

eBase v8
Action module manual



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1 Introduction

The action module allows certain actions to be assigned to employees or groups of employees. An action can be created for a patient or defined as a general action.

1.1 Setting up action module.

The action module can be set up from the admin menu.

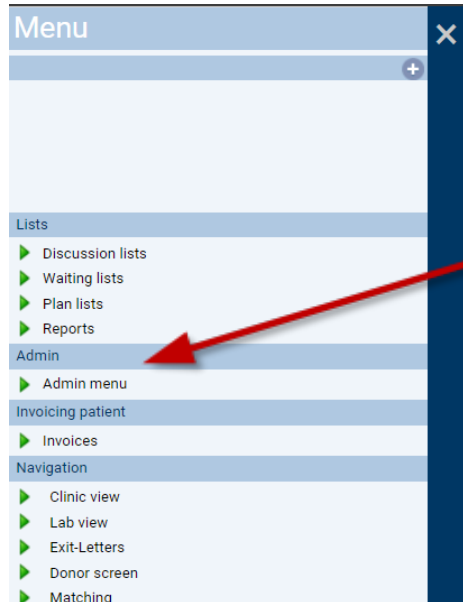


Figure 1: Admin menu access.

After opening the admin menu, several choices are displayed (see screen below). Choose the 'action module' option.

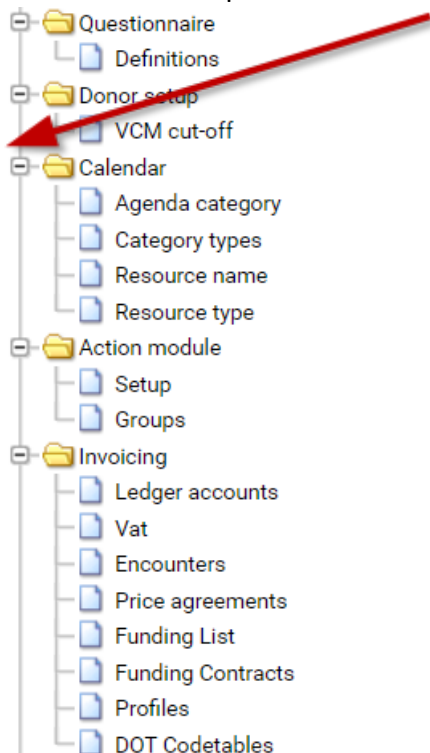


Figure 2: Access action module.

Then choose "groups".

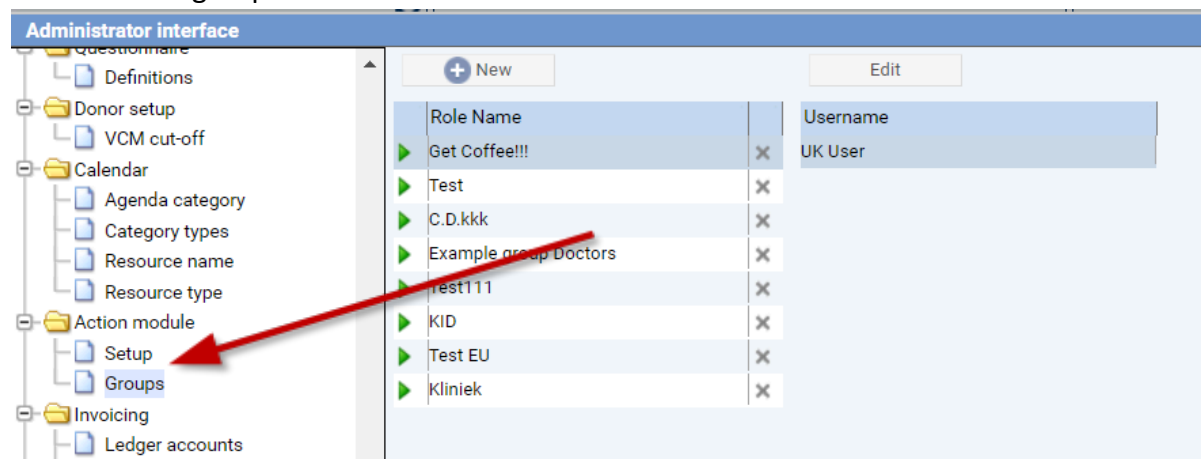


Figure 3: setup action module screen.

