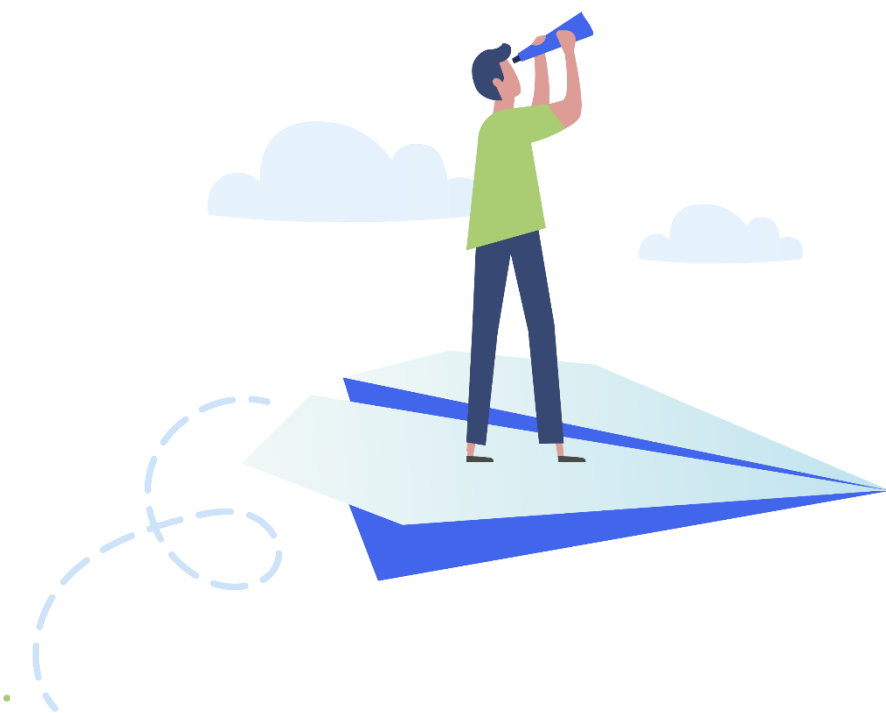




# ZeDOC User Guide

Version 1.1

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## Introduction to ZeDOC

**ZeDOC** is a scanning solution provided by **Cegedim Healthcare Solutions** to support the scanning and attaching of documents in **Vision 3**.

**ZeDOC** enables:

- Scanning of both single pages and batches of documents of different sizes.
- Processing of electronic documents.
- Enhancement and annotation of images.
- Processing of document batches.
- Configuration of metadata, document attributes, categorisation and file name structure.



**Training Tip** - '**Metadata**' is the set of data that describes and gives information about your document.

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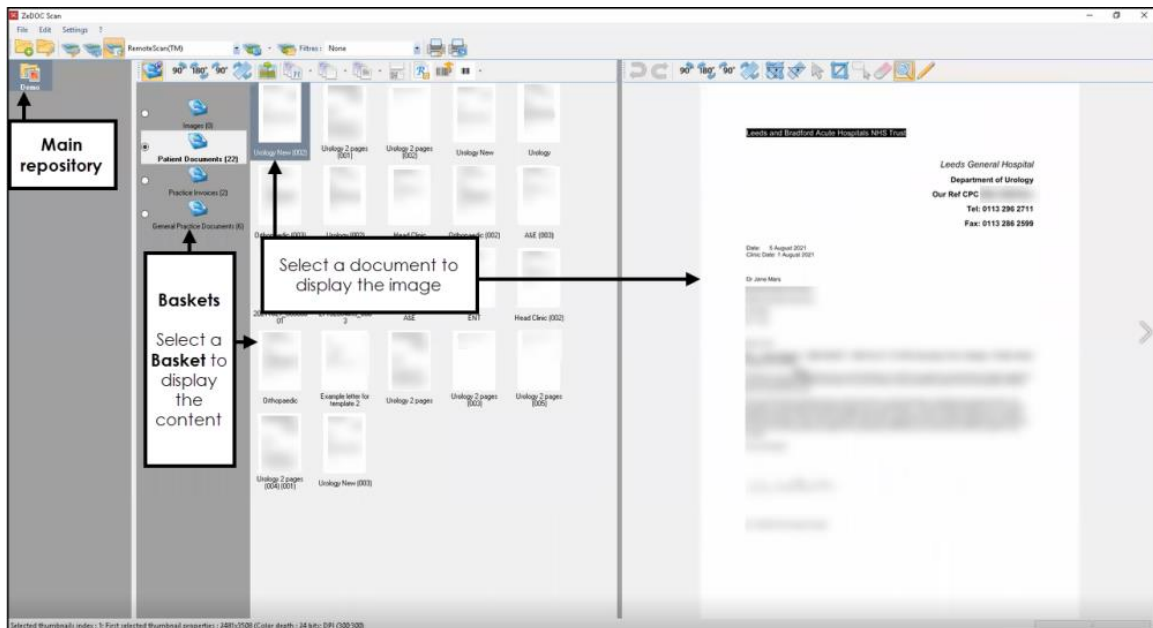
- Attachment of documents with metadata to a patient record.
- Optional clinical coding and workflow from a patient record.

The following overview shows a summary of the scanning process using **ZeDOC** in **Vision 3**:



## Navigating ZeDOC

The **ZeDOC** screen is broken down into four panels:



- **Main Repository** - Where you set up and maintain your metadata, see [Creating a Repository](#) on page **8** for details.
- **Baskets** - The folders you scan or import your documents into, see [Creating Baskets](#) on page **14** for details.
- **Basket Content** - Displays the documents within the selected **Basket**. This is where you assign metadata to your documents, see [Processing Documents with ZeDOC](#) on page **16** for details.
- **Image** - The image of the selected document.




See [Setting Up ZeDOC](#) on page **8** for details.

## ZeDOC Prerequisites

The following table contains the minimum system specifications for **ZeDOC**:

	For Local Installation	For Server Installation
<b>Operating System</b>	Windows 10	Windows 2016 or Windows 2019 Can use virtual server
<b>CPU</b>		4 cores 3 GHz minimum
<b>Memory</b>	4Gb minimum, 8 Gb recommended	8 Gb minimum
<b>Storage</b>	Minimum of 10Gb of free space	Minimum of 50Gb of free space
<b>.Net</b>	.Net 4.8	
<b>Scanner</b>	Scanner with Twain Driver	
<b>Additional software required</b>	Auto Hotkey Macro	Auto Hotkey Macro Remote scan software
<b>Vision 3</b>	Scanning Assistant update to Local Guideline Index	Scanning Assistant update to Local Guideline Index

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 **Note - ZeDOC** can be installed on local machines where a local scanner or document capture device is also installed. You must create a shared folder so that documents captured locally can be accessed from your hosted environment.

