

DOCMAN 75000

SAVE TIME WITH
THE GPSoC RELEASE
OF DOCMAN

DISCOVER HIGHLIGHTS BROUGHT TO YOU WITH
NEWER RELEASES OF DOCMAN...



docmangp

www.docmanhelp.com

INTRODUCTION

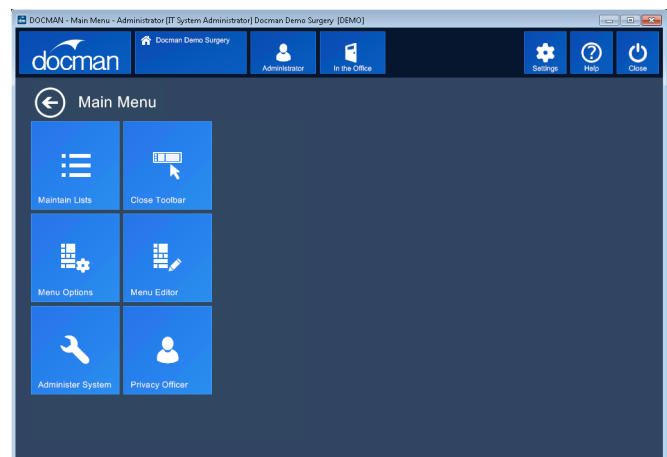
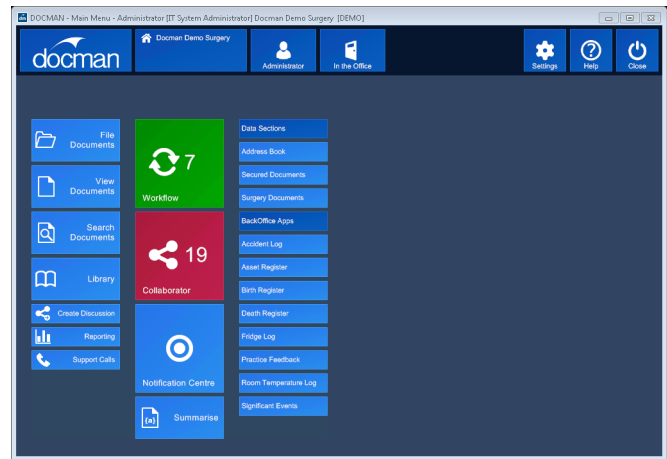
The GPSoC Framework will centrally fund all of the Docman GP annual software licences and ongoing support for GP Practices in England. This includes existing Docman customers and also any new Practice who want to enjoy the advantages of the market leading document, workflow and practice management solution. GPSoC allows practices and CCGs to benefit from a range of quality GP clinical IT systems from existing suppliers.

The latest version of Docman GP includes innovative action based workflow (iWorkflow) ensuring Practices' workflow processes are streamlined and efficient.

The advanced clinical content recognition engine (Intellisense) automatically detects patient details, significantly improving summarising as well as the speed and data quality of filing into the patient's clinical record.

In addition, Docman GP provides a comprehensive suite of applications to support core practice management activities (BackOffice) and a new collaboration platform to support both clinical and administrative discussions (Collaborator).

Docman are pleased to announce the release of version 75000. Bringing you an important update including the new Single Sign-on for EMIS Web and INPS and many more new additions. To compliment this release, we would like to show you what has been happening since the release of Docman 71260, highlighting beneficial new features to enhance your Document Management experience.



Guidance on updating Docman is available at www.docmanhelp.com

PRODUCT HIGHLIGHTS

71260 ONE CLICK WORKFLOW

The release of Docman 71260 brought you some new benefits and additions to make your daily workload easier and much quicker.



iWorkflow is the very latest in next-generation electronic document workflow. It incorporates intelligent routing based on assigned actions which streamline the creation and processing of workflows. iWorkflow provides practices with huge measurable efficiencies and frees up valuable time for healthcare professionals and administrative staff.

Within iWorkflow if a workflow is locked by another user, the activity pane now includes a link to forcibly unlock it.

Workflow views can now be configured to show a user group as part of the 'sent to' filter. This allows users that are part of multiple groups to differentiate between letters that arrive for that user based on the group it was intended for.

Docman Hub profiles can be configured with multiple NACS codes for practices who share one clinical system but are separate organisations. This is configurable in full system preferences by the support team.

With version 71260, all Docman users were encouraged to enable SmartUI as all screens in Docman were replaced by SmartUI versions. The old workflow and summariser screens were removed from Docman and at this point, the switch over was automatic.

71262 VALUE READ CODES

The release of Docman 71262 brought you the latest generation of Intellisense, designed to enhance the intelligent filing and coding solution used by many of its 6,000 practices.

As well as a brand new summarising interface designed to make coding even easier, the enhancements include the ability to detect value Read Codes and correctly file them into the clinical system, creating further automation in the process.



71263 FAST ANNOTATION

The release of Docman 71263 saw a few changes made to Workflow designed to make the annotation process more efficient. Key features in this release included:

Workflow now allows the same stamp/highlight to be maintained throughout the cycling of each page in a multi-page tif.

Workflow now also allows the user the option to undo their last annotation whilst keeping the annotation type selected.

71265 STREAMLINE NON PATIENT DOCUMENTS

This release added significant functionality to Docman. Library now forms an integral part of Docman and is free to all users.

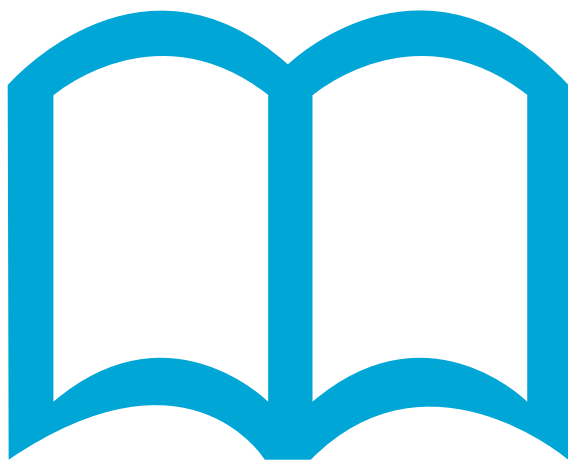
Library enables practices to efficiently store, workflow and retrieve all non-patient documents to support the practice.

Utilising an intuitive interface, the solution provides a range of useful features for categorising and tagging information, including web references, which can then quickly be retrieved using a modern context sensitive searching tool working across tags, file names and document content.

Existing non-patient 'sections' can be migrated to library. Documents stored in a simple directory structure can also be imported giving users who previously managed all non-patient documents on a windows server an instant secure and searchable repository.

Auto patching allows small patches to be downloaded and installed automatically rather than requiring user intervention.

Auto-generated quicksteps mean that GP users who have not yet created any quicksteps in iWorkflow will now see three new quicksteps: No action required, Not my patient, Readcode Highlighted thus saving staff time through the reduction in mouse clicks when performing common processes.



71266 AUTO-MATCHING FILING FIELDS

The release of 71266 brought you a few enhancements made to Docman Hub, printing and Scheduler, designed to make your document transfer and filing experience quicker and easier. Key features in this release included:

A document sent from Docman Hub contains meta-data to pre-populate the filing fields to provide quicker document filing. Documents arriving via a Docman Hub with metadata that matches an existing filed document were not previously flagged up as possible duplicates. A warning message will now appear letting the user know that a document with the same metadata already exists.

A new print option has been included that allows you to include or exclude the printing of annotations on TIFF format files.

The scheduler has been updated to allow for the conversion of Excel files with the extensions xls and xlsx to TIFF format. You will need to have Excel installed on the same server as the scheduler for this facility to work.

In addition to this, you will also be able to convert image files with a jpg file extension to TIFF format. You will need to have Microsoft Fax and Image Viewer installed on the same server as the scheduler for this to work.

The Docman Scheduler can now collect using multiple NACS codes for web based collections (eg Medisec). Previously this functionality was only available for collections from a Docman Hub.

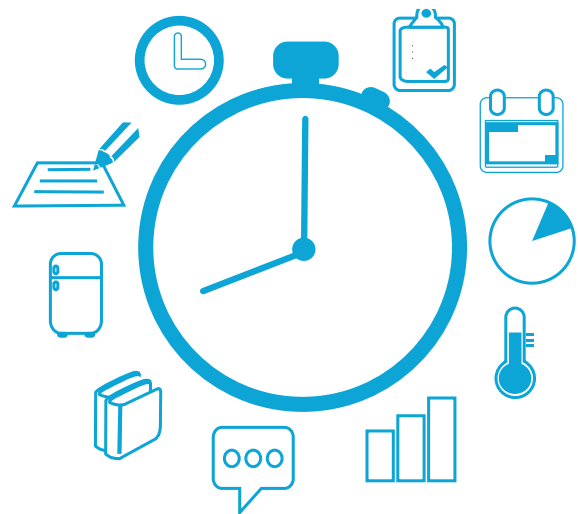
71270 BACKOFFICE APPLICATIONS

71270 brought you the new Docman BackOffice Apps, which provides a safe and secure place for you to record accident reports, assets, births, deaths, fridge and room temperature logs, practice feedback and significant events.

This release also brought some general changes to the menu. The Active Workflows option has been removed and the number of active workflows has been added as a count to the Workflow In tray.

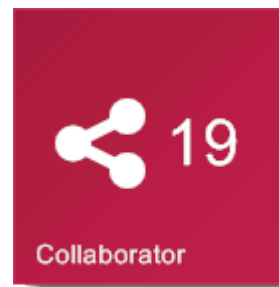
The new and improved update facilities for administrators will make the application of updates less of a chore with the ability to apply all updates in one session rather than having to apply them individually.

When applying updates to Docman 7 administrators now have the option to force logged in users out and then apply the updates.



71275 AUDITED DISCUSSIONS

The release of Docman 71275 brought you the new Docman Collaborator, which allows you to instigate and participate in forum style discussions with your colleagues. Docman Collaborator is an activatable add-on module that brings full discussion capability to the Discuss tabs in Library and some Back Office Applications.



Collaborator will deliver efficiencies by allowing colleagues to hold audited discussions without the need to co-ordinate meetings or phone calls.

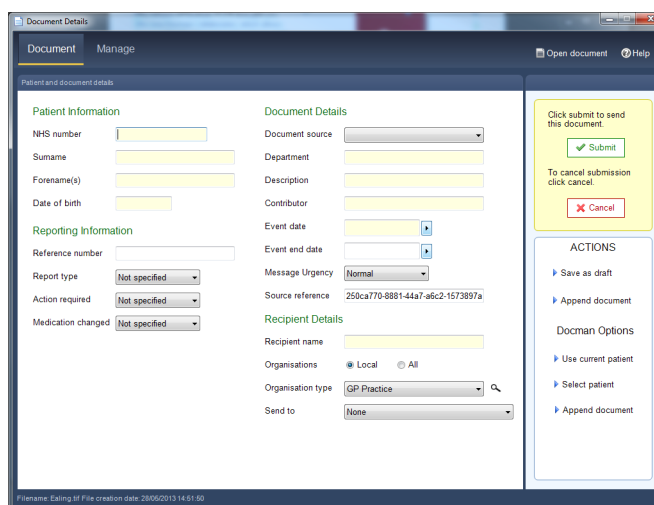
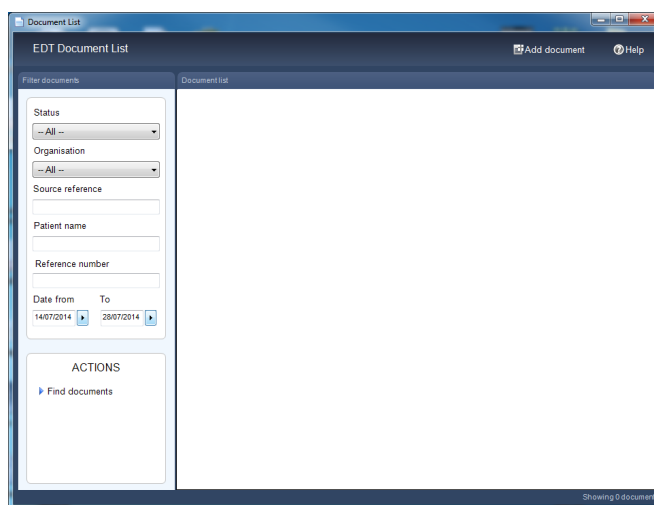
71275 also brought Document Capture integration with Docman.

Document Capture is a utility that allows you to send documents to another organisation via a Docman Hub. Integration with Docman will improve efficiency and decrease costs by providing you with two-way communications.

Documents can arrive at their intended destination in seconds rather than taking a couple of days by post.

Enhancements in other areas included an update made to the Status Bar in EMIS Web. The number of queued documents is now displayed in the status bar, if the document has not been filed after the maximum attempts this text will change to red to indicate that there is a problem.

A new feature was also included that allows the Finish button in iWorkflow to be turned off. The new feature, suggested by King's College, is for organisations that have created quickstep actions containing a Finish button. Removal of the Finish button from the intray forces people to add an action, rather than just comment and click Finish.



71280 INTUITIVE INTERFACE

Docman version 71280 brought you a new login screen and menu design that has a more modern look with a simpler interface providing a more intuitive environment. The new menu system makes use of colour and user defined layout to give you access to what is important for your work.

Grouping of features into sub menu screens allows users to focus on the functions they need to access.

By grouping tiles into sub menus, we have reduced the number of functions that need to display on the Main Menu, making better use of screen space and making the screens easier to read.

Live Tiles automatically update. The live tiles display the number of unread items and turn green where items are normal priority or red where you have high priority items.

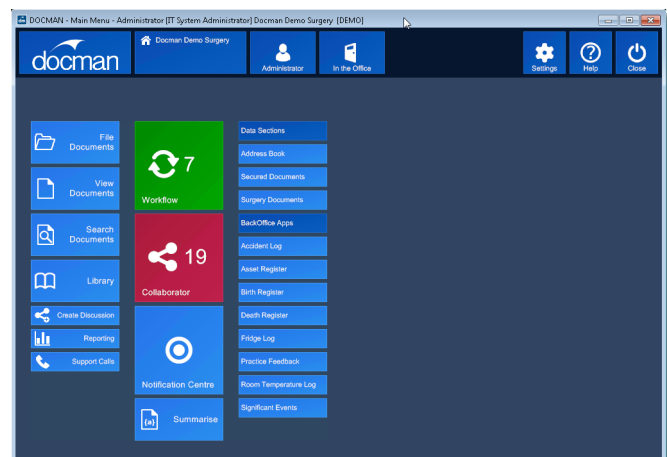
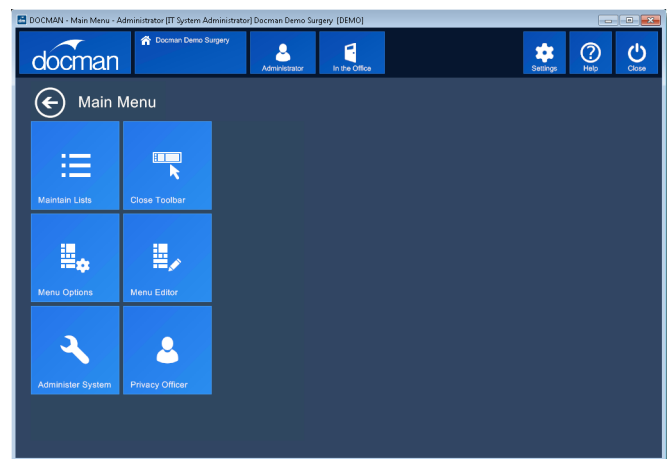
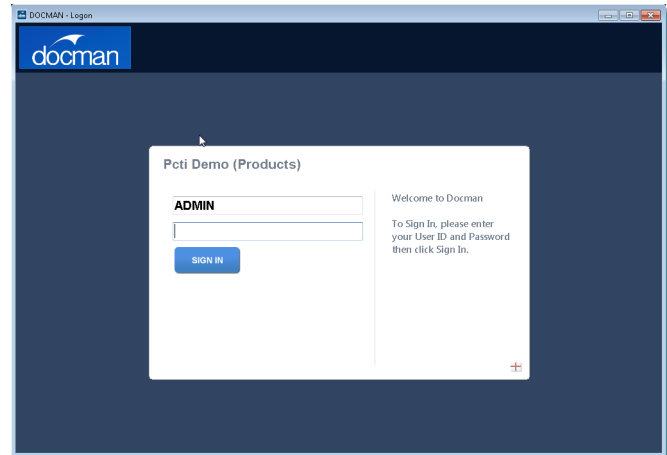
Organisation and system information displays at the top of the screen. On the left, you have the Organisation Name and the Name of the person currently logged in.

You also have the Out of Office button so you can easily switch your status.

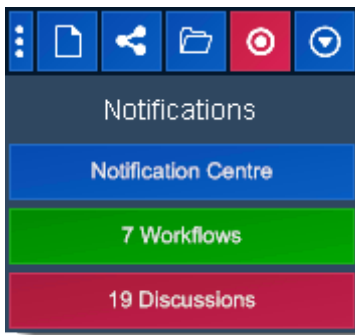
The colours of the Organisation and In/Out of Office tile will change if there is any change in status.

The new toolbar design fully compliments the main menu screen. The new-look tiles are incorporated into the toolbar with drop-down menus that are a lot easier to read on the screen.

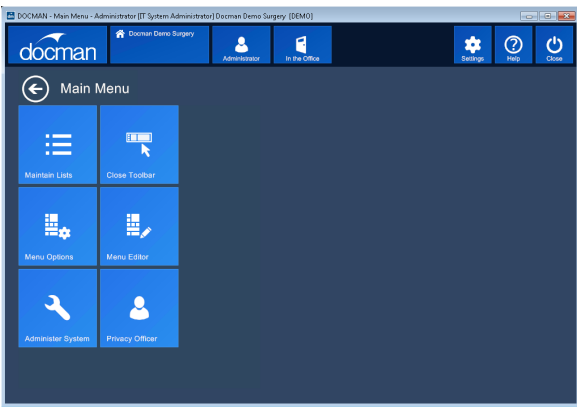
Lives tiles repeat on the toolbar notification menu. Like the main menu these tiles change colour to red (indicating there are high priority unread items), the number displaying on the tile denotes the number of unread items regardless of their priority.



Like the live tiles on the main menu, the toolbar live tiles will change to blue once you have read all the unread items.



The new Settings Menu will give you quick and easy access to features such as Maintain Lists, Menu Options and Administer System.



When accessing the administration module from the new settings menu, the user authenticates automatically so there is no need to log in again.

The new Menu Editor allows users to create their own personalised menu screens.

When the user clicks on the Close tile, they will see a dialog box that allows them to Exit, send Docman to the tray or Switch User.

Exit logs the user out and closes Docman. Tray leaves the user logged in and sends Docman to the System Tray. Switch User logs the user out and leaves a Docman Login screen open ready for the next user to log in.

You can also specify whether you want to be asked every time or not.

Intellisense Summariser enhancements will drive efficiency and productivity, reducing time taken to summarise documents and freeing up resources for other tasks.

As Read Codes are summarised, the usage is recorded as the keywords are matched. The usage record and the keyword matching, assists in ranking Read Codes.

We have included a visual indication of Read Code usage. The indicator is a number 1,2 or 3 displayed in a coloured roundel, a colour is applied to indicate the ranking with a 1 in a green roundel, 2 in an amber roundel and 3 in a red roundel.

When summarising a document you can now change the font and font size by clicking on the Manage Tab and selecting the OCR text font from the Options section.

An enhancement has been made to the tagging facility within Collaborator, where you can now choose to either make a tag public for all users to use or Private for your own personal use.

When a document is tagged and it is public, it will be presented to the user in green, if it is a private tag, it will be presented in blue to the creator only.

A change has been made to the Park discussion facility within Collaborator, where granted a user has full access rather than Readonly, they have the ability to Park a discussion for all participants, eliminating the need for all users to Park a discussion individually.

A user cannot reactivate a discussion for all users, they can only reactivate for themselves.

We have added the option to change the priority of a Workflow in Quick Steps.

Filtering capability has been added to iWorkflow. This provides the user with a dropdown menu of options by which they can filter their workflows.

A number of screen dialogues have had check boxes replaced with new style switch buttons.

The new switch buttons offer users a clear Yes or No indication for each option. This is particularly evident in the User security settings.

Single Sign on for EMIS Web determines which user is logged into the clinical system and automatically logs this user into Docman. If the current user chooses to log out of EMIS Web they will be prompted by Docman to switch user.



Single Sign on for INPS determines which user is logged into the Vision clinical system and automatically logs this user into Docman. If the current user chooses to log out of vision, they will be prompted by Docman to switch user. This feature relies on dlm 450.

We have changed the Document Viewer so that when in Select Mode you can multi select documents in the list view.

The user could order the documents by date and shift click to select the date range they want. Hitting the space bar will then check the highlighted documents meaning the documents will be selected when the user prints.

We have introduced the ability to alert users if server space drops below a certain level. The user will be notified via a system notification in Docman.

When deleting a document we have added the ability to add a reason as to why the document is being deleted. This will be useful for audit purposes.

Users also have the ability to delete multiple documents at once but they will need to be for the same reason.

