Tasks v1.9 Release Guide

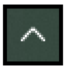
Summary of Changes

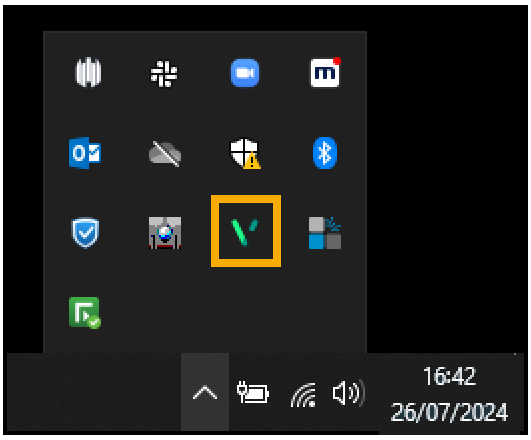
Tasks release **1.9** contains the following new features and improvements:

- **Single Sign On (SSO)** - In preparation for single sign on across all Cegedim Primary Care Solutions, when you log into **Tasks**, you are now presented with the Vision Single Sign On screen:

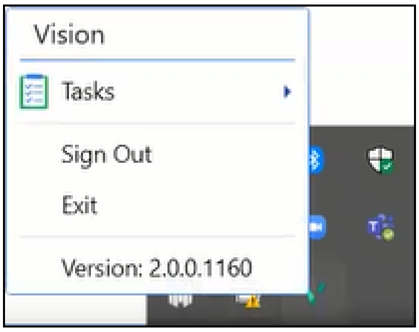
> **Important** - It is vital that the first time you log on to **Tasks**, following the **1.9** update, you are connected to the internet. This ensures your **SSO** set up runs correctly.

Simply enter your registered email address and password in the usual way and select **Sign in**, this triggers the **SSO** update. Single Sign on enables you to switch between applications without having to log in again.

- **System Tray Settings** - The **System Tray Settings** have been updated ready for the release of our exciting new applications. Select the **System Tray Arrow**  and right click the **Vision** logo:

  The **Vision** menu displays:

  Select as required:

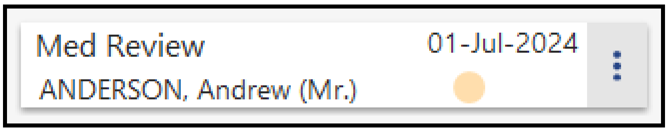
  - **Tasks**:
    - **Open** - Select to open **Tasks**.
    - **Quit** - Select to close **Tasks**.
  - **Sign Out** - Select to close all **Cegedim Primary Care Solutions**.

    Note - This leaves the SSO application running on your machine. You can switch between applications without the need to sign in.

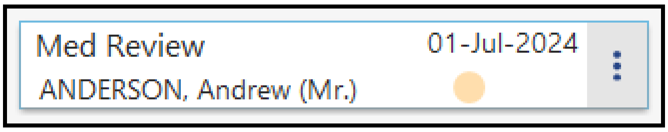
  - **Exit** - Select to close all **Cegedim Primary Care Solutions**.

    Note - This closes the SSO application on your machine. To open an application, you must sign in again.

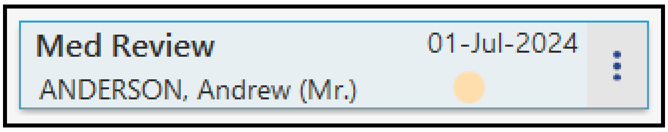
- **Tasks in your List** - The way tasks display in your task lists have been updated to more clearly differentiate between read, unread and selected tasks:



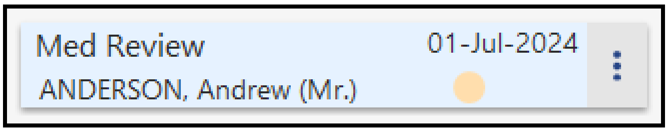
Read task.



Read task you are hovering over, note the thin blue line around the task.

