# Manage Office RTF templates

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Zedmed Office uses templates for letters, labels and reports. A standard set of templates is included with Zedmed and you can also create your own using Microsoft Word or Zedmed's Internal RTF editor. The RTF editor is for Zedmed Cloud customers and those using remote (RDP) connections.

## Office Templates overview

When you create letters, print labels or run some reports, a template is used to apply settings, add content and import data.

**FRM templates ( Microsoft Word editor -** has its own templates guide. **)**

Word templates have the prefix FRM and each template is linked to a data source Word document (prefixed DS) to support mail merge functionality. The FRM templates and DS documents are stored in the C:\Zedmed\Document and C:\Zedmed\Label.

To access FRM templates, go to the Zedmed Office menu and select **WP setup > FRM Documents.**

**RTF templates (Internal Zedmed editor -** explained in this guide**)**

In Zedmed v36.3.3 and later, users have the option to use Zedmed's internal Rich Text Format (.rtf) editor. RTF templates use a Data Tool to add data fields to the template, which import a patient's address and clinical information directly from Zedmed.

To access FRM templates, go to the Zedmed Office menu then select **WP setup > Maintain Templates.**

**Template types**

| | |
|---|---|
| **Letters - FRM** | FRM Letter templates are used to write letters from the Patient Record's Letters menu. |
| **Letters - RTF** | There are no Letter templates for the RTF editor. Clinical's Batch writer is used to write letters for RTF users. |
| **Mail Merge** | Used in the Appointment Report Mail Merge tab, Patients Report Mail merge option, Recalls Report letter's |
| **Labels** | Used by the Patient Record Print > Label menu and Appointment Details Print Label button. |
| **Forms** | This single template is used to print out patient details from the patient record. |

## Set Word (FRM) or Zedmed(RTF) as the editor

You can create and edit Office templates using either Microsoft Word (.doc format) or Zedmed's internal editor (.rtf).

To set the Office Template editor:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup**.

   This will open the **Practice Details** screen.
3. From the **Template Mail Merge using** dropdown, select **MS Word** or **Internal**.



4. Select **Close** to save and exit.

**Note**: Zedmed's **Print Mapping Setup** screen (F5), has a drop-down field for Label Printing Method with the options: Internal or MS Word. This only applies to the 2 Office templates with the word 'Internal' in their name - they need 'Internal' selected to print correctly. This setting is not related to the type of editor you are using and does not need to be changed.



# Create custom RTF templates

RTF templates were introduced in Zedmed v36.3.3 for Zedmed Cloud and RDP users who do not have access to Microsoft Word. All standard Word templates are provided in the new RTF format, but if a customer created custom templates in Office, they will need to recreate those templates using the RTF editor.

**Letter Templates**
There are no Letter templates for the RTF editor. Instead, Clinical's Batch writer is used to write letters and is

Zedmed's recommended letter writer for both RTF and FRM sites due to the Data Tool's functionality.  To create custom Letter templates, see the Managing Clinical Templates guide.

**Label templates**

Most custom Word templates that need to be recreated in RTF will be for labels. The steps below explain how to create custom templates for Reports (Mail Merge) and the Patient Details Form, and there is a dedicated section following this just for labels.

**Custom template considerations**

You can create custom RTF templates using the following options:

- **Edit**: Edit an existing template and save it with the same name - shown in the steps below.
- **Duplicate**: Create a duplicate of an existing template, save it with a unique name then edit it.
- **New**: Create a blank template, manually add information and save it with a unique name.

The steps for **Edit**, **Duplicate** and **New** are very similar. Edit is used in the steps below, with notes added for Duplicate or New.

To create a custom RTF template :

1. Go to Zedmed's **Management** tab.
2. Select **WP Setup** > **Maintain Templates.**

   The **Maintain Office Template screen** will open and show 3 tabs:

   - **Mail Merge Documents -** to format Office reports.
   - **Labels -** to print patient and appointment labels.
   - **Forms -** to print out a patient's details.
3. Select the template tab required: **Mail Merge**, **Labels** or **Forms**.
4. Select an existing template.
5. Select **Edit**.

   When you select **Edit,** the **Edit Office Template** screen will open. The **Save** button is greyed out until something is changed.

   If you are making a **New** or **Duplicate** template:

   a) Give the template a unique name.

   b) Select the **Type** to determine what document or label will use this template in Zedmed.
6. Check the **Visible** check box selected.