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Once installed, **ZeDOC** must be set up.

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 See **Setting Up ZeDOC** on page 8 for details.

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## Setting Up ZeDOC

To scan items into **Vision 3** using **ZeDOC** you must first create:




- **A Repository** - This is the main file you are scanning into and where you set up your metadata options, see [Creating a Repository](#) on page 8 for details.

**Training Tip** - '**Metadata**' is a set of data that describes and gives information about other data, in this case, about your document.

- **Baskets** - These are the sub-folders you scan your documents into and from where you process them, see [Creating Baskets](#) on page 14 for details.
- **Electronic Document Folder** - To create a consistent approach to all document management, you can import electronic documents to attach to your patient records, for example, TIF (Tagged Image Format) files and PDF documents. You can use the same Basket as you use for physical documents, or you can set up a separate one, for example, a Basket named **Electronic Documents**, see [Creating Baskets](#) on page 14 for details.

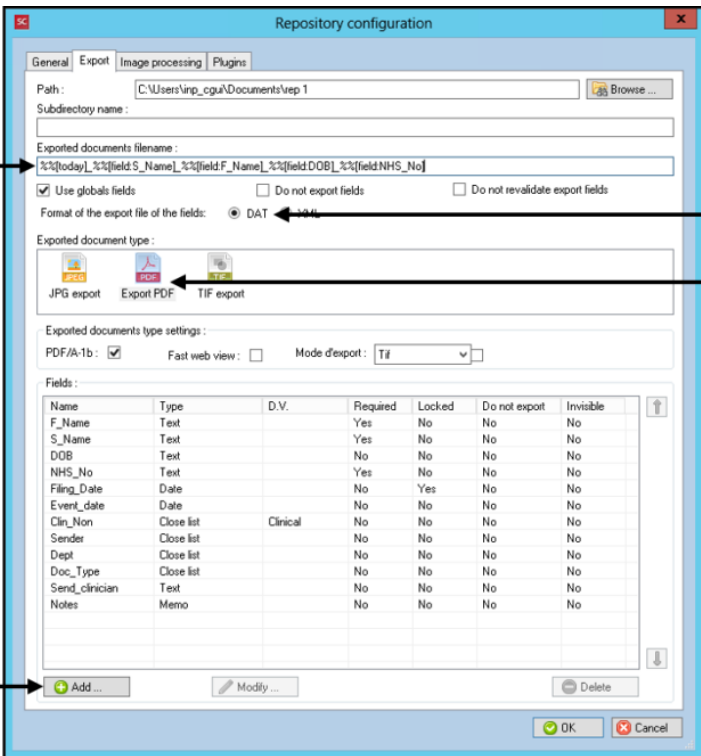
## Creating a Repository

A repository is the main file you are scanning documents into. To create a repository:

1. From **ZeDOC**, select **Create a repository** .
2. The **Repository creation** screen displays, select **Next**.
3. The **Step 1 screen** displays, in **Name** enter a name for your repository.
4. From **Export type** select **Image and metadata**  and then select **Next**.
5. The **Step 2 screen** displays, from **Exported document type**, highlight **Export PDF**.
6. Now, select **Browse** .
7. In **Browse for Folder**, select **Make New Folder**. A new folder displays, give it a recognisable name, for example, **Scanned Documents** and select **OK**.
8. The **Repository configuration** screen displays, you must now set up the types of metadata you wish to record for your documents:



