

Clinical Templates – Importing and Exporting

In order to be able to import the document into Zedmed Clinical, the document must first be saved as a Rich Text Format (RTF) File. WP Templates will only accept documents in this file format, and does not accept Word Document or PDF Files.

Please Note: If you are importing documents not created within Zedmed Clinical WP Templates, but through a third party software, the document may not be compatible even if it is saved as an .rtf file. In this instance it is recommended to recreate the template within WP Templates on a new blank template.

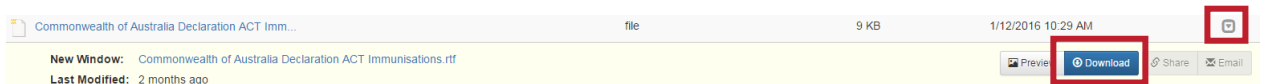
To Import a Template into Zedmed Clinical

- Go to 'Tools', 'Clinical WP Setup' and select 'WP Templates'.
- Click on 'File' and select 'Import Template'.
- Click on the 'Browse' button and find the location of where the document you wish to import is saved, and click on it to select.
- Click 'Open'.
- Type in a name for the template in the 'Description' field.
- Click on 'OK'. Your template has now been imported successfully into Zedmed Clinical and will be available to choose from under the 'My Templates' section.

To Import a Template from the Zedmed Website into Zedmed Clinical

There are a range of templates available on the Zedmed website that have been created within Zedmed Clinical, fitted with relevant mergefields throughout the document. To import a template from the Zedmed Website:

- Go to www.zedmed.com.au and click on the 'Client Login' button at the top right hand corner of the screen. Sign in with your Client Login Account.
- Click on 'Client Login Area' and click on the 'Clinical Templates' folder.
- Locate the template you wish to download from one of the folders within 'Clinical Templates'.
- To download a template, click on the arrow box icon located next to the file name to expand the file information. Then click on download button to download the desired template.



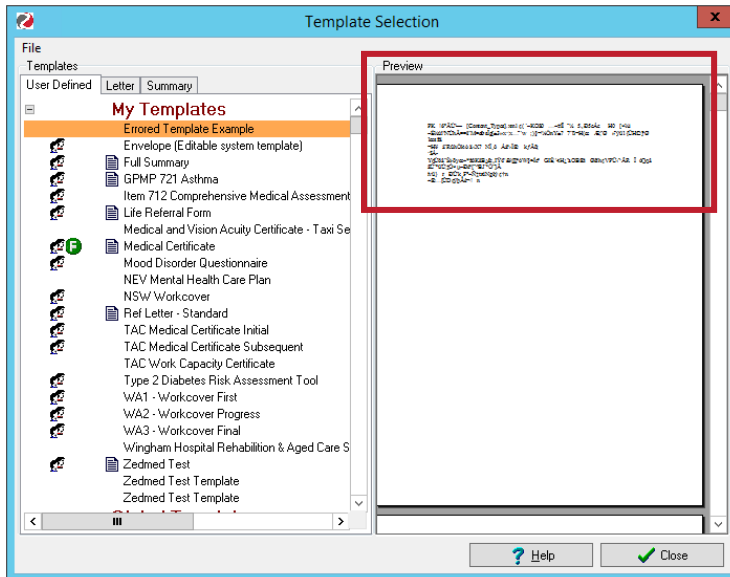
Please Note: It is very important after downloading the template to not open this in another program (e.g. Microsoft Word) before importing into Zedmed. If you do this will corrupt the formatting of the template,

and the document will be unusable. If this occurs, download the file, and import the newly downloaded file directly into Zedmed.

- Open and Login into Zedmed.
- Click on 'Clinical Records' under the 'Reception Tab'.
- Go to 'Tools', 'Clinical WP Template' and select 'WP Templates'.
- Click on 'File' and select 'Import Template'.
- Click on the 'Browse' button and find the location of where the document you wish to import is saved, and click on it to select. The document will most likely be saved into your 'Downloads' folder, depending on your computer setup.
- Click 'Open'.
- Type in a name for the template in the 'Description' field.
- Click on 'OK'. The template has now been imported successfully into Zedmed Clinical and will be available to choose from under the 'My Templates' section.