New groups can be created from this screen. Click 'new' and give the group a name. Then click 'change' to add an individual user to a group.

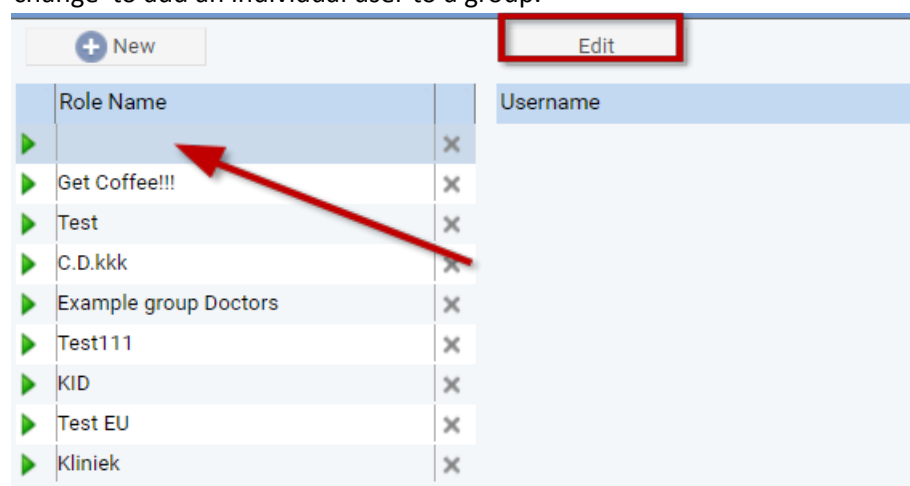


Figure 4: Creating new group.

1.2 Creating Actions

The actions are created from a value list. The administrator can create the value list from the admin menu. Open the admin menu (as described earlier). Click on Maintenance and open 'value lists'. Then click on the green arrow at 'Actionlist-actions' (see example below).

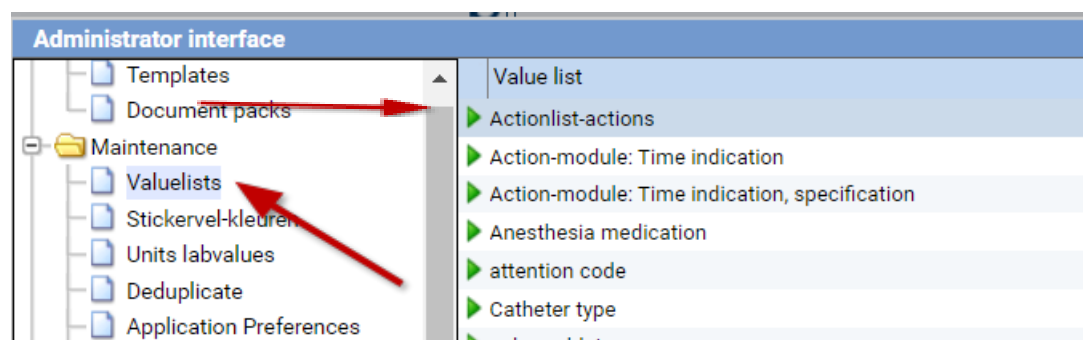


Figure 5: Open value list.

Then the following screen appears. All values are shown in both Dutch (item language NL) and English (item language EN) (hence the double values).

Value list - Actionlist-actions				
Return value	nl	en	Sort Order	Disabled
2		Sign freeze contract	2	<input type="checkbox"/>
1	DBC koppelen	Get coffee	100	<input type="checkbox"/>

Close
+ New

Figure 6: Content value list.

By clicking 'new' a new value list can be created.

Value list - Actionlist-actions				
Return value	nl	en	Sort Order	Disabled
2		Sign freeze contract	2	<input type="checkbox"/>
1	DBC koppelen	Get coffee	100	<input type="checkbox"/>

Close
+ New



Figure 7: Add new value.

