

# *Training Manual*

EMIS Web

Importing and Archiving Referral Documents

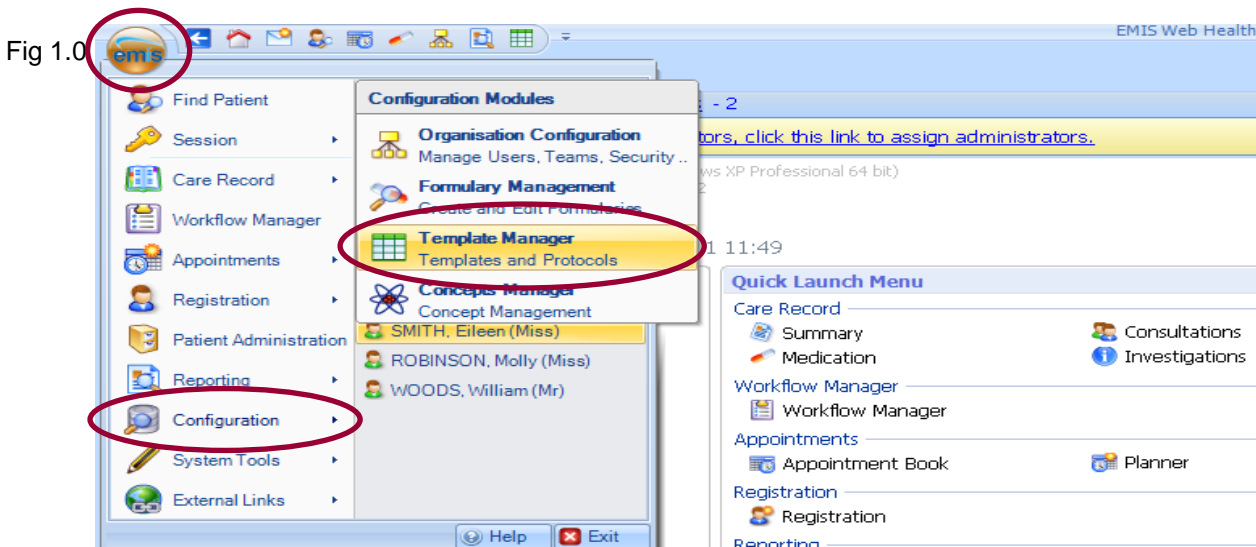
## Introduction

This guide will show users how to access the management of referral documents and Import (add) new documents and Archive documents no longer required

## Managing Referral Proformas

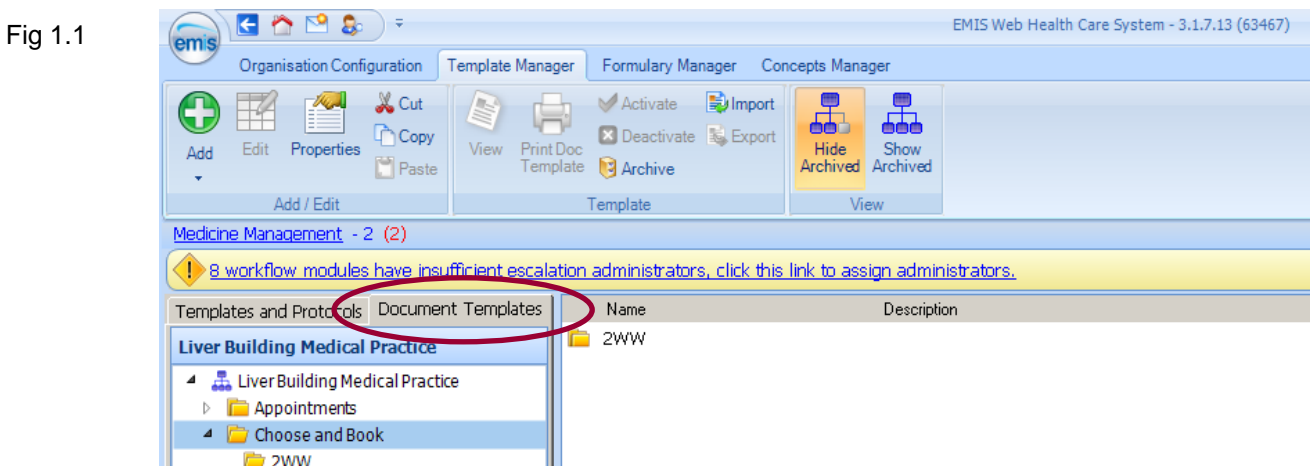
From the Home page in EMIS Web

- Left click the EMIS Button
- Hover the mouse over 'Configuration'
- Left click 'Template Manager' (See fig 1.0 below)



