



# Managing Docman Efficiently in Practice

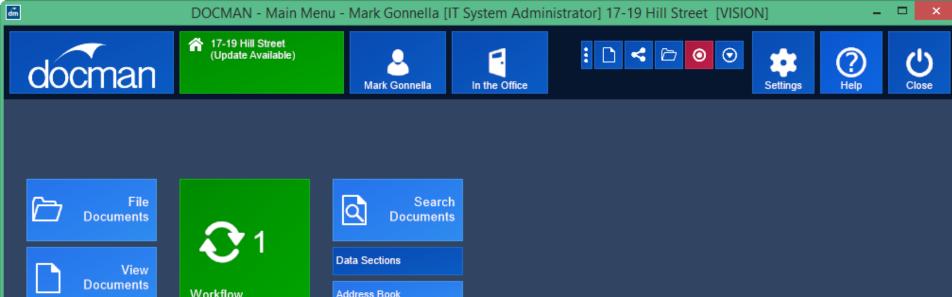
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## Workshop Topics



- ➤ New User Interface
- ➤ Docman Updates
- ➤ Import & Export
- > Workflow
- ➤ Maintain Lists
- > Patient Record
- ➤ Service Desk & Support Tips





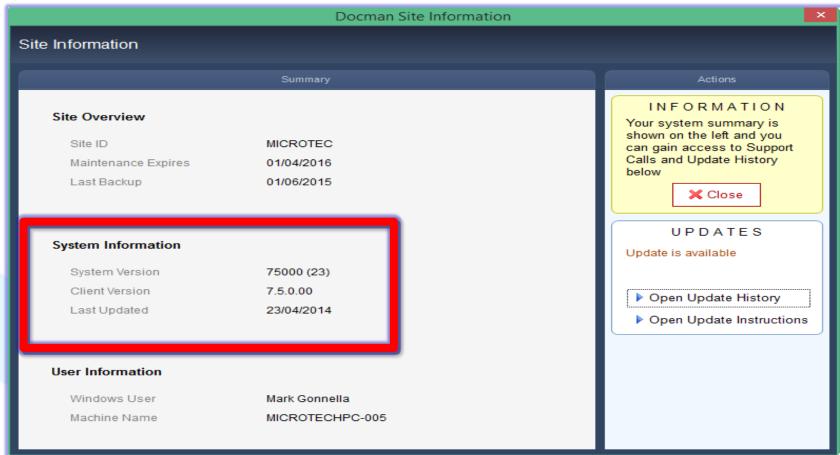
BackOffice Apps



## Docman Updates







#### Delivering better health



### Docman Updates



#### **Update Panel**

UPDATES
Update is available

- Open Update History
- Open Update Instructions

- Who updates your Docman?
  - Health Board
  - Microtech
  - Practice
- Updating Docman Tips
  - Everyone needs logged out of Docman
  - Update needs run on the server
  - Microtech Support for assistance



## Import & Export



- How many staff know how to Export & Import the Docman record?
- Saving the correct file type into Docman
  - Clinical Summary as a TIF
  - Don't drop Shortcuts into patient records
- If the Docman Export fails.....<u>DO NOT</u> attempt a second export
- Remember to Archive!
- PSD Guidance Docman Transfer
- What does and doesn't transfer?
- Restoring a Docman Record



#### Workflow



- Switching from Standard Workflow to SmartUI
   (Administer System Configuration & Integration Workflow Implementation)
- SmartUI Advantages
  - Browse Documents, Phone No, No popups
- Manage Views add new views, remove/adjust old views
- Move Workflows (Bulk Re-Route)
- Completed Workflow
- My Recent Workflows



#### Maintain Lists



- User Maintenance
  - Inactivate users
  - Move Inactive Users workflows
  - Re-Activate User
- Make sure you have admin cover to reset and unlock users in the practice – not just one user
- New User Functions
  - User Based Reports
  - Move Workflows
  - Add higher rights to existing user
- Maintain Workflow Recipient Groups Remove Inactivate Users
- Actions & Comments Review for consistency & relevance. Remove comment. Re-order with new Workflow Interface
- Document Folders should be 48 for Patients Section
- Filing Lists no blank folders in Administration/Departments/Labs Lists



#### Patient Record



- Maintaining the Patient Record
  - Copy & Move documents through Select Mode if needing to copy to another patient or file into correct patients record
  - Hide Inactive Folders Make sure it is Enabled
  - Drag & Drop misfiled documents into the correct folder in a patients record – especially those in the "Not in a Folder" folder
  - Docman Toolbar now stays where dropped under latest versions





## Service Desk Hints & Tips

- Checking you Docman Backup
- Change your Practice Name
- Scanner Pads
- Cleaning Scanner Lamps







### Questions

