



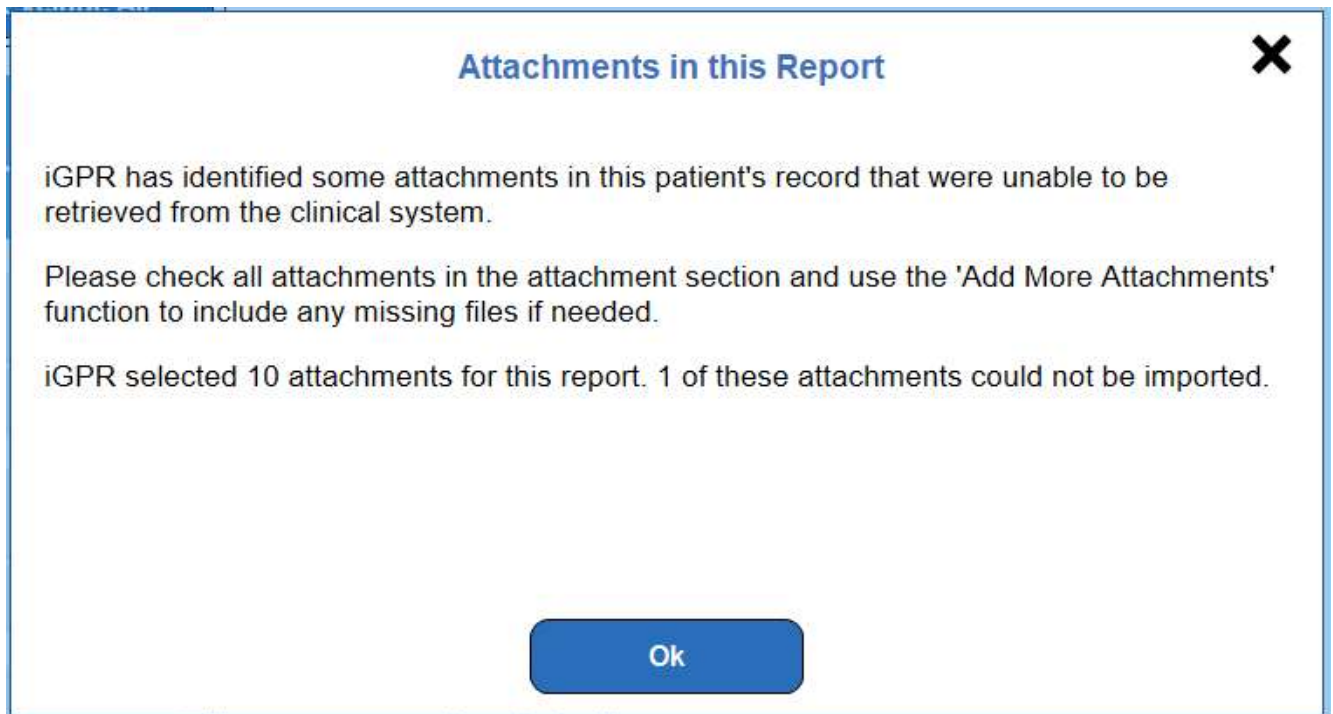
Docman Import Guide (Docman 7)

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Document attachment notification

If you receive the following notification message when going into the attachments section of a report then you will be required to run through an import process. The reason you are receiving this message is due to the patient's record containing documents that were filed in Docman using the file format of .xxx



Stage 1 – Docman Export Process (England)



Open the patient's record in Docman and click on the 'Document tab' at the top of the screen.



From the drop down menu select the 'Export' option, if this option is not visible on the drop down menu you will need to speak to your Docman administration to grant you access to the 'Archive' functionality.

The screenshot shows the iGPR Docman interface. The 'Document' tab is selected at the top. A dropdown menu is open, showing various options including 'Export'. The main area displays a list of documents with columns for Description, Organisation, Department, Person, and Notes. The NHS logo and contact information for Teaching Hospitals are visible at the bottom.

