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VISION

How To: Import a Guideline and add it to the Local Index

Importing guidelines into Vision has three stages

Guidelines have to be:

1. Downloaded to the server,
2. Imported into Vision
   Note: you may have to remove an old version first, see Appendix A.
3. Linked to your guideline index

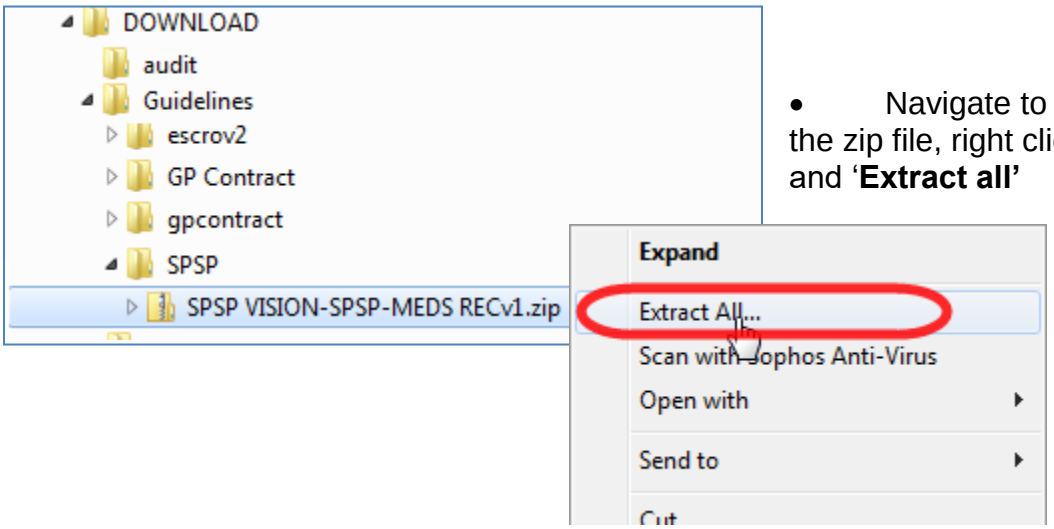
1. Downloading the guidelines to your server

- Normally a guideline will be supplied as a folder in a .zip file. Some sources (such as INPS and ESCRO) will provide it as a self extracting zip file which will automatically unzip the file for you. It will also automatically save it to O:\download\guidelines

- If the guideline does not automatically unzip, (e.g. guidelines on the mentor downloads page or an email attachment) you will need to unzip it before it can be imported into Vision.

To unzip a guideline

- From a web downloads page, Right click on the Guideline download icon and **'save target as'.** Save in O:\download\guidelines in a new folder.



- Navigate to the zip file, right click and '**Extract all'**

- Extract the entire folder to O:\download\guidelines. Do not attempt to do anything to the individual files in the folder; any interference with the guideline files will result in the guideline not importing properly.