The ability for users to select a specific amount of workflows when bulk re-routing rather than doing them all at once or doing them one at a time has now been included. This facility now appears in the form of a ticking list.

Users now have the ability to search within the content of the document rather than just the Meta Data. The ability to exclude terms during a search has also been added, this is done by surrounding a word within square brackets.

When a document has been annotated in both standard and iWorkflow, a new revision for the document will be automatically created. All annotations to the document will be made to a temporary copy and an audit trail of the revision will be written containing the workflow ID and active route ID.

Workflow templates can now support a 'due date' option. This is stored as a number and is the number of days until the workflow is due.

When a workflow is created the due date will be automatically populated based on the due date setting of the selected workflow template. If no template is selected, or the template does not have one, then no due date is assigned.

Assigning a due date to a workflow is not mandatory.

As the workflow routing form now features a Date Textbox that contains the due date, the ability to amend the due date has also been introduced.

The due date can be changed when in the workflow screen by pressing F6 on the keyboard.

All changes to the due date will be audited.



Reporting has now been integrated into Docman and is accessible through the Reporting menu. Report Runner follows the same permissions as Docman Reports, in that it is only available when you have permissions to reports.

The User Settings now includes the option to designate a user as Privacy Officer. The new GPSoC requirements state that there must be at least one user with this role type at all times.

When a document has been deleted from Docman, a notification will be created and sent to the Privacy Officer. The links on the notification will open the patient section where the deleted document was once linked.

Support for the black and white list has been introduced. The functionality of the white/black list is as follows: If a file extension is on the black list, it is not allowed to be filed into Docman. If the extension is on the white list, this is then allowed to be filed. If the extension is on both lists, then the black list will take precedence over the white list. If it is on neither list, then the user will be prompted for confirmation of filing an unsupported document type.

An enhancement has been made in Summarising, where when a user has found or selected a term, any preferred term will be highlighted to the user in blue text.

A refinement has been made where, wherever an NHS Number is displayed within Docman or is written out of Docman, it will now be in a '3 3 4' format e.g. 123 456 7890.

Upon selection of a document that has been assigned a revision in either Client Viewer, Standard Workflow In tray or iWorkflow In tray a 'Document Revised' label will appear on the top right hand side of the document viewer. Clicking the label will make it disappear.

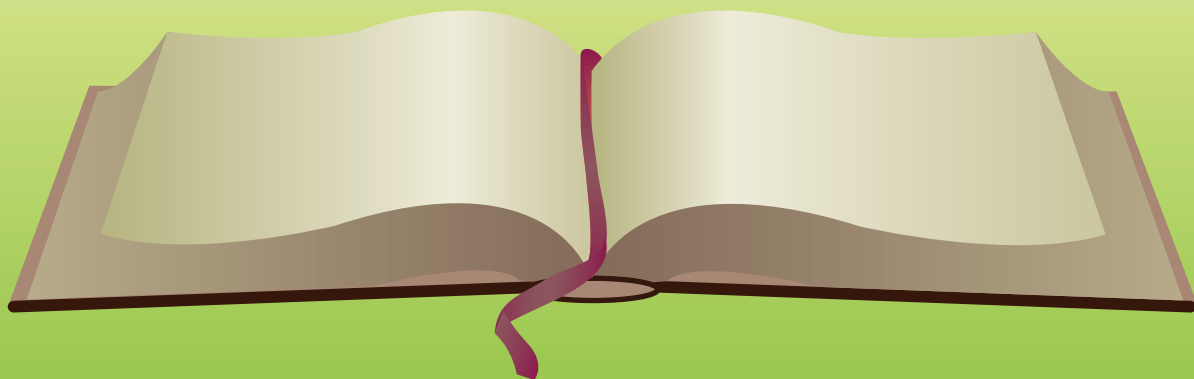
When in Docman, the user will now be informed if a task assigned to them is overdue. If the user has an overdue workflow, this will then make the workflow tile on the main menu red just like when a workflow is urgent. An overdue workflow is classified as such when the due date has passed.

Documents will now automatically be re-directed to a pre-determined individual or group. The change of route will be audited.

Whenever patient related information is accessed, for example: displayed on screen, printed or downloaded, within Docman this will be recorded and auditable and also audit the full name, user role and user ID.

VISIT OUR HELP CENTRE

www.docmanhelp.com



docman
delivering paper free care