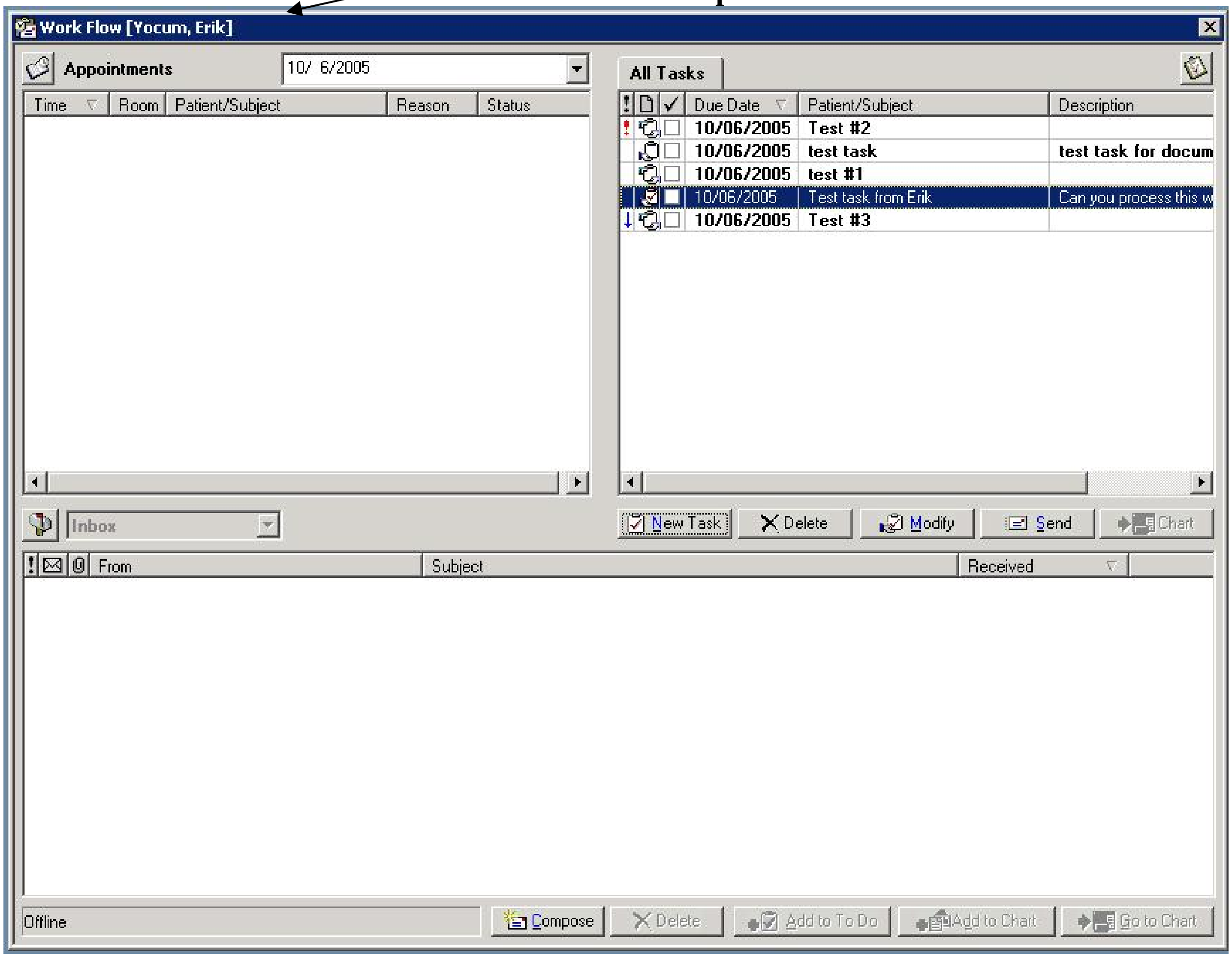
INBOX / TASKS

The Task Pane within the Workflow screen allows users to receive, send and manage tasks

THE WORKFLOW / TASK WINDOW

You should always see your name in the top banner:



SORTING

You can sort your tasks (A-Z / Z-A), or in Date Order (Due Date column) by clicking on the column header. You will see a "triangle" display in the column header to the right of the text. This triangle indicates which column you are sorting. If the triangle is pointing upward, your sort on that column will be alphabetical A-Z, or in date order - chronologically. If the triangle is pointing downward, your sort on that column will be alphabetically Z-A, or in date order – reverse-chronological order.

ICONS: the following icons represent - -

 Indicates a task you have added to your Task List

 Indicates a task you have sent to another user or group of users

 Indicates a task you have sent to another user or Group of users and the task has been accepted by a user

 Indicates a task that has been sent to you from another user

 Indicates a task that has been sent to you, and you have ACCEPTED the task

ACCEPTING TASKS

When you receive a Task, the Task will be displayed in **Bold**. If you accept the task, the Task will stay on your Task List, and be automatically deleted from the task lists of the other recipients. Once you accept a task, the task will no longer be **Bold**.

