# DocHub Release 1.1
# User Guide

Version 1.0

19 January 2024

# Contents

# Introduction to DocHub

**DocHub** is the document management solution designed by **Cegedim Healthcare Solutions** to support you in receiving, processing, filing and managing the workflow of documents, both physical and electronic, received by your practice.

The following overview shows the summary of a document moving through the **DocHub** process:

**Documents Received**
- Documents are received either physically or electronically:
  - Scan any physical document and save them to a drive on your local computer.
  - Save electronic documents to a drive on your local computer.

**Upload to DocHub**
- Log into **DocHub** and select **Upload files** to upload new documents to **Not filed**.

**Process the Document**
- Select a document to preview it.
- Complete **Information** tab to attach the document to a patient.

**Summarise**
- Either:
  - Summarise the document straight away or,
  - Workflow the document to be summarised later.

Supported media files include:

- .JPG and .JPEG
- .PDF
- .DOC and .DOCX
- .TIF and .TIFF
- .PNG
- .TXT
- .RTF
- .ODT
- .ODS
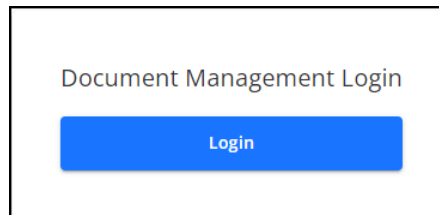- .ODP

# Logging in to DocHub

To log in to **DocHub**:

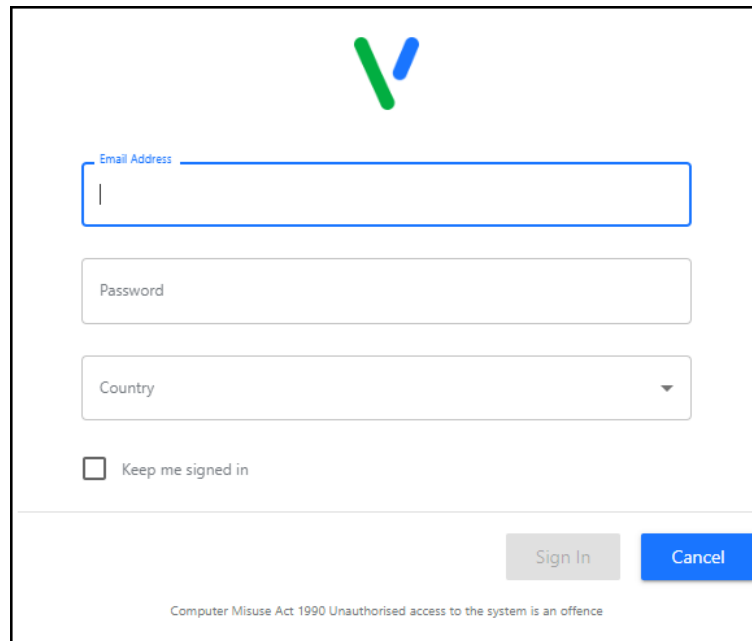1. From your Internet browser, enter http and press **Enter** on your keyboard.

    **Important** - **DocHub** is not compatible with **Internet Explorer**. Please use **Google Chrome** or **Microsoft Edge**.

2. Select **Login**:



3. The **Log in** screen displays:



   Complete as appropriate:

   - **Email Address** - Enter your registered email address.
   - **Password** - Enter your password.

    **Note** - If you are a **Vision 3** user, your registered email address is the one entered in **Vision 3** - **Control Panel** - **File Maintenance** - **Staff** - **Addresses** - **Communication Numbers**.
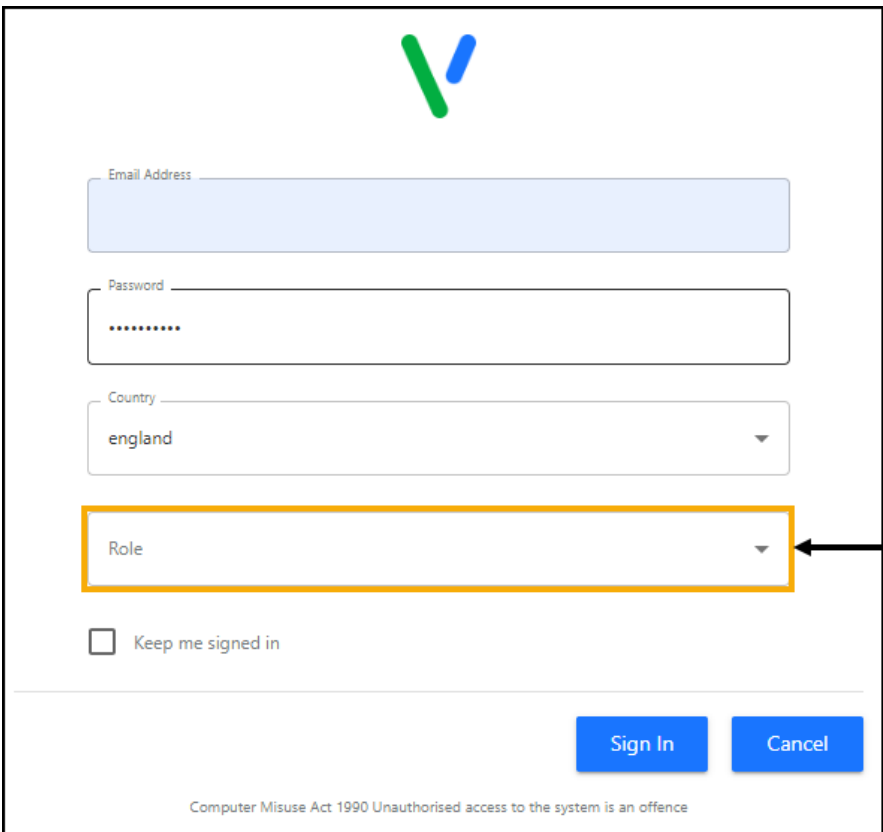
✏️ **Note** - If you are using **DocHub** in a shared care setting, your username and password is set up by your system administrator.

4. Select **Sign in** Sign In .

5. If you have multiple roles set up in **DocHub**, for example, if you work for more than one practice, or a practice and a federation, you must now select the appropriate role for this session:



6. Finally, select **Sign In** Sign In again to display the **DocHub Home** screen.

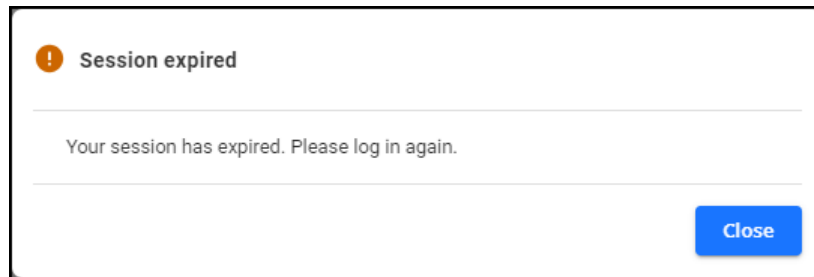✏️ **Note** - On start up **DocHub** displays the **Not filed** folder by default.

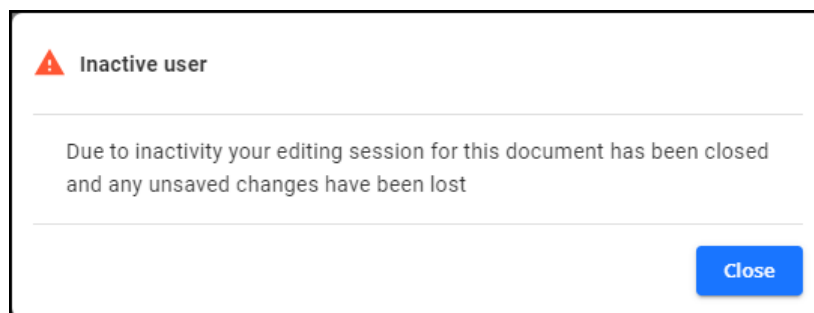➡️ See **Navigating DocHub** on page **10** for details.

## Session Expired

If you are logged in to **DocHub** for over eight hours, you are automatically logged out. You are presented with a warning '*Your session has expired. Please log in again.*':



To log back in simply select **Close** [Close] and log in as normal.
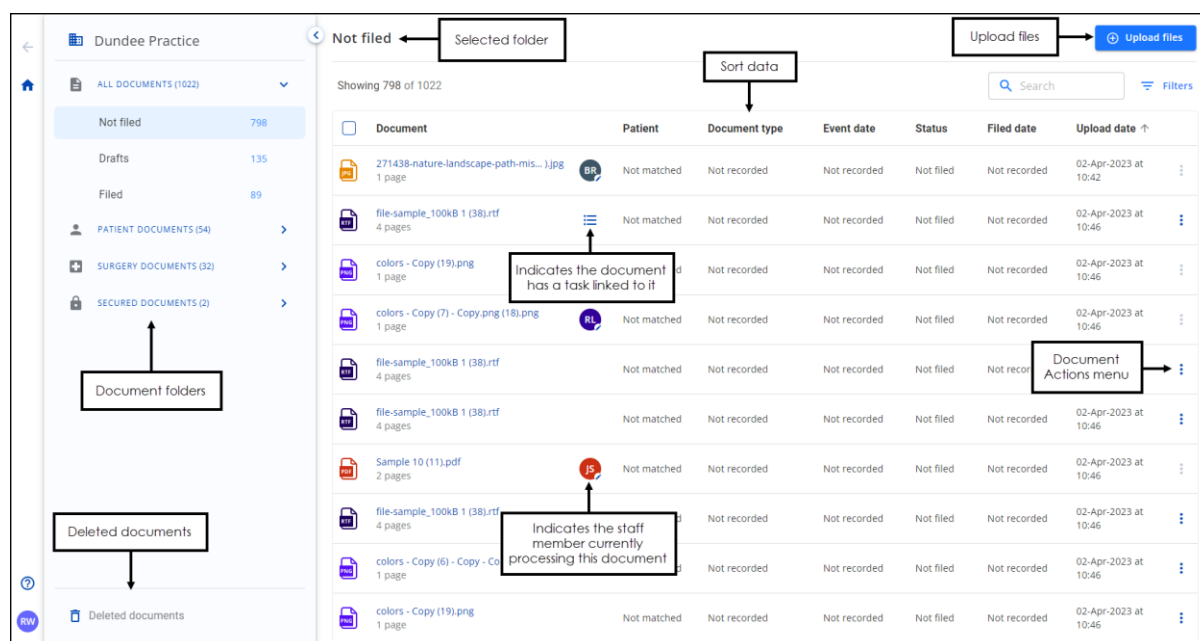
## Inactive User

If you are inactive for 30 minutes while editing a document in **DocHub** the **Edit** screen closes and unsaved changes are lost. You are presented with a warning '*Due to inactivity your editing session for this document has been closed and any unsaved changes have been lost*':



Select **Close** [Close] to continue to use **DocHub**.

# Navigating DocHub



See **Uploading Documents** on page **13**, **Processing Documents** on page **17**, **Viewing Filed Documents** on page **44** and **Document Actions Menu** on page **51** for details.

# Auto Refresh

The **Not filed** and **Drafts** folders automatically refresh when a new document is added. A new document notification displays at the bottom of the screen:

## *Refreshing Document Lists*

You are notified of new documents in the in the following way when they are added to the **Filed**, **PATIENT DOCUMENTS**, **SURGERY DOCUMENTS** and **SECURED DOCUMENTS** folders:



- **n document added in Patient documents**  -

  Where *n* is the number of new documents added. Select **Refresh**  to refresh the document list.
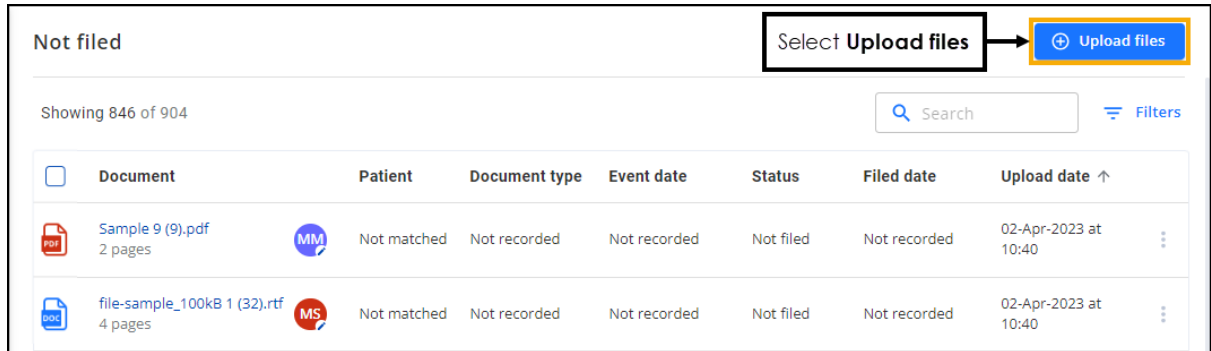
- **A new document has been added to Patient documents**

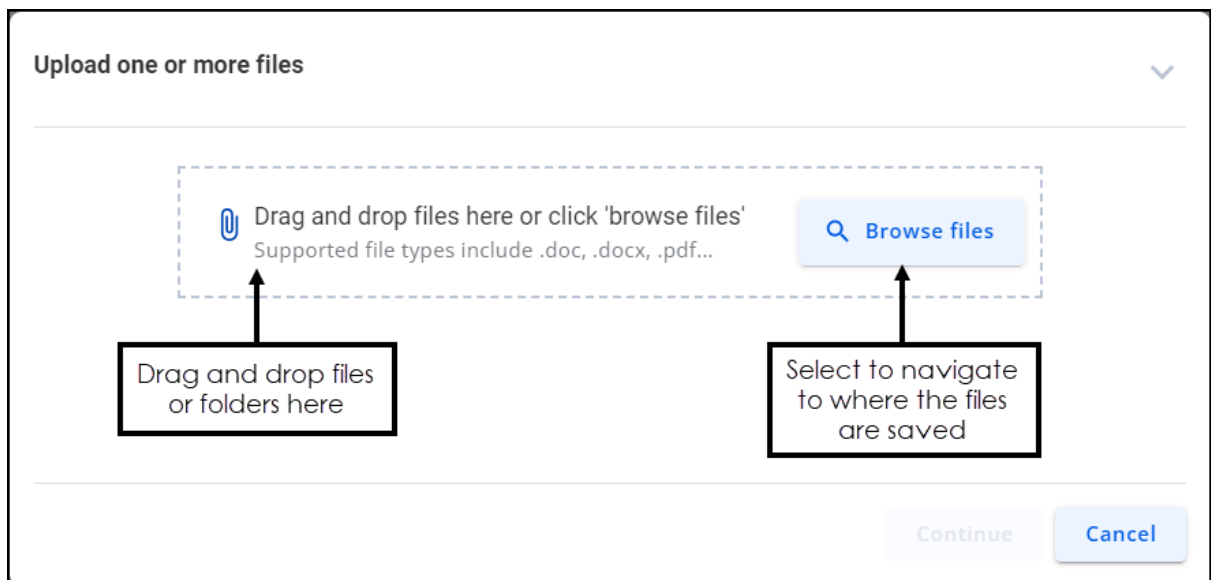   - Select **Refresh**

   to refresh the document list.

# Uploading Documents

It is quick and easy to upload a document from your local computer into **DocHub**:

1. From **DocHub**, select **Upload files**  [⊕ Upload files]:



2. The **Upload one or more files** screen displays, either:



- Select **Browse files**, navigate to where you saved the documents, select an entire folder, or individual files and select **Open**, or,

- Open your **File Explorer** and drag and drop the file(s) or folder required on to the **Drag and drop files here** section.