The edit valuelist item appears.

Value list - Actionlist-actions				
Return value	nl	en	Sort Order	Disabled
2		Sign freeze contract	2	<input type="checkbox"/>
1	DBC koppelen	Get coffee	100	<input type="checkbox"/>
901			101	<input type="checkbox"/>

edit valuelist item

Warning: changing these values can influence historic records

Return value:

NL:

EN:

Sort Order:

Disabled: ☐

cancel
save

Close
+ New

Figure 8: Adjust newly inserted value.

Clicking on the green arrow opens another screen. Add a description to the value e.g. 'get coffee'. At the input field 'return value' you can indicate which value should be linked to the export.

To ensure uniformity, it is important that the description of the value is used only once. In connection with the safeguarding of history, it is important that no previously assigned value is used when creating the value list again. If this is done, the assigned value will be overwritten.

At the input field 'sort order' you can define at which position the new value should become visible in the list. Finish with 'Save'.

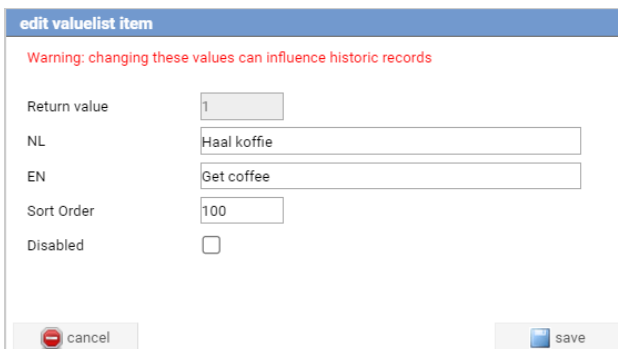


Figure 9: Saving adjustments to the value list.

The value becomes visible in the system by logging out and then logging in again.

1.3 Assigning Actions

In the eBase, actions can be assigned to individuals or groups. An action can be created:

- For a colleague or a general group;
- An action can also be linked to a patient.

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An action can be created by clicking on the action icon at the top right (in the main screen) (see screen below).

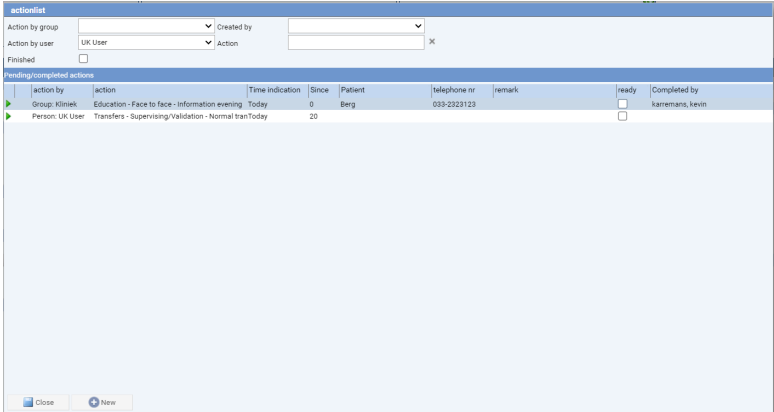


Login: UK User

Log off

Figure 10 : create action item.

The screen below becomes visible. At 'action list' you can select which action points should be visible. The actions are then displayed under 'open action points'.



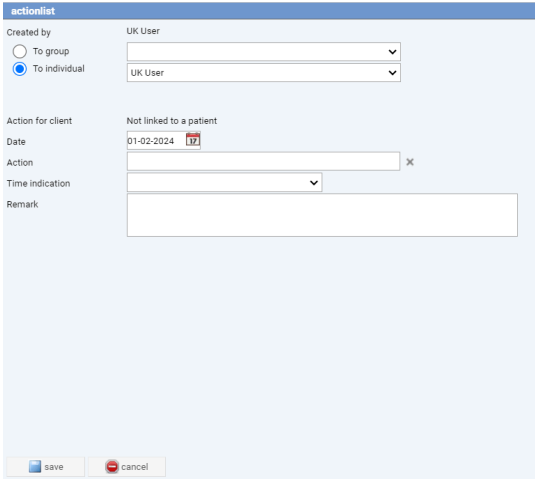
The screenshot shows the 'actionlist' interface. At the top, there are filters for 'Action by group' (set to 'UK User') and 'Created by' (set to 'Action'). Below these is a 'Finished' checkbox. The main section is titled 'Pending/completed actions' and contains a table with the following data:

action by	action	Time indication	Since	Patient	telephone nr	remark	ready	Completed by
Group: Klinek	Education - Face to face - information evening	Today	0	Berg	039-2323123		<input type="checkbox"/>	kanremans, kevin
Person: UK User	Transfers - Supervising/Validation - Normal than Today		20				<input type="checkbox"/>	

At the bottom left, there are 'Close' and 'New' buttons.

Figure 11: Overview of action items.

A new action can be created by choosing the 'new' option (bottom left of the screen). The screen below will be displayed.



The screenshot shows the 'Create new action item' form. It includes the following fields:

- Created by:** 'UK User' (dropdown)
- To:** Radio buttons for 'To group' and 'To individual' (selected). Below 'To individual' is a dropdown for 'UK User'.
- Action for client:** 'Not linked to a patient' (dropdown)
- Date:** '01-02-2024' with a calendar icon.
- Action:** Text input field.
- Time indication:** Dropdown menu.
- Remark:** Large text input area.

At the bottom, there are 'save' and 'cancel' buttons.

Figure 12: Create new action item.

If an action item has been created for a specific user, a red number appears next to the action icon (see Figure 10).

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An action can be linked to a patient from the notes bar. Click the menu selection button and choose the option 'add to action list'.



Figure 13: Add patient action item.

This will create Action for this specifick patient.

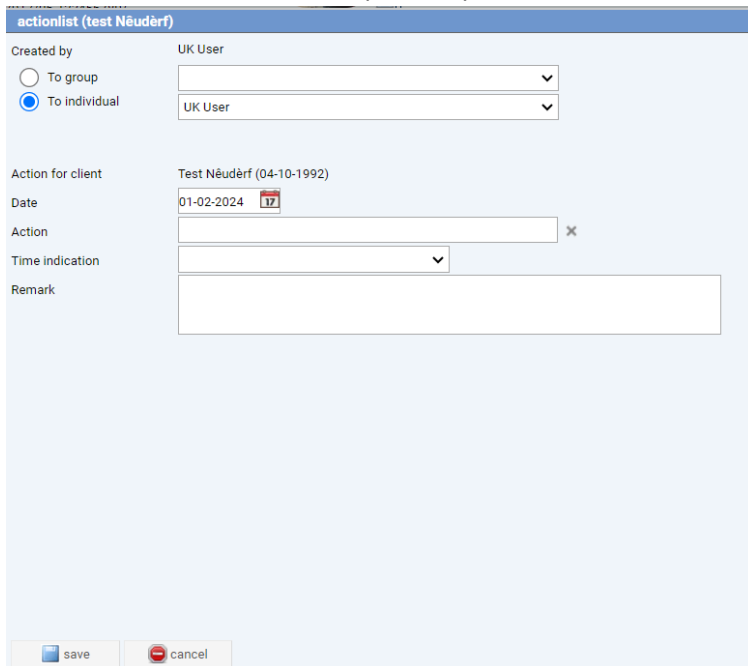
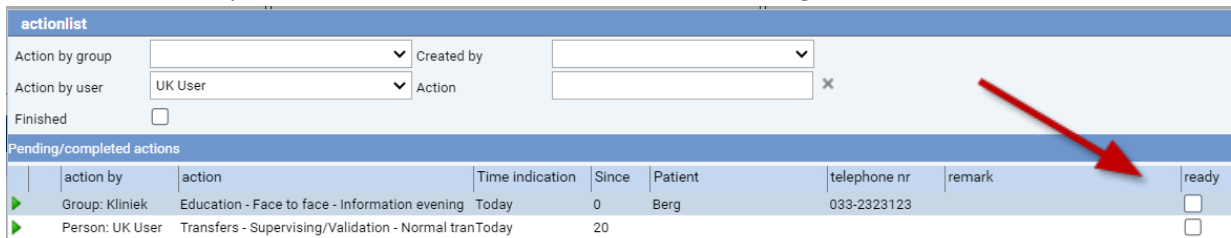


Figure 14: opening action item.