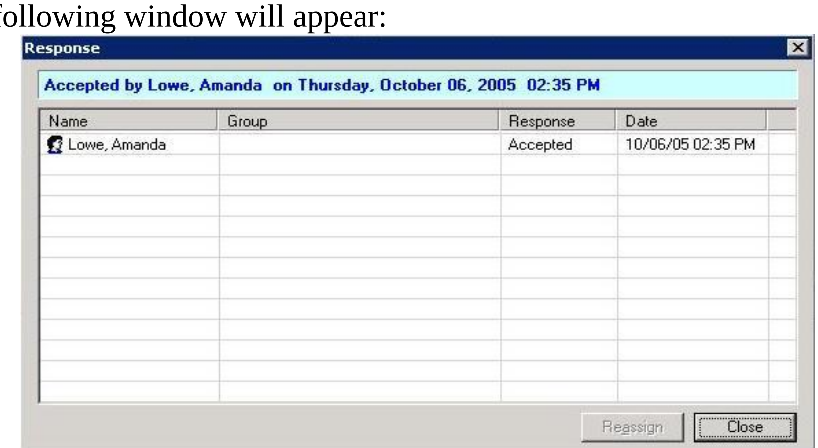
If the Assigned Task belongs to you, double-click on the task (or highlight the task and click on the *Modify* button on the bottom toolbar).

Click "*Accept*" to keep the task; Click "*Decline*" and the task will be deleted from your task List.

SENDING TASKS

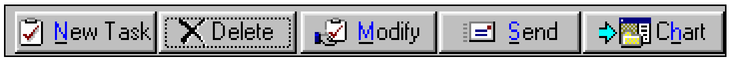
If you send a task to another user or group of users, the task will also appear on your task list. The task will remain in Bold print until at least 1 users has Accepted the task.

You can monitor the status of tasks to see if they have been responded to, accepted or declined by double-clicking on the task, then click on the "Response" button to the right of the "Assigned To" field. The following window will appear:



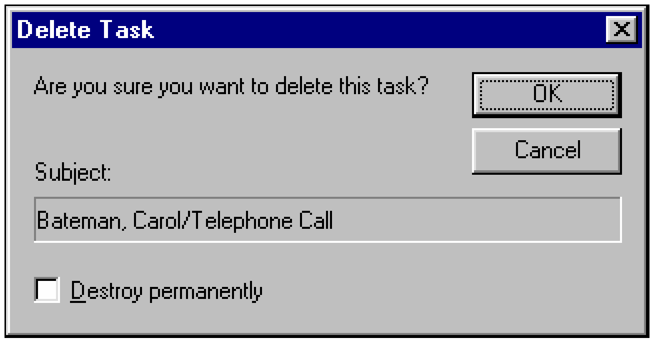
From the details window you can see who Accepted or Declined or has not responded to tasks that you have sent.

<u>THE BOTTOM TOOLBAR</u>



New Task: Create a new task for your Task List or to Send a Task to another User

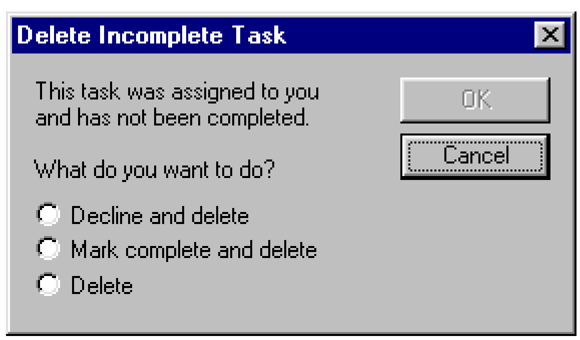
Delete: Deletes a Task



When deleting a task, the task is not permanently deleted, just deleted from the View on your Task List. To permanently delete the task from your task list, click on the "Destroy Permanently" checkbox.

Tasks that are **NOT** Destroyed permanently – are displayed with the ~~strikethough~~ line through them.

If a task has been assigned to a ***Group***, the task **<u>IS NOT</u>** a task that belongs to you, **<u>DO NOT</u>** use the "*Delete*" button on the bottom toolbar – which displays the following window:



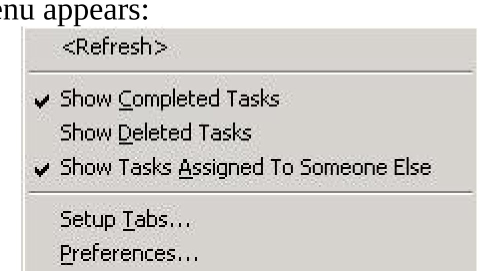
Using any of these radio buttons, will **DELETE TASKS** from your Task List, the Sender's Task List, and other Group Recipient's Task Lists.

It is **OK** to use the "Delete" button on the bottom toolbar to delete tasks that **BELONG TO YOU** (tasks that you have accepted).

PREFERENCES

Click on the Clipboard icon to the right of “All Tasks”: 

The following drop-down menu appears:



Refresh: Click to “Refresh” your task list. Your task list will automatically refresh every ‘1 minute’ unless you change it in the preferences.

Show Completed Tasks: Check off this line item to show tasks which you have marked as completed, but have not deleted from your task list. Completed tasks will show up with a check in the checkbox in the column 3.

Show Deleted Tasks: Check off this line item to show tasks which you have marked as deleted, but have not permanently deleted from your task list. Deleted tasks will show up with a strikethrough line through them.

Show Tasks Assigned To Someone Else: Check off this line item to show tasks that are assigned to someone else to complete, or follow up on.

Setup Tabs: Use this line item to set up special searches, like ‘Rx Refills’ Just click on the add button on the left, and scroll through the search items on the right.

Preferences: Allows user to set up specific preferences that will apply only to their user login.

<u>Display</u>: Change the time interval in which you Task List refreshes. Default is 1 minute.

<u>Colors</u>: Change the text color of tasks in your task list to be able to visually differentiate tasks by color.