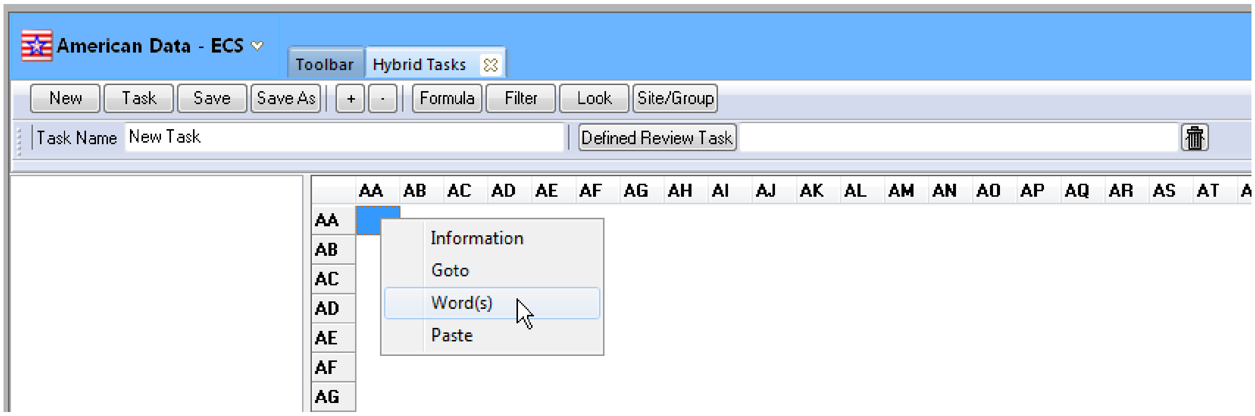
Hybrid Tasks Setup

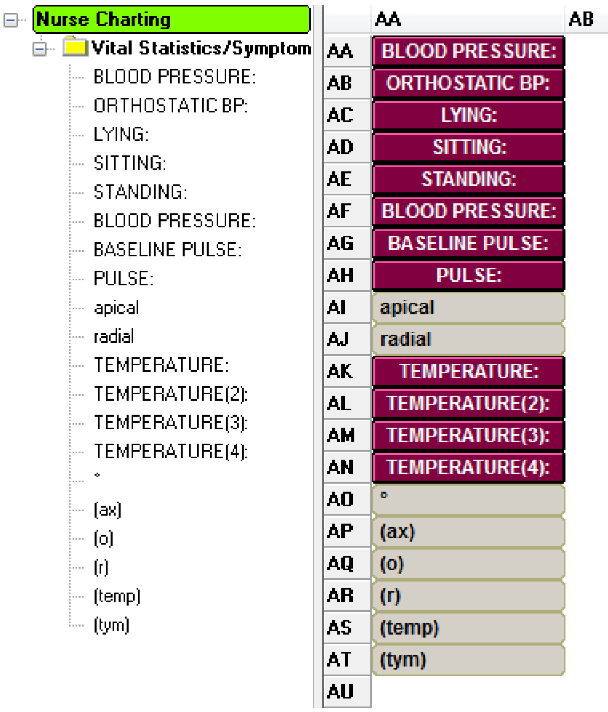
Hybrid tasks allow the option to pull words from several topics (tabs) or folders onto one screen. There is no need to arrow forward to move to the next folder. All the charting is then stored in the individual folders. Setting up hybrid tasks is a User Group right that you must give to users. Go into the setup of User Groups and you will find this right in the +Rights tree. By default, groups do NOT have rights to the setup of Hybrid Tasks.

Hybrid Task Setup

1. Click **American Data – ECS** and follow the path **Setup > Hybrid Task**.
2. The Hybrid Task screen appears. Enter the name of the new task in the Task Name field.
3. Right-click on the first white cell on the screen to enter in the first hybrid word. Choose **Word(s)** from the list.



