Academy SOLUTIONS VET

Module 13
How to Manage & Create Documents

Module 13 – How to Manage and Create Documents

Index

1. Introduction

From now on, there is no need to own a Microsoft Word license to create and manage your documents. But if you need to view an attachment, you can download a free version of MS Open Office. To help speed up the installation, you can use the following link: MS Open Office

If you work for a clinic that is using this software for the first time, you will find templates for your everyday use already configured. You will be able to modify according to your needs.
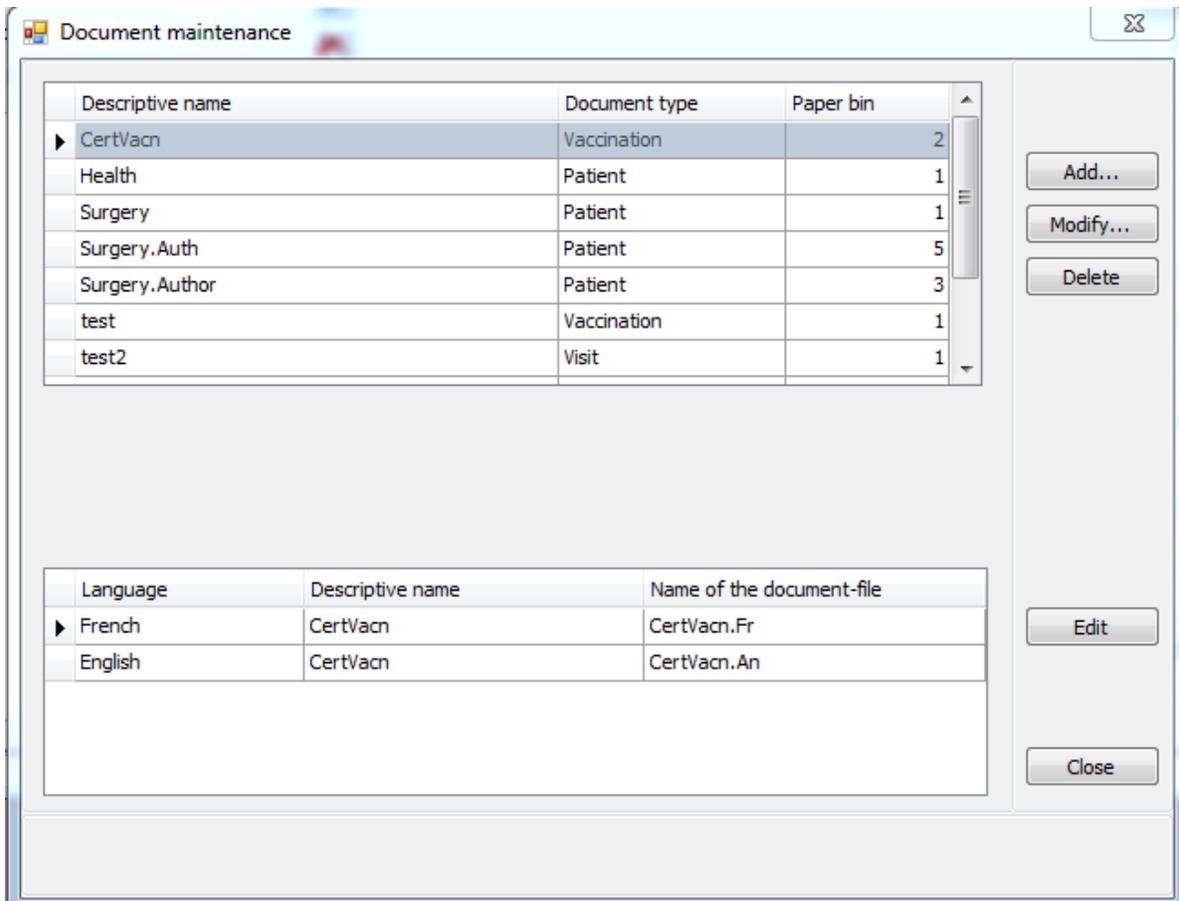
If you work for a clinic that already uses this software, you will find all the documents converted by the Solutions Vet team when you click on **Configuration** and then select **Documents and forms**.

