

Import, export and copy a template

From the Template Manager screen, you can:

- Import templates into EMIS Web, this will save you time creating them from scratch.
- Export templates, to share templates with other users, if required. You can only import/export clinical templates as .xml files; document templates can be imported as .doc, .docx and .rtf files, and exported only as EMIS Web Document Template (.ewdt) files.


Import a template

You can import document templates created in a previous system for use in EMIS Web. EMIS Web uses Microsoft Word integration, so existing form fields (for example, text fields, radio buttons and check boxes) will be preserved. Furthermore, the existing EMIS LV and EMIS PCS mail merge fields are converted to new EMIS Web merge fields after import.

Also, if you are using non-EMIS document templates you need to ensure that the document templates you want to import are saved in a compatible format (supported file formats are .doc, .docx and .rtf) on your system. You will need to replace any existing merge fields with EMIS Web merge fields.

Documents may require editing before you can use them in EMIS Web.

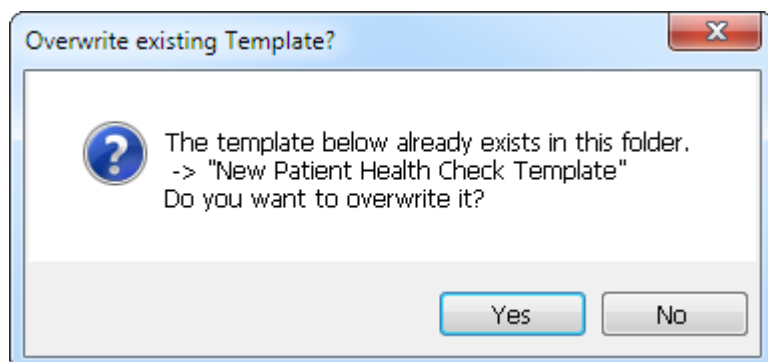
1. Access Template Manager.

To access Template Manager, click , point to **Configuration**, and then select **Template Manager**. The Template Manager screen is displayed.

2. In the navigation pane, click the **Templates & Protocols** or **Document Templates** tab, as required.
3. Select the folder where you want to save the imported template, and then on the ribbon click **Import**.
4. On the Open screen, navigate to and select the required template, and then click **Open**. The template is imported to the selected folder.



If there is an existing clinical template with the same name as the template you are importing, the following screen is displayed.




Example Overwrite screen

Do one of the following:

- To import the clinical template and overwrite the existing template, click **Yes**.
 - To cancel the import, click **No**
5. Document templates are assigned a version number if there is an existing template with the same name rather than replacing the stored version.

Export a template

1. Access Template Manager.


To access Template Manager, click , point to **Configuration**, and then select **Template Manager**. The Template Manager screen is displayed.

2. In the navigation pane, click the **Templates & Protocols** or **Document Templates** tab, as required.
3. Navigate to the required template, and then on the ribbon, click **Export**.
4. On the Save As screen, navigate to the location where you want to store the exported template, and then click **Save** to export the template to the selected location.

You're not able to export templates if the file name contains an invalid character. Invalid characters are <>:"*?|.

Copy a template

1. Access Template Manager.

To access Template Manager, click , point to **Configuration**, and then select **Template Manager**. The Template Manager screen is displayed.

2. In the navigation pane, click the **Templates & Protocols** or **Document Templates** tab, as required.
3. Navigate to the required template, and then on the ribbon click **Copy**.

4. In the navigation pane, select the folder you want to copy the template to, and then on the ribbon click **Paste**, to paste the template to the requested folder.

Merge fields can't be copied from one document to another. Although a merge field may appear to have been copied, it isn't functional and therefore needs to be added again.