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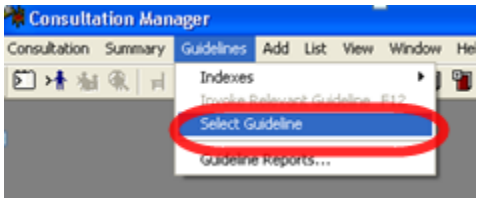
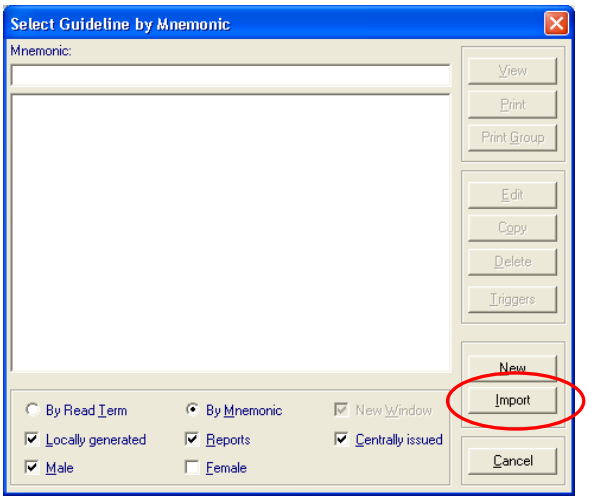
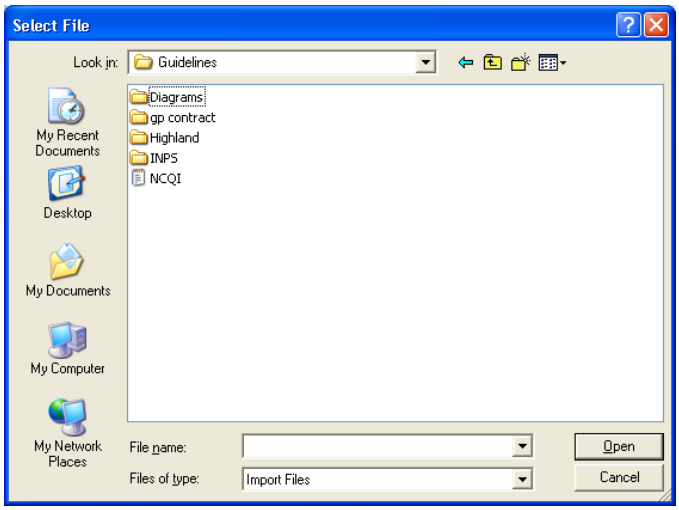
2. Importing the new guidelines into Vision



- In consultation manager
- Use the Guidelines menu to open the '**Select Guideline'** dialog.



- Click on Import

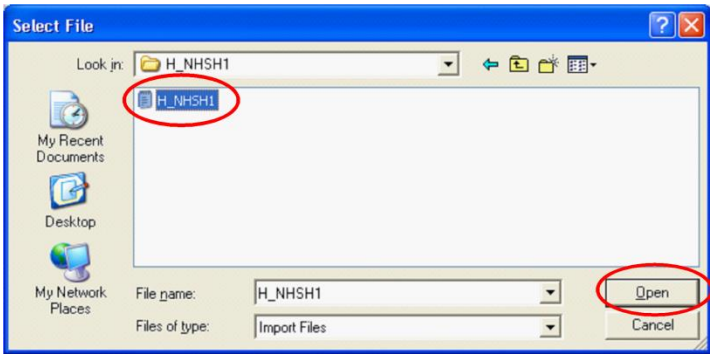


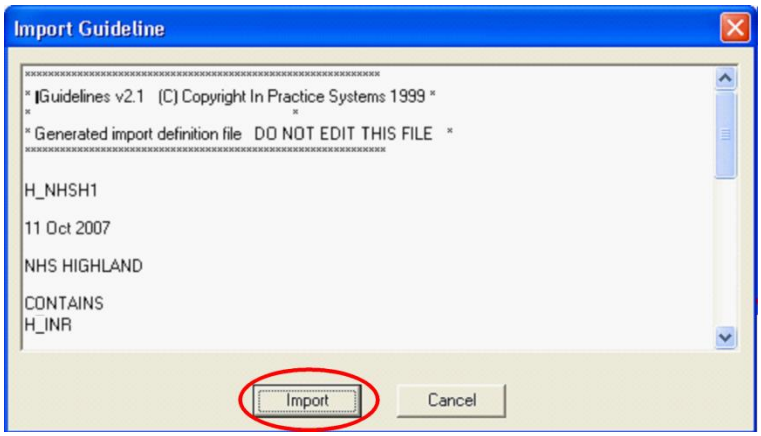
- Browse to the guideline in the Select File window:

This should open in the folder that was last used to import a guideline; the provider will tell you which file or folder to look for.

- Open the guideline.

  Double click on the file (or single click & click Open) to start the import.





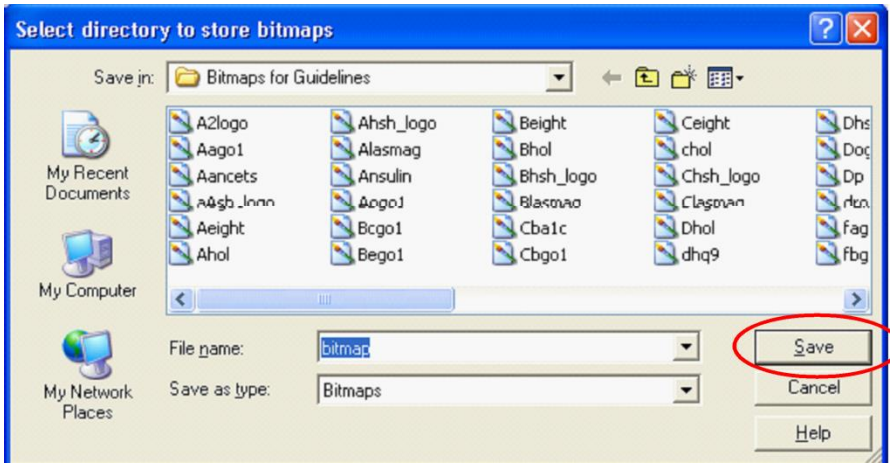
- Select Import

The Import Guideline dialog shows details of the selected guideline file. Click on Import to confirm you have selected the required file and import the guideline.

- You may be warned to store any images embedded in the guideline in the correct folder.

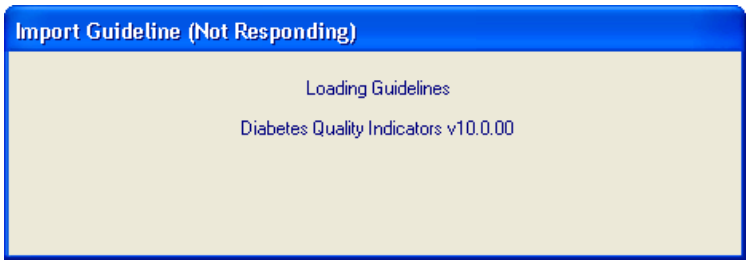


- Click OK to continue



Click on **'Save'** to save the bitmap images.

- The guideline(s) will then be installed, and the progress screen will show which guideline is being copied into Vision.



- When the import is complete, the guideline will open.

Note: The guideline is not included in any Index or other guideline at this stage

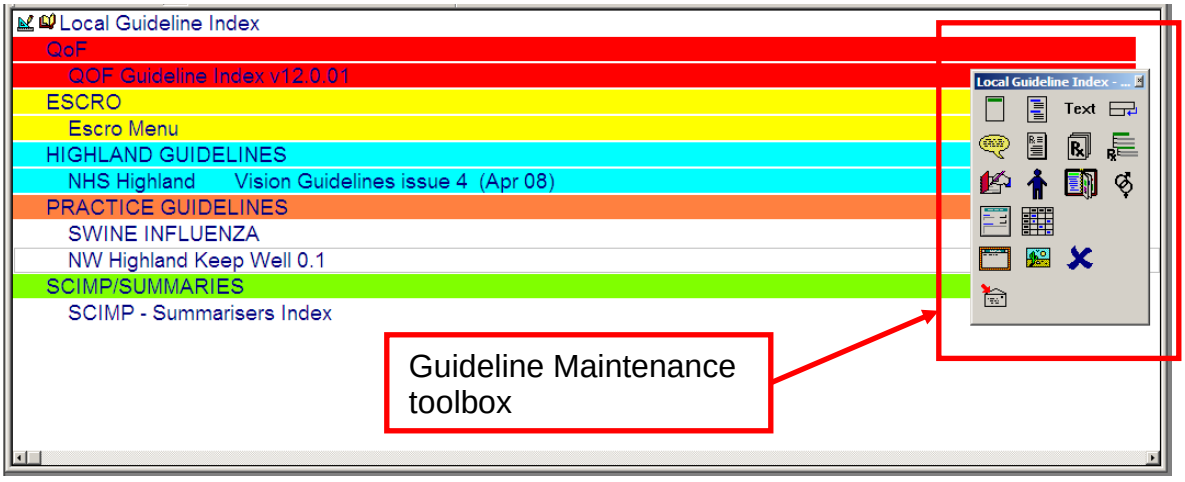
3. Add a Guideline to the Local Index

- In Vision Consultation Manager, click, on the Local Index button on the main toolbar.

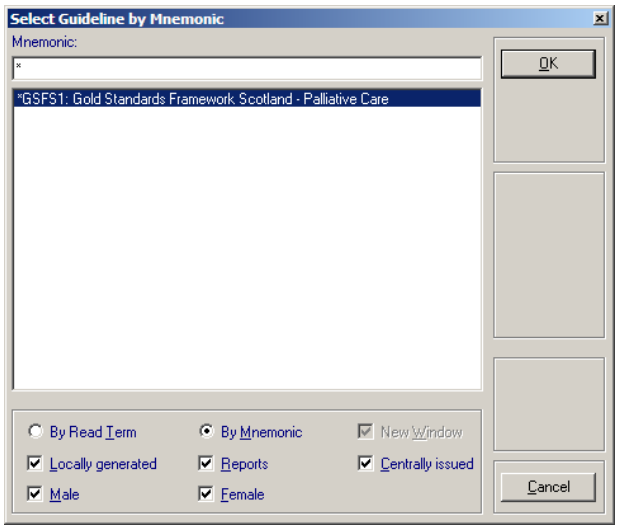


- Click on the Maintain button to start editing the index:
- The entries in the Index will expand and you will see the Guideline Maintenance toolbox.





- Click on the line that is above where you want to insert the new guideline, and then click on the insert guideline ( ) button in the toolbox.



- T

his opens the Select Guideline dialog, in the Mnemonic box at the top enter the first few characters of the Mnemonic of the guideline you wish to insert and the enter key. A list of matching guidelines will be retrieved.

Note:

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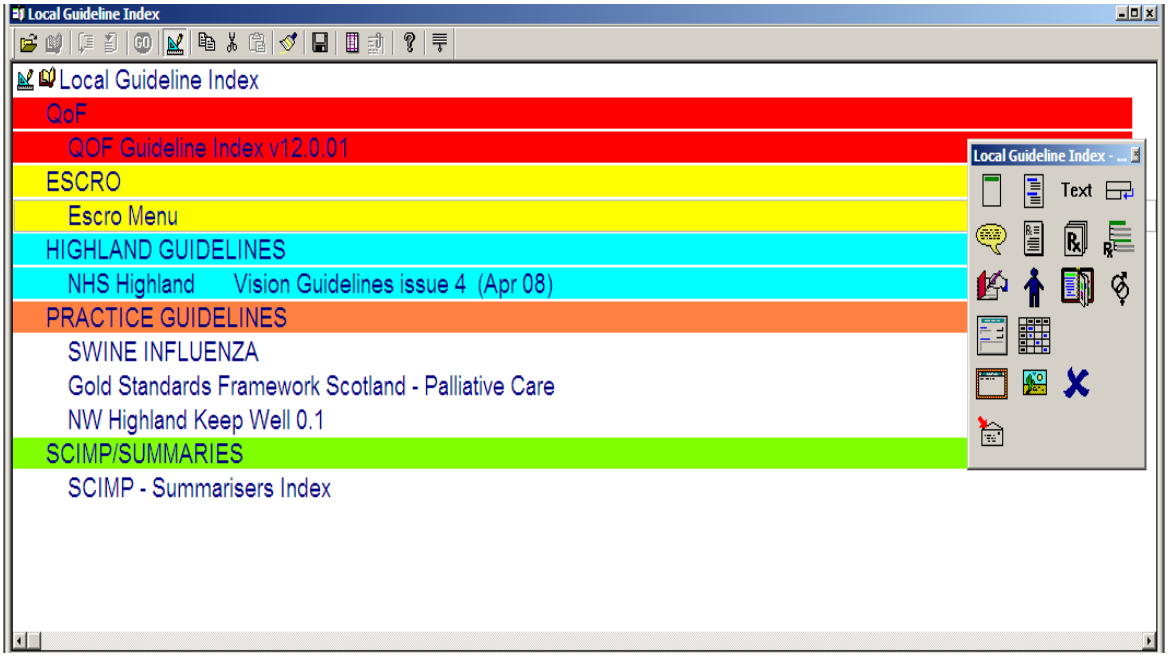
- Select the guideline by double clicking on it.