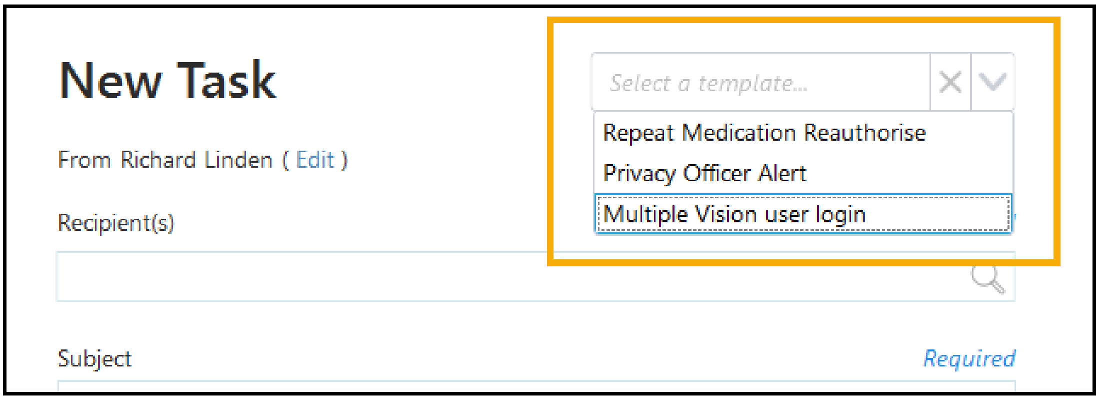


Selected task displays in grey.



Unread tasks display in pale blue.

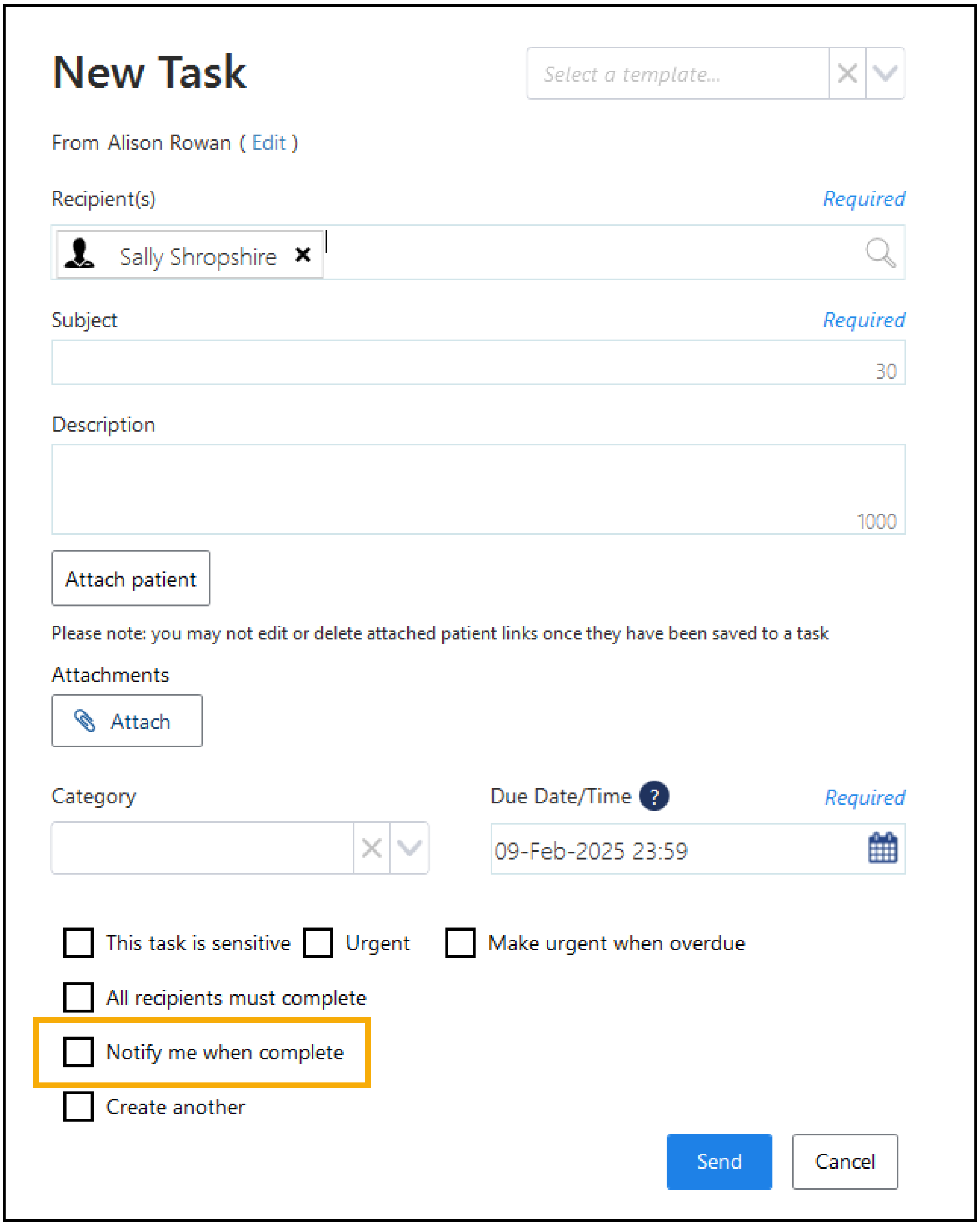
- **Task Templates** - You can now select a Task Template from within the **New Task** screen:



