

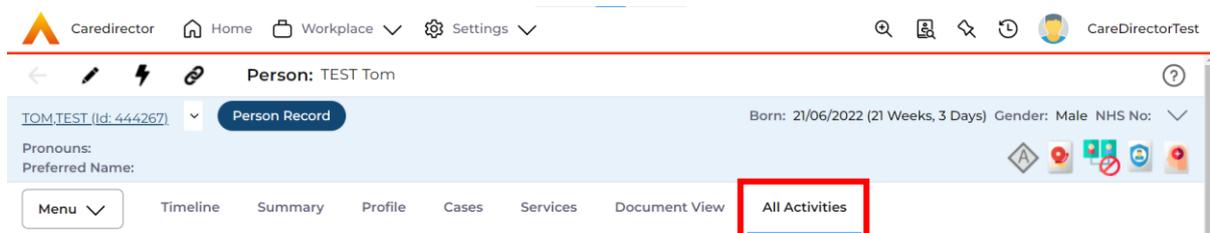


All Activities

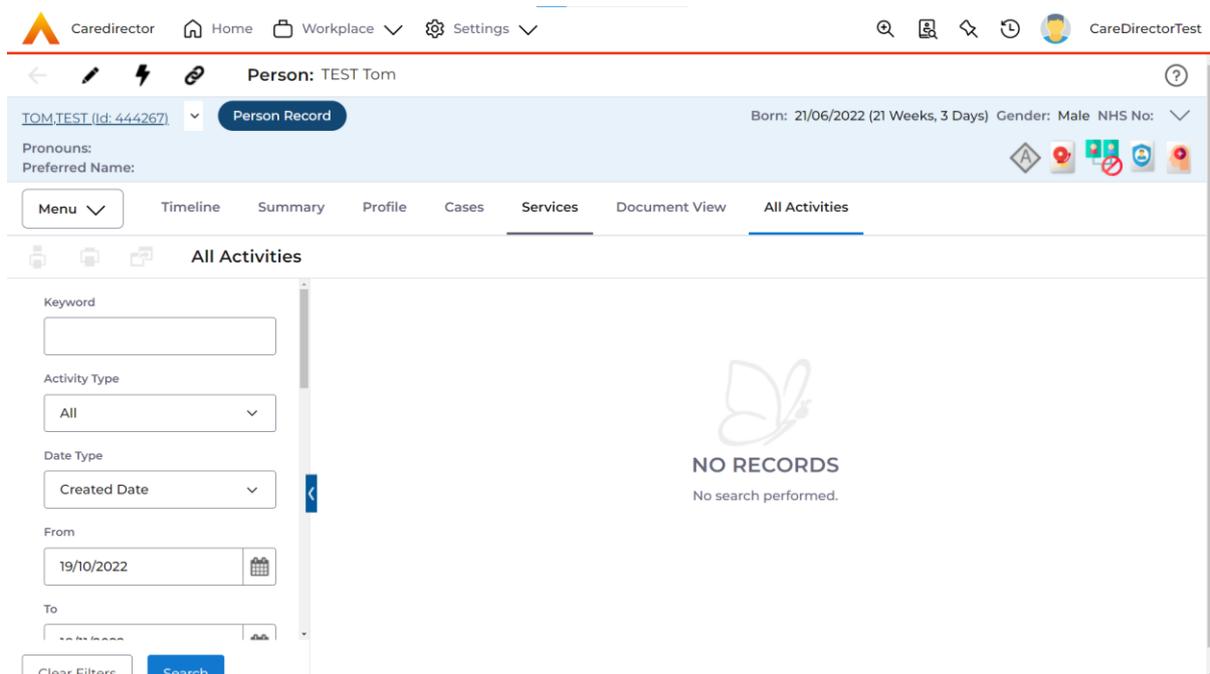
Document	All Activities
Purpose	This is to show all activities linked to a person record
Version	V2
Owner	ICT Business Transformation Team
Last Updated	22/05/2023

All Activities

1. Locate a **Person Record**.
2. **All Activities** show all activities that are linked to that service user regardless which Case or record is it on.
3. **All Activities** is located as a tab on a **Person Record**



4. Once selected, a blank screen will appear.



- To display all activities, select **Clear Filters** then **Search**. This will all filters that can be applied to show **All Activities** linked to this Service User since the person was created.

