

RoboVet 5

What is New in Cougar Banana (FP40)

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INTRODUCTION

In this release we have made improvements to several different areas of RoboVet, these include the following:

Single Sign On - employees will now have the ability to login using the current windows user login details when RoboVet is started.

Expose Client ID - we have exposed the client ID on the client record; additionally, users will now be able to see the unique client ID on appointments, client facing documentation and on seven key reports. Both animal and animal referral labels can now display the client ID.

Filtering within a POS group - we have added the ability to filter for products that contain a specified POS product within a POS group.

Filtering for POS Group and POS group products on an NSM – users will now be able to filter for POS group and POS product information on an NSM.

In addition to the new features being released we have fixed several bugs.

IMPORTANT SETUP INFORMATION

All sites that use VetLogic must have at least VetLogic 1.2.4.9 installed/reinstalled after being upgraded to RoboVet Cougar Banana (FP40). Support will check, and action as needed as part of the upgrade procedure.

Since FP25, RoboVet has required .Net 4.5. Please note that this is not supported on Windows Server 2003.

OPTIONAL SETUP INFORMATION

There are new settings in this RoboVet Release. Note that the settings are configured in the background and can be added by a member of the **Support Team**.

- There is a new setting and configuration required to enable Single Sign On. Please contact support if you wish to have this set up.
- A setting was added in the previous release, FP39, to enable searching by Client ID. Having this setting switched on will now expose the Client ID in the areas mentioned above. Please see the section 'Expose ClientID' for more details.
- A new setting has been added which users can switch on if they wish the choice of Operation Type to influence the Appointment Reason. Please see the section Bug fixes: 'Operations Diary not updating the Appointment Reason on changing the Operation Type' for more details.

GENERAL ENHANCEMENTS

Single Sign On

Please contact support to switch on this functionality – there is additional configuration required as well as adding the background setting that activates the new field detailed below.

Employees - Assign windows user to employee

A new field has been added to the **Users** screen within **Options**, which enables a user to assign a windows user to an employee (RoboVet user).

The following validation exists on the new field:

- must be unique to an employee.
- cannot exceed 100 characters
- cannot contain any special characters that are excluded by active directory rules (" / \ [] : ; | = , + * ? < >)

The screenshot shows the 'Options' screen with the 'Users' section selected. The 'Windows user' field is highlighted with a red box and contains the text 'Locum.Vet'.

Login using windows user

Employees will now have the ability to login using the current windows user when RoboVet is started. As stated above please contact support to switch on this functionality.

A link will be displayed under the password or employee code field that includes the currently logged in windows user. When this link is selected, the employee will be logged in as the RoboVet user that is assigned to the windows user.

Logon

Employee Code

OK

Cancel

[Login as Locum.Vet](#)

Logon

Name:

Password:

OK

Cancel

[Login as Locum.Vet](#)

Logon

Employee Code

OK

Cancel

[Login as Locum.Vet](#)

Database:

Robovet
Training

Logon

Name:

Password:

OK

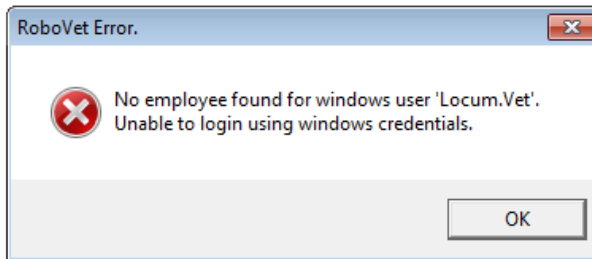
Cancel

[Login as Locum.Vet](#)

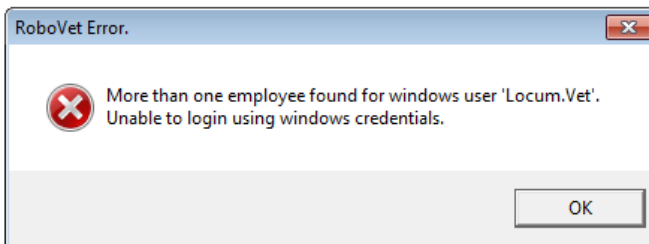
Database:

Robovet
Training

If the windows user has no employee associated with it, the following error will be shown:



If the windows user has multiple active employees associated with it, the following error will be shown:



The same functionality is available when changing user, so the employee can click to change to the current windows user, or can enter employee details to login as a different user.

When RoboVet times out, employees can use the link to log back in as the current windows user. Where the setting RoboVet/Preferences/IdleTimeOutAllowChangeUser is enabled, the employee will be shown an error message if the current windows user is not the same as the currently logged in RoboVet user.

Login bypassing login screen

Users with windows login mode enabled will be able to log in to RoboVet by clicking on the icon, bypassing the login screen. When an icon is set up with a database specified or Terminal Mapping is configured for machines with a database specified, then clicking on the RoboVet icon will log the user straight in as the employee associated with the current windows user. If no employee exists for the current windows user an error will be shown, and the login screen will be presented to the user.

Where Terminal Mapping is not in use, and the RoboVet icon does not have a database specified, the login screen will be presented to the user as normal.

Product List

Filter for products within a POS Group

A new filter has been added to the product filters screen on the POS tab. This will enable users to filter for products that contain a specified POS product within a POS group. The filter can be set to 'Equals', 'Starts With' or 'Contains'.

In the example below, the product list will display products where "ACP Injection 2mg/ml" exists as a POS product.

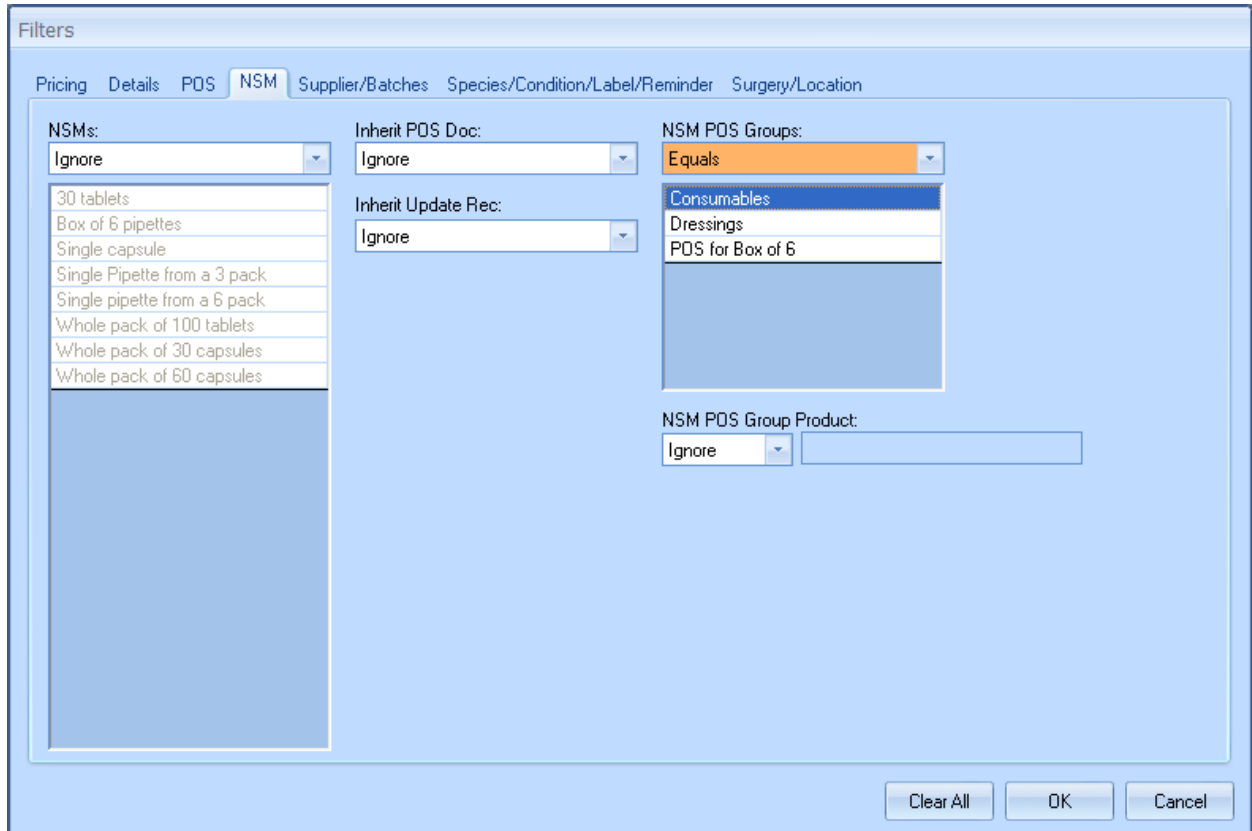
The screenshot shows the 'Filters' dialog box with the 'POS' tab selected. The 'POS group product' dropdown is set to 'Equals' and the search field contains 'ACP Injection 2mg/ml'. The 'Update record' dropdown is open, showing options: Ignore, Equals, Starts With, and Contains. The 'Standard fees' list includes Dispensing Fee, Injection Fee 1, Injection Fee 2, Injection Fee 3, and Special Dispensing Fee. The 'Documents' and 'Sell only to' fields are empty. The 'Only show overrides in use' checkbox is checked.

Filter for POS group and POS group products on an NSM

Two new filters have been added to the product filters screen on the NSM tab. This will enable users to filter for POS group and POS product information on an NSM.

The NSM POS group product filter can be set to 'Equals', 'Starts With' or 'Contains'. When this filter is used, it will return products that have an NSM where the NSM has a POS product that matches the search criteria.

The NSM POS group filter can be set to 'Present', 'Not Present' or 'Equals'. When this filter is used, it will return products that have an NSM where the NSM has a POS group that matches the search criteria.



Expose Client ID

The Client ID is now displayed in a number of areas as follows. This functionality is enabled by adding a background setting to show the ClientID, and this setting is required for it to appear in all the following areas. Please contact support if you wish to add this setting.

Display of client ID on the client record

Users will now be able to see the unique client ID when working within a client record. The client ID is appended to the client name in the 'work with' and is shown on the 'Info' tab on the client record.

Miss Ellie Smith (£0.00)

Info Notes/Other Exclusions

Classification **1-287853**

Client type: 1 Small Animal
 Home surgery: Good Vets
 Travel band:
 Inactive: No

Financial

Account Terms: 1 Small Animal
 Debt Severity: No debt
 Last statement: 01/01/1970
 Credit limit: None
 Charity: No
 No VAT: No

Display of client ID on appointments

Users will now be able to see the unique client ID when creating or changing an appointment or inpatient booking. The client ID will be displayed under the client name. The animal ID has been moved to under the animal name to keep the placement consistent throughout.

Inpatient

Animal	When
1-581936	Wed 20 Feb 2019
Minnie	
Cat, Female	
Weight: 2.78 kg (20/02/2019 12:28)	
Client	
1-287853	
Miss Ellie Smith	
1 Home Street	
Edinburgh	
EH4 2HS	07771112022 (mobile)

Appointment
Animal 1-581936 Minnie Cat, Female Weight: 2.78 kg (20/02/2019 12:28)
Client 1-287853 Miss Ellie Smith 1 Home Street Edinburgh EH4 2HS 07771112022 (mobile)

Display of Client ID on client facing documentation

Invoices, Statements and Credit Notes will all display the relevant Client ID at the top of the report, in line with the image shown below.

Good Vets Veterinary Centre Ltd

goodvets.com/net/hello.co.uk/gov

Invoice No. 1-6708

Client ID:1-41400

123 Street Lane
AB12 3CD

Telephone: 098765432104
Fax: 455488485412
Email: iwzkivs67@black.com

Mr John Smith
Orchard Brae House
30 Queensferry Road
EDINBURGH
EH4 2HS

VAT RefNo. 111 222 333

Tax Point Date: 07/03/2019

	Net	VAT	%	Total	Balance
 pudding					
12/04/2018 Standard Test User 2					54.87
60.00 x Phenobarb Tabs 15mg (Cd Sch3)	37.22	7.44	20.00	44.66	
1.00 x Metoclopramide Tabs 10MG-30 tablets	8.51	1.70	20.00	10.21	
Totals For Pudding	45.73	9.14		54.87	54.87

Statements also include the Client ID at the bottom of the remittance slip.

(Please Detach This Portion And Return With Your Remittance)

Mr John Smith
Orchard Brae House
30 Queensferry Road
EDINBURGH
EH4 2HS

Statement Date: 07 March 2019

Tax Period: 07/03/2019 To 07/03/2019

AMOUNT DUE	£198.02
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BACS Payment can be made to:
Acc Name: Good Vet's Ltd.
Acc No: 01234567
Sort Code: 12-34-56
Please use surname as reference

Client ID: 1-41400



Using RoboVet(TM) From Veterinary Solutions Limited

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The Animal History report has also been updated to include the Client ID, positioned with all the other client information, as shown below.

Good Vets Veterinary Centre Ltd

goodvets.com/net/hello.co.uk/gov

Good Vets

123 Street Lane

Animal History

AB12 3CD

098765432104

Mr John Smith
Orchard Brae House
30 Queensferry Road
EDINBURGH
EH4 2HS

Vat Reg. No. 111 222 333

Client Home: Not Available

Client Mobile: 01315560555

Client ID: 1-41400

Client Email: john.smith@covetrus.com

Client ID on Animal and Animal Referral label

The Animal Referring Label now includes the Client ID. Additionally, the Animal ID has been brought into line with the animal's name in order to prevent confusion between the displayed IDs.

<i>Referred By:</i>	Dr J Jones (MRCVS) Covetrus Referrals	
<i>Animal:</i>	Pudding Retriever - Labrador (lab)	1-119568
<i>Client:</i>	Mr John Smith 01315560555 (mobile)	1-41400

The Animal label also displays the Client ID.

Pudding (1-119568)	
Dog (canine - Domestic)	
Retriever - Labrador (lab	
Colour Unknown	
Male	
1yr 3mth 26dy	12-11-2017
Mr John Smith (1-41400)	

Where a user prints Animal Labels for multiple animals for a given client, the Client ID is not shown. This is in line with the existing 'Show Animal ID' functionality.

Display of client ID on existing reports

The following reports will display the Client ID (added to the right hand side of the report).

- Data Protection Report
- Scheme Accounts
- Quick Client Aged Debt
- List Write Offs
- List Refunds
- List Payments
- List Credit Notes

Where reports have Mail Merge capabilities, the Client ID is also available to users there.

BUG FIXES

Prevent deletion of system group 'Lab Work'

If a user were to delete the system organiser group 'Lab Work', it would result in RoboVet's Auto-Import feature failing to attach laboratory results to their consultations, leading to a build-up of failures.

RoboVet's Organiser feature has now been modified such that the 'Lab Work' group, or any other equivalent group defined in the configuration when the Lablink module is installed,

cannot be renamed, removed or set to 'not public'. Where the 'Lab Work' group had previously been set to 'not public', the user will be able to change it to 'Public'.

Increase RoboVet speed for users with lots of messages and tasks.

If an employee were to have lots of messages, tasks or requests, this would slow down their RoboVet session quite significantly. This was due to RoboVet constantly loading the Organiser screen at short intervals even though the employee was using another part of RoboVet. Due to RoboVet constantly loading the Organiser screen, it meant it was constantly fetching the employees messages and tasks which caused performance issues.

In this release we have made changes so that if an employee is in any screen except the Organiser screen, it will not constantly load the Organiser data. It will still update the notifications bar in the bottom left hand side of RoboVet, however it will do it in a much more efficient manner.

This will mean a user will notice a performance increase when they are in any screen except the Organiser screen.

As previous, if an employee is noticing a slow down whilst in the Organiser screen, they will still need to manage their messages and remove any that they no longer require. This can be done by multi-selecting unwanted messages and then deleting them.

Delete employees from organiser groups when employees are removed from RoboVet

If an employee is removed from RoboVet prior to this release they would still be part of any organiser user groups. Other users would still be able to send messages to the removed user (as part of the group) even though they are no longer in RoboVet. Tasks sent to a group could also be created for these users when lab results are auto-imported on to animals' records.

In this release when an employee is removed via the Options menu, they are also removed from any organiser user groups they may be part of.

As part of the upgrade, if there are any historically removed users that are still part of any organiser user groups, they will be removed from those organiser user groups.

Payment allocation window

New controls were added to the Payment Allocation window during FP38 to allow users to email receipts to clients. The implementation didn't allow for some configurations of this screen, resulting in some elements of the window overlapping other elements of the window.

The Payment Allocation window has been updated so that all applicable controls on the window are visible in all configurations. This includes when the window is triggered from the Quick Pay, Pay and Manual Allocation buttons.

Clearing of Flea, Worm and Vaccine POS Actions on Change Sale

When selling a product that uses a Flea, Worm or Vaccine POS Action, the user can choose to set the date that the treatment was administered via the applicable Update Record POS Action that appears on the sales prompt screen. If the user then clicked the 'Change Sale' option from the sale line's context menu, the added Update Record POS Action was cleared.

This has been fixed in this release to ensure that the change sale does not clear Update Record POS Actions. The only deviation from this is when the user changes the quantity of the parent product to zero, thereby switching to the existing upsell function. Where the Flea, Worm or Vaccine treatment is sold as a child product, and the child product's quantity is set to zero through a 'Change Sale', the respective Update Record POS Action will remain in place, in line with other existing POS Actions.

Zeroing 'Sell At Cost' sale line on Change Sale

When selling a product that applies a 'Sell At Cost' benefit from a scheme, and the user then subsequently clicked the 'Change Sale' option from the sale line's context menu, the 'Change Sale' screen was then recalculated to zero.

This is now fixed, and products sold with the 'Sell At Cost' benefit, retain the pricing with which they were originally sold, when clicking on 'Change Sale'

Operations Diary not updating the Appointment Reason on changing the Operation Type

When creating an appointment in an operations diary, if a user selected an Operation Type prior to populating the Appointment Reason/Why field, the Appointment Reason field was changed to what was selected in the Operation Type. If the Appointment Reason was already populated, it would remain with the existing selection.

Where a user inadvertently selected the wrong Operation Type, also updating the Appointment Reason, and then amended the selection of the Operation Type, the Appointment Reason would still be set to the original incorrect selection.

In this release the behaviour around populating the Appointment Reason with the Operation Type has been updated. By default, the selection of an Operation Type will not change the Appointment Reason.

Should a practice wish the Operation Type to influence the Appointment Reason, then this can be configured using a background setting so that when selecting an Operation Type, if the Appointment Reason is blank, it is modified to the same text selected in the Operation Type. However, if the Appointment Reason is populated, it will be deleted on the selection of an Operation Type. This approach is designed to prevent the Appointment Reason accidentally being set incorrectly by an initial Operation Type which is subsequently corrected. Please contact support if you wish to add this setting.

Email animal history fails when client name contains a non-standard character

When creating an animal history to send via email, if the client or animal name contains any special characters, the animal history attachment may fail to generate properly. This is due to the client and animal name being used in the path to locate the attachment.

In this release the List Current Animal Consultation report that is used to email the animal history has been modified to strip out the special characters from the client and animal names when generating the email attachment, meaning that the attachment now gets generated successfully.