   This will show as Y or N in the **Visible** column and determines if the template appears as an option for Mail merge or Labels.

   If there are multiple templates with the same type and all of them are active, the first one on the list will be used.
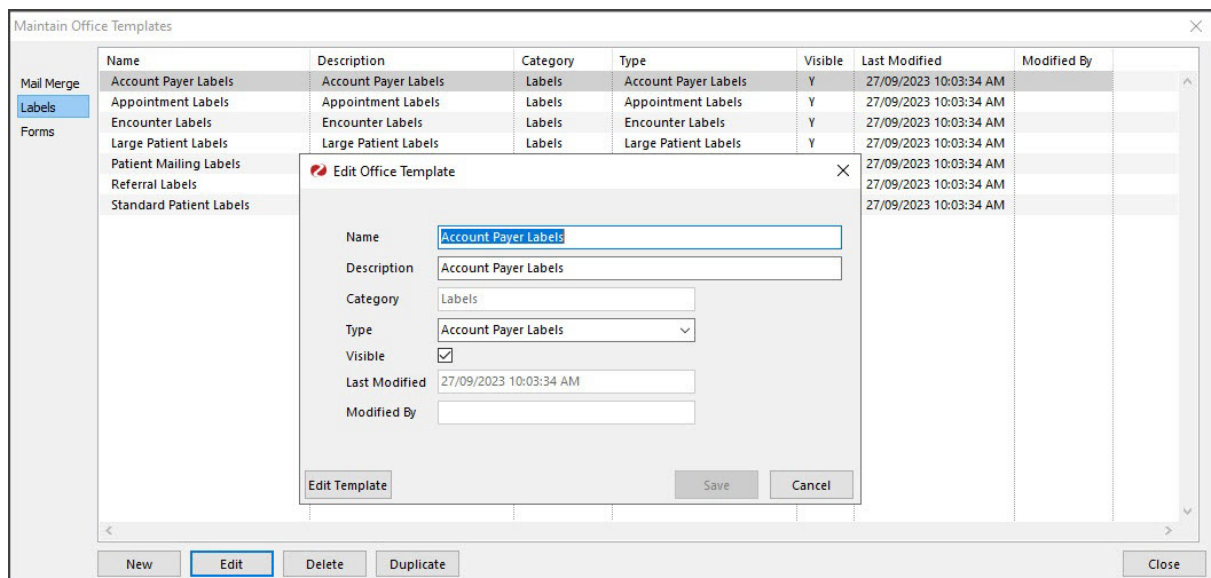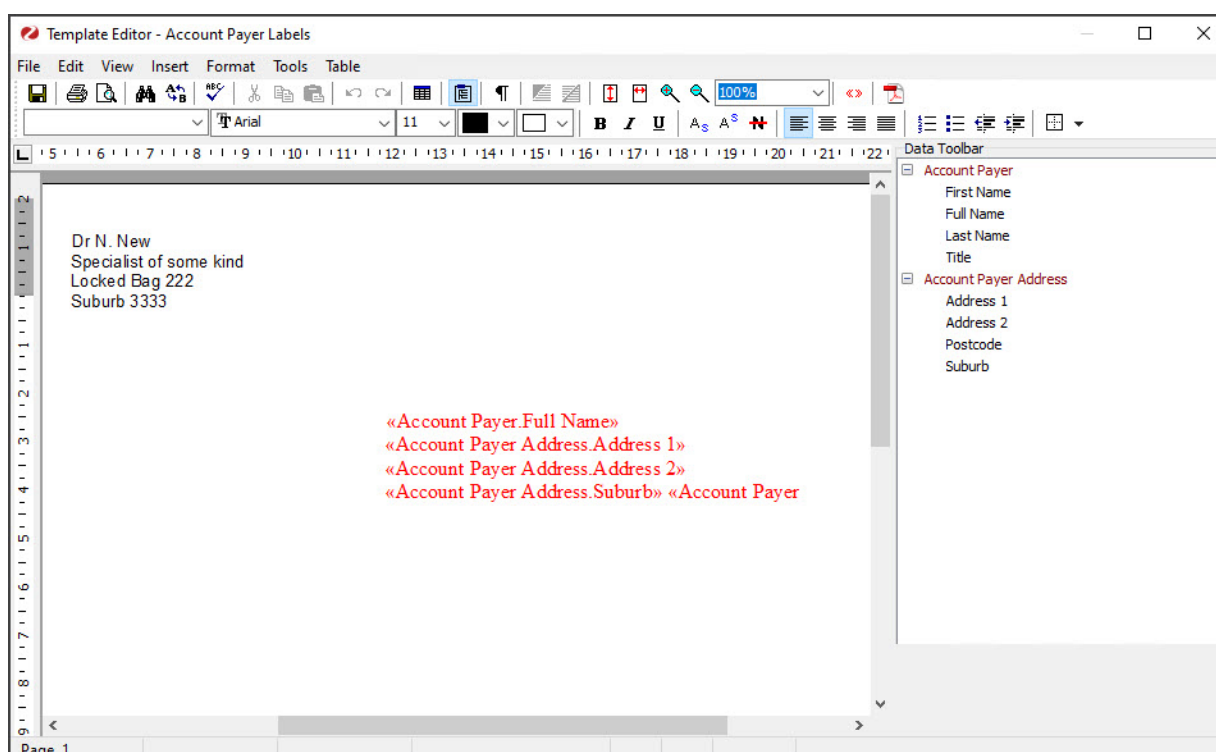
7. Select **Edit Template**.

