



**Electronic Document and Records
Management System (EDRM)**

**Document Viewer Module
User Guide**

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Revisions and Distribution

Revision	Summary of Changes	Author	Date
1	Initial creation of document	Paul Glock	09/06/2015
..
2	Content optimised for MKUH	Andrew Phelps	24/02/2019

1 Document Viewer

The viewer provides the facility to view full pages and navigate documents using thumbnails. There are various features that help to clarify document context. For example by magnifying a portion, or removing blank pages.

1.1 Viewer controls

Viewer controls are displayed in the top part of the viewer, as illustrated below.

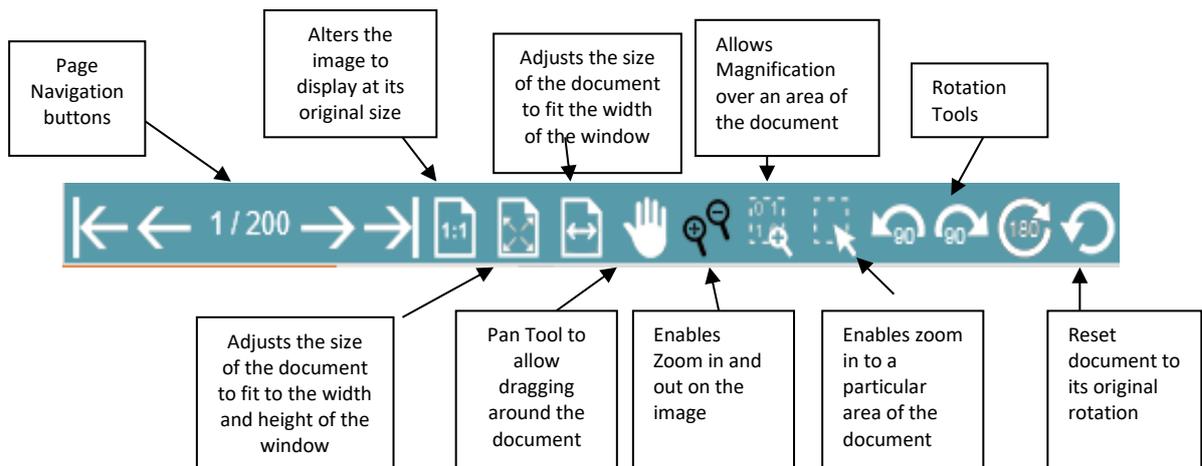


These controls provide a range of facilities for navigating and viewing a patient record. Depending on the configuration for your site, and different user permissions, some of these cards may not be displayed.

Some controls are simple, other controls initiate more complex functions. These more complex functions are described further in separate sections below.

1.1.1 Document Controls

A range of document navigation and view manipulation tools are normally available to all users. These are summarised in the following diagram and described individually in the table below.



Control icon	Control name	How to use it
	Page navigation	Click the arrows to move between pages in the current document. The arrows mean (left to right): first page, previous page, next page, and last page. The figures in the middle show where the currently displayed page is located in the current document, in this case page 3 of 400.
	One-to-one	Click to display the current page with one pixel per pixel of the original image. This image is usually larger than the view panel. The top left corner is displayed initially; use the pan control or scroll bars to move around the image. Double Clicking on this icon will retain the setting for the entire document (See also the Zoom control.)
	Best fit	Click to display the current page so that it is all visible in the view panel. There are no scroll bars in this view. Double Clicking on this icon will retain the setting for the entire document
	Fit width	Click to display the current page so that it occupies the whole width of the view panel. A vertical scroll bar is provided. Double Clicking on this icon will retain the setting for the entire document
	Pan control	When this control is selected, click and hold the left mouse button then move the mouse to drag the page image in any available direction. The scroll bars show the relative location of the visible part in the view panel within the current page.
	Zoom control	When this control is selected, click the left mouse button to zoom in, and the right mouse button to zoom out.
	Magnifier	When this control is selected, the mouse pointer displays as a magnifying glass icon within the page image. Click and hold the left mouse button, and a region centred on the mouse pointer is displayed in a circle nearby, at one pixel per pixel of the original image.
	Zoom area	When this control is selected, the mouse pointer displays as a cross-hair icon. Click and drag to draw a rectangle within the page image; on releasing the mouse button the page is displayed in one-to-one view with the selected area positioned at the top of the view panel.