The action item is displayed on the action item list (see Figure 10).

1.4 Finalize outstanding actions.

An action open to the user is shown under 'Open action items'. When an action is completed, a check mark can be placed at 'done'. The action is closed and no longer shown.



actionlist									
Action by group		Created by							
Action by user		UK User		Action					
Finished				<input type="checkbox"/>					
Pending/completed actions									
	action by	action	Time indication	Since	Patient	telephone nr	remark	ready	
▶	Group: Kliniek	Education - Face to face - Information evening	Today	0	Berg	033-2323123		<input type="checkbox"/>	
▶	Person: UK User	Transfers - Supervising/Validation - Normal tran	Today	20				<input type="checkbox"/>	

Figure 15: Handle action.

Click the green arrow to open and edit the action item. The screen below will appear.

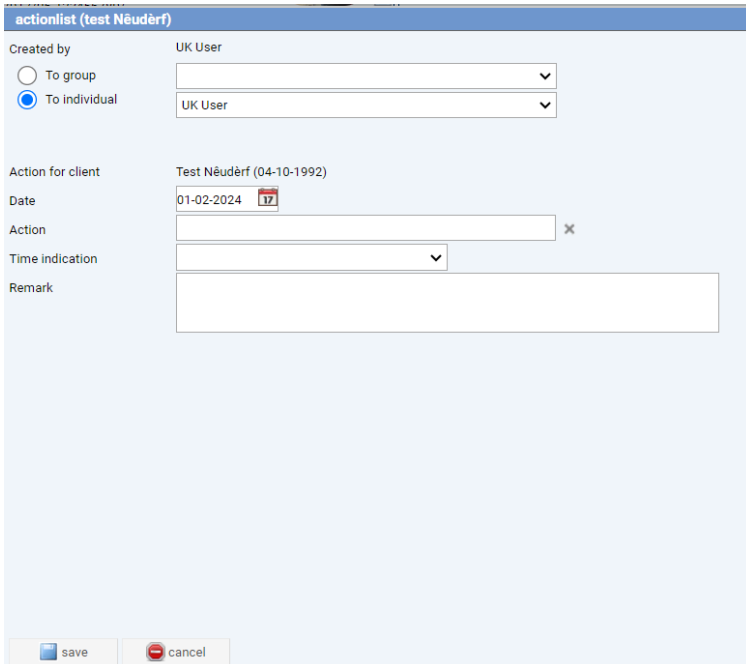
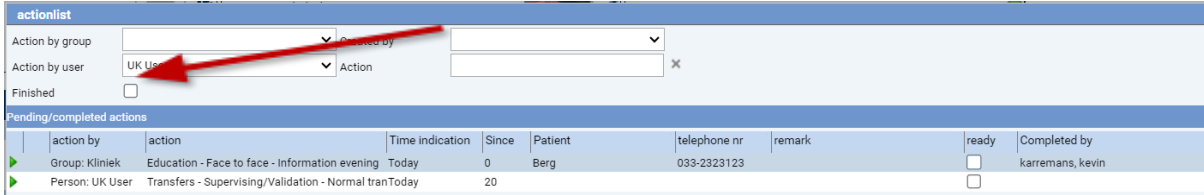


Figure 16 opening action item.

1.5 Summary of finished actions

It is possible to get an overview of the finished actions by placing a check mark at action - completed (see screen below). It is possible to make a specific selection based on group, person, created by and type of action.



action by	action	Time indication	Since	Patient	telephone nr	remark	ready	Completed by
Group: Kliniek	Education - Face to face - Information evening	Today	0	Berg	033-2323123		<input type="checkbox"/>	karremans, kevin
Person: UK User	Transfers - Supervising/Validation - Normal tran	Today	20				<input type="checkbox"/>	

Figure 17: Overview of completed actions.