2. Manage Documents and Forms

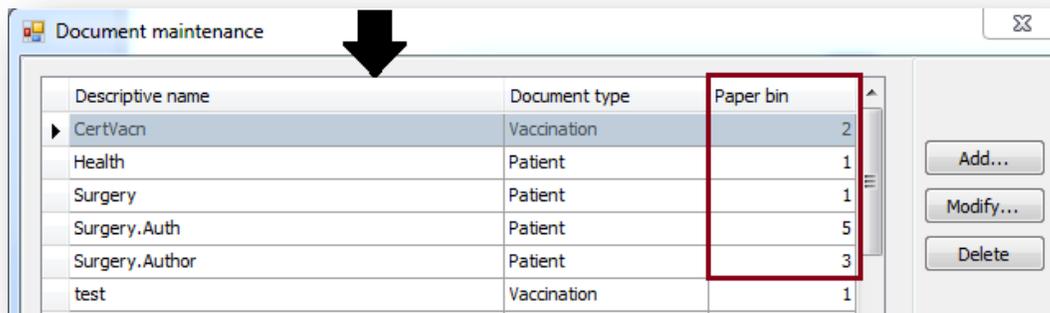In the software, click on **Configuration** and then select **Documents and forms.**
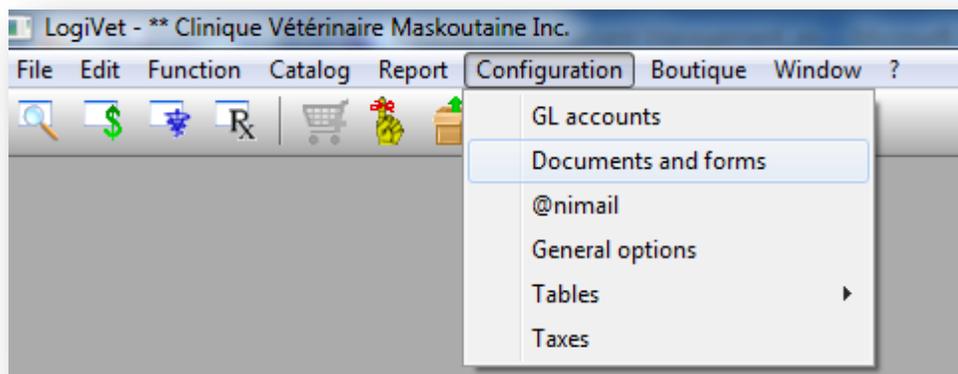
The **Document maintenance** window will open.

From this window, you can create new documents and modify existing ones.

In the top part of the window, you can see the documents names, their type and the paper bin number linked to them.
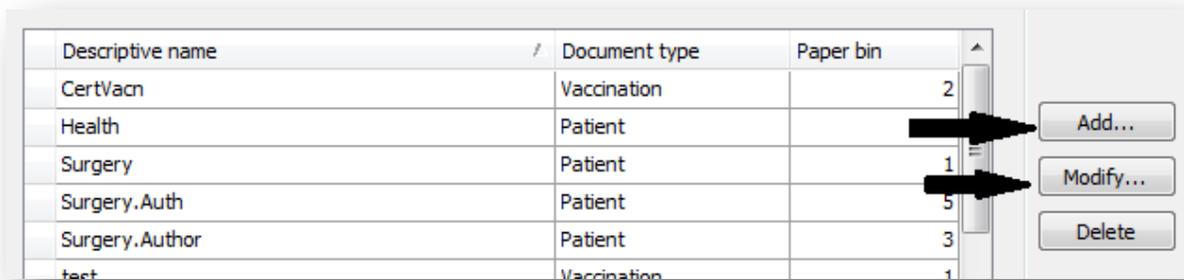
The paper bin uses an internal paper source. Please refer to your printer settings to find out what paper bin is linked to your document.
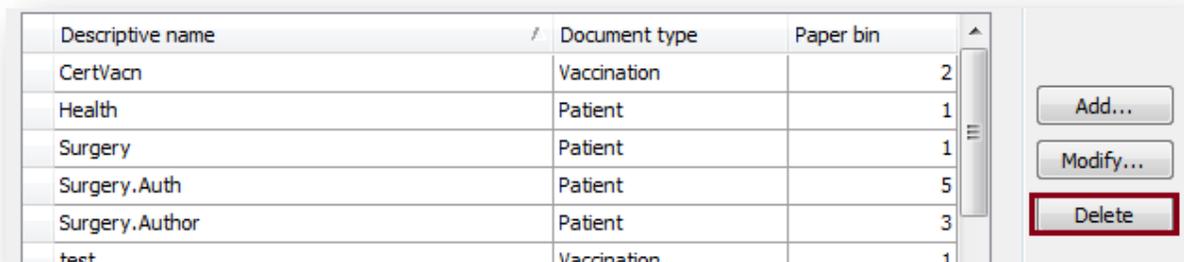
In the bottom part of the window, you can view and modify the documents. (Descriptive name for the document-file)

