

# Manually Installing OCCG EMIS Web Software

## Sites using Template Manager (not Resource Publisher)

### EMIS Web Resource Publisher

If your practice is using Resource Publisher, do NOT follow these instructions. Contact [OCCG.datasets@nhs.net](mailto:OCCG.datasets@nhs.net) if unsure whether you have this software or have it correctly configured.

### Users profiles

The user performing this installation needs to have the RBAC Code B1700 “Local System Configuration” in their User profile. Read more about [how to edit users in EMIS here](#) (you will need your EMIS login to access the link).

### Step 1 – Getting the software ready for installation

OCCG software will be downloadable compressed into a Zip file usually with the letters SDK (software deployment kit) in the title e.g. “OCCG AKI EMIS Web SDK v1.0.zip”. The file should be saved to a folder of your choice, and unzipped before installation. If you aren’t used to unzipping files, you can read about how to do so [here](#).

### Step 2 – preparing the Concepts folder

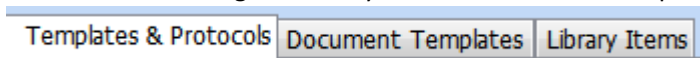
Nearly all OCCG practice sites should already have an OCCG folder. If you aren’t certain, follow this process before going to step 3:

- A. Access Concepts from the Configuration menu (Alt-E-Z-C)
- B. Select the root folder of the Concepts directory (usually titled by your practice name)
- C. Add a new folder called “OCCG Concepts” IF one does not already exist

### Step 3 – preparing the Library Items folder

Nearly all OCCG practice sites should already have an OCCG folder. If you aren’t certain, follow this process before going to step 4:

- A. Access Template Manager, from Configuration (Alt-E-Z-L, or click Templates in the main menu bar above the ribbon if you were in the Concepts module)
- B. In the left hand navigation bar, you will start on the “Templates & Protocols” tab:
 

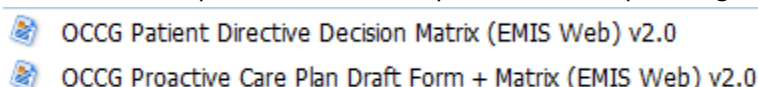

- C. Click on the Library Items tab (you may need to use the arrows to scroll right to find it)
- D. Select the root folder of the Library Items directory (usually titled by your practice name)
- E. Look for a folder called “OCCG” - if it does not already exist, create the folder

### Step 4 – installing Document templates

Not all software we produce will have documents, but these are the steps that you should follow if there are. You can spot them by their file type, which is .ewdt

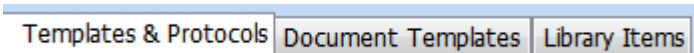
- A. From Template Manager, click Document Templates tab in the left hand navigation bar
- B. If you do not already have a folder called “OCCG” you should create one by selecting the root folder of the directory (as in step 2) and create a new folder called “OCCG” for your documents
- C. Click to Select the OCCG folder which will then be highlighted
- D. Click ‘Import’ from the Ribbon

- E. When prompted, select 'Import Folder' and navigate to the folder you unzipped your files to. The installer should upload a series of templates and end up looking a little like this



## Step 4 - Installing Data Entry Templates and Protocols

- A. In the left hand navigation bar, click the "Templates & Protocols" tab:



- B. Select the root folder of the Library Items directory (usually titled by your practice name)  
 C. Look for a folder called "OCCG" - If it does not exist, create one  
 D. If you have an OCCG folder, you may already have previous versions of the software in your folder. Double check the "Activation" instructions for the module you are installing, which will tell you exactly which components you are about to install. If you have any previous versions, you must ARCHIVE them prior to importing the new versions. If you set up your own triggers, you'll need to make a note of them and add those triggers back to the new version.  
 E. Select the OCCG folder and click 'Import' from the Ribbon  
 F. When prompted, browse to the folder where you saved your installation files, and import the protocols which will be files ending with .xml e.g.
- OCCG AKI.xml
  - OCCG eFI Popups.xml

Each protocol needs to be installed separately one at a time. During each installation you may be prompted to choose where to store the attached Concepts or Library Items – select the OCCG folders that you prepared in the Steps above. EMIS may warn you that there is already a copy of the Concept or Library Item present – **this is normal** and not a problem. If asked to, simply over-write the item

If EMIS warns that it cannot over-write the Concepts because they have the same name as an existing concept, you will need to cancel the importation, click "Concepts" in the menu above the Ribbon, find the relevant Concept and Archive it, before attempting to import the Protocol again

## Step 5 – Setting up Triggers for the software

Your Data Entry Templates and Protocols can now be triggered manually (and will show up in searches) but won't pop up unless they have triggers installed.

All OCCG software will have different triggers – refer to the Activation Instructions for the software included in the Software Deployment Kit zip file for the specific software.

## Step 6 – Installing the Searches

Searches and Reports should appear in your EMIS Population Reporting module via the EMIS Enterprise stream from the OCCG/SCW. Details of any Searches or Reports will be in the Cover Sheet that came with this document, and in the Activation Instructions document

## Troubleshooting

You can call on three sets of teams to help you with any import problems:

EMIS Health 0330 0241 270

The South Central & West Training Team on 0300 123 5678 [training.scwcsu@nhs.net](mailto:training.scwcsu@nhs.net)

The OCCG Datasets team may be able to offer limited installation support – email [OCCG.Datasets@nhs.net](mailto:OCCG.Datasets@nhs.net) (N.B. all bugs or suspected bugs in our software should come to the Datasets email)