

Module 7 – How to Manage Your Word Documents

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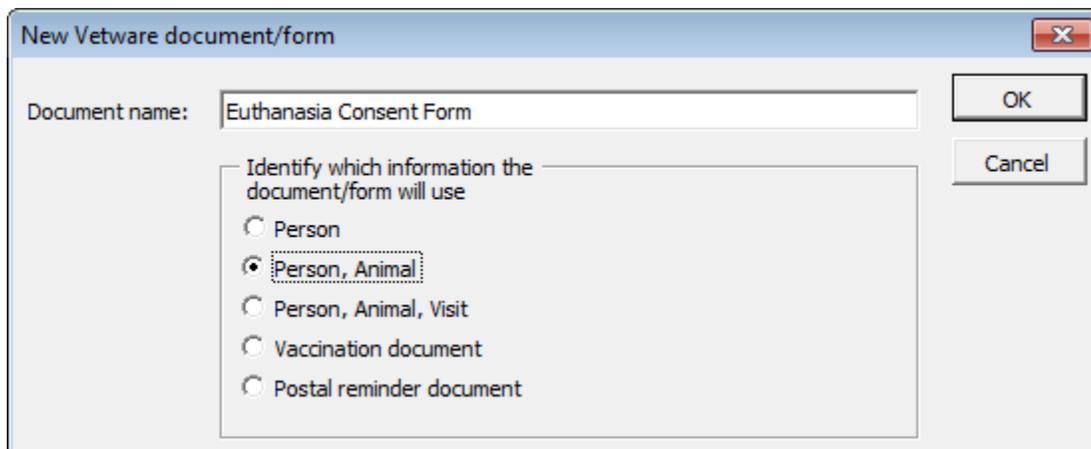
1. Creating Documents

The automated printing of customized documents is one of the many benefits of Vetware 4. Utilizing the Mail Merge functionality of Microsoft Word and our automated Print Manager application, you will be able to generate a variety of personalized documents from Vetware 4. From certificates, consent forms, custom labels or client information forms, the possibilities are truly endless. As a bonus, Microsoft Word (2003 edition or newer) only needs to be installed on *one* computer, yet *all* computers will have the capability of generating these documents from Vetware 4.

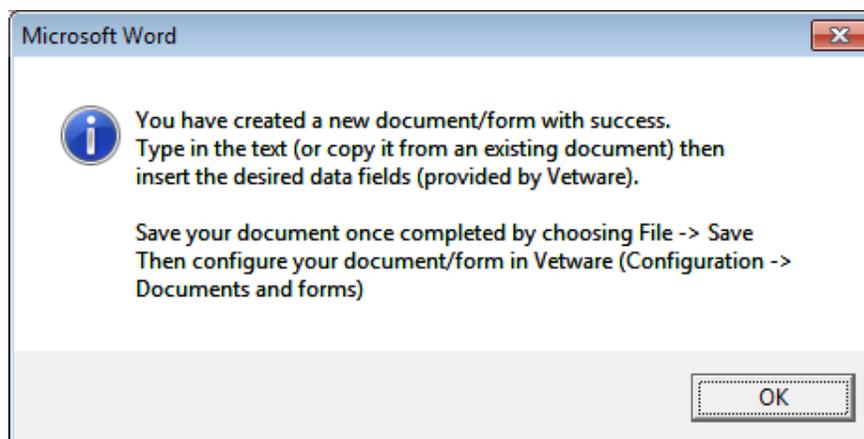
- You may begin with an existing Word document, or start from scratch
- Open Microsoft Word (or open an existing document that you wish to configure for use with Vetware 4)
- Click on Add-Ins... LogiVet... New LogiVet Document / Form...