**i** Important - ZeDOC selects **DAT** as the **Format of the export file of the fields**. This must not be changed.



**Exported Document Filename** must match this and be entered last during set up of this screen


Select **DAT**

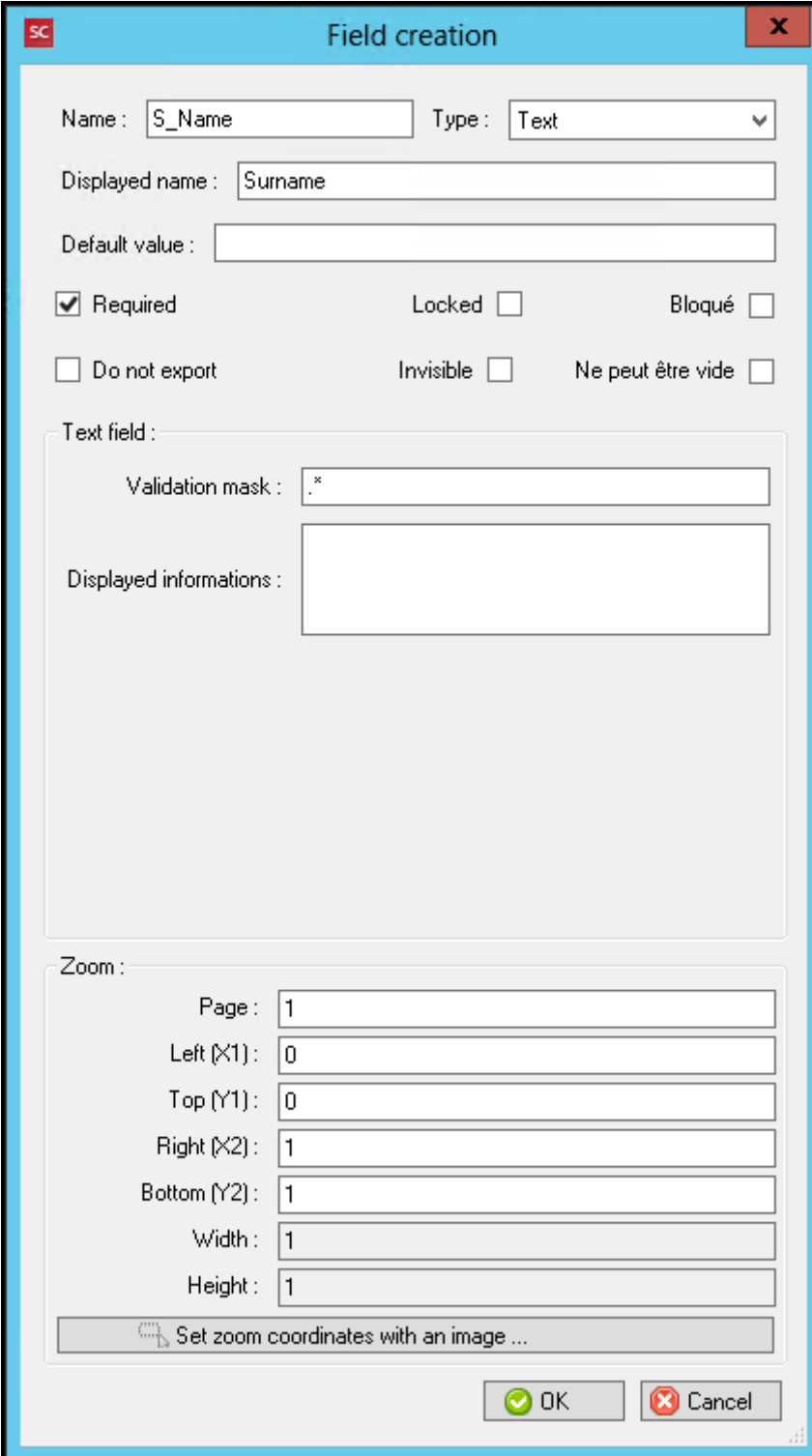
Select **Export PDF**

Select **Add** to set up types of metadata

Name	Type	D.V.	Required	Locked	Do not export	Invisible
F_Name	Text		Yes	No	No	No
S_Name	Text		Yes	No	No	No
DOB	Text		No	No	No	No
NHS_No	Text		Yes	No	No	No
Filing_Date	Date		No	Yes	No	No
Event_date	Date		No	No	No	No
Clin_Non	Close list	Clinical	No	No	No	No
Sender	Close list		No	No	No	No
Dept	Close list		No	No	No	No
Doc_Type	Close list		No	No	No	No
Send_clinician	Text		No	No	No	No
Notes	Memo		No	No	No	No

9. From **Exported document type**, select **Export PDF**.



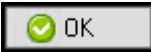


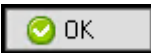
10. Select **Add**  Add ... and the **Field creation** screen displays:




The image shows a 'Field creation' dialog box with the following fields and options:

- Name: S\_Name
- Type: Text
- Displayed name: Surname
- Default value: (empty)
- Required:
- Locked:
- Bloqué:
- Do not export:
- Invisible:
- Ne peut être vide:
- Text field section:
  - Validation mask: .\*
  - Displayed informations: (empty)
- Zoom section:
  - Page: 1
  - Left (X1): 0
  - Top (Y1): 0
  - Right (X2): 1
  - Bottom (Y2): 1
  - Width: 1
  - Height: 1
- Buttons: OK, Cancel
- Footer: Set zoom coordinates with an image ...

11. Complete as appropriate:

- **Name** - Enter a short name for the type of metadata, for example, S\_Name.
- **Type** - Select from the available options:
  - **Text** - Select to allow a short description for this metadata type.
  - **Date** - Select to specify this metadata as a date, defaults to DD/MM/YYYY format, enter a different format in **Date field - Format** to update the format if required.
  - **Open list** - Select to create a list that the scanner can add to.
  - **Close list** - Select to create a list to choose from for this metadata type:
    - a. **Available types** displays, select **Internal list**.
    - b. Select **Choose**  and the **List editor** screen displays.
    - c. In **New value** enter the list items, for example, your local hospitals.
    - d. Select **Add**  in between each one once they are all added, select **OK**  to save.
  - **Multi list** - Select to create a list to choose multiple items from for this metadata type:
    - a. **Available types** displays, select **Internal list**.
    - b. Select **Choose**  and the **List editor** screen displays.
    - c. In **New value** enter the list items, for example, a list of key diagnosis.
    - d. Select **Add**  in between each one once they are all added, select **OK**  to save.
  - **Check box** - Select to create a tick box, complete the **Checkbox field** options, for example, **Yes** and **No**
  - **Counter** - Displays how many documents you have processed today. This number resets each day.
  - **Memo** - Select to allow longer free text for this metadata type. Maximum number of characters 2048.
  - **Extract text** - Not currently in use.
  - **Barcode** - Not currently in use.
  - **Dividing line** - Not currently in use.
- **Displayed name** - Enter the full name of this type of metadata, for example, **Patient Surname**.

- **Default value** - Enter a default value if appropriate depending on the **Type** selected above, for example, if you select **Check box**, you can enter **Checked** or **Unchecked** as the default.
- **Required** - Tick to mark this type of metadata as mandatory.
- **Locked** - Select for information that is not going to change, for example, your practice name.
- **Bloque** - Select for information that is not likely to change, but has a tick option to update if required.
- **Do not export** - Select to exclude this information from the metadata.
- **Invisible** - Select to hide the line.
- **Ne peut etre vide** - Select to mark a line as must be completed.
- **Text field:**
  - **Validation mask** - Select to add ....
  - **Displayed informations** - Select to add an **I** symbol to the line, for example,  Pt Surname.
- **Zoom** - Select and define if you want to zoom in on particular part of the document every time, for example, if the patient surname is always on the top left hand side of a document then you can set it to always zoom in on that part. Define the details using:
  - **Page**
  - **Left (X1)**
  - **Top (Y1)**
  - **Right (X2)**
  - **Bottom (Y2)**
  - **Width**
  - **Height**
  - **Set zoom coordinates with an image** - Select to define the zoom in area using an example page (recommended).

12. Select **OK** to save.

13. Repeat from Step 4 until all expected metadata types are set up. For the import process to **Vision 3** you must set up at least the following in this format:

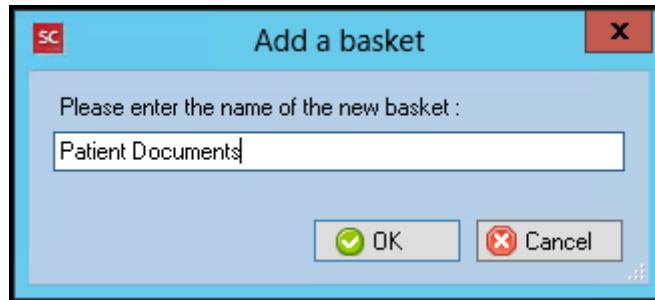
Name	Description	Type	Required
S_Name	Patient Surname	Text	Yes
F_Name	Patients First Name	Text	Yes
DOB	Date of Birth	Date	No
NHS_No	NHS Number	Text	Yes
File_Date	Filing Date	Date	Yes
Event_Date	Event Date	Date	No
Clin_Non	Clinical/Non-Clinical Letter	Closed list	Yes
Sender	Organisation	Closed List	Yes
Dept	Department	Closed list	No
Doc_Type	Document Type	Closed list	No
Send_Clinician	Sending Clinician	Text	No
Note	Filing Notes	Memo	No

14. You must now tell the system which types of metadata are which, in the **Exported documents filename**, enter  
 '%%[today]\_%%[field:S\_Name]\_%%[field:F\_Name]\_%%[field:DOB]\_%%[field:NHS\_No]'
15. Select **Next** and then **Next** again.
16. Finally, select **End**.

