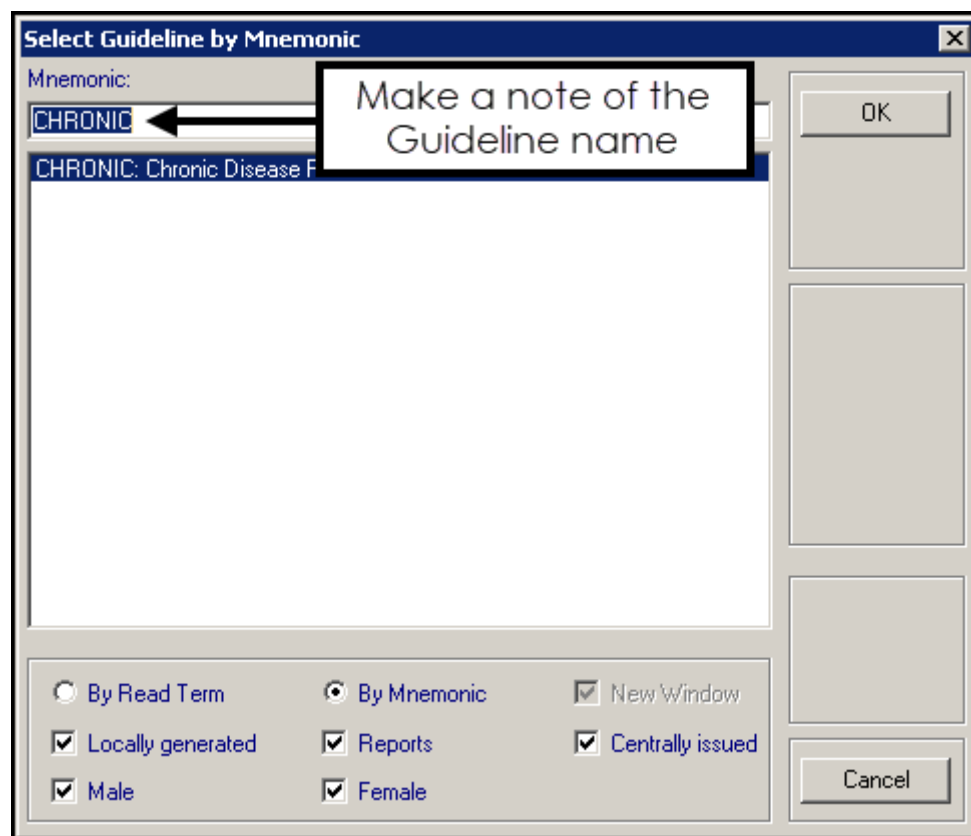# Amending a Guideline

To amend a Guideline, you must know its **Mnemonic** (short name). If you do not know what it is called:

1. From the **Consultation Manager** toolbar, select **Local Guideline Index** .

2. From the **Local Guideline Index** screen, select **Maintain** , to switch into design mode.

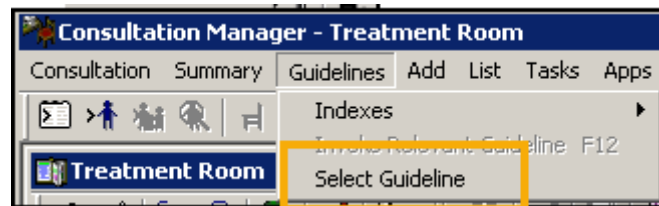3. Right click on the **Guideline** you want to amend, select **Edit** and make a note of the name:

4. Now, select **Cancel** to close the **Guideline** and select **Maintain** to come out of design mode.

Amending a Guideline

To amend a patient data line and change the properties:

> ➡ See **Floating Design Toolbar** on page **5** **for more information on the other options available.**
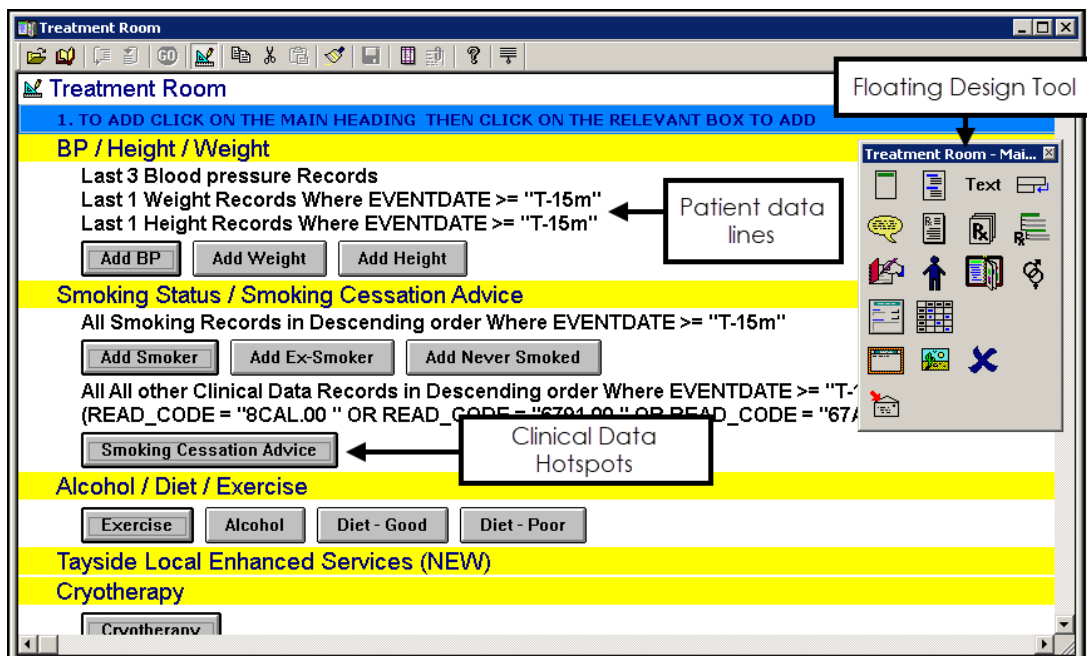
1. From **Consultation Manager**, select a test patient.

2. From the **Consultation Manager** toolbar select **Guidelines** - **Select Guideline**:

3. Enter the name of your guideline in **Mnemonic** and select **View**
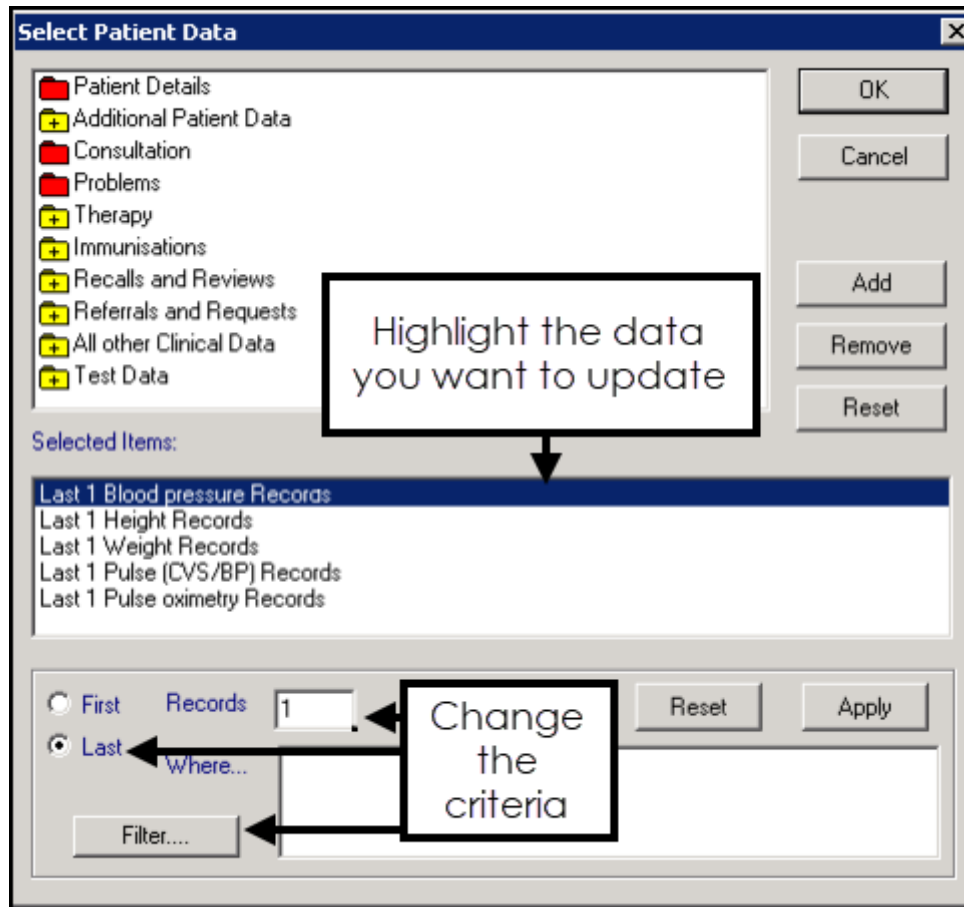.

4. The guideline displays as if you were going to review, or add data. To update the guideline you must be in design mode, select **Maintain** .

