Did you know you that with the August 2018 release of SmartAdvocate we have added (or enhanced) several Mass Update features? Take the Tasks Dashboard for example – now you can conveniently mark all open tasks cancelled right from the dashboard!

To do so, go to Dashboards, select Tasks and make the Case Status column visible if it is not already displayed (i.e., click on the Show/Hide Columns tab in the bottom right corner of your screen, 'drag' the Case Status column out of the Column Chooser box up to the area where the displayed columns are listed). Run a search for Open tasks. To narrow your search, you may want to select appropriate filters such as a narrower date range or specific Requestor. Your search results can be further narrowed, if necessary, by filtering in one of the columns such as by subject, case type or description. Optionally, you may want to split up your searches prior to actually modifying the tasks to reduce processing time - especially if you have many cases or many tasks involved. Enter 'closed cases' (without the quotes) in the Case Status column to filter Closed Cases only. This will give you a list of the open tasks in closed cases.

In the August 2018 release of SmartAdvocate, you can then select multiple (or all) of the displayed tasks (checkbox in the far-left column) and cancel them all at once by right-clicking on one of the tasks and selecting 'Mark Selected Cancelled.' If you are using a version of SmartAdvocate prior to the August 2018 release, you will need to cancel the tasks one-by-one by right-clicking the task, editing it, and changing its status to Cancelled.

By the way, bear in mind that, by default, your 'MySmartAdvocate' panels display information for open cases only (e.g., Critical Deadlines, Tasks, etc.). You can choose to have information for closed cases displayed by checking the appropriate box in filters for each respective panel.

Mass Update (or Mass Action) is available from results generated in Case Browse (generate text message to all your clients), Contact Search (merge duplicate contacts) and the Medical Records Requests Dashboards (print all pending medical records requests) to name a few.