

## MEDVIEWER – CREATE A COLLECTION

Collections are groups of Pages and/or whole Bundles that you need to pull together for a particular task or set of tasks. These might include:

- a Multidisciplinary Review
- an Audit
- for Research

Collections can be put together by all users of the system. Compile them for one-off use or save them against your login, until you decide to delete a Collection. Deleting collections never deletes any Pages or Bundles.

On first entering the patient's Health Record...

The **Bundles View** displays:

A Ribbon icon appears in the top-right of the Pages View.



Click on the **Ribbon** icon, top-right of the Pages View



The **Saved Collections** block displays:

No collections to display

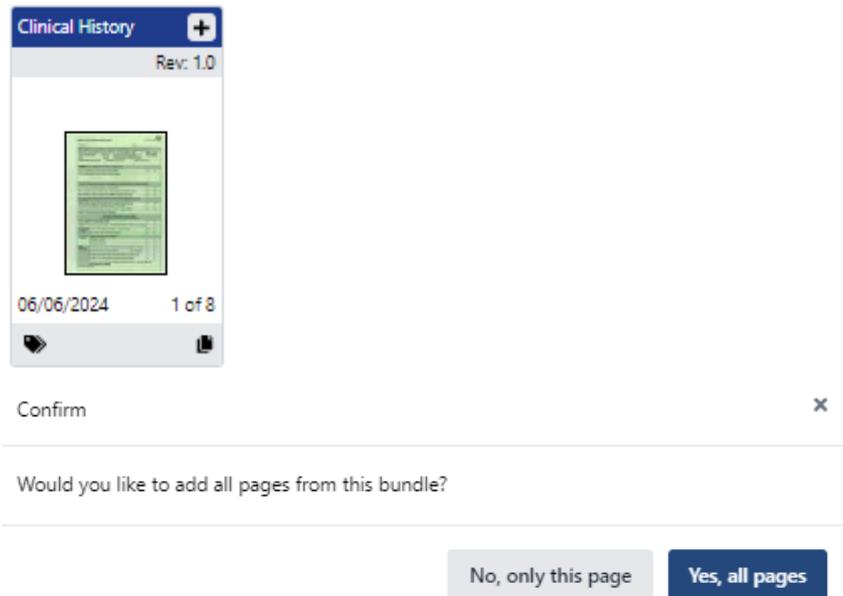
Create new collection

Click on the **Create New Collection** button, below any Saved Collections

The **Collection View** displays as a side bar - An additional Ribbon icon appears, this time in the top-right of the Collection View.

**Please Note:** If you are also using the main Health Record Filters to reduce your results, and select a page via the Previous and Next Arrows in Page View or the Thumbnails View, which is NOT a direct result of the filter, you will not be able to get to a + icon in the Bundles View until you close the blue Filter bar.

To add Pages to your Collection View, click on the + icon at the top-right of every Page (or Bundle if you want to add the whole Bundle to the collection

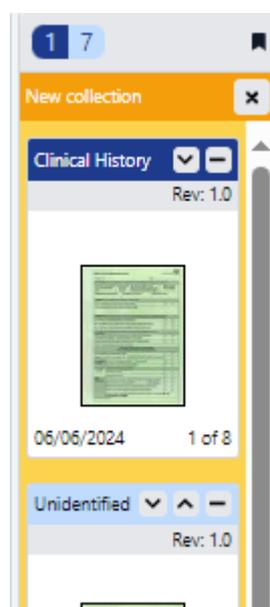


The Page or Bundle is added to the Collection View:

Note how those Pages' or Bundles' + icon has now toggled to a - icon, to enable you to remove a Page or Bundle from this Collection, either from within the Pages View or the Collection View.

Pages removed in this way are only removed from the Collection, not the Patient's Health Record.

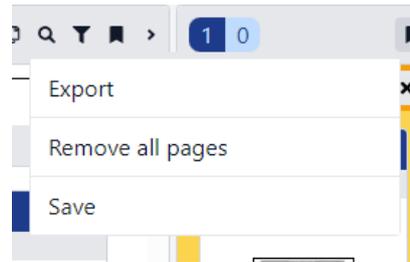
To re-order the Pages or Bundles in the collection, click on the **Up** or **Down** arrows on the required item(s)



Once you have finalised your Collection, click the **Ribbon** in the Collection View (not the Pages View)



The **Collection Menu** displays:



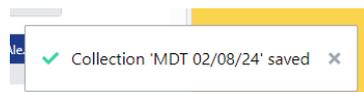
**Export** – is not available to Affinity users

**Warning:** If you don't save a Collection before closing the Collection View, you will lose the Collection's contents.

Click the **Save** option

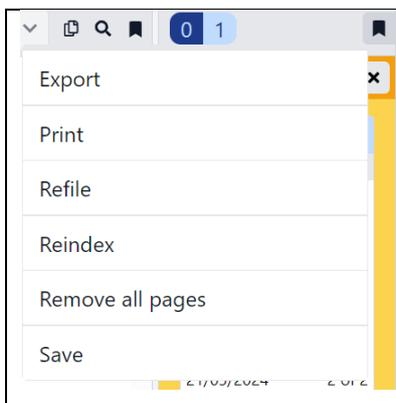
The **Save Collection** window displays:

Complete the details accordingly then click the **Save** button.



**Note:** The Public tickbox means this collection is available to ALL users when they select the Collections icon for this patient.

The full Collection Menu is as follows but is role and site-based:



- **Export** – produces a PDF file (not available to Affinity users)
- **Print** (only available to Health Records users)
- **Refile** (only available to Health Records users) – Move to a different Patient's Health Record
- **Re-index** (only available to Health Records users) – Set to a different Document Type
- **Remove all Pages** – clear the currently displayed Collection
- **Save** – This saves your Collection to your login so is always available until you decide to delete it

All users can use Remove all Pages and Save. All unavailable options will be hidden from the menu so please don't raise this as an IT issue.

If any Pages need to be **Refiled** or **Re-indexed**, please report to Health Records using the Report an Issue function, when in Page View from the **Settings Cog**  in the top right corner – see the **Report a Scanning Issue** guide for more details.

Please see the **Save and View a Collection** guide for further details, if required.