3. The documents start uploading. You have the opportunity to cancel the upload, select **Cancel** ✕ against individual files or **Cancel all** ✕ Cancel all if you have uploaded files in error:
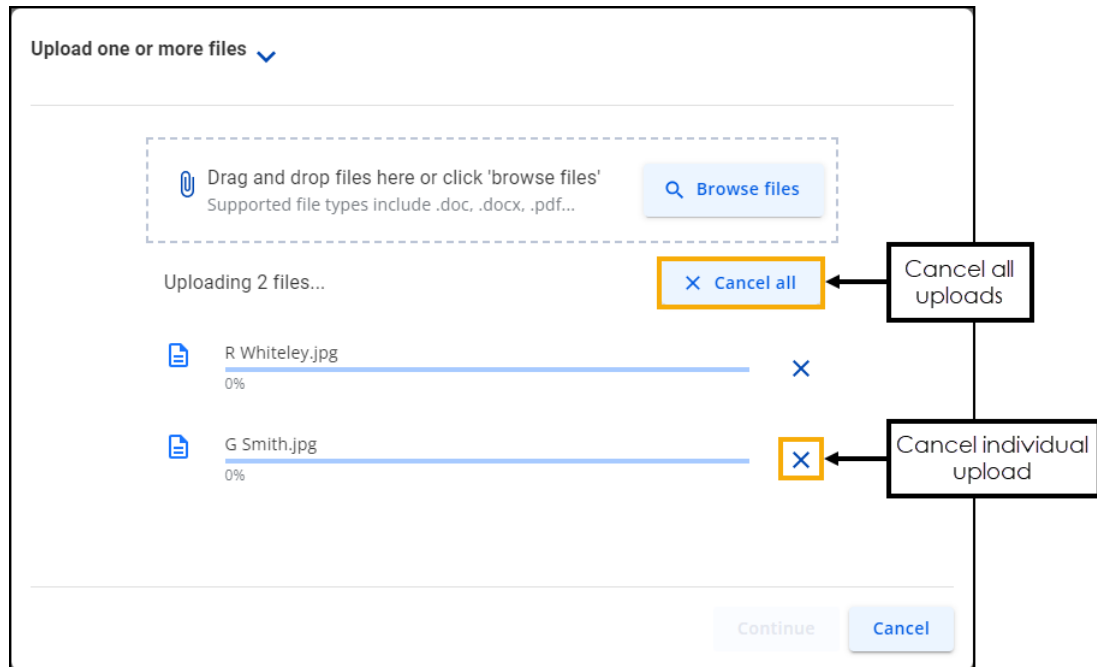


4. Once uploaded, you have the opportunity to delete any documents not required, select **Delete** 🗑 against individual files or **Delete all** 🗑 Delete all if you have uploaded files in error. Once you are happy with the documents uploaded, select **Continue**:
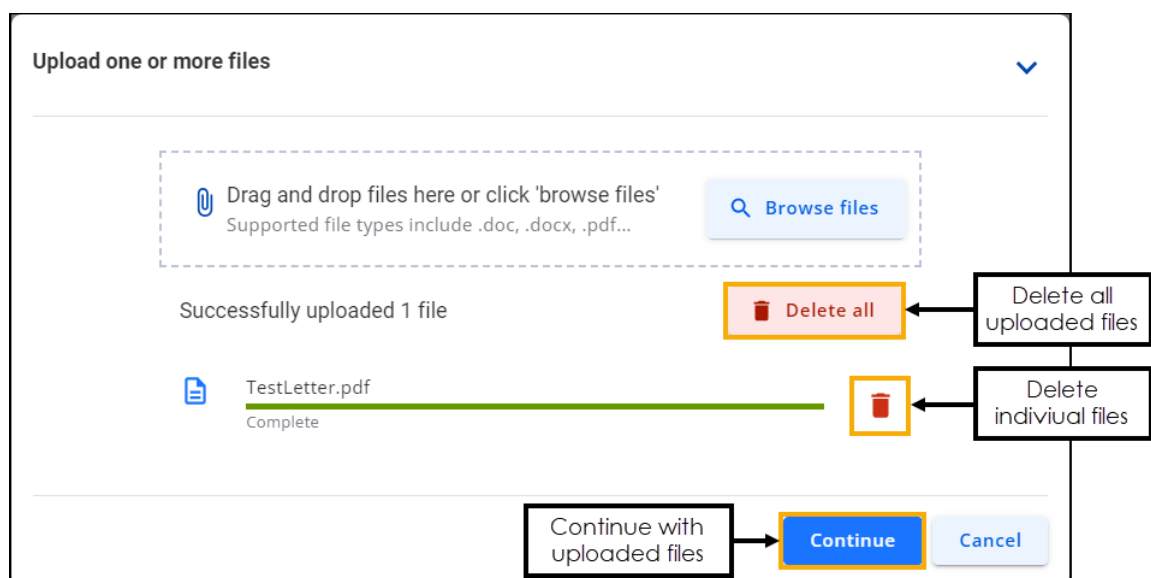


5. The uploaded documents automatically display in your **All Documents - Not filed** folder and are now ready for processing by any member of staff.

# Failed Uploads

If **DocHub** failed to process a document for upload, the number of failed uploads display and the individual files are highlighted in red:
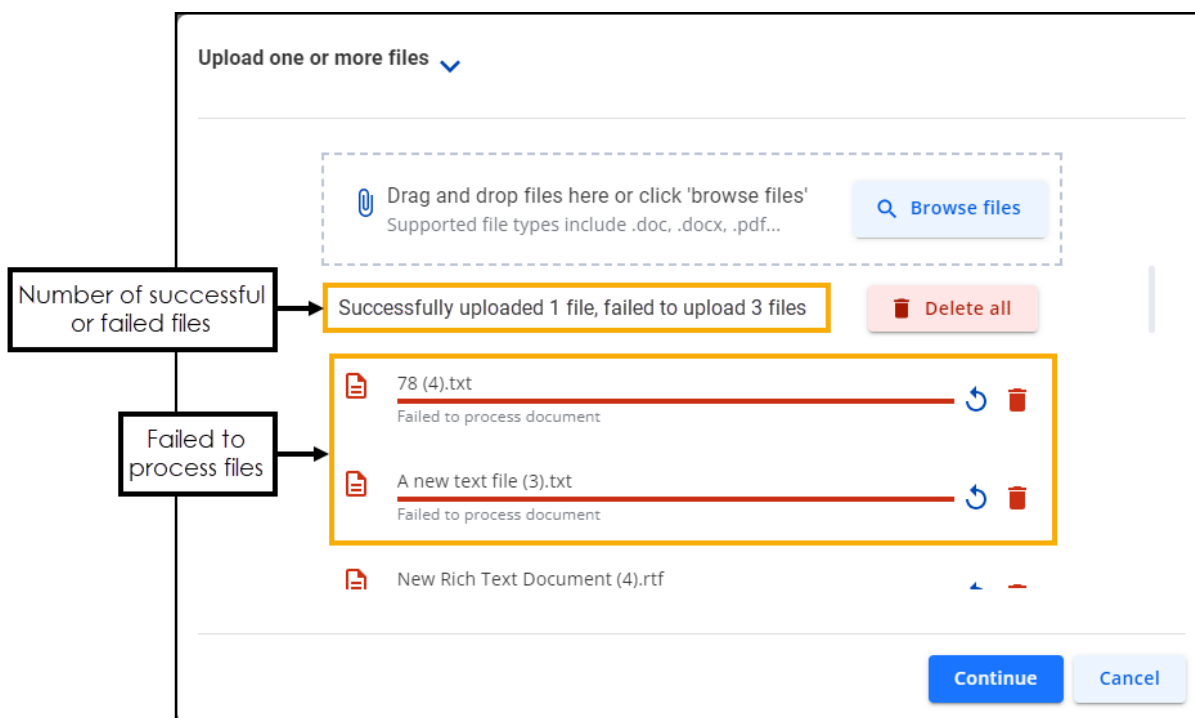


Select **Continue** to upload the successful files to **DocHub**.

# Optical Character Recognition

**DocHub** uses Optical Character Recognition (OCR) to convert scanned documents into searchable PDF files. When the OCR process is running the

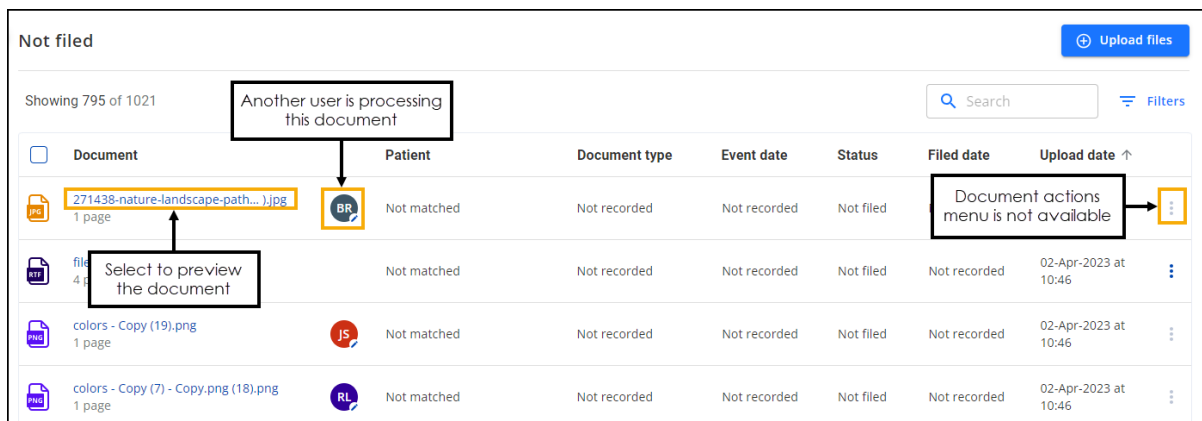**OCR in progress** [OCR] notification displays.

 See **Processing Documents** on page **17** and **Using Filters in DocHub** on page **57** for details.

# Concurrent Users

**DocHub** displays the initials of the person who is processing the document,

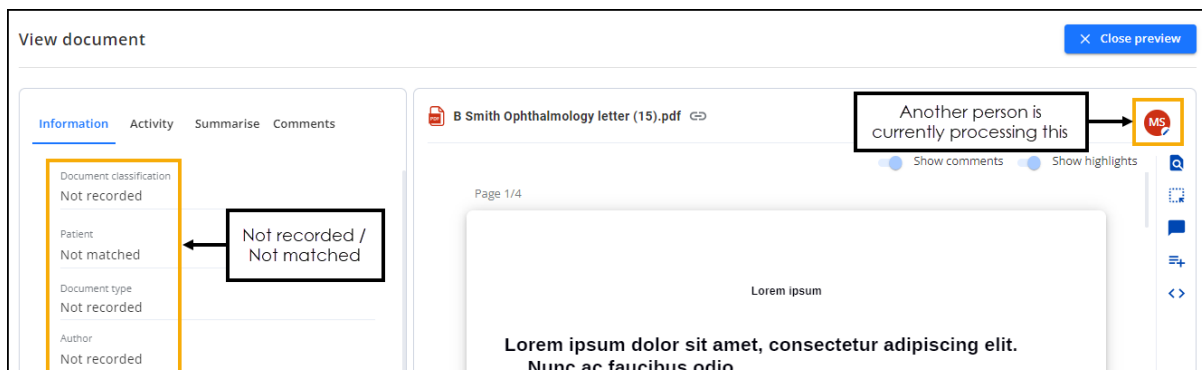**Document actions** ⋮ is unavailable however you can select the document name to display a preview:



---

🖊 **Note** - The **Document actions** menu is available, however the **Edit document data** and **Delete** options are not available.

---

From the **View document** screen, if someone is processing a document, their initials display at the top right of the screen. The **Information** tab displays also displays **Not recorded** or **Not matched**:



If the person processing the document you are viewing saves their changes a '*This document has been updated*' banner displays:



---
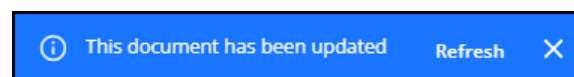
🖊 **Note** - This banner also displays if you are viewing a document when clinical codes and annotations are added or updated by other users.

---

Select **Refresh** [Refresh] to refresh the document to the most up to date version.

# Documents with Linked Tasks

**DocHub** displays **View Tasks**  when the document has a task allocated to it:



Select **View Tasks**  to view the allocated tasks:



Select the task name to open in **Tasks**.

# Processing Documents
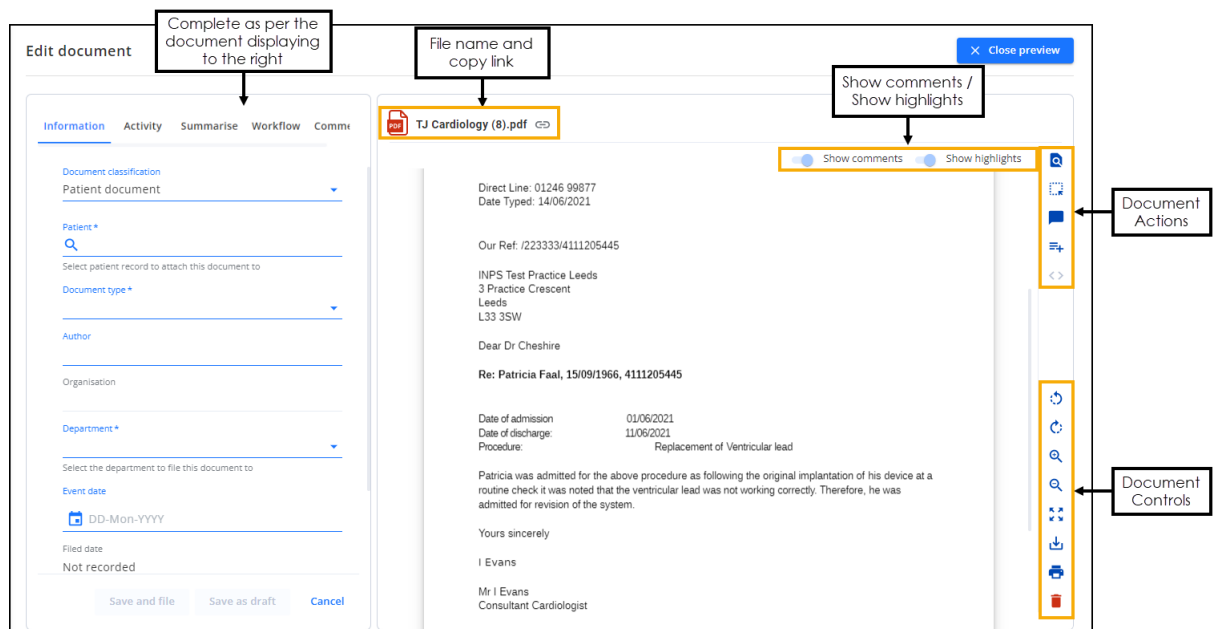
Regardless of how a document is received, you process them in the same way:

1. From **DocHub**, if necessary, select **Not filed** from the **Side Navigation Bar**.

   > 💡 **Training Tip** - **Not filed** initially displays by default when you open **DocHub**, with the earliest uploaded document displaying first. You can sort the documents into any order by selecting a column header to order them by.