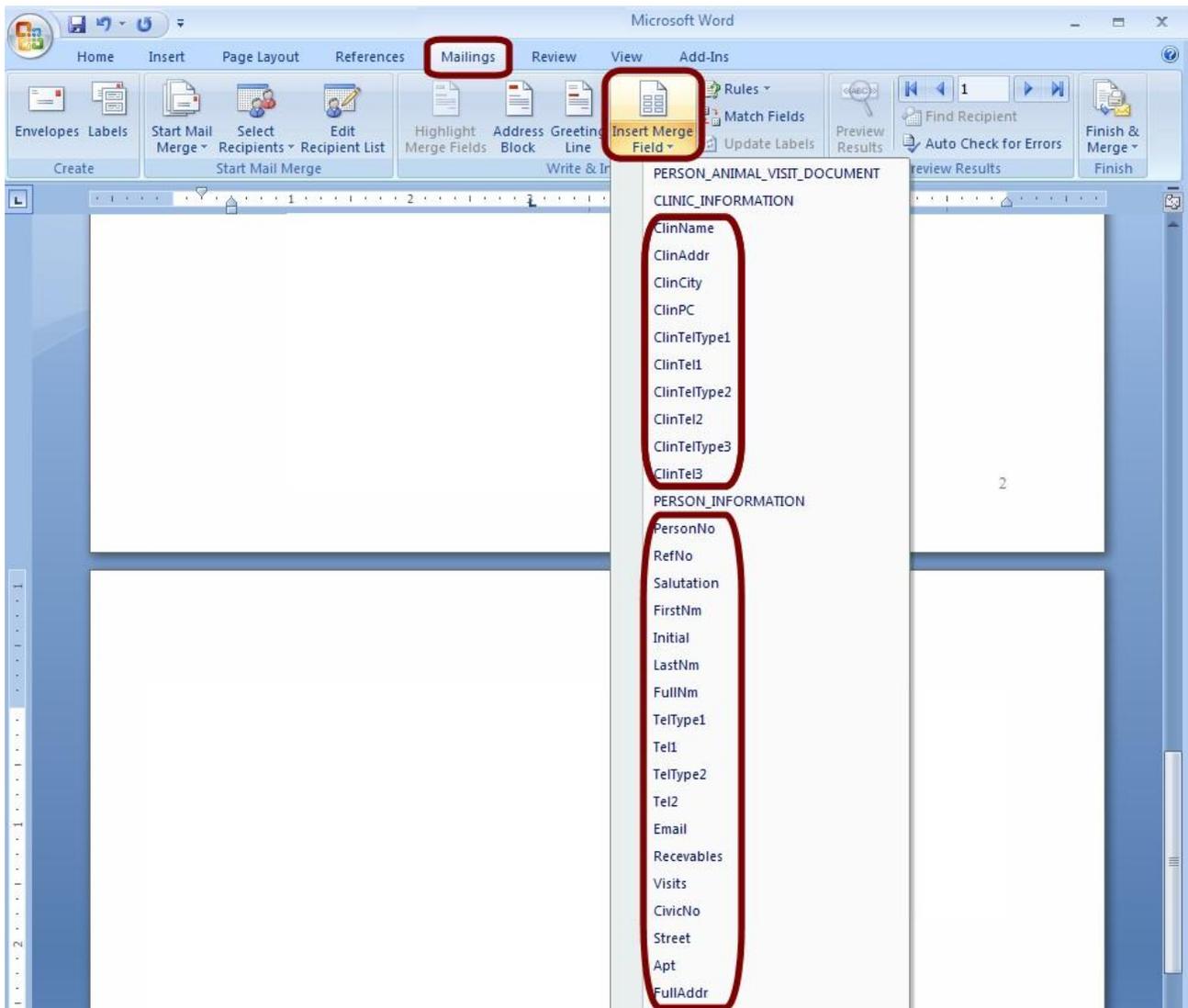
- From the next screen, type in the name of the new Document
- Select the document type



- Click OK to create a new document template



- Document types indicate what data fields will be available to merge into the document
- The type of document also determines when the document will be visible for printing from Vetware 4
 - Person available when a client is selected
 - Person, Animal available when an animal is selected
 - Person, Animal, Visit available when a visit is selected
 - Vaccination document available when a visit is selected
 - Postal Reminder document available from the Reminder batches module
- Next, you can proceed to modify your document in Word
- Position your cursor within the document wherever you wish to insert “custom” information, such as the client’s name, address, animal name, breed, etc.
- Click on Mailings... Insert Merge Field... and select the appropriate merge field



- The title at the top of the list indicates the type of document you are editing (in the example, it is a Person, animal, Visit document)
- Section titles appear in capital letters (they are not actual merge fields), such as CLINIC_INFORMATION and PERSON_INFORMATION as shown in the above example
- Merge fields will appear in your document with double chevrons, as shown here: «AnimalName»