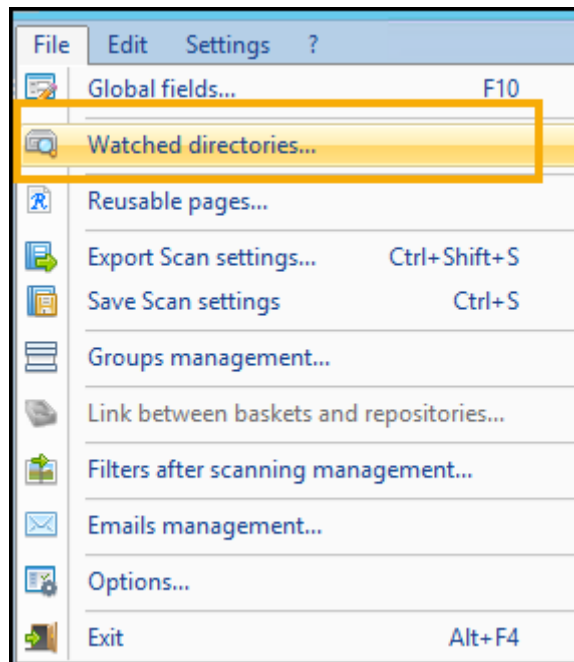
## Creating Baskets

To create new **Baskets**:

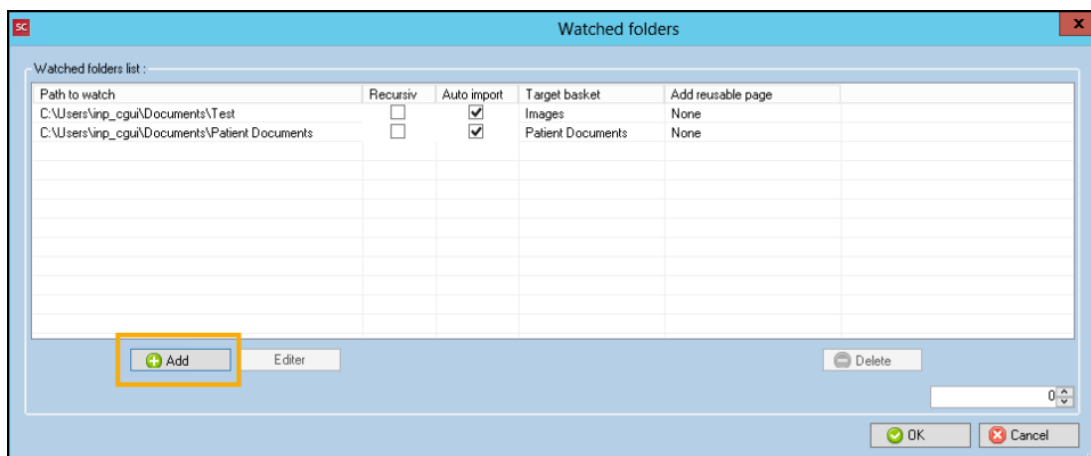
1. From **ZeDOC**, right click in the **Basket** pane and select **Create**.
2. The **Add a basket** screen displays, enter a name for your **Basket**, for example, **Patient Documents**:



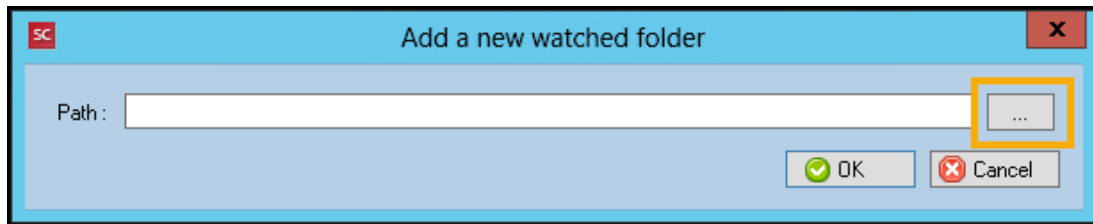
3. You must then set up the folder, from **File**, select **Watched directories**:



4. The **Watched folders** screen displays, select **Add**  **Add ...**:



5. The **Add a new watched folder** screen displays, select **Browse** :



6. Select **Make a New Folder**, and give it the same name as the basket.  
7. Select **OK** to save.  
8. Now, from the Watched folders screen, select the target basket and check **Auto Import** is ticked.  
9. Select **OK** to save.

---

 See **Processing Documents with ZeDOC** on page **16** for details.

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## Processing Documents with ZeDOC

Processing documents with **ZeDOC** is broken down in-to the following four components:

- **Scanning your documents** - See [Scanning Your Documents](#) on page **16** for details.
- **Importing electronic documents** - See [Importing Electronic Documents](#) on page **18** for details.
- **Selecting metadata** - See [Attaching Metadata to a Document](#) on page **19** for details.
- **Processing documents in Vision 3** - See [Processing Documents in Vision 3](#) on page **21** for details.

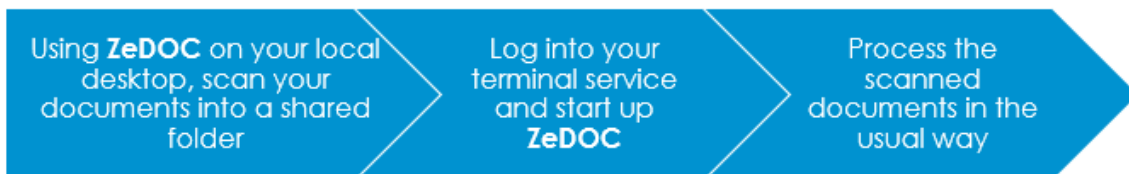
### Scanning Your Documents

The way you scan your documents depends on whether you are using either:

- A scanner installed locally, see [Scanning Locally](#) on page **16** for details, or
- A scanner installed on your terminal service, see [Scanning from a Terminal Service](#) on page **16** for details.