2. Select the document name to display a preview and start processing the data:

The following controls are available to help you process a document:

## *Document Actions*

-  **Find** - Select to search for specific text in the document. The **Find** screen displays, enter your search criteria into **Search document**, the document highlights as you type. Use the arrows to scroll through the results:



-  **Highlight** - Select to highlight a block of text in the document. Hover over **Highlight** to select a highlight colour and then select and drag to create the highlight:



  Hover over a highlight, to view who created the highlight and when it was created.

   See **Adding a Highlight** on page **35** for details.

-  **Comment** - Select to add a comment to the document.

Enter the comment required and select **Send**  :



The comment is added to the document.

 See **Adding a Comment** on page **31** for details.

-  **Create Task** - Select to create a Task for this document. See **Creating a Task** on page **36** for details.

-  **Next page** - Select to move through the pages of a multi-page document.

## Document Controls

-  /  **Rotate left/Rotate right** - Especially useful for images, you can use this to rotate the document through 90 degrees at a time either clockwise or counter clockwise.

-  /  **Zoom in/Zoom out** - Select the **Minus -** to reduce the size of the document or **Plus +** to enlarge the document. The percentage value in the middle displays the changes you make.

-  **Full screen** - Select to display the document in a full screen format. See **Full Screen Mode** on page **38** for details.

-  **Download** - Select to download the selected document. To view your **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files displays.

-  **Print** - Select to print the document.

-  **Delete** - Select to delete the document. The **Delete document** screen displays, select the deletion reason, add any notes required and then select **Delete**:



The deleted documents are then stored in the **Deleted documents** folder for 14 days, after this time, unless they are restored, the documents are deleted from the system. To restore a document, see **Restoring a Deleted Document** on page **55**.

## Show comments / Show highlights

Slide the toggle to switch the comments and highlights **On**  or **Off** .

If there are no comments or highlights on the document the option is disabled .

## Share document

Select **Copy link to document**  to copy the document link to your Windows Clipboard, this can be useful if, for example, you want to share with a colleague:

3. You can now complete the document data using the following tabs:

- **Information** - Enter document and patient information to allow you to file and locate the document. See **Filing a Document** on page **23** for details.

- **Activity** - Select to view the document activity/audit trail, see **Viewing Document Activity** on page **26** for details.

- **Summarise** - Select to allocate clinical terms relating to this document. The first time you select the **Summarise** tab it is in Edit mode, after that you must select **Edit** to add or update any clinical terms. See **Summarising a Document** on page **27** for details.

- **Workflow** - Select to view the workflow items/Tasks linked to this document. See **Workflow Documents** on page **31** for details.

- **Comments** - Select to view the active and resolved comments on the document. See **Viewing and Resolving Comments on a Document** on page **33** for details.

4. Select **Close Preview** or  to return to the **DocHub Home** screen.

# Filing a Document
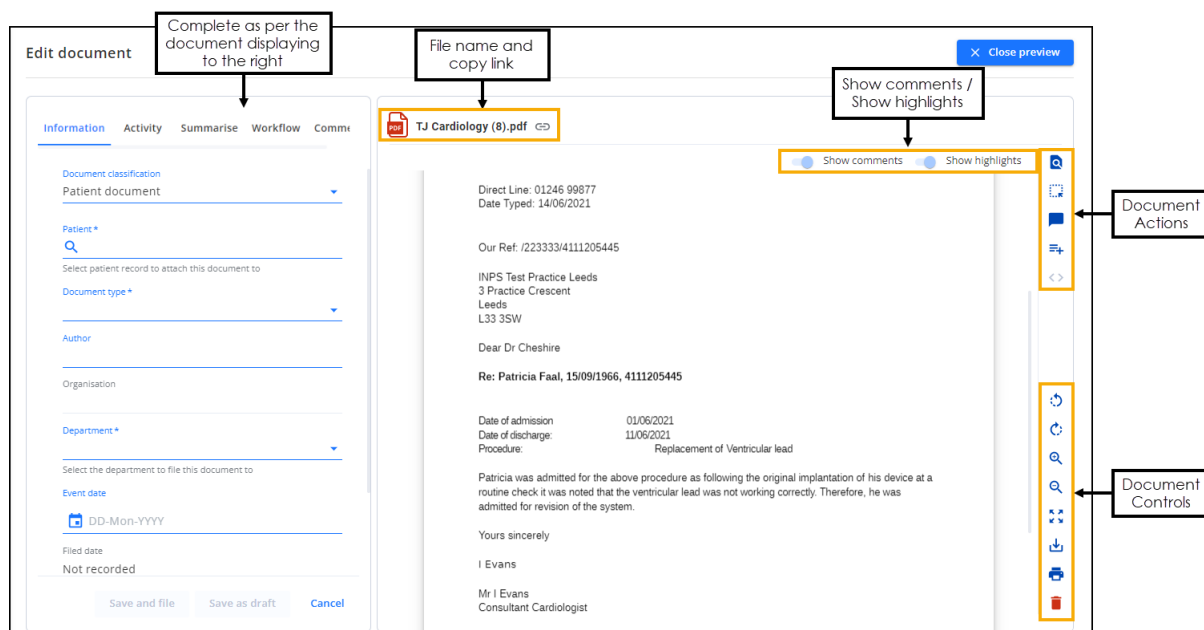
To file a document in **DocHub**:

1. From **DocHub**, if necessary, select **Not filed** from the **Side Navigation Bar**.

   💡 **Training Tip** - **Not filed** initially displays by default when you open **DocHub**, with the earliest uploaded document displaying first. You can sort the documents into any order by selecting a column header to order them by.

2. Select the document name to display a preview and start processing the data:

3. From the **Information** tab, you can enter document information to allow you to file and help you to locate a document:

---

![pencil icon] **Note** - Mandatory items are indicated by an asterisk **\***.

- **Document classification** - Defaults to **Patient document**, select and update from the available list if required.

- **Patient** (Required) - Enter the first few letters of the surname and forename and the smart search returns matching patients, the more you enter the shorter the list is:



You can also search for patients by:

- Birth Year

- Postcode

- NHS/CHI Number

Filter the search, if required, by **Active**, **Inactive** or **All** patients by selecting appropriately. Select the patient required.

- **Document type** (Required) - Select from the available list as required. These are linked to SNOMED CT terms so ensure you select the most appropriate document type.

- **Author** - Enter the name of the person that sent the letter.

- **Organisation** - Enter the name of the organisation that sent the letter.

- **Department** (Required) - Select the appropriate department from the available list. This determines where the documents are stored under **PATIENT DOCUMENTS**.

- **Event date** - Using the calendar, select the date of the event the document refers to.

---

![lightbulb icon] **Training Tip** - You can remove any individual selection using the **X** that displays when you hover over the end of each line.

---

Select either:

- **Save and file** - To save the details you have selected and file this to the patient's clinical record. The document is moved from **Not filed** to the relevant **PATIENT DOCUMENTS** folder (as set in **Department**).

- **Save as draft** - To save the details you have selected, but not file to the patient's clinical record yet. The document is moved from **Not filed** to the **Drafts** folder.

- **Cancel** - To remove all the details you have selected and leave the document in the **Not filed** folder.

4. Select **Close Preview** or  to return to the **DocHub Home** screen.
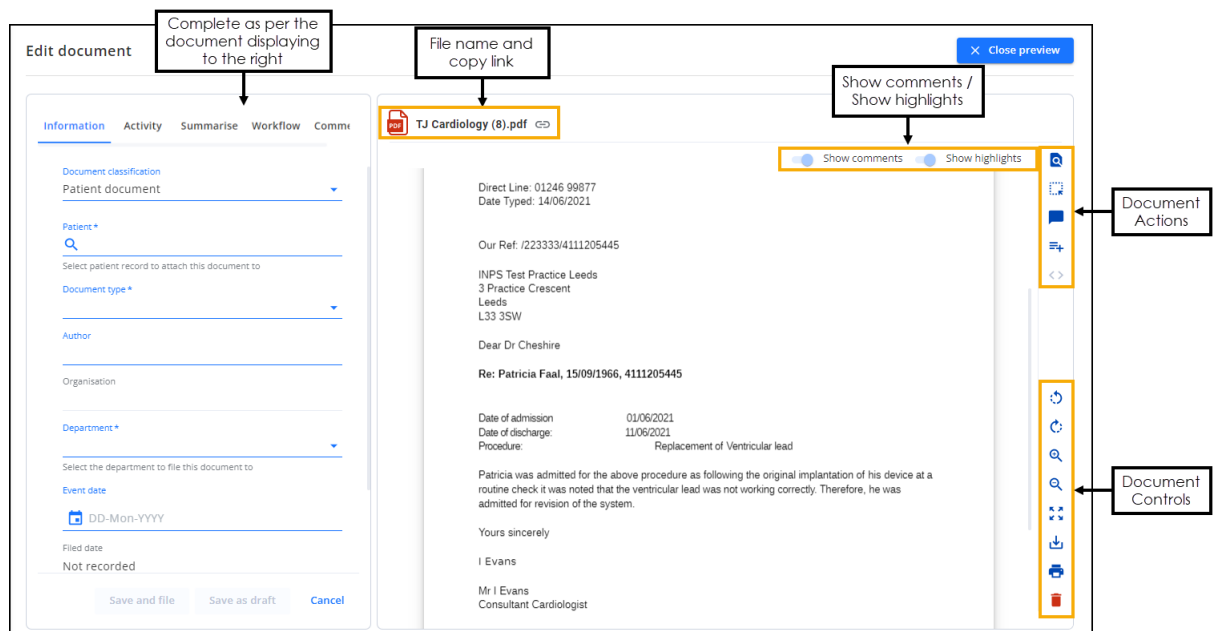
# Viewing Document Activity

To view the document activity:

1. From **DocHub**, search for the required document.

> **Training Tip** - You can sort the documents into any order by selecting a column header to order them by.
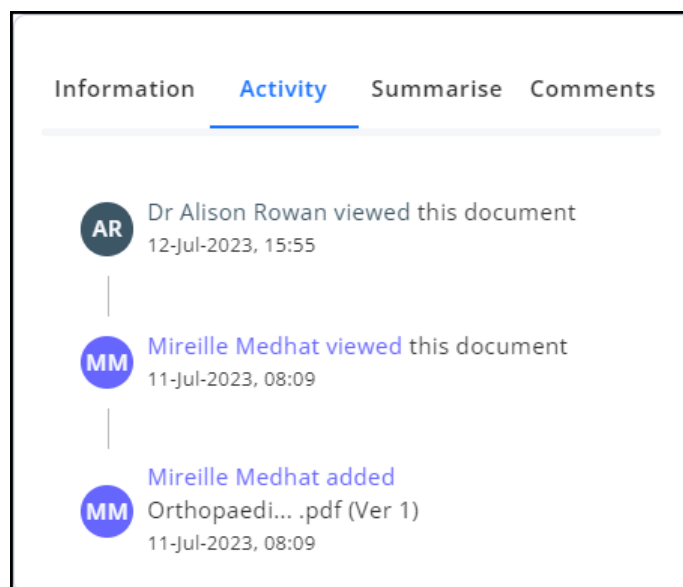
2. Select the document name to display a preview and start processing the data:



3. The **Activity** tab displays the audit trail of actions for this document, for example:



4. Select **Close Preview** or  to return to the **DocHub Home** screen.

# Summarising a Document

> ✏️ **Note** - Only available to **Patient Documents** as set in **Document classification**.
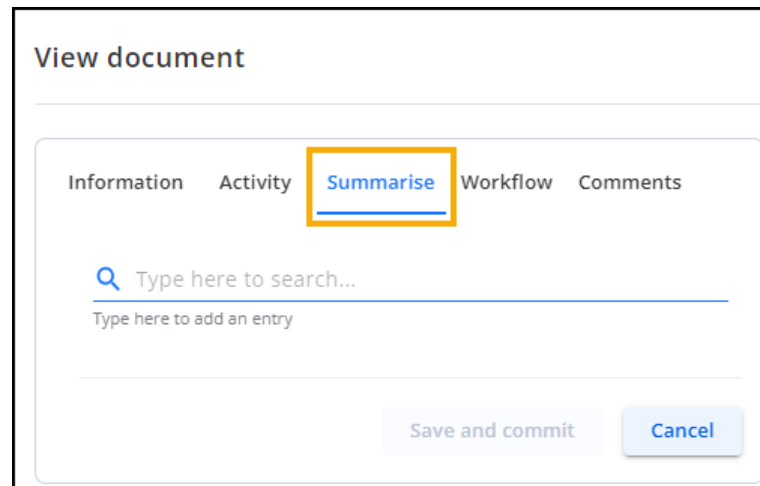
To summarise a filed document:

1. From **DocHub**, select **Filed** from the **Side Navigation Bar**.
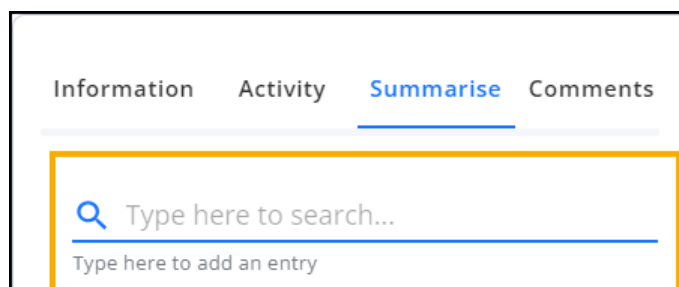
> 💡 **Training Tip** - You can sort the documents into any order by selecting a column header to order them by.

2. Select the document name to display a preview.

3. Select the **Summarise** tab and allocate clinical terms relating to this document. The first time you select the **Summarise** tab it is in edit mode, after that you must select **Edit** to add or update any clinical terms:



4. To add a clinical term, start entering the term required above **Type here to add an entry**:
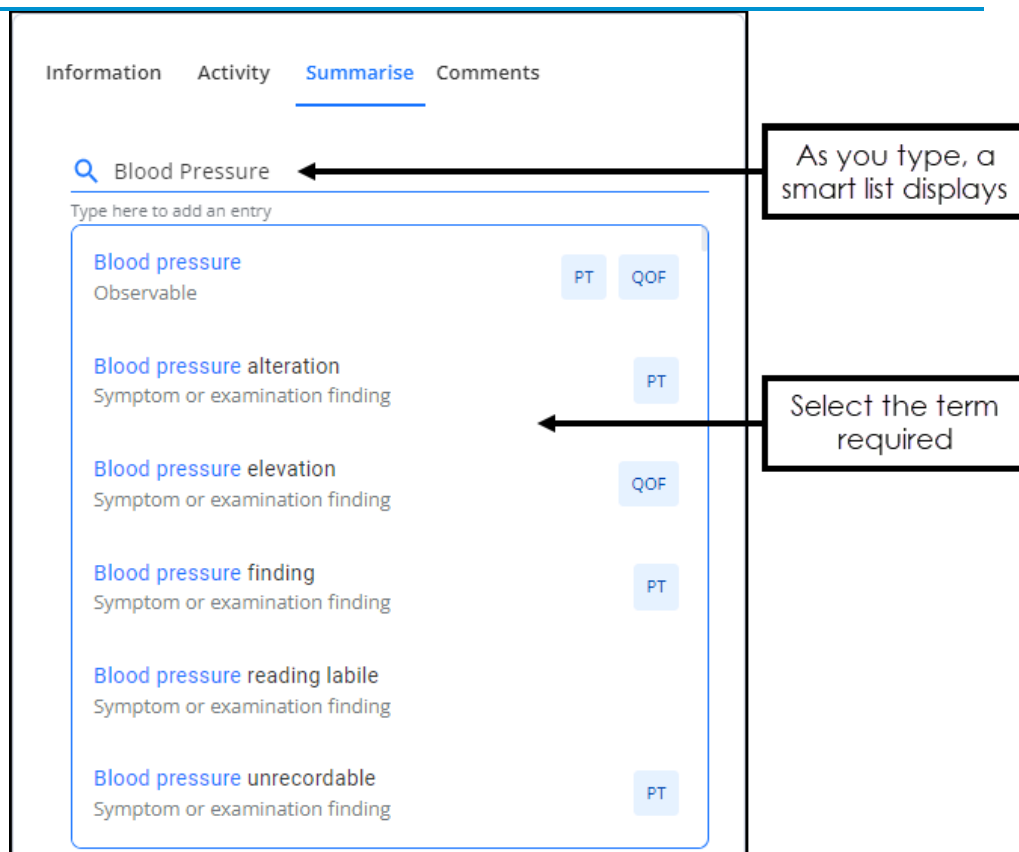


> 💡 **Training Tip** - If you have already added clinical terms to this document, you must select **Edit** [Edit] before you can add more.