Template Importing Troubleshooting

When importing a document into Zedmed Clinical, your document may appear with symbols rather than content.

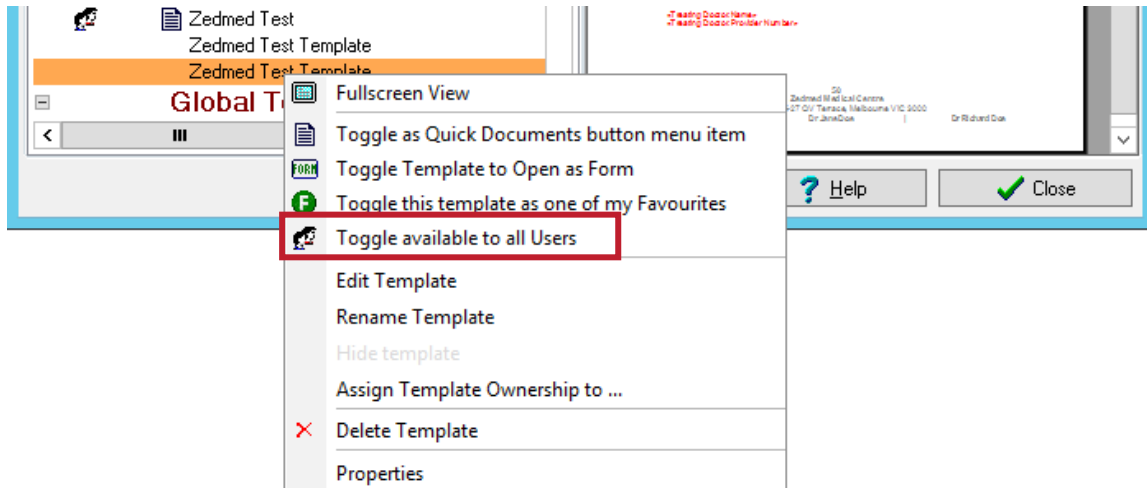



If this occurs, this is due to the fact the document is not saved as an .rtf file format. In this instance please resave the document as an .rtf file format. If after resaving as an .rtf file this still occurs, this is due to the fact that this document has not been created within Zedmed Clinical and is not compatible. To resolve this, it is recommended to recreate the document on a blank template within Zedmed Clinical.

Make the Template Available for All Users

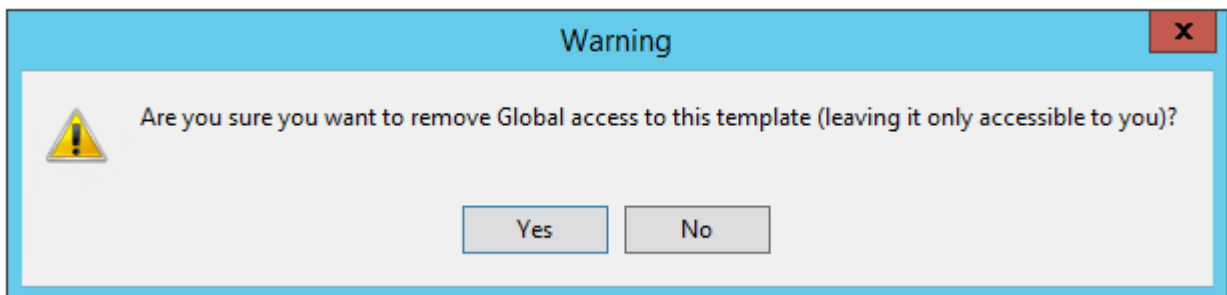
After importing a template, you may wish to make the template available to all users. To do this:

- Go to 'Tools', 'Clinical WP Setup' and select 'WP Templates'.
- Right click on the template and select 'Toggle available to all Users'.



Next to the template name this icon:  will appear, showing that this template has now been made available to all users.