#### Scanning Locally

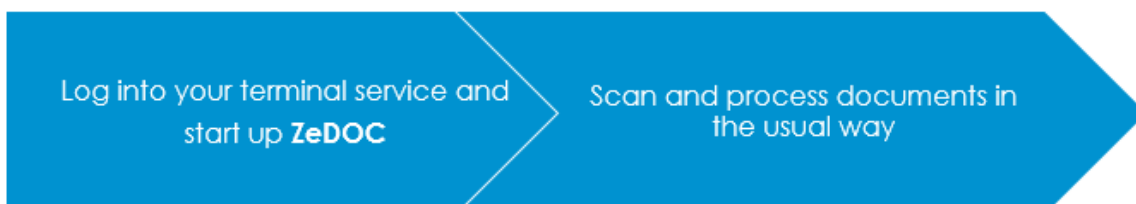
If your scanning device is set up on a local desktop the scanning process follows the following workflow:



In this solution, you have two versions of **ZeDOC**, a locally installed one for scanning documents and a terminal service one for processing documents.

#### Scanning from a Terminal Service

If your scanning device is set up on your Terminal Service the scanning process follows the following workflow:



In this solution you have one version of **ZeDOC**, this is installed on your terminal service and everything from scanning to processing can be completed from this instance.



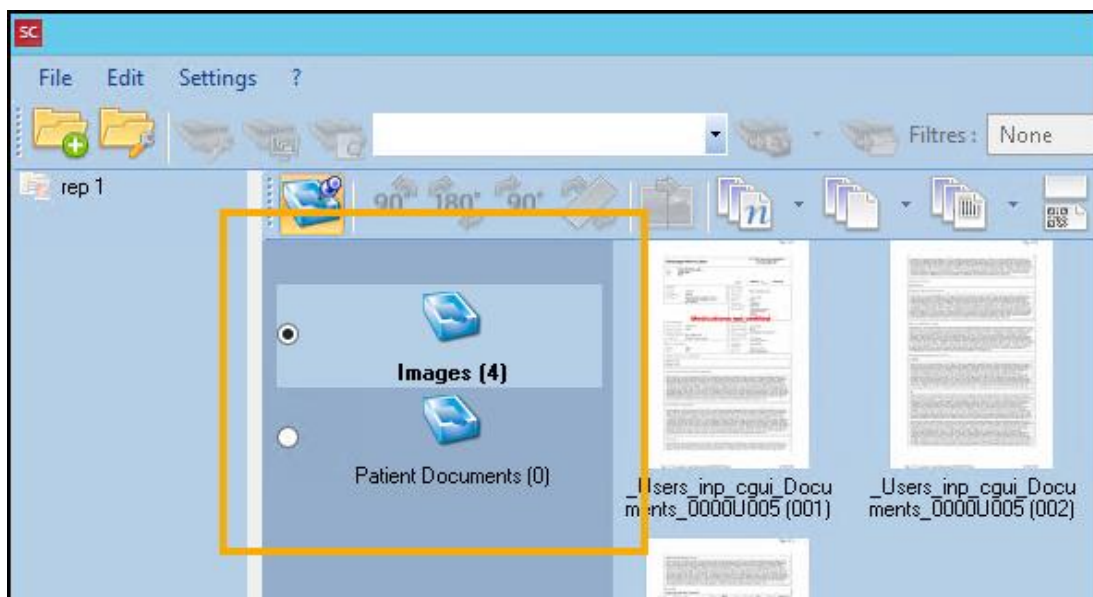
## Scanning Documents

To scan your physical documents:

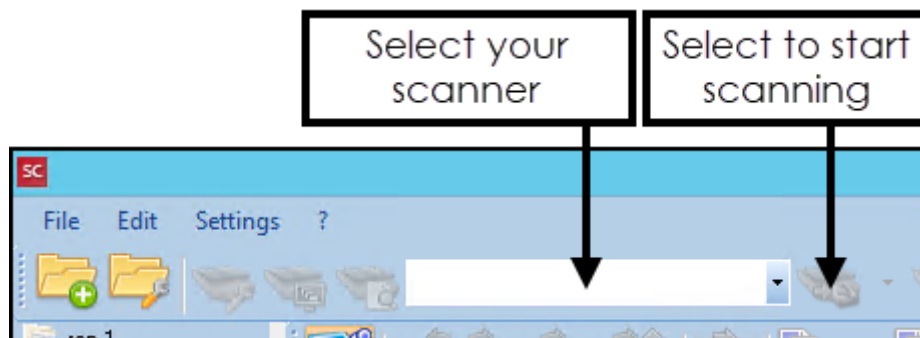


1. From your computer desk top, select **ZeDOCScan**.
2. Prepare and load your documents into the scanner, ensure multi-page documents are scanned together and in order.
3. Either:
  - If you are scanning locally, select the shared folder that the terminal service instance of **ZeDOC** has access to.
  - If you are scanning from a terminal service, select the **Basket** you want to scan into:

➔ See **Setting Up ZeDOC** on page 8 for details of setting up Baskets.



4. Select your scanner from the available list and select **Scan** :



5. The **RemoteScan Enterprise** screen displays, complete as required:
  - **RemoteScan Server** - Select your scanner.
  - **Scan Settings:**
    - **Resolution** - Defaults to **250**, update if required.
    - **Paper Size** - Defaults to **A4 Letter**, update if required.
    - **Color/BW** - Defaults to **Black and White**, update if required.
    - **Scan Source** - Defaults to **Use Main Scanner**, update if required and another scanner is available.

6. Select **Scan** .

The number next to the **Basket** name reflects the number of pages scanned, select the **Basket** to display the items scanned. The scanned documents display in the **Basket Content** panel, select a document to display the image in the far right panel.

## Importing Electronic Documents

To create a consistent approach to all document management, you can import electronic documents to attach to your patient records, for example, TIF (Tagged Image Format) files and PDF documents:



1. From your computer desktop, select **ZeDOC Scan** .
2. Now from your **Windows** taskbar, open **File Explorer** and navigate to where you have saved the documents to import.
3. Open a second instance of **File Explorer** and navigate to the Basket required.
4. Select, drag and drop the files you require from their saved location to your Basket.




