

Installing EMIS LV Appointments with R2 of FlexaTrace (Modified Version using API)

NOTE – requires FT_RT2.55 or later (Client Release V50 i.e. OCX version 1.5.0.350)

Index

1. Introduction
2. Preliminaries
3. Install FlexaTrace Central
4. Install FlexaTrace Client
5. Configure FlexaTrace Client
6. Premises Option
7. Printing a Card
8. De-installing the FlexaTrace Client

1. Introduction

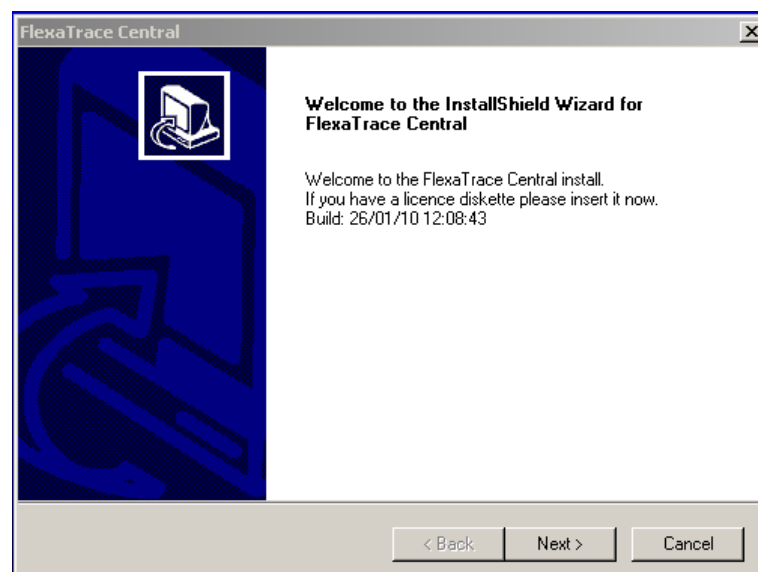
This version of the appointment card add-on for EMIS LV can optionally use the EMIS API to retrieve appointment data. The original version was passed appointment data from LV when a user pressed the Shift F6 option to print a card. This is still supported but may be enhanced by obtaining additional data (demographics and/or data for additional appointments). This prints data for the patient in the current slot being viewed. Alternatively, the new mechanism can directly obtain data via the API for the “current patient”. In this mode, due to limitations of the EMIS API, it can only print appointments up to 30 days in the future.

2. Preliminaries

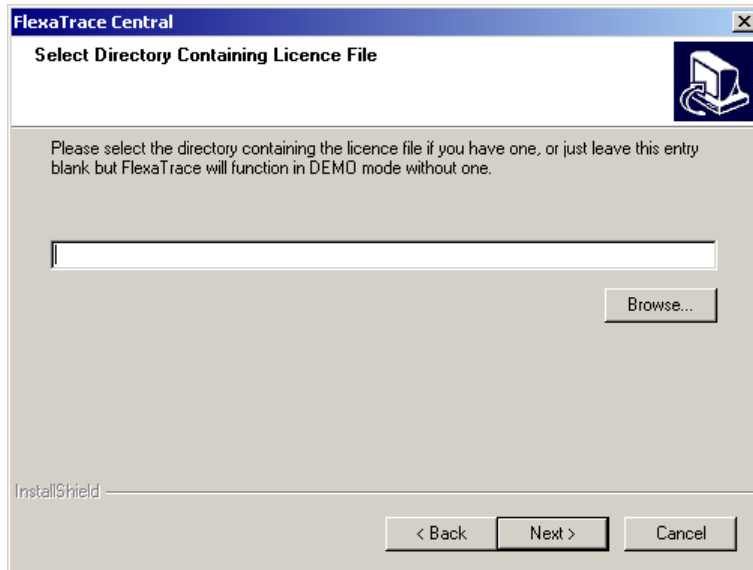
Install the label printer to be used with the EMIS LV Appointment system. If the printer is a Zebra EPL model, and this is to be used with the standard card media (black line mode sensing), download the font: Arial, bold, 12 point, 90Deg as font “a” with the Standard character set. NB - the font does not start to download until you click the OK on the window which claims the font has been downloaded! The download can take approx 30 secs on a serial connection so be sure to wait for it to finish before testing. Some experimentation with font size may be required as printers have been known to respond differently to the same font download.

3. Install FlexaTrace Central

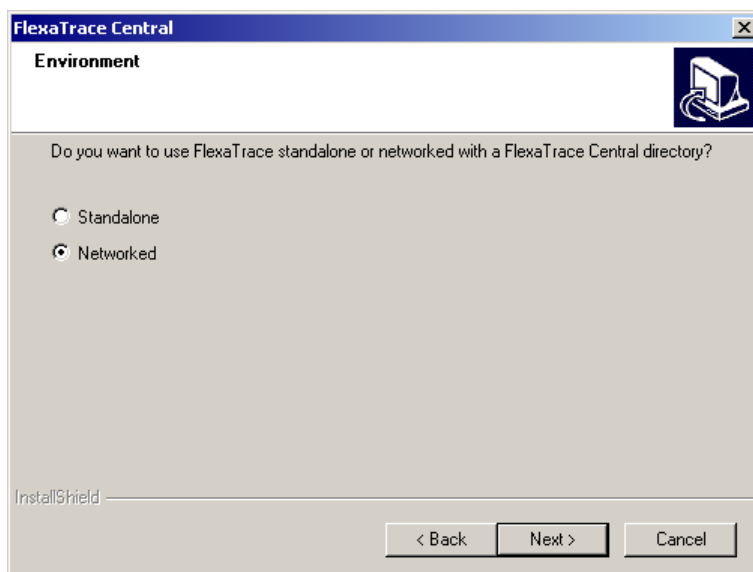
On the server, or first workstation if the server is not accessible, Install FlexaTrace Central by running setup.exe from the install folder.



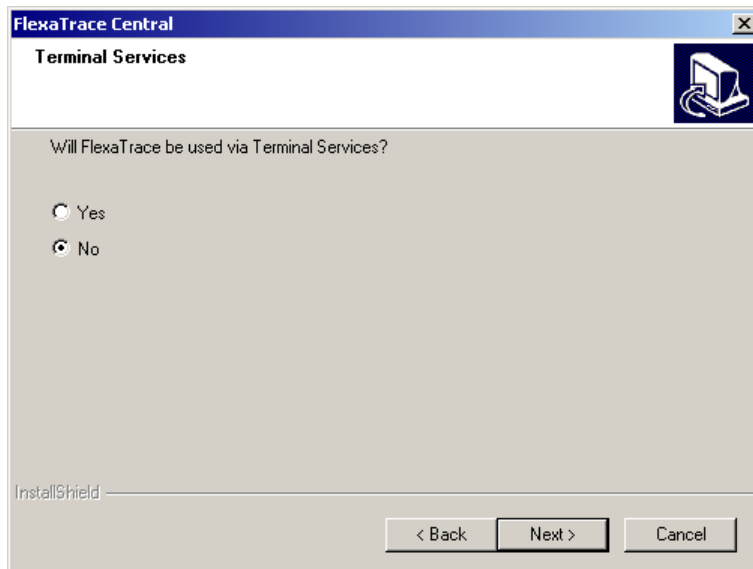
Click Next on the Welcome screen to continue installation.



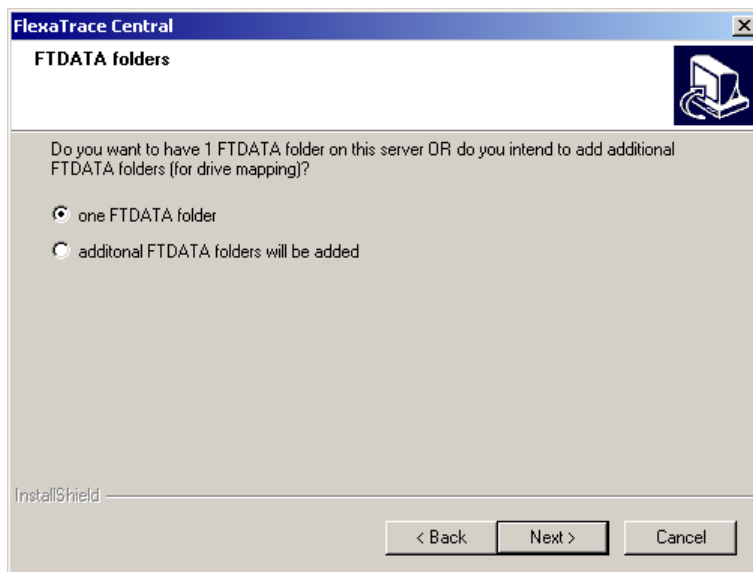
If a licence has been provided as a file “flexatrace.lic”, specify where it is located. If the licence is in the same folder as the setup.exe program for the FT Central installer it will be automatically detected and reported. If the licence will be applied later because it is in ASCII form or will be copied into the FTDATA folder, leave blank. In either case, click Next to continue installation.



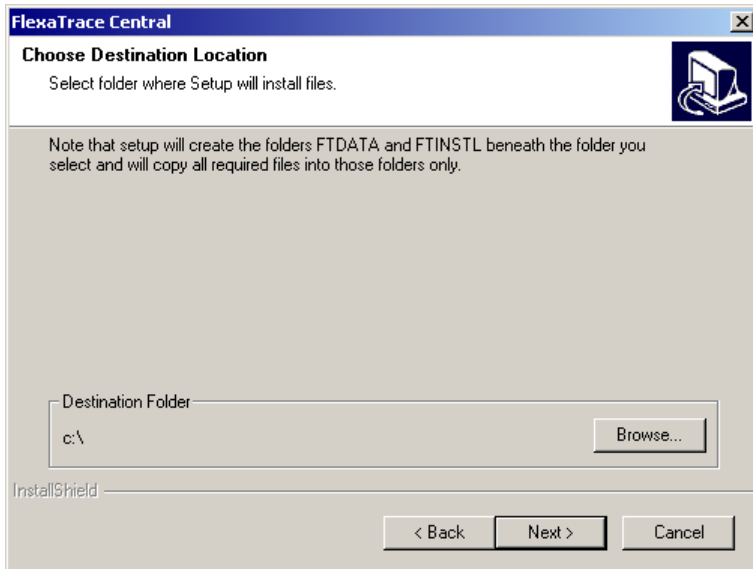
Select “Standalone” if you wish to install FlexaTrace simply on one PC. Select “Networked” if the central components will be shared by multiple PCs.



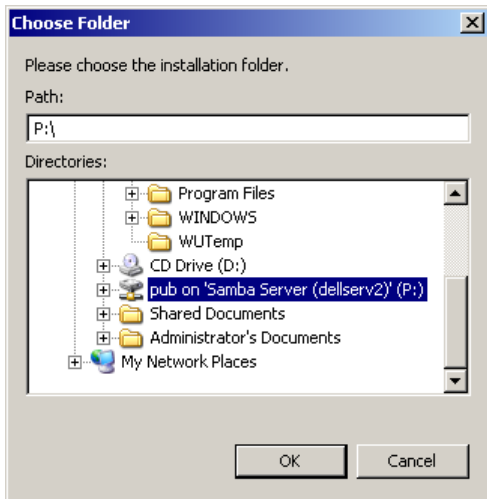
Specify whether FlexaTrace will be used via Terminal Services (or Citrix). If Yes is selected, the INI file specifying local preferences will be stored in the Windows folder of workstations. In the case of a Terminal Server client installation, the INI file will be copied to the Windows folder of each user who logs on to the terminal server and then in turn copied to another INI file called "ftrace.workstationname.ini". Each user on each workstation thus has multiple INI files, one for each workstation which they have logged on to.



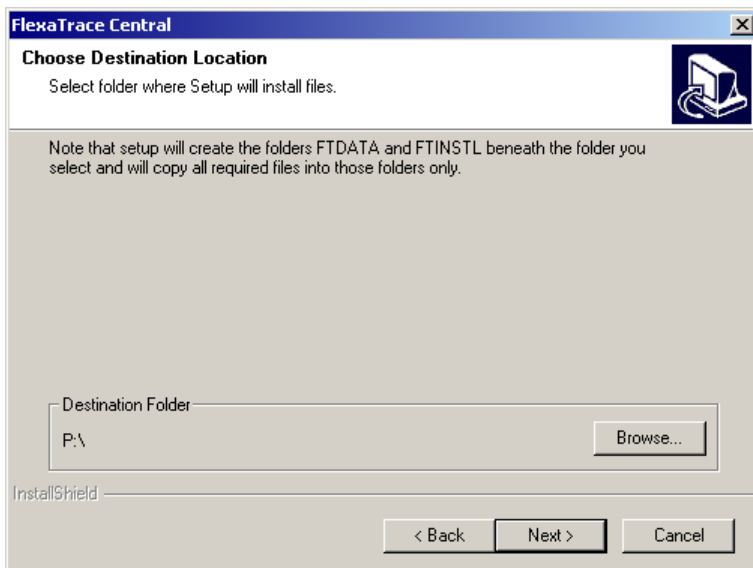
Select "one FTDATA folder" UNLESS the installer is being used to configure support for multiple practices on a server.



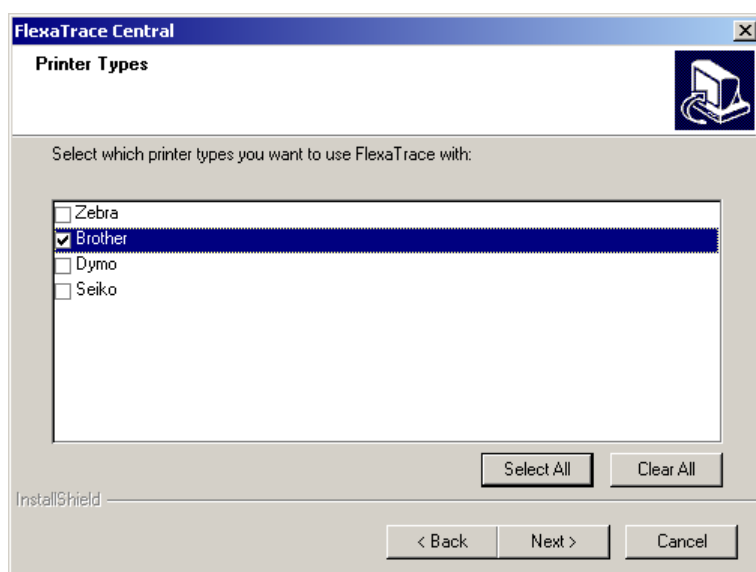
Specify the drive name or path to the location you wish to install the FTDATA and FTINSTL folders into. To specify an alternative to the default “c:\”, click on the “Browse” button.



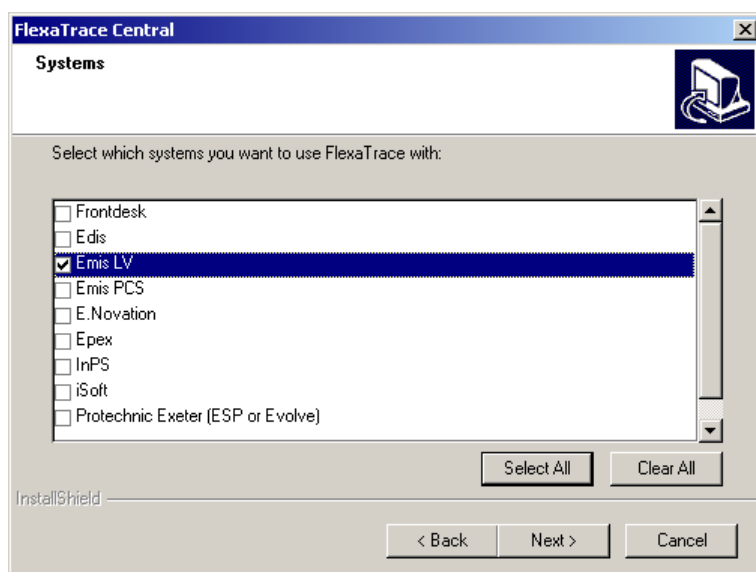
Browse to, or type in, the required path and click OK. NB, if the folders are to be stored within a pre-existing shared folder on a server or workstation, ensure that all users have rights to read and write to the FTDATA folder and files within it. Typically select the pre-existing folder called “Shared” on the EMIS server.



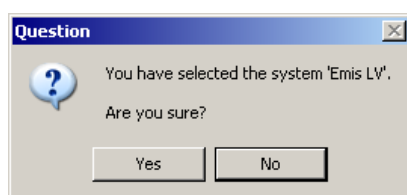
The required path is now displayed. If this is correct, click Next to continue.



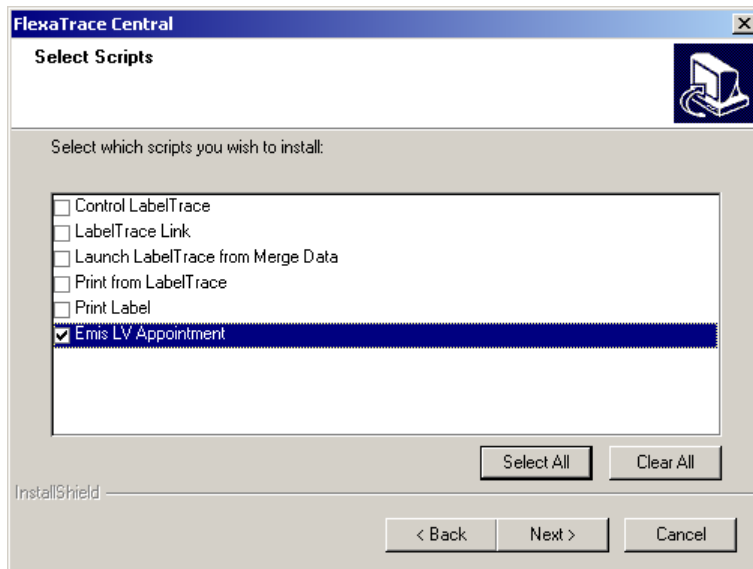
Now specify whether additional printer support is to be installed. Note that for Zebra EPL or ZPL (or other ASCII based printers) no additional support is required. The exception is if MetaPrinter templates are to be used to support e.g. TrueType fonts on the Zebra EPL printers. In this case tick the box for “Zebra”. If Brother, Dymo or Seiko SLP printers are to be used it is essential to tick the relevant box. This will cause the relevant printer support to be installed when the client is being installed. Click Next to continue.



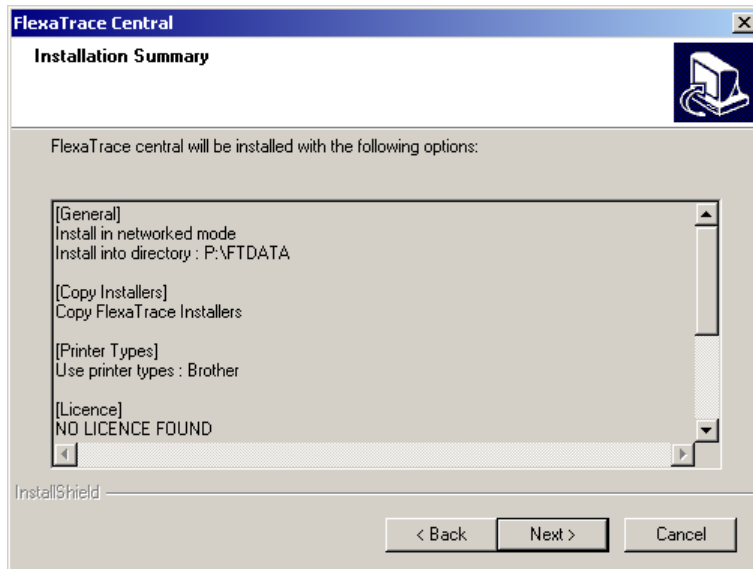
Now select Emis LV as the clinical system for which FlexaTrace scripts are to be installed. Click Next to continue.



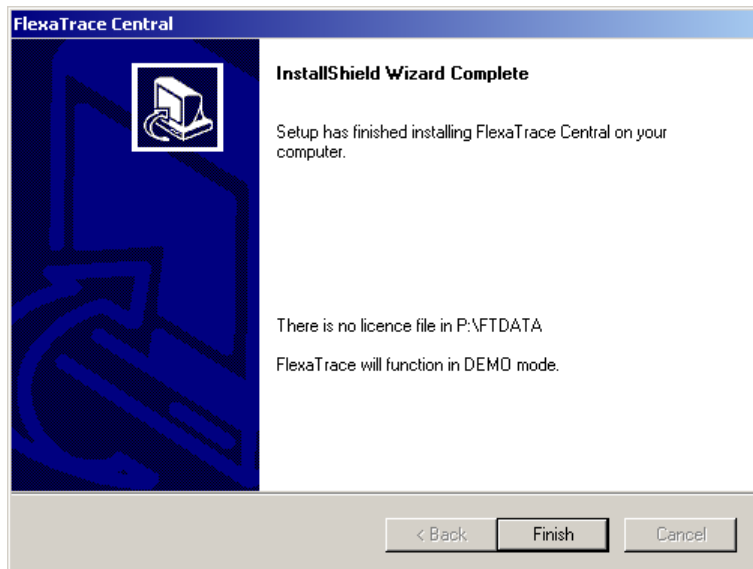
Click Yes to confirm your selection or No to go back and change it.



Select the “Emis LV Appointment” option to be installed and click Next to continue.



A summary of installation options selected is presented for review. Click on Next to continue. The installation will now proceed.



After completion, the final screen will confirm if the licence is correctly installed or is yet to be applied. Click Finish to exit the installation.

4. Installing the FlexaTrace Client

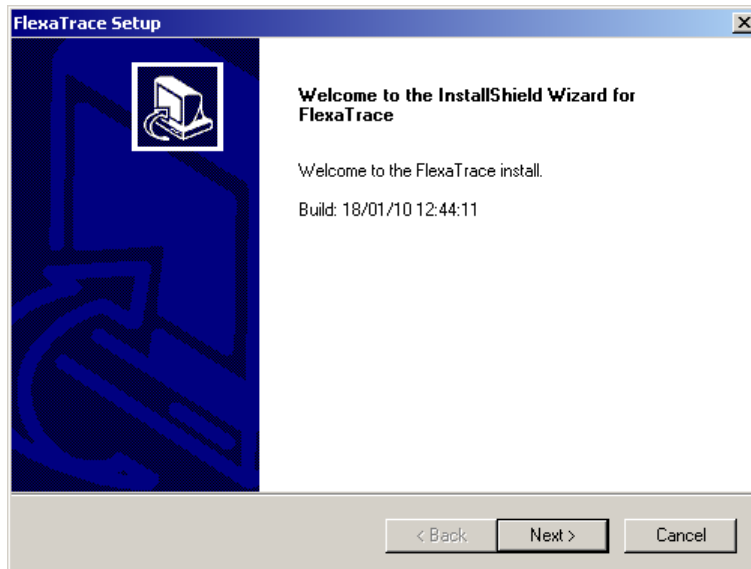
On the relevant workstation(s) install the FlexaTrace client by running setup.exe from the folder [\\servername\Ftinstl\ft_client_installer\Vxx](#)

or

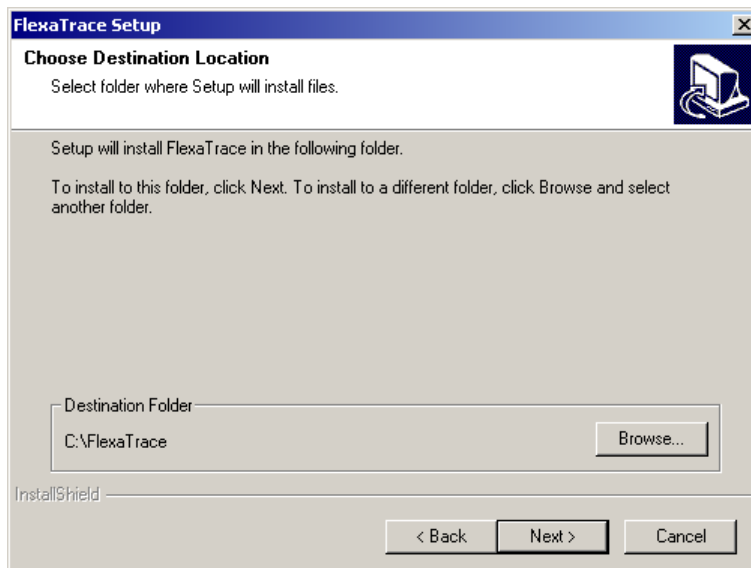
[\\servername\shared\Ftinstl\ft_client_installer\Vxx](#)

as appropriate

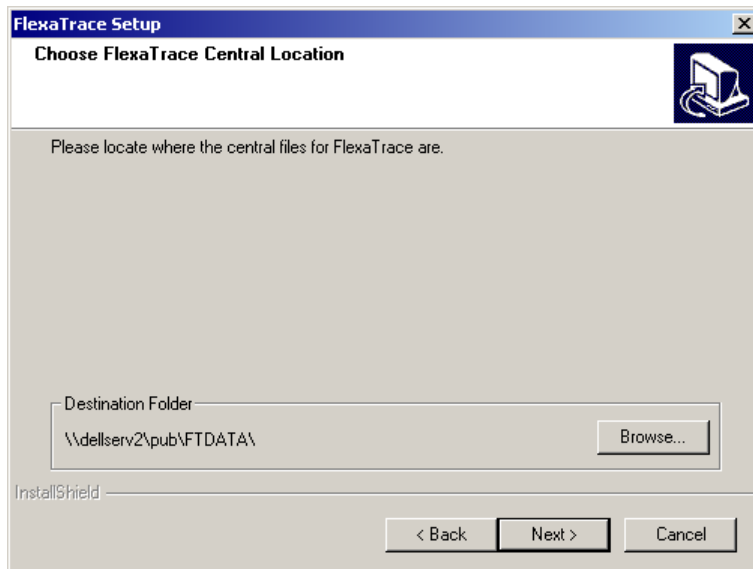
(where Vxx folder name indicates the version of the installer)



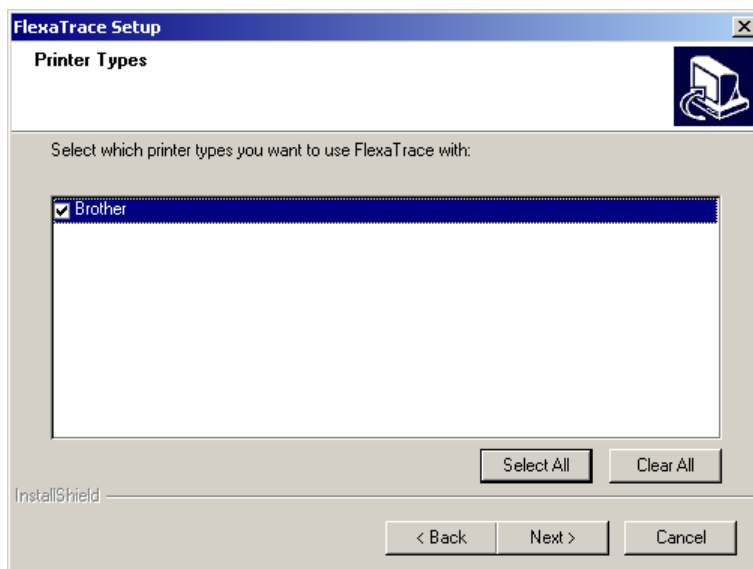
click on Next on the welcome screen to continue.



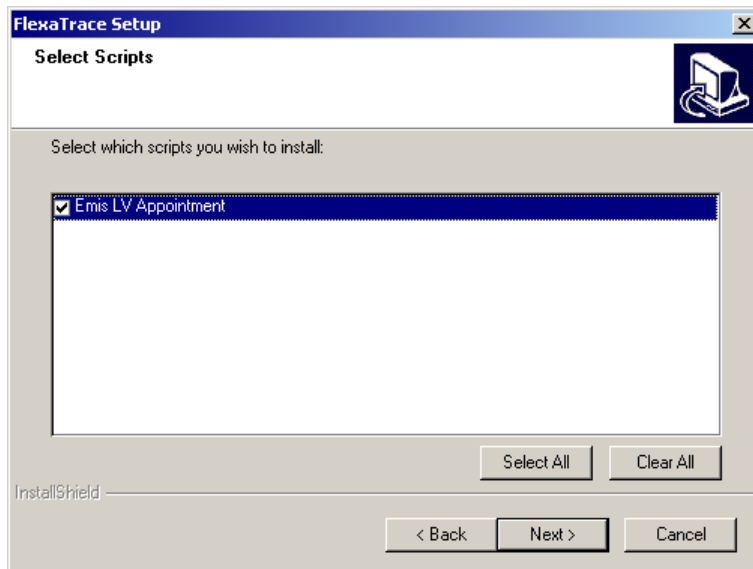
The default location for the FlexaTrace client program files is "C:\FlexaTrace". Click OK to accept that or use the Browse button to specify an alternative location.



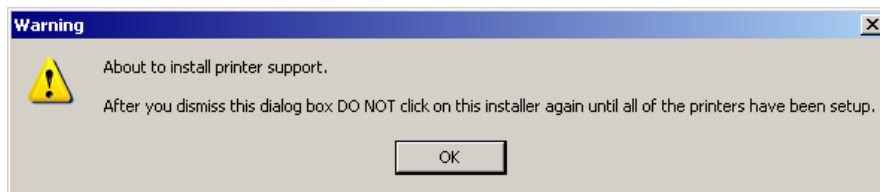
The default location for the central FTDATA folder is now shown. Normally this will be correct and so click on Next to continue. ONLY CHOOSE AN ALTERNATIVE IF YOU ARE SURE YOU KNOW THAT THIS IS APPROPRIATE.



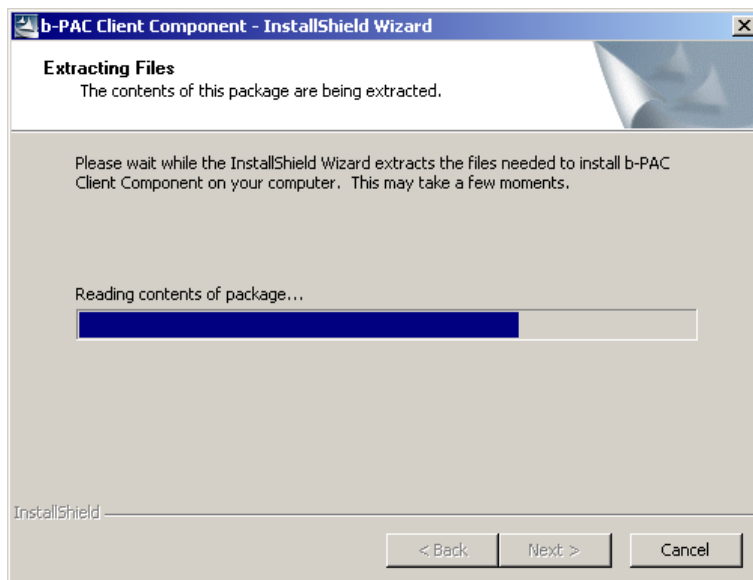
Now select the printers for which support is to be installed. Note that the list of available types consists only of those selected during the FlexaTrace Central installation. Click Next to continue.



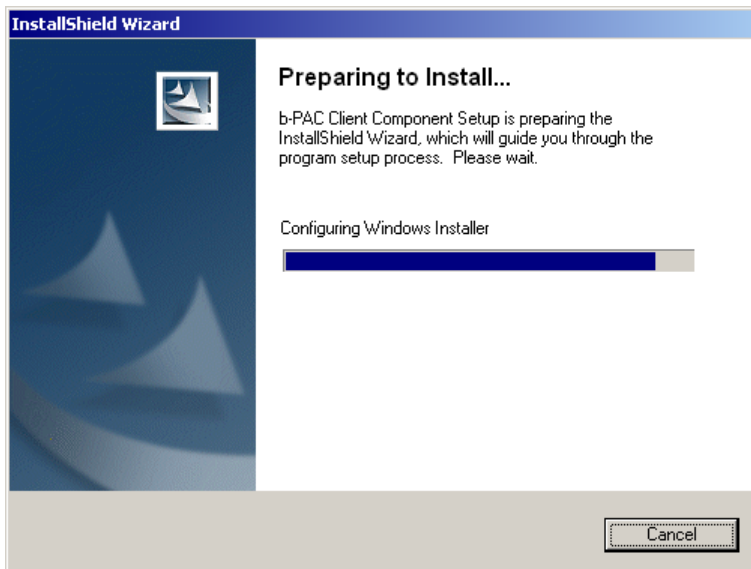
Select which scripts to install for this client installation. Note that the list of available scripts consists only of those selected during the FlexaTrace Central installation. Click Next to continue.



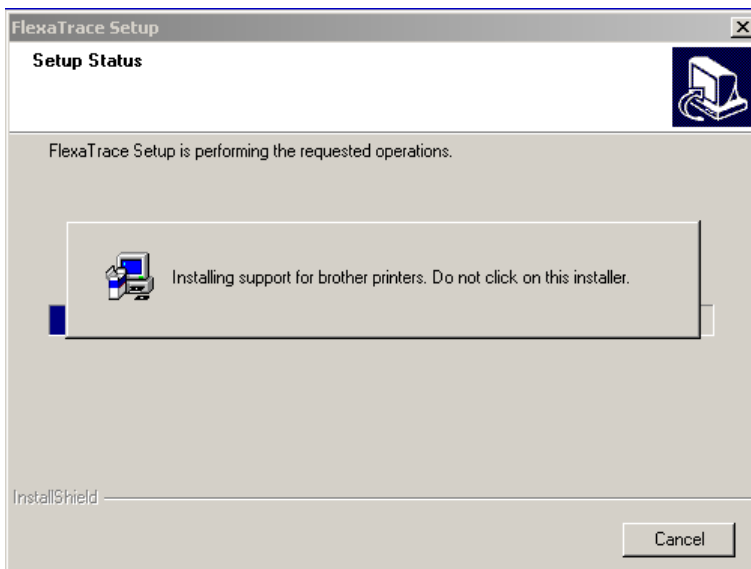
If any printer support has been selected then the above prompt will be displayed prior to installing printer support and at several points during the printer support installation process. Be sure to avoid clicking on the main FT installer until the printer support installer(s) have finished running. Click OK to start the printer support installer(s) running. The example below shows the "b-PAC" installer running – this supports Brother printers.



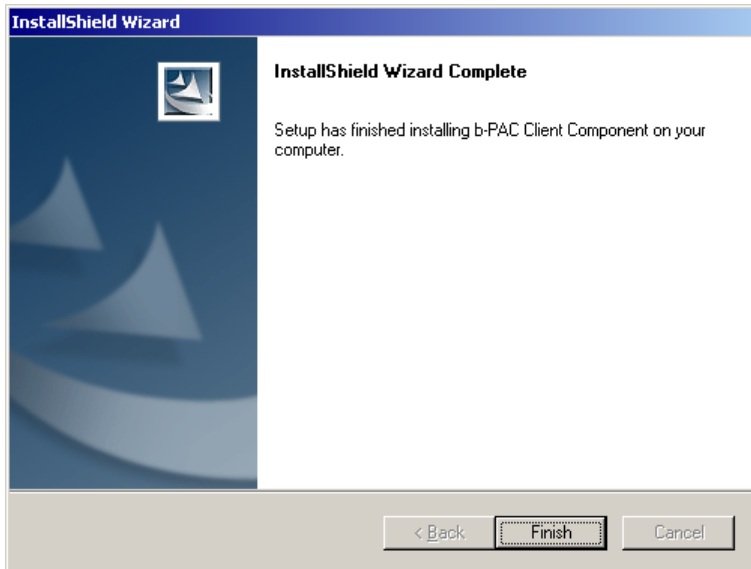
The support installers will start to run.



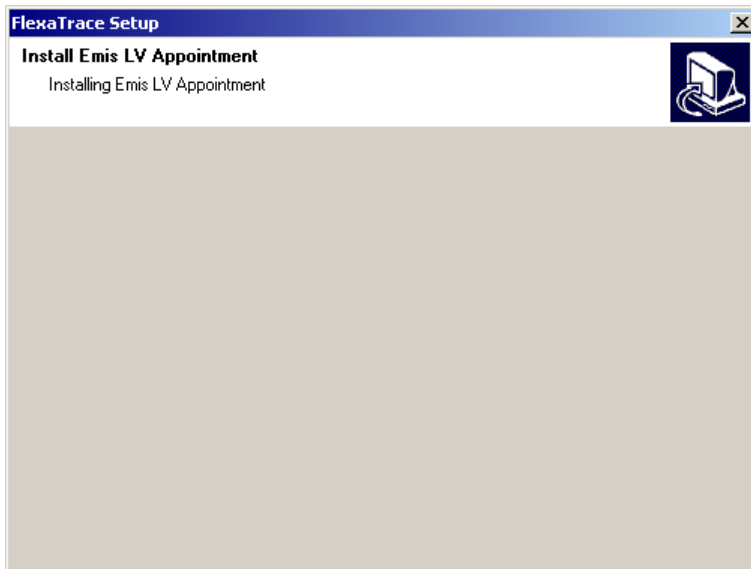
The installers present a number of screens, some of which may need to be acknowledged.



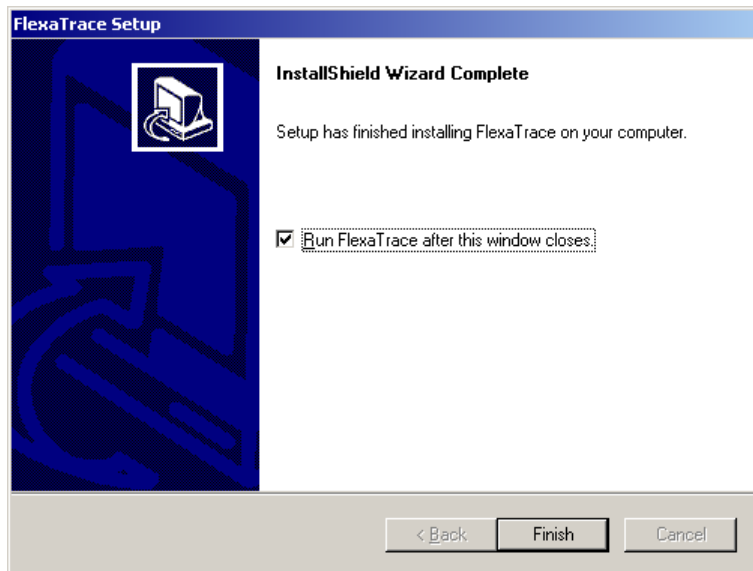
Note any message to avoid clicking on the main FlexaTrace installer.



when each printer support installer has finished running click “Finish” etc as appropriate. The main FlexaTrace installer will then continue.



The installer will now confirm installation of the script with the message above then continue.



The final installation screen has a tick box to cause FlexaTrace to run on completion of the installation. Tick this box as appropriate and then click Finish to complete the client installation.

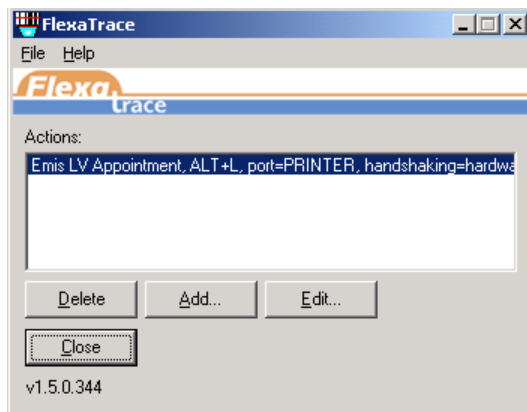
5. Configure FlexaTrace Client

It is now necessary to configure the FlexaTrace system. If not running, select the program option “Start > All Programs > QuickTrace > FlexaTrace > Start”. Open the FlexaTrace Client which runs in the system tray by right clicking on the icon and selecting “Open”.

FlexaTrace in the System Tray



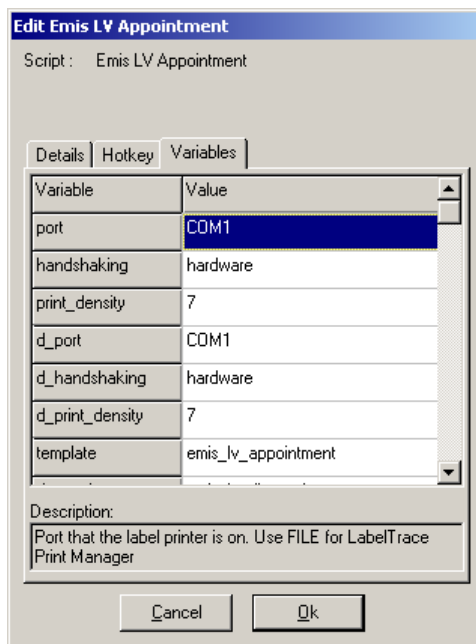
Alternatively select the program option “Start > All Programs > QuickTrace > FlexaTrace > Configure”.



If a licence has been supplied in ASCII form, on the first workstation, paste it into the “Help > About > Update licence” window. NB you must restart FlexaTrace for the licence to be recognised.

Click on the “emis_LV_appointment” entry as shown above and then click Edit. (or simply double click the entry).

Set the required data for system parameters via the “Variables” tab. To change data for parameters, click on the current value. The current value will either change to a drop down list from which the required value may be selected or will permit keying in of required data. Click OK to save the settings. Note that variables are hidden if not relevant. Some variables reference a dispensing label printing function and may be ignored.



“Port”: set the appropriate port as required.

Handshaking: choose hardware or software (only available if selected port as COMn)

Print_density: set print density (only relevant for Zebra printers)

Printer: if port set as “printer” specify the label printer.

Path: if port set as “file” specify the folder in which to save the output files.

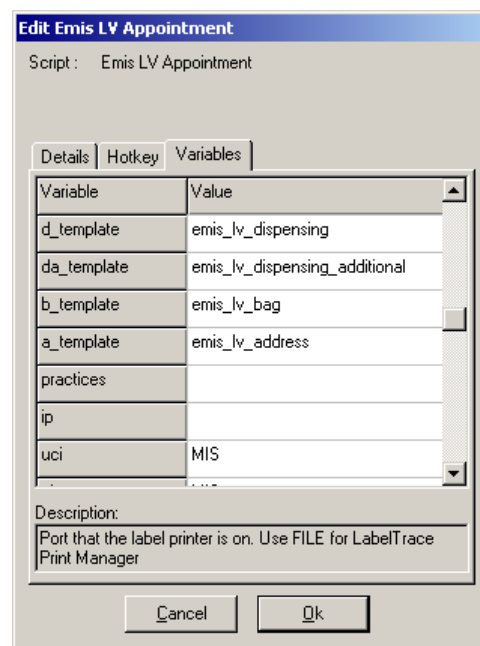
D_port: port for dispensing printing. choose hardware or software (only available if selected port as COMn)

D_handshaking: handshaking for dispensing printing. choose hardware or software (only available if selected port as COMn)

D_print_density: set print density for dispensing printing (only relevant for Zebra printers)

IP: if port set as IP enter the IP address and IP port as e.g. “192.168.1.30:9100”

Template: select the required template. Note that those with “brother” in the name are specific to Brother QL printers, similarly Seiko and Dymo. Those with no manufacturer name are for Zebra EPL printers. See below for listing of available templates.



“d_template”: main dispensing label template

“da_template”: additional dispensing label template

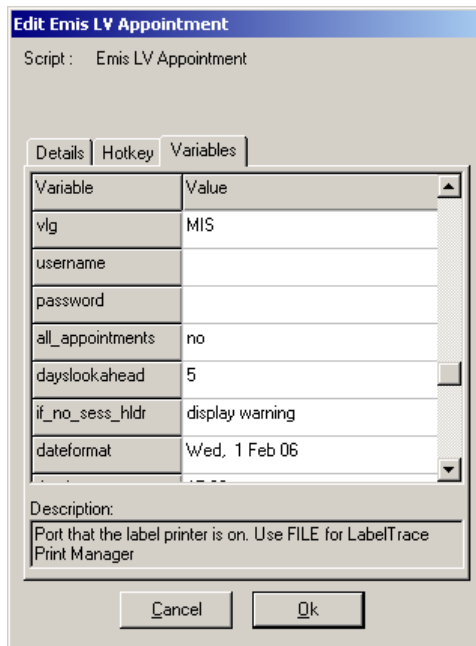
“b_template”: dispensing bag label template

“a_template”: dispensing address label template

“practices”: practiceID.

“ip”: the server IP address, as appropriate for the site

“uci”: as appropriate for the site



“vlg”: as appropriate for the site

“username”: enter a valid LV username.

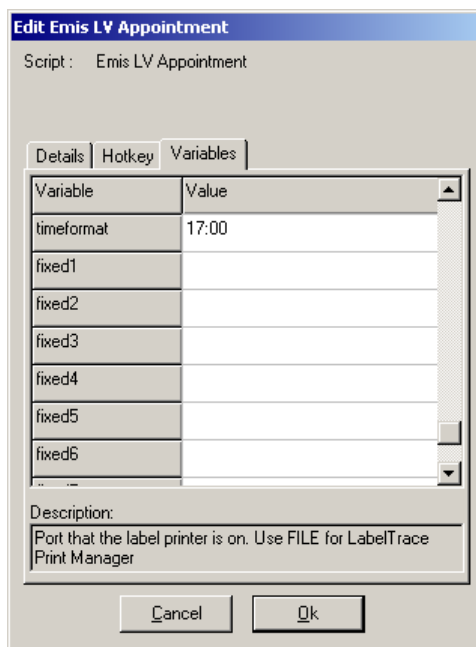
“password”: enter the corresponding current password.

“all_appointments”: specifies if only one or all appointments for a patient should be printed. when using the Shift F6 option to initiate printing.

“dayslookahead”: specifies how many days worth of future data to retrieve. (1-30, recommend 21)

“if_no_sess_hdr”: display/do not display a warning if no session holder exists for selected session.

“Dateformat”: how date will be presented by default (can be overridden by template modifier)



“Timeformat”: how time will be presented by default (can be overridden by template modifier)

“Fixed1”: first line of header on cards

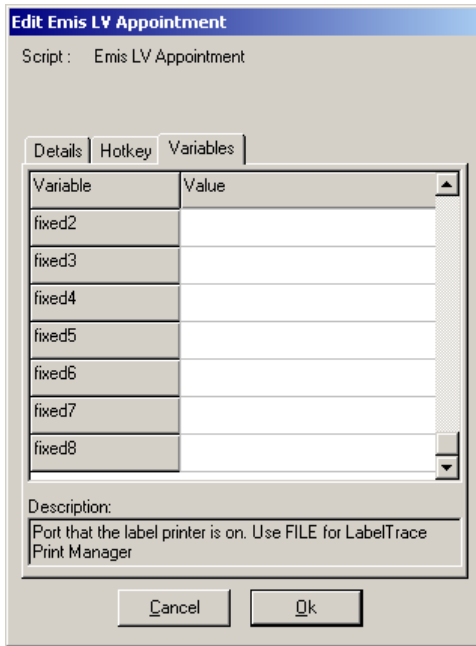
“Fixed2”: second line of header on cards

“Fixed3”: third line of header on cards

“Fixed4”: first line of footer on cards

“Fixed5”: second line of footer on cards.

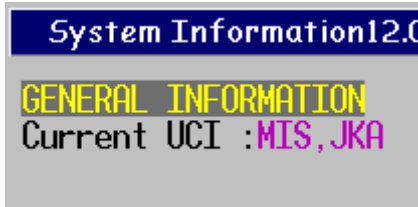
“Fixed6”: first line of header on labels



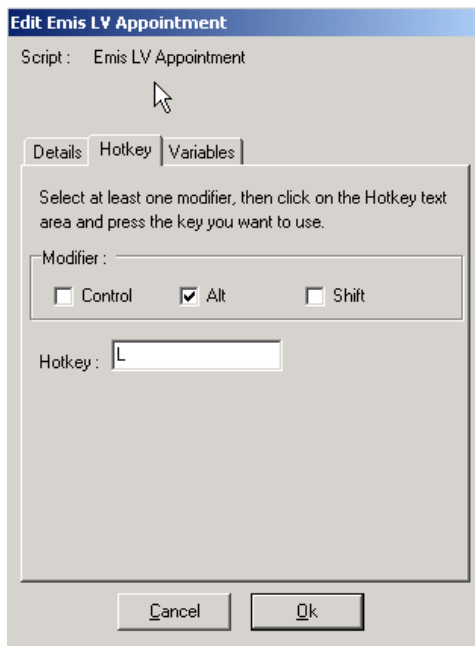
“Fixed7”: first line of footer on cards
 “Fixed8”: second line of footer on cards

NOTES

1. The server IP is obtained by using the LV client’s “Settings/Connections/OK/Network List” option to view the IP in use. The UCI and VLG values are obtained by using the SS/S menu options from the Main Menu in LV to see them as shown below.

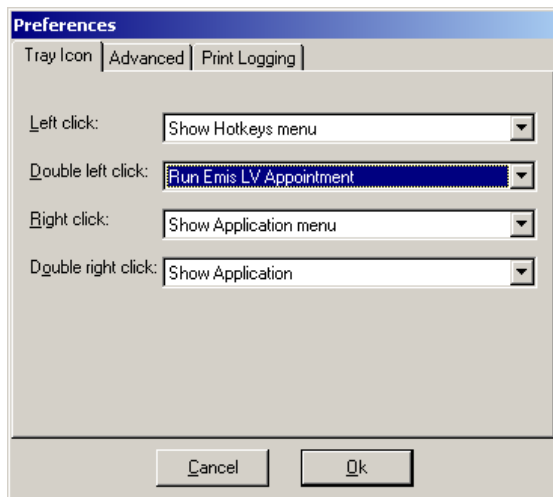


2. The designation of “fixed” lines above refers to the standard designs provided. The “fixed” fields can be used for any purpose in custom designs. Note that the entries may be centred on the card or label by simply prefixing the data with leading spaces.



Now set the Hotkey which will initiate printing of appointment cards. To do this, click on the “Hotkey” tab to bring it to the front, as shown above. First, set the “modifier” key as any required combination of Control/Alt/Shift by ticking the relevant tick boxes. Now set the required key by clicking into the “Hotkey” line then tapping the required key, e.g. “L” as in the example above. This example shows “Alt L” has been set as the hotkey combination. Be sure to choose a hotkey combination which is NOT already in use for any other application on the workstation.

Finally OK out of the interface.



Finally, it is possible to associate the “emis LV appointment” script with a left double click action on the FlexaTrace icon which runs in the system tray. On the FlexaTrace window, select File > Preferences > Tray Icon. Use the drop down menu for “Double left click” to select the required script, designated in this example as “Run Emis LV appointment”. OK out to save this selection.

Templates Available

- appointment1 – EPL, label with one header line, no patient name and 2 message lines
- appointment2 – EPL, label with one header line, no patient name and 2 message lines, including premises name.
- appointment3(card) – EPL, card with 3 header lines, no patient name, and 2 message lines.
- appointment4(card) – EPL, card with 3 header lines, no patient name, 2 message lines, including premises name

appointment5 – EPL, label with one header line, patient name and 2 message lines
appointment6(card) – EPL, card with 3 header lines, patient name, and 2 message lines.
appointment7 – EPL, label with one header line, patient name and 2 message lines, including premises name.
appointment8(card) – EPL, card with 3 header lines, patient name, 1 message line, including premises name

Brotherappt1 – Brother, label with one header line, no patient name and 2 message lines
Brotherappt2 – Brother, label with one header line, no patient name, including premises name.
Brotherappt3(Card) – Brother, card with 3 header lines, no patient name, and 2 message lines.
Brotherappt4(Card) – Brother, card with 3 header lines, no patient name, 2 message lines, including premises name
Brotherappt5 – Brother, label with one header line, patient name and 2 message lines
Brotherappt6(Card) – Brother, card with 3 header lines, patient name, and 2 message lines.
Brotherappt7 – Brother, label with one header line, patient name, including premises name.
Brotherappt8(Card) – Brother, card with 3 header lines, patient name, 1 message lines, including premises name
Brotherappt9(Card) – Brother, card with 3 header lines, patient name, 1 message lines, including premises name where header lines 2 and 3 use premises fields automatically from the Premises Options, as described below.

emis_LV_appointment - the EPL default, a reminder to select the required template.

Call our office to enquire regarding alternative or custom templates which may include e.g. NHS Number.

Configure LV to use the Shift F6 Option to Print Cards

Note that you need to install the FlexaTrace client BEFORE configuring LV for Appointments.

Configure EMIS LV appointments setup as per the following screenshots

The Surgery

| | |
|--|-------------------------------|
| RP Register A Patient | ST Search & Statistics |
| RD Registration Details | DS Dispensing |
| RS Registration Status | WP Word Processing |
| PR Prescribing | GP GP-Links |
| MR Medical Record | ID Clinical EDI |
| CM Consultation Mode | MS Screen messages |
| AP Appointments | CU Change Current User |
| PN Practice notes | CD Close Down |
| SP Summary Printout | CO Communications menu |
| CC Community Care | QP Query processor |
| PI Patient Information Leaflets | AO Advanced options |
| RF Patient Referrals | RI Medication Requests |

Palm GP

Select option █ 18:14 Term 515Job 21 (DS) V5.2

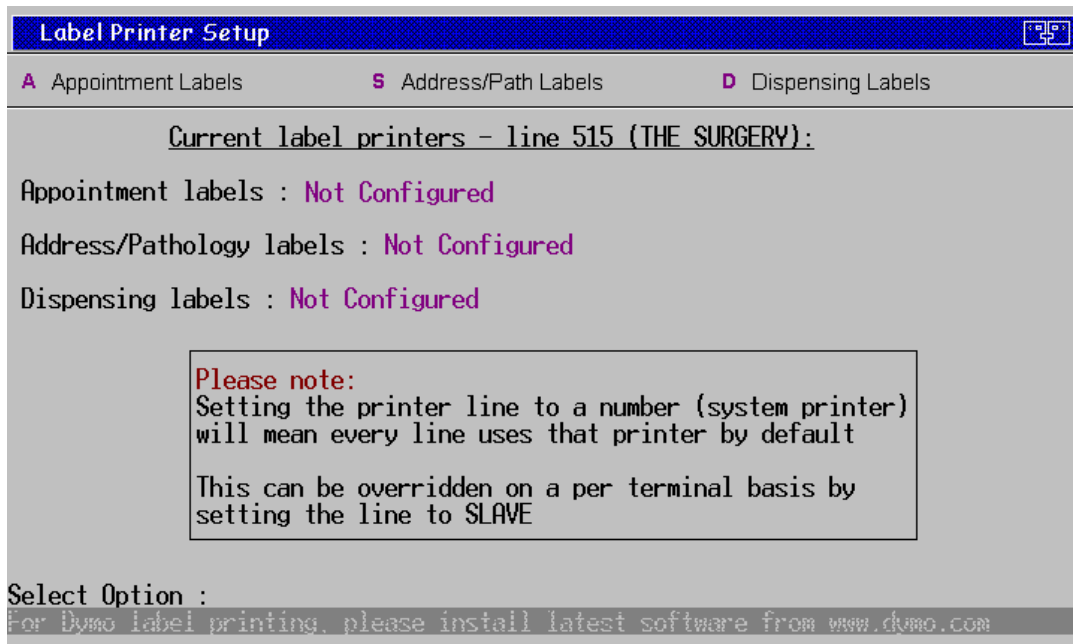
From the Main Menu select “AO” – Advanced Options

Advanced Options

| | |
|----------------------------------|--------------------------------------|
| AU Patient audit trail | DT Dictionaries and Templates |
| PO Stored Printouts | CS Changes to the System |
| ME Mentor | AM Appointment Maintenance |
| BS Brief Summary | Clinical EDI Manager |
| BD Batch Processing | EU EMIS updates |
| RT Record transfer | LS Label Setup |
| EM E-Mail | |
| PD Practice Diary | |
| Produce FHSA download of age/sex | |
| QP Query processor | |
| PA Practice accounts | |
| AN Apollo Scan | |

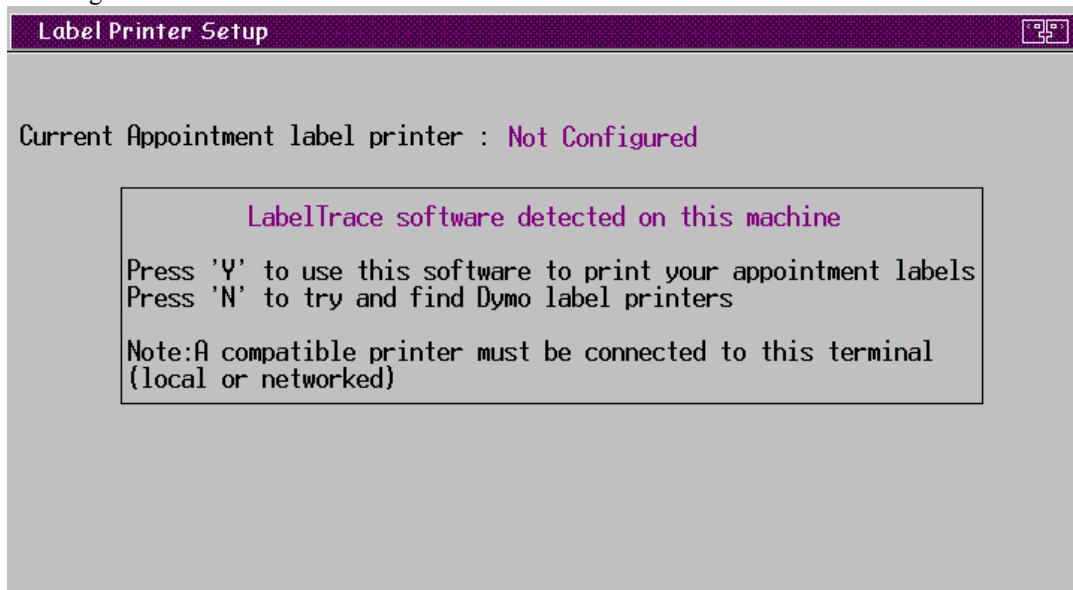
Select option █ 18:14 Term 515Job 21 (DS) V5.2

On the Advanced options menu, select “LS” – Label Setup

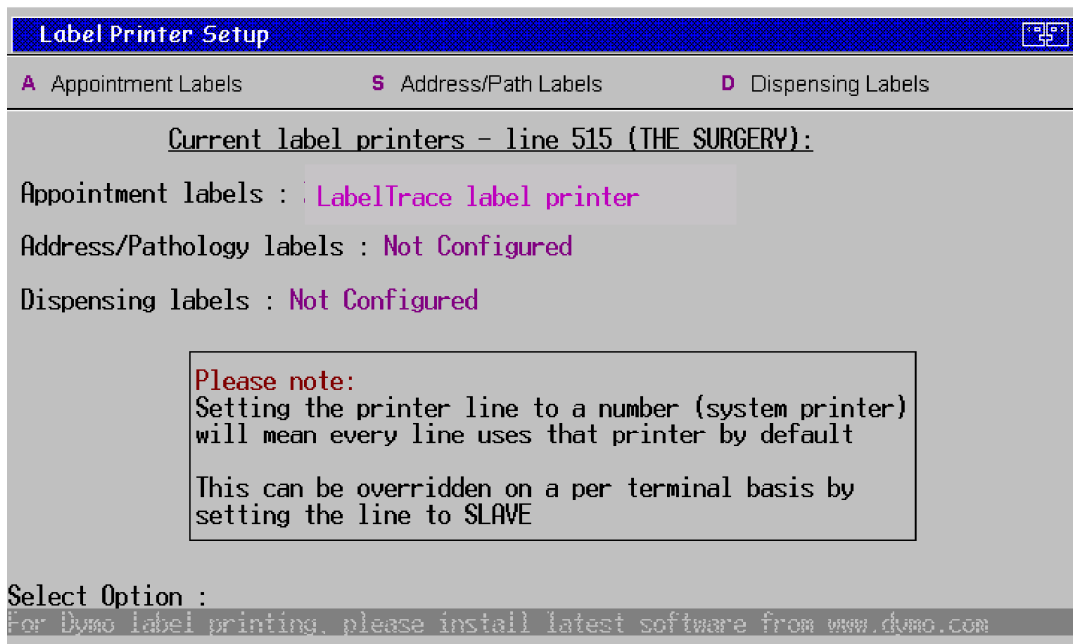


on the Label Printer Setup menu, select “A” – Appointment Labels

LV should now detect that the Appointment card system has been installed and offer the opportunity of selecting it.



Select “Y” to confirm you wish use the LabelTrace® appointment system.



The screen will now confirm that the Appointment labels will be printed on the “LabelTrace label printer”. This does refer to the printer specified in the FlexaTrace configuration above!

Configuration in LV is complete. This is not “global” and must be set on each workstation.

6. Premises Options

Originally the premises information etc used on cards was entered through the interface in fields “Fixed1” etc. As of V0.24, premises info for multi-site practices can be selected automatically based on the Session Name (the name of the session in the LV interface). This is generally utilised in any case to allow users to visually identify where the session is located. This automatic mechanism will operate if any of the following fields are used in the selected template (note that different templates MAY be required, not those currently installed).

```
Premisesname  
premisesaddress1  
premisesaddress2  
premisesaddress3  
premisesaddress4  
premisesaddress5  
premisestelno.
```

The required “premises.txt” file must exist in the path
FTData\scripts\data\emis_LV_appointment\premises.txt
And this is used to set each of the template variables.

The format of `premises.txt` is one premises per line with comma separated fields.

The order of the fields in the file is:

```
abcdef, premisesname, premisesaddress1, premisesaddress2,  
premisesaddress3, premisesaddress4, premisesaddress5, premisestelno
```

where “abcdef” is a string of characters to be searched for in the name of the session in the LV interface).

Note

- Blank lines and any line starting with # are ignored.
- White space is removed around each field so a space after each comma is ok.
- The matching string is case insensitive.
- The number of fields in a line MUST be 7 or 8. If 8, the first is assumed to be a matching string. Thus you must ensure the data has 6 or 7 commas.
- The premises entry for the default (generally main) surgery need have no matching string set.
- The first match found sets the premises variables for the template.
- If there are no matches then the first premises line is used.
- If there are multiple matches, the first matching entry is used. Hence the matching string should be unique to a site’s “Session Name” entry in LV.

For example – if the “premises.txt” file had the following data..

```
Clermiston Surgery, 23 Clermiston Road, Edinburgh .....  
X3, Branch Surgery, 12 High Street, Edinburgh .....
```

Then any sessions having “X3” or “x3” ANYWHERE in the session name will automatically use the “Branch Surgery” data set. All other sessions will use the default “Clermiston Surgery” data set.

Printing Appointment Cards

Printing of Appointment cards can be initiated in several ways ...

1. Use the Shift F6 option while in the appointment book. This option prints appointment card(s) for the patient in the currently selected slot.
- 2a. Use the hot key combination specified in FlexaTrace
- 2b. Left click on the FlexaTrace icon in the System Tray then left click on the “Emis LV Appointment” menu option
- 2c. Double click on the FlexaTrace icon in the System Tray (assuming this has been selected to be associated in the FlexaTrace Preferences).

Each of the method 2 options prints appointment cards for the “current patient”.

Using the F6 Option

To print an appointment card, highlight a slot with a patient name inserted and use “SHIFT F6” to initiate card printing. LV will now present a box asking for confirmation that a card should be printed. Press the “Enter” to confirm and a card will be printed.

The screenshot shows a window titled "Morning Surgery, Dr Stanley Fraser, Monday 12.2.2007". Below the title bar is a legend of function keys: M (Make appointment), L (Patient left), N (Next patient please), C (Cancel), E (Edit times), H (Swap holder), A (Arrived), R (Review detail), U (Unregistered), S (Send in), P (Print List), B (Block), T (Text), and D (Embargo). The main area displays a list of appointment slots with columns for Time, Name, and No./Type. The first slot at 09:00 for Mrs Grace Smith is selected. A dialog box titled "Print card? :" is overlaid on the list, with "Yes" selected in a dropdown menu. At the bottom of the window, a status bar shows navigation instructions: "-- move, TAB - mark, Shift TAB - mark all, Shift F6 - Pat. slip".

Note

- normally only a card for the currently selected slot will be printed. If however, the appointment template references any of the additional demographics which can be obtained via the EMIS API, then any other appointments in the future (span in days specified in the Flexatrace configuration) will be retrieved and presented for possible printing. This will also be the case if the “all_appointments” parameter has been configured to “Y”.
- Launching the appointment card system from F6 returns data for the patient in the current selected appointment slot. The patient in the selected slot does NOT need to be the “current patient”.

Using the Hot Key option

In FlexaTrace Configuration above, a particular hot key combination was specified. Entering this hot key combination on the keyboard will initiate printing of one or more appointment cards. These will concern the “current patient”. This can be initiated from any part on the LV system, so long as a “current patient” is selected.

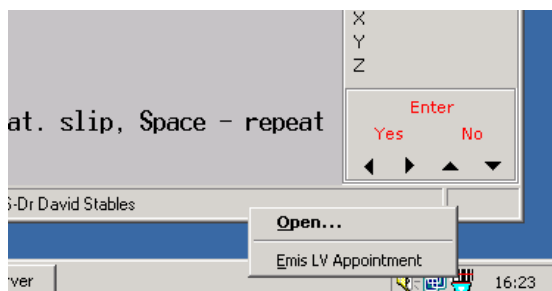
Using the Mouse to Initiate printing

This can be achieved by double clicking the FlexaTrace icon, (assuming this has been selected to be associated in the FlexaTrace Preferences).

FlexaTrace in the System Tray



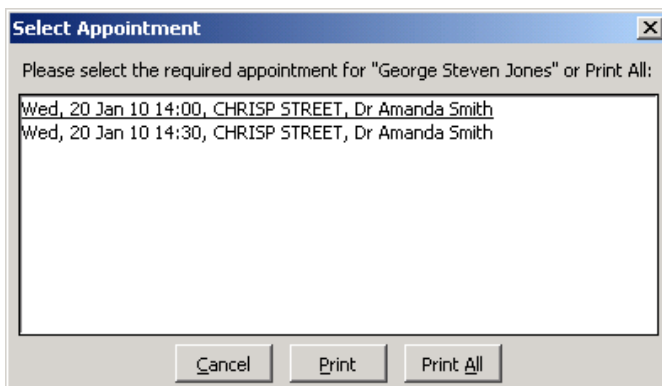
Alternatively left click the FlexaTrace icon in the system tray then click the “Emis LV Appointment” menu option .



This will initiate printing of one or more appointment cards. These will concern the “current patient”. This can be initiated from any part on the LV system, so long as a “current patient” is selected.

Printing Multiple Appointment Cards

Depending on the configuration and template chosen, multiple cards can be printed for a patient. If multiple appointments exist for the patient and they are retrieved then a selection window is presented



To print a card for all appointments, click the “Print All” button.

To print a card for a specific appointment, click the appointment line to select it and then click the “Print” button. Alternatively, double click the appointment line.

To cancel out from printing, click the “Cancel” button.