- To make this template unavailable to all users, simply right click on the template and select 'Toggle available to all Users' once more. You will be prompted with the following message:

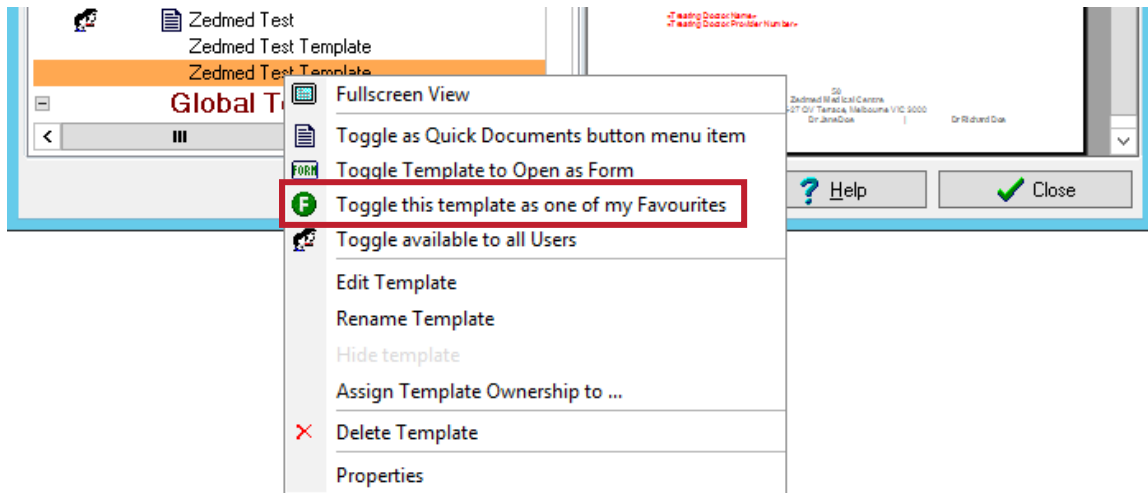


Click on 'Yes' to make unavailable to all users.

Make the Template a Favourite

After importing a template, you may wish to save the template as one of your favourites. To do this:

- Go to 'Tools', 'Clinical WP Setup' and select 'WP Templates'.
- Right click on the template and select 'Toggle this template as one of my Favourites'.



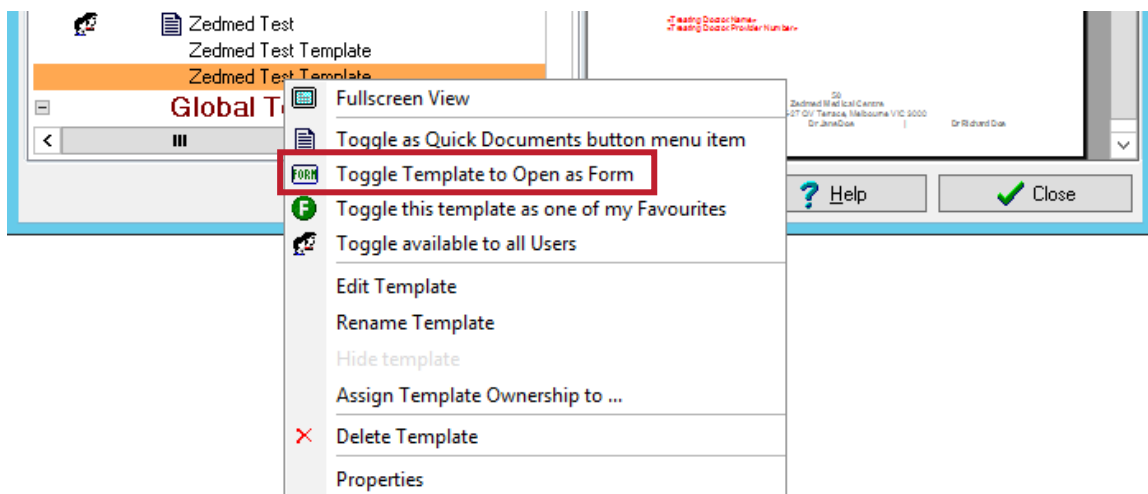
Next to the template name this icon: **F** will appear, showing that this template has now been added to 'My Favourites'.

