

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.

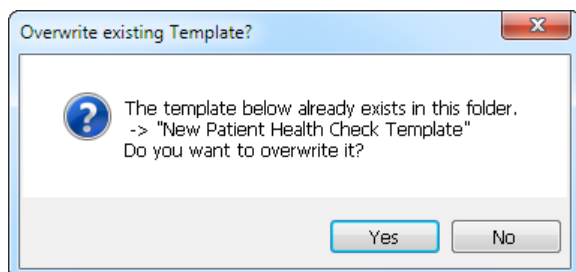
3 Select the folder where you want to save the imported template, and then on the ribbon click **Import**.

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**

Document templates are assigned a version number if there is an existing template with the same name rather than replacing the stored version.