Description	Organisation	Department	Person	Notes
Administration Letter	Application for Socia			
gastroenteris ** PLEDT **	Frimley Park Hospital	Frimley	NEL	STATUS: 1004 *** D
Discharge Letter	Frimley Park Hospital	BOG Referral		
gastroenteris ** PLEDT **	Frimley Park Hospital	Frimley	NEL	STATUS: 1004 *** D
Discharge Letter	Frimley Park Hospital	CARD referral		
Discharge Letter	Great Ormond Stree	CARD referral		
Out Of Hours Letter	Seen in POC			
Discharge Letter	Frimley Park Hospital	CARD referral		
Administration Letter	Application for Socia			
Administration Letter	Application for Socia			
GYN&E		Gynaecology		
Hospital / Clinic Letter	Frimley Park Hospital	Cardiology		
Hospital / Clinic Letter	Frimley Park Hospital	Pain Management		

Teaching Hospitals **NHS**
NHS Trust

BREAST SERVICES:
SURGERY ONCOLOGY & RADIOTHERAPY
Mr S R Professor R E
Tel: 011 1 2829 Tel: 011 6 5079

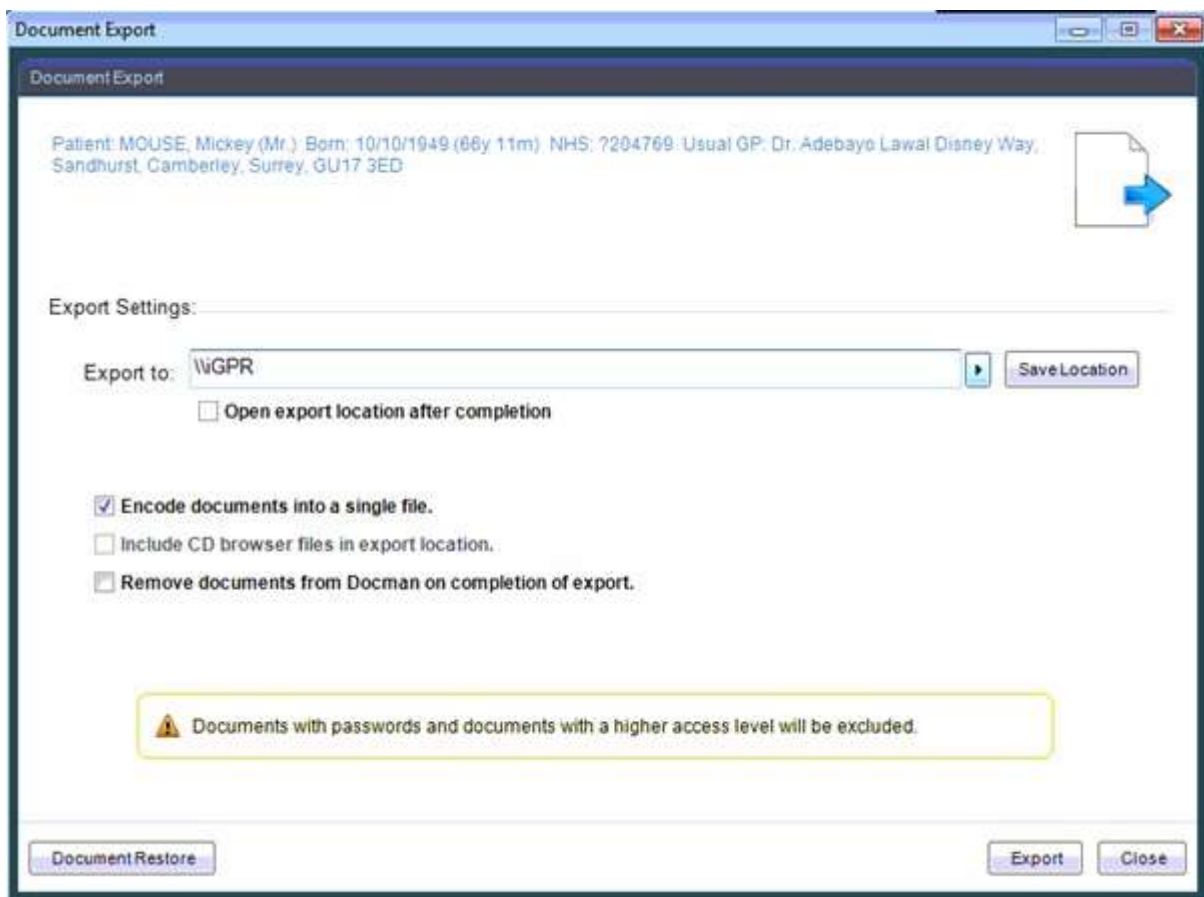
Royal Hallamshire Hospital
Glossop Road
Sheffield
S10 2JF