5. The guideline displays in design mode with the floating design tool:

To change patient data, for example, to display the last three Blood Pressure records (instead of the last one Blood Pressure). Right click on the appropriate row and select **Edit**.

6. The **Select Patient Data** screen displays, highlight the data type to update and then change the criteria as required, for example, replace '*1*' with '3' in **Records** | Records 3 | :

Highlight the data you want to update

Change the criteria

💡 **Training Tip** - By selecting Filter, you can further refine the data that displays, for example, you can enter a date range.
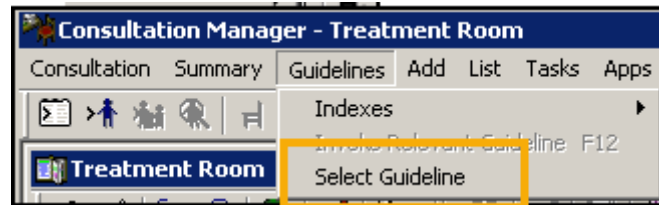
7. Select **Apply**.
8. Select **OK** to save.

You should now check that the data displays in the way you require. To do this, select **Maintain** 📝 to come out of design mode, any changes since your last save automatically save at this point, and view the data in the Guideline.
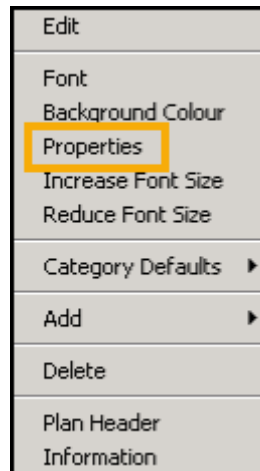
Properties

You may want to update how the qualifying data displays in your Guideline, for example, you may want data to display directly under a heading without having to expand it first.

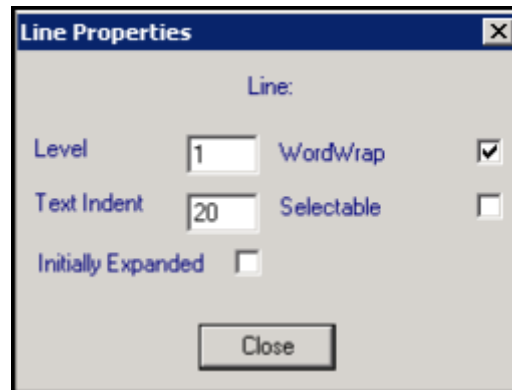To update the properties of a specific line within a Guideline:

1. From the **Consultation Manager** toolbar select **Guidelines** - **Select Guideline**:

2. Enter the name of your guideline in **Mnemonic** and select **View** .

3. The guideline displays as if you were going to review, or add data. To update the guideline you must be in design mode, select **Maintain** .

4. Right click on the line you want to amend and select **Properties**:

5. The **Line Properties** screen displays:

Complete as follows:

- **Level** - Specifies the style of the data, for example, 1 is a heading, 2 is a data line

- **Text Indent** - Indicates the position of the data on the line, the higher the number the further to the right it displays.

- **Initially Expanded** - Tick to display this data type without selecting the heading first.

- **WordWrap** - Tick to display data over multiple lines if it is longer than one line long.

- **Selectable** - Tick to make the line actionable, instead of expanding or collapsing, the triggers an action such as printing.

6. After making the line property changes, select **Close**.

7. Select **Maintain** to save the changes and exit design mode.

Floating Design Toolbar

When you select **Guideline Maintenance Mode** the floating design toolbar displays:

Hover over an option to display the function tooltip, the options are:

- **Plan Header Update**

- **Add Subheading**

- **Go to New Line**

- **Patient Advice**

- **Drug Information**

- **Drug Regime**

- **Drug class**

- **READ term**

- **Patient Data**

- **Embed Guideline**

- **Age/Sex Filter**

- **Clinical Data Hotspot**

- **Patient Data Grid**

- **Launch an external Application**

- **Image**

- **Delete**

- **Export a guideline**

To move the toolbar to a new position on the screen, simply drag and drop it.

Selecting an icon on the floating toolbar adds the selected item after the currently highlighted line.

You can also select a floating toolbar icon and drag it across to where you want it in the report, it inserts before the line you dropped it on.