Healthcare Improvement Scotland

# Setting Up and Importing Vision Guidelines

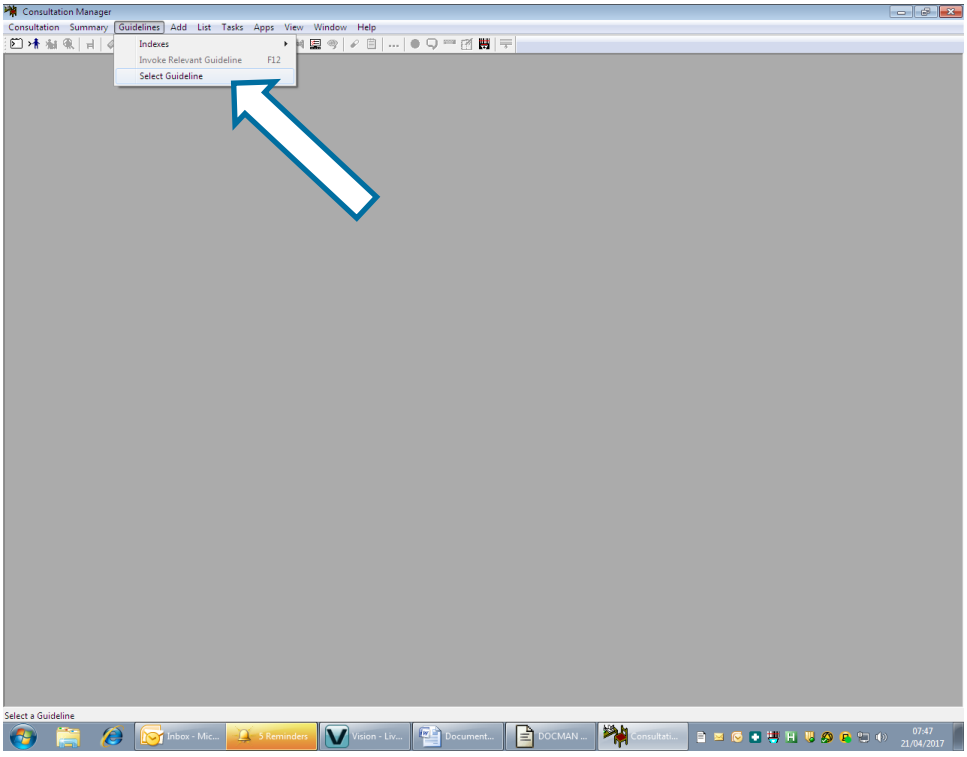
## Importing your Vision Guideline

1. Set up a new folder on the H or S Drive. Central server practices may have restricted permissions for saving this type of file to their H drive. If you receive an error message, please try saving it to your S drive (shared drive).

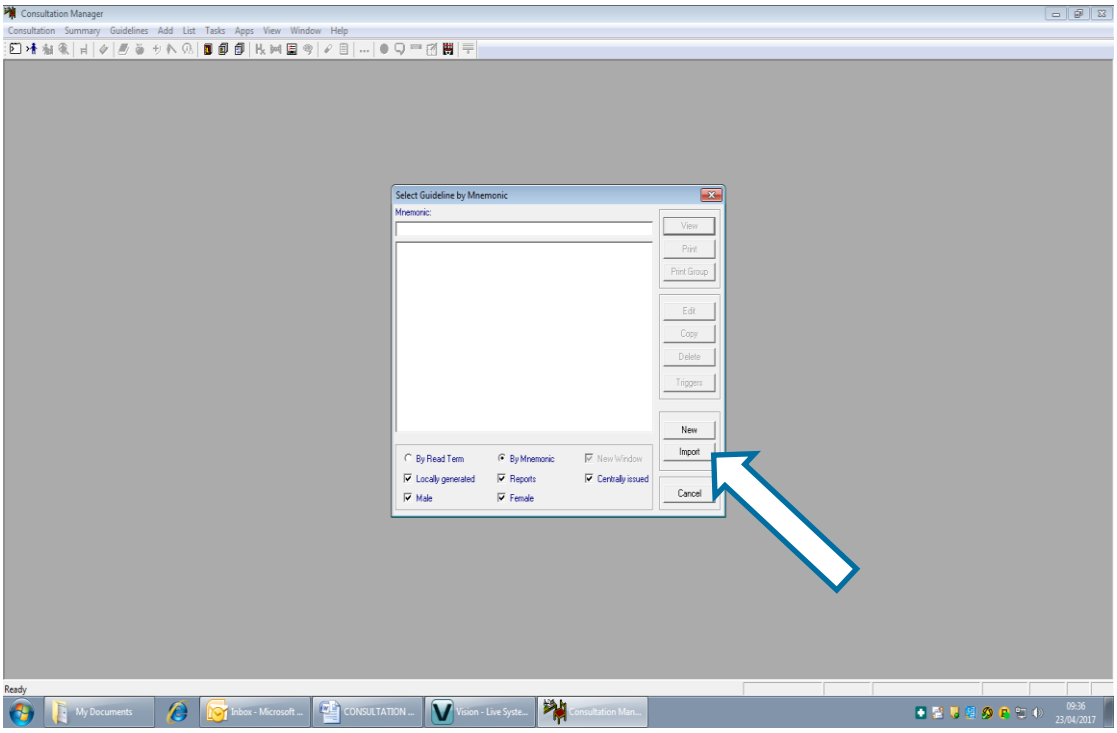
2. Save the attachments for the Guideline into the new folder that you have set up on the H or S Drive