   The template will open in the Zedmed RTF editor.

   The example below is for a Label.

   Forms and Mail Merge tab templates will show clinical and demographic options in the Data Toolbar.



8. Make the required edits to any information in the template.

   You can delete existing data fields and add new ones.

9. To use the Data Toolbar to add data fields:

   a. Locate the information by expanding the categories.

   b. Select a space on the letter.

      This is where the information will be added from the Data Toolbar.

      c.  Double-click the category item you want to add.
10. When you have finished, select **File** > **Save** then **File > Close.**
11. Select **Save** again on the **Edit Office Template** screen.
12. Test that the template reflects the intended changes.

     For example, if you updated a template to add text to a letter, use the Letter writer to check that the new text appears.

# Create custom RTF label templates

This guide explains how to locate an FRM label template's settings and apply those settings to a new custom RTF label template.

Below are the two features that use label templates:

- **Patient Record:** Print > Label menu has a set of 4 labels. These are linked to the 4 default label templates in Zedmed.
- **Appointment Details:** the Print Label button uses the Appointment Labels template.

**Step 1: Check the original label template you want to recreate.**

In this section, you will open and record the settings used in the custom FRM (Word) template will recreate.

1. Make sure Word is set as the template editor for Zedmed.
2. Select **WP Setup** > **FRM Documents a**nd open the Label template.
3. Select the **Labels** tab.
4. Open the custom template.

     Respond to the prompts and the template will open in Word.
5. **Note down** the font and font size. Check each line for any differences in font size.
6. From the template, select **File** > **Page Setup.**