4. Select a section and double-click on the desired topic.
5. Within the folder, click to highlight the desired words. If more than one word is needed, press and hold Ctrl to highlight multiple words.
6. Click **OK,** and the highlighted words appears in the hybrid task setup screen.
7. On the left portion of the screen, the Topic tab tree is now available. Choose the plus sign **+** to see the folder tree. The tree shows the section, topic, and words which were chosen to create the first column of the hybrid task.



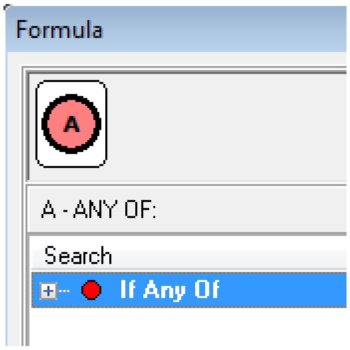
8. Continue to choose the next available cell (for example, AB), right-click, and select **Word(s)** from the list. Select all sections, topics, and words needed to complete the hybrid task.
    - If you want to make a change to the setup of a word, highlight the word and click the **Setup** icon. The word selected in the hybrid task appears with a red circle around it.
    - To delete a word from the task, simply select the word and press Delete on your keyboard.
9. A text box appears with the task name. If the task name is correct, click **OK**. If you would like to make changes, simply type over the existing words and then click **OK**.
10. On the hybrid task toolbar, you will also find Formula, Filter, and Look. These options allow the user to establish setups for loading the task in a View screen. While in the setup of the task, the user may click these buttons at any time to make adjustments.
11. Click **Defined Review Task**. Select a task and click **Load**.
    - The Defined Review Task creates two functionalities in one step: It creates the View task and also the charting defined review. The View task is used while in the View screen to view or edit charting. The charting defined review is the previously entered charting seen on the bottom of the Write (documenting) screen while entering charting or orders through the Write icon.
    - To delete the selected task, click the trashcan icon.
12. Click **Save**. A text box will appear with the task name. If the task name is correct, click **OK**. If you would like to make changes, simply type over the existing words and then choose **OK**.
13. Select the sites that are allowed access to the newly created task and click **OK**.
14. Select the user groups that are allowed access to the new task and click **OK**.

Other Setup Options

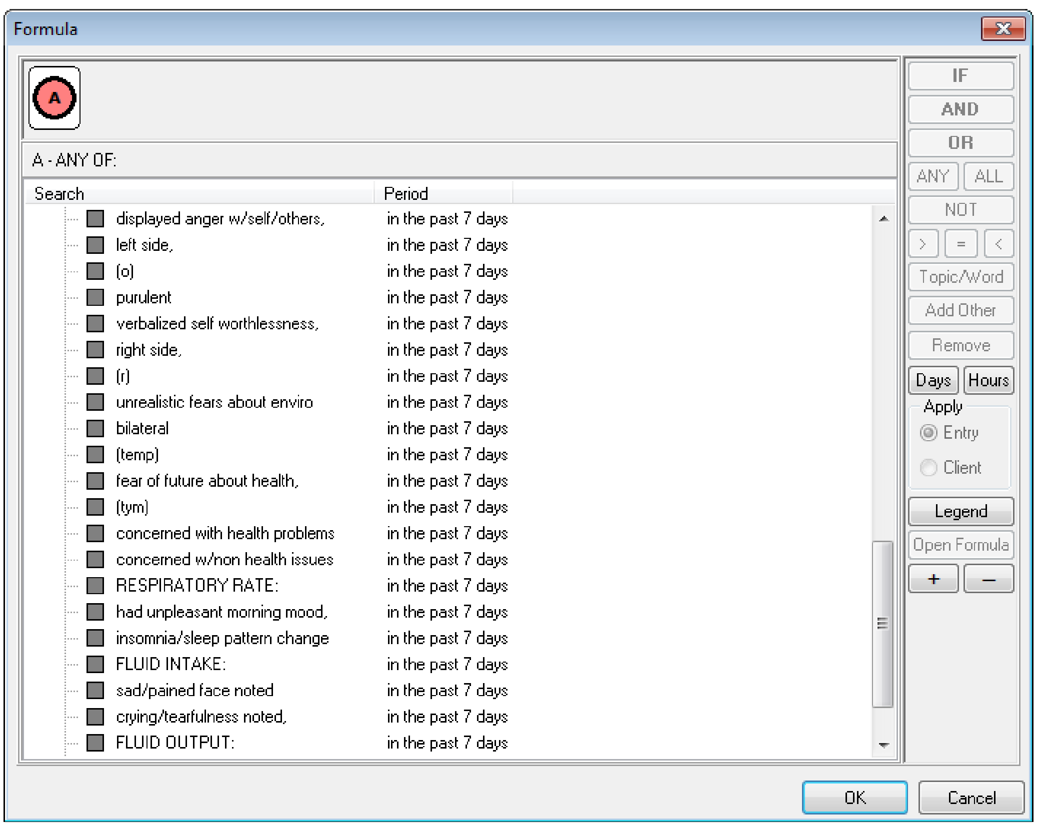
These options will most likely be used when setting up the defined review task.

