

## TEMPLATE INSTRUCTIONS

### Importing Templates into Medical Director

Templates are usually in rtf (Rich Text File) format.

Please note: **They must not be opened except in Medical Director. To import them into Medical Director:**

1. Right-mouse click on the file and select **Save Target As**. Go to the folder or location on the hard drive of the computer where you want to save it, and select **Save**;
2. Start the Letter Writer module (either from the main menu or from within a patient record by selecting **Tools > Letter Writer** from the menu bar);
3. Click **File > Modify Template** from the Menu Bar;
4. Select **Blank Template**;
5. Click **Open**;
6. Select **File > Import** from the Menu Bar;
7. Find and select the template file to be imported, and either double-click on it or press 'open' - this will import the template into Medical Director;
8. Modify the layout if required to suit the page;
9. Save the template by selecting **File > Save as Template** from the Menu Bar;
10. Type in a new name for the template and click on **All Users** or **Current User** depending on who is to have access to the template;
11. Click **Save**;
12. This will save the template under the **User Defined** tab.

### Using Templates

To create a letter or document based on a template, you must open Letter Writer from within a patient record.

1. Select **File > New** from the Menu Bar
2. Highlight the template to be used under the **User Defined, Supplied** or **Summaries** tab and click **OK**
3. Respond to any prompts for addressees, dates, drop-down boxes, etc
4. Check the completed letter or document and make any changes required
5. Save the letter in the patients file by selecting **File > Save** from the Menu Bar or clicking the Save icon on the Toolbar
6. Complete or modify the **Letter Details**
7. Click **Save**.

To print the letter, select **File > Print** from the Menu Bar, or click the **Print** icon on the Toolbar.

## Modifying Templates

To make changes to a template:

1. Open Letter Writer from the main menu or from within a patient record;
2. Select **File > Modify Template** from the Menu Bar;
3. Select the template to be changed (or Blank Template to create a new one);
4. Make the required changes to the template;
5. Save the template by selecting **File > Save as Template**;
6. Either save the template with the same name or type a new name and click **Save**.

## Adding or Deleting Rows in a Table

Some information in templates is set out in tables. These can be distinguished by the lines surrounding the text.

- Text can be added or deleted within the boxes in the normal way;
- Rows can be removed by placing the cursor in the row to be deleted and choosing **Table > Delete > Row** from the Menu Bar;
- Rows can be added by placing the cursor in the row adjacent to where the row is to be inserted and choosing **Table > Insert > Row above/Row below** from the Menu Bar;
- Moving within a table is done by clicking in a cell with the mouse, by using the arrow keys, or by using the **Tab** key to go forward and **Shift +Tab** to go back.

## Auto Text

Auto text is used to save time by storing frequently used phrases or paragraphs.

To create an entry in Auto Text:

1. Select **Edit > Auto Text** from the Menu Bar;
2. Click on the **Add** button;
3. Type the text in the **Auto Text** box and a shortcut on the **Shortcut** box;
4. You can cut and paste from another document into the text area;
5. Click **OK**.

To insert Auto Text into a letter or document:

1. Position the cursor where you want the text and type the shortcut;
2. A popup box with the Auto Text will appear. Press **Enter** to add the Auto Text to your document. To ignore the Auto Text, keep typing;
3. If you cannot remember the shortcut, select **Edit > Auto Text** from the Menu Bar, highlight the shortcut from the list, and click **Insert**.