- When the document is printed, these fields will be replaced with the actual data from Vetware 4
- It is possible at this stage to copy text from another document and paste it into this new document
- All possible options in Word for text wrapping and layout are available and these instructions assume a working knowledge of Microsoft Word
- Remember to save your changes once the document is complete

1.1 Merge Field definitions:

Clinic Information

Item	Description of merge field	Merge field
1	Name of the Clinic	ClinName
2	Address of the Clinic	ClinAddr
3	City and Province	ClinCity
4	Postal Code	ClinPC
5	First Phone Number Type	ClinTelType1
6	First Phone Number	ClinTel1
7	Second Phone Number Type	ClinTelType2
8	Second Phone Number	ClinTel2
9	Third Type Phone Number	ClinTelType3
10	Third Phone Number	ClinTel3

Person Information

Item	Description of merge field	Merge field
1	I.D. Number	PersonNo
2	Reference Number	RefNo
3	Salutation	Salutation
4	First Name	FirstNm
5	Initial	Initial
6	Last Name	LastNm
7	Full Name	FullNm
8	First Phone Number Type	TelType1
9	First Phone Number	Tel1
10	Second Phone Number Type	TelType2
11	Second Phone Number	Tel2
12	Email Address	Email
13	Amount of Receivables	Receivables
14	Number of Visits	Visits
15	Civic Number	CivicNo
16	Street Name	Street
17	Apartment Number	Apt
18	Complete Address	FullAddr
19	Second Address Line	OtherAddr
20	City and Province	City
21	Postal Code	PC

Animal Information

1	Animal Number	AnimalNo
2	Animal Name	AnimalName
3	Species	Species
4	Sex	Sex
5	Deceased Status	DeceasedCode
6	Sterility Status	SterilityCode
7	Sterility Description	SterilityDesc
8	Mixed Code	MixedCode
9	Vaccination Code	VaccinatedCode
10	Weight in Kilograms	WeightKg
11	Weight in Pounds	WeightLbs
12	Age in Years	AgeYrs
13	Age in Months	AgeMths
14	Age in Days	AgeDays
15	Year of Birth	DOBYr
16	Month of Birth (numeric)	DOBMth
17	Month of Birth in Short Text	DOBSHORTMth
18	Month of Birth in Long Text	DOBLONGMth
19	Day of Birth (numeric)	DOBDAY
20	Year of Death	DODYr
21	Month of Death (numeric)	DODMth
22	Month of Death in Short Text	DODSHORTMth
23	Month of Death in Long Text	DODLONGMth
24	Day of Death (numeric)	DODDAY
25	Civic License Number	CivicLicNo
26	Year of Civic License Number	CivicLicYr
27	Rabies Tag Number	RabiesNo
28	Rabies Tag Year	RabiesYr
29	Primary Breed	PriBreed
30	Secondary Breed	SecBreed
31	Primary Colour	PriColor
32	Secondary Colour	SecColor
33	Regular Veterinarian Clinic	RegVetClin
34	Regular Veterinarian	RegVet
35	Veterinarian License Number	VetLicNo
36	Veterinarian Graduation Year	GradYr

Visit Information

Item	Description of merge field	Merge field
1	Visit Number	VisitNo
2	Status of the Visit	VisitStatus
3	Assigned Veterinarian	AsgnVet
4	Assigned Veterinarian License Number	AsgnVetLicNo
5	Reason for the Visit	Reason
6	Visit Creation Date Year	VisitCreateDateYr
7	Visit Creation Date Month (numeric)	VisitCreateDateMth
8	Visit Creation Date Month Short Text	VisitCreateDateShortMth
9	Visit Creation Date Month Long Text	VisitCreateDateLongMth
10	Visit Creation Date Day (numeric)	VisitCreateDateDay
11	Visit Closure Date Year	VisitCloseDateYr
12	Visit Closure Date Month (numeric)	VisitCloseDateMth
13	Visit Closure Date Month Short Text	VisitCloseDateShortMth
14	Visit Closure Date Month Long Text	VisitCloseDateLongMth
15	Visit Closure Date Day (numeric)	VisitCloseDateDay
16	Visit Departure Date Year	VisitDepartDateYr
17	Visit Departure Date Month (numeric)	VisitDepartDateMth
18	Visit Departure Date Month Short Text	VisitDepartDateShortMth
19	Visit Departure Date Month Long Text	VisitDepartDateLongMth
20	Visit Departure Date Day (numeric)	VisitDepartDateDay