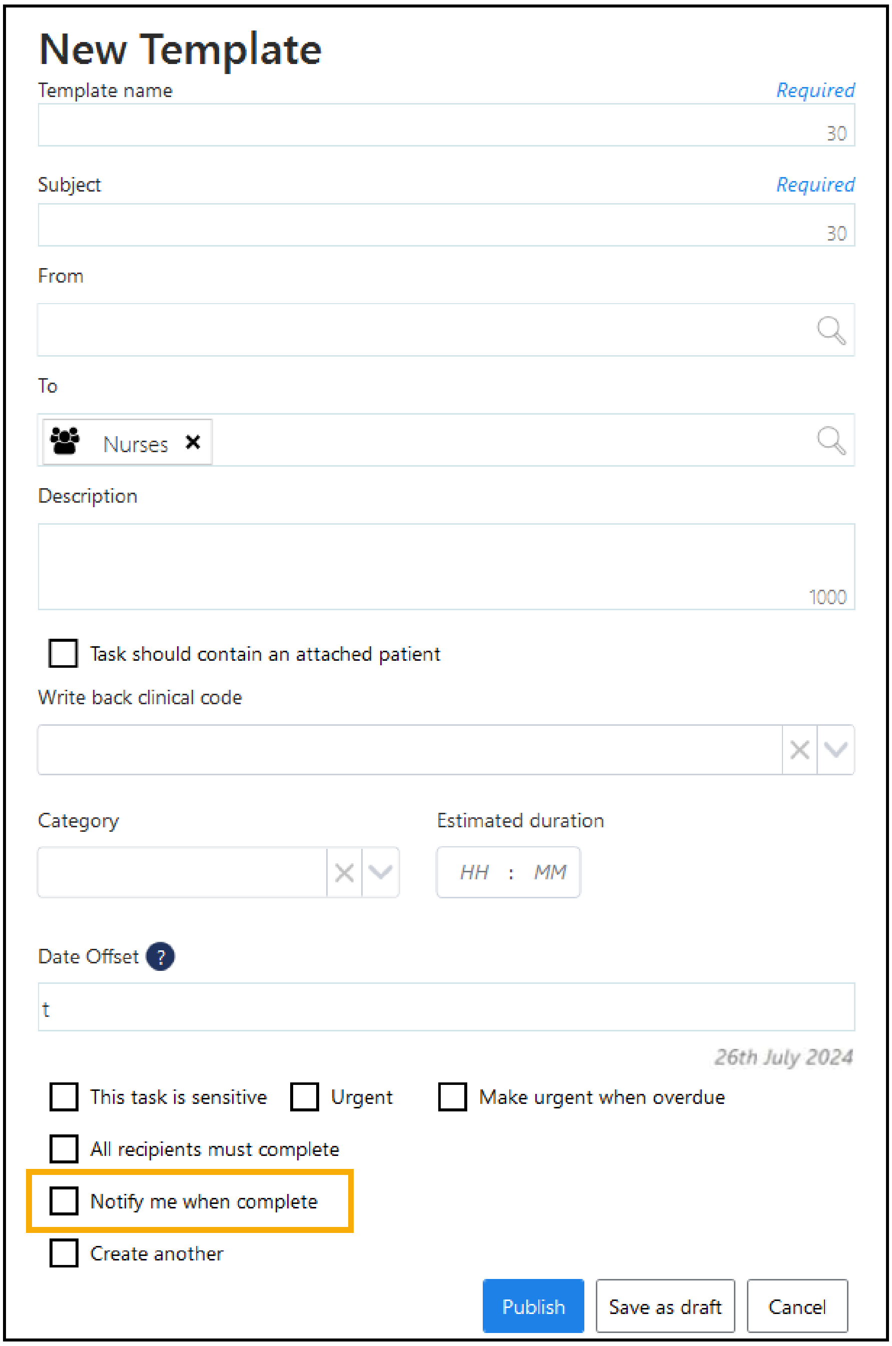
- **Notify me when complete** - You can now select to be notified when a task is completed by its recipient(s):

Note - The **Notify me when complete** option is not available if you select to send the task to yourself only.