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Once the 'Export' screen has loaded ensure the following is selected:-

- Select a location where you are saving the file to, it is recommended that the file is saved in a network folder rather than locally on your machine. To choose the location click on the arrow at the end of the 'Export to:' field.
- Select the folder you wish to save the export file to, once selected click on the 'Save Location' button.
- Ensure that the only box that is ticked is 'Encode Documents into a single file'
**** ENSURE THE OTHER BOXES ARE NOT TICKED ****
- Click on 'Export'.
- Click 'Yes' to confirm the export without removing the documents from Docman on completion.
- Click 'No Paper Medical Record'.
- The Docman export file will now be created.



The screenshot shows the 'Document Export' dialog box. At the top, it displays patient information: 'Patient: MOUSE, Mickey (Mr.) Born: 10/10/1949 (66y 11m) NHS: 7204769 Usual GP: Dr. Adebayo Lawal Disney Way, Sandhurst, Camberley, Surrey, GU17 3ED'. To the right of this text is a document icon with a blue arrow pointing right. Below the patient information is the 'Export Settings:' section. It includes an 'Export to:' text box containing the path '\\GPR', followed by a small blue arrow icon and a 'Save Location' button. Below this is a checkbox labeled 'Open export location after completion' which is currently unchecked. There are three checkboxes below that: 'Encode documents into a single file.' (checked), 'Include CD browser files in export location.' (unchecked), and 'Remove documents from Docman on completion of export.' (unchecked). At the bottom of the dialog, there is a yellow warning box with a triangle icon and the text 'Documents with passwords and documents with a higher access level will be excluded.' At the very bottom, there are three buttons: 'Document Restore' on the left, and 'Export' and 'Close' on the right.

Stage 2 - Import Docman documents into iGPR (England)



Open the iGPR report for the patient and click on the 'Attachments' tab.

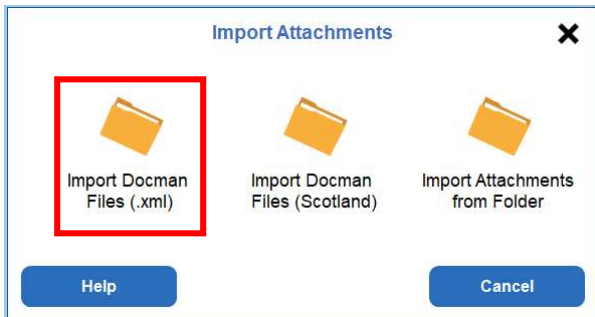


Click on the 'Add More Attachments' button.

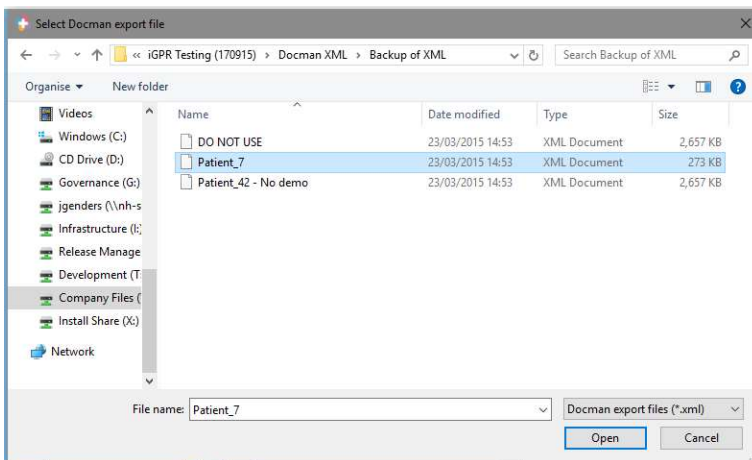




Select the 'Import Docman Files (.xml)' Option.



You will now be presented with a Windows browse screen, navigate to the same location that you saved the export file in stage 1, select the exported file (this will be labelled as patient_number.xml) and click on 'Open'.



You will be presented with the Docman Import screen, from here you can untick documents that you do not wish to include as part of the report. It is recommended that you ensure that 'Delete file after import?' is ticked - this will automatically remove the exported file after the import has been completed. Click 'Confirm' to start the import.