Vaccination Information

Item	Description of merge field	Merge field
1	Vaccine description 1	Vac1
2	Vaccine program description 1	VacProg1
3	Vaccination effective date 1	VacEffDate1
4	Next vaccination date 1	NextVacDate1
5	Vaccine description 2	Vac2
6	Vaccine program description 2	VacProg2
7	Vaccination effective date 2	VacEffDate2
8	Next vaccination date 2	NextVacDate2
9	Vaccine description 3	Vac3
10	Vaccine program description 3	VacProg3
11	Vaccination effective date 3	VacEffDate3
12	Next vaccination date 3	NextVacDate3
13	Vaccine description 4	Vac4
14	Vaccine program description 4	VacProg4
15	Vaccination effective date 4	VacEffDate4
16	Next vaccination date 4	NextVacDate4
17	Vaccine description 5	Vac5
18	Vaccine program description 5	VacProg5
19	Vaccination effective date 5	VacEffDate5
20	Next vaccination date 5	NextVacDate5
21	Vaccine description 6	Vac6
22	Vaccine program description 6	VacProg6

23	Vaccination effective date 6	VacEffDate6
24	Next vaccination date 6	NextVacDate6
25	Vaccine description 7	Vac7
26	Vaccine program description 7	VacProg7
27	Vaccination effective date 7	VacEffDate7
28	Next vaccination date 7	NextVacDate7
29	Vaccine description 8	Vac8
30	Vaccine program description 8	VacProg8
31	Vaccination effective date 8	VacEffDate8
32	Next vaccination date 8	NextVacDate8
33	Vaccine description 9	Vac9
34	Vaccine program description 9	VacProg9
35	Vaccination effective date 9	VacEffDate9
36	Next vaccination date 9	NextVacDate9
37	Vaccine description 10	Vac10
38	Vaccine program description 10	VacProg10
39	Vaccination effective date 10	VacEffDate10
30	Next vaccination date 10	NextVacDate10
41	Vaccine description 11	Vac11
42	Vaccine program description 11	VacProg11
43	Vaccination effective date 11	VacEffDate11
44	Next vaccination date 11	NextVacDate11
45	Vaccine description 12	Vac12
46	Vaccine program description 12	VacProg12
47	Vaccination effective date 12	VacEffDate12
48	Next vaccination date 12	NextVacDate12

