Work Type link.							
Select All		Row Actions: Mark Completed Update Re-open			Create Task		
		Accept Reject Delete					
Sub-Task Status	Requested Start Date	Priority	Client	Sub-Task ID	Description	Work Type	
<input checked="" type="checkbox"/> Completed	2018 Aug 20	Medium	EKM Demo, Sprint 7 (179)	142	You have been assigned to be the Primary Investigator for Investigation 228.	INV	

Total: 1 Page 1 of 1 Jump to page:

3. The update task screen will be displayed. Enter a comment.
4. Click **Submit**.

Re-open Task ? 🖨️

*** Required Field**

Primary Task ID:	529	Primary Task Status:	Completed
Sub-Task ID:	142	Sub-Task Status:	Completed
Requested Start Date:	2018 Aug 20	Priority:	Medium
Description:	You have been assigned to be the Primary Investigator for Investigation 228.		
Work Type:	INV	Work ID:	228
Client:	EKM Demo_Sprint 7 (179)		

*** Comments**

new datas needs to be entered

Comment Date	Comments	Recorded By

Assignees

Workgroup	User	Sub-Task ID	Sub-Task Status
Central Zone	Meddah, Sarah/Antigonish PHO	142	Completed

Submit
Cancel