5. Select the term required from the smart list:

💡 **Training Tip** - Standard Vision Anywhere short cuts apply here, for example, enter a Blood Pressure result to trigger a **Blood Pressure** add form with the **Systolic** and **Diastolic** completed.
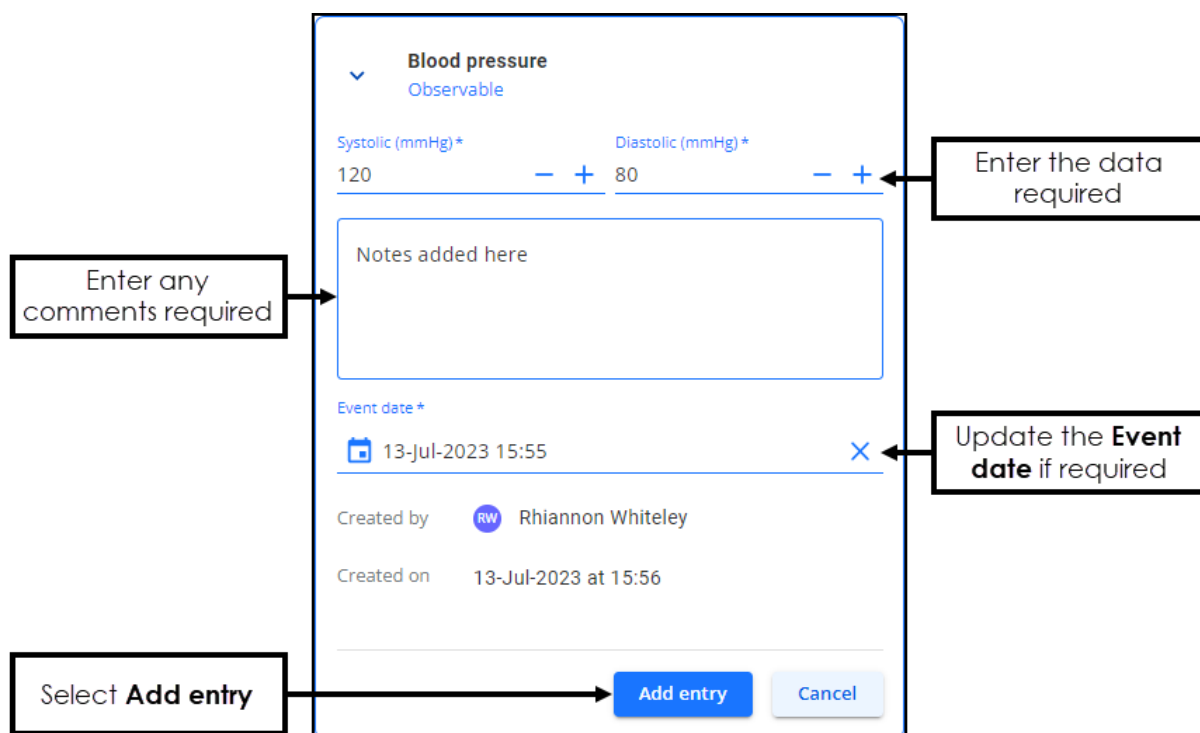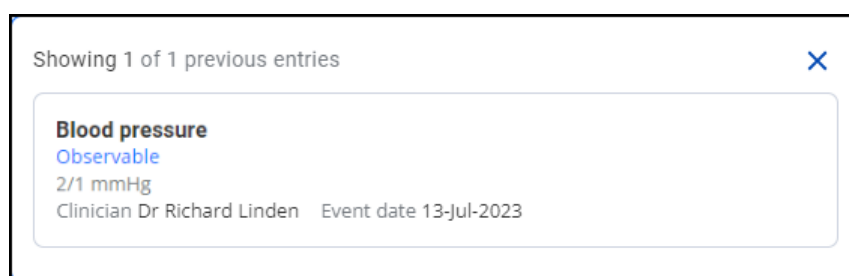
6. Depending on the clinical term selected, an appropriate **Add entry** form displays:



Complete as per the document you are summarising, the entry details depend on the clinical code you have selected.

*n* **Previous entries**  (where *n* is the number of entries) - This banner displays if there are similar records on the selected patient record. Select **View** to display the records:
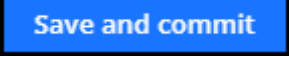


7. Select **Add entry** .

8.  Repeat from step **4** until all the clinical terms required and related comments are added:



---
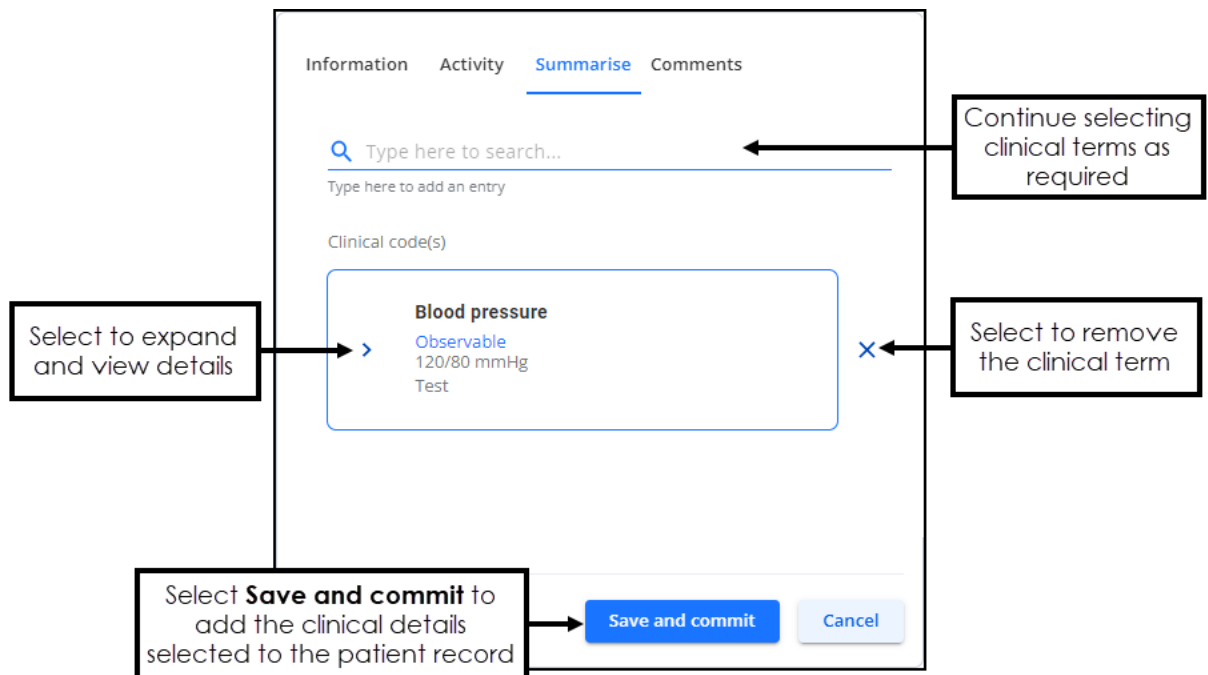
💡 **Training Tip** - Select **Clear** [×] to remove a clinical term from the document and the patient record.

---

9.  Select **Save and commit** [ Save and commit ] to update the patient clinical record.

10. Select **Close Preview** or [🏠] to return to the **DocHub Home** screen.

# Workflow Documents

**DocHub** works seamlessly with the **Cegedim Healthcare Solutions Tasks** application. The **Workflow** tab displays all Tasks linked to the current document, with the most recently created at the top of the list:
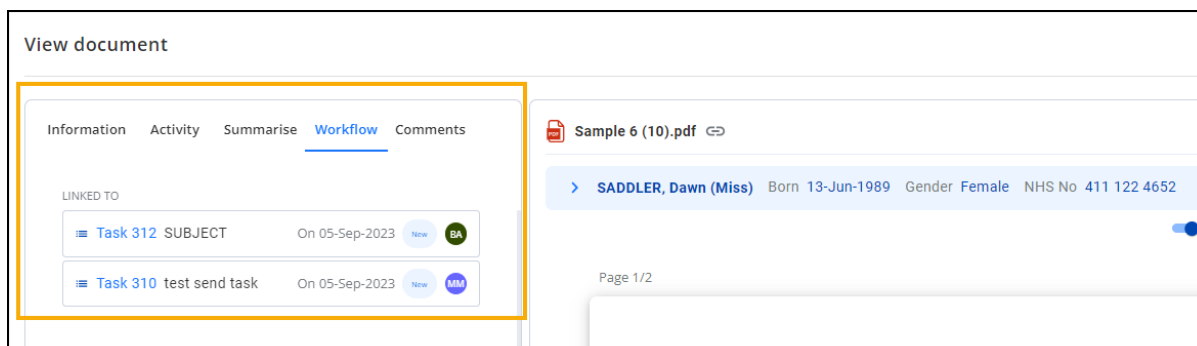


The following task information displays:

- Task ID

- Subject

- Created Data

- Status

- Assignee initials

To assign a Task to a document, see **Creating a Task** on page **36**.

Documents that have been through the workflow process display with **View Tasks** in the document list:

# Adding a Comment

To add a comment to a document:

1. Select **Comment** [icon] to add a comment to the document. Select in the document where you would like the comment, add the comment text required and select **Send** [icon]:
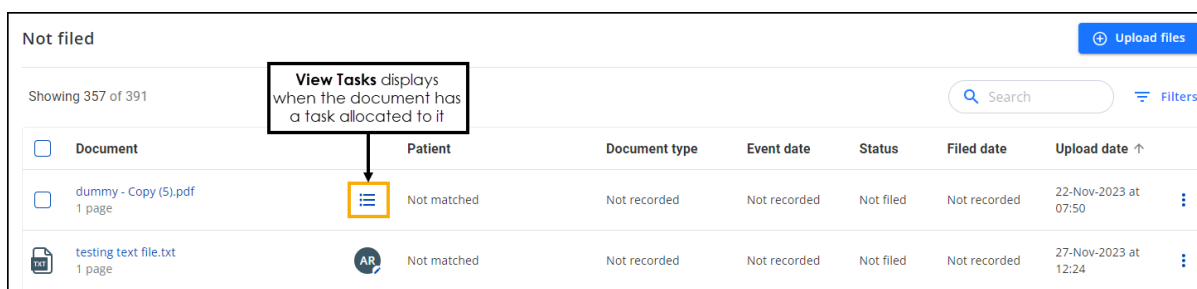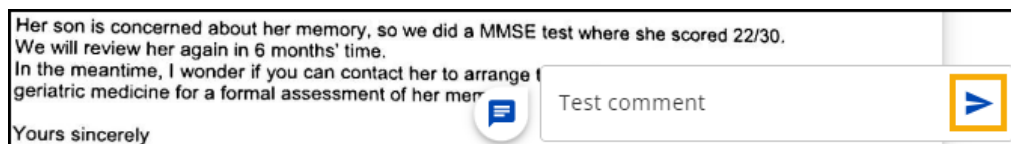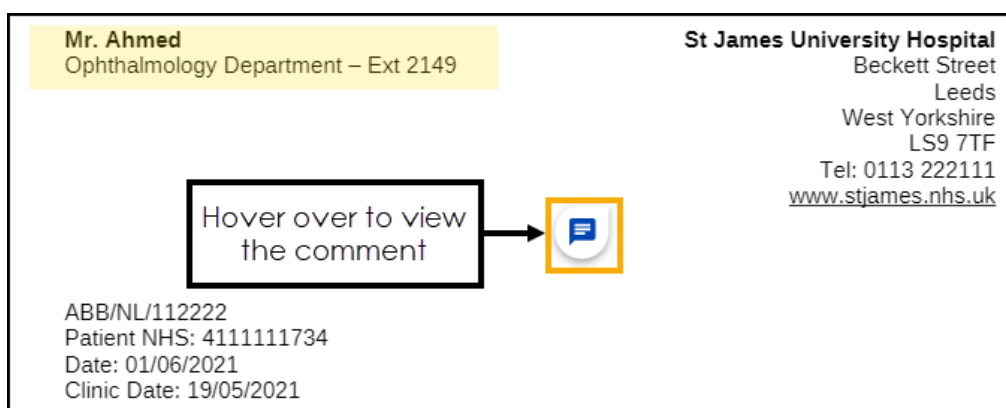
> Her son is concerned about her memory, so we did a MMSE test where she scored 22/30.
> We will review her again in 6 months' time.
> In the meantime, I wonder if you can contact her to arrange t
> geriatric medicine for a formal assessment of her mer
>
> Yours sincerely
>
> Test comment

The comment is added to the document.