- **New Task** - Tick **Notify me when complete** to automatically receive an announcement when the task is marked **Complete:**



- **New Template** - Tick **Notify me when complete** for the originator to automatically receive an announcement when any task created from the template is marked **Complete**:

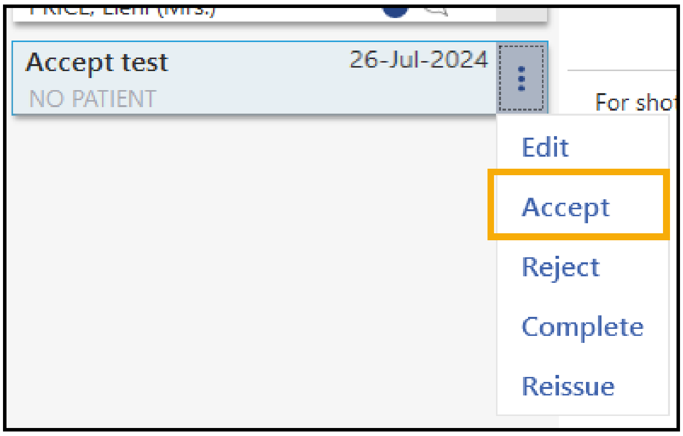


Training Tip - When creating a task from a template the **Notify me when complete** tick can be removed if it is not required.

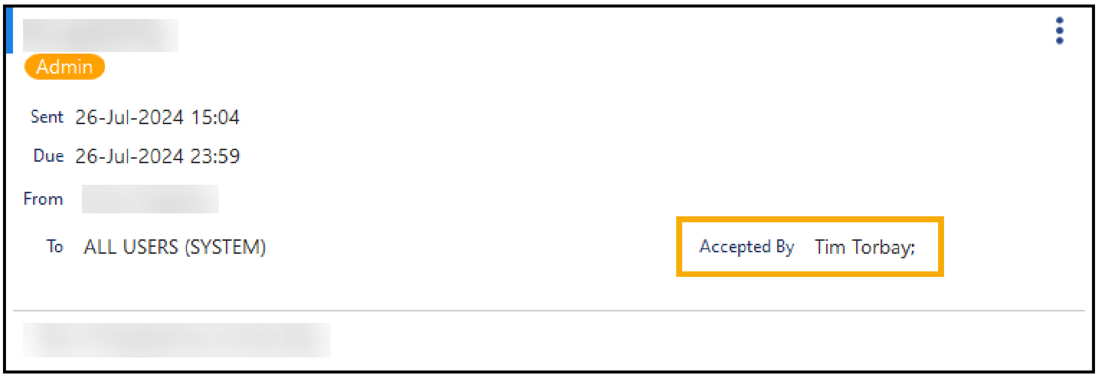
When a recipient completes a task, a **Task completed** announcement is automatically sent to the originator of the task. **Task Completed** announcements expire after seven days:

- **Accepting a Task** - If a task is allocated to a group you are a member of, you can select to **Accept** it. This indicates to all other recipients and the originator that you are planning on actioning it. To mark a task as accepted:

  1. From your **My tasks** list, select **Options** .
  2. Select **Accept**:

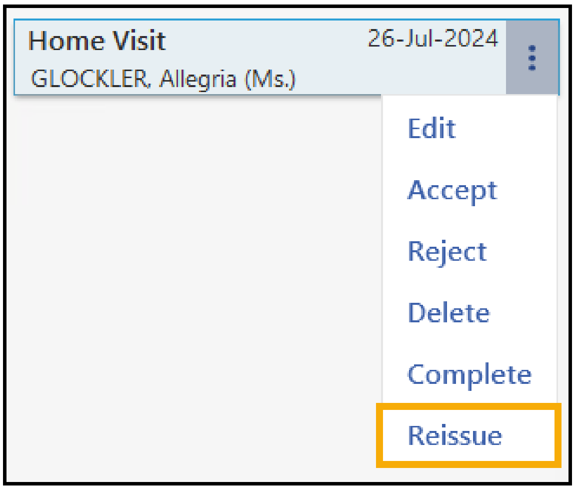


The new **Accepted by** section on the task updates with your name:



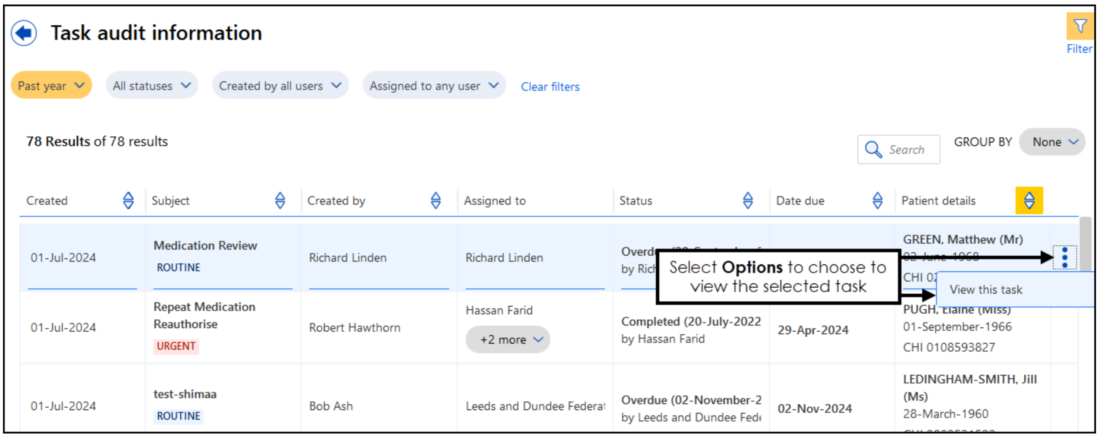
Note - Even if a member of the group has accepted a task, it is still available for any member of the group to complete.

- **Reissuing Tasks** - If a task is allocated to you in error, or you need to send it on to another member of staff, you can now select **Options** - **Reissue**:



The **Edit Task** screen displays with a blank **Recipient(s)**. Choose the new recipient(s) from the available list and select **Update** to reallocate the task.

- **Tasks Audit** - You can now open a task from the **Tasks Audit** screen for viewing purposes. From the end of the audit row, select **Options** - **View this task**:



Note - View this task is for display purposes only, you cannot update the task from here.

- **Out of Office** - The **Out of Office** functionality has been updated:
    - System Administrators now have the ability to set up an out of office setting for other members of staff. This is designed to cover unexpected absences.
    - The **Out of Office** toggle is removed

See **Setting an Out of Office** on page **8** for full details.

Setting an Out of Office

To ensure tasks are processed when staff are away, an out of office should be set up to cover any absence.

An out of office can be set up by either the staff member themselves for a planned absence, or a System Administrator for a member of staff with an unplanned absence.

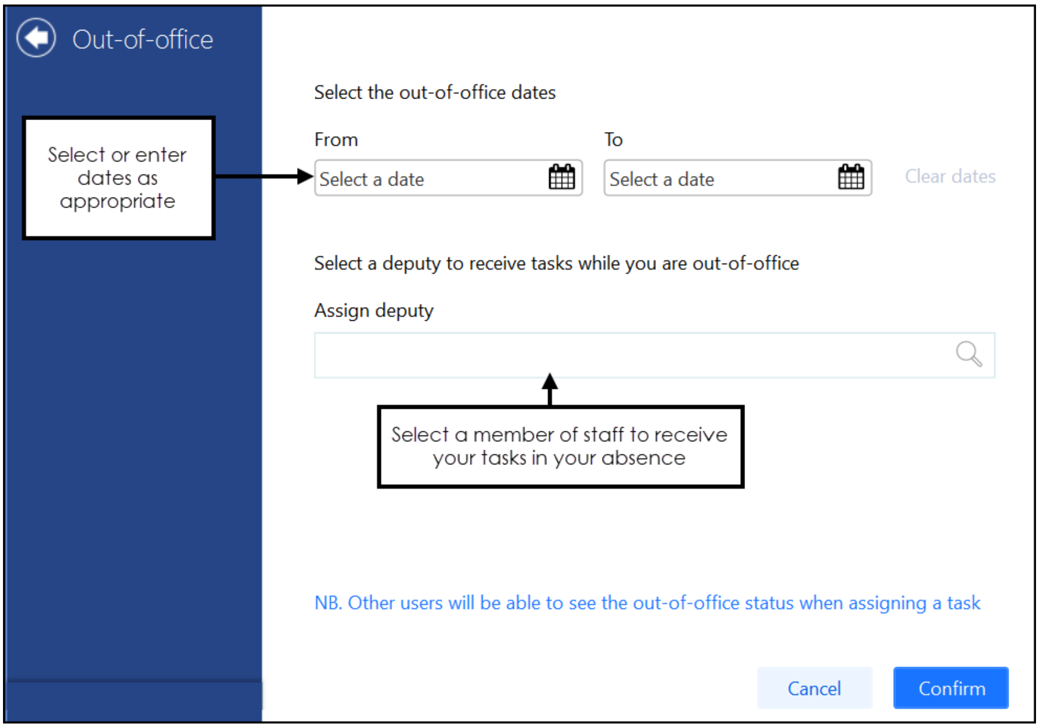
Once an out of office is set, any tasks sent to the recipient automatically divert to the assigned deputy.

