

IOM004- Open Investigations Report - WS	Name of Activity: Standard Reports IOM004- Open Investigations Report Role performing Activity:		
Panorama – IOM WORK STANDARD	Location:		Department:
	Document Owner:		
	Date Prepared: 26 June 2018	Last Revision: Mar 2022	Date Approved:

Purpose: The purpose of this report is to detail a list investigations in your responsible org by status of open or closed. Investigations may be filtered by reported date range, encounter group(s), disease(s), disposition(s), and classification(s).

May be used for daily work management along with the **Investigation follow up report**.

Essential Tasks:	
1.	Select Investigations tab
2.	Select LHN -> Reporting & Analysis -> Standard Reports <ul style="list-style-type: none"> ➤ Select Report Type screen is displayed ➤ Expand Case section
3.	Select IOM004-Open Investigations Report
4.	Select Investigation Status <ul style="list-style-type: none"> ➤ Open or Closed ➤ Defaults to Open
5.	Select Reported Date (Received) From Select Reported date (Received) To Optional
6.	Select an Encounter Group Optional
7.	Select Disease (field becomes available when an encounter group is selected.) <ul style="list-style-type: none"> ➤ Optional ➤ This is filtered by the Encounter Group ➤ Multiples can be selected (to select all, click on the first – hold shift – click on last – release shift)
8.	Select Investigation Disposition Optional <ul style="list-style-type: none"> ➤ Multiples can be selected
9.	Select Investigation Classification Optional <ul style="list-style-type: none"> ➤ Multiples can be selected

Essential Tasks:

- 10.** Click the **Generate Report** button – for **Chrome** users
The report will take a few seconds to open – will appear to reload (report may not open but can be found in a tab called CrystalReportViewer at the bottom of the page)
- Click the **Generate Report** button – for **Firefox** users
- A window pops up asking you to open the report in Excel
 - Click OK
 - Excel will open up, the report will take a few seconds to open
- 11.** If the report does not “complete” then you can try to “Schedule” the report. Panorama allows the User to schedule a report to be run rather than generating immediately. To Schedule a report the user will follow the exact same process as they would to “Generate” the report.
- After filling in the report criteria the user will:
- Click the **Schedule Report** button
- The “Schedule Report Details” window opens up
 - If the “NOW” checkbox is checked the report will be schedules to run right away
 - If the “NOW” checkbox is not checked then the user can select the time and date to schedule the report to run
 - User can also select to have this report run once or recurring by selecting one of the radio buttons
 - If the recurrence button is selected the user can select the frequency of the report by selecting from the droplist. The user can also select the From Date, To Date and time to schedule the report
 - Once all the Scheduling Criteria is entered the user will click on “SAVE”
- To View the Report Status
- Return to the Reports Page by clicking on the “reports” button on LHN Menu
 - Click the radio button next to the report scheduled to run
 - Click on the “View report Status” Button on top left of page
 - The status column will indicate if the report has completed or is still running
 - If completed then the user can view the results.