---

**Training Tip** - To select more than one item, hold down the **Ctrl** key and select all the items required.

---

5. The images now display in your **Basket** ready for processing.




---

**Note** - You can process scanned and electronically received documents at the same time in from the same **Basket**.

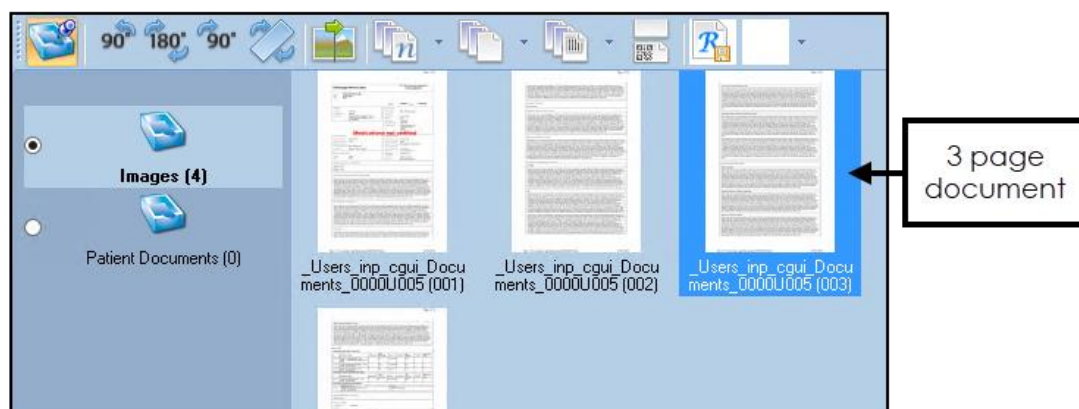
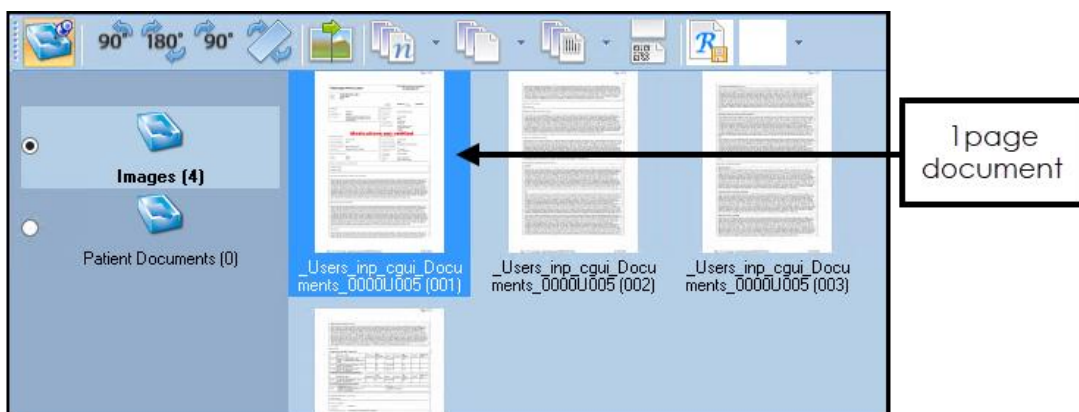
---

## Attaching Metadata to a Document





Metadata is the set of data that describes and gives information about your document. For **Vision 3** to recognise your patient and for you to have an effective at a glance summary of a document without opening and reading it, you must attach the appropriate metadata to it.

To attach metadata to a document:

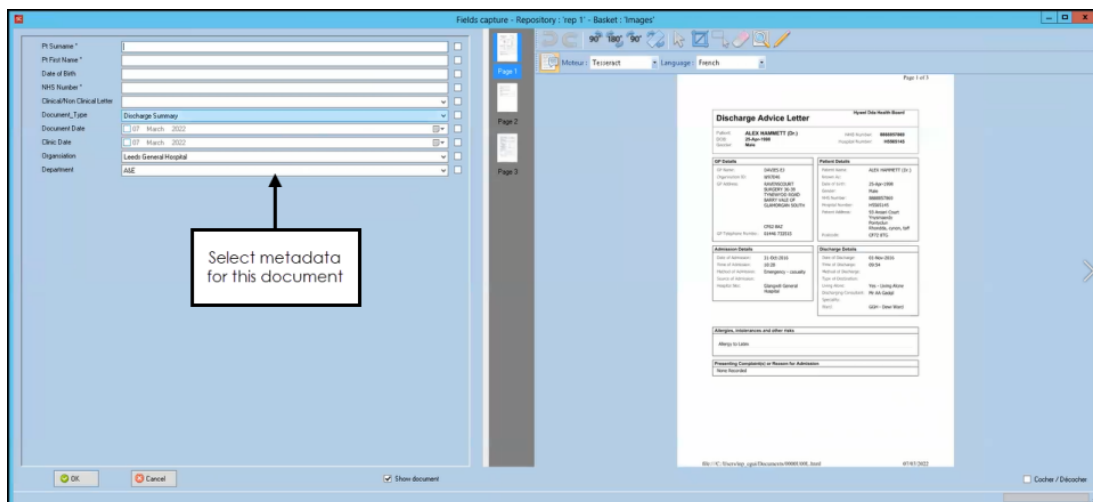
1. From **ZeDOC**, select the **Basket** to process and the documents in the **Basket** display to the right.
2. Starting with the first image, top left, select the document to preview the document.
3. Double click on the last page of the first document, for example, if this is a single page document double click on the first page, if it is a three page document, double click on page three:



- The **Fields capture - Repository** : *Repository name - Basket* : **Basket name** screen displays, review the document using the following tools where required:

- 
**Orientation** - Select the appropriate option to change the orientation of the image, for example, a landscape page.
- 
**Crop** - Select to crop the image if appropriate.
- 
**Zoom** - Select to zoom in on the image.
- 
**Annotate** - Add annotation.

- On the left hand side enter or select the relevant metadata:





 See **Creating a Repository** on page 8 for details on setting up your metadata options.