3. Open up Consultation Manager within Vision

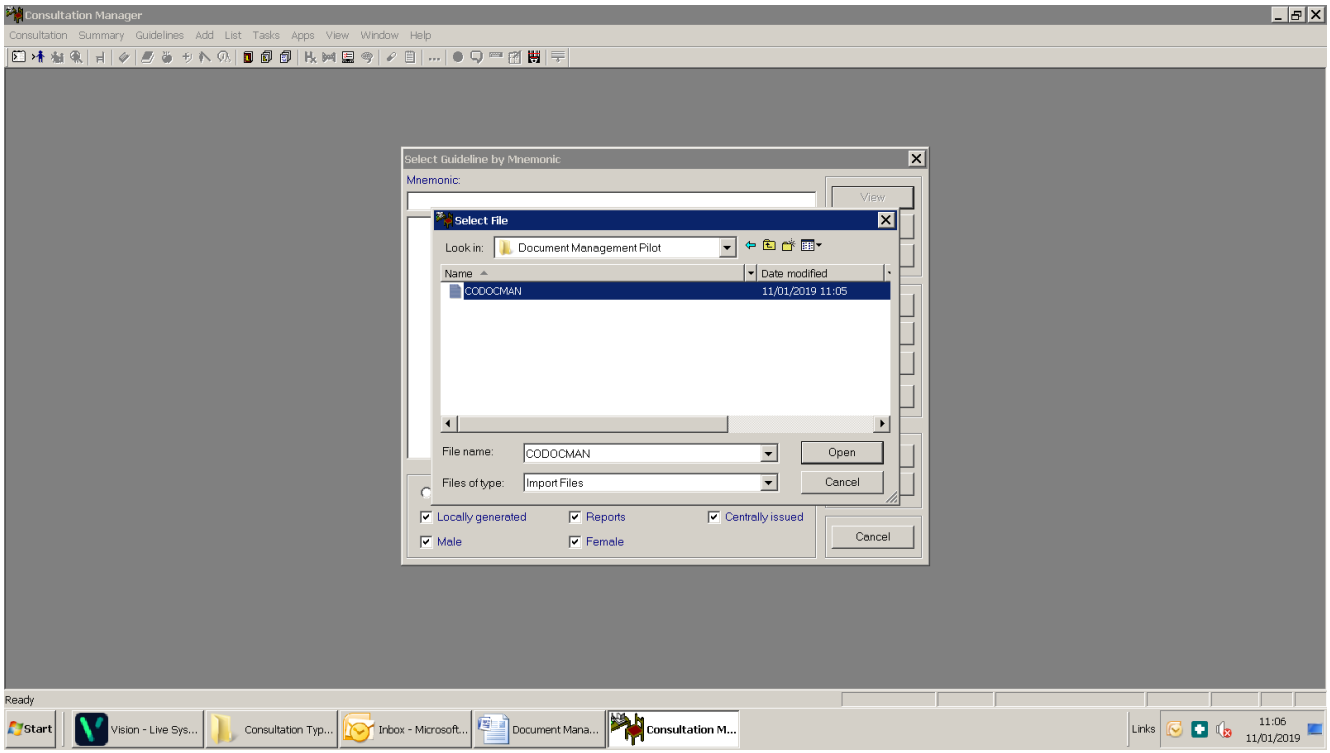
4. Select “Guideline” at the top of the toolbar, and then click on “Select Guideline”