     This will open the **Page Layout.**
7. **Note down** or screenshot with width, height and margins.
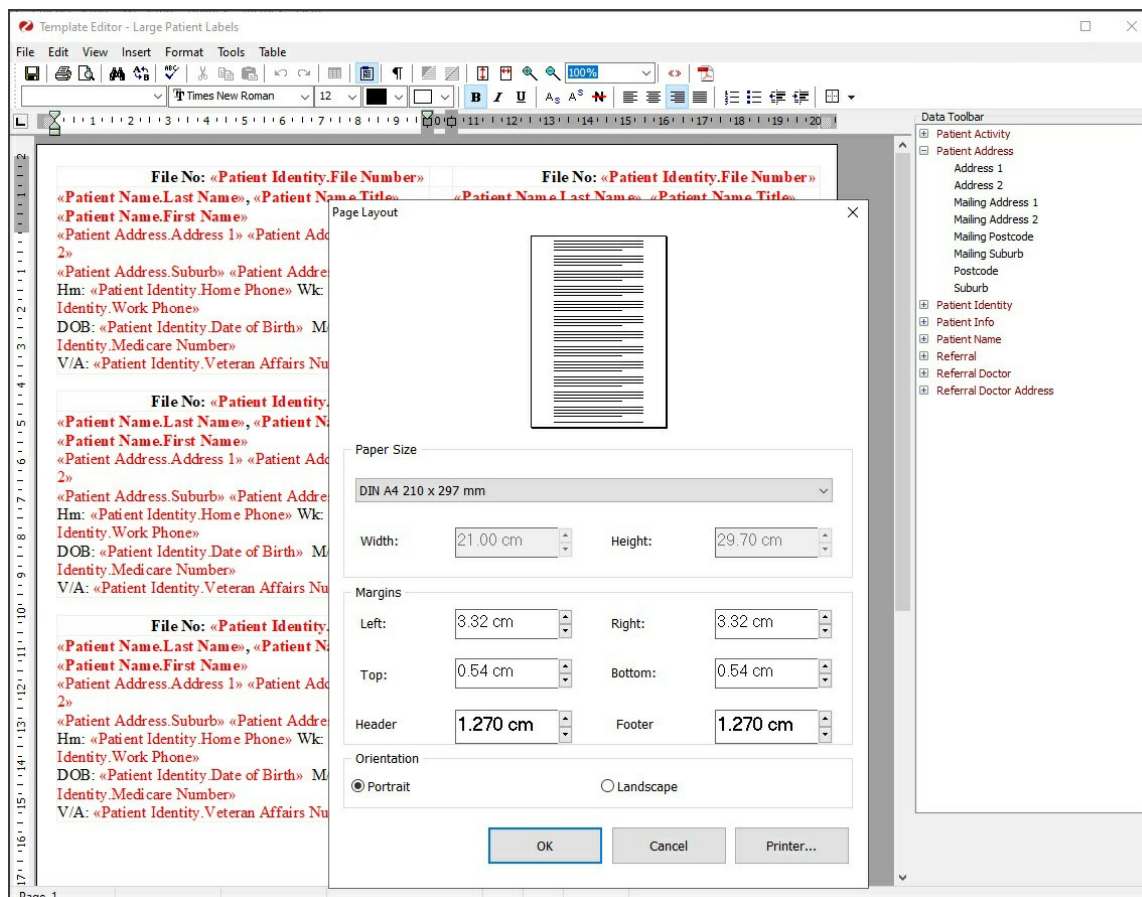
## Step 2: Create a new RTF label template.

In this section, you will create a new label and add the required data fields (similar to mail merge fields)

**Important**: when you create a custom RTF label, the template may show a single label's contents spread across 3 or more labels. This is expected and correct, as long as it only prints out on one label.

1. Change the Zedmed template editor back to RTF.
2. Select **WP Setup** > **Maintain Templates.**
3. Select the **Labels** tab.
4. Select **New**.

   The **New Office Template** screen will open.

   You could also **Edit** an existing template. This is recommended for complex templates that are variations of standard templates.

5. Give the template a unique name.
6. Select the **Type** to determine what Label menu item will use this template.
7. Confirm that the **Visible** check box is ticked.
8. Select **Edit Template**.

A blank template will open in the editor.

9. If you need 2 columns for the template's layout, insert a 2x1 table using the **Create Tabel** icon. If you require a more complicated grid, we recommend creating a duplicate of an existing template similar to your requirement and editing it.

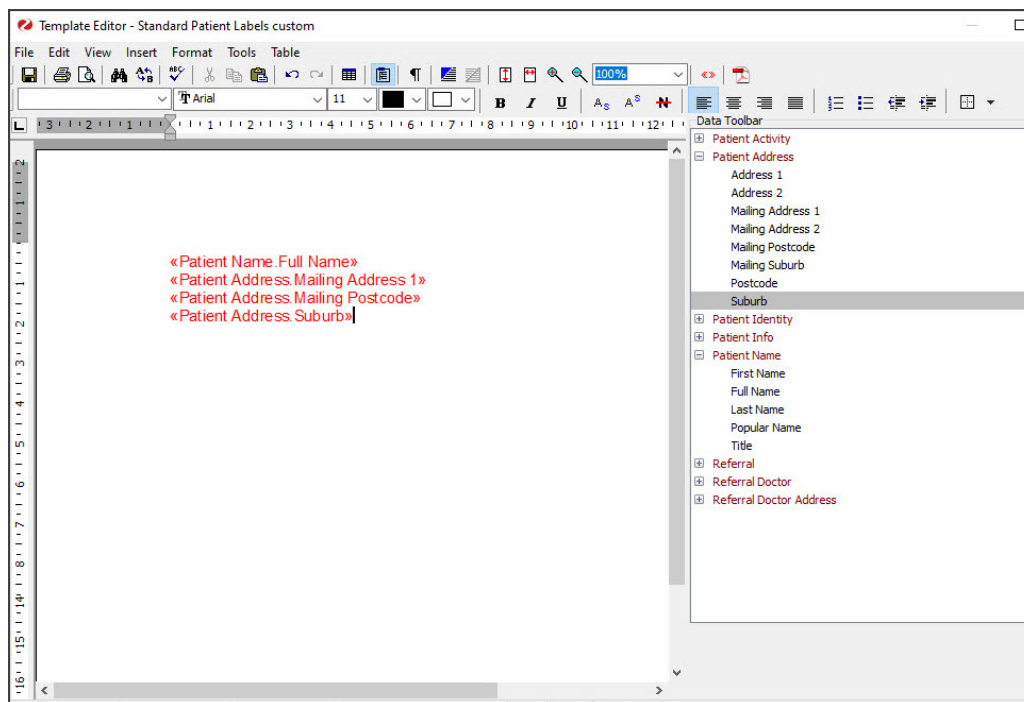10. Use the **Data Toolbar** to add the required fields:

If you are editing an existing template, you can also delete fields.

a) Locate the information by expanding the Data Toolbar categories.

Select a space on the letter.

b)This is where the information will be added from the Data Toolbar.

c) Double-click the category item you want to add.

## Step 3: Apply the settings to the new RTF label

In this section, you will review the setting so the label prints out correctly.

1. Click on each line added and check the font and font size shown in Word.

   In the screenshot above, it shows "Arial 11"

2. If the font or font size is different to the size in the original template, change it to match.

   E.g, if the original was Arial 9pt and the Toolbar added size 11pt, select the text and select 9pt Arial font.

3. Select **File** > **Page Layout**.
4. Check the settings you noted in Step 1 are the same:
   a. Check the paper size.
   b. Check the Width and Height
   c. Check the Margins
5. Select **Landscape** for the Orientation. This will be different to FRM templates, which use Portrait.
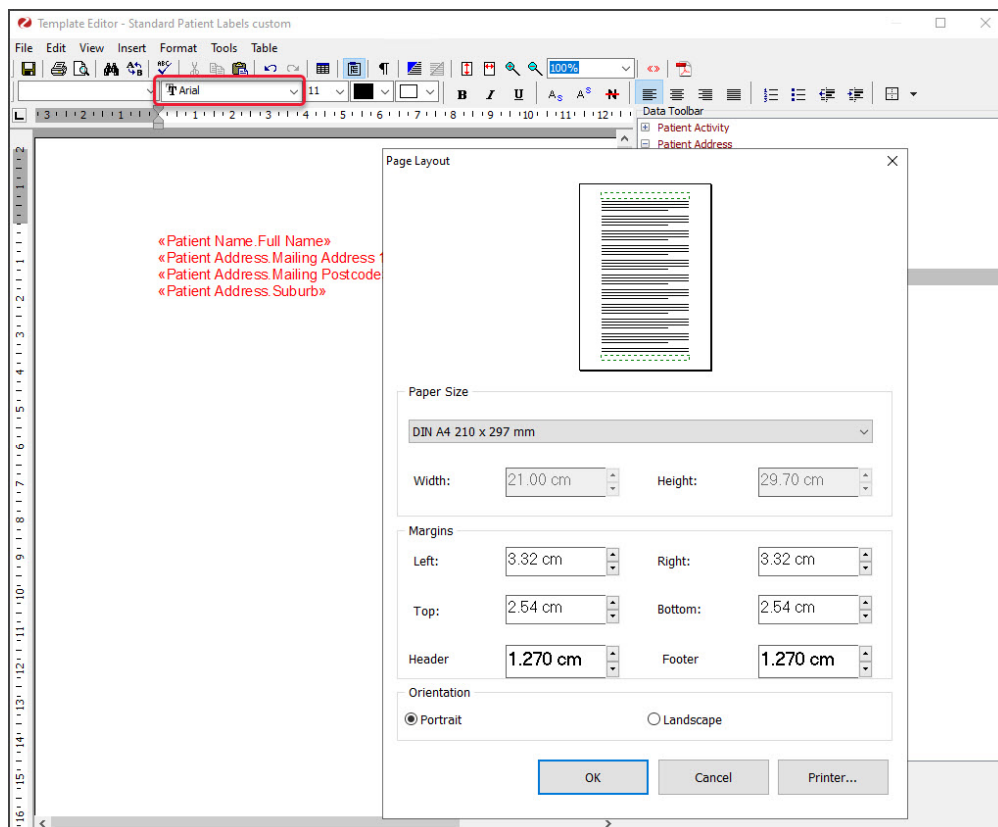
6. When you have finished, select **File** > **Save** then **File > Close.**
7. Select **Save** again on the **Edit Office Template** screen.