Import Docman Attachments

No changes will be made to your clinical system

Name: LINDA MAUD WILKINSON
0 "xxx" attachments, 0 "xx2" attachments out of 11 total

- Delete file after import?
- Remove pre-existing XXX/XX2 after import?

Select All

Attachment list:

Description	Size	Event Date	File Date
<input checked="" type="checkbox"/> Admin Letter Job centre Benefit...	49.9 KB	04-Nov-2011	04-Nov-2011
<input checked="" type="checkbox"/> Clinical Letter Physiotherapy S...	6.62 KB	27-Oct-2011	27-Oct-2011
<input checked="" type="checkbox"/> Discharge Summary/Report {Ou...	13.0 KB	27-Oct-2011	27-Oct-2011
<input checked="" type="checkbox"/> Clinical Letter A & E	8.97 KB	26-Oct-2011	26-Oct-2011
<input checked="" type="checkbox"/> Clinical Letter Cardiology	6.69 KB	26-Oct-2011	26-Oct-2011
<input checked="" type="checkbox"/> Clinical Letter A & E	30.3 KB	04-Aug-2011	26-Oct-2011

Cancel

Confirm

Stage 1 – Docman Export Process (Scotland)

Prior to running the following export process, you must ensure that your local Health Board have installed and configured the PDF Creator software allowing you to export the documents into PDF format. Your Health Board also need to make you aware of the folder location these files will get saved to.



Open the patient's record in Docman and click on the 'Selected Documents' item at the top of the screen and click on 'Select Mode' from the drop-down list.

The screenshot shows the Docman interface with the 'Selected Documents' menu open. The 'Select mode' option is highlighted. The main window displays a list of documents with columns for Date, Description, Organisation, and Department.

Date	Description	Organisation	Department
05 Jun 10	Clinical Letter	Community	Accident & Emergency
05 Jun 10	Ann Test RTF.rtf	Belford Hospital	Dietetics
05 Jun 10	Referral	Belford Hospital	Dietetics
05 Jun 10	Referral	Caithness General ...	Clinical Radiology
05 Jun 10	Referral	Belford Hospital	General Medicine
05 Jun 10	Referral	Belford Hospital	General Medicine
05 Jun 10	Advice Response	Raigmore Hospital	General Medicine
05 Jun 10	Advice Response	Raigmore Hospital	Allergy
05 Jun 10	Advice Request	Raigmore Hospital	Allergy
27 Jul 10	Attach 3 (.html).htm	Raigmore Hospital	Cardiology
27 Jul 10	Referral	Raigmore Hospital	Cardiology
25 Jun 10	Referral	Raigmore Hospital	General Surgery
25 Jun 10	Referral	Raigmore Hospital	General Surgery



Each document will now have a tick box displayed on the left; click on the relevant documents you wish to include within the insurance report.

The screenshot shows the Docman interface with the document list. Each document row now has a tick box in the left column. The 'Selected Documents' menu is no longer open.