- This will display all activities, closed, open, scheduled and cancelled on the record for both person activities and case activities.

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case note	Regarding Type	Responsible User	Respo
<input type="checkbox"/>	Tom MullenTest	Case Note for Pe...	Person Case Note	Open	25/05/2022 09:20...	Yes	Person	Scott Simpson	CareDirec
<input type="checkbox"/>	MullenTest, Tom...	Assessment of C...	Case Note (For C...	Open	20/05/2022 10:30...	Yes	Case	Scott Simpson	CareDirec
<input type="checkbox"/>	MullenTest, Tom...	Extra Support	Task	Open		No	Case	Scott Simpson	CareDirec

7. **Regarding:** If you use your mouse to hover over the name will show which record it is found under.

The screenshot shows the CareDirector interface for a person named Tom, TEST. The 'All Activities' tab is selected. A table of activities is displayed with columns: Regarding, Subject, Activity, Status, Start/Due Date, and Actual End. A red box highlights the 'Regarding' column, which contains entries like 'Tom, TEST - (21/0...', 'Tom, TEST - (24/...', and 'TEST Tom'.

Regarding	Subject	Activity	Status	Start/Due Date	Actual End
Tom, TEST - (21/0...	this stuff needs ...	Task	Completed	17/11/2022 00:00:...	
Tom, TEST - (24/...	s - Test Subject	Task	Open	14/11/2022 09:00:...	
Tom, TEST - (21/0...	est subject P&A...	Task	Completed	11/11/2022 14:00:00	
Tom, TEST - (24/...	est	Task	Open	11/11/2022 09:20:00	
TEST Tom	HC Funding D...	Task	Open	10/11/2022 13:09:42	
TEST Tom	HC Funding D...	Task	Open	10/11/2022 13:09:42	
TEST Tom	HC Funding D...	Task	Open	10/11/2022 13:09:42	
TEST Tom	HC Funding D...	Task	Open	10/11/2022 13:09:42	
Tom, TEST - (21/0...	case has been al...	Task	Open	10/11/2022 09:18:50	
Tom, TEST - (21/0...	fsdf	Task	Completed	10/11/2022 00:00:...	

8. To expand the view, select the blue arrow.

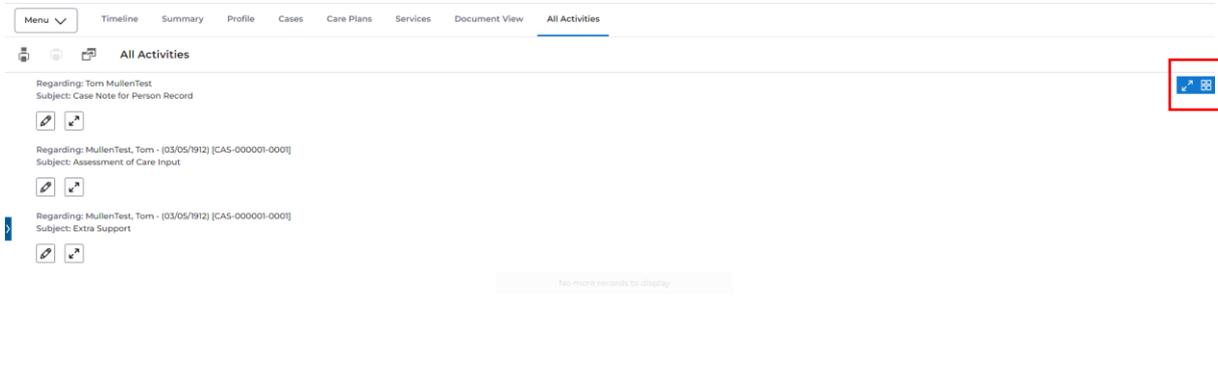
The screenshot shows a detailed view of activities in the CareDirector interface. A table with columns: Regarding, Subject, Activity, Status, Start/Due Date, Actual End, Case note, Regarding Type, Responsible User, Responsible Team, Modified By, and Modified On is displayed. A blue arrow icon is highlighted with a red box.