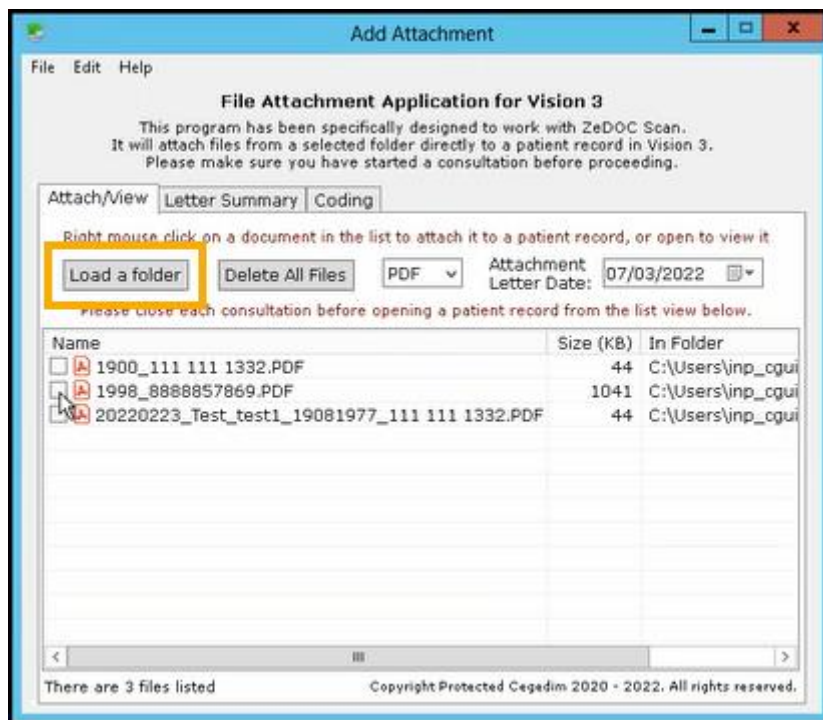
- Select **OK**.
- The document no longer displays in the **Basket**, repeat steps 3 - 6 until all documents are processed.

You can now close **ZeDOC** and move over to **Vision 3**.

## Processing Documents in Vision 3

To attach documents to a patient record:

1. If not already open, open **Vision 3** and select Consultation Manager.
2. Select the **Local Index** .
3. Select **Scanning Assistant** .
4. The **Add Attachment** screen displays, select **Load a folder** and navigate to the folder containing your scanned documents:

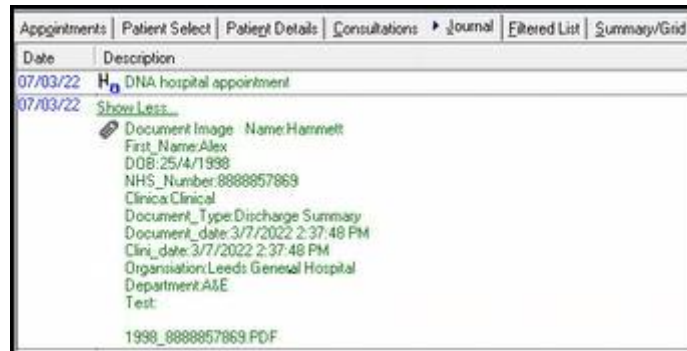


5. Your scanned documents display, if required, double click on a document to view the details.
6. From **Add Attachment**, right click on a document and select **Open Patient Record**. The patient record displays.

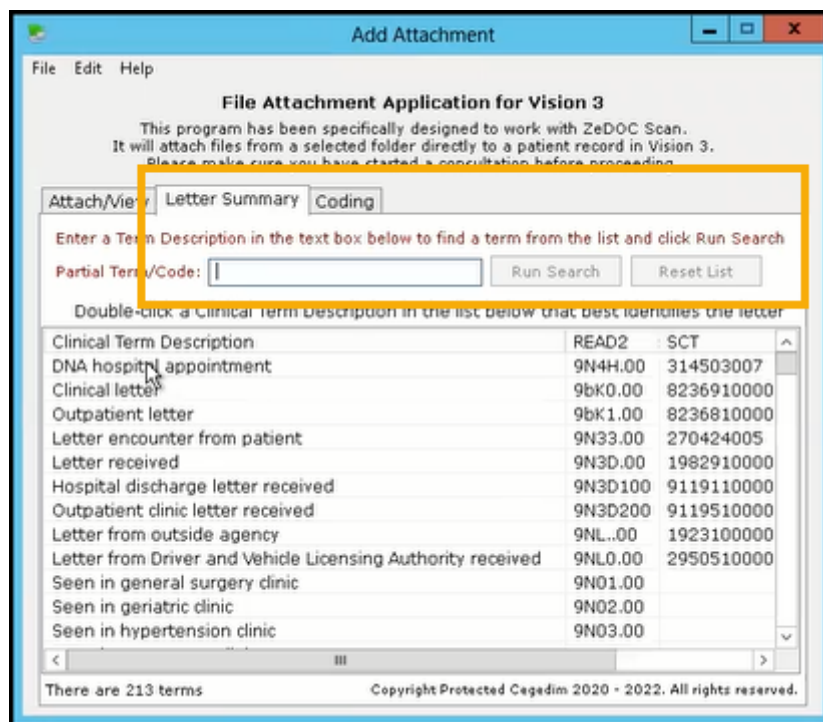


**Training Tip** - We recommend you start at the top of the list and work down.

- Next, from **Add Attachment**, right click on the same document and select **Attach to Vision**. An entry is added to the patient record with all the related metadata:




- Optionally, you can now summarise the document. From **Add Attachment** select the **Letter Summary** tab, search for and select the required clinical term:



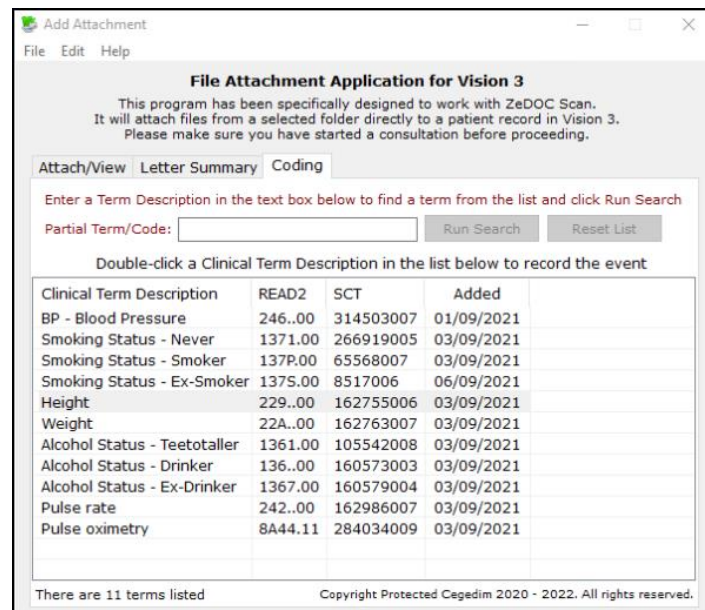
➔ See [Updating the Term Description List](#) on page 23 for details on how to update the list available.