   Note: some labels will use 3 or more label displays in the template. This is fine as long as the label only prints on 1.
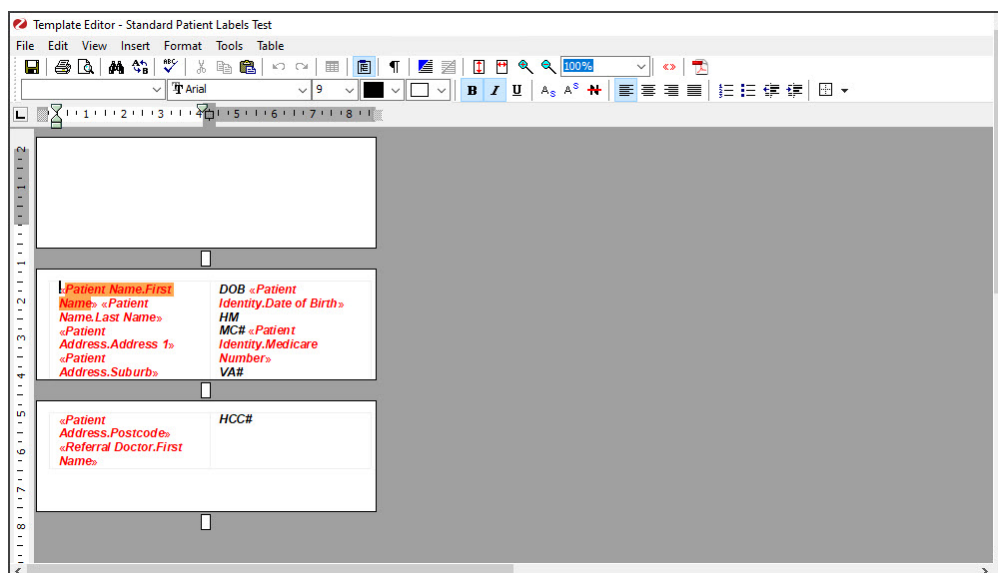


### Step 4: Name and test print the new RTF label

In this section, you will check the label template name and make sure it prints correctly.

1. Confirm that the custom template has the same name as the standard template it replaces.

   If required, use the **Edit** button to rename the template you copied or the original.

For a Patient Record, each of the 4 Label options is linked to the template with that name and Zedmed only works with that name.
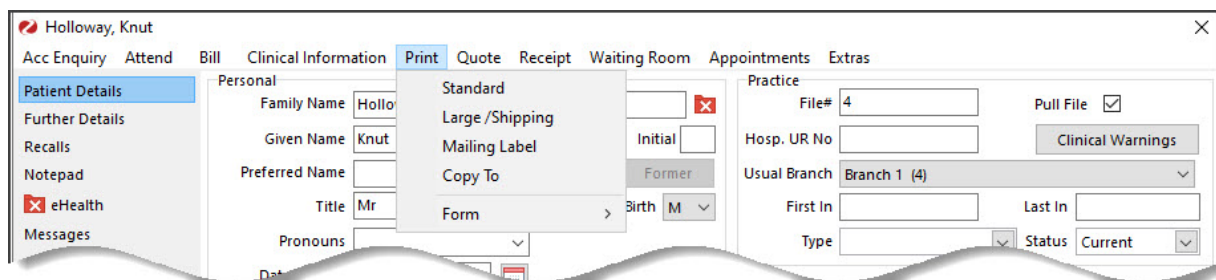


2. Use the applicable Zedmed function to print the labels.

   For example, if you created a custom Standard Label, select **Print**>**Standard** from the Patient Record.
3. Check that the label prints out correctly and only uses 1 label.
4. If information prints across more than 1 label or if there is a blank label:

   - Check the font size is not larger than the original template font.

   - Reduce the margins or height in the Page Layout.
5. Trial and error may be required to finalise more complex labels.