**5.** Click on “Import”

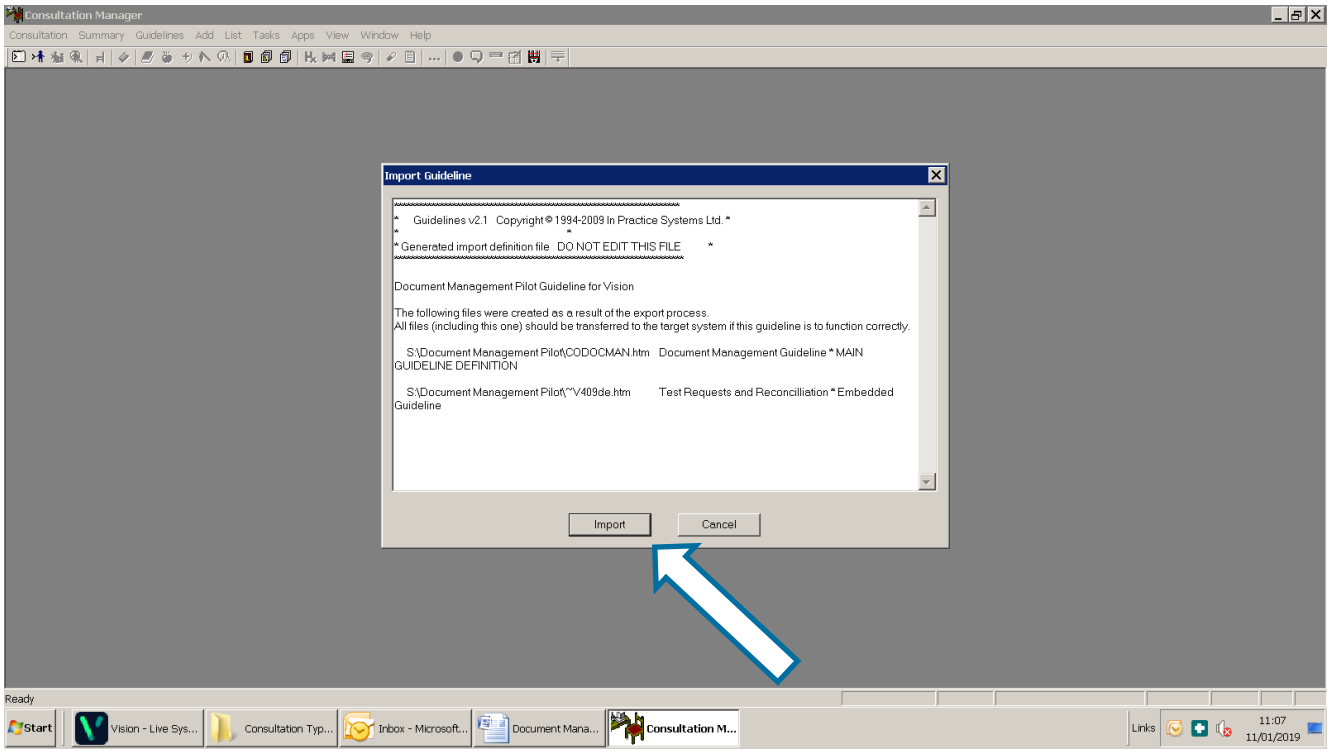



**6.** Browse to the folder that you have set up on the H or S Drive




**7.** Click on file CODOCMAN, and then “Open”

**8.** The pop-up box below will appear. Click on “Import”

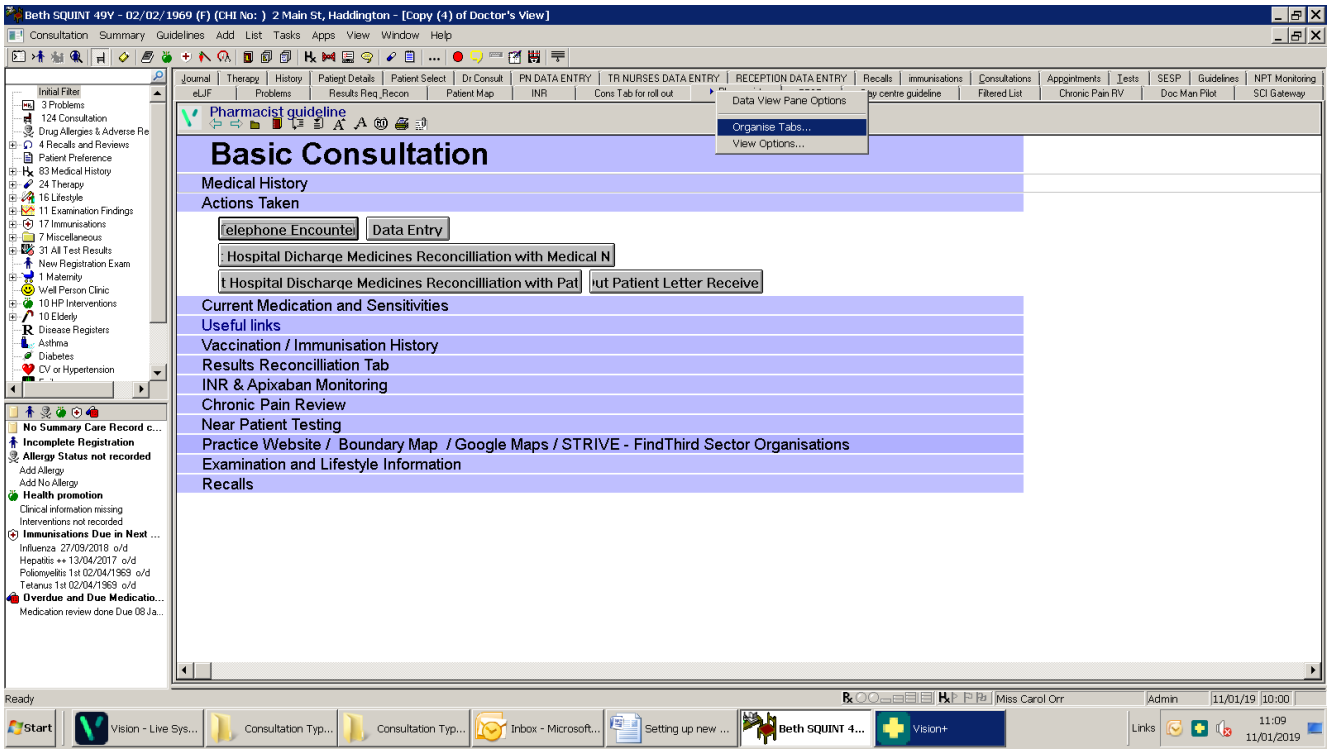


# Setting up a tab within Consultation Manager for your Guideline

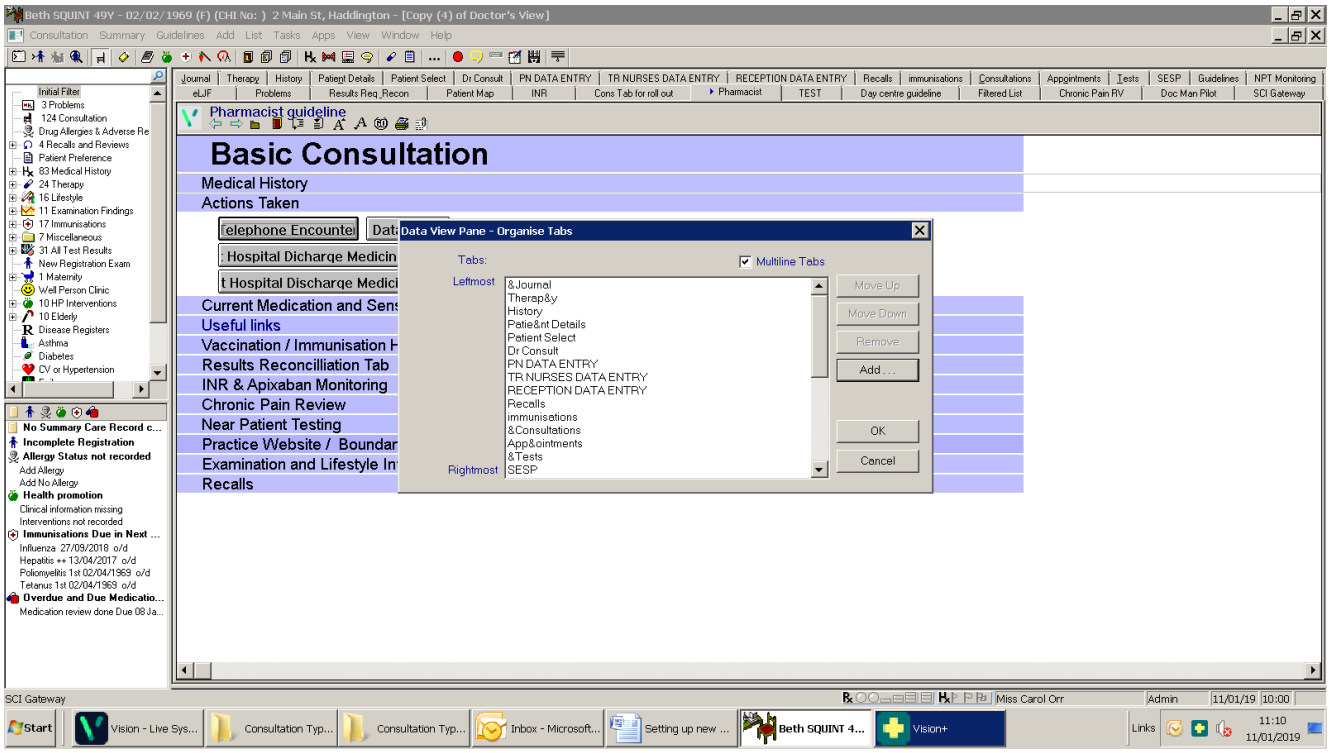
1. Open up Consultation Manager and open up the test patient on your system

2. Right click on any of the tabs within Consultation Manager and the pop up box below will show

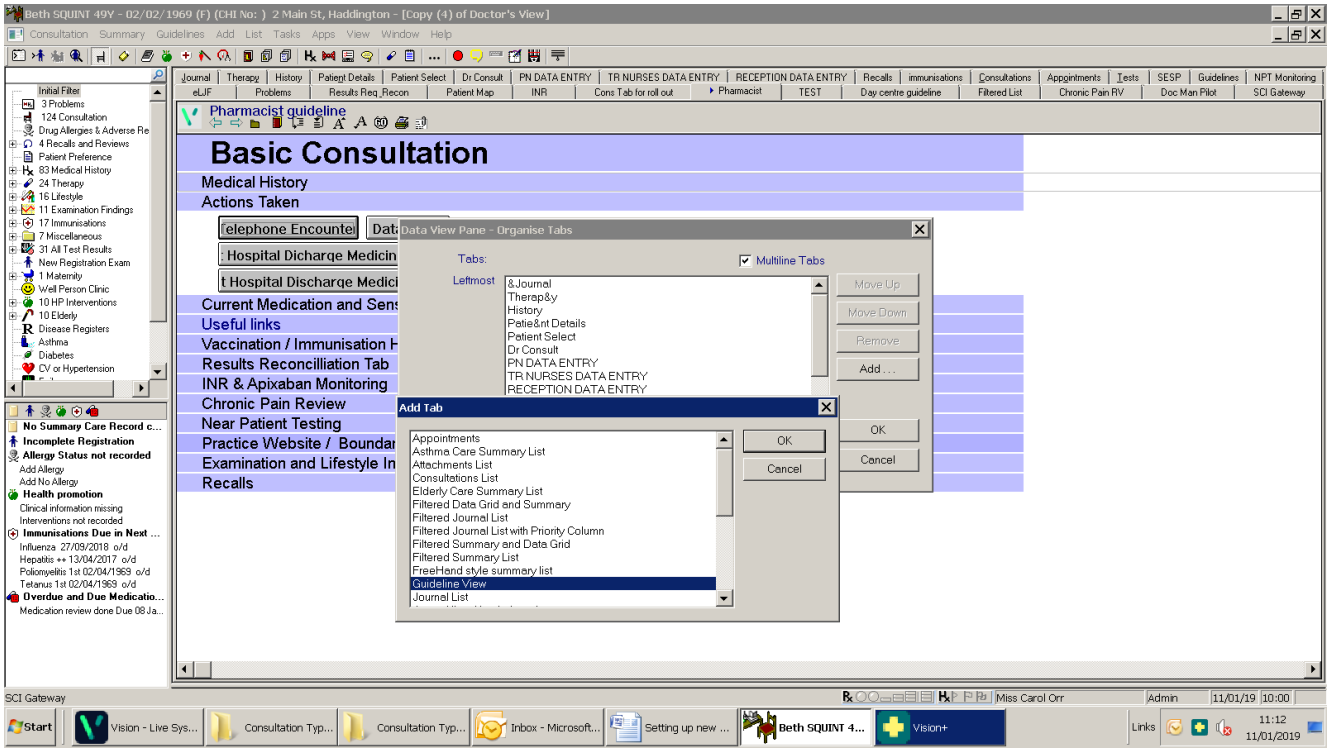
3. Select “Organise Tabs”



