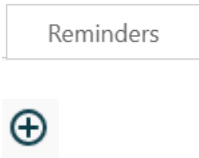



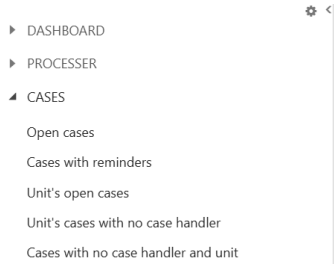
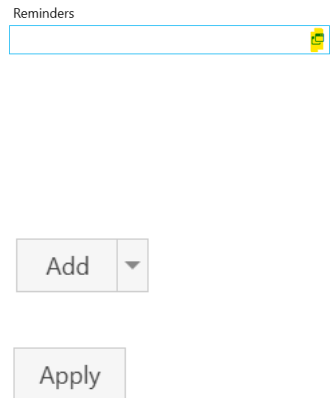


# How to use Reminders

| <p>This guide explains how to use <b>Reminders</b> to support your case management, for example reminders about response deadlines or other due dates.</p> |   |   |
|--|---|---|
| Instruction  | Explanation   | Navigation  |
| <p><b>Find case</b></p>  | <p>Open the case to which you want to attach a reminder.</p>  |   |
| <p><b>Create reminder</b></p>  | <p>Click the <b>Reminders</b> tab and select the <b>Add</b> icon.</p> <p>A dialog box opens. Complete at least the following fields:</p> <ul style="list-style-type: none"> <li>• <b>Date</b> – the date on which you want the reminder</li> <li>• <b>Reminder for</b> – select the person who should receive the reminder</li> <li>• <b>Reminder text</b> – a free-text field where you can describe what needs to be remembered</li> </ul> <p>Finish by clicking <b>Save</b>.</p> <p><b>Tip:</b> You can add multiple reminders to the same case.</p> |    |
| <p><b>Edit reminder</b></p>  | <p>Select the reminder under the <b>Reminders</b> tab.</p> <p>Click <b>Edit</b>.</p> <p>Make changes to the reminder.</p> <p>Click <b>Save</b>.</p>   |  |
| <p><b>Close reminder</b></p>   | <p>Select the reminder under the <b>Reminders</b> tab.</p> <p>Click <b>Edit</b>.</p> <p>Choose <b>Closed</b> in the Reminder closed field.</p> <p>Click <b>Save</b>.</p>  |  |
| <p><b>Delete reminder</b></p>  | <p>Select the reminder under the <b>Reminders</b> tab.</p> <p>Click <b>Delete</b>.</p>  |  |

|                                  |  |   |
|----------------------------------|--|---|
| <p><b>Overview (default)</b></p> | <p>Open the <b>Cases with reminders</b> list in the left navigation pane on the Dashboard.</p> <p>The list shows cases with reminders assigned to you for one week ahead.</p>  |  <p>► DASHBOARD<br/>     ► PROCESSER<br/>     ▲ CASES<br/>     Open cases<br/>     Cases with reminders<br/>     Unit's open cases<br/>     Unit's cases with no case handler<br/>     Cases with no case handler and unit</p> |
| <p><b>Overview (custom)</b></p>  | <p>Create a new case search.</p> <p>Click the pop-up icon to the right of the Reminders field.</p> <p>Enter the desired search parameters.</p> <p>Click <b>Add</b> and then <b>Apply</b>.</p> <p>For example, to search for all your reminders for the next 20 days:</p> <p><b>Reminder for</b> = @Me</p> <p><b>Reminder date</b> = +20d</p> <p>Save the search and add it to your Dashboard (see the Danish guide <i>Opret og tilpas dashboards</i>).</p> <p><b>Tip:</b> When a reminder date is overdue, the date will appear in red on your list.</p> |  <p>Reminders</p> <p>Add ▼</p> <p>Apply</p>   |