To view an existing comment, simply hover over the **Existing Comment** icon [icon] on the document:

Mr. Ahmed
Ophthalmology Department – Ext 2149

St James University Hospital
Beckett Street
Leeds
West Yorkshire
LS9 7TF
Tel: 0113 222111
www.stjames.nhs.uk

Hover over to view the comment →

ABB/NL/112222
Patient NHS: 4111111734
Date: 01/06/2021
Clinic Date: 19/05/2021

The comment displays with the date and time it was added:

HM   Hams Mohamed   14-Jun-2023 at 13:58

adding a comment

ABB/NL/112
Patient NHS: 4111111734
Date: 01/06/2021
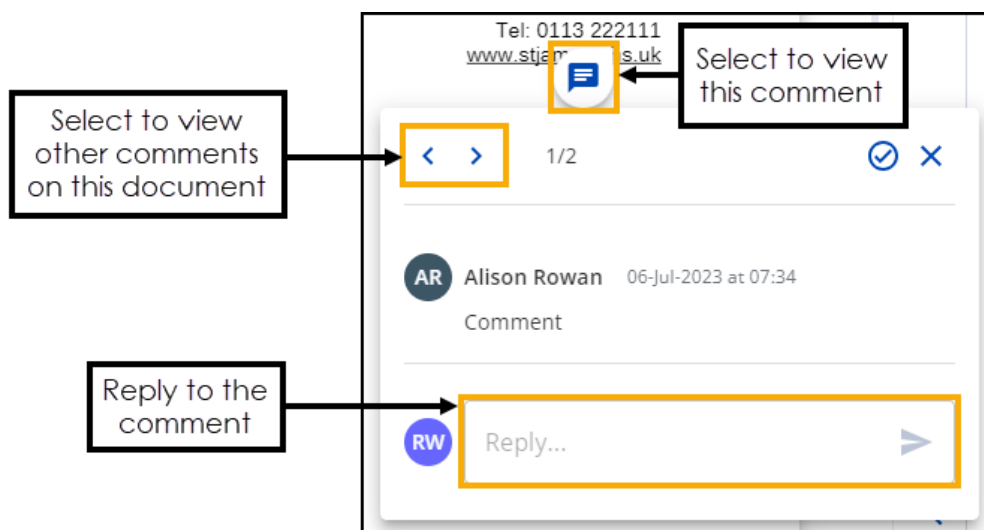Clinic Date: 19/0

View an existing comment

# Viewing and Resolving Comments on a Document

## *Viewing Comments*

To view comments on a document:

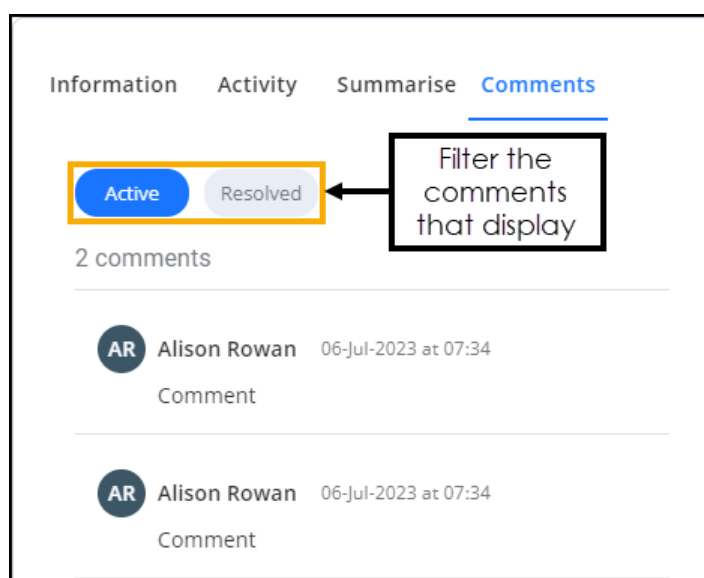When in **View document** or **Edit document** view, either:

- Select **Existing Comment** 💬 on the document. The comment displays:



If there are multiple comments you can use the arrows [< >] to view the next or previous comments in the document.
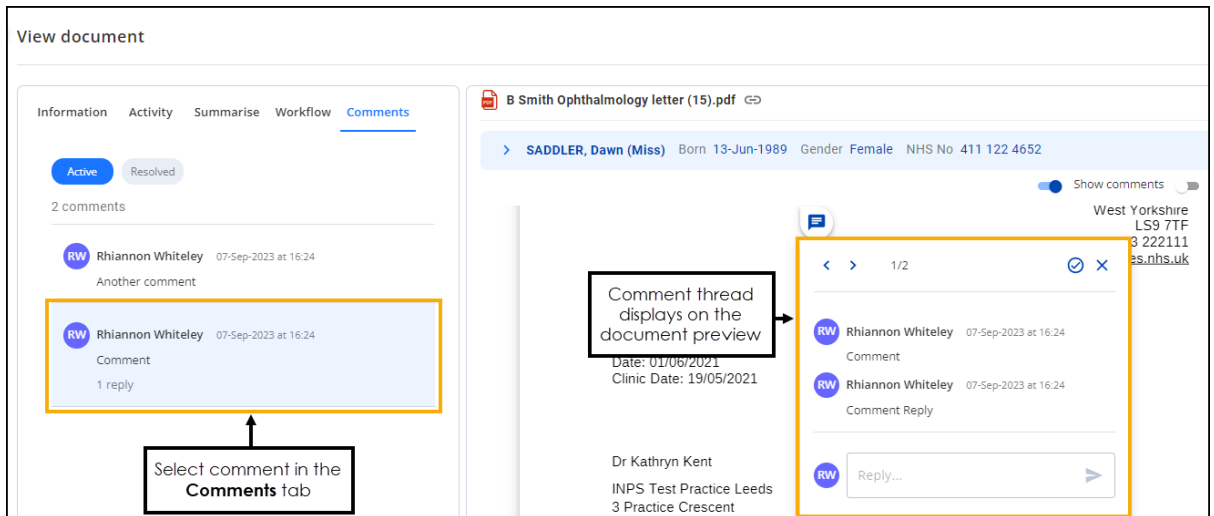
Enter your response in **Reply...**.

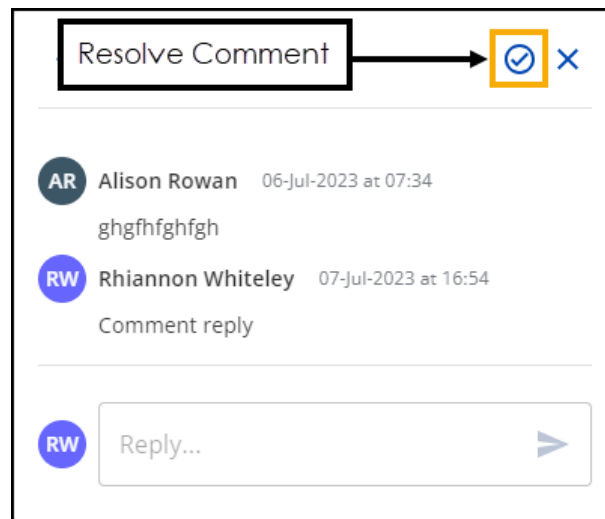- Select the **Comments** tab from the **Document data** section:



All comments in the document display, you can filter either by **Active** or **Resolved** comments.

Select the comment to view the thread on the document itself:



## *Resolving Comments*

You can easily resolve and remove comments from a document, simply, view

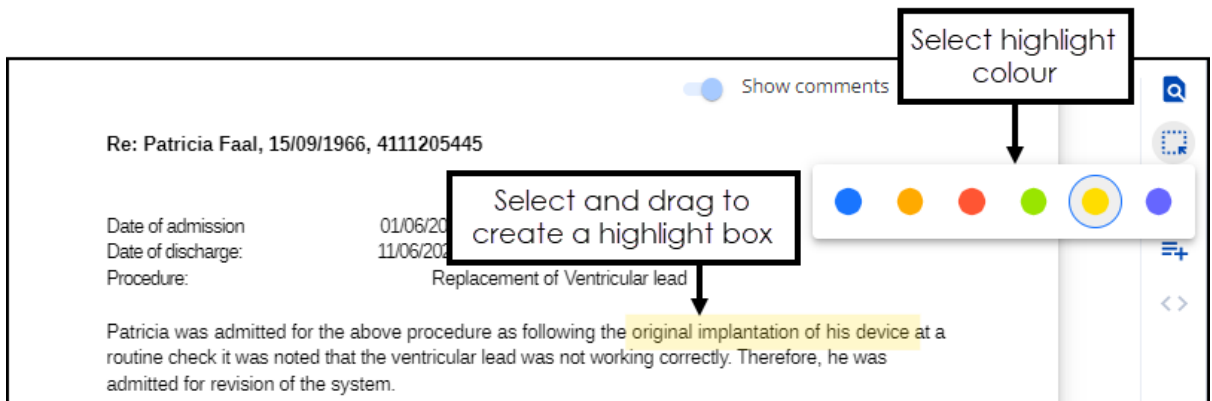the comment on the document and then select **Resolve** ⊘ :



Resolved comments can be viewed from the **Document Data - Comments** screen:
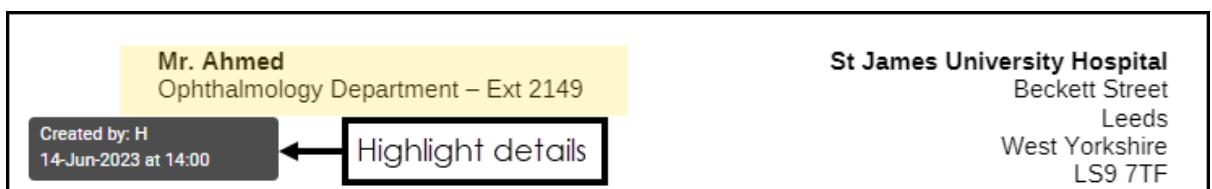
# Adding a Highlight

To add a highlight to a document:

- Hover over **Highlight** ⬚, select a highlight colour option, and then select and drag the cursor to create a highlight box:



- Hover over an existing highlight to display who created it and when:

# Creating a Task

To create a task for a document:

1. Select **Document actions** ⋮ at the end of a document row, in any document folder to open the **Document actions** menu:



2. Select **Create Task**.

3. The **Task** screen displays:

---

✏️ **Note** - The **Patient Details** section only displays for documents that are filed.

---

Complete as follows:

- **DETAILS**:

    - **Recipients** - Select the recipient of this Task, this can be one or more individual members of staff, yourself to act as an aid memoir or a staff group, simply start typing and a smart list displays to select from.

    - **Subject** - Enter a short description of the task, up to 30 characters.

    - **Category** - Select a category from the list provided.

    - **Due date and time** - Enter the date and time that this task should be completed by, using the format DD-MM-YYYY HH:mm, or select **Calendar** 📅 to open a date and time picker:

    

    - **Additional Notes** - Enter any additional notes.

- **LINKED TO** - Displays the details of the document that this Task is linked to.
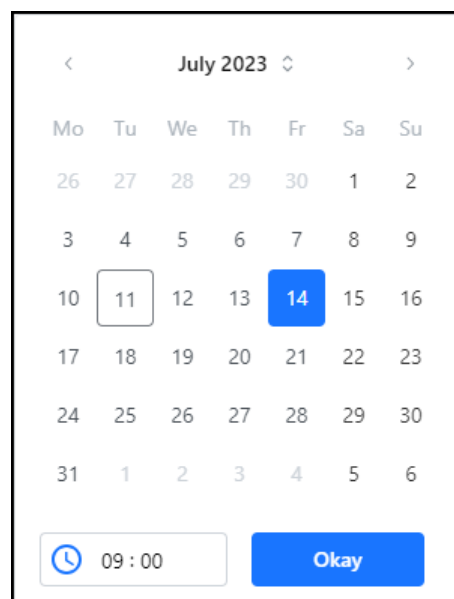
- **STATUS**:

    - **Priority** - Select from:

    - **Routine** - Tick if this Task should be marked as routine.

    - **Urgent** - Tick if this Task should be marked as urgent.

    - **Urgent when overdue** - Tick if the priority of this Task should increase when overdue.

- **Task contains sensitive information** - Tick to mark a Task as sensitive, if selected only the sender, recipients and system supervisors can see the full details of the Task.

  ⓘ **Important -** Ensure you do not include sensitive data in **Subject** as this may inadvertently be seen by unauthorised staff.

- **All recipients must complete** - If this Task is going to a group of recipients, tick to request they all complete the task as opposed to just one of them.

- **Notify me when complete** - Tick to receive a notification when this Task is complete.

4. Select **Send Task** to send the Task to the recipient.

A banner displays when the Task is successful:


Successfully sent TASK-133 for Clinical_letter (5).pdf ✕
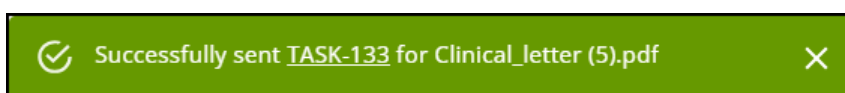
The recipient is notified of the Task in **Tasks**.

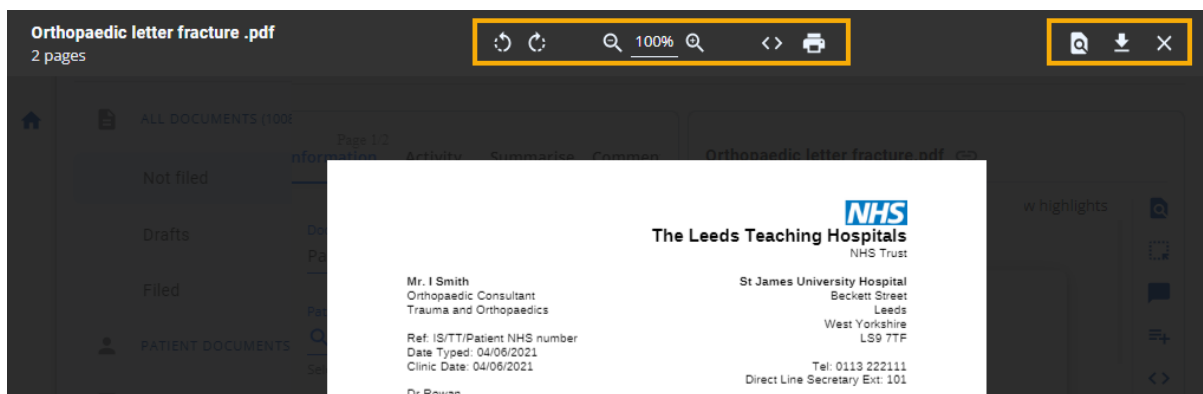Documents that have been through the workflow process display with **View Tasks** ☰ in the document list:

# Full Screen Mode

To view a document in full screen mode, select **Fullscreen**  from the document controls section:
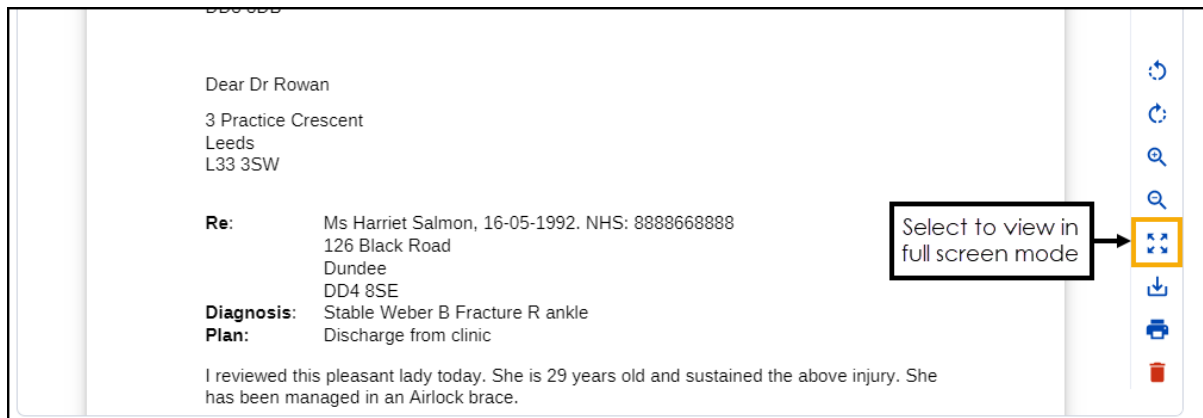


The document displays in full screen mode:



You have the following options:

-  **Rotate left/Rotate right** - Especially useful for images, you can use this to rotate the document through 90 degrees at a time either clockwise or counter clockwise.

-  **Zoom out/Zoom in** - Select the **Minus -** to reduce the size of the document or **Plus +** to enlarge the document. The percentage value in the middle displays the changes you make.

-  **Paginate/Scroll** - Select to either view a page at a time or be able to scroll through all pages.

-  **Previous/Next pages** - Only available if you have **Paginate** selected above, use the left or right arrows to switch between the pages that display.

-  **Print** - Select to print the document.