- To remove the template from 'My Favourites', simply right click on the template and select 'Toggle this template as one of my Favourites' once more.

Make the Template a Form

After importing a template, you may wish to make the template a Form. To do this:

- Go to 'Tools', 'Clinical WP Setup' and select 'WP Templates'.
- Right click on the template and select 'Toggle Template to Open as Form'.



Next to the template name this icon: **FORM** will appear, showing that this template has now been made a 'Form'.

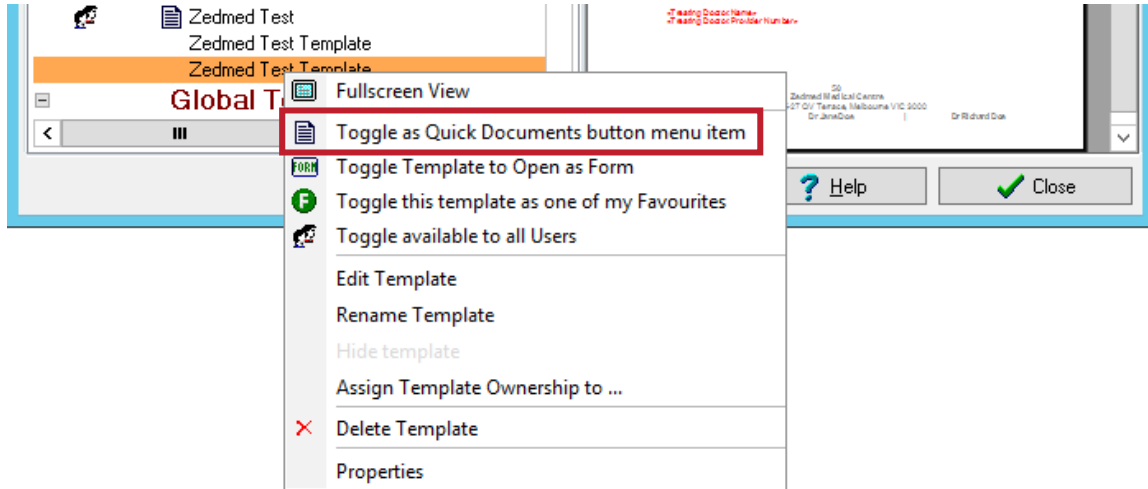
- To change the form back to a standard template, simply right click on the template and select 'Toggle Template to Open as Form' once more.




Add a Template to Quick Documents

After importing a template, you may wish to add this template to 'Quick Documents'. To do this:

- Go to 'Tools', 'Clinical WP Setup' and select 'WP Templates'.
- Right click on the template and select 'Toggle as Quick Documents button menu item'.



Next to the template name this icon:  will appear, showing that this template has now been added to 'Quick Documents'.

- To remove the template from 'Quick Documents', simply right click on the template and select 'Toggle as Quick Documents button menu item' once more.

To Export a Template from Zedmed Clinical

- Go to 'Tools', 'Clinical WP Setup' and select 'WP Templates'.
- Click on 'File' in the top left hand corner of the 'Template Selection' screen, and select 'Export Template'.
- Click on 'Browse', choose a location to save the template to, and click 'Save'.
- Tick the 'RT Format' box. **Please Note:** This must be ticked in order to successfully export the template.
- Click on 'OK'. Your template has now successfully been exported out of Zedmed Clinical.

Please Note: It is very important if you are exporting the template out of your Zedmed Database to import it into another Zedmed Database, to not open this in another program (e.g. Microsoft Word). If you open the exported template before importing into Zedmed this will corrupt the formatting of the template, and the document will be unusable. If this occurs, delete the corrupted file and re-export the template out of Zedmed Clinical.

Last Reviewed: 05.05.2017