External Release Note
V70

docman
delivering paper free care

Product: Docman 10

Notes / Special Instructions: None.

This release contains the following work items:

ID	Work Item Type	Title/Description	Area of Docman 10
196	User Story	Database security updates	System maintenance.
201	User Story	Filing: Retain document properties when patient has been changed Enhanced filing with intellisense to ensure that when an alternative patient is chosen, the document properties remain populated.	Filing > choose your document > choose 'intellisense filing > scroll to the bottom and choose 'change patient.' This will keep all populated areas for the document but just change patient details.
207	User Story	Sign out page - Clicking the link to go to Login page directs user to pre-login page When choosing to sign-out the system will provide the option to navigate to the sign on screen without using single sign on.	Users > Sign out > Sign back in > This will prompt you for login detail.
223	User Story	eRS clinical Triage API: Accept & Reject Preparing for further implementation.	Phase one of two added to back end of Docman 10 in preparation for future work.
229	User Story	Filing: Add multiple clinical codes In the filing summary screen you can now add more than one clinical code during filing by	Filing > choose document > click file > select patient > scroll down to 'clinical code' ensuring you have ticked 'add document to EmisWeb' and choose as many clinical codes as you require.

		using the 'pick from Browser' option.	
241	User Story	Desktop App: Provide option to send all pages as individual pages We've extended the options within the desktop application so that you can choose to send scanned pages into a folder as individual pages. The option is available from the 'Send to Folder' drop down button when more than one page is selected. Service Now Ref: CHG0001153	Go to Filing > Filing Actions (right side of the screen) > Scan You will see the following screen where you need to click > capture from scanner and this will associate your connected scanner. Select more than one page and click 'send to folder'
244	User Story	Organisation Settings: Add setting to stipulate password expiry You can choose the user password expiry length you'd like in System sub-menu within Organisation Settings.	Settings > Organisation Settings > System > click the 'User Password Expiry' dropdown and choose period you would like your password to continue for, up to 120 days.
256	User Story	Filing: Provide action to view patient from filing screen We've added the option to view the patient record in the clinical system at the bottom of the filing summary screen.	Filing > Choose document to file > click file > at the bottom of the screen on the right side you will see 'View in EmisWeb'
312	User Story	Email document from a Patients Record and Tasks An action to email documents from Document Viewer or Tasks has been added to the action panel. This is also available for use on multiple documents when select mode has been used. This feature is only available where Microsoft Outlook was in use.	Patient Record: Search > Search for and select particular patient > Select document you want to email > Select email option from document actions on the right hand side. Tasks: Tasks > Select particular task that contains the document you want to email > Select email option for document actions on the right hand side.
313	User Story	Out of Office Prompt: Prompt on initial log in only When Out of Office is active: Users will only be prompted at the initial log on if they want to	Landing page > Toolbar of icons at the top right of the page > User > Mark me out of the office.

		be marked back in the office. Service Now Ref: CHG0001134	Once this is selected, users will only be prompted at the initial log on page if they want to change this.
314	User Story	Change the membership of multiple tasks Multiple tasks can be selected and forwarded to other users or a group using the select mode function in the context menu in the task inbox or views. This feature is only available on tasks and cannot be used on notifications and discussions. Service Now Ref: CHG0001136.	Tasks > Select mode (…) > Select each task you want to forward > Select Forward Tasks on the actions panel on the right hand side of the screen.
315	User Story	Annotations: When the highlight tool is selected the default shape is the rectangle.	Capture and filing > Select document to file > Annotate > Default shape is a rectangle. Tasks > Select relevant task > Annotate > Default shape is a rectangle.
316	User Story	Settings: Set default for intellisense templates When creating a new intellisense template, the keyword option defaults to 'any' keywords rather than 'all'. Service Now ref: CHG0001119	Settings > Filing > Intellisense Templates > Create > Default option for keywords is 'Any of the Keywords can match'.
317	User Story	Patient Upload: Include House Number and Road field We've added house number and road in the details that we can import as part of the patient data upload.	Quick Search > Advanced Search > Select add new patient on actions panel on the right hand side > You now have the option to enter the patients house number and road.
375	User Story	Viewer: Preview HTML files HMTL files can be viewed in the document preview pane. ServiceNow ref: CHG0001170.	Capture and filing/Tasks/Patient record > Select HTML document > This type of document can now be previewed in the middle of the screen.

384	User Story	Tasks: Expand size of field for comments We've changed the format of the field that stores the tasks comments and instructions from varchar(255) to TEXT.	Tasks > Select Task > Select add comment from actions panel on the right hand side > You can now type a free text comment that does not have a character limit.
407	User Story	Object Storage Keys - Optimisation	System Optimisation has been done to Object Storage Keys.
439	User Story	Reports- Changes to 'My Reports' We've introduced the concept of 'Shared Reports' in addition to 'My Reports' in the reporting module. Any content added to 'My Reports' area is now restricted to creator.	Apps > Reports > Shared Reports > This now shows you other users reports that have been shared specifically with you.
455	User Story	Docbot Documentation	System maintenance to update Docbot documentation.
462	User Story	Print with audit: Include Patient Details and Document Description We've added labels to show the patient and document details to the audit file that is generated when users choose to print a copy of the document audit. ServiceNow Ref: CHG0001164.	Capture and Filing/ Patient record/ Task > Select document/ Task > Select Print from Actions panel (right hand side of the screen) > Include document audit when printing files > Print > Name document and save locally to your PC > When document is printed it will include the patients name and description.
470	User Story	Update Desktop App SSL Certificate	System maintenance. New SSL certificate applied.
471	User Story	Update Solution Version	System maintenance.
562	User Story	Reports: Change the default option for Docman Content filter in Document List report The default value for the Document Content option is 'Contains'.	Apps > Reports > Documents > Document List > Document Content > Default option is 'Contains'.
636	User Story	Update DBVB 2.8	System maintenance.

663	User Story	Document Viewer Timeline: Review 'Move to next level' event. We have added a label that states 'Next review level started' on the document timeline and have associated it with a system event.	Patient Record: Search > Search for patient > Select Document > View History > If a document has been moved to the next level it will state 'Next Review Level Started' there on the timeline and will associate it with a system event.
668	User Story	WebApp 10.1.67 - Sign In Validation	An issue has been resolved that was occurring during Single Sign On if local desktop PC's clocks don't match Docman 10 server clocks. This would generate an error and block sign in.
675	User Story	Obfuscate Files	System maintenance.