

Manual Activation of OCCG EMIS Web Software

Module Name: OCCG Primary Care Services Template

Sites using Template Manager (not Resource Publisher)

This software module includes

	Names
✓ Data Entry Templates	Primary Care Commissioned Services
✗ Document Templates	
✗ Protocols driving static popups (QOF style)	
✓ Protocols driving popup messages	OCCG Low TTR Review Needed Protocol Alert
✗ Protocols driving interactive menus	

EMIS Web Resource Publisher

Until Resource Publisher is fully deployed and we can stream software to you all, you may be asked to manually install resources such as Data Entry Templates and EMIS Protocols developed by the OCCG.

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](#).

Ignoring the warnings (!? Yes really)

When you install this software, you are likely to be given several warnings by EMIS. **Each of these warnings can be safely overridden.**

Specifically, when we use a Concept that is already in EMIS (either because it is an EMIS Library Concept, or an OCCG concept that you already have from a previous OCCG installation), EMIS will warn you that the concept will be overwritten. Don't worry – EMIS will not overwrite its own concepts, nothing will be broken. Any previous OCCG concepts will be up to date if you are using an official OCCG software deployment kit, so overwriting them is the correct action, as they may have changed and need to be updated.

In addition, we try to build our software with consistent components – sometimes you will find that a part of the module can be called twice in the resource e.g. a protocol may call a template through two different routes. When that happens, you may get this error message:



This warning is also fine – click OK. EMIS is just pointing out that they look the same, so the first description in the resource will be used (they are all the same so there is no problem).

Step 1 – Install the software

Please refer to the separate installation guide before Activation

Step 2 – Activating Data Entry Templates

General information



Templates have this icon in EMIS Web

If you overwrote a previous Data Entry Template with the same name during your installation (e.g. for an updated template), the Triggers should have remained the same. You can inspect the Triggers by clicking on the Data Entry Template and clicking Triggers:

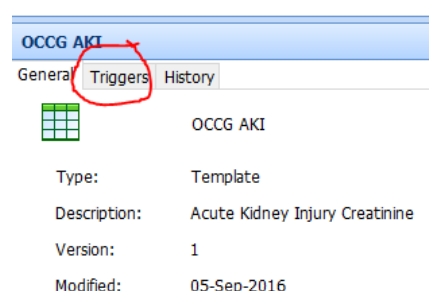


Figure 1 example of the Triggers tab on an OCCG template

Specific instructions for the data entry templates in this module

For the time being, we suggest NOT setting up Triggers for the data entry template, but we are very interested in what triggers you think should be put on – email us!

If you have been using your own data entry templates or EMIS templates for this area, you may wish to deactivate them.

The list of templates we recommend you deactivate that may conflict with this template are:

**Any template we previously released for Primary Care Services e.g. P3 Primary Care Services NR4
Primary Care Services NR5 Primary Care Services etc – suggest searching for this text**

General information



Protocols for static popups (Protocol Alerts) and popup messages have this icon in EMIS Web

If you overwrote a previous Protocol with the same name during your installation (e.g. for an updated template), the Triggers should have remained the same. You can inspect the Triggers by clicking on the Protocol and clicking Triggers:

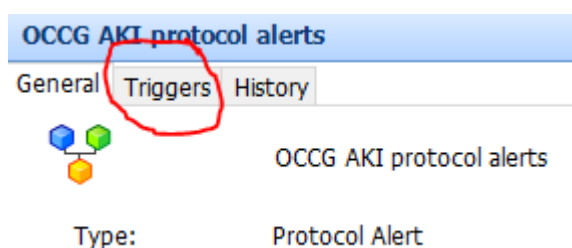
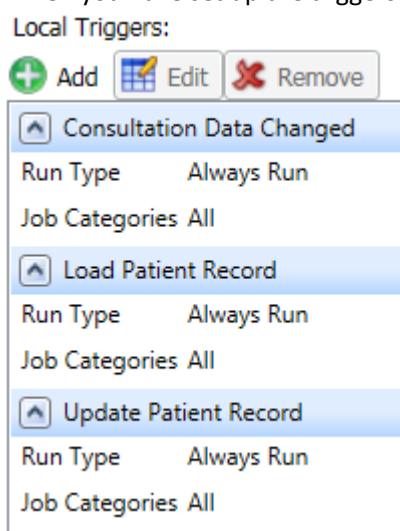


Figure 2 example of the Triggers tab on an OCCG protocol alert

Specific instructions for the Protocols in this module

- i. Protocol Name: **OCCG Low TTR Review Needed Protocol Alert**
 - a. Click on the protocol you are Activating, and click “Properties” from the Ribbon
 - b. Click Triggers to open the Triggers tab
 - c. If you have already had a version of the data entry template installed, you may find that your Triggers are already set up – check them against the image below in and only add new triggers if you need to
 - d. Click Add then choosing a System Trigger with Run Type Always Run and click OK each time to save the trigger and add the next one
 - i. Load Patient Record
 - ii. Consultation Data Changed
 - iii. Update Patient Record
 - iv. When you have set up the triggers appropriately, it should look like this:



If you have been using your own protocols or EMIS protocols for this area, you may wish to deactivate them.

The list of protocols we recommend you deactivate that may conflict with this template are:

None – please tell us if you know of any

Troubleshooting

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

EMIS Health 0330 0241 270

The CSU Training Team on 0300 123 567 Training.SCWCSU@nhs.net

The OCCG Datasets team may be able to offer limited installation support – email OCCG.Datasets@nhs.net (n.b. all bugs or suspected bugs in our software should come to the Datasets email)