Note - The original recipient does not receive a copy of a diverted task.

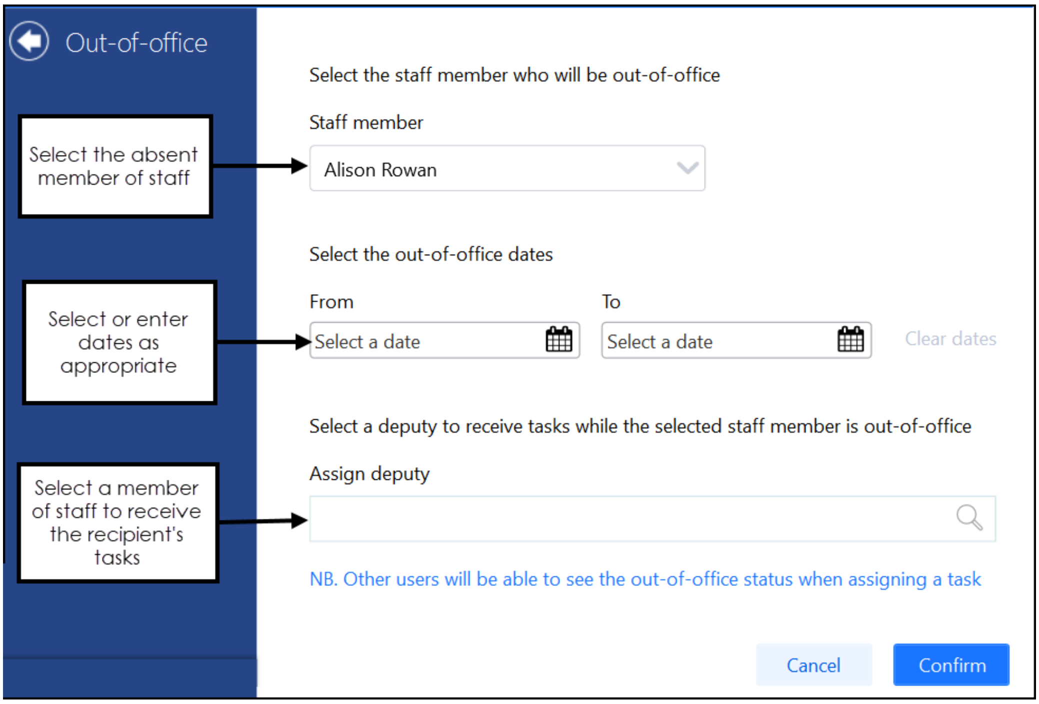
To set up an out of office notification:

1. From any screen in **Tasks**, select **Settings** .
2. Select **Out of office** and the **Out of Office** screen displays, this screen varies depending on your security settings:

- Standard staff member:



- System Administrator:



Complete as required:

- **Staff member** (System Administrators only) - Select the member of staff you are setting this out of office for, select yourself if this is to cover your own absence.
- **From** - Select a date for your out of office message to begin.
- **To** - Select a date for your out of office message to finish.
- **Select a deputy to receive tasks while you are out-of-office** - Under **Assign deputy** select a member of staff or a group to receive your/the recipients tasks during the time span set up.

3. Select **Confirm** to save your Out of Office settings.

Once you have set an out of office:

- If someone selects a group you are a member of, the number of staff with an out of office/total number of staff in the group is shown in brackets.
- If someone selects you to receive a task, your name displays in red:

- A diverted task displays as **REDIRECTED** on the **Activity** tab: