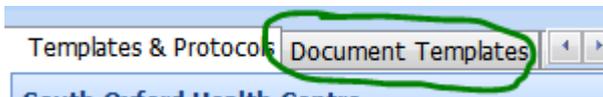




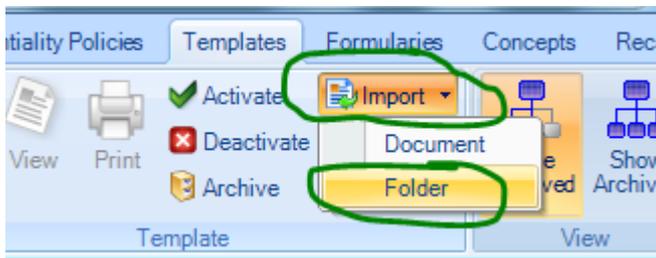
## Cleansing local proforma libraries

### Installing the up to date templates

1. Download the zipped file of the OCCG .ewdt proforma templates
2. Unzip the folder somewhere easy to locate, such as your Desktop, or perhaps a network folder
3. Go to Template Manager in EMIS Web (found under the EMIS Bubble under Configuration using the mouse, or keyboard shortcut: Alt - E - Z - L)
4. Choose the Document Templates tab on the left hand side of the screen



5. Click the name of your site, and create a Folder called OCCG
6. Click your new folder "OCCG" to make it your currently selected folder
7. In the Ribbon click Import, then Folder



8. Navigate to the folder of unzipped files you created in step 2 above and press OK
9. EMIS should import all of the files into a folder with the name OCCG Proformas YYYYMMDD

You will now have ALL the currently approved and up to date OCCG proformas.

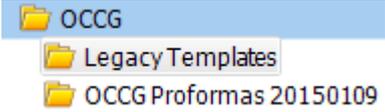
### Deactivating your previous versions

The next question is how to best 'spring clean' your existing templates (we call these legacy templates), removing the old ones that may be out of date or even decommissioned.

You won't want to 'lose' your existing ones because you will want to go back to them if you have problems with the new editions – I would put them all in one place for easy retrieval later.



Our suggested method for this is:

1. From within Template Manager, click your new OCCG folder (created above) to make it your currently selected folder
2. Create a new folder called Legacy Templates  

3. Go through your folders to find any of the county proformas. Most of the editions will have a date and version number on them which may make them a bit easier to spot
  - a. Cut and paste them to the Legacy Templates folder (you can cut and paste an entire folder at a time) so that you can find them again easily later on if necessary
4. Test one or two of the current editions to make sure they are working for you
5. When you are ready, click Legacy Templates and “Deactivate” to de-activate all your old ‘legacy’ templates en-masse. If you have problems, you can always re-activate the entire folder, or selected templates from within it

It will of course take time before the picking list of ‘recently used’ templates that appears when generating a new document will have the new templates in your system, and also your staff may be used to browsing folders to find templates

Both of these problems can be managed if staff are advised to use the Search function for templates and type in a keyword *instead* of manually browsing folders (or using the Recently Used Templates for a while). All of our templates should have keywords making them easy to find.

### Asking for help

We have been developing a “Users Guide” for EMIS Web sites describing how to navigate many of the common issues practices experience with Templates and your questions may be contained within the document.

For sites with major issues, please contact [OCCG.GPproformas@nhs.net](mailto:OCCG.GPproformas@nhs.net) where a member of the proforma team will be able to advice on a solution.