

RELEASE NOTE

Docman Connect

Customer Release

Version 2.233.3

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What's New?

UI/UX Changes to the Document List Filters

In Docman Connect, users can apply filters to the documents shown in the Document List. These filters include the source user, the organisation the document was sent to, the document ID or the patient's name. Previous user research identified some issues with the appearance and efficiency of the current filters. We've now introduced some changes to these filters with new functionality and changes to the appearance. Please find more information on the changes below.



Filters: Provide configuration and user choice between which filter method to use (old/new)

Internal reference DCMC-3769

Description

As part of the work to improve the functionality and appearance of the Document List filter panel, some additional configuration settings have been created. Admin / PCTI users can access the 'Document List Filter' configuration settings by going to the System Configuration page.

There are four available settings which the user can choose from:

Case 1 - Old Filter only

- Users will see the old Document List filter panel
- There will be no option for users to use the new filter panel

Case 2 - Old Filter by default and option to switch to New Filters

- Users will see the old Document List filter panel by default
- Users will have the option to toggle between the old and new filter panel by selecting 'Use New Filters' or 'Use Old Filters' on the Document List page
- When users log out and log back in, the old filter panel will be the default setting

Case 3 - New Filter by default and option to switch to Old Filters

- Users will see the new Document List filter panel by default
- Users will have the option to toggle between the new and old filter panel by selecting 'Use Old Filters' or 'Use New Filters' on the Document List page
- When users log out and log back in, the new filter panel will be the default setting

Case 4 - New Filter only

- Users will see the new Document List filter panel
- There will be no option for users to use the old filter panel

Document List Filter	Nhs Mail Auth Configuration
<p>Use New Document List Filters</p>	<div data-bbox="531 443 1402 633"><ul style="list-style-type: none">OldFilterDefaultOldFilterOnlyOldFilterDefaultNewFilterDefaultNewFilterOnly</div>
<p>Save Settings</p>	

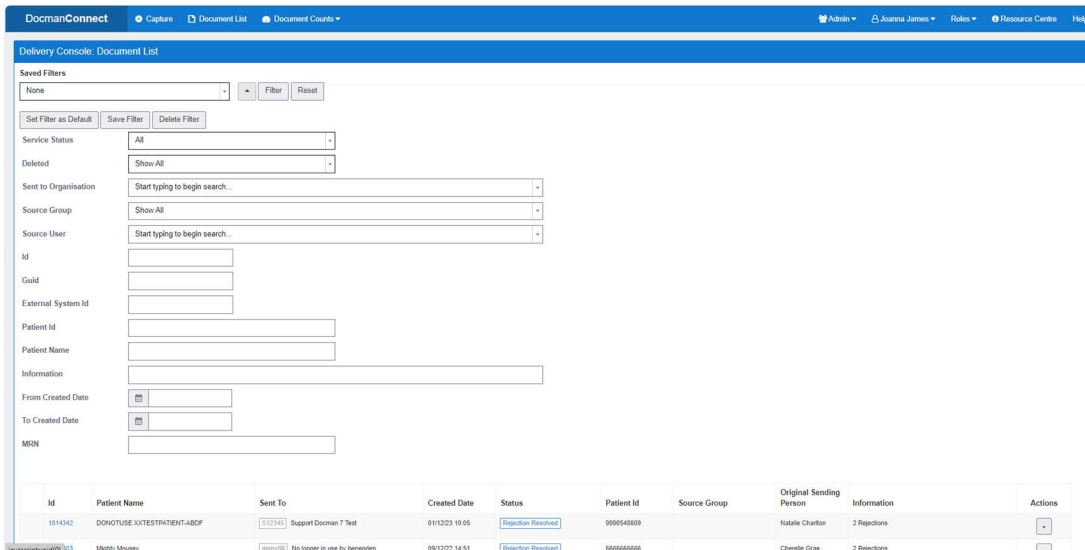
DocListFilterImprovements - Create basic filter UI on new Document List

Internal reference DCMC-3357

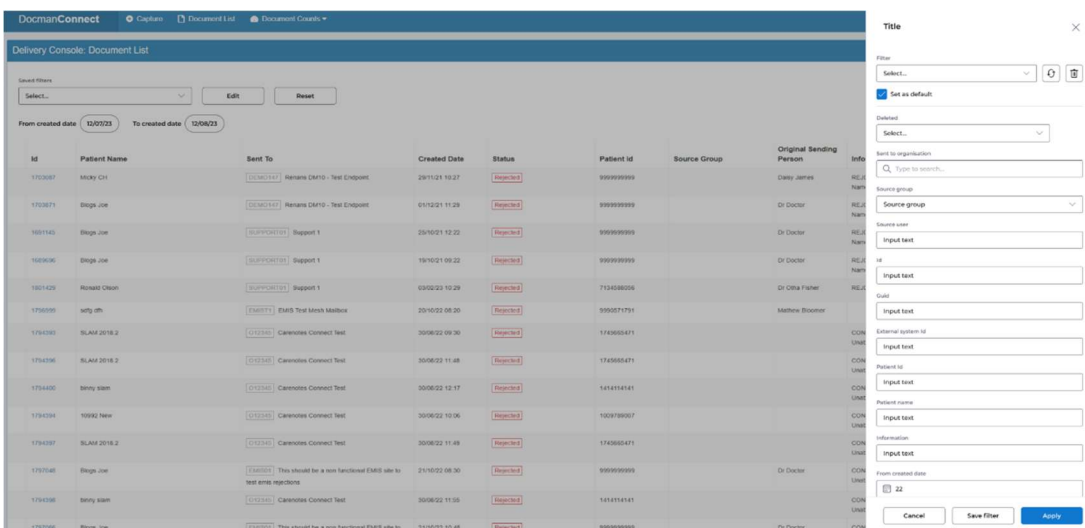
Description

The Document List filter panel now slides out from the right of the screen (as opposed to the previous filter panel which dropped down from the top). Selecting the 'Edit' button will activate the filter panel on the right of the screen. The user can add / edit / save filters via the scrollable filter panel. Selecting the 'Cancel' button will collapse the filter panel.

Old Filter Panel Appearance



New Filter Panel Appearance



DocListFilterImprovements - migrate fields from old document list/filters to new

Internal reference DCMC-3394

Description

Following the changes to the appearance of the filter panel in the Document List, all the available fields were migrated over from the old filter panel to the new filter panel. The filters were tested extensively using different user types and user scenarios including the use of multiple filters at once.

DocListFilterImprovements - Saving custom filters.

Internal reference DCMC-3433

Description

The old Document List filter panel allowed users to save a customer filter. The custom filter would then appear in the Saved Filters dropdown menu. However, when selecting a custom filter, users had to click 'Filter' after they had made their selection to apply the custom filter.

The new filter panel still allows users to save a custom filter using the 'Save Filter' button at the bottom of the panel. However, when a saved filter is selected from the dropdown menu on the Document List, it will be automatically applied and the individual filters will be shown in the chips at the top of the list.

Users can select the refresh button to clear all selected filters. If a user selects a saved filter from the dropdown menu and makes any changes to the filter selection, the 'Saved Filters' field will be greyed out and the user will be able to save this as a new custom filter. Users can also delete a saved filter by selecting the bin icon.

The screenshot shows a filter configuration panel with the following sections:

- Saved Filters:** A dropdown menu currently showing 'Admin Filter', with refresh and delete icons to its right.
- Set as default
- Service Status:** A dropdown menu with 'All' selected.
- Document Status:** A dropdown menu with 'All' selected.
- Deleted:** A dropdown menu with 'Non-Deleted Only' selected.
- Sender Type:** A dropdown menu with 'Show All' selected.
- Destination Type:** A dropdown menu with 'Show All' selected.
- Clinical Provider:** A dropdown menu with 'Show All' selected.
- Sender organisation:** A search dropdown with the placeholder 'Start typing to begin search...'.
- Destination organisation:** A search dropdown with the placeholder 'Start typing to begin search...'.
- Source Group:** A search dropdown with the placeholder 'Start typing to search...'.
- Id:** A text input field.
- Guid:** A text input field.
- External system Id:** A text input field.
- Patient Id:** A text input field.
- Information:** A text input field.
- From Created Date:** A date range selector with a calendar icon.
- To Created Date:** A date range selector with a calendar icon.

At the bottom of the panel are three buttons: 'Cancel', 'Save Filter', and 'Apply'.

★ DocListFilterImprovements - Give customers the ability to select 'multiple' values per field.

Internal reference DCMC-3434

Description

The new filter panel allows users to select more than one value in the 'Service Status', 'Send from Organisation' and 'Send to Organisation' fields. This reduces the need for searches to be repeated and improves the efficiency of the filter process.

This multi-selection functionality is limited for some user roles:

- **Admin User/PCTI User** - Can select none, one or multiple values in all three of the 'Service Status', 'Send from Organisation' and 'Send to Organisation' fields
- **Sending User** – Can select none, one or multiple values in the 'Service Status' and 'Send to Organisation' fields
- **Collection User** – Can select none, one or multiple values in the 'Service Status' and 'Send from Organisation' fields

★ DocListFilterImprovements - Design and implement 'badges/chips' for applied filters

Internal reference DCMC-3435

Description

Any filters which are applied to the document list via the new filter panel will be indicated at the top of the page in a series of chips. If a user makes any changes to the filter selection, the chips will update accordingly.

New Filter Chips

Saved Filters

▼ Edit Reset Use old filters

Service Status: Received,Accepted,Delivered **From Created Date:** 01/04/2024 **Deleted:** Non-Deleted Only



Document List Filter Enhancement | Increase number of saved filters

Internal reference DCMC-3657

Description

As part of the work to improve the functionality and efficiency of the filters in the Document List, the maximum number of save filters a user can have has been increased from five to twenty. This will save time and ensure that users can create as many saved filters as they require without having to delete an existing saved filter.



Filters: Anchor actions button in current section of pane in view

Internal reference DCMC-3768

Description

In addition to the changes to the filter panel described above, the action buttons within the panel 'Cancel', 'Save Filter' and 'Apply' have been anchored to the section of the panel which is being viewed. This means that, regardless of the section of the panel a user is viewing, the action buttons are accessible without having to scroll to the bottom of the page.



Improve Document List Filters - Date Period Search

Internal reference DCMC-2668

Description

A new field has been added to the new Document List filter panel which allows users to select a specific date period they would like to filter by. The date periods users can choose from are:

- Yesterday
- Last 48 hours
- Last Week
- Last Month
- Last Year

These set date periods are in addition to the date-picker fields which allow users to specify 'From Created Date' and 'To Created Date' dates to filter by. Users can only use one method to filter by date. For instance, if a preset date period is selected, the 'From Created Date' and 'To Created Date' filters are greyed out.

If a user saves a filter with one of these preset date periods, the parameters will update automatically. For instance, if a user saves a filter using the 'Last Year' date period and uses it to search the Document List on 1st January 2024, the search will return all documents from 1st January 2024 to 1st January 2023. If they use this saved filter again on 2nd January 2024, the search will return all documents from 2nd January 2024 to 2nd January 2023.

What's New?



Remove REJ06 rejection reason

Internal reference DCMC-4176

Description

We have removed the Custom Reason rejection, currently this rejection can be used by practices to reject a document with the option for the practice to provide a free text comment to provide their reasoning.

We have removed the Custom Reason rejection because our research showed that it was not being used effectively and was creating additional work for both senders and GP practices.

We recently introduced two additional rejection reasons, 'Deceased/End of Life' and 'Invalid Document'. Through our investigations, we found that the majority of the Custom Reason rejections we reviewed should have been rejected using one of these new rejection reasons instead.

Defect Fixes



NHSMail - ConBot not proceeding beyond first mailbox

Internal reference DCMC-4206

Problem

An issue was detected with the Connect process to trigger collections from NHSMail mailboxes. The automated process is intended to collect from an NHSMail mailbox before moving on to the next mailbox and repeating the process. It was found that the collector was getting stuck and was not proceeding beyond the first mailbox.

Resolution

The issue was found to be due to a loop created when an 'attachment type' filter was applied to an NHSMail collection. The team have resolved this issue to ensure the loop is broken and the collector can proceed through each of the NHSMail mailboxes.

Current Issues



File Size 'bloating' post conversion

Internal reference DCMC-3480

Problem

Docman Connect currently uses Aspose.Word and Aspose.PDF as part of the document conversion process. Issues around file size bloating have been reported by numerous customers and internal staff and Aspose have acknowledged there is an issue with file size bloating. The team are investigating another conversion tool which can either fully or partially replace Aspose.

Kind Regards, The Docman Connect Team

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