Template Editor

User Instruction

NOTE: This information is also discussed in ProgressNotes.User document as well. This is located in the Knowledge Base in SPA.

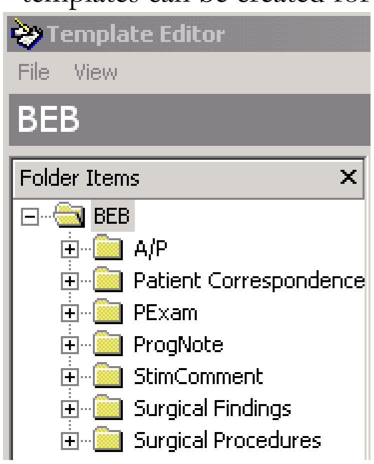
Template Editor

To use templates in various areas of RESource, they must first be created. Default templates can be set up by a RESource administrator and would be available to everyone in the designated user group. For example, if a default template called 'VOR Procedure' has been set up for the physician user group, all physicians will have access to it. If the default templates for your user group do not appear in the Template dropdown list then you need to go into your personal Template Editor and link them. If there are no default templates for your user group you can also create your own.

To link default templates:

1 – in the main menu go to the Tools option and select Template Editor

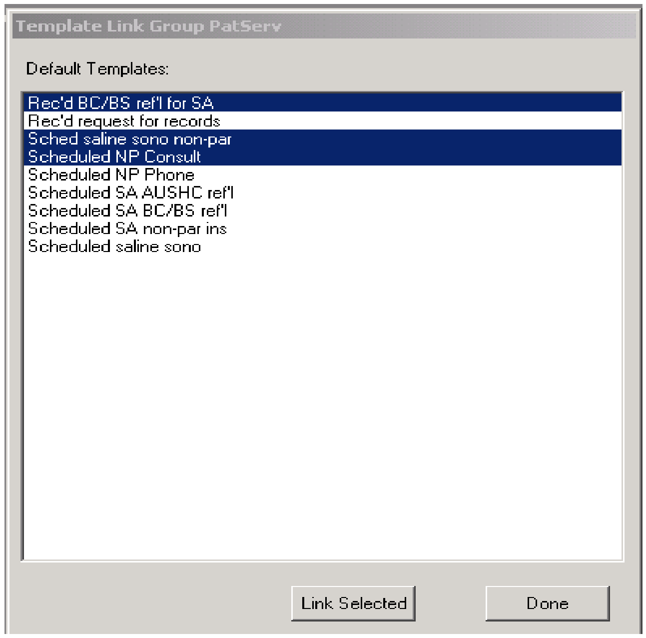
2 - The Template Editor window will appear with a folder tree along the left side. For progress note templates, select the ProgNote folder. (You will notice many other template folders – templates can be created for any of the areas listed.)



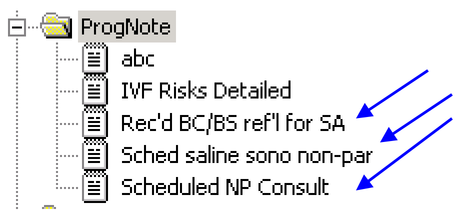
3 – Go to the File menu and select Link Template. A list of available default templates will appear.

4 – Select all desired templates by clicking on them

5 – Click the Link Selected button



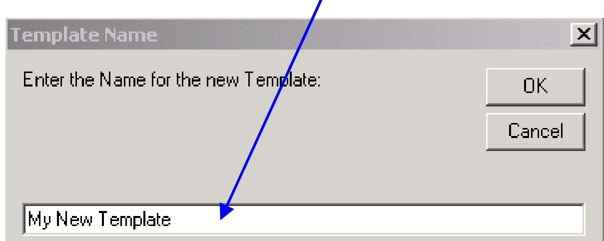
Upon clicking the (+) sign to the left of the ProgNote folder you will now see any templates you have just linked.

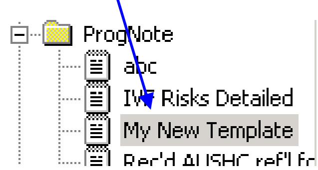


To create your own templates in the Template Editor:

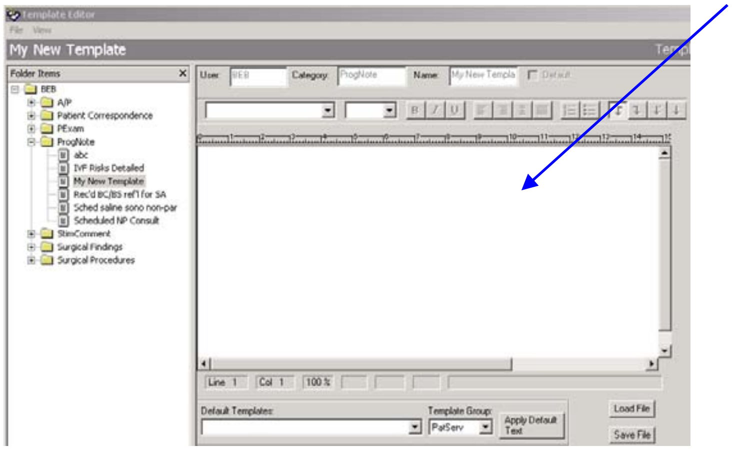
1 - Go to the File menu and select New Template

2 - enter a template name when prompted – the new blank template will now appear in your template list.

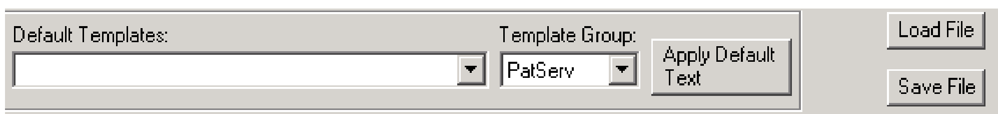




3 - Type your template in the space provided



You will also notice a Default Templates and a Template Group dropdown list at the bottom of the new template – these give you the ability to add text from any default templates and customize it as your own.



To add text from a default template, select the desired template group and default template and click the Apply Default Text button – the text from the default template will appear in your new template (wherever your cursor was in the template). The same formatting features available in progress notes are also available when creating templates.

For instructions on how to use the Load File and Save File buttons refer to "Importing and Exporting" that follows.

4 - Go to the File menu and select Save Template

Importing and Exporting

When working in the Template Editor you have the option to import and export your templates for possible use outside of RESource.

To Export a template:

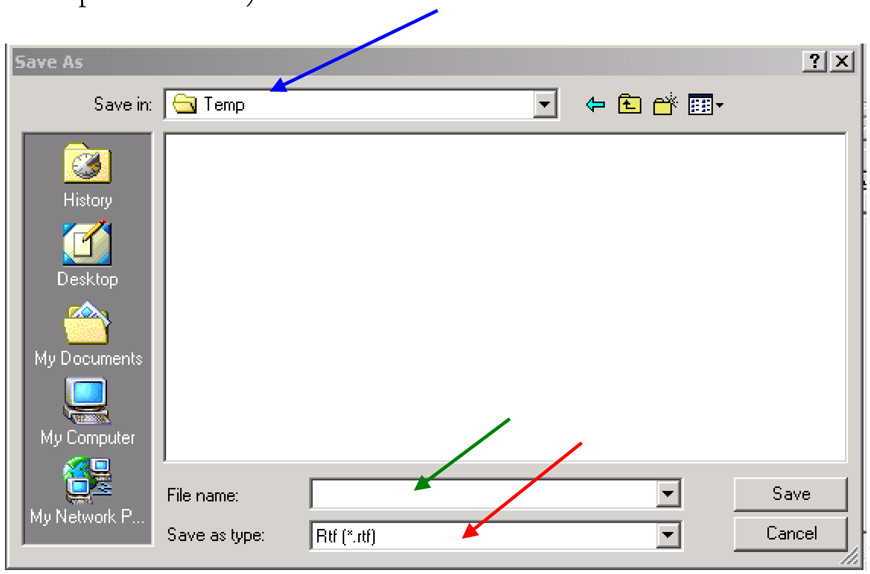
1 – From the Template Editor, open the template you wish to export by clicking on it in the folder tree

2 – Click the Save File button

3 – When the Save As window appears, select the folder you would like to save the text in (blue arrow in picture below)

4 – Enter a name for your saved template (green arrow in picture below)

5 - Select the file type you would like to save in from the 'Save as type' dropdown list (red arrow in picture below)



5 – Click the Save button

6 – The text of your note will be saved for future use (in the directly you specified in step #3)

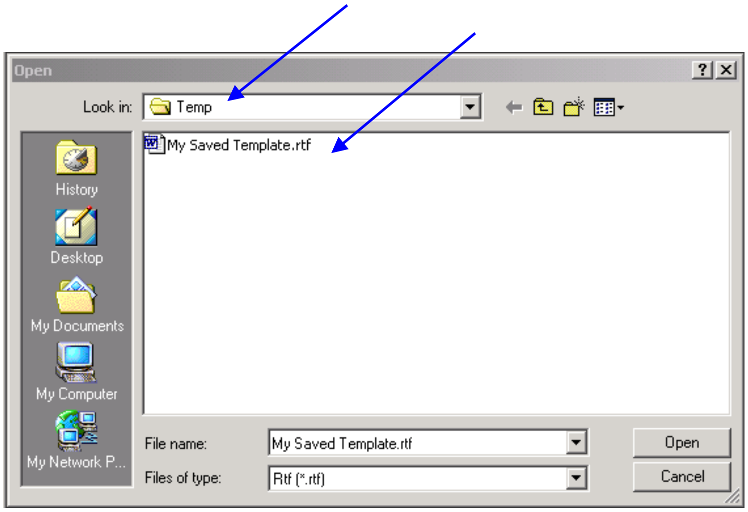
To Import into a template:

1 – From the Template Editor, open the template you wish to import to by clicking on it in the folder tree (the template must be a new template – you cannot import text into an already saved template)

2 – Put your cursor on the spot in the template text where you would like your imported file to appear

3 – Select the Load File button

4 – Select the folder and file you wish to import from the Open window that appears (blue arrows in picture below). Note that you can only import .rtf and .doc (Word) file types.



5 – Click the Open button

6 – The imported file will appear in the template

7 – When the template is complete go to File – Save Template (in the Template Editor)