Docman 10
ICP.2020.R3.125
External Release Notes

Report created at: 15/07/2020 **Updated:** 26/01/2021

Notes / Special Instructions:

This release contains the following items:

JIRA ID	ServiceNow Ref	Area	Type	Title	Description
D10-3449	N/A	N/A	Feature	Document Collection from Windows folder	A User can choose a particular Windows folder that they want documents to be automatically collected from and can select a specific Docman filing folder to send them to. By default, no folder will be set. This will need to be configured by the user upon first time use in the Desktop App Settings. A User can specify which file types should be collected using a simple textbox. A document collection will take place whenever documents are available in the specified Windows folder. Documents that are added whilst the Desktop App is not running will be collected upon start-up of the app. To safeguard against the failure of a document collection, a check will made to collect anything that is not collected straight away, every hour. For Users with access to multiple Practices or Organisations, the same Collections Folder should not be configured to post documents to multiple sites as the Desktop App will not know the intended site for the documents to be posted to. Once documents have been collected, they will automatically be deleted from the collection folder. If a document is locked, a mechanism will keep checking to see if the document is available and once it's lock is released the document will then become available to import in to Docman. Only one Windows folder can be configured per Desktop App and the same Windows

					folder should not be configured to more than one instance of the Desktop App to avoid duplicates of documents being collected. Please contact the Service Desk if experiencing any errors.
D10-3678	N/A	RMS	Feature	Mapping list for inbound e-RS referrals in Settings	Docman System Administrators now have an optional setting to determine which filing folder e-RS referrals from different services are sent to so that referrals end up in the correct place. A “Mapping List” option in Settings will allow Users to add a DoS ID (Service) and map it to a specific folder. Users can also delete or replace the mapping between DoS ID (Service) and the destination folder should they need to. Each e-RS Service can only be mapped to one folder.
D10-3679	N/A	RMS	Feature	Conflict alert when deleting folders mapped to a DoS ID	A restriction has been put in place so that folders cannot be deleted if they are already mapped to a Service without first taking action. If a User wishes to delete a folder they will be presented with a warning message advising them to first delete the folder mapping. This is a safety mechanism to ensure that e-RS referrals do not go accidentally missing or fail to import.
D10-3364	N/A	GP	Feature	Add Resource Centre to the Navigation Bar	A Resource Centre button has been added to the Docman 10 Navigation Bar to provide Users with easy access to helpful resources and user guides.
D10-3650	N/A	RMS	Feature	Use of patient reference for auto-filing	A new feature has been added for non-NHS RMS customers, which supports the auto-filing of documents using a patient reference, in cases where the national identifier is not available. This supports existing capture sources of EDT Hub (2) and Connect (100).
D10-3737	INC065013	RMS	Feature	Ability to set an existing task view as the “Pending Information Folder”	A Docman System Administrator can set a specific Task View as a “Pending Information Folder” for referral tasks that are awaiting additional information. Only one task view can be marked as the “Pending Information Folder” and only existing Task View’s can be selected. If a user attempts to delete the Task View which is currently set as the “Pending Information Folder”, a warning message will be displayed advising to them to change the “Pending Information Folder” to none or a different Task View. When changing the Task View inbox that the Pending Information Folder has been assigned to, please note that this will not move documents from one Task View to another.

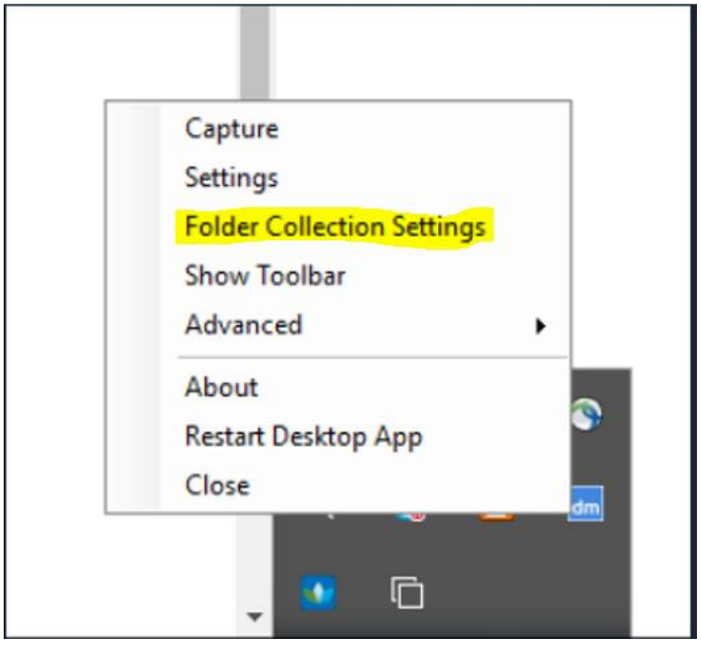
D10-3815	INC0650123	RMS	Feature	Highlight any documents being filed to patients with related tasks in the “Pending Information” task view	If a User attempts to file a document to a patient that has related tasks in the “Pending Information Folder”, a notification will be triggered displaying the list of related tasks. If a user selects this related task it will open in a new tab, allowing them to easily move between the task and the new document being filed.
D10-3787	N/A	GP/RMS	Feature	Ability to restore deleted documents	A new feature has been a created allowing Users to restore deleted documents. By default this feature has been assigned to the role of Privacy Officer. The User must provide a reason for reinstating the document and this action will be audited.
D10-3185	N/A	GP/RMS	Defect	Using the forward button removes the category	When a document is forwarded to another User or a Group using More actions, the forward function removes the category that has been applied by the sender. This issue has now been resolved so that the recipient no longer has to manually re-apply it themselves.
D10-1643	DFCT0011268	GP	Defect	Retain signal connection on Sign out with DTA	When in multi-port mode, if a User signs out of the Docman 10 application it disconnects from the Desktop App. This means that when a user signs back in they will no longer be able to scan or file. This issue has now been resolved.
D10-1707	DFCT0011274	GP	Defect	If the Full name in a User profile contains a double space, User can’t change password	When the full name in the User profile contains a double space a password cannot be updated when it expires. This issue has now been resolved so that a User profile with a double space in the full name can set and update their password.
D10-3000	DFCT0011389	GP/RMS	Defect	Image conversion issue	When a .PDF document is captured in to Docman and converted to tif to allow annotations to be done, red text is being converted into white text rendering it invisible on the document. This issue has been resolved so that the red text is now converted to black so that it will be visible to the user.
D10-3007	DFCT0011420	GP/RMS	Defect	Discrepancies when Task-based Filing is enabled and a folder is deleted	When Task-based Filing is enabled it is possible to delete a parent folder with a child folder inside it without the child folder actually being deleted. The orphaned folder is visible in Tasked based Filing but not then disappears when it is switched off. If there is any documents inside this child folder it will not be possible to see or file these documents without task based filing turned on. This issue has now been resolved.

D10-3141	DFCT0011449	GP	Defect	Issue attempting to view Group Members under Settings	When creating a review or updating a task template, if you pick a group from the selection list and click on the green 'G', it should display a list of the members in that group. However, this does not happen and instead the user is redirected to an error page. This has now been resolved so that clicking the green ‘G’ will now display the list of the members in that group.
D10-3184	DCFT0011327	GP	Defect	Documents incorrectly marked as still under review	Documents that have completed tasks against them are still being marked as under review. If a User attempts to delete that document they will not be able to do so. This issue has now been resolved so that once all associated tasks against the document have been completed it will no longer show as under review and the document can be deleted.
D10-2999	DFCT0011354	GP/RMS	Defect	Unable to make User inactive when linked to an inactive back office app item	If access to a back office item is restricted to only one User and then deleted, the User cannot be made inactive. This conflict has now been removed so that a can now be made inactive in such scenarios.
D10-3001	DFCT0011398	GP/RMS	Defect	Long Snomed Codes do not display correctly on Filing Screen	If Intellisense detects a code that is more than 72 characters in length, the start of the code is cut off by the document preview screen when displayed. Panels have now been resized so that this is no longer happens**.**
D10-3140	DFCT0011425	GP	Defect	Intellisense error when filing documents from a specific sender	When attempting to file some scanned documents and documents from NHS Mail from a specific sender, an error message is displayed stating that “Intellisense is unavailable at the moment, please contact support.” This issue has now been resolved.
DRM-4	DFCT0011434	RMS	Defect	When selecting a Quick Step the ability to search a task has disappeared.	When selecting a Quick Step which has multiple tasks to choose from, the search bar at the top of the list of task options disappeared. A fix has now been implemented so that the search bar is present.

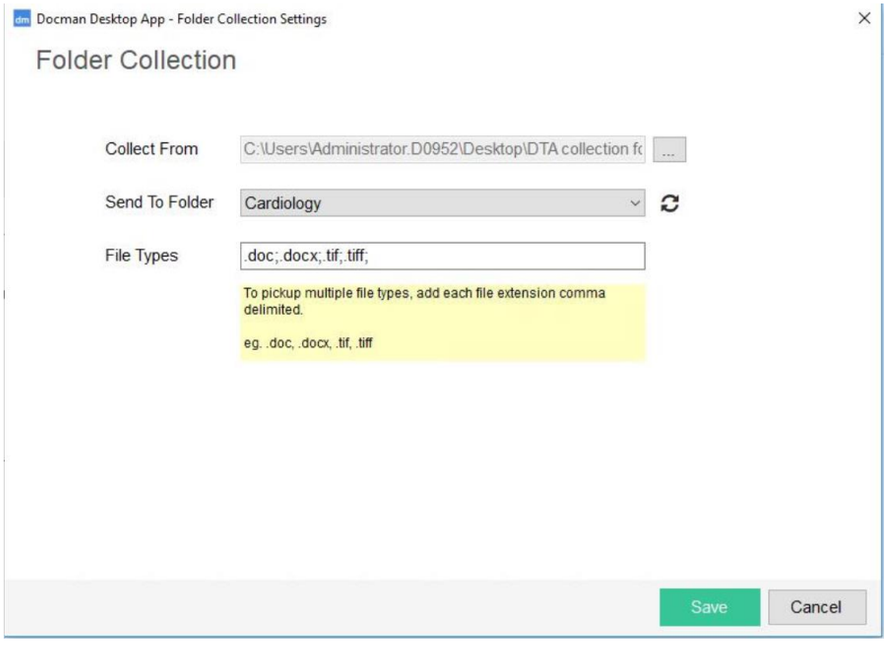
Screenshots

D10-3449 Document Collection from Windows Folder

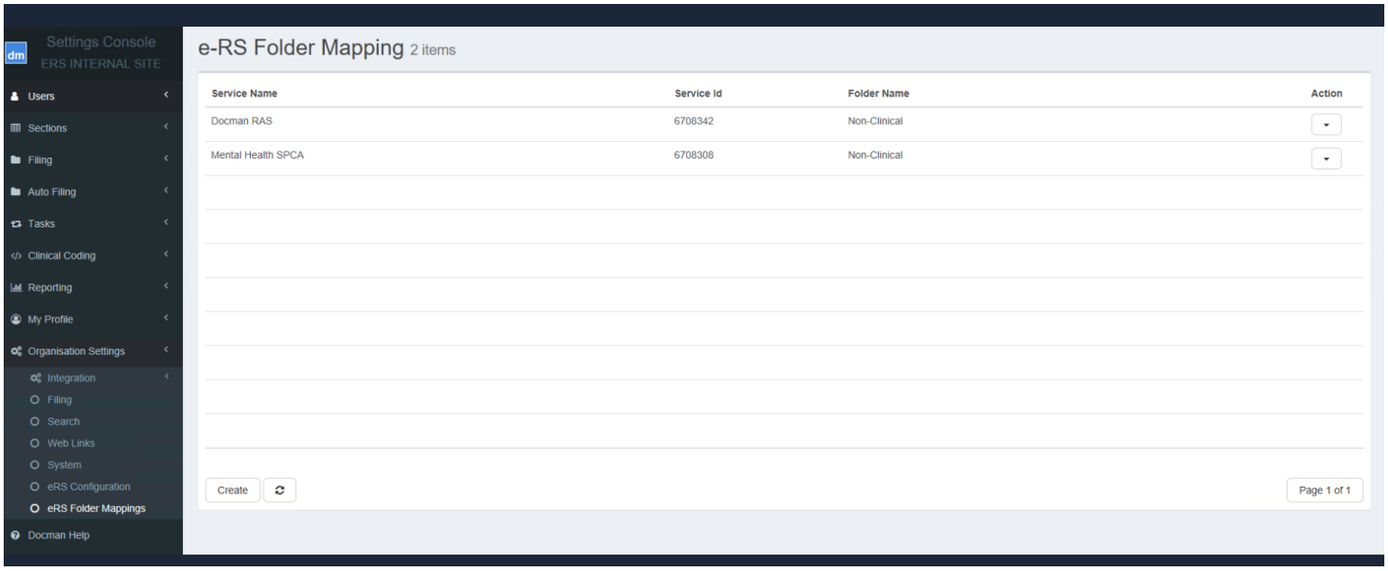
A new setting has been added to the Desktop App to configure a Windows Folder that Docman 10 will collect from.



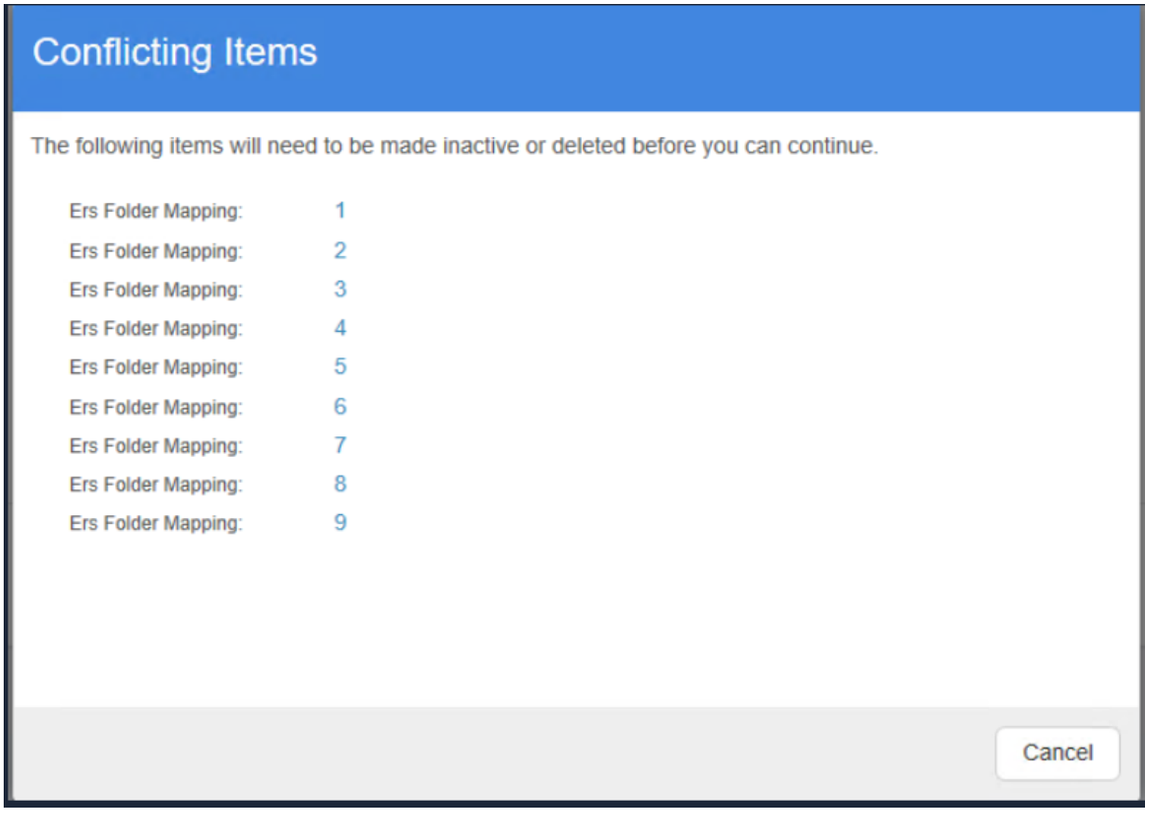
Here you can specify the file types that you wish to be collected and also select a designated filing folder that the documents will be imported in to.



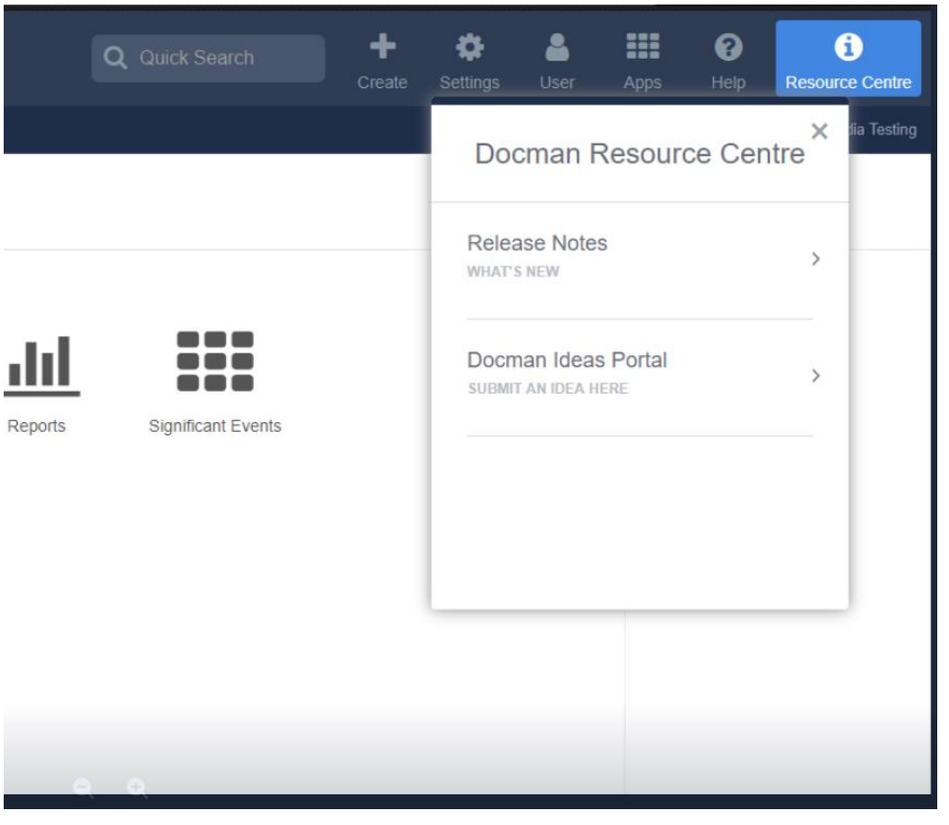
D10-3678 Mapping List for e-RS referrals in Settings



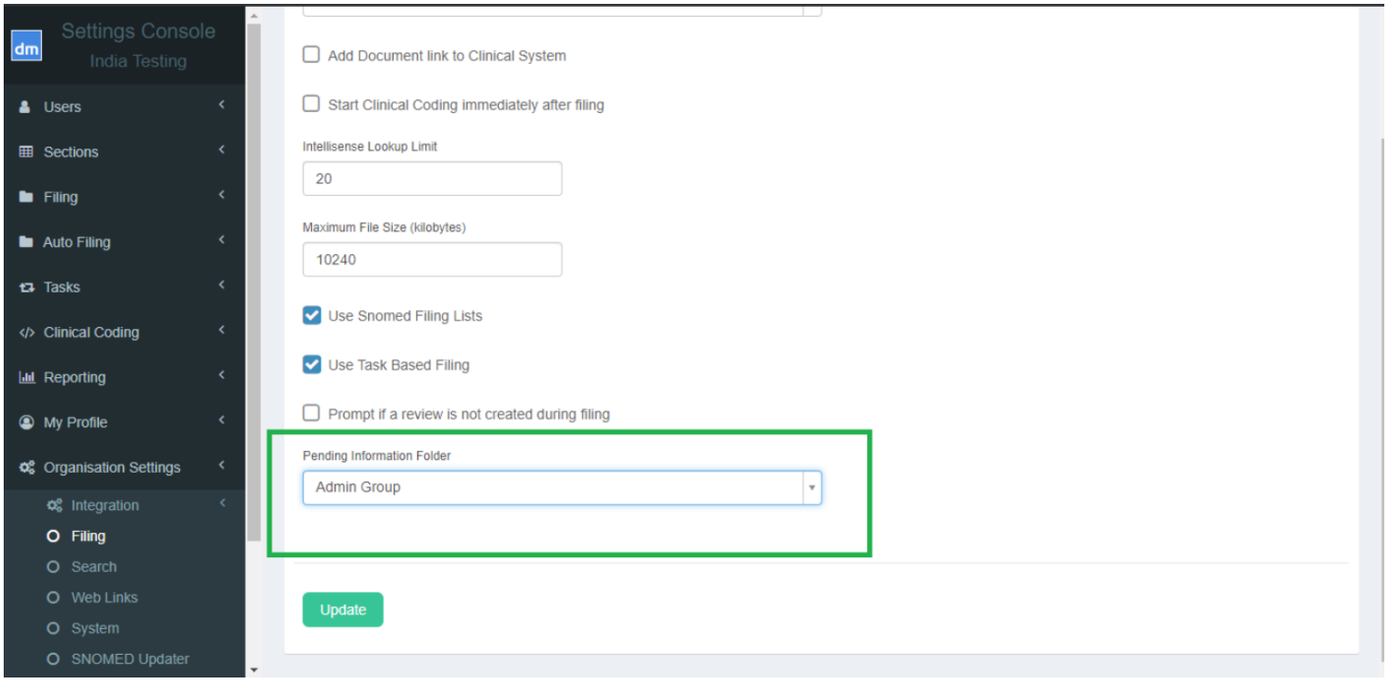
D10-3679 Conflict alert when deleting folders mapped to a DoS ID

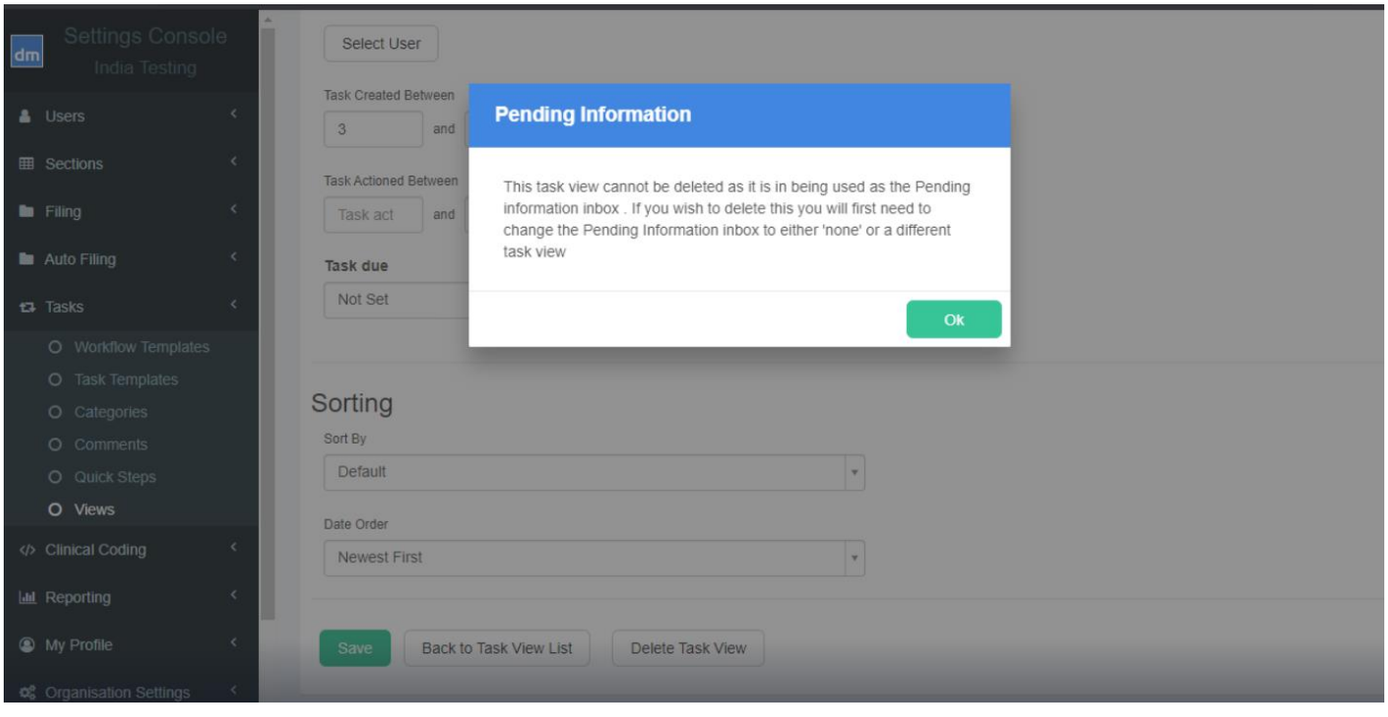


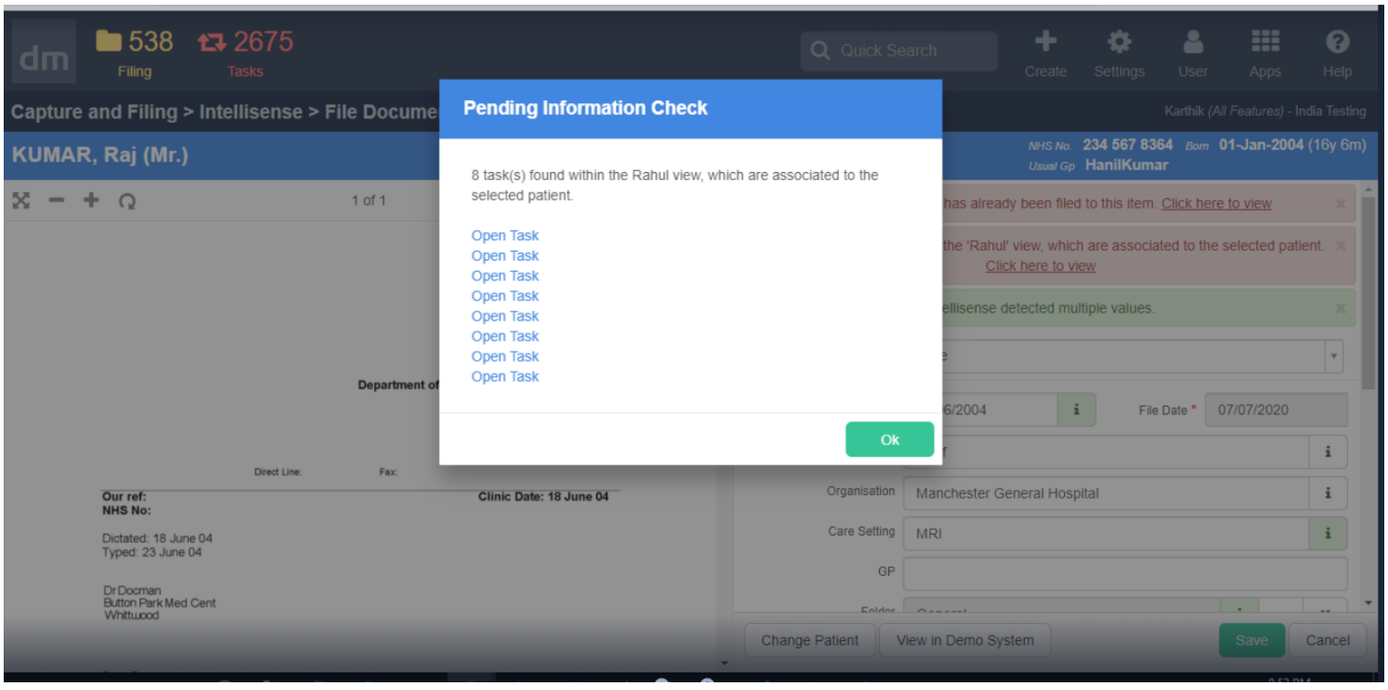
D10-3364 Resource Centre button added to the Navigation Bar

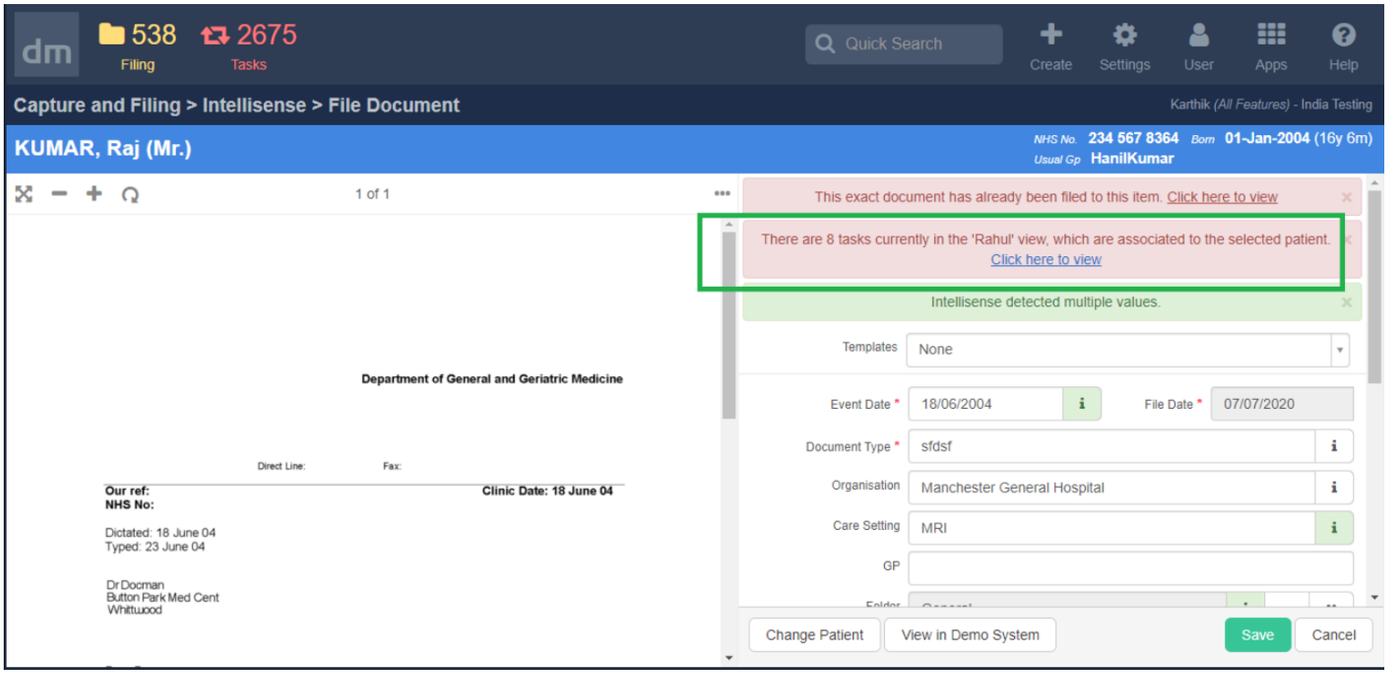


D10-3737 Ability to assign an existing Task View as a Pending Information task inbox






538
Filing
2675
Tasks
Quick Search
Create
Settings
User
Apps
Help
Capture and Filing > Intellisense > File Docume
Karthik (All Features) - India Testing
KUMAR, Raj (Mr.)
NHS No. 234 567 8364 Born 01-Jan-2004 (16y 6m)
Usual Gp HanilKumar
Pending Information Check
8 task(s) found within the Rahul view, which are associated to the selected patient.
Open Task
Open Task
Open Task
Open Task
Open Task
Open Task
Open Task
Open Task
Ok
1 of 1
has already been filed to this item. Click here to view
the 'Rahul' view, which are associated to the selected patient.
Click here to view
ellisense detected multiple values.
Department of
6/2004
File Date * 07/07/2020
Direct Line:
Fax:
Our ref:
NHS No:
Clinic Date: 18 June 04
Dictated: 18 June 04
Typed: 23 June 04
Dr Docman
Button Park Med Cent
Whittwood
Organisation Manchester General Hospital
Care Setting MRI
GP
Change Patient
View in Demo System
Save
Cancel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Tasks
Quick Search
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Capture and Filing > Intellisense > File Document
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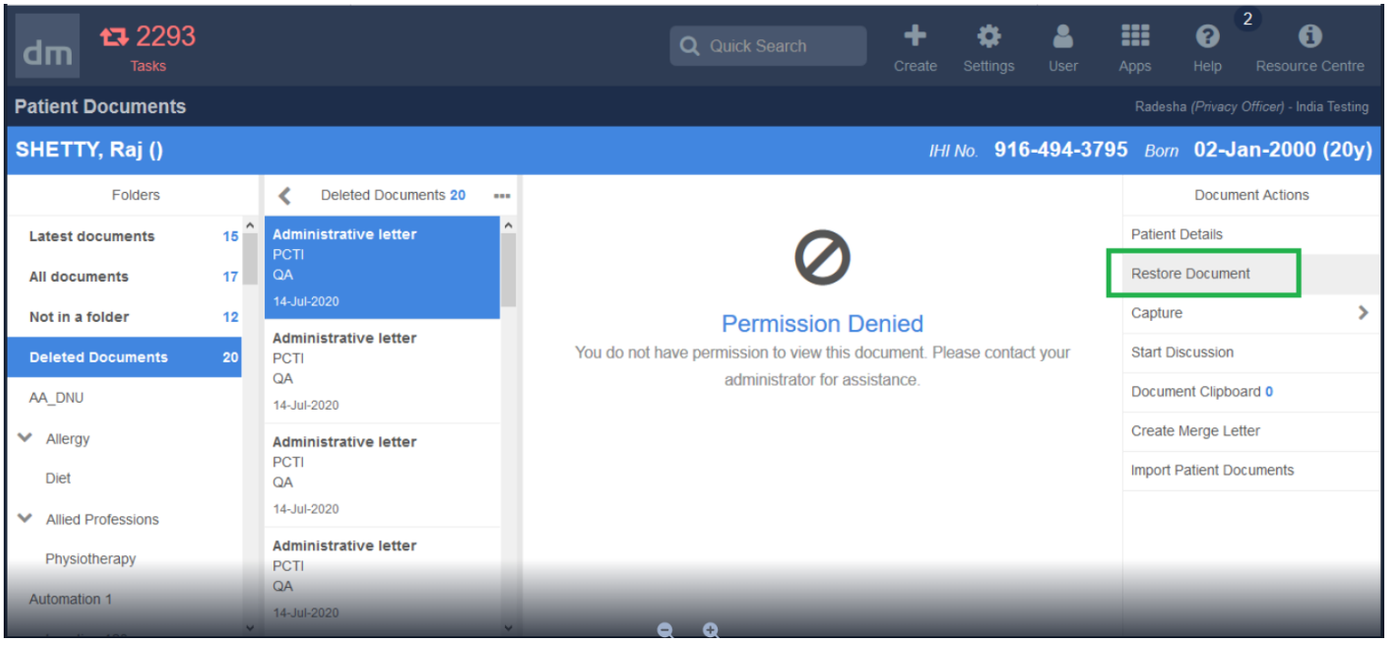
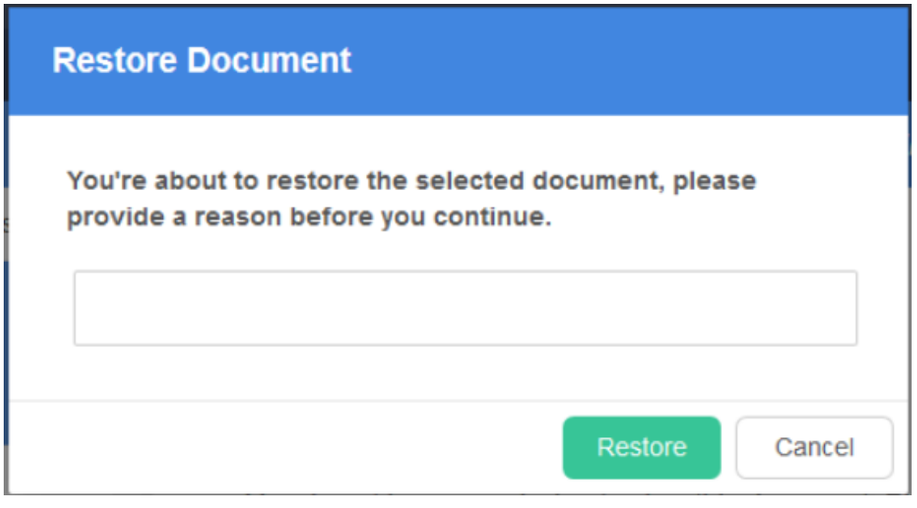
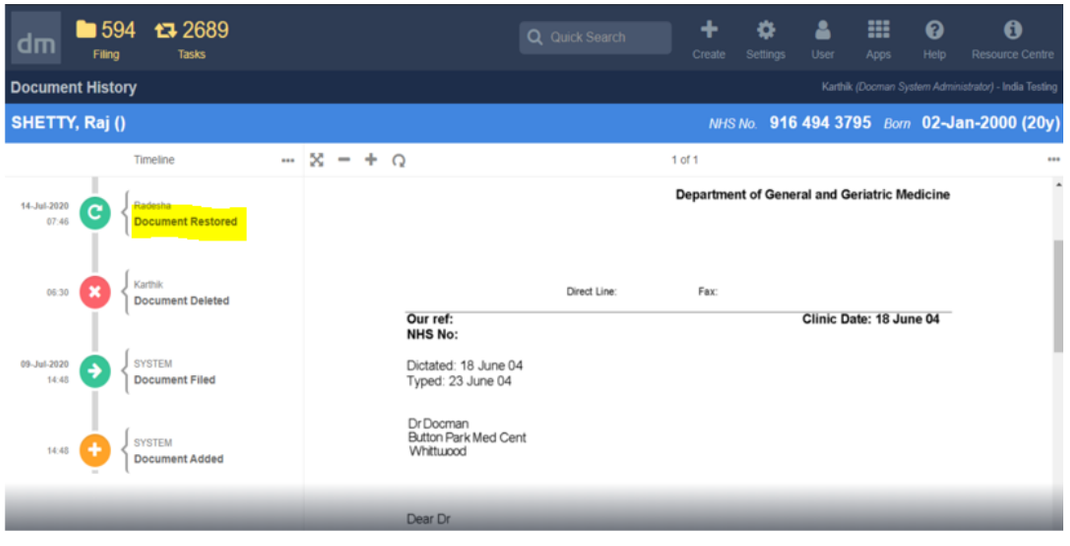
KUMAR, Raj (Mr.)
NHS No. 234 567 8364 Born 01-Jan-2004 (16y 6m)
Usual Gp HanilKumar
1 of 1
This exact document has already been filed to this item. Click here to view
There are 8 tasks currently in the 'Rahul' view, which are associated to the selected patient.
Click here to view
Intellisense detected multiple values.
Templates None
Department of General and Geriatric Medicine
Event Date * 18/06/2004
File Date * 07/07/2020
Direct Line:
Fax:
Document Type * sfdsf
Our ref:
NHS No:
Clinic Date: 18 June 04
Organisation Manchester General Hospital
Dictated: 18 June 04
Typed: 23 June 04
Care Setting MRI
GP
Dr Docman
Button Park Med Cent
Whittwood
Change Patient
View in Demo System
Save
Cancel

D10-3787 Ability to restore deleted documents