

# DocuTrack 7.1 SP11

## Customer Release Notes

### Highlights:

This release focuses on product performance and reliability. Reliability required making substantial changes to the document viewer, so please be cognizant that some of the viewer's tools, options and dialogs have changed from the previous versions.

If upgrading from 7.1 SP# to 7.1 SP11, enhancements/new features include:

**Mediprocity Secure Messaging** – Full Mediprocity feature options within the messaging dialog.

**Document Print Preview** – Print preview dialog full functionality

- Print document auto defaults with
  - Last print options selected (with barcode & annotations)
  - Last printer used (no need to reselect)

#### Document Workspace

- Hotkeys added for *Fax button* (Ctrl+T) and *Scanner button* (Ctrl+O).
- Copy document dialog
  - New option to copy specific page(s)
  - New option to load copied documents into new tabs

#### Viewer

- Pop-up annotations support bold, italics, strikethrough, etc. font properties, improved resizing of all annotation types, improved usability.
- Enhanced scrolling within the viewer (including page-up and page-down keys functionality)

**Unified Search** – DeliveryTack section will now display driver name, cell phone #, ETA of delivery and location

of driver vs stop location

If upgrading from 6.6.X to 7.1 SP11, enhancements/new features also include:

**Folder based Workflow** – including real-time document count, locked by indicator, easy drag & drop folder assignment

**Viewer (New)** – due to client crashes and the current toolkit announcing end of life, the viewer has been replaced with a more reliable viewer toolkit

**Document Workspace** – new look and enhanced navigation with scanner option

**Unified Search** – provides a quick multi-product search option for “Where’s my med?”

**eRX data** – ability to see the entire eRX message in a dialog

**CloudFax** – optional tag fields added (tokenized values) – improves department/business unit cost breakdown

**Logix Folders** – including real-time count

**Logix Tasks** – quick launch for workflow/follow-up documents.



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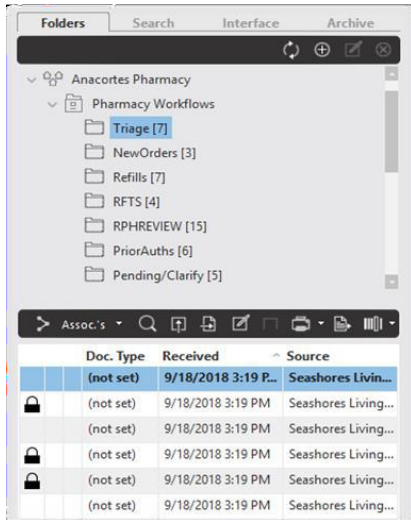
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## Notes:

In DocuTrack SP 11 we can address the document file size issue you experienced in SP 10. We have a process that will go through each of your documents that were created in the SP 10 version and will optimize/shrink them. This will help save on disk space, make documents quicker to load in the future and eventually faster to archive. This process will run in the background only during early morning hours and should not be noticeable to any end users.

# Enhancements

## Folder Based Workflows

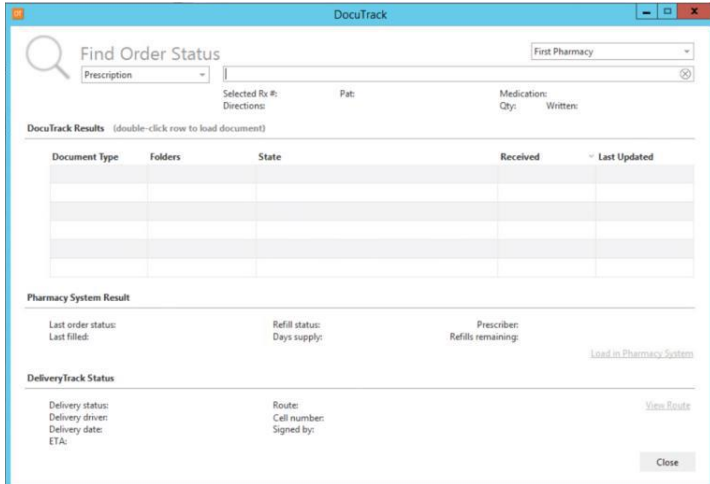


Folders based workflow feature will replace Search Folders for most Pharmacy workflow situations. A few of the many benefits include:

- Document Counts will display behind Folder names
- Documents may exist in multiple folders
- Documents lock icons will display in folder results (not search folders results) and are dynamically updated
- Document lists populate and save & next operations are more performant
- Using Drag & Drop feature, documents can be dropped onto new Folder assignment. Multi-selected documents (from a Search Folder) can be moved to a Folder
- Easy setup, with options to set default columns and display settings
- Document List allows Folder criteria to be viewed in a column (select "Folder" option in the column selector).
- Real Time Status Viewer can be configured to display Folders and or Search Folders.
- Folders will return "most recent" documents when configured with "most recent to oldest"

Search folders will continue to be available to support document list to show all manifests with zero RX associations.

# Unified Search



Unified Search provides a quick way to answer the “Where’s my med?” question. It introduces technology that enables a simple and fast way to look up *Prescriptions*, *Patients*, *NCPDP messages* or *Facility* records. Once a record is selected, the most recent documents, the Pharmacy Management System status *and* DeliveryTrack delivery status are quickly displayed. Additionally, if the Delivery driver is en route, the driver’s current location will display in a map view.

## NCPDP Script Standard V2017071 Ready

- DocuTrack 7.1 SPX has been enhanced to support incoming (NCPDP) 10.7 electronic prescription and the additional messages added in support for the new standard
- eRX (electronic prescription) XML data can be fully viewed by selecting a macro, which will load a dialog displaying all data

## Document Workspace Enhancements (7.1 SP11)

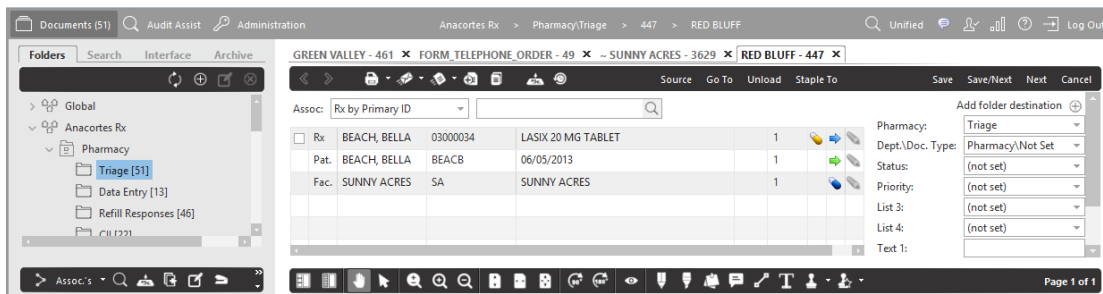
- **Mediprocity Secure Messaging Dialog:** User will now experience current Mediprocity functionality plus have access to all the on-line Mediprocity features including SureSent orders, Multi-user team accounts, Secure Forms, etc.
- Document viewer improvements, enhancing annotations and form fill.

## Axys Form Fill Enhancements (7.1 SP11)

- Form Fill has been enhanced to recognize Axys association data. When migrating to the new Axys Pharmacy management system, existing forms will function without rewriting or reconfiguration.

## User Interface updates (7.1 SP10)

- Document Workspace toolbar icons have been updated to increase visual clarity



## Document Workspace Enhancements (7.1 SP10)

- Copy dialog offers the option to select page range to copy and can be loaded into new tab
- Hotkeys to (Ctrl+T) Transmit/Fax and (Ctrl+O) Optical Scanner are now available
- Print Preview dialog will now preview pages selected

## Viewer (7.1 SP10)

- Pop-up control now supports multiple font settings (i.e, bold, italicize, strikethrough, underline and font size)
- Resizing of annotations has been improved
- Annotations with non-default borders, will now correctly resize and display all text
- An issue with copy/paste of popup note replies greater than two levels deep has been resolved
- All users have the option to Right Click “optimize” documents

## Viewer (7.1.5+)

Viewer has been enhanced, to provide users a more stable, robust document workspace to more efficiently complete daily tasks. This was accomplished by replacing the Viewer with a more up to date toolkit. The new toolkit resulted in a few differences in behavior. These are noted in the “DocuTrack 7.1 SP10 Viewer Known Differences.doc”. Please take time to review.

Listed below are a few Document Workspace/Viewer enhancements:

- Delete key will delete unsaved annotations.
- Text entered in annotations will not disappear
- Printing options recalled from previous print job (reselection no longer needed)
- Pop-up notes open/closed state saved
- Annotation color and border properties in a dialog (document resize no longer occurs)
- Client crash (due to memory access issue) resolved
- Added stability when navigating between document tabs and workspaces

- Loading documents are more performant
- Added stability when unloading documents

## System Enhancements

### 7.1 SP11

- FaxCore ev6 (REST based) API added.
- Reduced document file size growth
- New DirectConnect Interfaces:
  - Yardi (Assisted Living software, sending prescription and census communications)
  - iCareManager (Assisted Living software, sending prescription refill requests and other prescription communication)

### 7.1 SP10

- Sources not used in the past 180 days, can be marked as inactive improving search performance
- Database enhancements added to reduce database size and may improve stapling performance
- Mass Fax failure notifications now contain department to aid in locating failed documents
- PDF4Net and Aspose toolkit operations replaced

### Pre 7.1 SP10

- The CloudFax interface optional tag field has been updated to use tokenized values that include the business unit name, business unit ID, and the department name to make cost assignment by pharmacy or department easier
- New SourceType: eRX
  - This can be used to route eRX documents
  - And set Incoming Document Inactivity alerts
- Mediprocity's API (version 4.0) implemented with this release (this does not include new Mediprocity features)
- New Third Party integrations:
  - Secure Forms (Insert document)
  - CareServices LLC "TracRx" (Easy button)
  - Point Click Care (Insert document)
  - Sushoo Direct Connect Interface (EMAR application)
- New system alert added "Logged in User count" to trigger when a specified number of users have logged into DocuTrack
- FrameWorkLTC: Refill submission error codes will display text value
- Archive Searches are more performant and will load documents with missing source types
- The Archive Search workspace now has a "Search By" drop down field in the 'Limit results to' section that queries specific areas of archived data (Associations, Document Data and Document History)
- Folder Alerts will trigger when a document is older than X time
- Point Click Care is now an available Direct Connect interface
- CareMerge is now an available Direct Connect Interface

- eRx documents will ignore collation rules during document import and always keep pages together
- Dynamic and static PDF XFA forms will now be converted to standard Acro-Forms when received into DocuTrack
- File optimization throughout the product has been updated and made more effective
- DIRECT Secure Messages containing attached ZIP files that contain PDF attachments will have the PDF attachments imported

# Fixes

## Document Workspace

### 7.1 SP11

- Viewer issues resolved for:
  - Form Fill
  - Annotations
  - Printing
  - Stapling
  - Faxing
  - Email
- Client crash issues resolved
- Fax dialog search performance
- Archiving no longer fails when document contains association
- Faxing/printing stapled documents no longer display text on top of text

### 7.1 SP10

- Stapling, unstapling and faxing of forms no longer include incorrect data from other form fields
- Login performance improved, by returning only document data user has permission for
- Search Filter text is now generated upon demand, not with each Folder/Search folder refresh.

### Pre 7.1 SP10

- Custom list now defaults to the correct list item when changing document types
- Save/Next now works when the Folders Tab is collapsed
- Save/Next now skips over locked documents in all situations
- Custom List sort ranking will be honored when viewing documents within a Folder
- Viewer issues resolved:
  - Multi-selecting page thumbnails will rotate all pages selected, not just the last one selected
  - Quickly switching between documents would sometimes cause the client to close
  - Documents with a large number of form fields load more quickly
  - Entire text will display within pop-up notes.
- Printing issue resolved (certain forms)
- Unloading document tab no longer closes the client



- Busy spinner and/or printer dialog will no longer be hidden behind client when in client in full screen mode
- PrimeCare searches will no longer prompt or return an error when an association has been made
- A QS/1 host remote site issue resolved allowing both Load NCPDP (electronic prescription) messages and WebConnect to function correctly
- Resolved an issue that may lock up the application when clicking “Cancel” button from the “Do you want to save” dialog
- Saved Searches will no longer cause the client to close unexpectedly

## Unified Search

### 7.1 SP10

- Now contains a minimize button
- Incorrect tooltips issue resolved

### Pre 7.1 SP10

- An issue was resolved where the incorrect medication name was populated for ancillaries
- DeliveryTrack delivered date will now display the time based on the client workstation

## System

### 7.1 SP11

- Discontinued prescription EMAR messages will now fully populate the template.
- Import issues resolved for:
  - Email attachments
  - Excel files

### 7.1 SP10

- Routing barcodes are now applied to Fax cover pages
- Documents with routing barcodes stapled to the original and assigned to the correct Folder assignment (defined in the import rule)

### Pre 7.1 SP10

- Document Import will now honor Folder assignments
- Document Import will now support email attachments that are base-64 encoded
- Issue resolved where Document Import Rule Folder assignment was not being honored
- Cloud Fax Caller ID is now a required field. This will resolve an issue where a missing caller ID would cause failed faxes
- ERX entity page associations will be remembered
- FaxCore outbound fax file extensions are now .pdf
- Resolved an issue where stapling a portrait page to a landscape page would cause the portrait page to have portions of the document cut off



- Insert eMAR inserts to a single business unit if the Pharmacy ID value is blank or ##### (this includes WebConnect calls)
- Logix/DocuTrack search step updated with a configurable SQL timeout value, to prevent query timeouts
- Resolved an issue where a Logix process was unable to get custom attributes from the association XML

## Components Updated

- Client
- Server
- Database

## Upgrade Requirements

- DocuTrack 5.5+
- DeliveryTrack 5.8.0+, recommended 6.3.1
- Logix 3.0 or 3.1
- Client:
  - Windows 10 or above
- Server:
  - Windows 2016 or above
  - SQL Server 2016 or above

## Notes

- 7.1 SP10 will not be supported for Windows 2008 R2/SQL Server 2008 (Server/Client) and Windows 7 (Client)
- Windows XP is no longer supported



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