-  **Find** - Select to search for specific text in the document. The **Find** screen displays, enter your search criteria into **Search document**, the document highlights as you type. Use the arrows to scroll through the results:
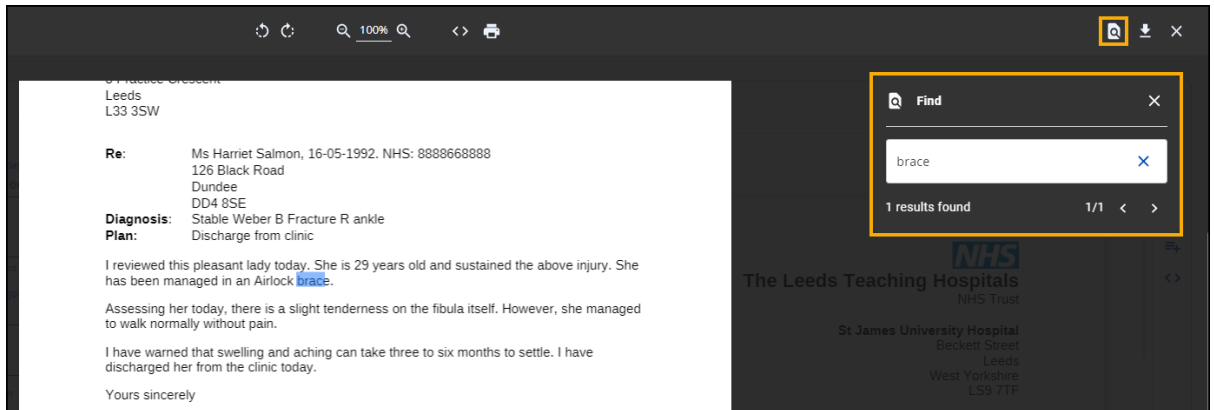


-  **Download** - Select to download the selected document. To view the **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files display.

-  **Close** - Select to close the full screen mode.

# Draft Documents
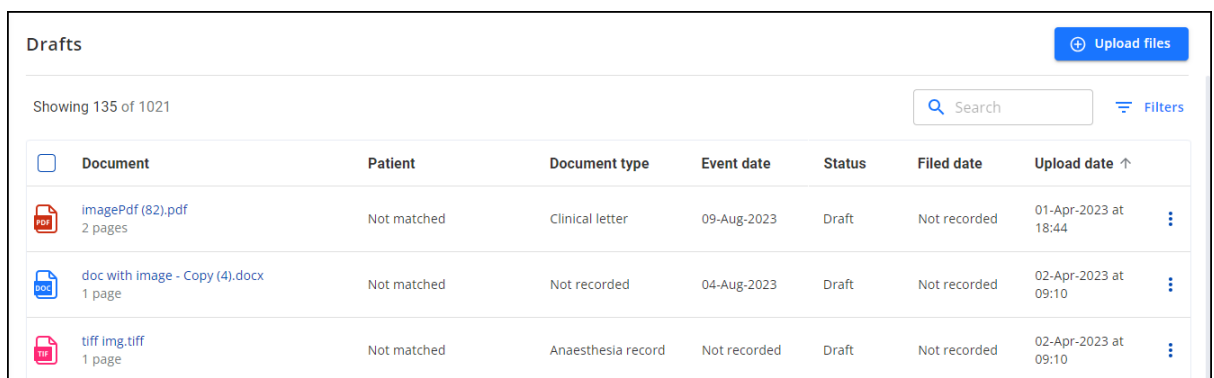
The **Draft** folder displays documents that are not filed and have been saved as draft:

To access **Drafts** folder:

1. From the **Side Navigation Bar** select **Drafts**:



2. The **Drafts** screen displays:



From here you can:

- Search for or sort documents, see **Searching for and Sorting Documents** on page **59** for details.

- Filter the documents that display, see **Using Filters in DocHub** on page **57** for details.

3. Select **Documents actions** ⋮ at the end of a document row to view the options:



You have the following options:

- **View document** - Select to display the document. See **Processing Documents** on page **17** for details.

- **Edit document data** - Select to update the document. See **Processing Documents** on page **17** for details.

- **Create Task** - Select to create a Task for the document. See **Creating a Task** on page **36** for details.

- **Download as PDF** - Select to download the selected document as a PDF. To view the **Downloads** folder, open **Windows File Explorer**, then locate and select **Downloads**. A list of your recently downloaded files display.
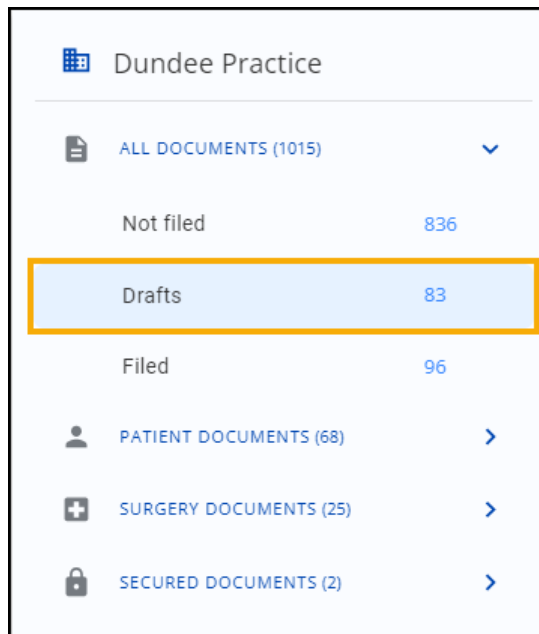
- **Download image** - Select to download the selected image. To view the **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files display.

- **Print document** - Select to print the selected document.

- **Delete** - Only available for **Not filed** and **Draft** documents. Select to delete the selected document and the **Delete document** screen displays. Select a deletion reason, add any notes required and then select **Delete**:



The deleted documents are stored in the **Deleted documents** folder for 14 days, after this time, unless they are restored, the documents are deleted from the system.

# Viewing Filed Documents

To find and view filed documents:

From **DocHub**, select the document required, if you are not sure where the document is, select **All Documents** from the pane on the left side of your screen and then find the document required using either:

- **Filters** - Utilise the available filters, see **Using Filters in DocHub** on page **57** for details, or

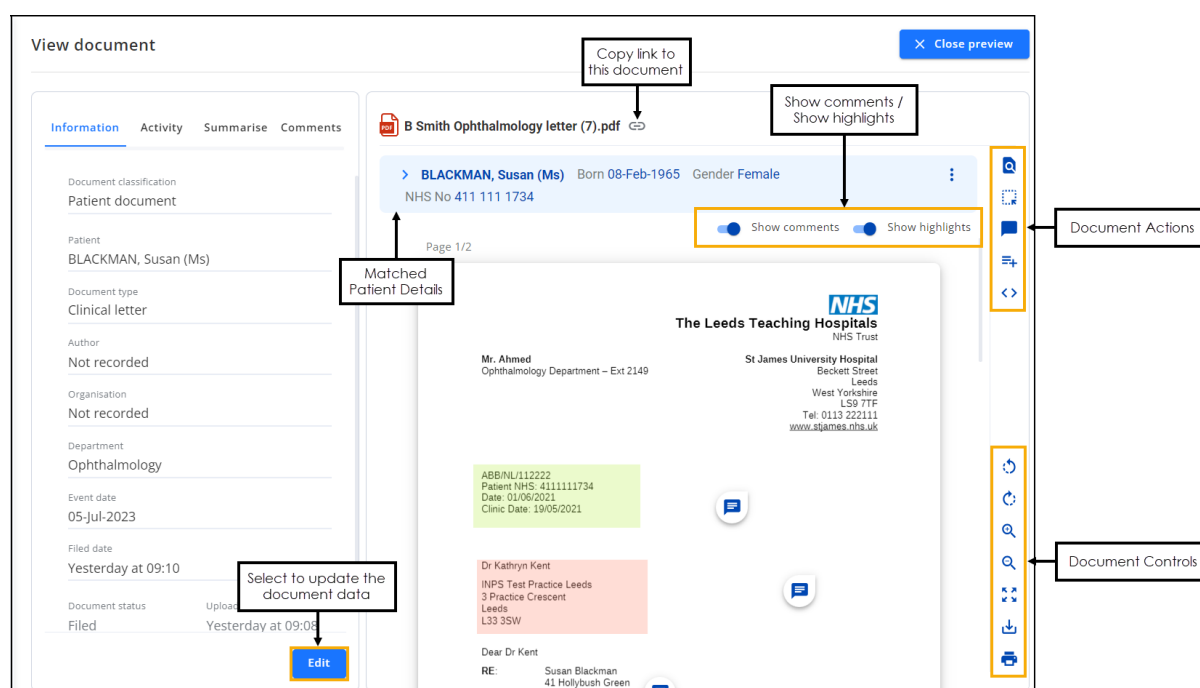- **Search** or **Sort** - Enter your search criteria or sort the documents, see **Searching for and Sorting Documents** on page **59** for details.

The document displays, the **Document Data** from the document displays on the left and the actual document on the right:



The following option may assist in the viewing of a document on your screen:
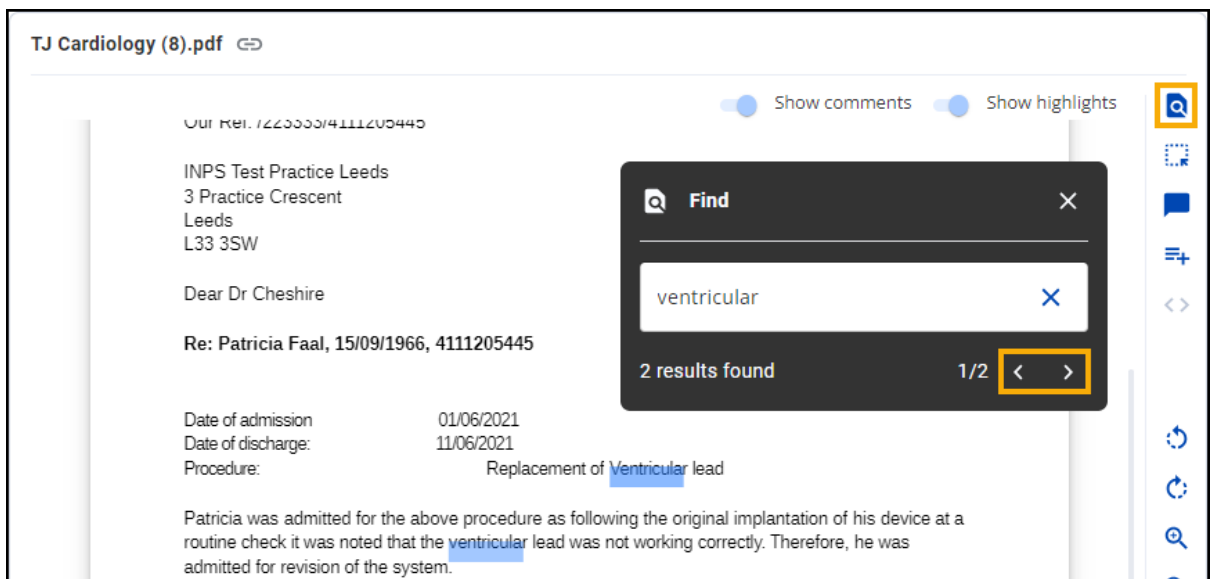
## *Document Controls*

- **Rotate left** - Especially useful for images, you can use this to rotate the document through 90 degrees at a time either clockwise or counter clockwise.

- **Rotate right** - Especially useful for images, you can use this to rotate the document through 90 degrees at a time either clockwise or counter clockwise.

- **Zoom in** - Select the **Minus -** to reduce the size of the document or **Plus +** to enlarge the document. The percentage value in the middle displays the changes you make.

-  **Zoom out** - Select the **Minus -** to reduce the size of the document or **Plus +** to enlarge the document. The percentage value in the middle displays the changes you make.

-  **Fullscreen** - Select to display the document in a full screen format. See **Full Screen Mode** on page **38** for details.

-  **Download** - Select to download the selected document. To view the **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files displays.

-  **Print** - Select to print the document.

## *Document Actions*

-  **Find** - Select to search for specific text in the document. The **Find** screen displays, enter your search criteria into **Search document**, the document highlights as you type. Use the arrows to scroll through the results:

-  **Highlight** - Select to highlight a block of text in the document. Hover over **Highlight** to select a highlight colour and then select and drag to create the highlight:



- Hover over a highlight, to view who created the highlight and when it was created.

 See **Adding a Highlight** on page **35** for details.

-  **Comment** - Select to add a comment to the document. Enter the comment required and select **Send** :



  The comment is added to the document.

 See **Adding a Comment** on page **31** for details.

-  **Create Task** - Select to create a Task for this document. See **Creating a Task** on page **36** for details.

-  **Next page** - Select to move through the pages of a multi-page document.

## *Show comments / Show highlights*

Slide the toggle to switch the comments and highlights **On**  or **Off** .

If there are no comments or highlights on the document the option is disabled .

From the matched patient details, you can select:
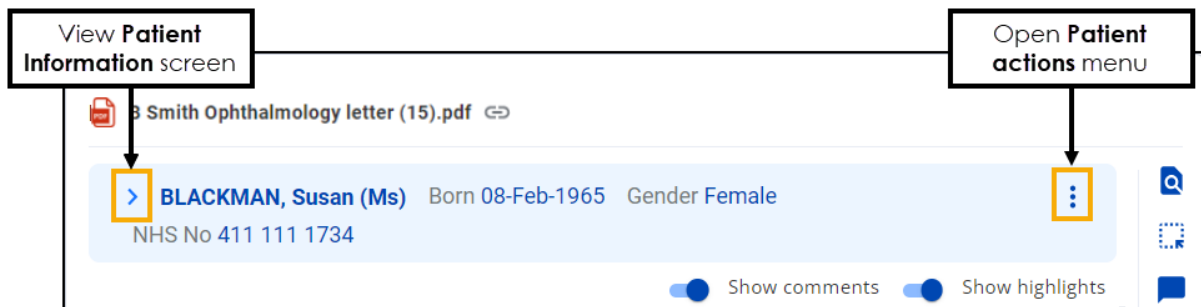


- **Patient Information** - To view the **Patient Information** screen. This displays the patient's address, phone number, email and preferred spoken language:
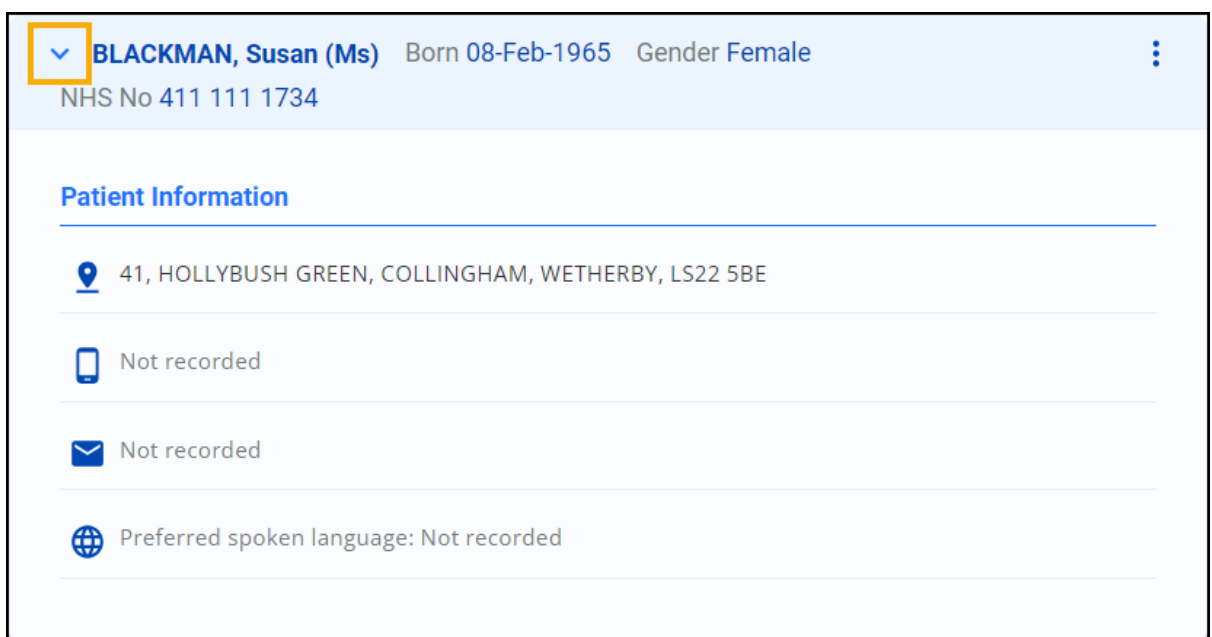


Select [∨] to close the **Patient Information** screen.

