

<b>Panorama – IOM WORK STANDARD</b>	<b>Name of Activity:</b> <b>Run Standard Reports</b> - IOM002-Weekly Investigation Line List Report		
	<b>Role performing Activity:</b>		
	<b>Location:</b>		<b>Department:</b>
	<b>Document Owner:</b>		
	<b>Date Prepared:</b>	<b>Last Revision:</b> Mar 2022	<b>Date Approved:</b>

**Purpose:** An investigation line list run weekly for use by Managers, Epi's or MHO's for rapid assessment of disease patterns.

<b>Essential Tasks:</b>	
<b>1.</b>	<b>Select Investigations tab</b>
<b>2.</b>	Select <b>LHN -&gt; Reporting &amp; Analysis -&gt; Standard Reports</b> <ul style="list-style-type: none"> <li>➤ Select Report Type screen is displayed</li> <li>➤ Expand Case section</li> </ul>
<b>3.</b>	Select <b>IOM002-Weekly Investigation Line List Report</b>
<b>4.</b>	Select <b>Investigation Status</b> <ul style="list-style-type: none"> <li>➤ Open or Closed</li> <li>➤</li> </ul>
<b>5.</b>	Enter <b>Report Received From</b> and <b>To</b> Date <ul style="list-style-type: none"> <li>➤ Enter the desired date range,</li> <li>➤ If left blank the date range will be 1900-01-01 to 2023-06-13</li> </ul>
<b>6.</b>	Select <b>Investigation Classification</b> <ul style="list-style-type: none"> <li>➤ Optional</li> </ul>
<b>7.</b>	Click the Generate Report button <ul style="list-style-type: none"> <li>➤ A window pops up asking you to open the report in Excel</li> <li>➤ Click Yes</li> <li>➤ The report will take a few seconds to open</li> </ul>

**8.** 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 scheduled 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 and 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.

Attribute (Label on Report)	Business Rule(s)
Disease	1. From the most recent row of the disease event history table
Microorganism	
Taxonomy Level 1	E.g. Stage - Acute
Taxonomy Level 2	
Taxonomy Level 3	
Last Name	
First Name	
Investigation ID	
Address at Time of Investigation	2.
City	3. From the address at time of investigation
Postal Code	4. From the address at time of investigation
Age	5. Age at time of investigation 6. The [Age at Time of Investigation] will be calculated using the earliest [Report Date (Received)] on the Reporting Notification. If the earliest [Report Date (Received)] changes, recalculate and re-display [Age at Time of Investigation] in the Investigation context header. 7. Should display at Years and Months eg. 1 year(s) 4 month(s) or 0 year(s) 3 month(s) for clients that are >= 1 year old. Display as Month(s) Day(s) for clients < 1 year old e.g. 1 month(s) 2 day(s)

Gender	
Onset Sign or Symptom	
Symptom Onset Date	8. For Symptom indicated as 'Use as Onset'.
Specimen Collection Date	9. Report shall only include the earliest specimen collection date for earliest positive result directly associated or pertinent to the investigation.
Investigation Outcome(s)	
Outcome Date	