Installing EMIS PCS Appointments with R2 of FlexaTrace (Version using API V3)

NOTE – requires FT_RT2.108 or later (Client Release V99)

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1. Introduction

This version of the appointment card add-on for EMIS PCS uses the EMIS API to retrieve appointment data.. It prints data for the "current patient". Appointments up to 400 days into the future may be obtained and these are obtained only for the "current patient", allowing faster response.

2. Preliminaries

Install the label printer to be used with the EMIS PCS 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) **and plain EPL templates**, 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.

Note that "Metaprinter" templates do not require a downloaded font. Metaprinter templates use a generalised label description language and will utilise Truetype fonts printed as graphics on e.g. Zebra printers.

Important Note – if a dummy printer "emis pcs appointment" was installed by a previous version of the appointment card software, delete it and ensure that the default printer is as normally required by the practice. Also untick any entries for users concerning automatic printing of appointment confirmations in the PCS option…Appointment Configuration > Holder Configuration.
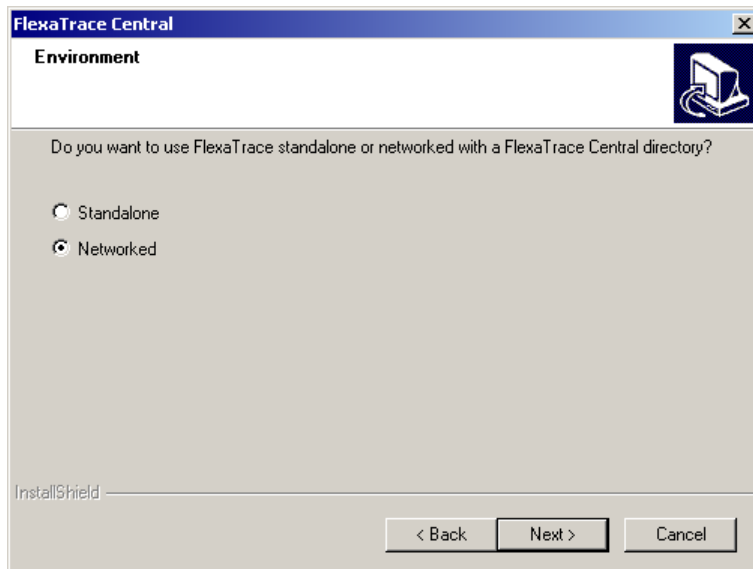
3. Install FlexaTrace Central

On the server, or first workstation if the server is not directly accessible, Install FlexaTrace Central by running setup.exe from the install folder. (the installer will verify that the install files are not corrupted before it starts running).
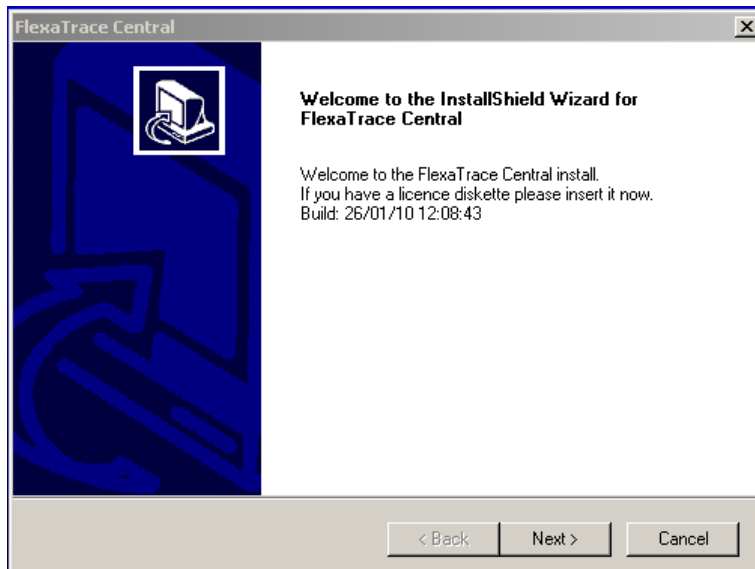
Click Next on the Welcome screen to continue installation.
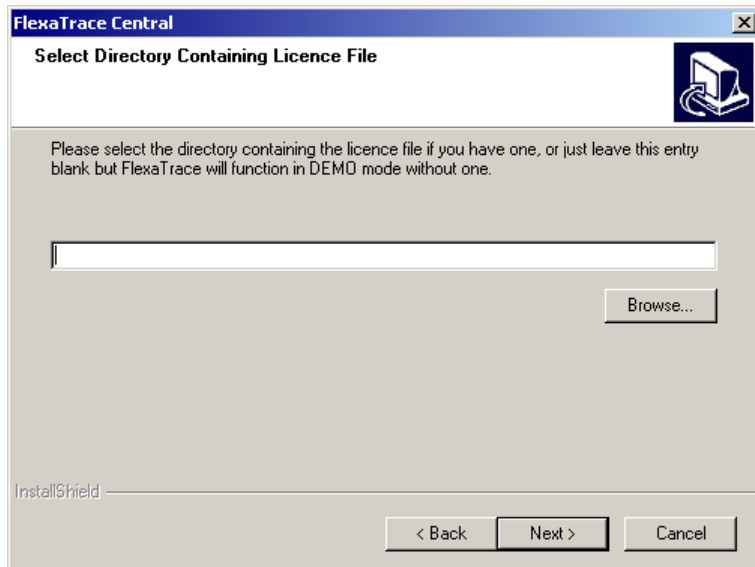
If a licence has been provided as a file "flexatrace.lic", specify where it is located. If the licence is in the same folder as the setup.exe program for the FT Central installer it will be automatically detected and reported. If the licence will be applied later via the client, because it is in ASCII form (flexatrace.ascii.txt) or the "flexatrace.lic" file will be copied manually into the FTDATA folder, leave blank. In either case, click Next to continue installation.
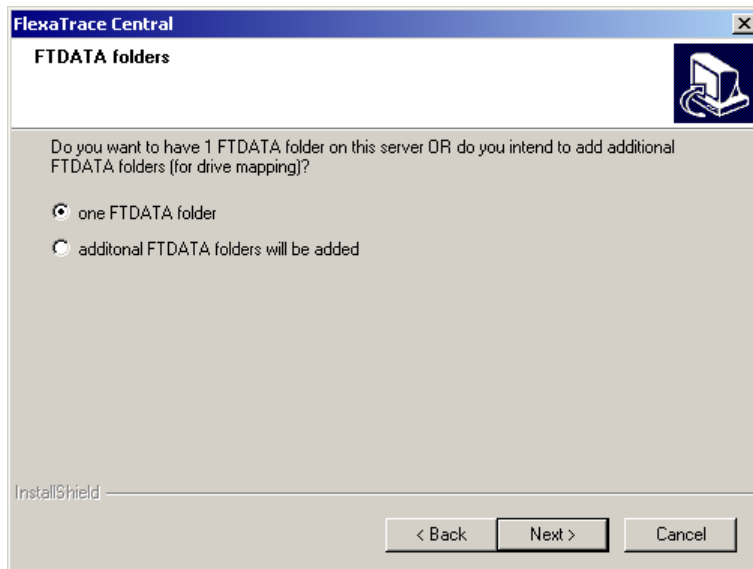
Select "Standalone" if you wish to install all the components of FlexaTrace on one PC. Select "Networked" if the central components will be shared by multiple PCs.
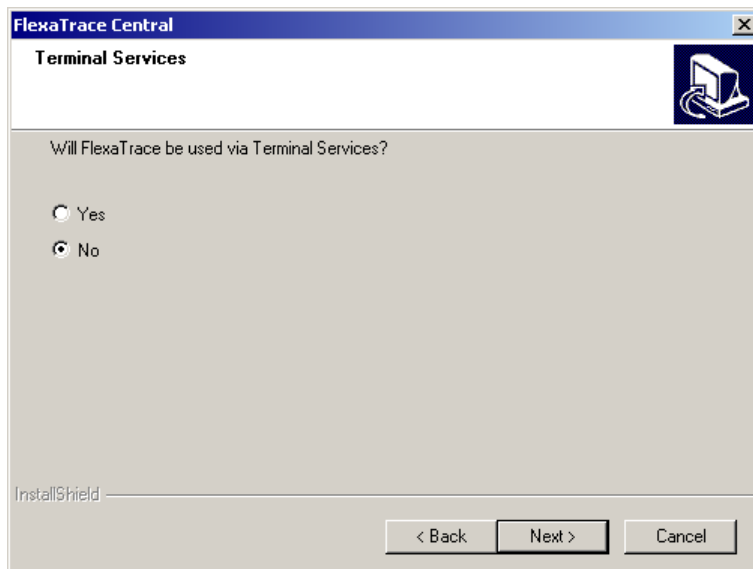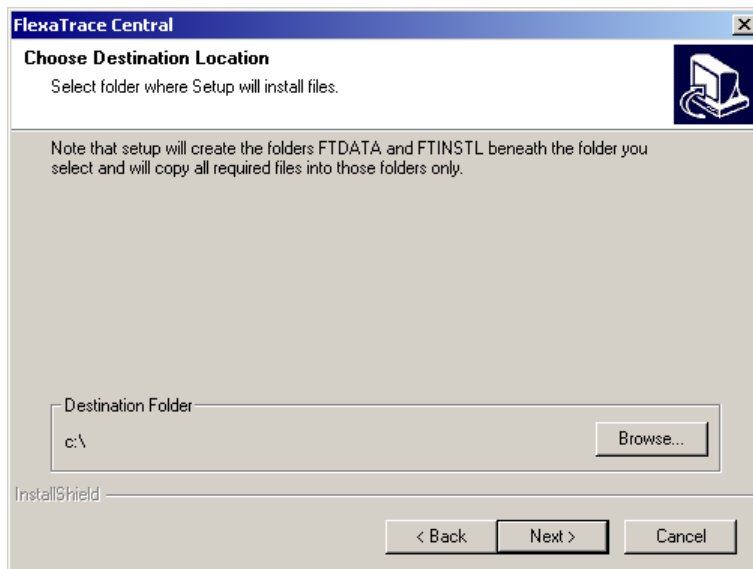

Specify whether FlexaTrace will be used via Terminal Services (or Citrix). It is generally recommended NOT to do so. If Yes is selected, the INI file specifying local preferences will be stored in the Windows folder of workstations. In the case of a Terminal Server client installation, the INI file will 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 may multiple INI files, one for each workstation which they have logged on to.
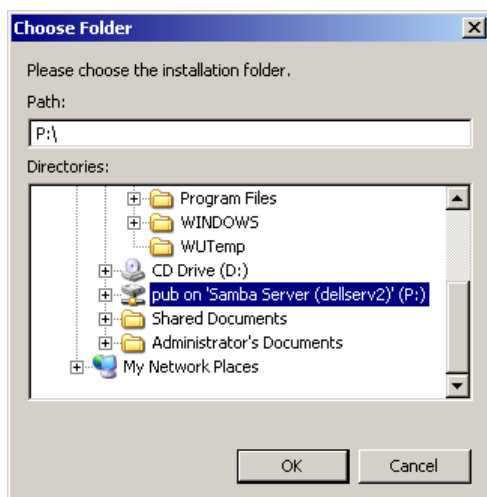
NB: It is possible to install for Terminal Services but select No to this question. However, it then is a requirement to ensure that the permissions on the client Flexatrace folder are such as to allow files to be created/edited for all users.

FlexaTrace Central

FTDATA folders

Do you want to have 1 FTDATA folder on this server OR do you intend to add additional FTDATA folders (for drive mapping)?

○ one FTDATA folder

○ additonal FTDATA folders will be added

InstallShield

< Back   Next >   Cancel

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

FlexaTrace Central

Choose Destination Location
Select folder where Setup will install files.

Note that setup will create the folders FTDATA and FTINSTL beneath the folder you select and will copy all required files into those folders only.

Destination Folder

c:\   Browse...

InstallShield

< Back   Next >   Cancel

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.

Choose Folder

Please choose the installation folder.

Path:

P:\

Directories:

- Program Files
- WINDOWS
- WUTemp
- CD Drive (D:)
- pub on 'Samba Server (dellserv2)' (P:)
- Shared Documents
- Administrator's Documents
- My Network Places

OK   Cancel

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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.
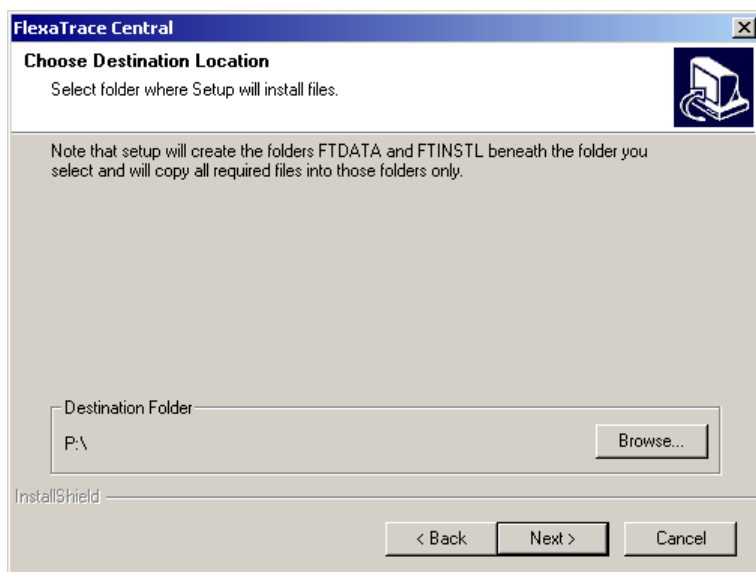

The required path is now displayed. If this is correct, click Next to continue.
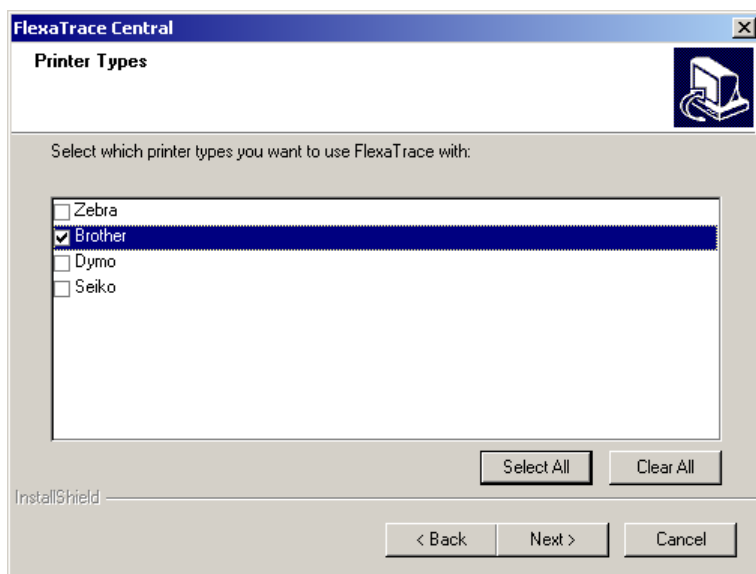

Now specify whether additional printer support is to be installed. Note that for Zebra EPL or ZPL (or other ASCII based printers) no additional support is required if simple ASCII templates are to be used. The exception is if MetaPrinter templates are to be used to support e.g. TrueType fonts on the 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.
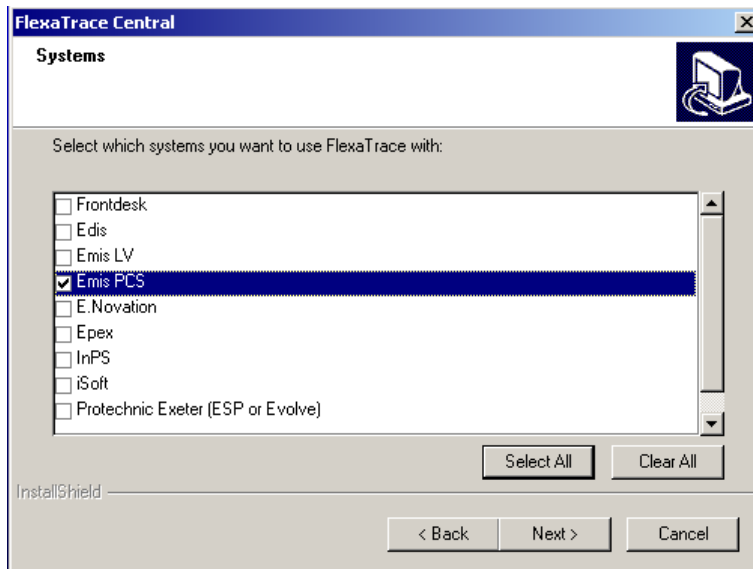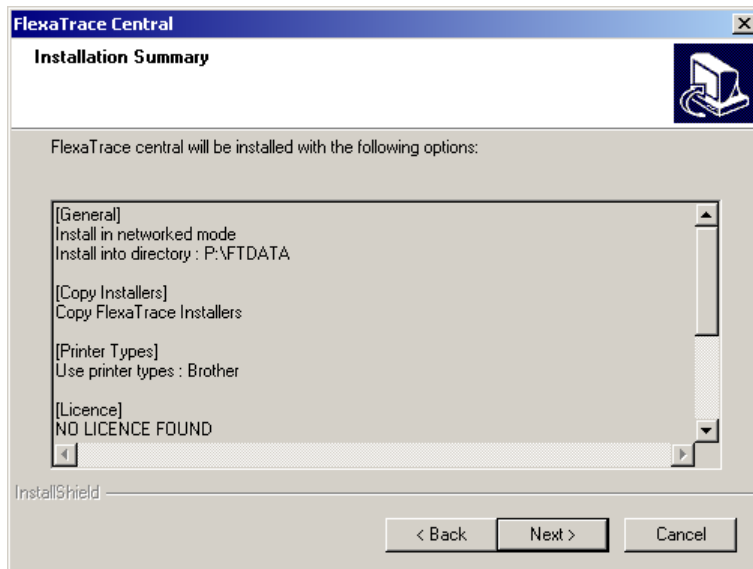
Now select Emis PCS as the clinical system for which FlexaTrace scripts are to be installed. Click Next to continue.
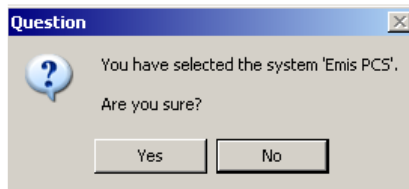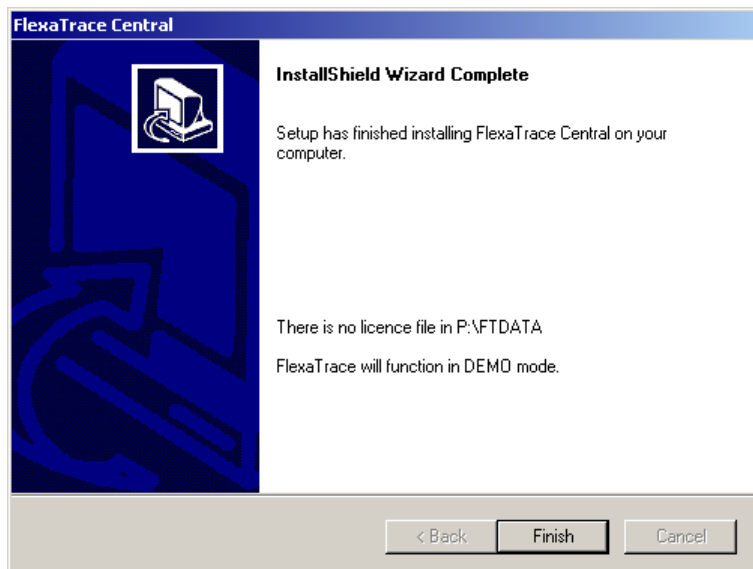

Click Yes to confirm your selection or No to go back and change it.
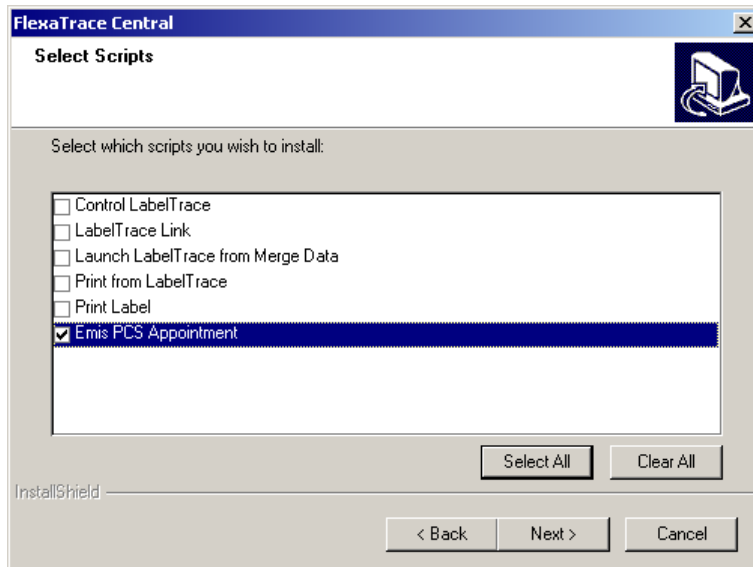
Select the "Emis PCS Appointment" option to be installed and click Next to continue.

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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 Ftinstl folder
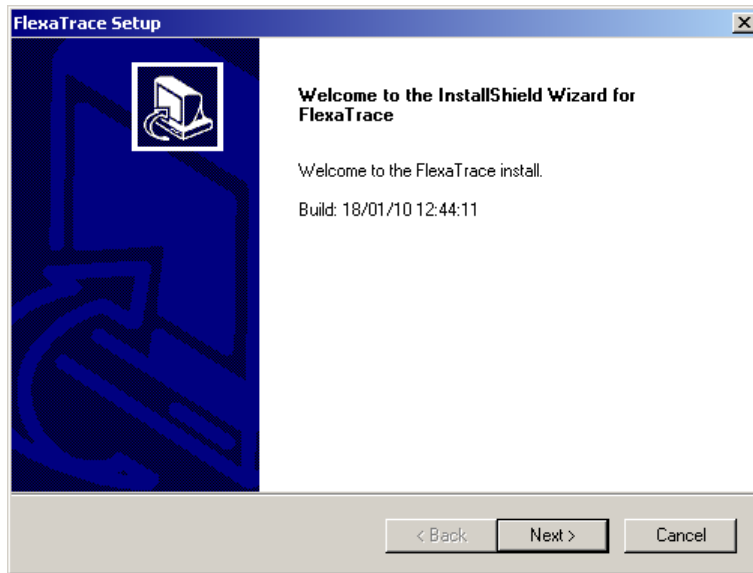or run setup exe located in the folder
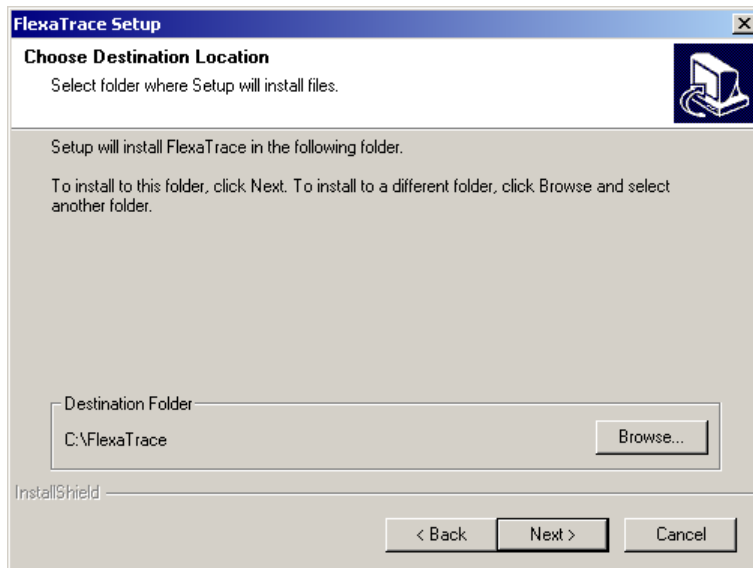\\servername\Ftinstl\ft_client_installer\Vxx
or
\\servername\shared\Ftinstl\ft_client_installer\Vxx
as appropriate
(where Vxx folder name indicates the version of the installer)
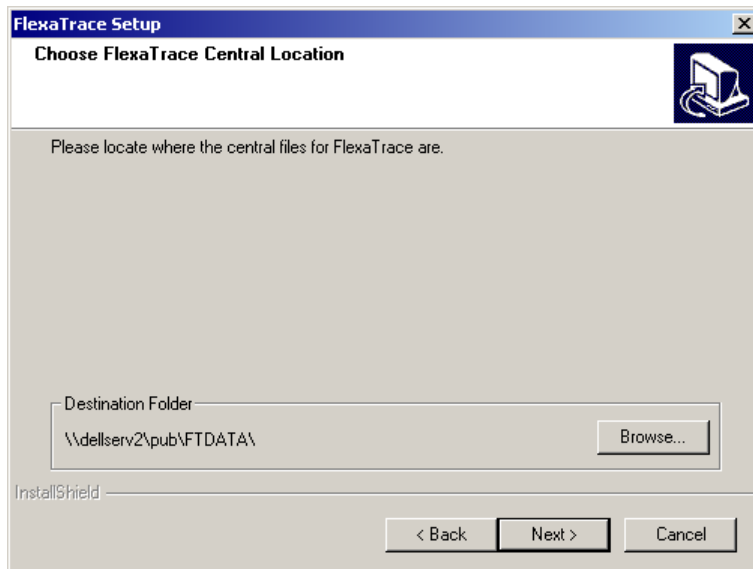

click on Next on the welcome screen to continue.

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.
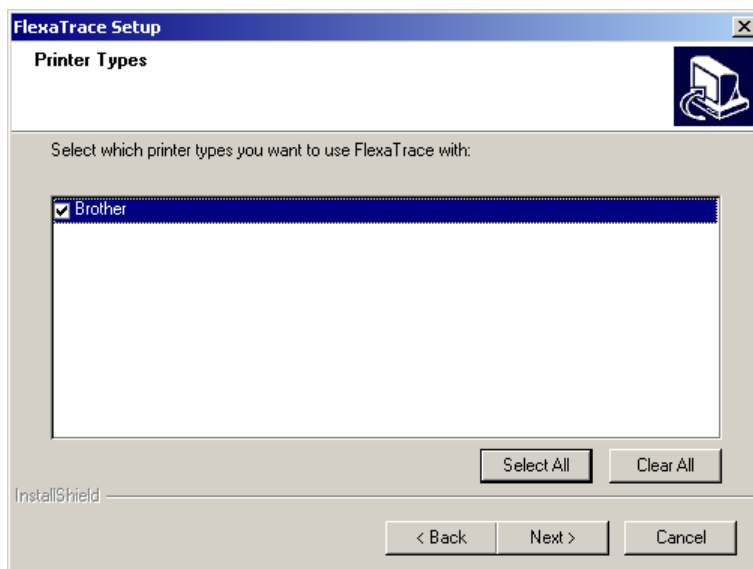

Now select the printers for which support is to be installed. Note that the list of available types consists only of those selected during the FlexaTrace Central installation. Click Next to continue.
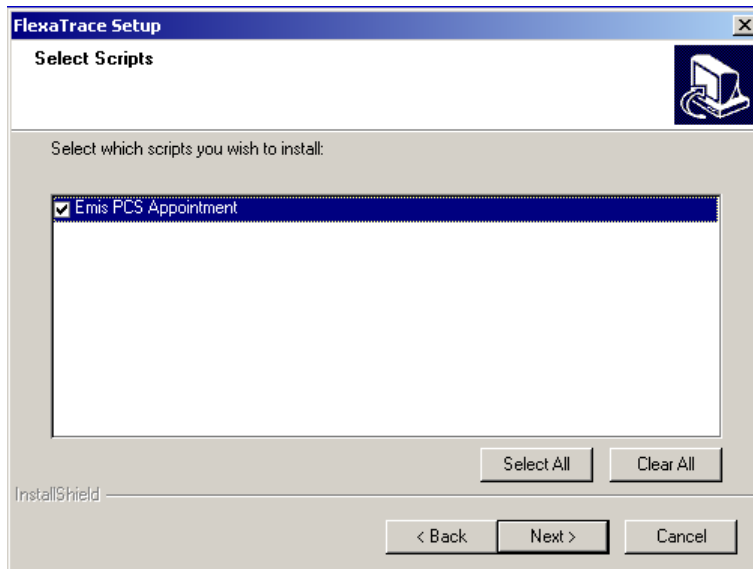
Select which scripts to install for this client installation. Note that the list of available scripts consists only of those selected during the FlexaTrace Central installation. Click Next to continue.
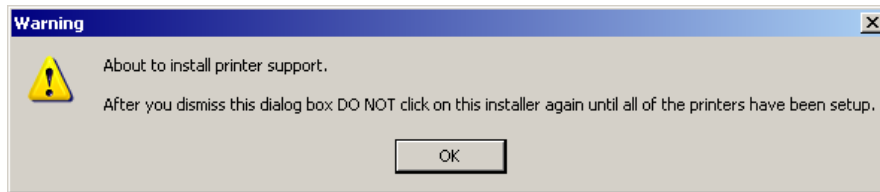
If any printer support has been selected then the above prompt will be displayed prior to installing printer support and at several points during the printer support installation process. Be sure to avoid clicking on the main FT installer until the printer support installer(s) have finished running. Click OK to start the printer support installer(s) running. The example below shows the "b-PAC" installer running – this supports Brother printers.
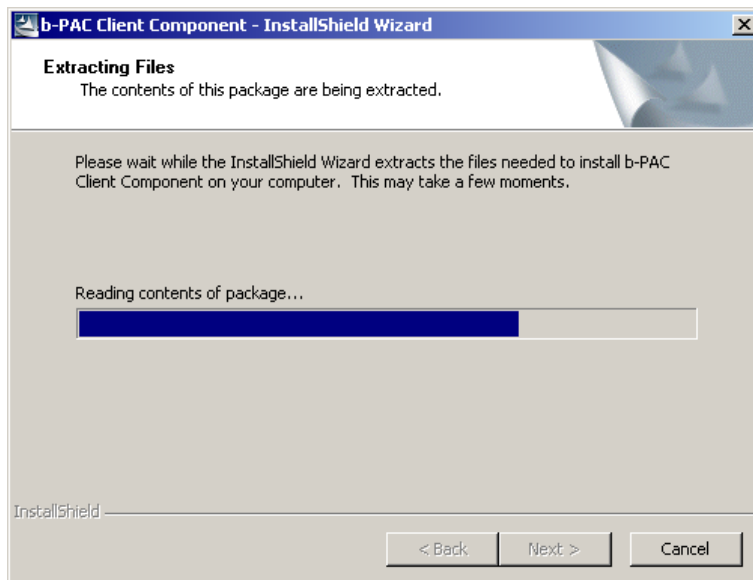
The support installers will start to run.

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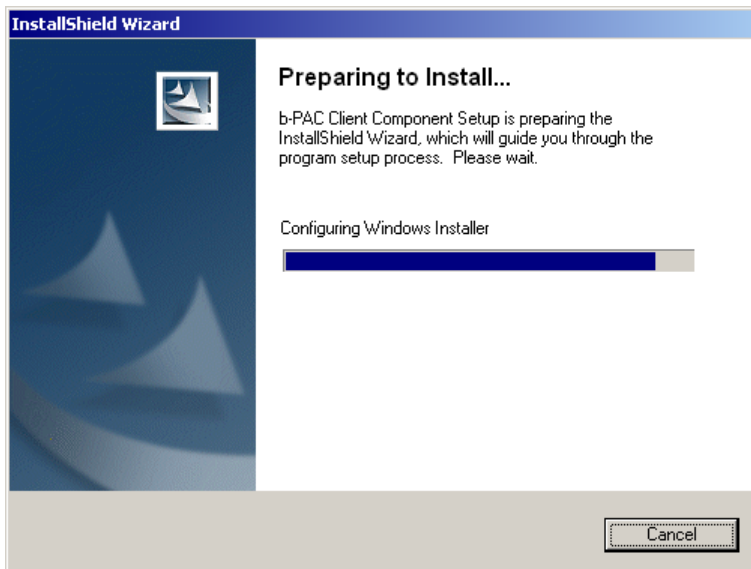
The installers present a number of screens, some of which may need to be acknowledged.
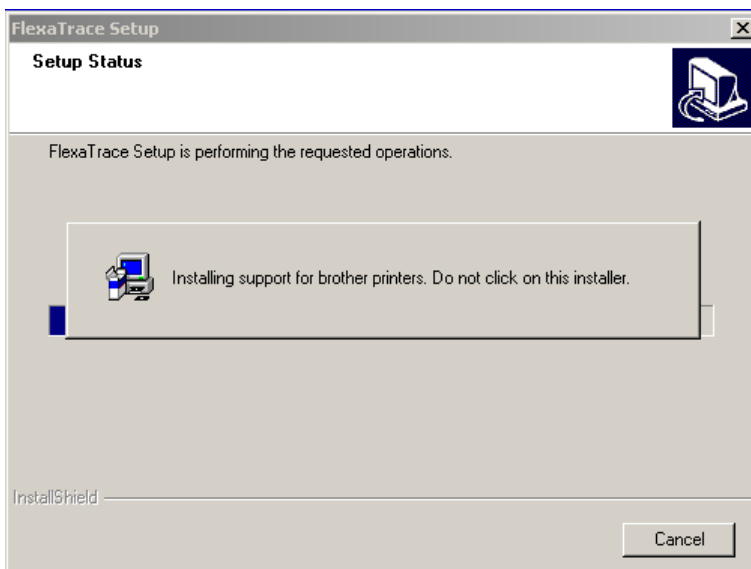
Note any message to avoid clicking on the main FlexaTrace installer.
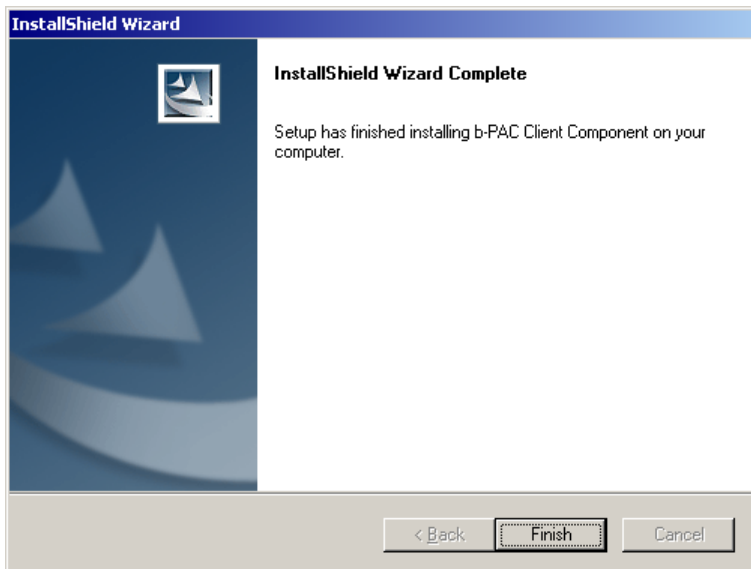
when each printer support installer has finished running click "Finish" etc as appropriate. The main FlexaTrace installer will then continue.
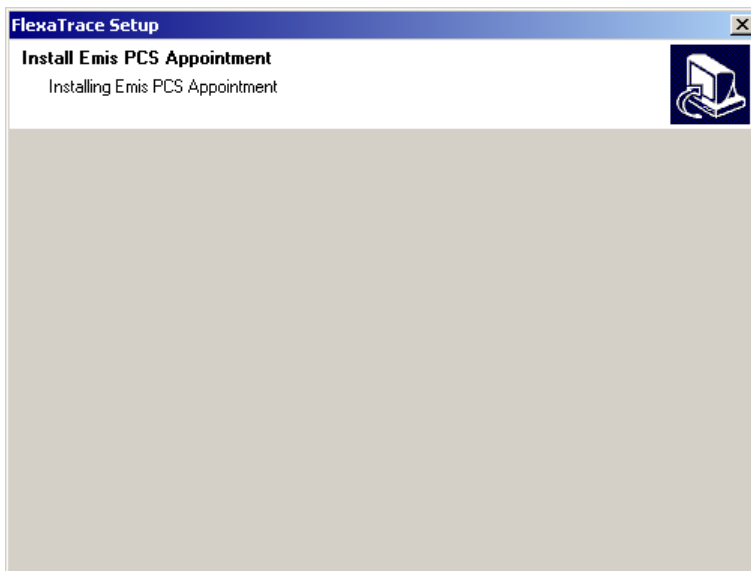
The installer will now confirm installation of the script with the message above then continue.

FlexaTrace Setup

InstallShield Wizard Complete

Setup has finished installing FlexaTrace on your computer.

☑ Run FlexaTrace after this window closes.

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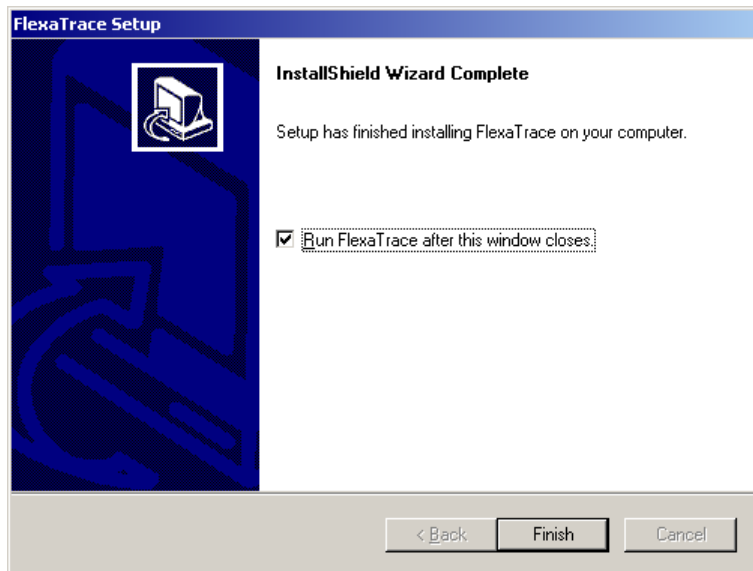
The final installation screen has a tick box to cause FlexaTrace to run on completion of the installation. Tick this box as appropriate and then click Finish to complete the client installation.

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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 left or right clicking on the icon and selecting "Open".

FlexaTrace in the System Tray

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_pcs_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.

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

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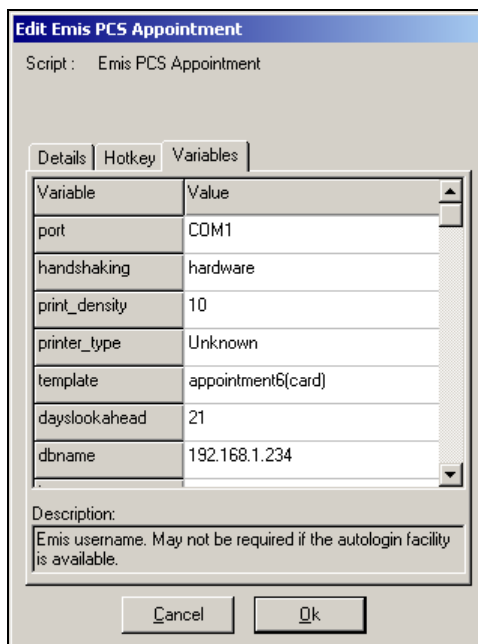
"Port": set the appropriate port as required.

NB if a printer is selected which requires port to be "Printer", the Port setting is hidden.

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.

Printer_IP: if port set as IP enter the IP address and IP port as e.g. "192.168.1.30:9100"

printer-type: select to match the target label printer (Note standard EPL printers are 203 dpi)

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.

"dayslookaheadx": specify how many days worth of future data to retrieve. (1-400)

"dbname": set to EMIS SQLServer database name, normally "EMISnnnn" ("nnnn" is the EMIS Site ID)
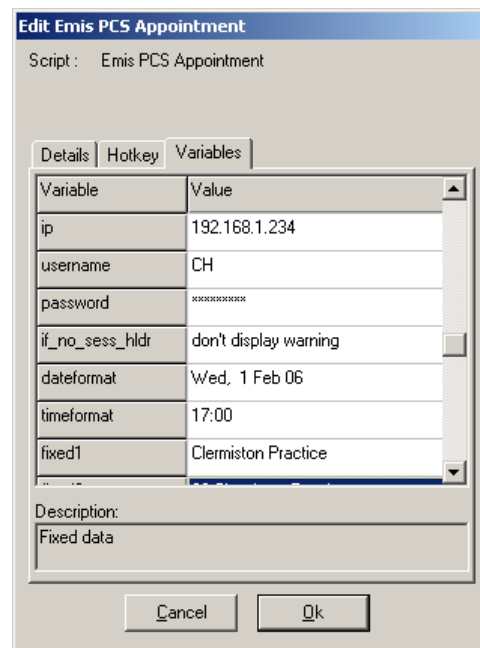
"ip": the server IP address, found on the PCS window.

"username": enter a valid PCS username.

"password": enter the corresponding current password.

"if_no_sess_hldr": display/do not display a warning if no session holder exists for selected session.
[See "Clinician List" below for more detailed info on operation of this feature]

"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

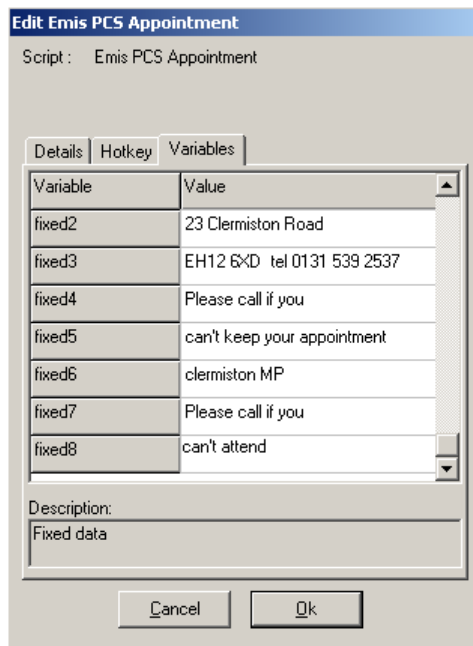"Fixed2": second line of header on cards
"Fixed3": third line of header on cards
"Fixed4": first line of footer on cards
"Fixed5": second line of footer on cards.
"Fixed6": first line of header on labels
"Fixed7": first line of footer on labels
"Fixed8": second line of footer on labels
"Debug": engineer use only for problem resolution

Note that the designation of "fixed" lines 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.

NB from Emis Appointment script V0.53 onwards, there is an additional parameter "choose_appts". Set to No to bypass the Select appointments prompt, where there is more than one future appointment.

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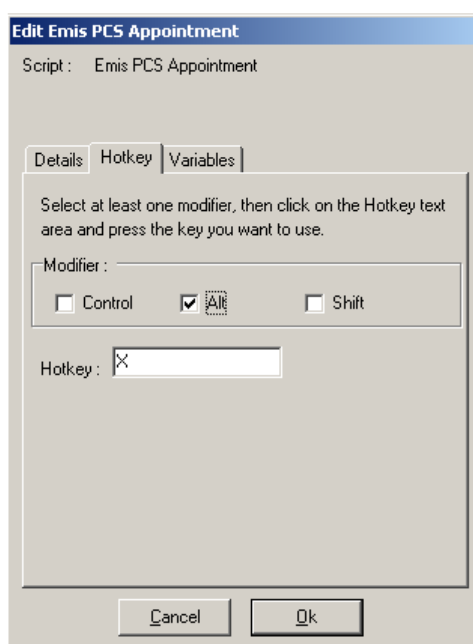
Now set the Hotkey which will initiate printing of appointment cards. To do this, click on the "Hotkey" tab to bring it to the front, as shown above. First, set the "modifier" key as any required combination of Control/Alt/Shift by ticking the relevant tick boxes. Now set the required key by clicking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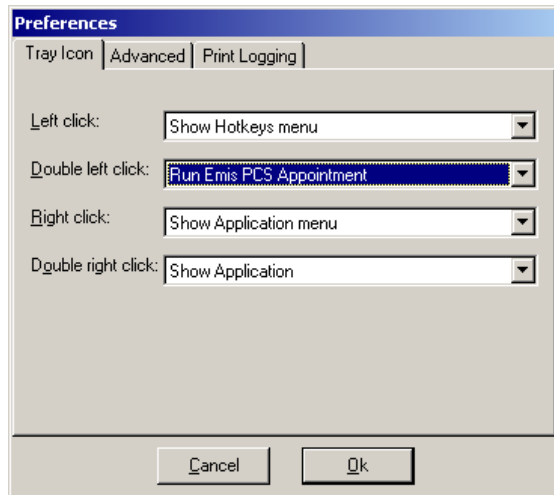tkey" line then tapping the required key, e.g. "X" as in the example above. This example shows "Alt X" has been set as the hotkey combination. Be sure to choose a hotkey combination which is NOT already in use for any other application on the workstation.

Finally OK out of the interface.

Finally, it is possible to associate the "emis PCS 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 PCS 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

Meta EPL label.txt – Metaprinter label with one header line, patient name and 2 message lines,

All the following are cards with three header lines, patient name plus …
Meta EPL (card) – 1 appt , 2 message lines
Meta EPL (card) - as above with logo
Meta EPL (card) 3 appt inc message - up to 3 appts, 2 message lines
Meta EPL (card) with logo 3 appt inc message - as above with logo
Meta EPL (card) 3 appt inc site and message- up to 3 appts with premises name, 2 message lines
Meta EPL (card) with logo 3 appt inc site and message – as above with logo
Meta EPL (card) 4 appt- up to 4 appts
Meta EPL (card) with logo 4 appt - as above with logo
Meta EPL (card) 4 appt inc site- up to 4 appts with premises name
Meta EPL (card) with logo 4 appt inc site - as above with logo
Meta EPL (card) 6 appt- up to 6 appts
Meta EPL (card) with logo 6 appt - as above with logo

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Meta EPL label.txt – Metaprinter label with one header line, patient name and 2 message lines,
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_pcs_appointment - the EPL default, a reminder to select the required template.
print_siteid.txt – text only template used to determine internal Site IDs for a multi-site practice

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

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 PCS interface). This is generally utilised in any case to allow users to visually identify where the session is located. As of V0.42, premises info for multi-site practices can be selected automatically based on the internal Site ID. 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_pcs_appointment\premises.txt`
And this is used to set each of the template variables.

The format of `premises.txt` is one premises entry 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 PCS interface OR is the relevant internal Site ID in the form "SITEID=nnn". (See below for how to determine the Site IDs).

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, whether or not there is a matching entry in the first line
- If there are multiple matches, the first matching entry is used. Hence, if not using Site ID, the matching string should be unique to a site's "Session Name" entry in PCS.

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.

Determining Site ID

The quickest way to determine the Site IDs in a multi-site practice is to select a special appointment template "print_siteid.txt" and print this for an appointment from each site in turn.

To do so…
- configure a workstation to print to Port = File, specify where the files should be saved and select the "print_siteid.txt" template
- select an appointment for the first site and print.
- examine the data in the file, which will confirm the site ID along with the Patient name and Appointment date and type in the name of the associated premises so this is recorded.

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- repeat for each further site
- working from this information, set up the "premises.txt" file accordingly
- repeat printing for all sites
- examine the data in each file, which will confirm the site ID along with the Patient name, Appointment date and also now Premises Name from the premises.txt file
- confirm that this is now correct or amend and repeat as necessary.
- finally remember to re-configure for the correct port and template.


7. Clinician List Option

It is possible to create sessions in the PCS Appointment Book for which no session holder is specified. When printing appointment cards, the session holder name is normally included as the clinician. If there is no specified session holder, it is still possible, dependent on circumstances, to add a clinician's name at the point of printing the appointment card. These names are stored in a file called "doctors.txt" in the location

Path_to_server\ftdata\scripts\data\emis_pcs_appointment\doctors.txt

The doctors.txt file is simply a list with one name per line, e.g.

 # this is a comment line
Dr Smith
Dr Jones
Nurse Green

Note that lines beginning with # are ignored.
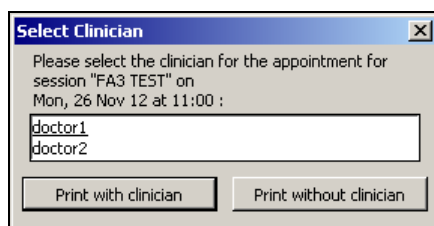
 Select clinician window

It is important to understand when a name may be added.

no doctors.txt file or no entries in it
AND if the "if_no_sess_hldr" parameter is set to "don't display warning" > all cards just printed

no doctors.txt file or no entries in it
AND if the "if_no_sess_hldr" parameter is set to "display warning" > all cards printed but warning prompt as required

doctors.txt file exists and has entries in it
AND if the "if_no_sess_hldr" parameter is set to "don't display warning" > all cards printed but prompted for clinician name

doctors.txt file exists and has entries in it
AND if the "if_no_sess_hldr" parameter is set to "display warning" > all cards printed but warning prompt as required and prompted for clinician name

To avoid being prompted for a clinician name, ensure the doctors.txt file has no valid entries. Note that even when prompted for clinician name, there are buttons for "print with clinician" and "print without clinician", so a name does not need to be selected.

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8. Printing an Appointment Card

It is essential that the "Current Patient" is the relevant patient. If an appointment slot has just been allocated, then this will be the case. If this is not the case double click the patient name in the slot to set this patient as the "current patient".

Now you may print an appointment card by either
a.   entering the hotkey combination you set above, e.g. "Alt X" or
b.   using a double left click on the FlexaTrace icon in the system tray (if appropriately configured)
c.   left clicking on the FlexaTrace icon then left clicking the "emis_pcs_appointment" option as per the screenshot below/
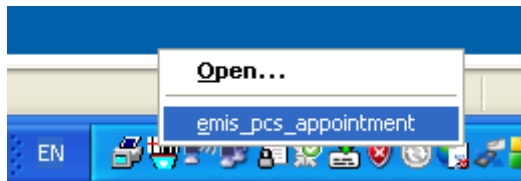
Printing Multiple Appointment Cards

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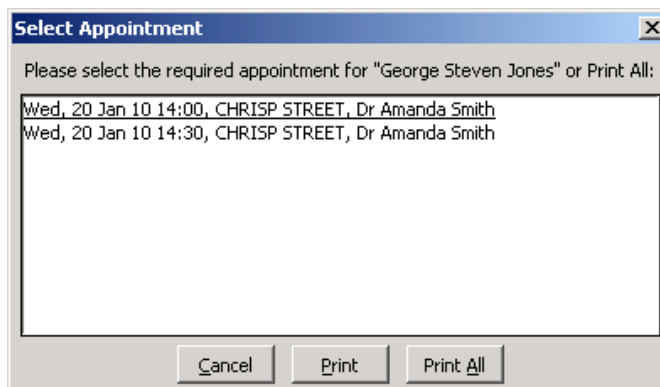
To print a card for all appointments, click the "Print All" button.

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.

NB from Emis appointment script V0.53 onwards, there is an additional parameter "choose_appts". Set to No to bypass the Select Appointment prompt. All future appointments will be printed automatically.

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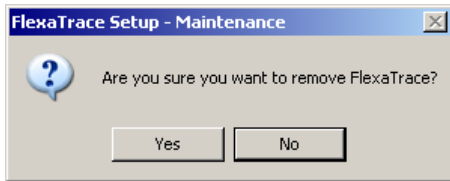## 9. De-installing the FlexaTrace Client

Click on the Start > Control Panel > Add or Remove Programs option.
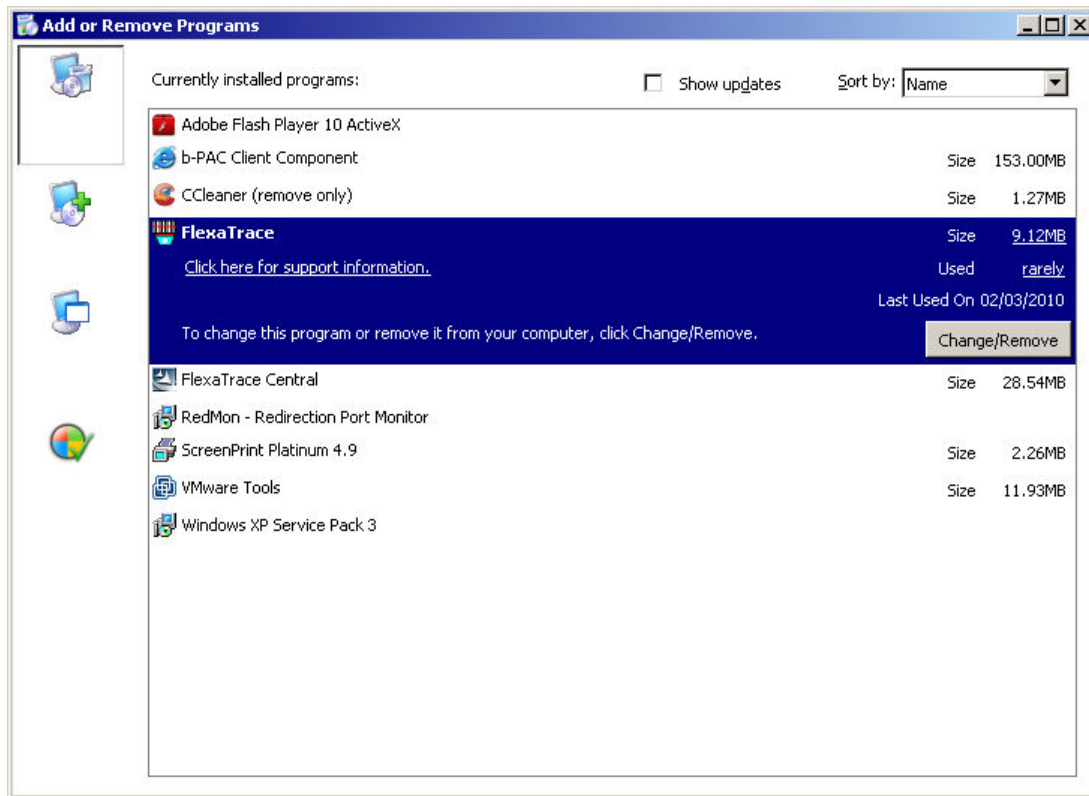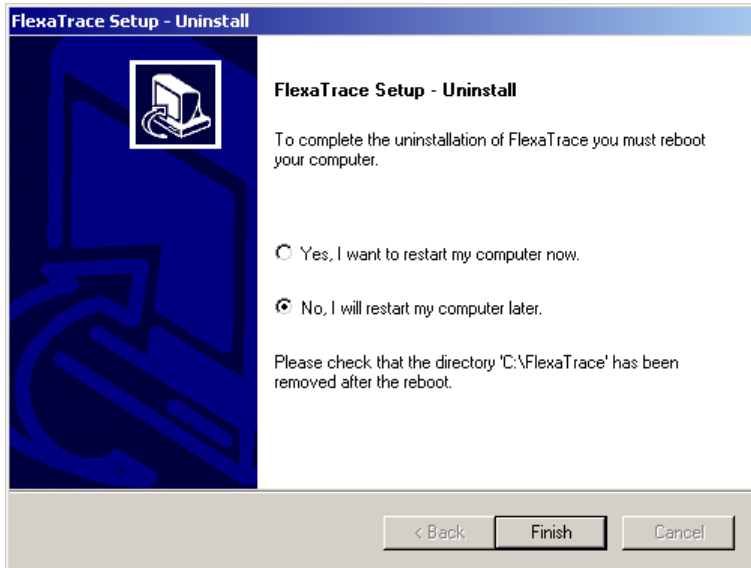

Click on the FlexaTrace entry then click the "Change/Remove" button. The FlexaTrace Client setup program will run in Maintenance mode.
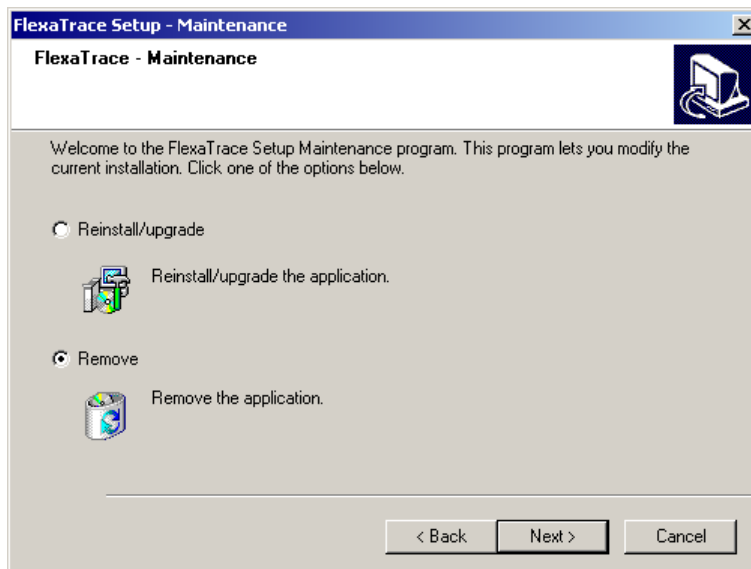
Click on the "Remove" radio button then click Next.

Click on Yes to confirm that you wish to remove FlexaTrace.

After the FlexaTrace client has been de-installed, the PC needs to be restarted to remove some files which are locked by Windows. Select the appropriate restart option and click Finish. The files will be removed when the PC restarts.