- **Patient actions** - To open **Patient actions** options, select **View patient record** to launch the patient's record in **Vision 3**:
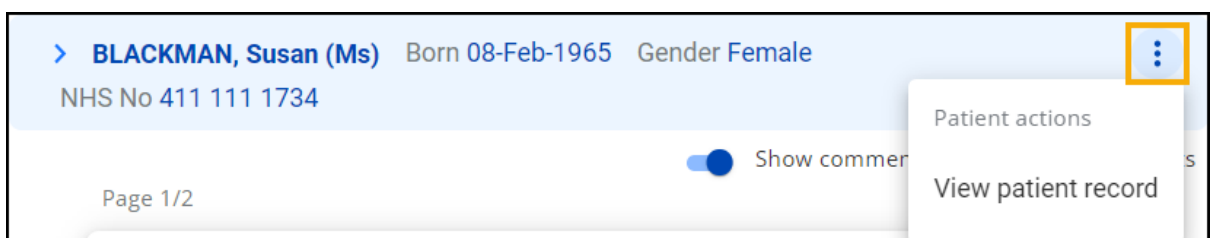


You can now select **Edit** [Edit] to edit the document data as required, see **Editing Filed Documents** on page **48** for details.
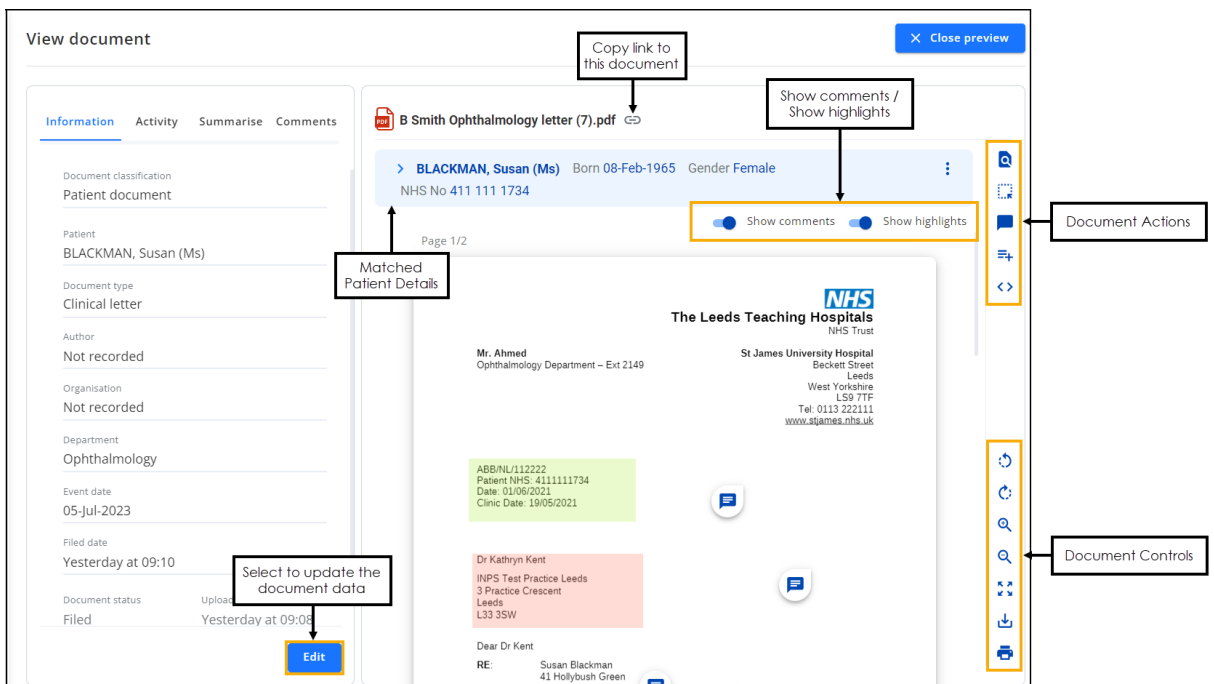
# Editing Filed Documents

To edit a filed document:

1. Search for and locate the filed document. If you are not sure where the document is, select **All Documents** from the pane on the left side of your screen and then find the document required using the sort or filter function.

   See **Searching for and Sorting Documents** on page **59** or **Using Filters in DocHub** on page **57** for details.

2. Select the document name to display a preview:

You can now update the document data using the following tabs:

- **Information** - Select **Edit** **Edit** to change the document data on this tab, see **Filing a Document** on page **23** for details.

- **Activity** - Select to view the document activity/audit trail, see **Viewing Document Activity** on page **26** for details.

- **Summarise** - Select to allocate clinical terms relating to this document. The first time you select the **Summarise** tab it is in Edit mode, after that you must select **Edit** **Edit** to add or update any clinical terms. See **Summarising a Document** on page **27** for details.

- **Workflow** - Select to view the workflow items/Tasks linked to this document. See **Workflow Documents** on page **31** for details.

- **Comments** - Select to view the active and resolved comments on the document. See **Viewing and Resolving Comments on a Document** on page **33** for details.

3. Select **Close Preview** or 🏠 to return to the **DocHub Home** screen.

![cegedim Healthcare Solutions logo]

# Remove a Patient from a Filed Document

To remove an incorrectly attached patient from a filed document:

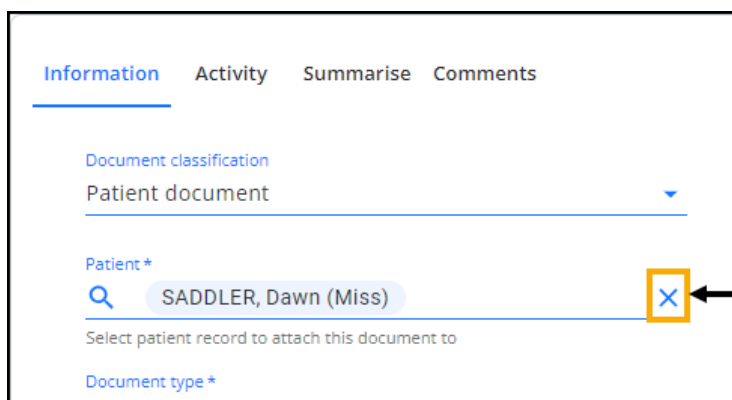1. From **DocHub**, select **Filed** from the **Side Navigation Bar**.

> 💡 **Training Tip** - You can sort the documents into any order by selecting a column header to order them by.

2. Select the document name to display a preview.
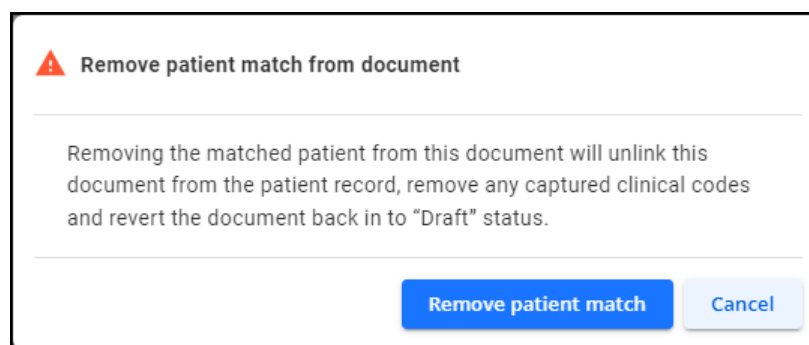
3. On the **Information** tab, select **Edit** [Edit].

4. Select **Clear** [X] next to the patient's name:



5. Select **Save changes** [Save changes].

6. A '*Remove patient match from document warning*' displays:



Select **Remove patient match** [Remove patient match] to continue.

The document is unlinked from the patient record, captured clinical codes are removed and the document changes to a status of **Draft.**

# Document Actions Menu

Select **Document actions** ⋮ at the end of a document row, in any document folder to view the options:



Note - **Document actions** is not available if someone else is currently accessing the document.

Select from the following:

- **View document** - Select to view the document for filed documents and select to edit the document for documents that are yet to be filed.

See **Viewing Filed Documents** on page **44** and **Processing Documents** on page **17** for details.

- **Edit document data** - Select to edit the document.

See **Processing Documents** on page **17** for details.

- **Create Task** - Select to create a task for the document.

See **Creating a Task** on page **36** for details.

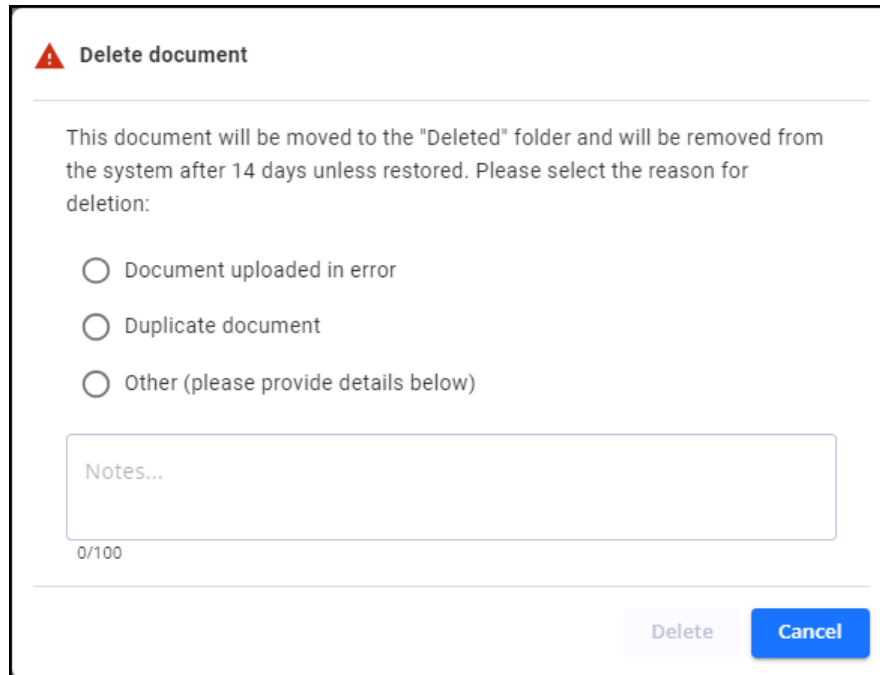- **Download as PDF** - Select to download the selected document as a PDF. To view the **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files displays.

- **Download image** - Select to download the selected image. To view the **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files displays.

- **Print document** - Select to print the document.

- **Delete** - Only applicable for **Not filed** and **Draft** documents only. Select to delete the document, the **Delete document** screen displays, select the deletion reason, add any notes required and then select **Delete**:



The deleted documents are then stored in the **Deleted documents** folder for 14 days, after this time, unless they are restored, the documents are deleted from the system.

# Deleted Documents
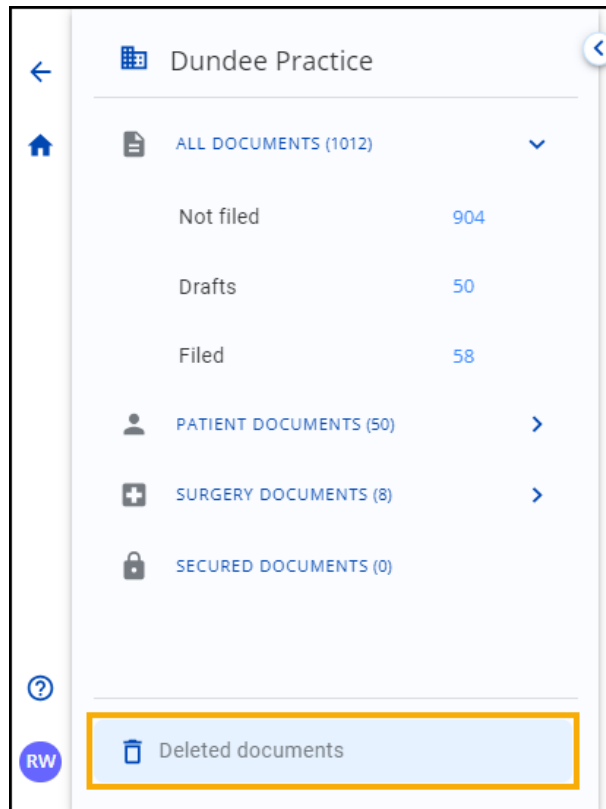
Deleted documents are stored in the **Deleted documents** folder for 14 days, after this time, unless they are restored, the documents are deleted from the system.

To access **Deleted documents** folder:

1. From the **Side Navigation Bar** select **Deleted documents**:

2. The **Deleted documents** screen displays:

From here you have the option to:

- Search for or sort documents, see **Searching for and Sorting Documents** on page **59** for details.

- Filter the documents that display, see **Using Filters in DocHub** on page **57** for details.

3. Select **Document actions**  at the end of a document row to view
the options:



You have the following options:

- **View document** - Select to view the document, please note you
cannot edit the document from here, you must restore it first.

- **Restore document** - Select to restore the document to the
original folder that it was deleted from. A banner displays
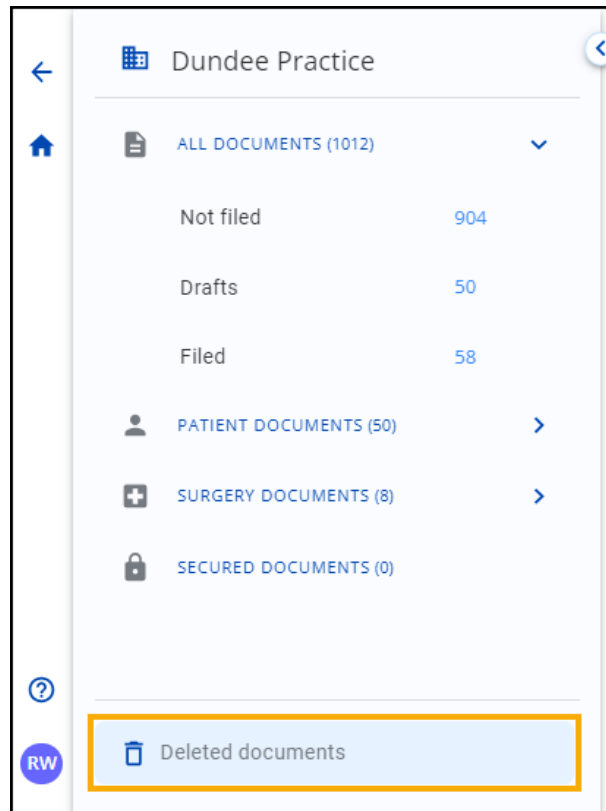detailing where the document is restored to:
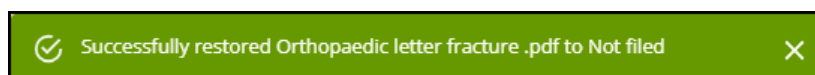
# Restoring a Deleted Document

Deleted documents are then stored in the **Deleted documents** folder for 14 days, after this time, unless they are restored, the documents are deleted from the system.