Control icon	Control name	How to use it
	Rotation controls	Click on any one of these controls to rotate the view of the current page in the direction and amount shown. The result is a best-fit view of the current page displayed in the appropriate orientation.
	Reset page	Click to reset this page to a best-fit view in its original orientation.
	One-page view, two-page view	The patient record viewer will open in one or other of these. Click on the controls, to move to the other layout. After selecting a full-screen view (see below), one of these controls will be provided to reset the viewer from full-screen to your usual one page or two-page layout.
	Compare	Click to open a two-page comparison view where each page can be individually selected from the thumbnails, where zoom & pan apply to each displayed page separately. Drop down lists allow you to select another set of documents to load into the left viewer, while the right viewer remains independent of these controls and only displays the document that was originally loaded in the single page mode.
	Full screen	Available in one-page view only; expands the one-page view across the whole window occupied by the application (not the full computer screen). Useful for viewing wide documents.
	All thumbs	Click to provide an extended thumbnail view that fills all the area normally occupied by the thumbnails and the page view panel. See section on Thumbnails below.
	Bookmark controls	Controls for Bookmark functions. See section on Bookmarks below.
	Hide blanks	This control shows and changes the “hide blanks” state of the viewer; the three possible states are shown. See also section on Hide Blanks below.

1.1.2 Shortcut Keys

There are a number of supported shortcut keys when navigating the documents. These are listed below

Function	Shortcut Key
Next Page	SHIFT <
Previous Page	SHIFT >
Zoom In	SHIFT Z
Zoom out	SHIFT X
Switch to Pan Tool	SHIFT P
Switch to Magnify Tool	SHIFT M

1.2 Bookmarks

The bookmarks function allows a user to mark a page within a document and give the bookmark a name. A bookmark enables immediate access to the bookmarked page with very few clicks in the viewer. A bookmark will be Personal (available to the user who made it).

The bookmark controls within the viewer are security driven and therefore a user may not see all of the buttons described below.

There are 3 icons and a single dropdown shown below.



The icons are, in left to right order: Add Bookmark, Remove Bookmark, All Bookmarks.

When the Add Bookmark button is clicked a popup will appear allowing the user to create, name and even add an expiry date to a bookmark.

Add Bookmarks ?

Name

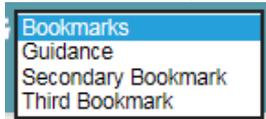
Bookmark Type Personal ▼

Expiry Date DD/MM/YYYY

Save Bookmark

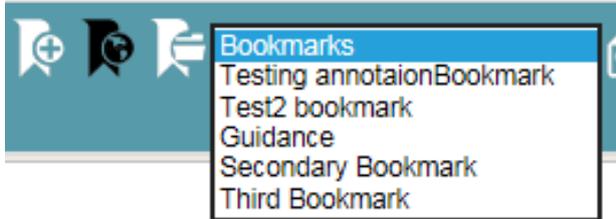
Whilst most fields are mandatory, the 'Expiry Date' is not a mandatory field. If no date is selected then the bookmark will not expire.

When navigating the system, the user can select the dropdown for bookmarks and see any pages already bookmarked within that section of the record. Clicking the bookmark in the dropdown takes the user directly to the bookmarked page.



The All Bookmarks icons allow the user to select which bookmarks they want to use. The significance of these controls in a particular organisation is dependent on the CCube EDRM configuration.

The All Bookmarks feature enables all Personal Bookmarks to be displayed in a single list.



Note that when All bookmarks is selected the remove bookmark icon is no longer available.

To delete a personal bookmark, select the appropriate Bookmark, and click the "Delete" button;

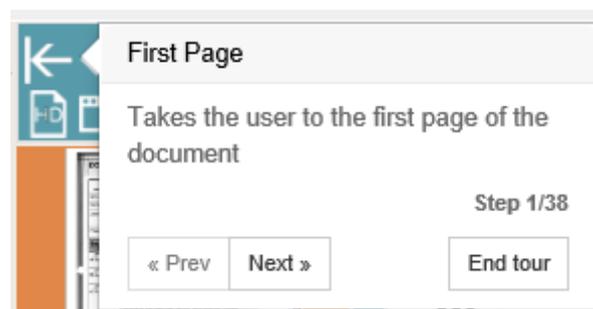


1.3 In Context Help

In Context Help provides a facility for CCube EDRM users to view on screen help and description of the different options available to them in the Search panel and Viewer tool bar. The In Context Help can be accessed via the question marks located in the top right-hand side of the panels:



When accessed, a help window will appear, detailing the title and description of a feature. It will also point to the button for the feature being detailed.

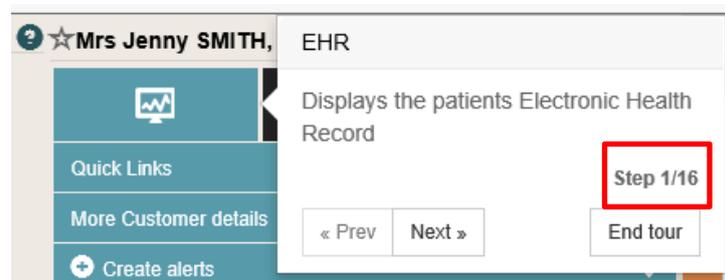


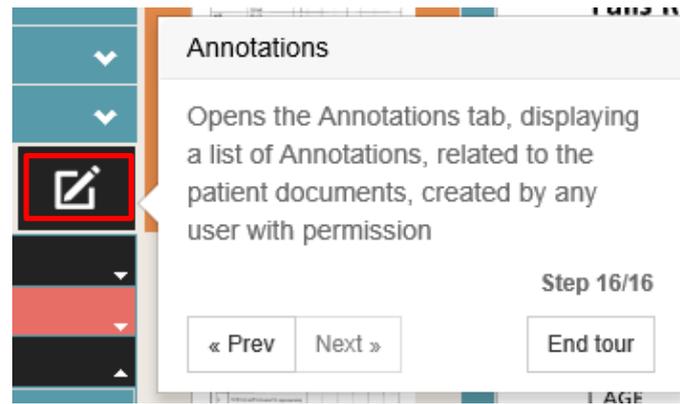
There are 3 buttons provided on the help window:

- “Prev” - Move to the previous feature
- “Next” - Move to the next feature
- “End tour” - End the tour.

The “Prev” button will be disabled if the user is at the beginning of the In Context Help tour. Likewise, the “Next” button will be disabled if the user is at the end of the In Context Help tour.

There is now also a counter which shows the current position of the tour.





The help window will stay on screen until the user either ends the tour or navigates to another area of EDRM (i.e. Appointments).

1.4 Hide Blanks

To meet legal requirements for preserving evidential integrity while scanning documents both the front and back of a document are scanned which leads to a high proportion of blank pages. The hide blanks function allows a user to hide these blank pages.

WARNING: Hide Blanks is designed around calculating differences between white and black pixels. Often settings are set at a level so as to remove hole punch marks and marks creating during scanning. This can lead to documents not being shown, and therefore caution must be exercised when using this feature.

There are 3 blanks levels

1. Off
2. Hide Blanks Normal
3. Hide Blanks Aggressive

When a user clicks between blank modes they will be notified as described below.



Warning: Hide Blanks Normal Mode
Blank pages have been hidden!



Warning: Hide Blanks Aggressive Mode
Blank pages have been hidden!

The warning message will remain on screen until a user clicks on them. The warning message will then disappear.

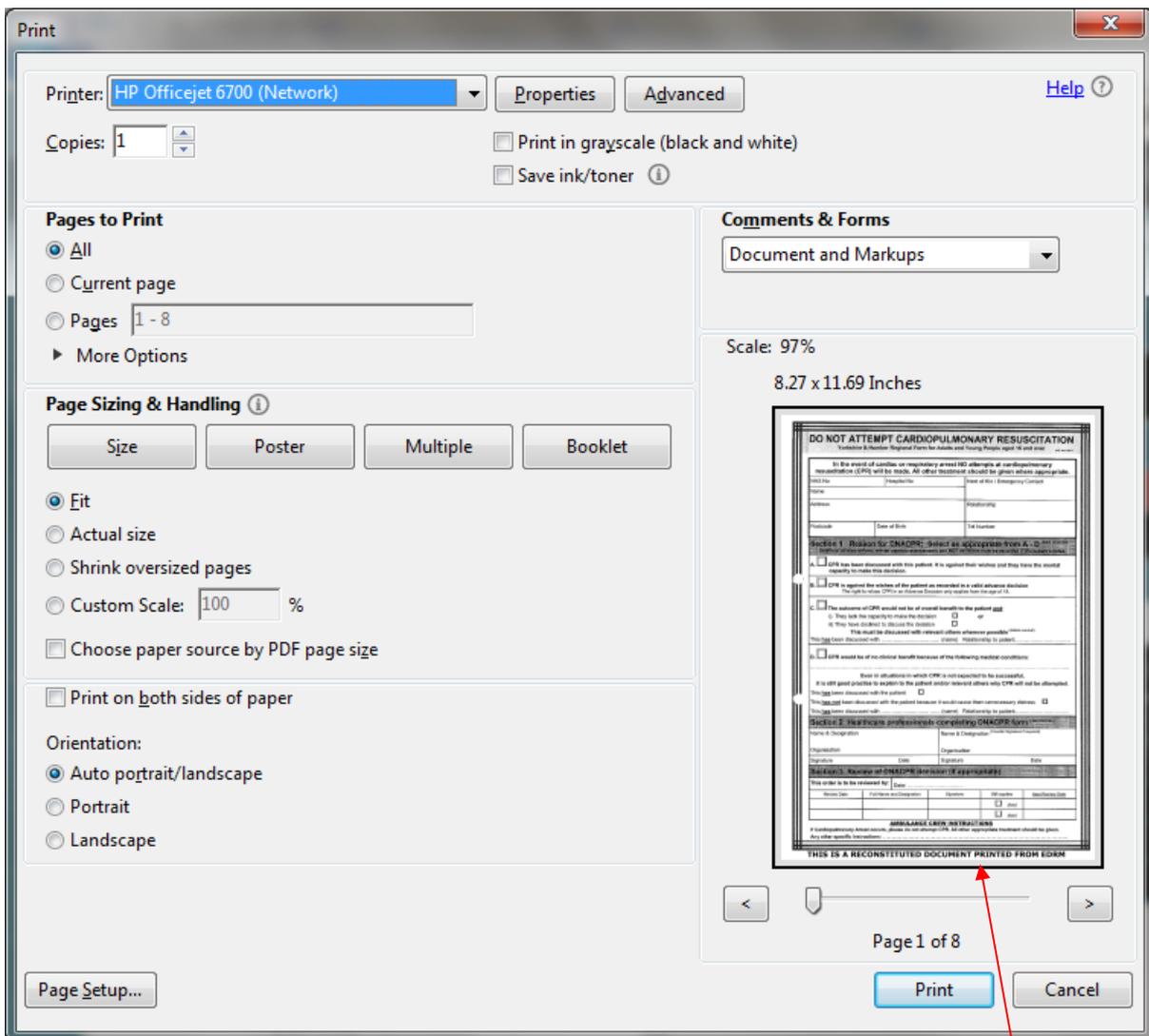
1.5 Print Control

The viewer can be configured to allow a user to print either a single page or a selection of pages.



The icon on the left controls a 1-page print and will print the selected page. The icon on the right will allow printing of any image within the viewer.

Clicking the print button will bring up a print dialogue (this will vary depending on the type of printer the user has).



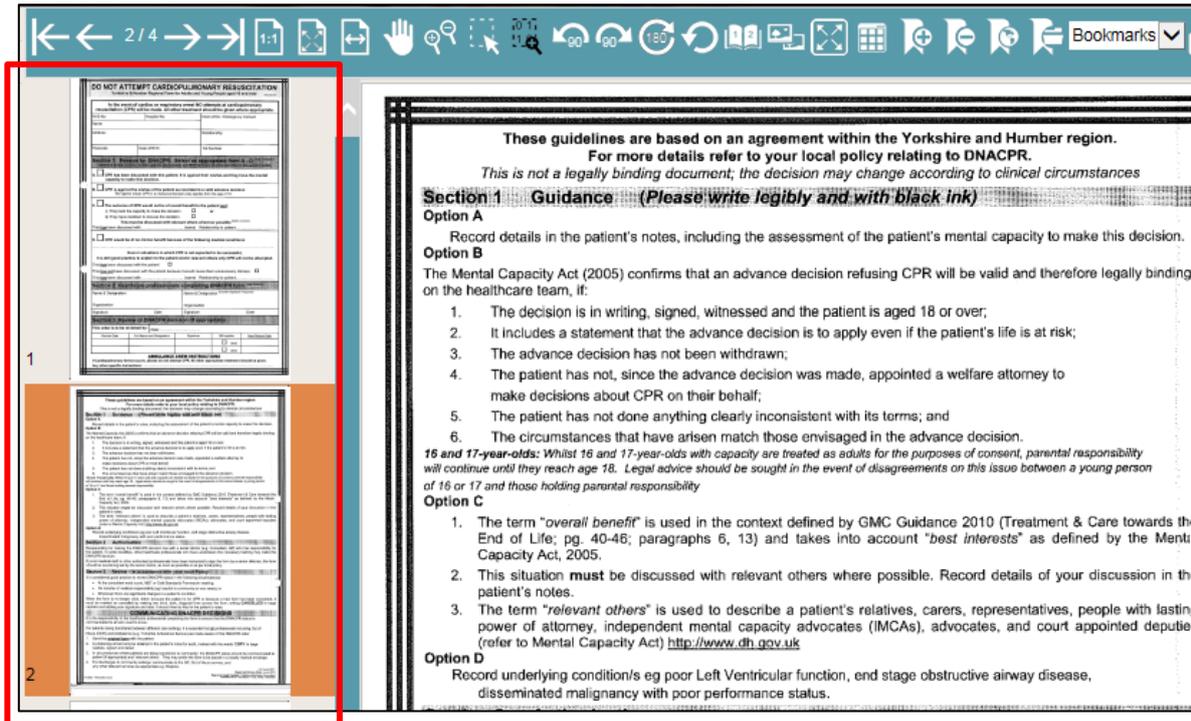
At the bottom of the printed page a water mark will automatically be printed:

THIS IS A RECONSTITUTED DOCUMENT PRINTED FROM EDRM

This is a configurable message that clearly identifies printed copies of documents that are held and managed in the EDRM, and in particular aims to prevent printed documents inadvertently making their way back to a scanning bureau for re-scanning.

1.6 Thumbnails

A thumbnail is a smaller version of the main image. Thumbnail images of pages are provided to help navigation through the record. They are always displayed down the left-hand side of the viewer.



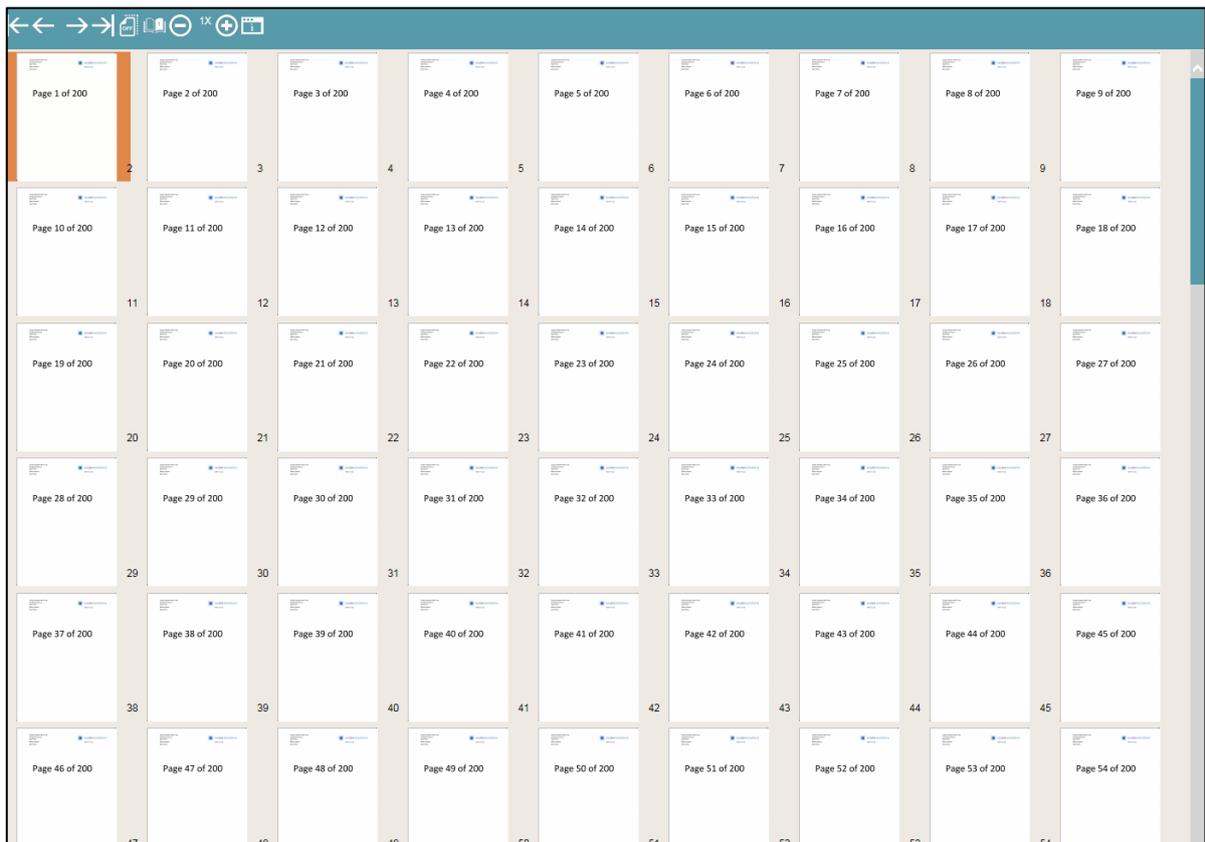
A user can scroll up and down the sequence of thumbnails to navigate through the pages, either using the navigation bars on the right hand of the thumbnail display, or the wheel on the mouse. At any time, the page count shows the position of the current page in the total number of pages shown in the list.



A thumbnail is useful for quickly identifying recognisable content, so the CCube EDRM provides a thumbnail mode where all of a document panel in the viewer is used to display thumbnails. Thumbnail mode is selected by clicking on the thumbnail icon as shown.



Once in thumbnail mode the user can scroll swiftly through all the images available. A double click on an image displays the page in the viewer. The page range in each column of thumbnails is displayed at the bottom of the panel, and the 'back' and 'forward' buttons at each end of the page ranges provide a way to step through the list of thumbnails one column at a time.



The size of the thumbnails displayed can be adjusted by clicking the magnify icons;

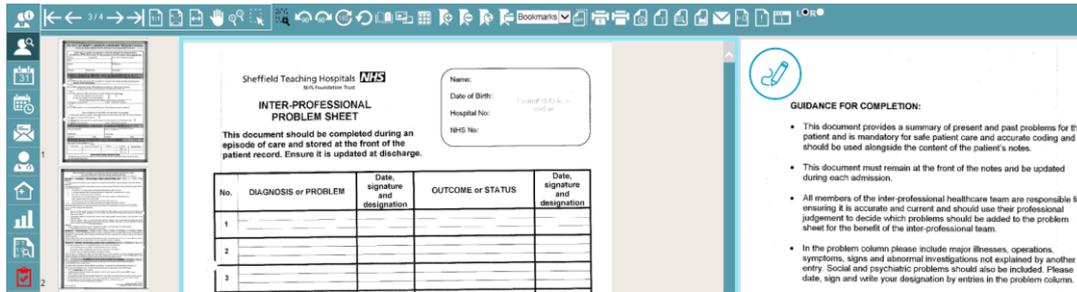


1.7 Two Page Mode

The viewer supports displaying two pages at once, a feature known as “two-page mode”. This mode is enabled by clicking the following button:



In 2-page mode, the viewer opens 2 pages side by side, giving the feel of an open book or turning pages in a file.



Many of the viewer controls only make sense for a single document and therefore a user will need to use the Left and Right buttons to make the left hand or right page current, known as left hand & right-hand mode.



Double clicking on the other page image will also dynamically switch the user between left and right modes.

The icons that appear within a box can be applied to either page in view without the need to switch right and left modes.



When using the page navigation arrows instead of moving onward a single page at a time like it does in single page mode it will move onward two pages at a time as if flipping the page of a book.

A unique feature in both the two-page mode & compare mode is the ‘Sync Zoom & Pan’. Enabling this option allows for both documents to be zoomed in at the same time and for the panning to also occur at the same time, using the keyboard arrow keys. Simply clicking the icon again, or another icon will disable this feature.



To exit two-page mode click the 1-page mode icon.

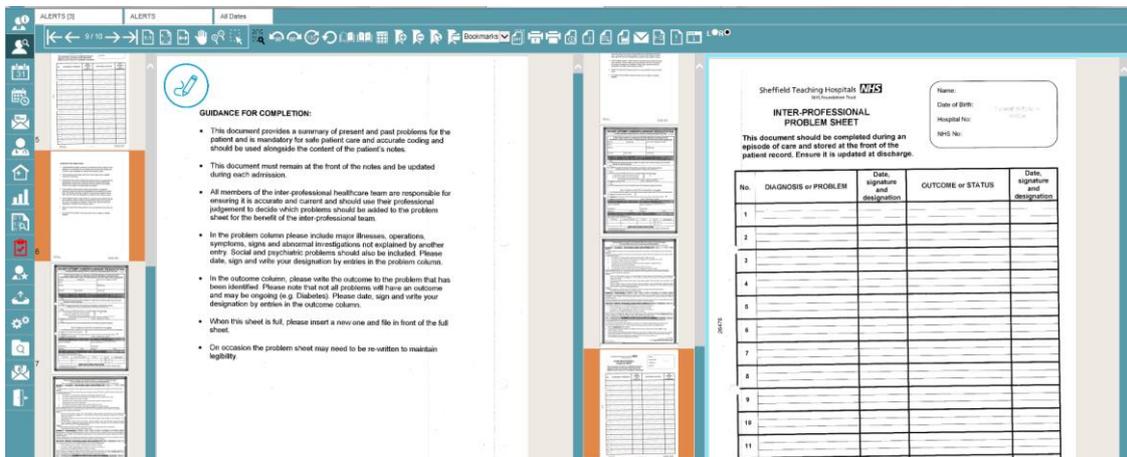


1.8 Compare Mode

Compare mode is activated by the compare mode button.



Once Compare mode is activated the user has the ability to compare two distinct parts of the health record. Initially, the view will default to the same document on both sides until further selection takes place.



Compare mode is similar to 2-page mode. The mode icons show clearly which mode is active.

Many of the viewer controls only function for a single document and therefore a user will need to use the Left and Right buttons to make the left hand or right page current, known as left hand & right-hand mode.

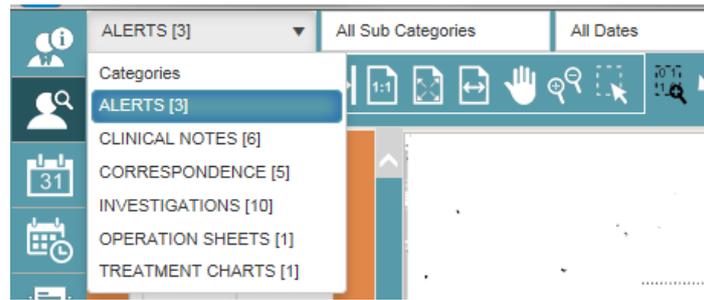


Double clicking on the other page image will also dynamically switch the user between left and right modes.

The icons that appear within a box can be applied to either page in view without the need to switch right and left modes.



Using the dropdown selections enables two different parts of the health record can be compared.



By default the left hand viewer will alter when the dropdowns are changed.

1.9 Reporting Misfiled Documents

When a user navigates the system and finds a document has been misfiled there is a simple facility available to report the document to a records administrator. All that is required is to click on the “Report Misfiled Document” button:



A panel appears to select a user to report to and an option to add additional information about why the document was reported. If the system has been set up to email details of the misfile, the follow screen will appear.

Report a Misfiled Document ?

Additional Details (optional)

Report

When the user clicks ‘Report’ either an email will be sent to the system administrator, request corrective action.