**4.** Click on “Add” on the right of the box

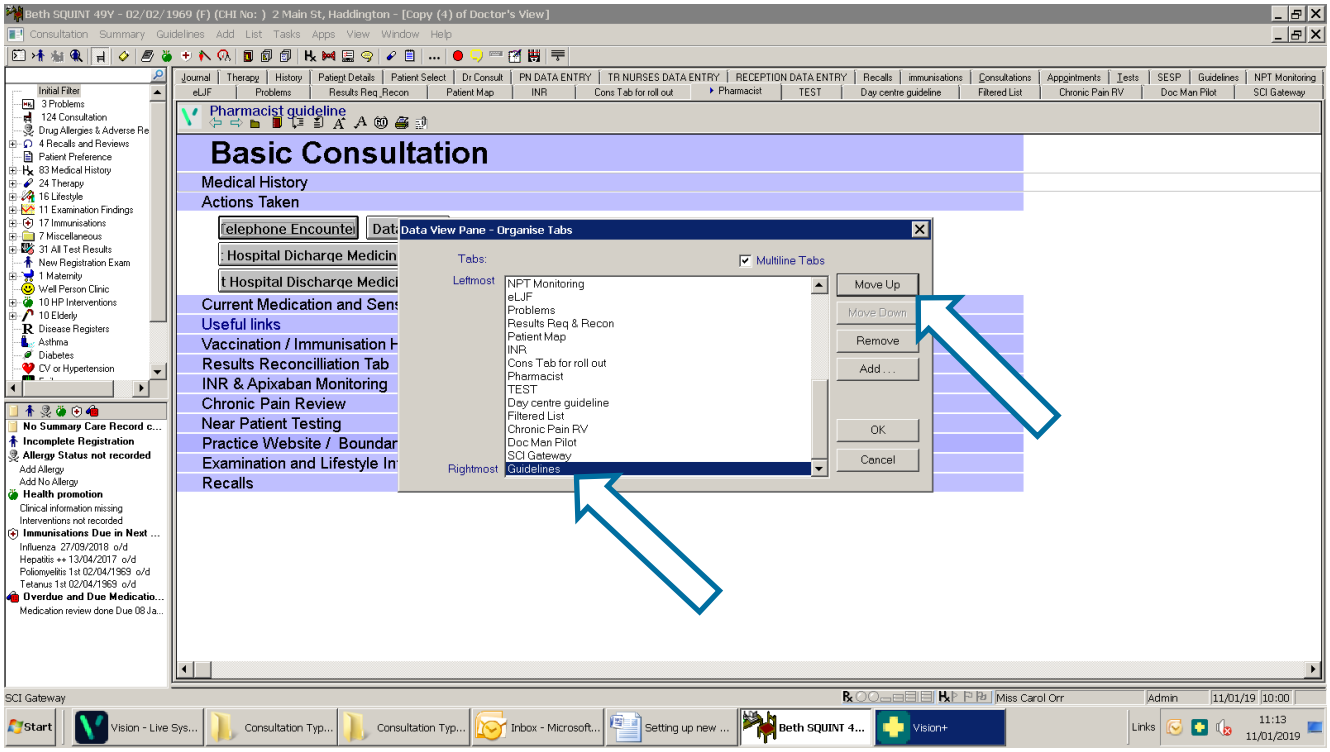



**5.** Then select “Guideline View” and click OK



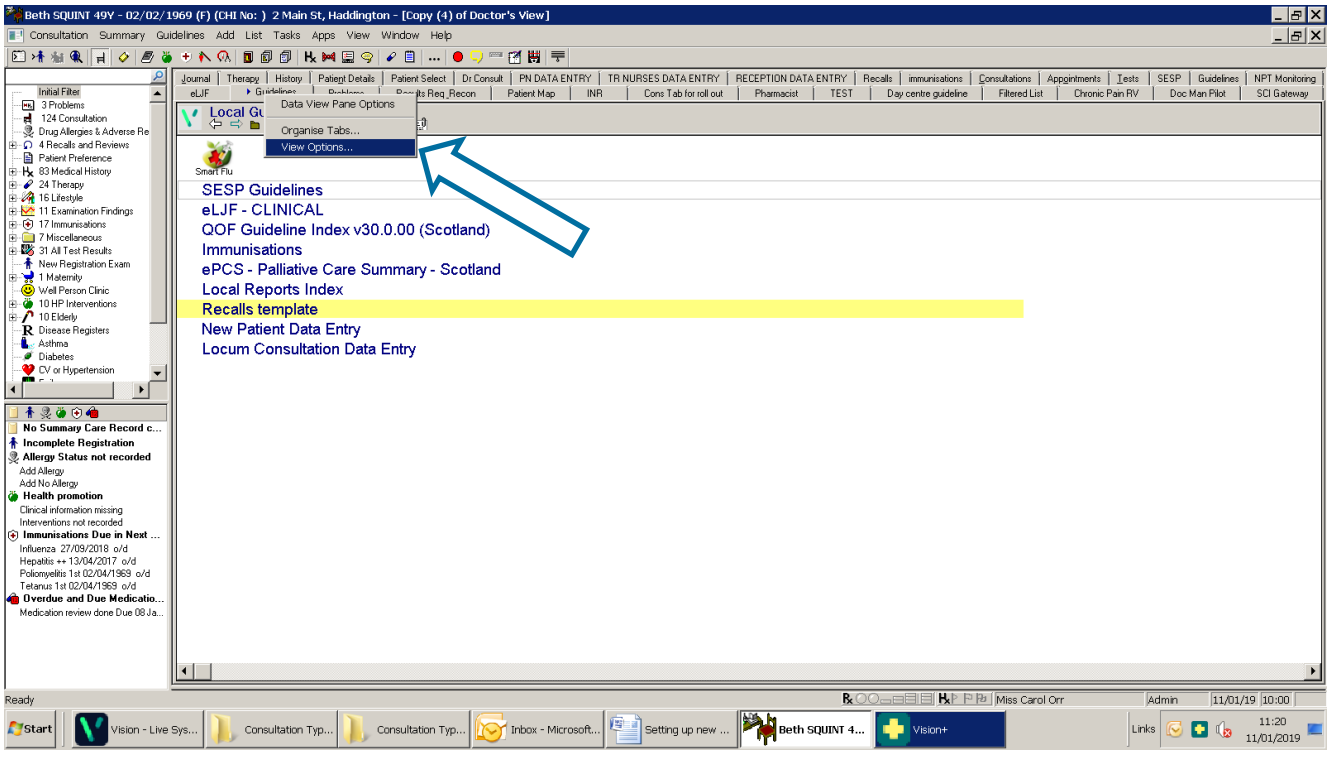

**6.** Scroll to the bottom of the “Data View Pane – Organise Tabs”. Guideline view will be at the bottom (you may have multiple ones if you already have these on the system).

VERY IMPORTANT – You must select “Guideline “and then click on “Move Up”. SCI Gateway should always be the last tab at the bottom of the list, or this may create problems with SCI Gateway.




When you have moved the guideline to the desired position on the list, click “OK”.

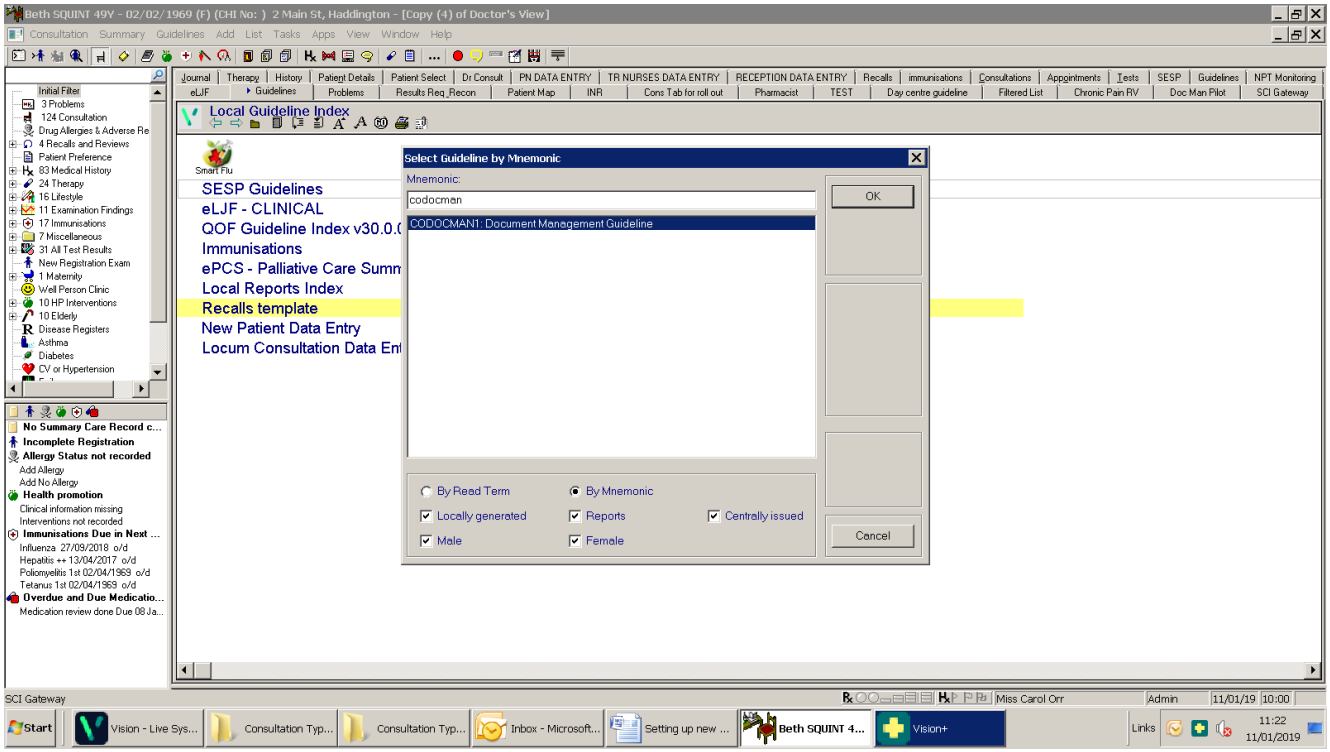
**7.** Find the “Guideline” tab in Consultation Manager (if there are multiple Guideline tabs just select one). Right click on this tab and the pop-up box below will show:




**8.** Click on “View Options” and a pop-up box will appear. This allows you to name and add the tab into Consultation Manager for the new Guideline.

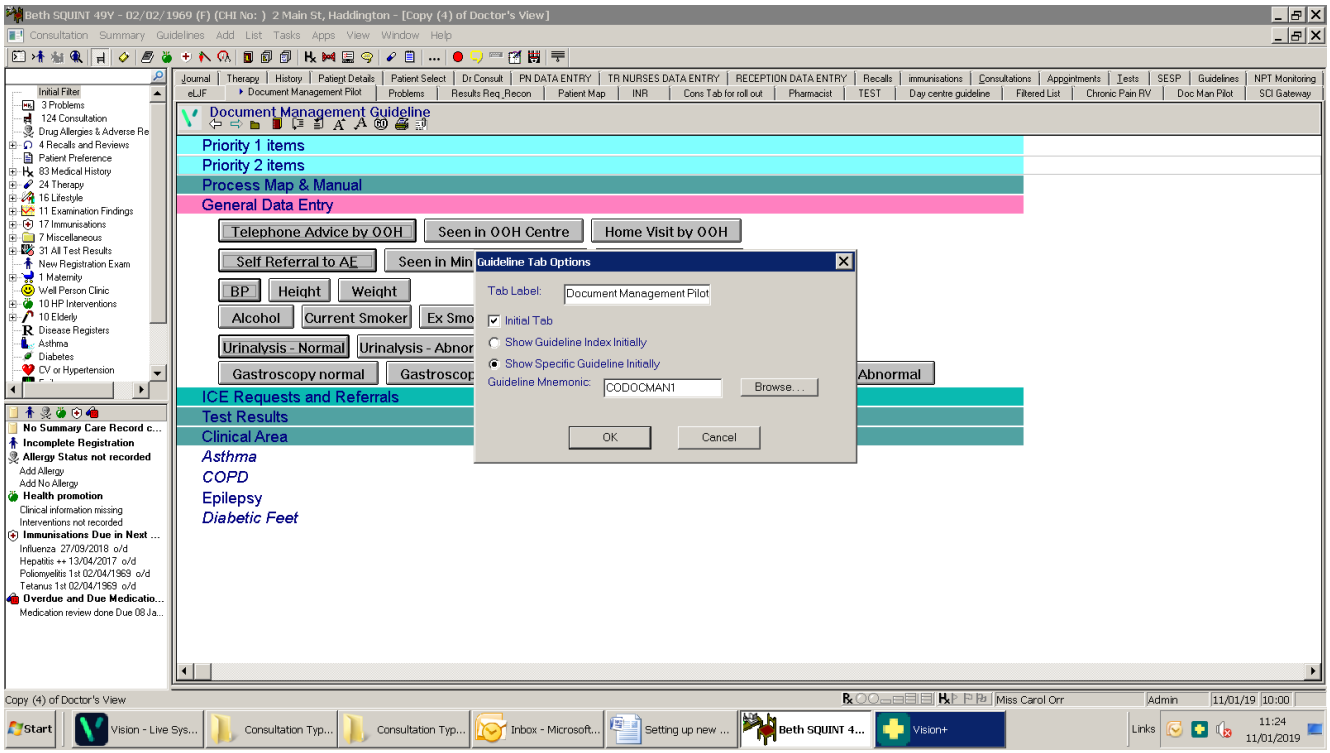
**9.** Select a name for your Tab Label (e.g. Document Management Pilot) and type this in the Tab Label box. Click on “Show Specific Guideline Initially” so that this option is selected, and click on “Browse”.

**10.** The box below will appear. Type in CODOCMAN into the Mnemonic box, and press the return key. Click and highlight CODOCMAN1 and select “OK”.




**11.** The Guideline has now been successfully imported, and will be available under the tab that you added.

**If you wish to make this the default tab within Consultation Manager, right click on the tab and select “View Options”, select “Initial Tab” and click “OK”.**



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