- A **History - Add** screen displays with the clinical term selected, add any **Comments** as required and select **OK** to save.

 **Training Tip** - You can workflow a scanned document from **Vision 3** by creating a task and attaching the document to it, see [Creating a Task](#) on page 25 for details.

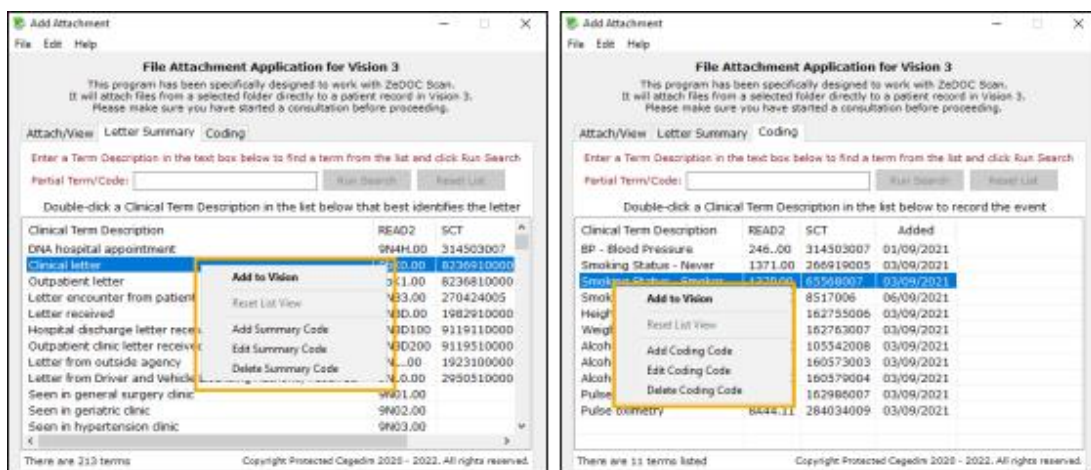
## Updating the Term Description List

When you are adding a scanned document in **Vision 3** as an attachment, you must select a **Term Description** from the **Add Attachment** screen:



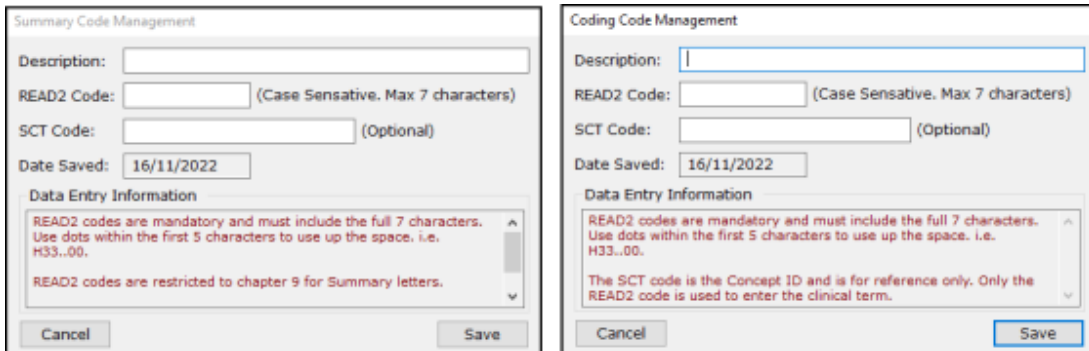
To update the list available:

- From the Add Attachment screen, select the tab required:
  - Letter Summary** - Select for recording the type of letter this is.
  - Coding** - Select for recording the clinical terms within the letter.
- Right click within the available list and select as required:



- Add to Vision** - To add the highlighted Description Term to the patient record.
- Reset List View** - Not available.
- Add...** - To a new Description Term to the list.
- Edit...** - To update the highlighted Description Term.
- Delete...** - To remove the highlighted Description Term from the list.

3. If you select to **Add** or **Edit** a Description Term, the appropriate **Code Management** screen displays:



The image shows two side-by-side screenshots of software screens. The left screen is titled 'Summary Code Management' and the right is 'Coding Code Management'. Both screens have the following fields: 'Description:' (text input), 'READ2 Code:' (text input with '(Case Sensitive. Max 7 characters)' below it), 'SCT Code:' (text input with '(Optional)' below it), and 'Date Saved:' (text input with '16/11/2022' entered). Below these fields is a 'Data Entry Information' section with a scrollable area containing red text instructions. At the bottom of each screen are 'Cancel' and 'Save' buttons. In the 'Coding Code Management' screenshot, the 'Save' button is highlighted with a blue border.

Complete as follows:

- **Description** - Enter the Read Description.
  - **READ2 Code** - Enter the full Read code required, remember the full stops and synonyms where appropriate. Guidance is provided in the **Data Entry Information** section.
  - **SCT Code** - If known you can enter the SNOMED CT term here.
4. Select **Save** and then repeat if required.



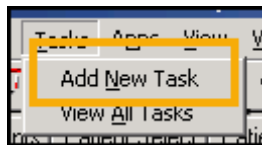
## Creating a Task


You can workflow a scanned document from **Vision 3** by creating a task and attaching the document to it. To create a task and add an attachment:

### Tasks

If you use **Tasks** as your task management system:

1. From **Consultation Manager**, select the patient in the usual way.
2. Select **Tasks - Add New Task**:

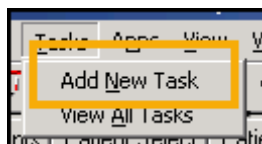


3. **Tasks** automatically opens, the **New Task** screen displays and the selected patient details populate automatically.
4. Select the **Recipient(s)** and complete the **New Task** screen as required, selecting **Attach** , navigating to and selecting the scanned document required.

### Daybook

If you use **Daybook** as your task management system:

1. From Consultation Manager, select the patient in the usual way.
2. Select **Tasks - Add New Task**:



3. **Daybook** automatically opens, the **Issuing New Task** screen displays and the selected patient details populate automatically.
4. Tick **Attached to document** and select the document required.



## Viewing a Scanned Document in Vision 3

To view an attachment on a patient record:

From **Consultation Manager**, with the patient selected, you can either:

- Locate the entry from the **Journal** tab, or
- Select **List – Attachments**, or
- From the **Navigation Pane**, select **Miscellaneous - Multimedia Attachments**.

Once you have located the entry required, either:

- Right click on the attachment, select **Item View** and then **View** , or
- Double click on the item and select **View** .

Close the document once you have finished and then select **Close** to close the **Attachment - Display** screen.