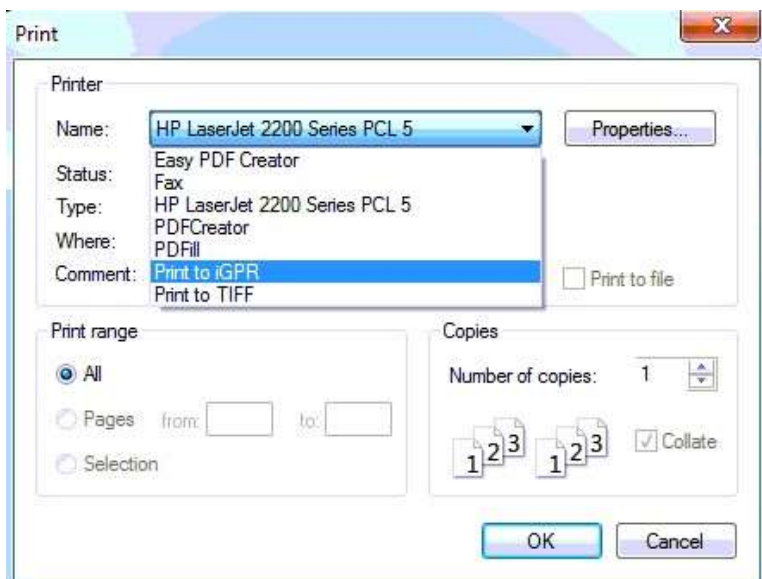
Event	Description	Organisation	Department
<input type="checkbox"/>	04 Jun 15 Clinical Letter	Community	Accident & Emergency
<input type="checkbox"/>	13 Oct 10 Ann Test RTF.rtf	Belford Hospital	Dietetics
<input type="checkbox"/>	13 Oct 10 Referral	Belford Hospital	Dietetics
<input type="checkbox"/>	12 Oct 10 Referral	Caithness General ...	Clinical Radiology
<input type="checkbox"/>	29 Sep 10 Referral	Belford Hospital	General Medicine
<input type="checkbox"/>	29 Sep 10 Referral	Belford Hospital	General Medicine
<input checked="" type="checkbox"/>	17 Sep 10 Advice Response	Raigmore Hospital	General Medicine
<input checked="" type="checkbox"/>	17 Sep 10 Advice Response	Raigmore Hospital	Allergy
<input type="checkbox"/>	17 Sep 10 Advice Request	Raigmore Hospital	Allergy
<input type="checkbox"/>	27 Jul 10 Attach 3 (.html).htm	Raigmore Hospital	Cardiology
<input type="checkbox"/>	27 Jul 10 Referral	Raigmore Hospital	Cardiology
<input type="checkbox"/>	25 Jun 10 Referral	Raigmore Hospital	General Surgery
<input type="checkbox"/>	25 Jun 10 Referral	Raigmore Hospital	General Surgery
<input type="checkbox"/>	10 Jun 10 Referral	Raigmore Hospital	Ear, Nose & Throat
<input type="checkbox"/>	10 Jun 10 Referral	Raigmore Hospital	Womens Health



Once you have selected the documents, click on 'Selected Documents' at the top of the screen and select 'Print' from the drop-down menu. Once the print screen has loaded, click on 'Setup'.



Click on the drop-down arrow on the name within the printer section and select the 'Print to iGPR' printer and click on 'Ok'.

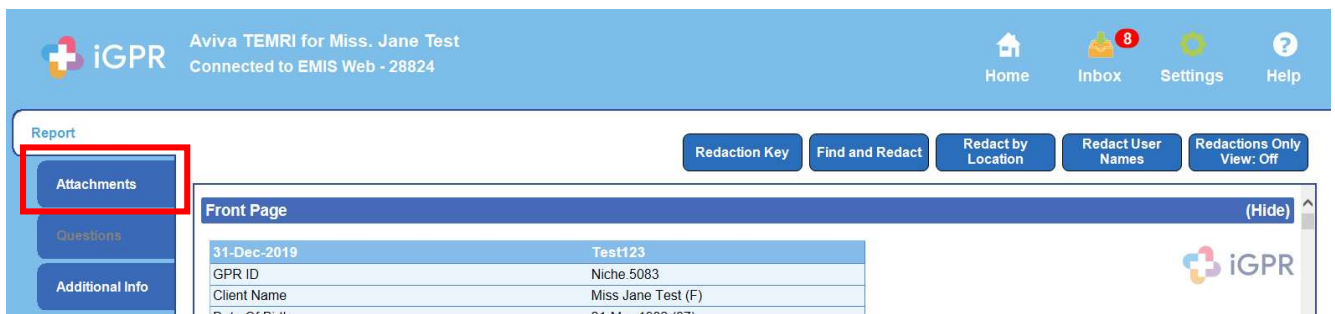


Click on 'Print' and the selected documents will now get converted to PDF and saved to the default location on your network drive. Your Health Board would have made you aware of this default location.

Stage 2 - Import Docman documents into iGPR (Scotland)



Open the iGPR report for the patient and click on the 'Attachments' tab.



Once in the attachments screen click on the "Add More Attachments" button.