Reminder Information

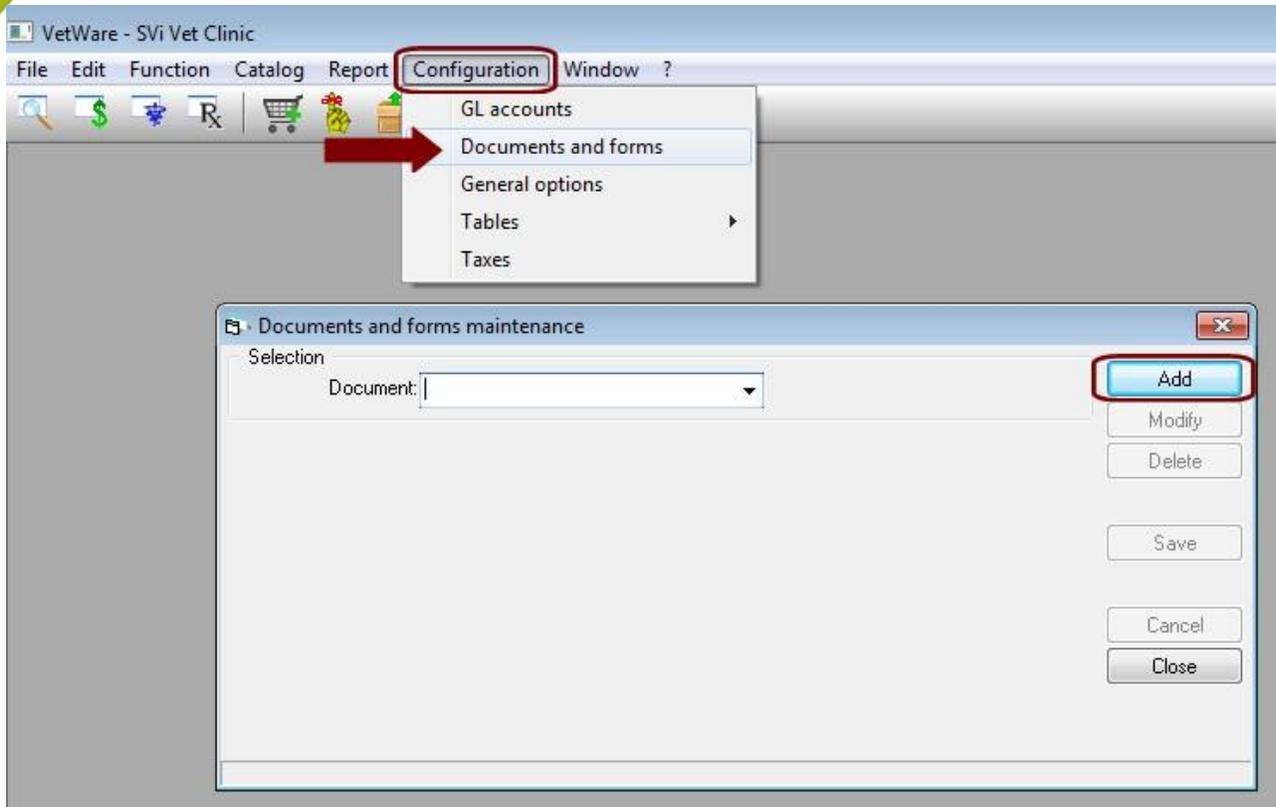
Item	Description of merge field	Merge field
1	Reminder Message	RmdMessage
2	Year of Reminder	RmdYr
3	Month of Reminder (numeric)	RmdMth
4	Month of Reminder in Short Text	RmdShortMth
5	Month of Reminder in Long Text	RmdLongMth
6	Day of Reminder (numeric)	RmdDay

Date Information

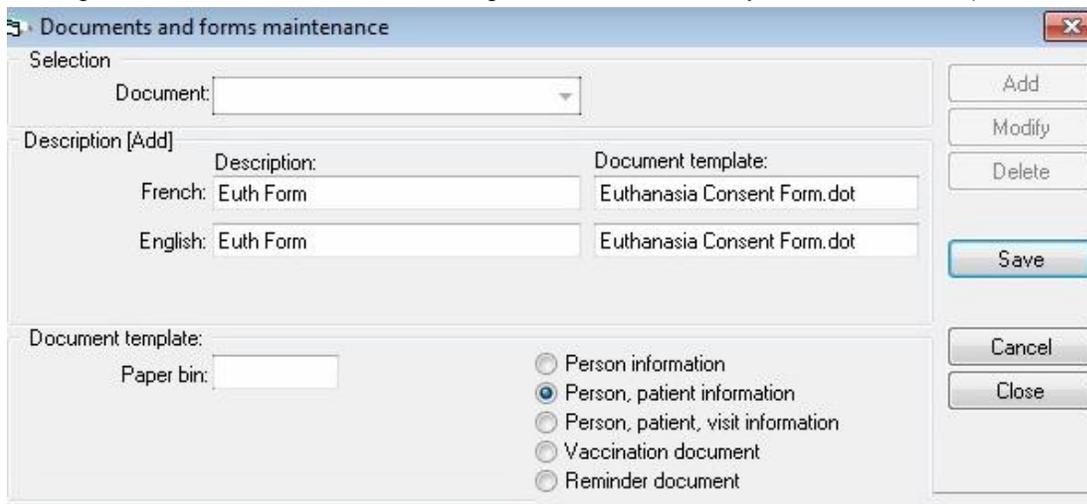
Item	Description of merge field	Merge field
1	Date Year	DateYr
2	Date Month (numeric)	DateMth
3	Date Month Short Text	DateShortMth
4	Date Month Long Text	DateLongMth
5	Date Day	DateDay

2. Linking Documents to Vetware 4

- Once the document has been created in Word, the final step is to register it in Vetware 4
- From Configuration -> Documents and Forms
- Click Add



- Enter the internal description under Description (this will be the registered name of the document in Vetware 4)
- Enter the file name under Document template (this must be the actual name of the Word document)
- Note that these documents are actually saved as templates, with the file extension .dot
- Select the document type (it is very important that the choice here matches the choice made when creating the document, otherwise the merge from Vetware 4 may not be successful)



Documents and forms maintenance

Selection
Document: []

Description [Add]

	Description:	Document template:
French:	Euth Form	Euthanasia Consent Form.dot
English:	Euth Form	Euthanasia Consent Form.dot

Document template:
Paper bin: []

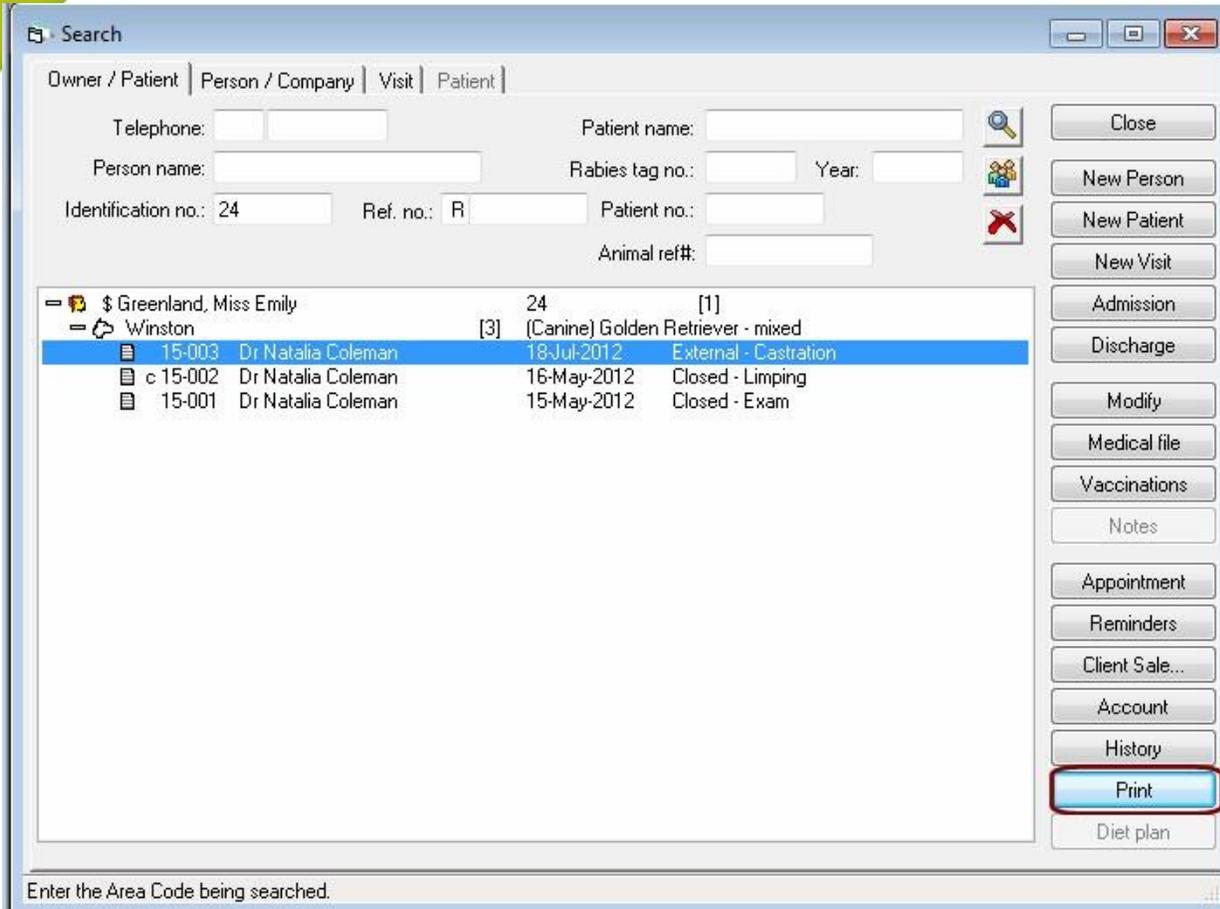
Person information
 Person, patient information
 Person, patient, visit information
 Vaccination document
 Reminder document

Buttons: Add, Modify, Delete, Save, Cancel, Close

- Click Save and Close.
- Vetware 4 will check if the document file exists and is accessible on the server before registering

3. Printing Documents

- Documents are accessible from the Print button  located on the Search window



Search

Owner / Patient | Person / Company | Visit | Patient

Telephone: Patient name:

Person name: Rabies tag no.: Year:

Identification no.: 24 Ref. no.: R Patient no.:

Animal ref#:

\$ Greenland, Miss Emily	24	[1]	
Winston	[3]	(Canine) Golden Retriever - mixed	
15-003 Dr Natalia Coleman	18-Jul-2012	External - Castration	
c 15-002 Dr Natalia Coleman	16-May-2012	Closed - Limping	
15-001 Dr Natalia Coleman	15-May-2012	Closed - Exam	

Close

New Person

New Patient

New Visit

Admission

Discharge

Modify

Medical file

Vaccinations

Notes

Appointment

Reminders

Client Sale...

Account

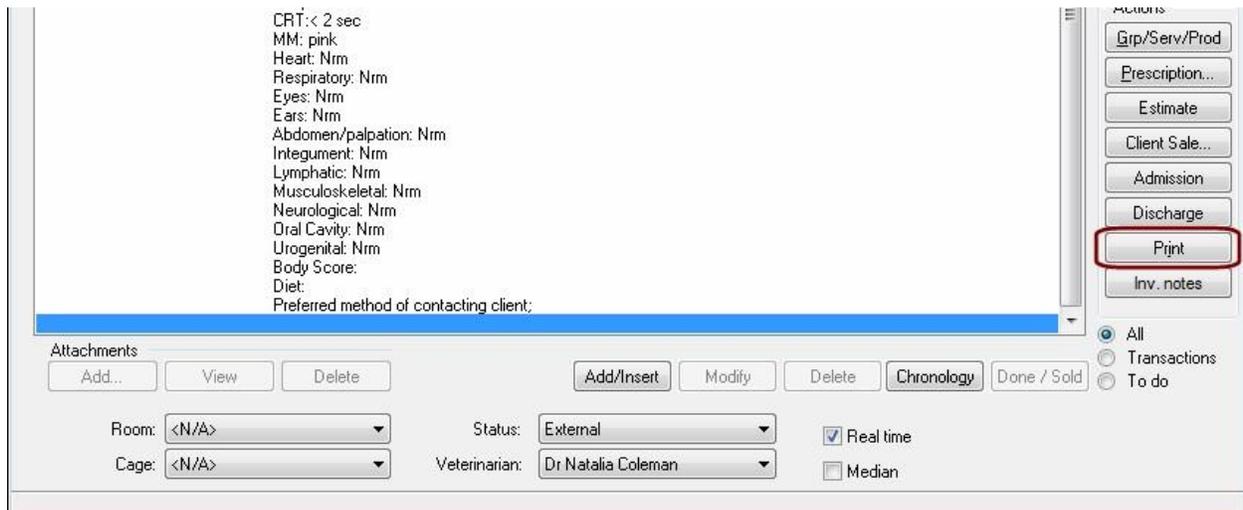
History

Print

Diet plan

Enter the Area Code being searched.

- Documents may also be printed using the Print button located within the Medical File



CRT: < 2 sec
MM: pink
Heart: Nrm
Respiratory: Nrm
Eyes: Nrm
Ears: Nrm
Abdomen/palpation: Nrm
Integument: Nrm
Lymphatic: Nrm
Musculoskeletal: Nrm
Neurological: Nrm
Oral Cavity: Nrm
Urogenital: Nrm
Body Score:
Diet:
Preferred method of contacting client:

Attachments
Add... View Delete Add/Insert Modify Delete Chronology Done / Sold

Room: <N/A> Status: External Real time
Cage: <N/A> Veterinarian: Dr Natalia Coleman Median

PRINTERS

Grp/Serv/Prod

Prescription...

Estimate

Client Sale...

Admission

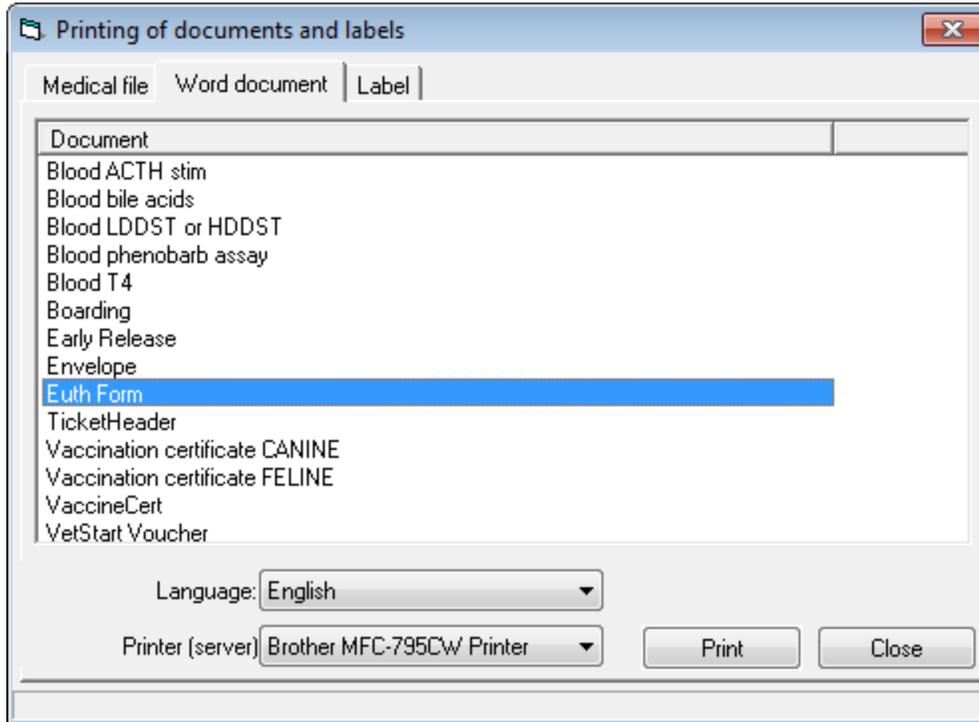
Discharge

Print

Inv. notes

All
Transactions
To do

- After clicking on Print... click on the Word document tab at the top to see a list of available documents



- From the Search window, if a client is selected (left click to highlight a client) prior to clicking on Print, the document list will only show **Person** type documents
- If an animal is selected first, the document list includes **Person** type and **Person, Animal** documents
- If a visit is selected first, the document list includes **Person, Animal, Visit** type documents, as well as **Person... Person, Animal** and **Vaccination** documents
- Likewise, when the Print command is used from within the medical file, all 4 document types will be available
- Click on the document name that you wish to print, select the appropriate language and/or printer, then click Print
- Documents are processed through your Vetware 4 Print Manager and will be sent directly to the selected printer with all of the merged data included
- There is no screen preview and no user intervention required in Word, rather the entire process is fully automated

3.1 Generating Attachments

- Vetware 4 also enables you to save a document as an attachment to the medical file
- In order to do this, you must first select a transaction (detail line) within the medical file
- The document will be "attached" to this line
- Once the line is selected, click Print... Word document... notice a new check box in the lower right corner called "Generate an attachment"
- When selected, "Generate an attachment" prepares the document with merged data and saves it to a directory on the server
- The document does not print, rather an attachment link is created within the medical file



Urogenital: Nrm
Body Score:
Diet:
Preferred method of contacting client:
+ <Attachment> [DOC]: Boarding

Discharge

Print

Inv. notes

- You can then double click on the link to open the document, modify it if desired, then re-save and/or print
- The attachment description appears as the document name, in the medical file

Preferred method of contacting client:
+ <Attachment> [DOC]: Boarding

Modify description

Attachments

Add

View

Delete

Add/Insert

Modifu

Delete

Chronologu

Done / Sold

Inv. notes

All

Transactions

- You can right click on it, then select "Modify description" in order to change the description, if desired
- Type the desired description into the box and click OK:

Attachment ✕

Specify a description for this attachment:

- Finally, your **Reminder** type documents are available for selection from the Reminder Batches feature, located under Function from the main menu
- After generating a batch of reminders, select the appropriate Reminder document and click Print
- As with the other documents, the merging of data and printing functions are fully automated and do not require any user input