Regarding	Subject	Activity	Status	Start/Due Date	Actual End	Case note	Regarding Type	Responsible User	Responsible Team	Modified By	Modified On
Tom MullenTest	Case Note for Pe...	Person Case Note	Open	25/05/2022 09:20...		Yes	Person	Scott Simpson	CareDirectorTrain	Scott Simpson	25/05/2022 10:06:...
MullenTest, Tom...	Assessment of C...	Case Note (For C...	Open	20/05/2022 10:30...		Yes	Case	Scott Simpson	CareDirectorTrain	Scott Simpson	20/05/2022 09:39...
MullenTest, Tom...	Extra Support	Task	Open			No	Case	Scott Simpson	CareDirectorTrain	Scott Simpson	20/05/2022 09:4...

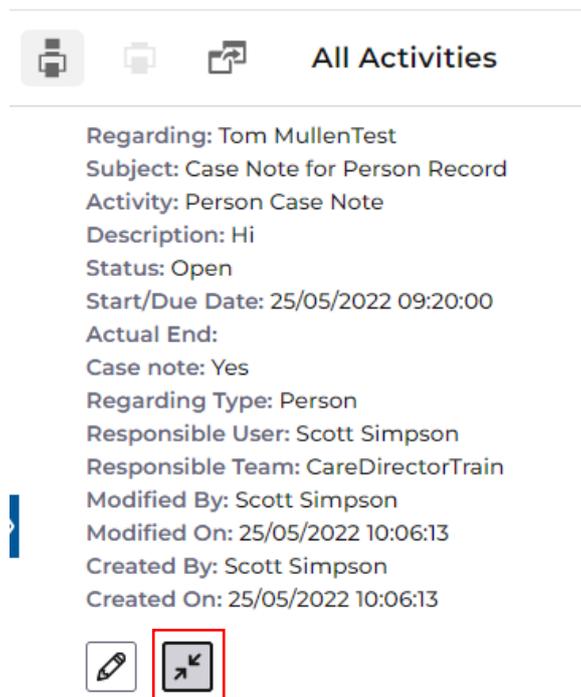


The screenshot shows a pagination bar at the bottom of the page with 'Page 1' and '1 - 3'.

9. To change the view from a list to a grid to display further information, select the blue three lines.



10. Expand these activities by select the two diagonal arrows.



11. To edit the activity, select the pencil icon. This will redirect the page to the edit activity page.



12. To filter the search further, use the columns on the left hand side.

The screenshot shows the CareDirector interface for a person named Tom, TEST. The left sidebar contains filter options: Keyword (text input), Activity Type (dropdown menu set to 'All'), Date Type (dropdown menu set to 'Created Date'), and From/To (calendar pickers). The main area displays a table of activities with columns: Regarding, Subject, Activity, Status, Start/Due Date, and Actual End. The table contains several rows of activity data.

Regarding	Subject	Activity	Status	Start/Due Date	Actual End
Tom, TEST - (21/0...	This stuff needs ...	Task	Completed	17/11/2022 00:00:...	
Tom, TEST - (24/...	ss - Test Subject	Task	Open	14/11/2022 09:00:...	
Tom, TEST - (21/0...	Test subject P&A...	Task	Completed	11/11/2022 14:00:00	
Tom, TEST - (24/...	Test	Task	Open	11/11/2022 09:20:00	
TEST Tom	CHC Funding D...	Task	Open	10/11/2022 13:09:42	
TEST Tom	CHC Funding D...	Task	Open	10/11/2022 13:09:42	
TEST Tom	CHC Funding D...	Task	Open	10/11/2022 13:09:42	
TEST Tom	CHC Funding D...	Task	Open	10/11/2022 13:09:42	
Tom, TEST - (21/0...	Case has been al...	Task	Open	10/11/2022 09:18:50	
Tom, TEST - (21/0...	dfsdf	Task	Completed	10/11/2022 00:00:...	

13. Here will allow you filter the list by **Activity Type/ Date/ Status/ Responsible User and Team.**

The screenshot shows the 'Activity Type' dropdown menu. The menu is open, displaying the following options: All, Appointment, Email, Letter, Phone Call, Task, and Case Note.

From

 
To 
Actual End (From)

Status



- Draft/In Progress/Open
- Completed/Sent
- Cancelled/Failed to Send
- Scheduled/Pending Send

14. If the activity was cloned from elsewhere, ensure the checkbox **Show Cloned Records** is checked.

Profession Type

 
 Show Cloned Records

Version Control

Version	Change	Author	By Date
V1	INITIAL START	SS	18/11/2022
V2	Title change: - "How to find all activities" to "All Activities" Format changes: - Version Control - Remove Version	SS	22/05/2023