To restore a deleted document from the **Deleted documents** folder:

1. From the **Side Navigation Bar** select **Deleted documents**:



2. The **Deleted documents** screen displays:



From here you have the option to:

- Search for or sort documents, see **Searching for and Sorting Documents** on page **59** for details.

- Filter the documents that display, see **Using Filters in DocHub** on page **57** for details.

3. Select **Document actions** ⋮ at the end of a document row to view the options:



a. Select **View document** to view the document if required.

🖊 **Note** - You cannot edit the document from here, you must restore it first.

b. Select **Restore document** to restore the document to the original folder that it was deleted from. A banner displays detailing where the document is restored to:
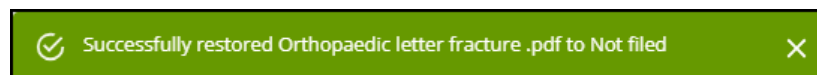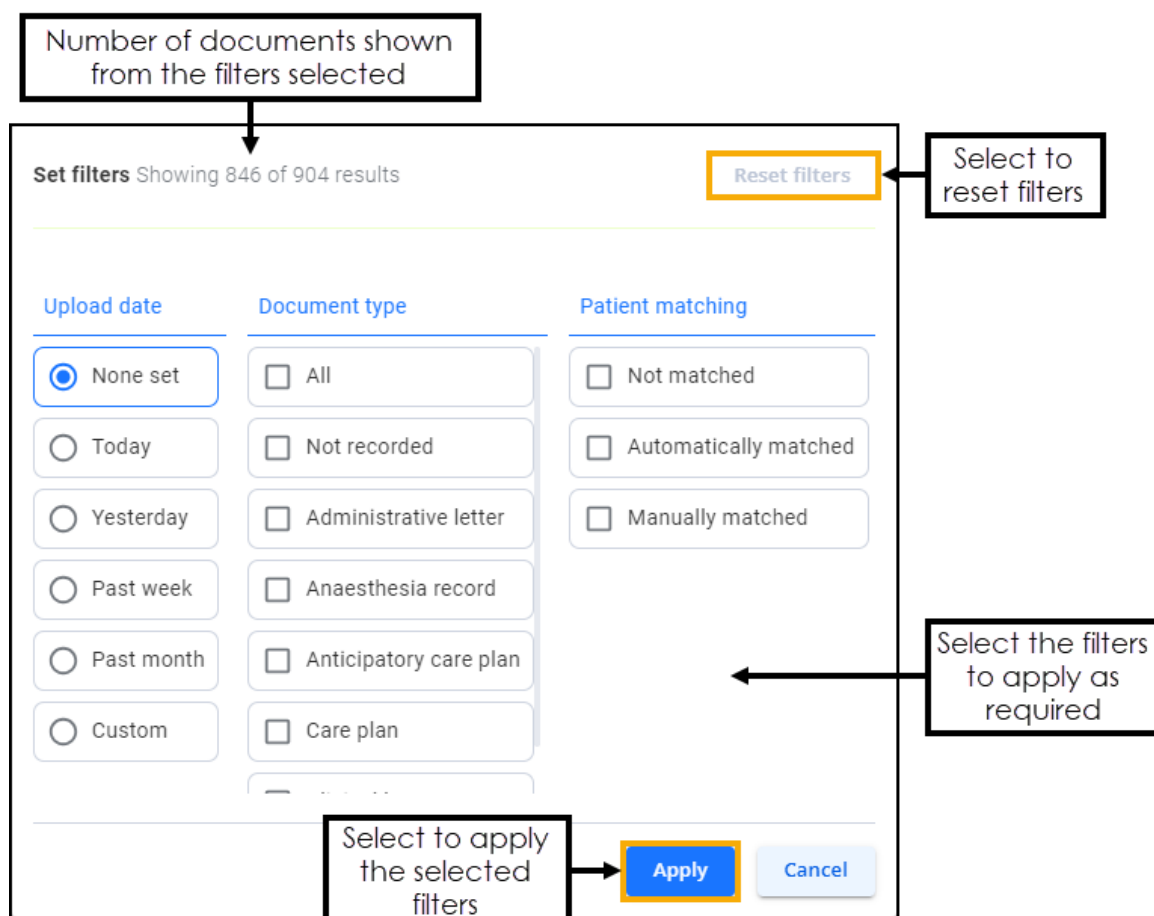
# Using Filters in DocHub

Filters can be applied to any list that displays in a folder, this can help you control the number of documents you are presented with.

🔵 See also **Searching for and Sorting Documents** on page **59**.

To filter the documents that display on your screen:

1. From **DocHub**, select the folder you want to filter, for example, **Not filed**.

2. Select **Filters** [ 🔽 Filters ] and the **Set filters** screen displays:

Number of documents shown from the filters selected

| Set filters Showing 846 of 904 results | | Reset filters | Select to reset filters |

**Upload date** | **Document type** | **Patient matching**

- ⦿ None set
- ○ Today
- ○ Yesterday
- ○ Past week
- ○ Past month
- ○ Custom

☐ All
☐ Not recorded
☐ Administrative letter
☐ Anaesthesia record
☐ Anticipatory care plan
☐ Care plan

☐ Not matched
☐ Automatically matched
☐ Manually matched

Select the filters to apply as required

Select to apply the selected filters → **Apply**   **Cancel**

3. Select the filter(s) to apply, for example, you may want to only see documents that have arrived in the last week that have not been matched to a patient in which case you would select **Upload date - Past week** and **Patient matching - Not matched**. Use **Custom** to set a specific date if required.

4. Select **Apply**.

💡 **Remember** - With filters applied, you may miss important documents, so make sure to clear them on a regular basis to check.

To clear a filter, select **Filters (n)** ![Filters (1)] - **Reset filters**:
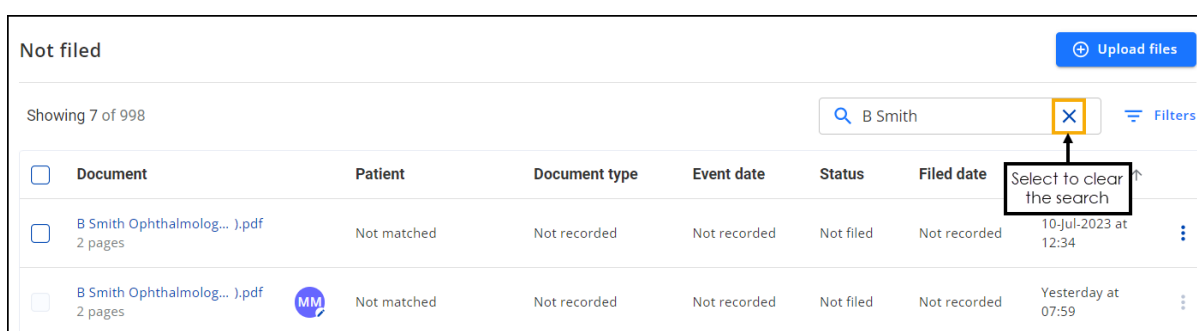
# Searching for and Sorting Documents

You can easily search for and sort for documents in **DocHub**.

> Filters can be applied to the list that displays in a folder, this can help you control the number of documents you are presented with. See **Using Filters in DocHub** on page **57** for details.

## Searching for Documents

To search for a document simply enter the document name in **Search**. The list update as you type:
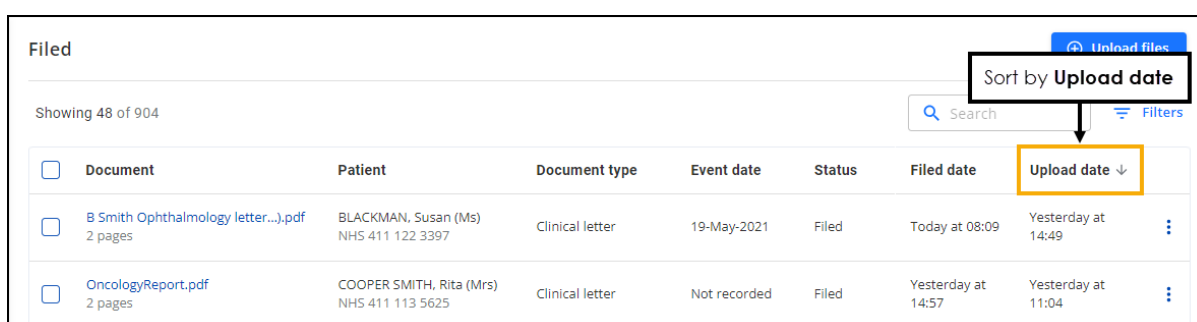


To clear the search, select **Close** [X].

## Sorting Documents

Select any header to sort the documents by the header selected, for example, select **Upload date** to sort documents by the date uploaded onto **DocHub**. You can sort ascending (oldest to newest) or descending (newest to oldest) as required:
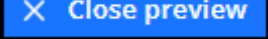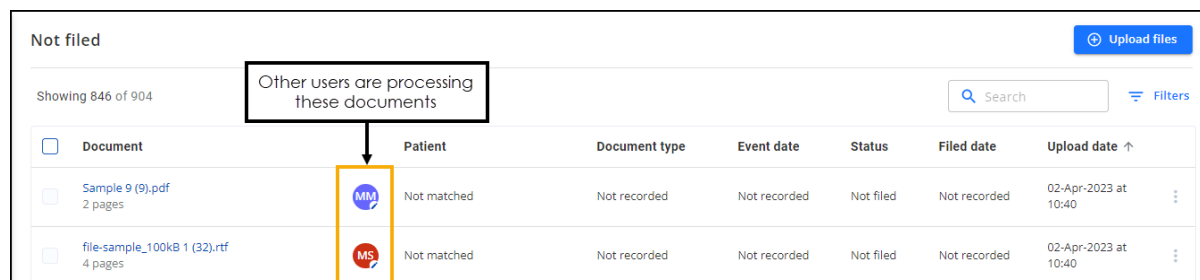
# FAQ Summary

## Document Data

### *Why is the document data displaying as 'Not recorded'?*
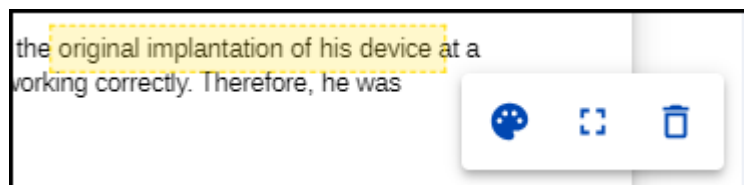
Another user is viewing the document:



Select **Close preview**  to close the document.

Initials  in the document list indicates that another user is currently processing the document:



### *How do I change the colour or size of a highlight?*

To change the colour of a highlight, select the highlight and an options toolbar displays:



Select from:

- **Colour**  - To select a new colour

- **Resize**  - To move the highlight box

- **Delete**  - To delete the highlight

## *How do I delete a highlight?*

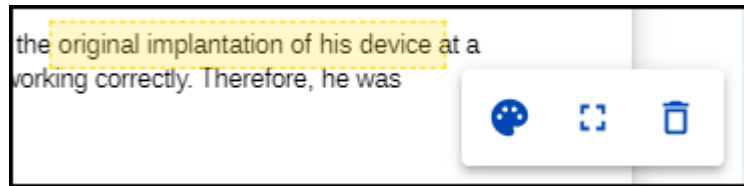To remove a highlight, select the highlight and an option toolbar displays:



Select from:

- **Colour**  - To select a new colour

- **Resize**  - To move the highlight box

- **Delete**  - To delete the highlight

# Document Lists

## *What do the icons next to the document names mean?*

| Icon | Description |
|------|-------------|
|  | The document has a task allocated to it, see **Documents with Linked Tasks** on page **17** for details. |
|  | The document is being viewed by another user, see **Concurrent Users** on page **16** for details. |

# Troubleshooting

Error messages may display at the bottom of **DocHub**:
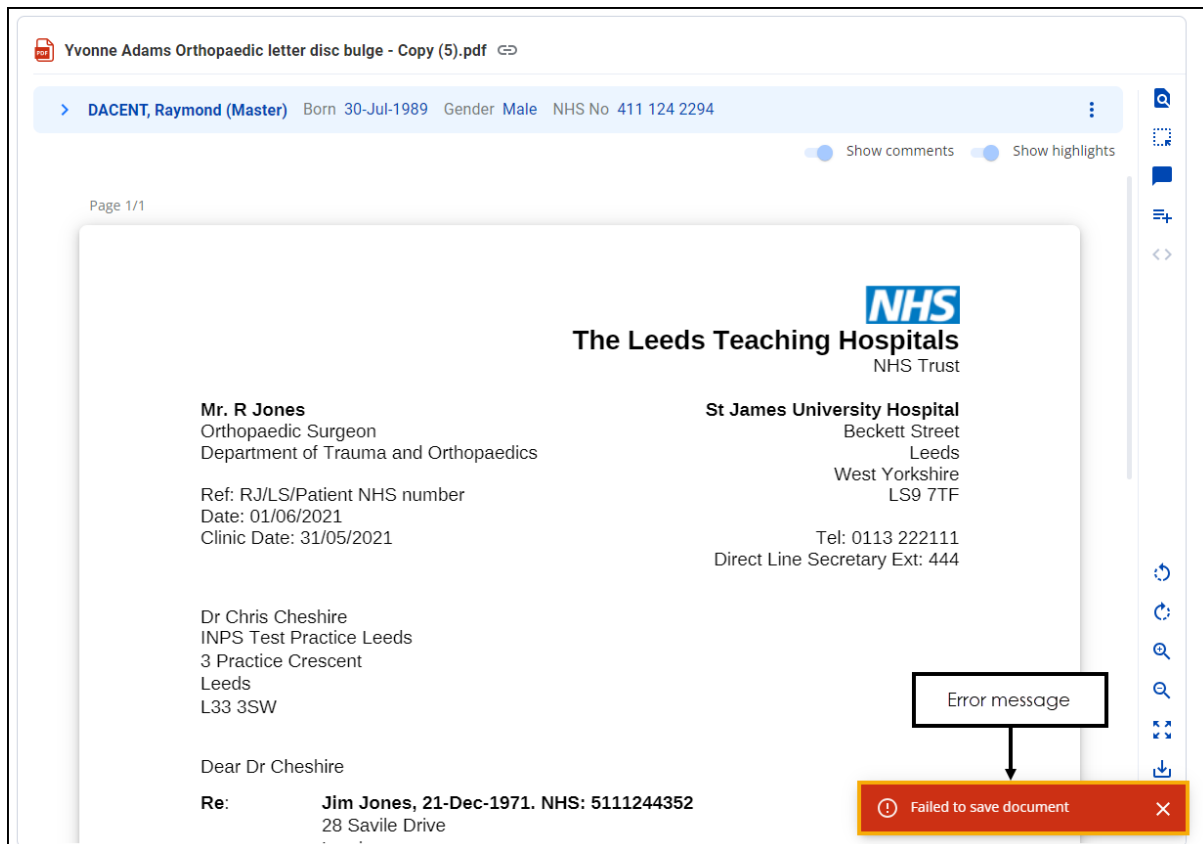


See below how to troubleshoot issues within **DocHub**:

## *Failed to save document*

There was an issue saving the document, try again.

## *Failed to attach document to selected patient*

There was an issue attaching the document to the selected patient. Try again.

## *Failed to file document*

There was an issue filing the document, try again.

# Logging Out of DocHub

As with all applications, it is important that you log out of **DocHub** properly:

To log out of **DocHub**, select your name at the bottom left of the screen and then select **Log out**: