# Importing the BP Quality Improvement Dashboard for EMIS Web (Using Template Manager)

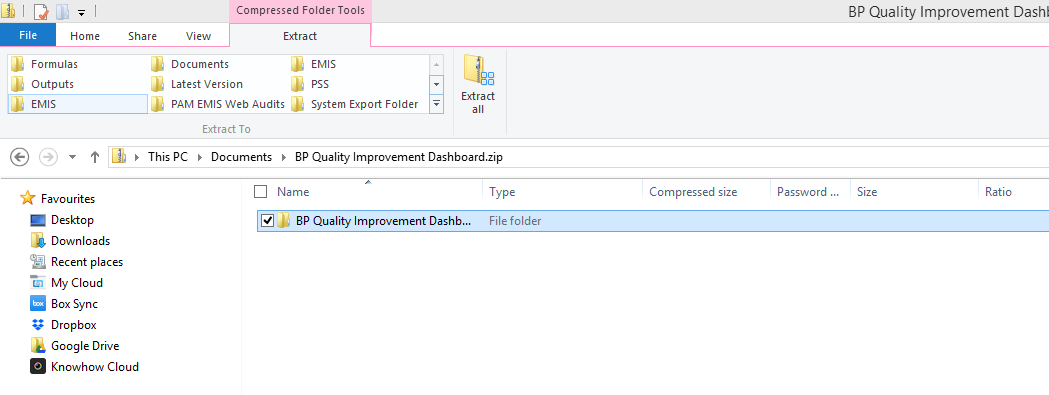
The dashboard comprises of reports to export the data required and a spreadsheet that provides the analysis and worklists identified for your patients. To use the dashboard you will need to have

The zip file will extract files and folders required for the dashboard to run. It is recommended that you extract the files contained within the zip file to your shared drive.

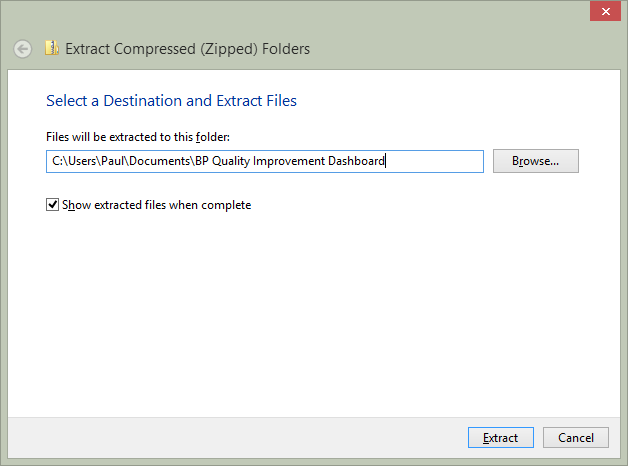
## Extract the files from the ZIP file

The dashboard and reports have been provided as a zip file which should be extracted to a secure folder on your shared drive. The zip file ‘**BP Quality Improvement Dashboard.zip**’ will default to creating a folder called ‘**BP Quality Improvement Dashboard**’ on the drive selected

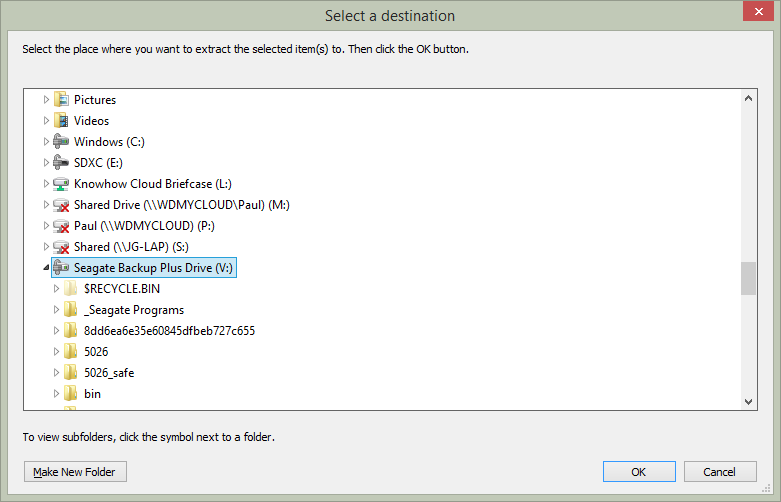
* **Open the received ZIP file** by double clicking



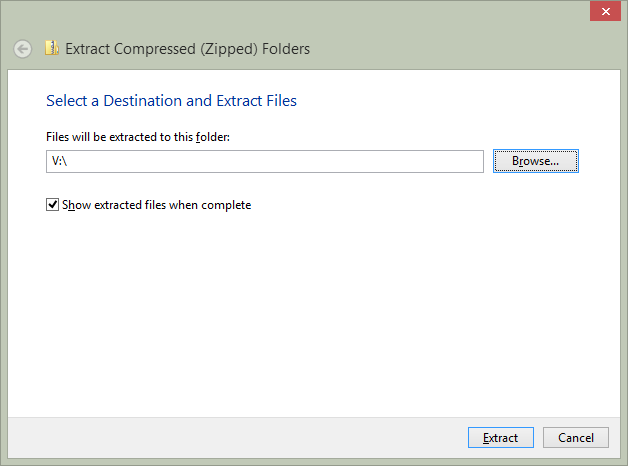
* Click **Extract all files**



* Click **Browse**



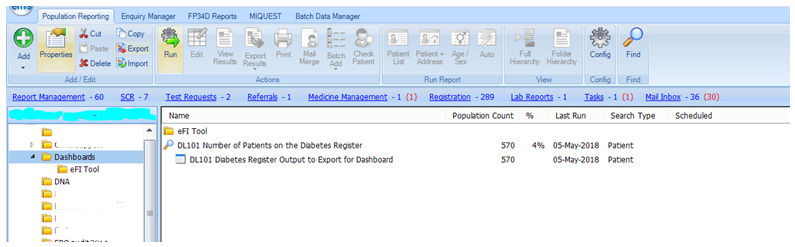
* **Browse to the shared drive (or create new folder in another location) to save** **the report file to** and click **OK**



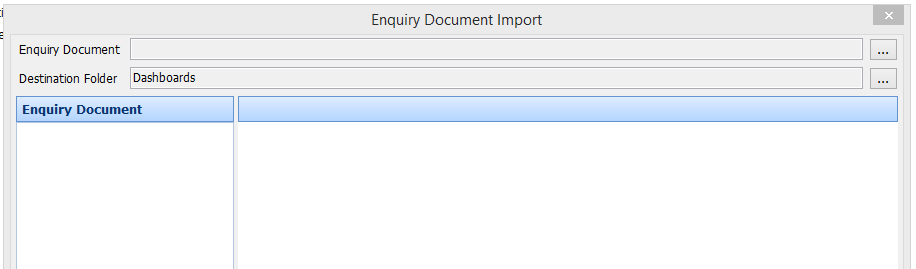
* Click **Extract** and confirm the folder saved to correct location and accessible

## Importing the Reports

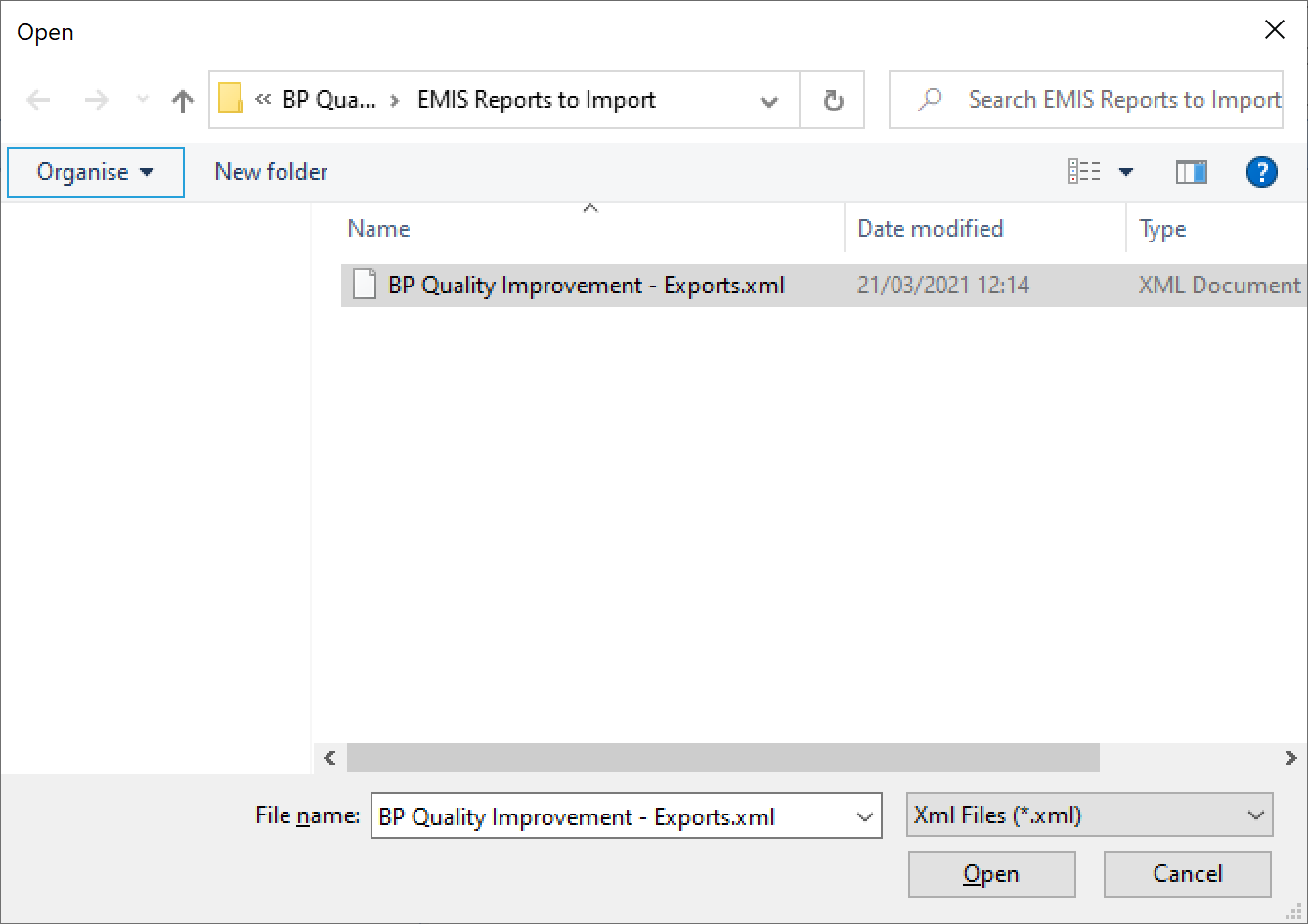
* You should be logged in to EMIS as a user with permission to access Population Reporting
* From the EMIS Web home screen select **EMIS** -> **Reporting ->** **Population Reporting** from the **EMIS Ribbon**



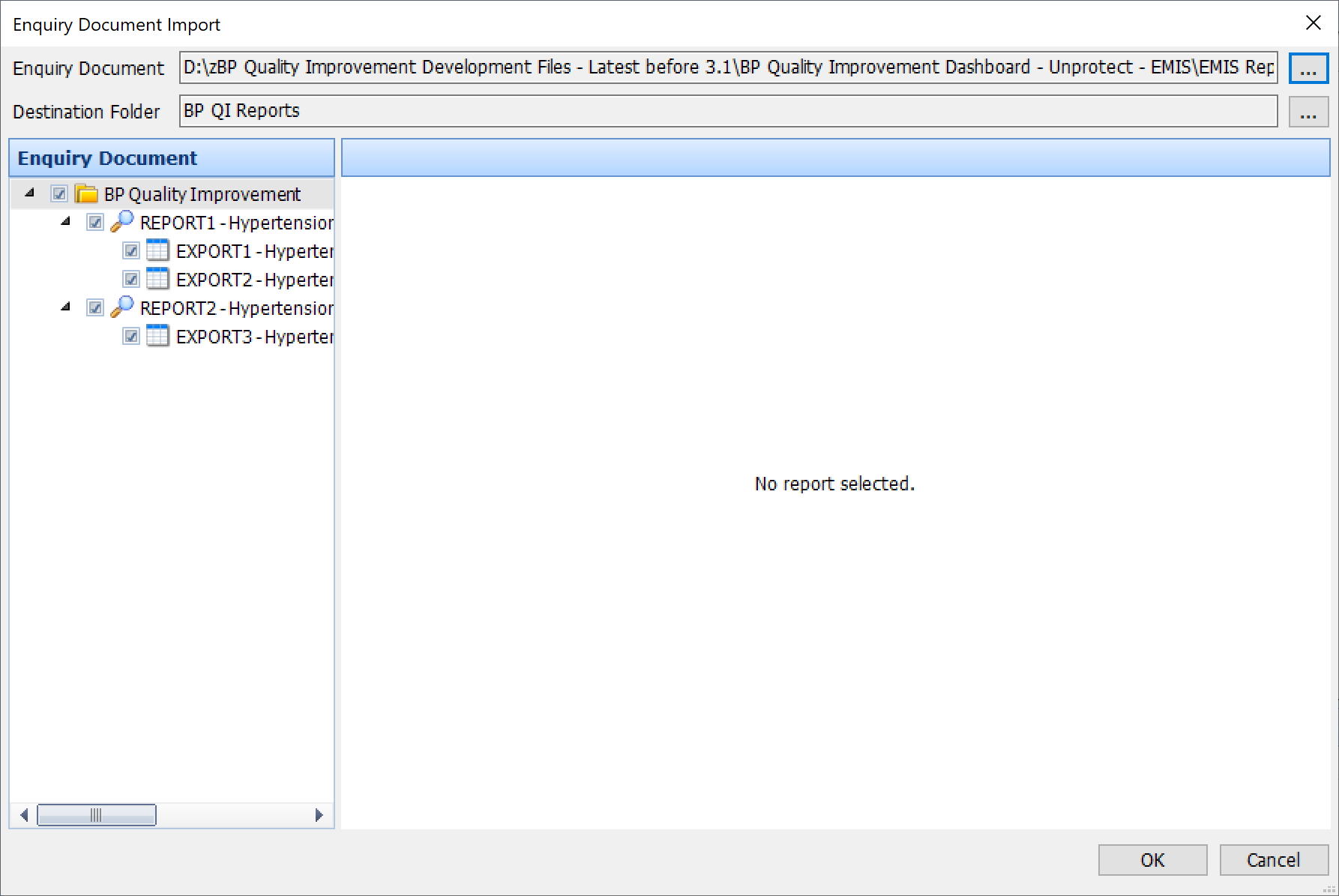
* **Select a Folder** (Add – New Folder if one does not exist) to save the new reports to and click **Import**



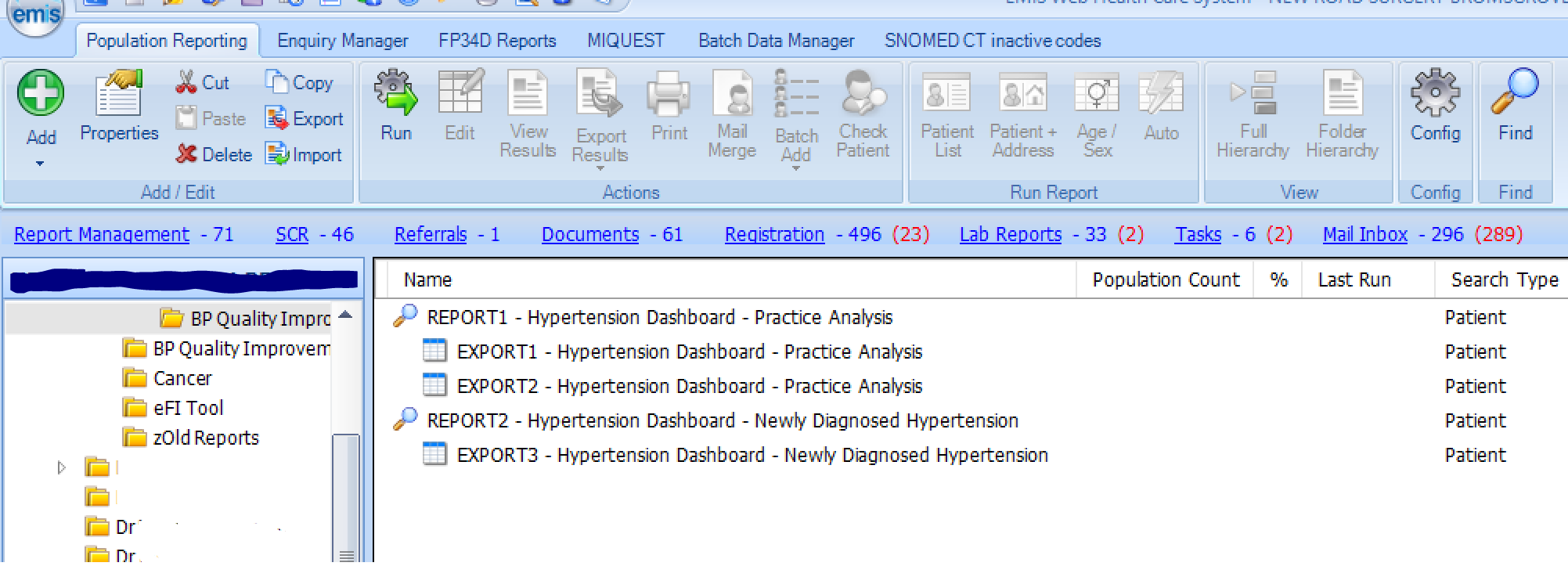
* For Enquiry Document Click **Browse** […] to select the Reports to Import



* Navigate to the location where the extracted file was saved **(<SHARED DRIVE> \BP Quality Improvement Dashboard\EMIS Reports to Import**) and select the ‘**BP Quality Improvement - Exports.xml**’ then click **Open**



* Ensure all reports are selected [✓] and Click **OK**



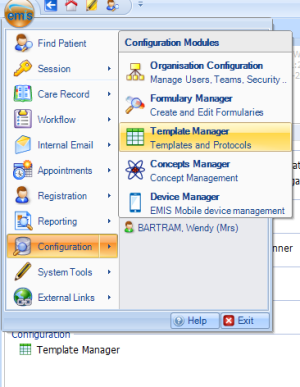
After a short time the reports will display on screen

## Importing the Protocols and Templates (Using Template Manager)

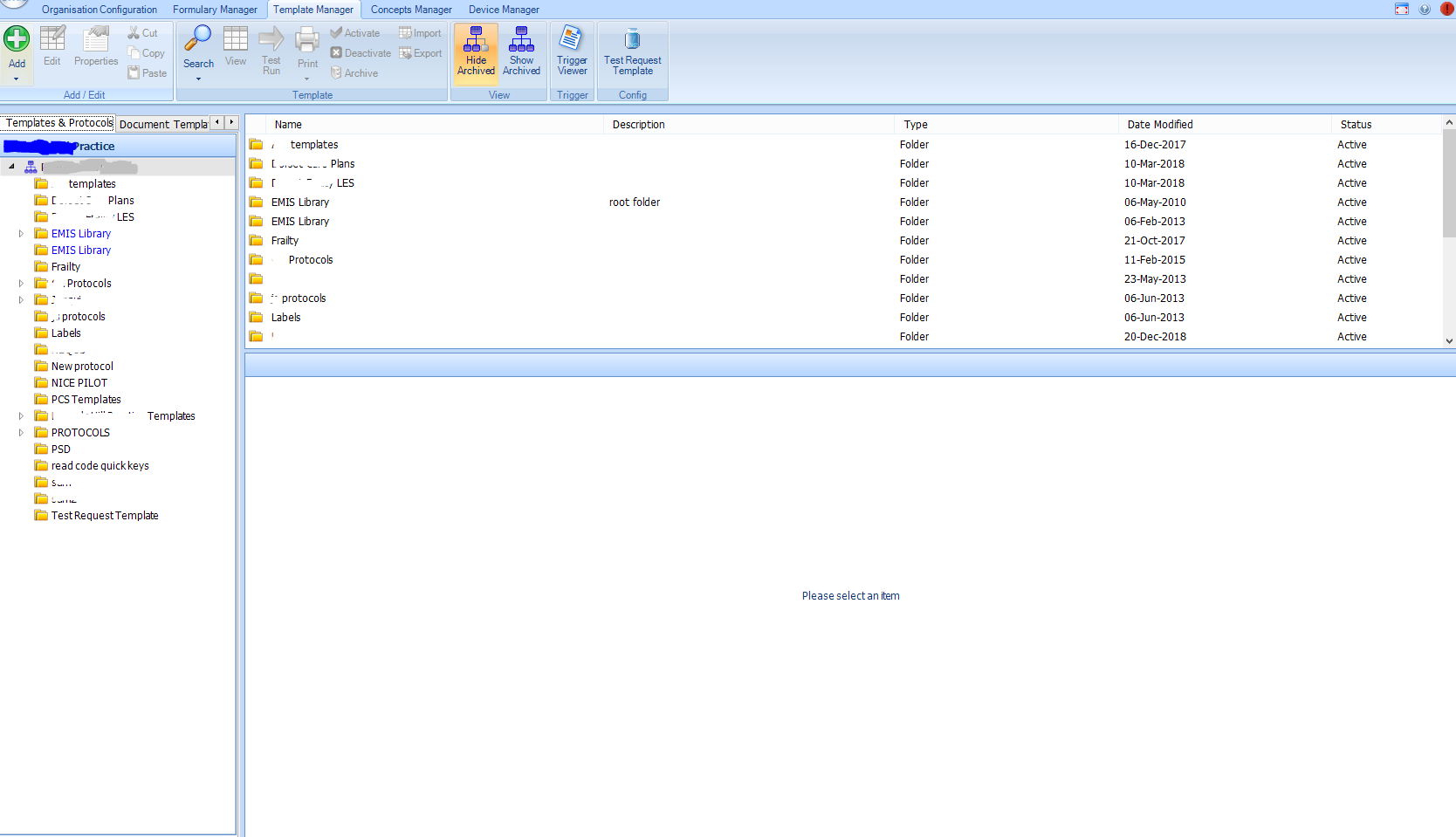
Before importing the protocols, templates and documents you should create folders in each of the template manager sections to store the resources we will import. If you already have folders you can use these but it would be recommended to create new folders for these new resources

* You should be logged in to EMIS as a user with permission to access Template Manager
* From the EMIS Web home screen select **EMIS** -> **Configuration ->** **Template Manager** from the **EMIS Ribbon**

The file to import should be included within the folder where the dashboard files were extracted to.



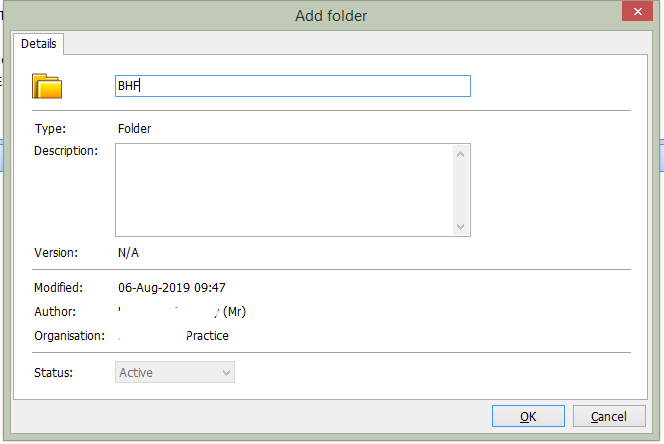
* From the EMIS button on the Home screen click **Configuration** then select **Template Manager**



* Ensure that the ‘**Templates & Protocols**’ section is selected

### Create a folder for the templates

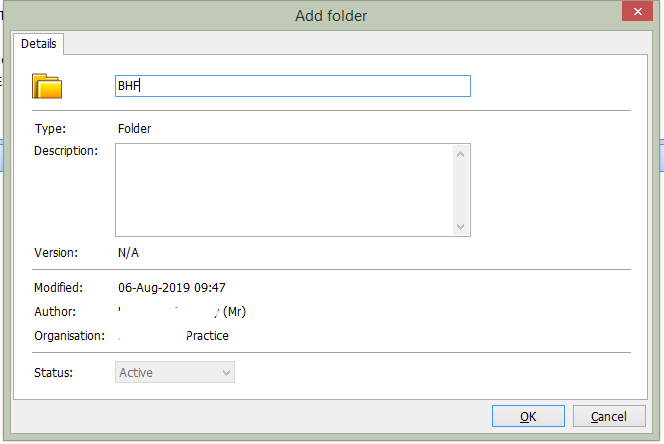
* **Select the folder** that contains your local templates and click **Add** then **Folder**



* Type ‘**BHF**’ as the name and Click **OK**

### Create a folder for the protocols

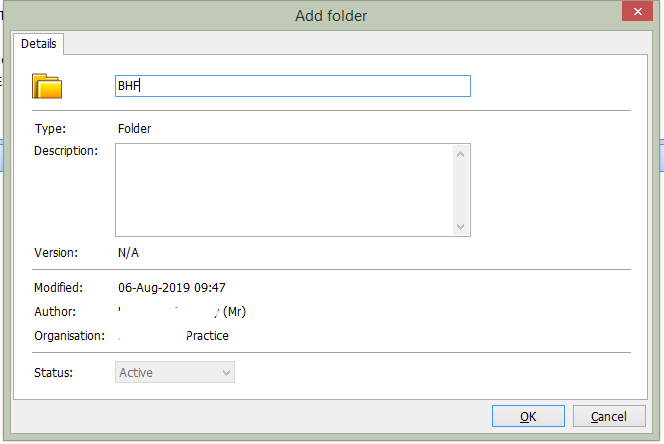
* **Select the folder** that contains your local Protocols and click **Add** then **Folder**



* Type ‘**BHF**’ as the name and Click **OK**

### Create a folder for the document templates

* Select the ‘**Document** **Templates**’ section
* **Select the folder** that contains your local document templates and click **Add** then **Folder**

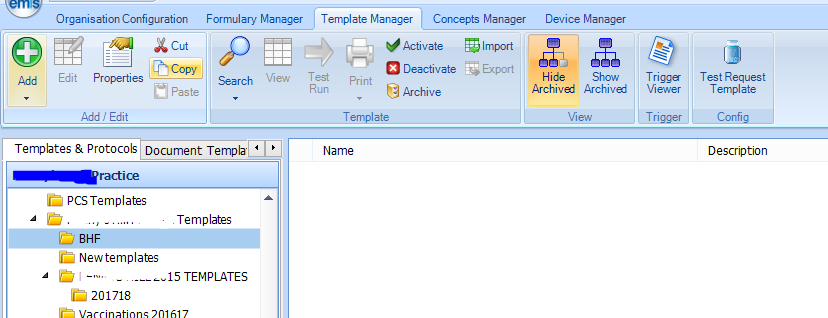


* Type ‘**BHF**’ as the name and Click **OK**

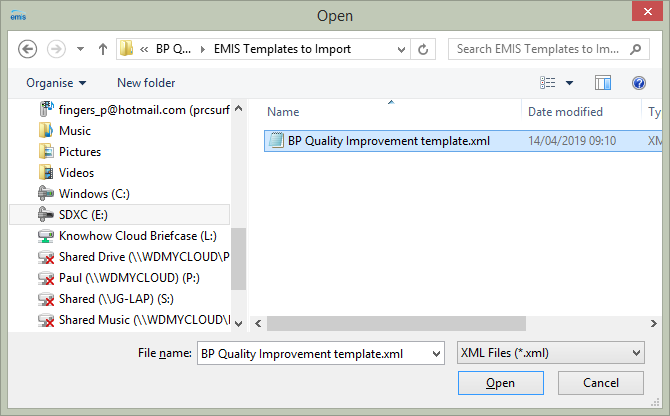
You should now have 3 folders for the files to be imported to

## Importing the Template (Using Template Manager)

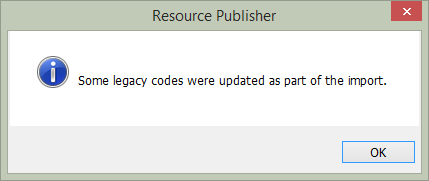
* Ensure that the ‘**Templates & Protocols**’ tab is selected
* **Select the folder** that contains your local templates



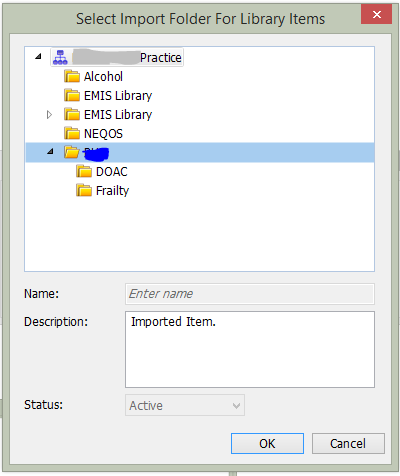
* Select the **BHF folder** then click **Import**



* Navigate to the folder files have been extracted to **(<SHARED DRIVE> \BP Quality Improvement Dashboard\EMIS Templates to Import)** and select the file **BP Quality Improvement template.xml** and click **Open**

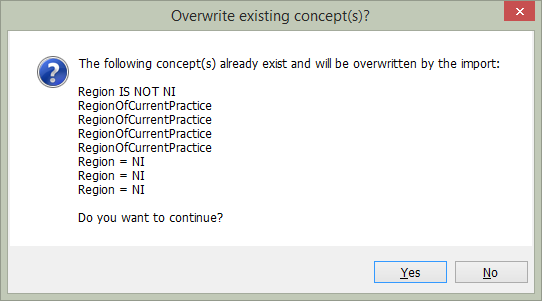


You may be presented with a message regarding legacy codes. Click OK

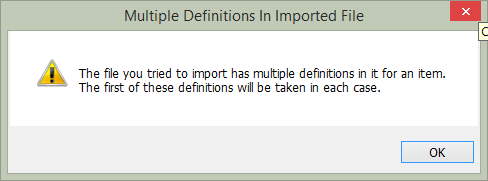


Some additional resources will be imported and will need to be saved to a folder in your library items. All additional resources used in the template have been named in a way to ensure any local resources you have are not overwritten. In the above example the practice library folder has been selected.

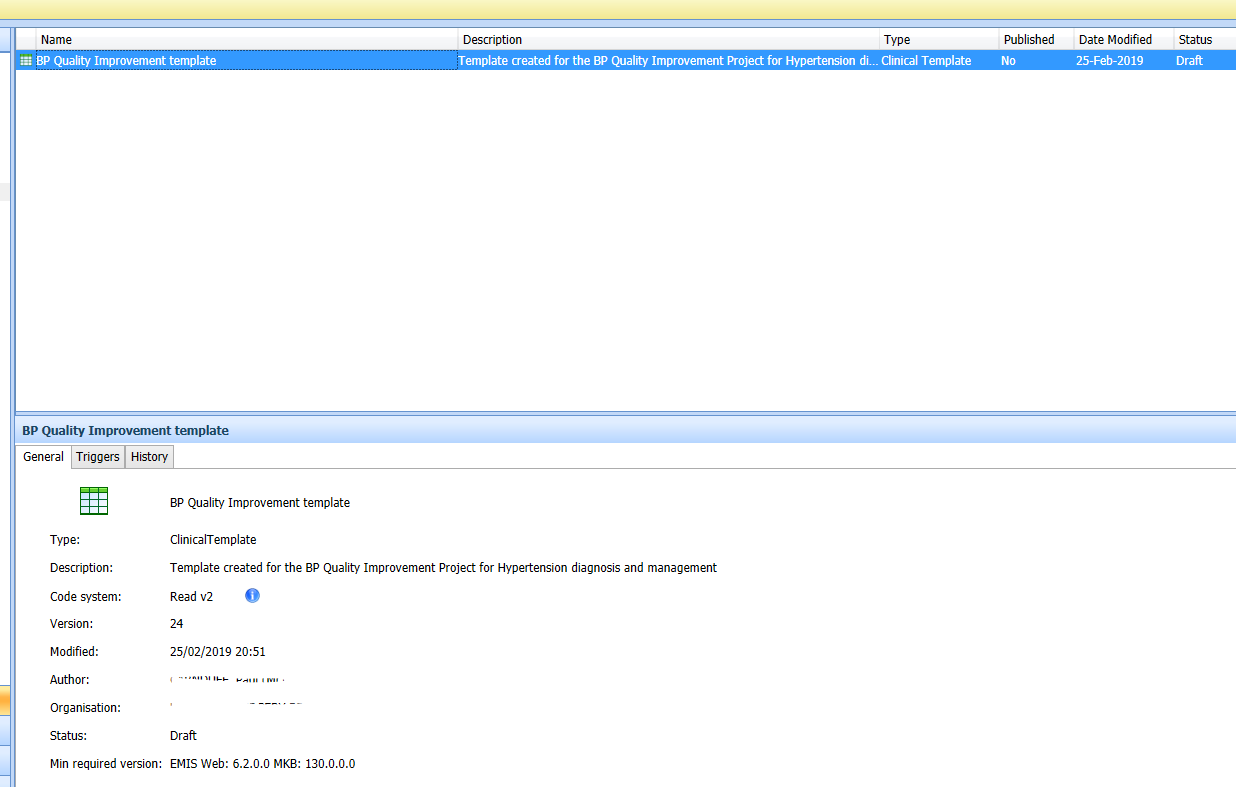
* Select the **Practice Library Folder** and Click **OK**



You may be prompted to overwrite some Concepts used by EMIS to determine the country for QoF Purposes



* Click **OK** to confirm use of definitions in template

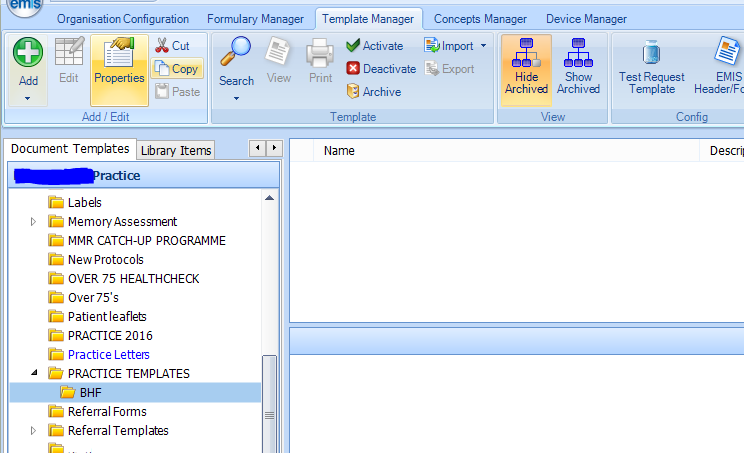


* After a short period of the time the guideline file display under the selected folder
* The template status is set to **Active** and can now be used

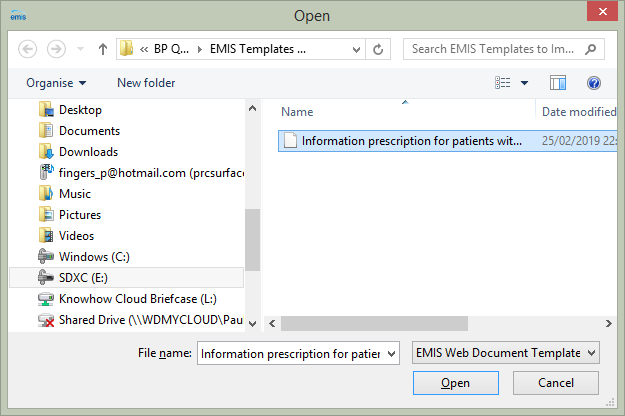
## Importing the Information prescription Document Template (Using Template Manager)

The Patient Information Prescription provides information for the patient and can be printed when the template has been completed.

* Ensure that the ‘**Document** **Templates**’ section is selected
* **Select the folder** that contains your local Document Templates

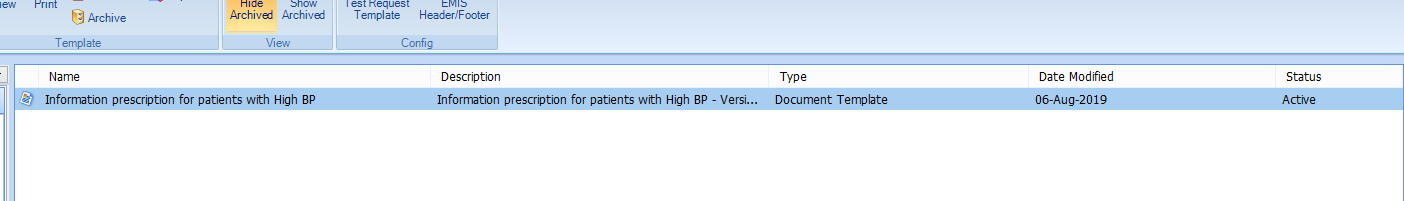


* Ensure the **BHF folder** is selected and click **Import** then **Document**



* Navigate to the folder files have been extracted to **(<SHARED DRIVE> \BP Quality Improvement Dashboard\EMIS Templates to Import)** and select the file **Information prescription for patients with High BP.ewdt** and click **Open**

After a short time the screen should refresh and the imported document should be displayed

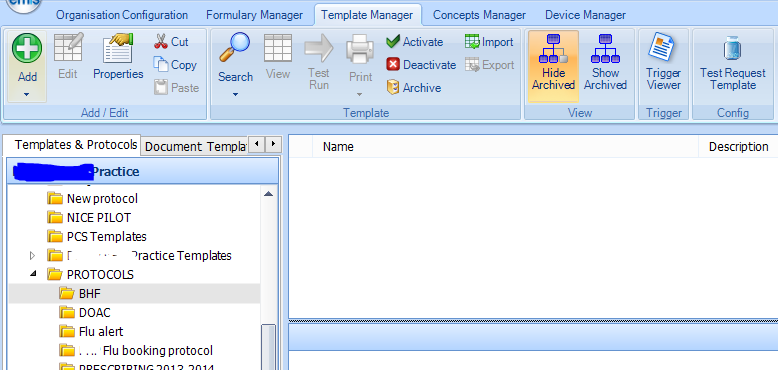


* The template status is set to **Active** and can now be used

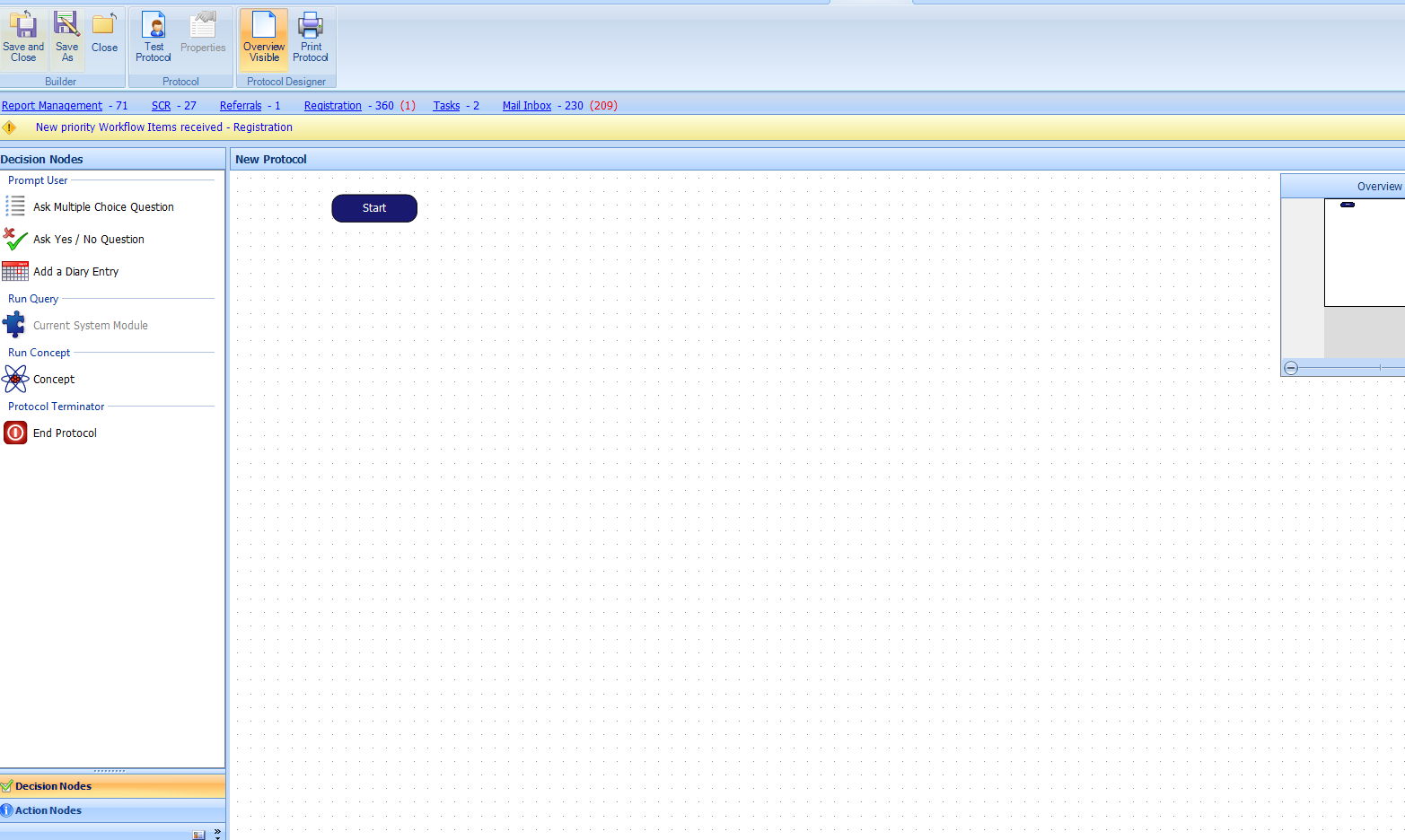
## Create a protocol to launch the Information Prescription automatically (Using Template Manager)

Due to an issue with importing protocols linked to documents you will be required to create a protocol that will trigger the document to launch automatically

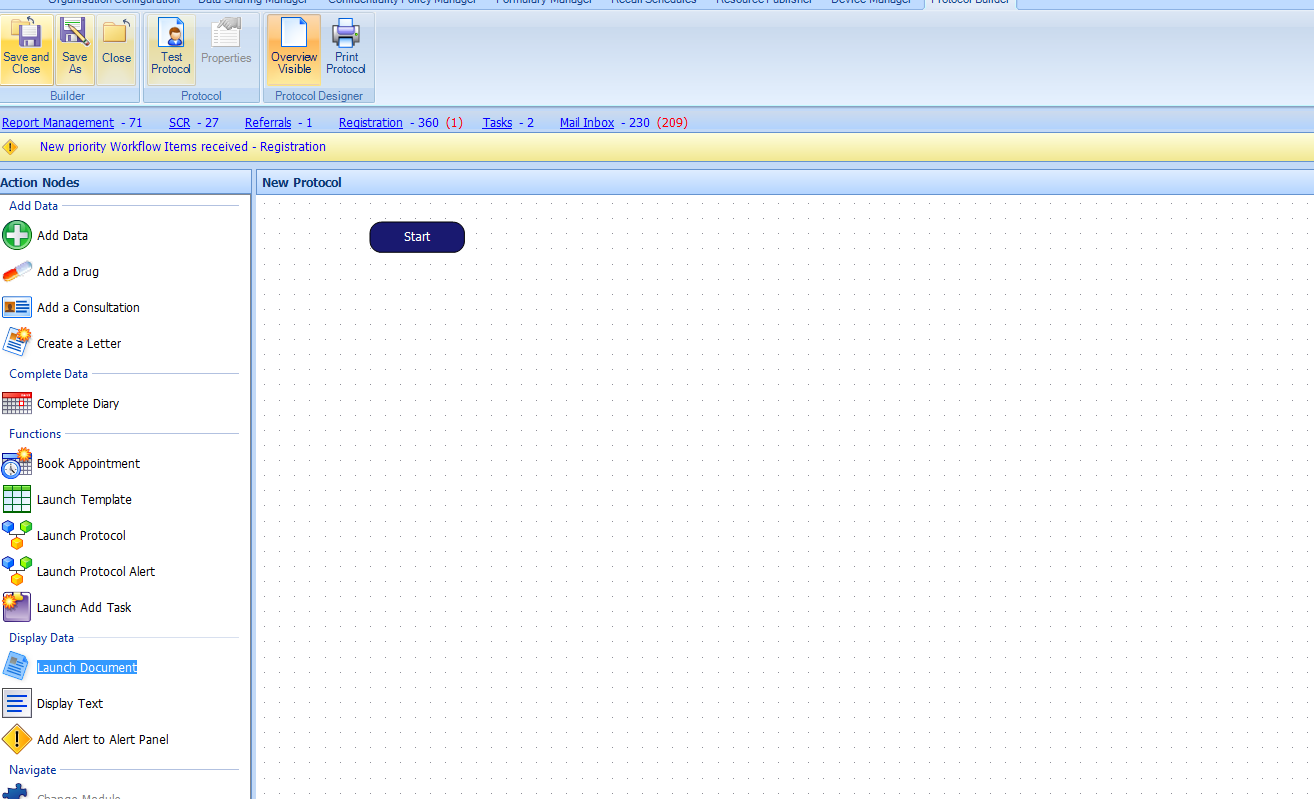
* Ensure that the ‘**Templates** & **Protocols’** section is selected
* **Select the folder** that contains your local Protocols



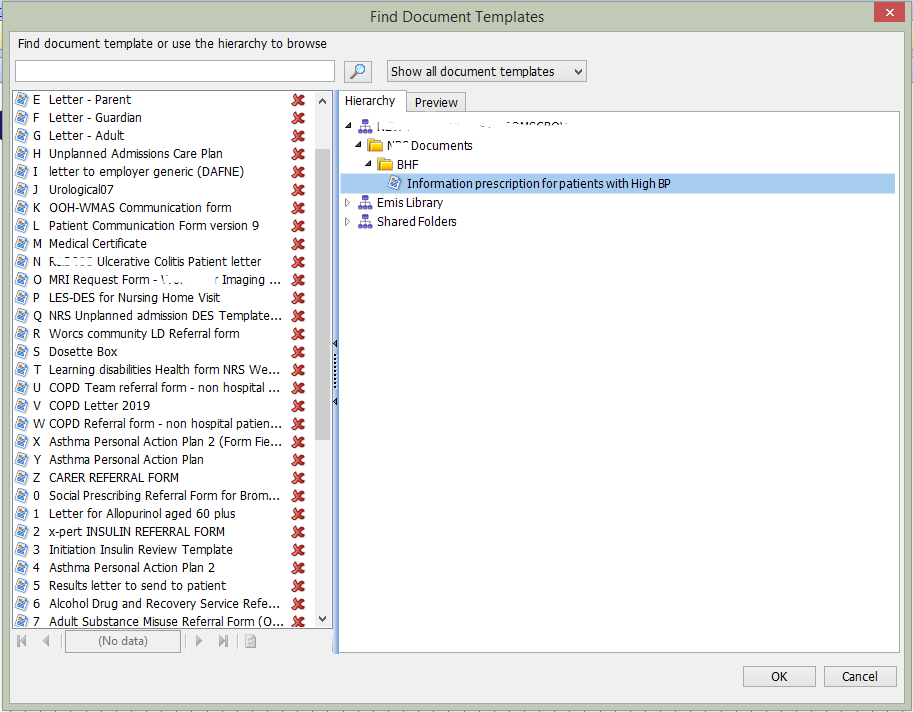
* Ensure the **BHF folder** is selected then click **Add** then **Protocol**



* The protocol screen is displayed. Click the **Action Node** section

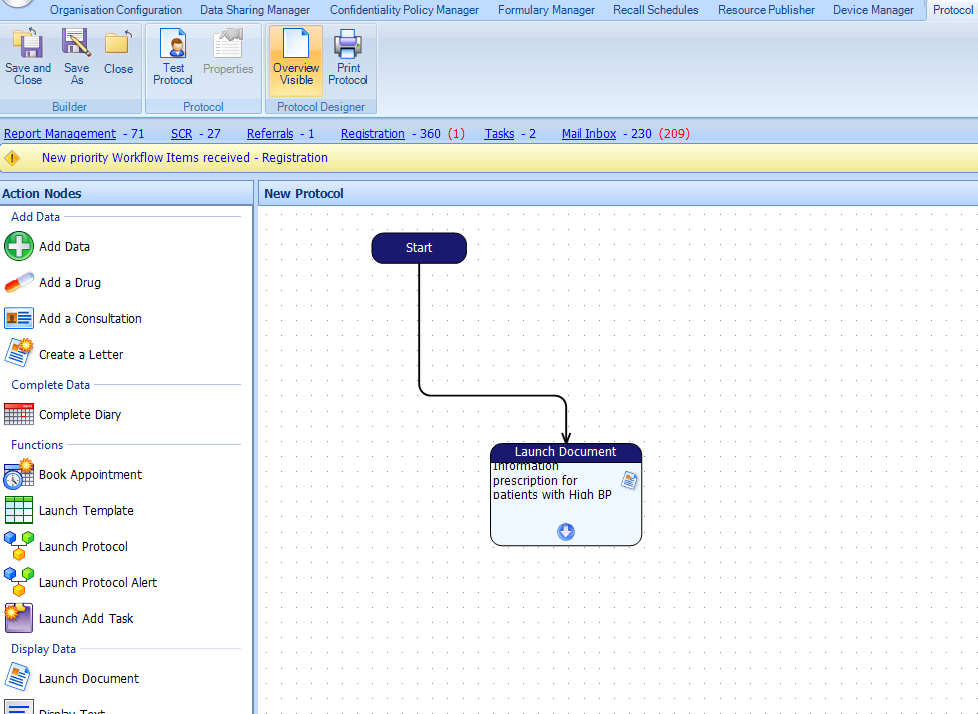


* **Click and drag** then ‘**Launch Document**’ action to the white area and release

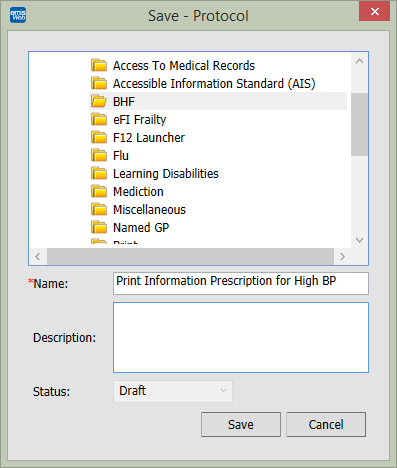


You will be prompted to select the document that we imported earlier. Navigate to the folder saved to or type **Information prescription** and search for the document

* Select the document to import and click **OK**

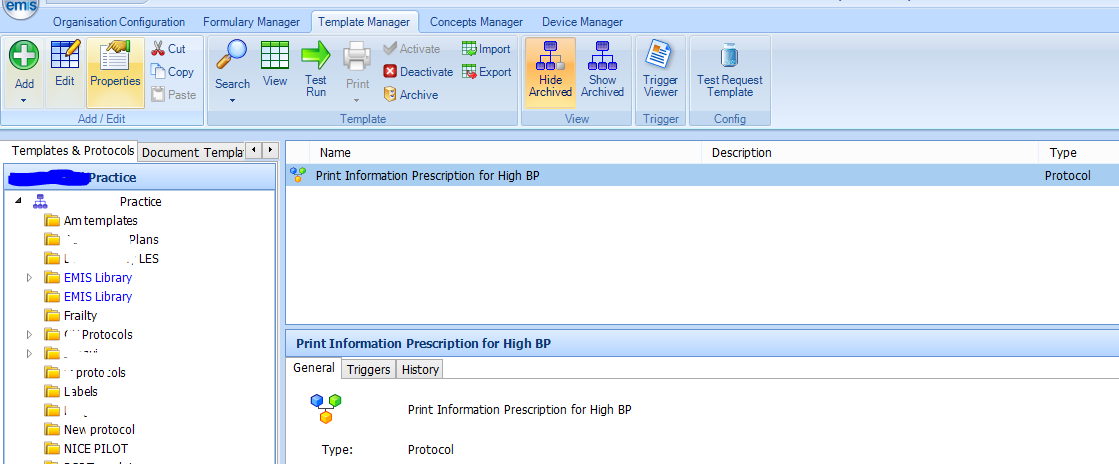


* **Click the bottom of the Start button and drag the arrow to the Launch document box** and release to link
* Click **Save and Close**

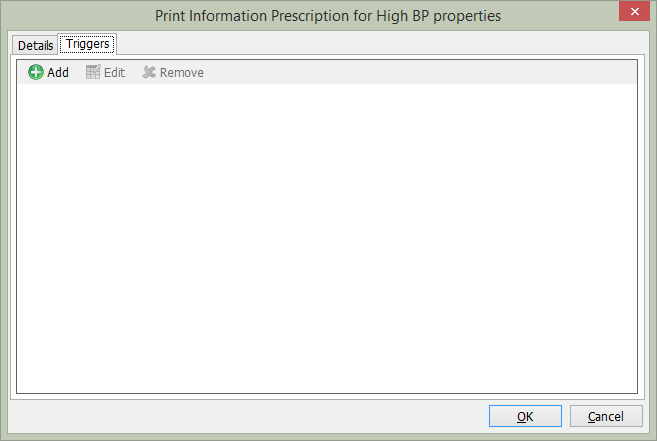


* Type a name for the protocol e.g. **Print Information Prescription for High BP** and click **Save**

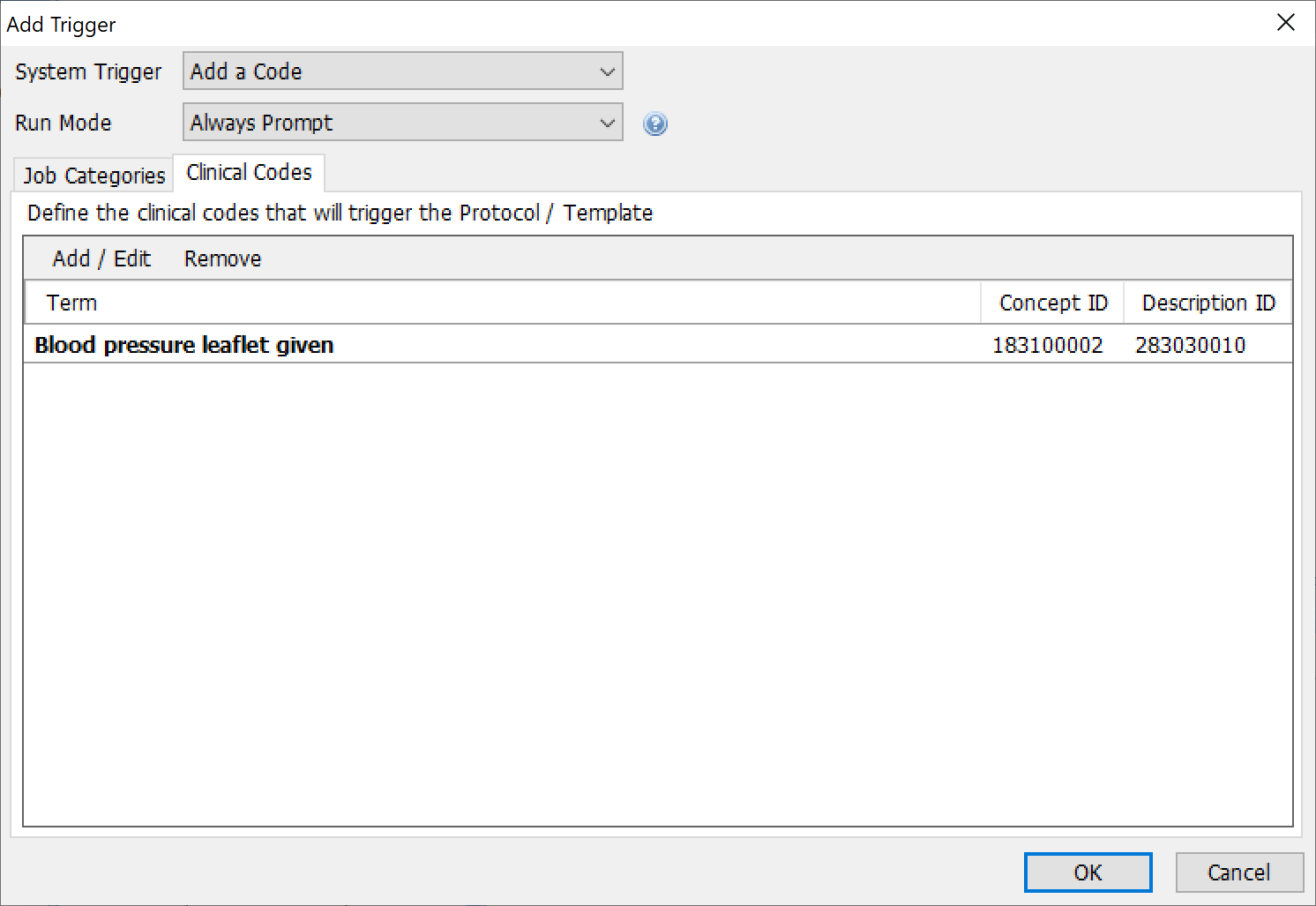
The protocol should have a trigger attached to it to launch when the option within the data entry template is selected.



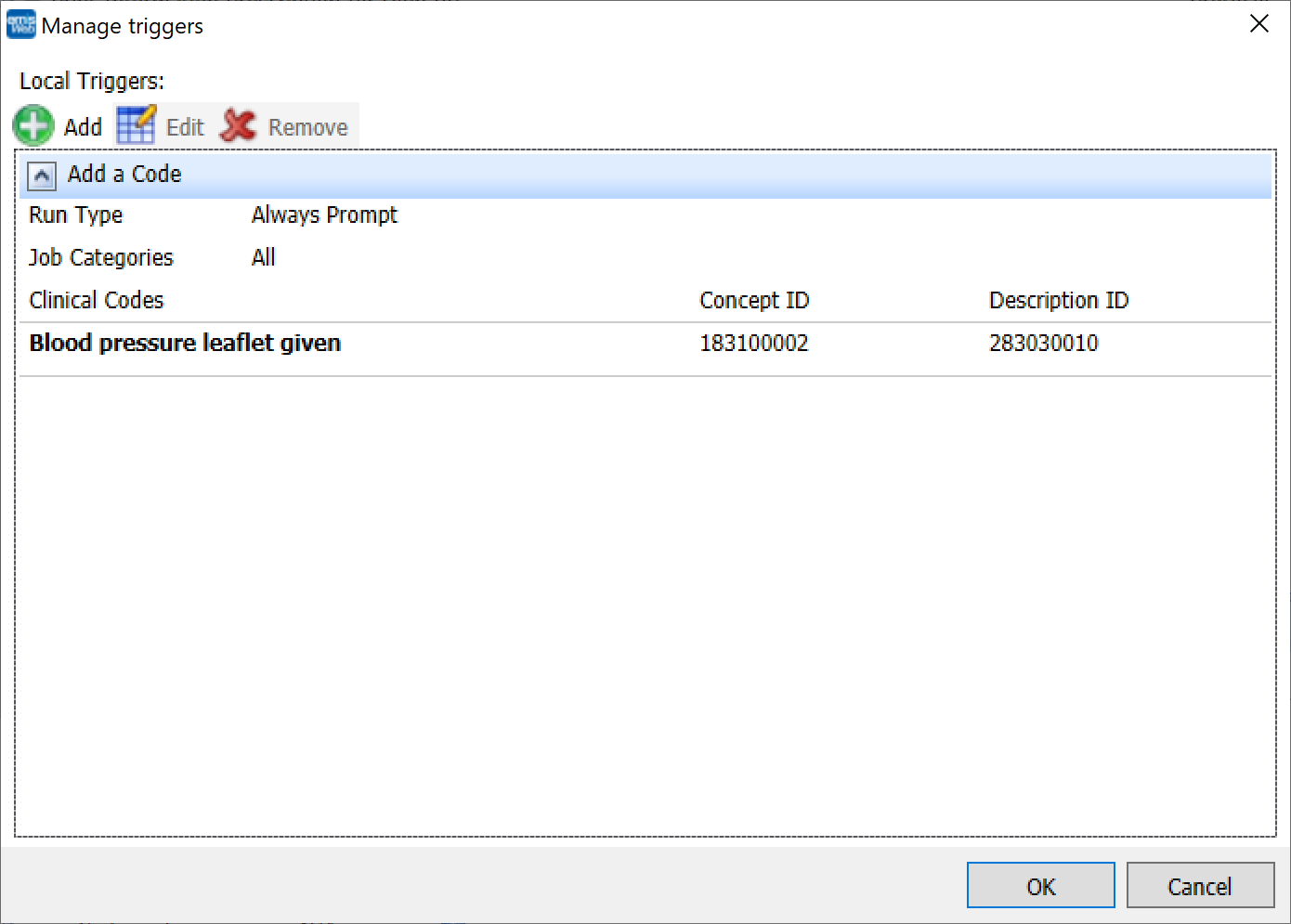
* Click to select the **Print Information Prescription for High BP** protocol and click **Properties**



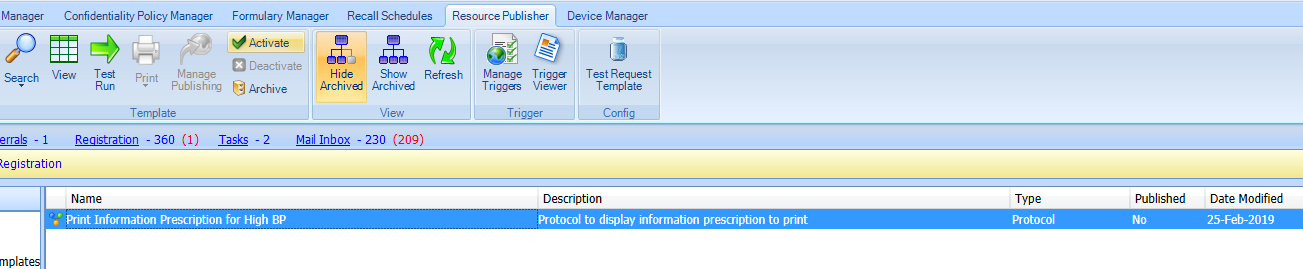
Click the **Triggers tab** and click **Add**



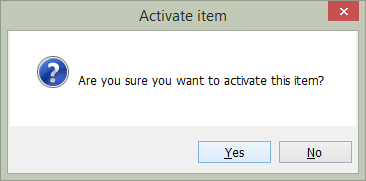
* Click to select ‘**Add a Code**’ for System Trigger
* Click to select ‘**Always Prompt**’ for Run Mode
* Click **Add / Edit** and select the Read Code for **Blood Pressure Leaflet Given 183100002**
* Click **OK**
* Click **OK** to return to the Resource Publisher screen



* Click **OK** to save the trigger



* Click to select the **Print Information Prescription for High BP** protocol and click **Activate**



The protocol has now been activated and will launch whenever the code 183100002 is added

Support

Any problems with Installing, Running or using the dashboard you should contact:

Paul Carnduff

[Paul.carnduff@nhs.net](mailto:Paul.carnduff@nhs.net)

07913 403587