- The additional guideline is now on the menu, below the line you had previously clicked on:



- Click on the maintenance button again, this will put the index into “normal” mode. You can then open the added guideline by double clicking it.



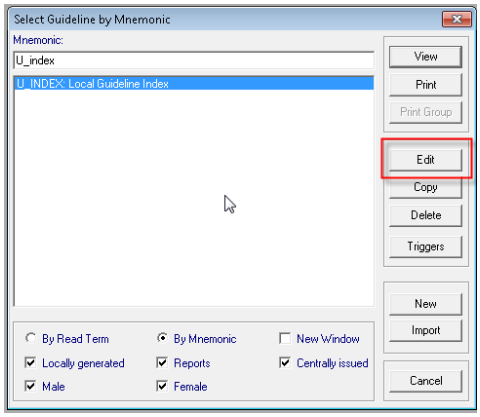
- Close the local index with the blinds button. 

- The index can be checked by starting a consultation for a patient and then opening a standard guidelines tab

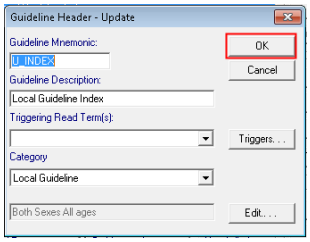
Appendix A: How to Remove a Guideline

Step 1: Remove the guideline from any indexes or other guidelines that contain it:

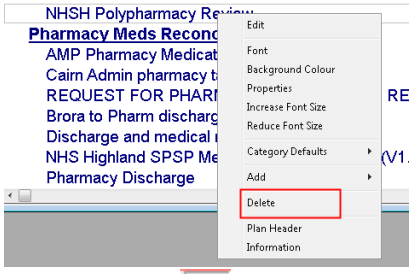
1. In Consultation Manager, open the guideline or index that contains the guideline that is being removed and select Edit:
   - Guideline (Menu)→ Select Guideline
   - Find the Guideline or Index and select Edit



   - Click OK to continue:



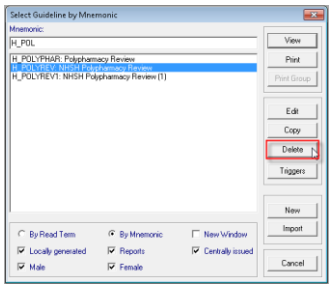
2. Select the guideline you are going to delete, Right Click on it and Delete:



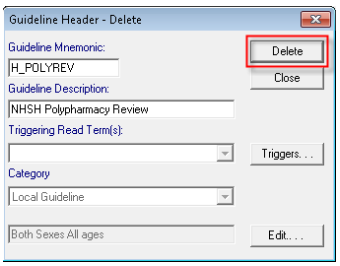
3. Click on the  Maintenance button to save and activate the guideline/index.
4. Close guideline/index screen 

Step 2: Delete the guideline being removed:

1. Guidelines → Select Guideline
2. Find the guideline being removed and select Delete.



Click Delete again to confirm:



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