

Importing Templates Into Clinical Software

If you are downloading the template from the Web, simply “Right-click” on the link and save to your computer using “Save Target as”. Do not open the template in your word processing program, as this can disable the template fields.

Medical Director 2 and 3

The template will usually be in the form of an “.rtf” file. Ensure that you have this file, either on a floppy disk, or saved on your hard drive.

In Medical Director, go into Letter Writer.

From the File menu, select “*Modify Template*”

Select “*Blank Template*”

From the File menu, select “*Import*”

Browse to where you have the rtf file saved.

Select the file and click on “*Open*”

From the File Menu, select “*Page Setup*” and adjust the margins, (usually 6-10mm each side)

From the File menu, select “*Save as Template*”

Type an appropriate name, and decide whether you want to make the template available to yourself, or all users. (User Access Buttons)

Click on “*Save*”

The template is now available for use through Letter Writer using the “*New*” command or Icon Button.

Best Practice

The template will usually be in the form of an “.rtf” file. Ensure that you have this file, either on a floppy disk, or saved on your hard drive.

Open a New Letter and from Templates menu select “*Import template*”

Locate file and open

From the File Menu, select “*Page Setup*” and adjust the margins, (usually 6-10mm each side)

From File menu select “*Save as*”

Type in an appropriate Template name, and tick the “*Available to all users*” box if appropriate.

Click on “*Save*”

MedTech32

If importing a document/template from the MedTech website or from a zip file; first save the document to your computer. Every MedTech template has a code. It is advisable to check that there is not a conflict between codes of existing documents before importing new ones.

Go into MedTech32 and select *Setup ► In / Outbox ► Outbox Document*

Select *Document ► Import Disc*. An Information window will be displayed.

Click OK. The Insert Disc window will be displayed.

Click *Cancel*. The Open window will be displayed.

Highlight the document to be imported.

Click *Open*. An Information window will be displayed.

Click *OK* or press Enter.

If required go into “*Page Setup*” and adjust the margins, (usually 6-10mm each side)