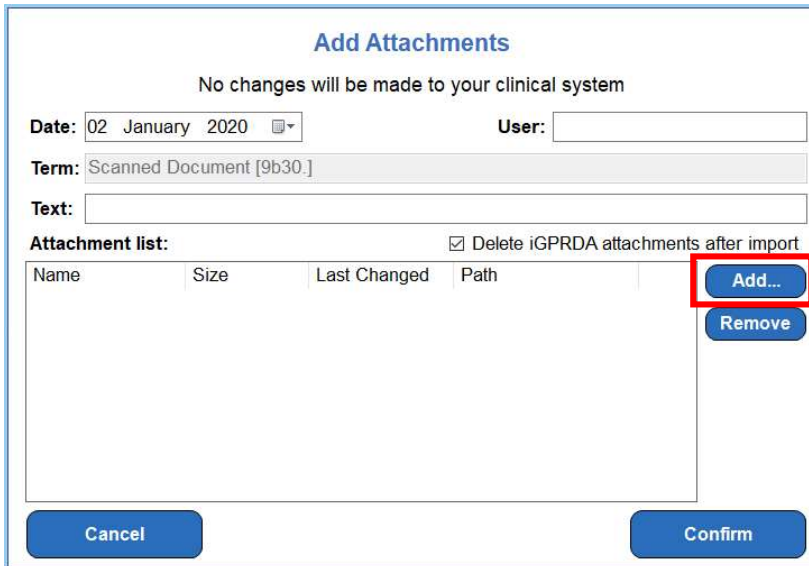


Select the "Import Docman Files (Scotland)" button.





You will now be presented with an “Add Attachments” Screen. The “Delete iGPRDA attachments after import” is ticked by default. Click on the “Add” button to which will then load up a Windows File Explorer screen.



Add Attachments

No changes will be made to your clinical system

Date: 02 January 2020 User:

Term: Scanned Document [9b30.]

Text:

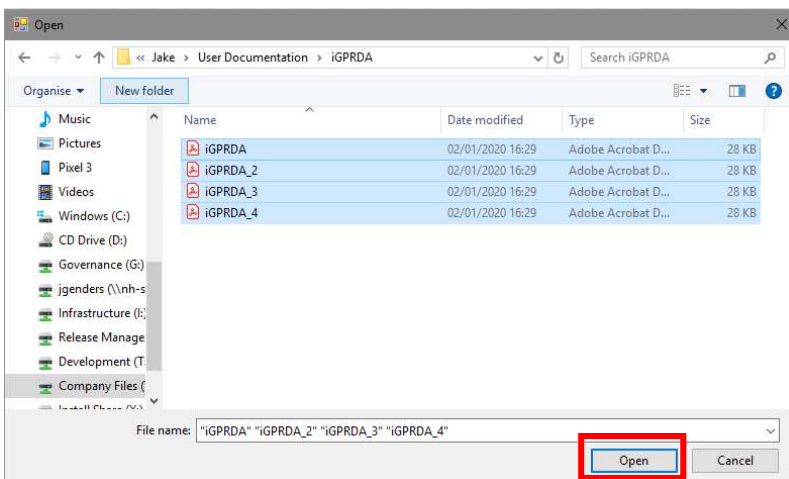
Attachment list: Delete iGPRDA attachments after import

Name	Size	Last Changed	Path

Buttons: Add..., Remove, Cancel, Confirm



Navigate to the folder location where your documents are saved (Your Health Board would have made you aware of this location).



Select all of the files in this folder by single clicking on a document (this will change the colour) and then pressing CTRL-A on the keyboard, this will then automatically select all documents. Once all documents are selected, click on the ‘Open’ button.



You will now return to the 'Add Attachments' screen, displaying the file names to be imported into iGPR. Click 'Confirm' to import the files.

Add Attachments

No changes will be made to your clinical system

Date: 02 January 2020 **User:**

Term: Scanned Document [9b30.]

Text:

Attachment list: Delete iGPRDA attachments after import

Name	Size	Last Changed	Path	
iGPRDA.pdf	27.8 KB	02-Jan-2020	W:\Jake\User Doc...	<input type="button" value="Add..."/>
iGPRDA_2.pdf	27.8 KB	02-Jan-2020	W:\Jake\User Doc...	<input type="button" value="Remove"/>
iGPRDA_3.pdf	27.8 KB	02-Jan-2020	W:\Jake\User Doc...	
iGPRDA_4.pdf	27.8 KB	02-Jan-2020	W:\Jake\User Doc...	

It is recommended that you do not untick the 'Delete iGPRDA attachments after import'. If unselected it is down to the practice to manually remove any exported attachments out of the folder location configured by your health board.