



Template Instructions

Importing Templates into Medical Director

Templates are usually in the form of an .rtf (Rich Text File) file. **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**.