Formula

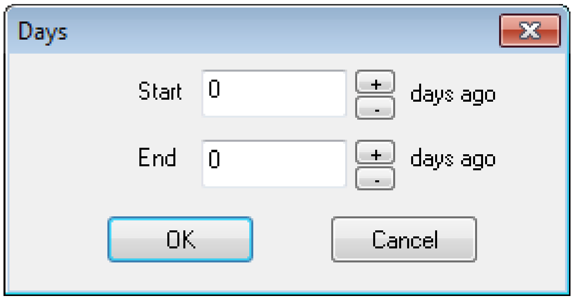
- The Formula button  on the Hybrid Task toolbar may be used to add a look back period for days or hours.
- To use the formula set up, choose the **Defined Review Task** button, highlight the task, and load.
- The formula screen will show If Any Of



- Choose the plus sign to open the formula showing the underlying words



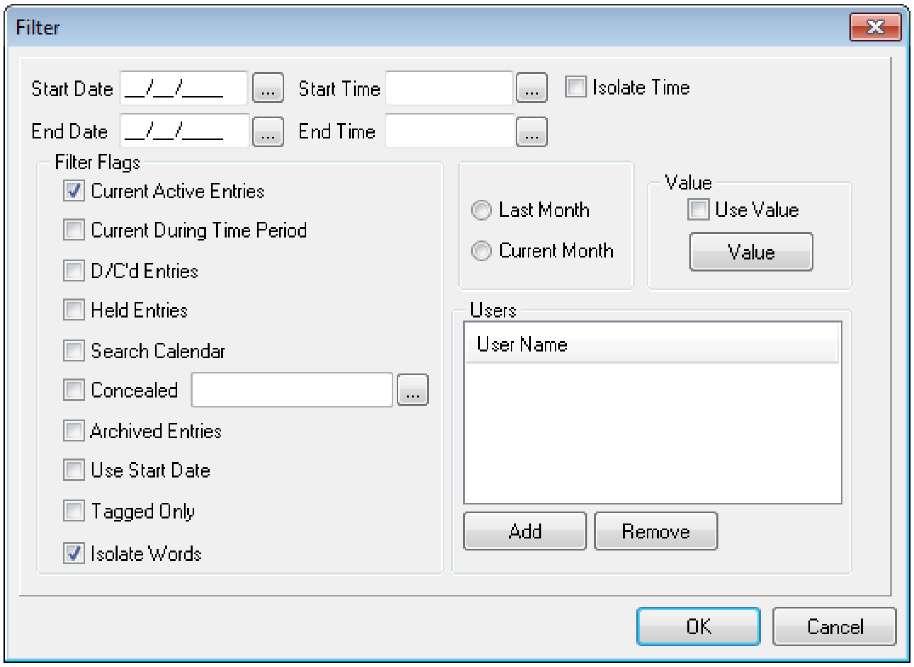
- Highlight the word to add a day or hour look-back period or you may choose **If Any Of** to add the look-back to all words in the formula.
- Choose the **Days** or **Hours** button word.
- In the Start field of the text box, enter the number of days or hours the look-back period will begin. For example, one week would equal 7 days. The end will equal 0 if the look-back should be the current date.