The next screen you see is the Template Manager page

- Click on Document Templates Tab (see fig 1.1 below)



You should have the following folders set up in Document Templates:

- Main folder – 'Choose and Book'
- Sub folders within the Choose and Book main folder: - 2WW

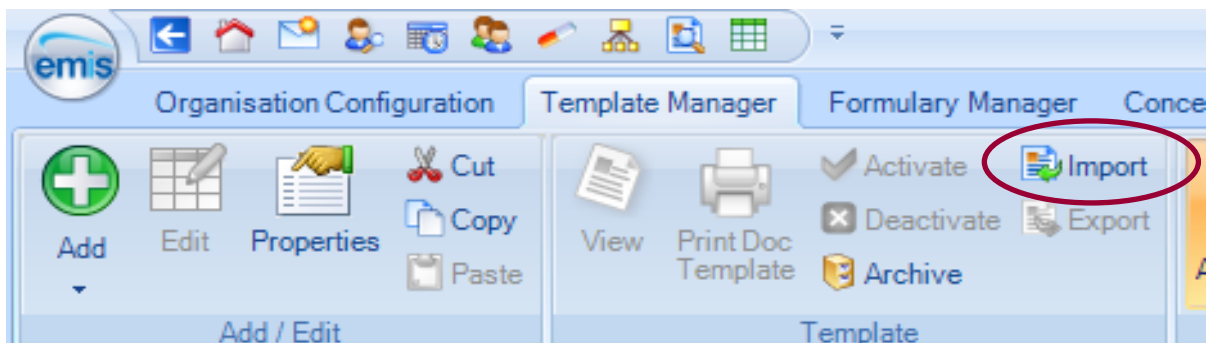
## Adding (Importing) New Referral Documents

You will receive an email with the new forms attached, you will need to save the forms to another location prior to importing (e.g. desktop) to do this right click on the attachment in your email and select 'save as' then choose your location to save to, do not rename the document it will automatically bring the name and version with it. Once this has been done you can import to EMIS WEB

From the Home page in EMIS Web

- Left click the EMIS Globe
- Hover the mouse over 'Configuration'
- Left click 'Template Manager'
- Click on 'Document Templates' Tab
- Left click on the folder you want to import the document to (Choose and Book or 2WW), so it is highlighted
- Then click on 'Import' on the ribbon (see figure 1.2 below)

Fig 1.2



- You now need to navigate to the location that you saved the attachment from the email to (e.g. desktop)
- When located left click on the item once so it is highlighted
- Click Open
- The document will now be imported to the folder you selected

NB: the first one you do is usually quite slow but after the first it will speed up

**If you wish to rename the folder to update the month year – right click on the folder and select properties**

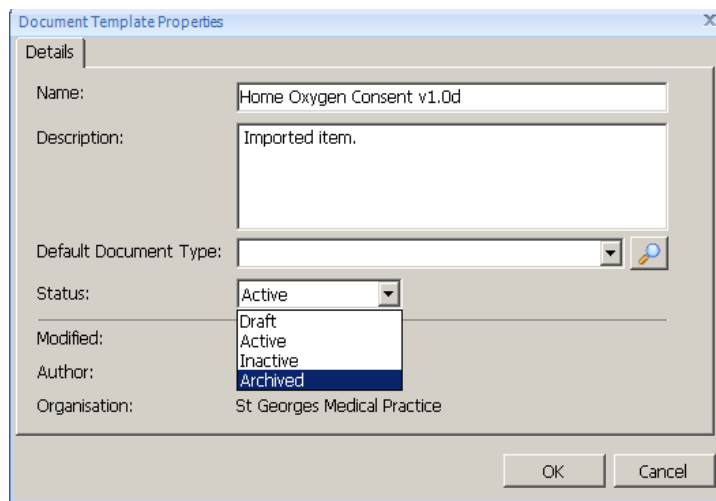
## Archiving Forms No Longer Required

To remove forms no longer required in EMIS WEB you need to archive them.

From the Home page in EMIS Web

- Left click the EMIS Globe
- Hover the mouse over 'Configuration'
- Left click 'Template Manager'
- Click on 'Document Templates' Tab
- Left click once on the folder you want to Archive a document from, so it is highlighted
- The documents are displayed to the left of the screen
- Right click the documents that is no longer to be used
- Left click 'properties' from the menu that is displayed
- Left click on the down arrow of 'Status' and select 'Archived' (see fig 1.3 below)

Fig 1.3



- Left click OK

The documents has now been archived