- Repeat the above process until all words have desired days or hours look-back periods.

Filter

- There are several set up options under the Filter Filter button:



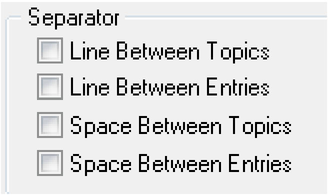
- Some of the available options include: looking at specific date ranges or times, viewing a specific user's charting, viewing current, archived, or discontinued entries.

Look

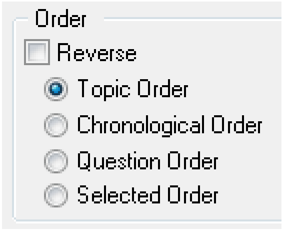
There are several more setup options under the Look 

button:

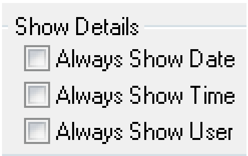
- The **Separator** fields allow cosmetic view changes such as placing lines or spaces between topics or entries.



- The **Order** fields allow view order to be changed.
    - Topic Order shows the chosen topic tab.
    - Chronological Order shows in date order from oldest to most current. To set the view from most current to oldest, the **Reverse** checkbox must be selected in addition to Chronological Order.
    - Question Order shows the order in which question words were selected.
    - Selected Order shows the order in which button words were selected.



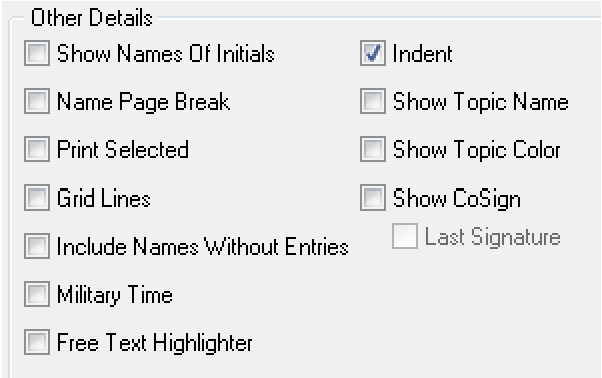
- **Show Details** field allows you to select whether to always show the date, time, and/or user which entered the charting.



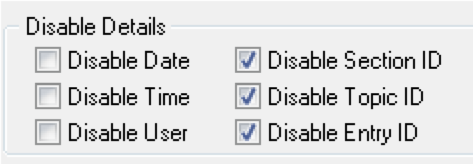
There are many options in the **Other Details** field.

- **Show Names of Initials** shows the user name of the initials on the entry.
- **Print Selected** will print only the entries which are highlighted red.
- **Grid Lines** put a grid in the background of the view entry screen. Grids are seen around the date, time, user initials, and entry for easier viewing.
- **Military Time** coverts charting time to military time.
- **Free Text Highlighter** will show any free text (typed words) in blue highlights.
- **Show Topic Name** will show the topic tab and folder where the entry was charted.
- **Show Co-Sign** will show the date, time, and initials of the user who co-signed the entry.

- **Select Last Signature** to have only the most recent co-signature displayed on the entry rather than ALL co-signatures for the entry.



- **Disable Details**. The date and time the entry is made is displayed by default. If the user would like to hide this information, placing checks here will do so. Disable user hides the initials of the user making the entry. Section ID, Topic ID, and Entry ID are used by American Date technical staff.



Site/Group

- The Site/Group button 

shows access to the hybrid task.
- Sites or Groups may be added or removed by choosing the **Add** and/or **Remove** buttons