Language	Descriptive name	Name of the document-file
▶ French	Santé	Santé.Fr
English	Health	Health.An

Edit

Close
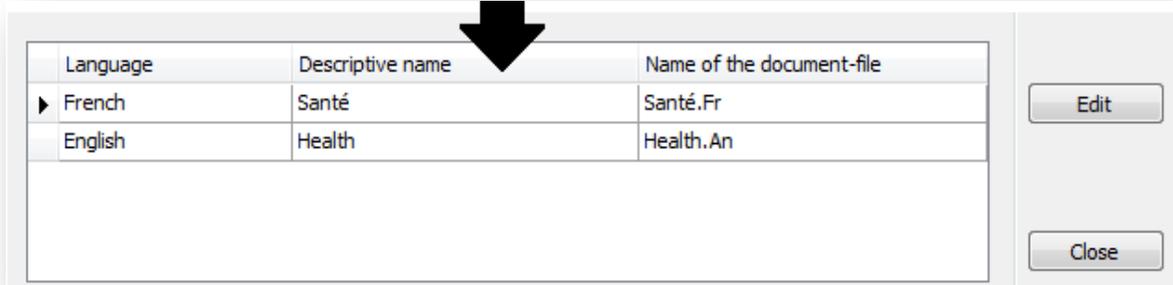
At the right of the window, you can use the buttons to **Add** documents or to **Modify** your documents.

Descriptive name	Document type	Paper bin
CertVacn	Vaccination	2
Health	Patient	
Surgery	Patient	1
Surgery.Auth	Patient	5
Surgery.Author	Patient	3
test	Vaccination	1

Add...

Modify...

Delete

You can also delete an existing document by using the **Delete** button.

Descriptive name	Document type	Paper bin
CertVacn	Vaccination	2
Health	Patient	1
Surgery	Patient	1
Surgery.Auth	Patient	5
Surgery.Author	Patient	3
test	Vaccination	1

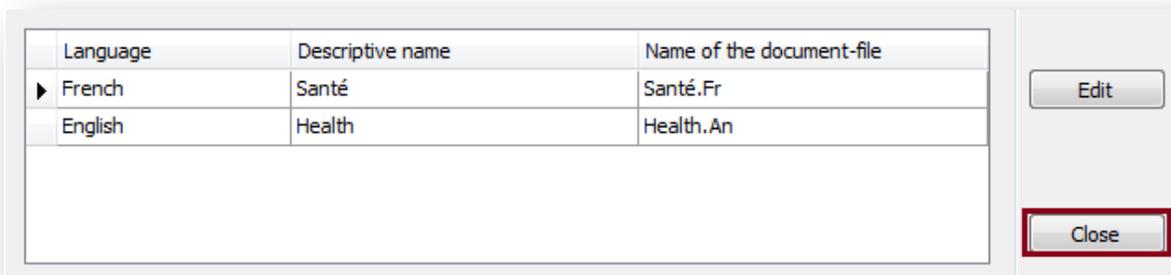Add...

Modify...

Delete

You can access the highlighted document by clicking on the **Edit** button.

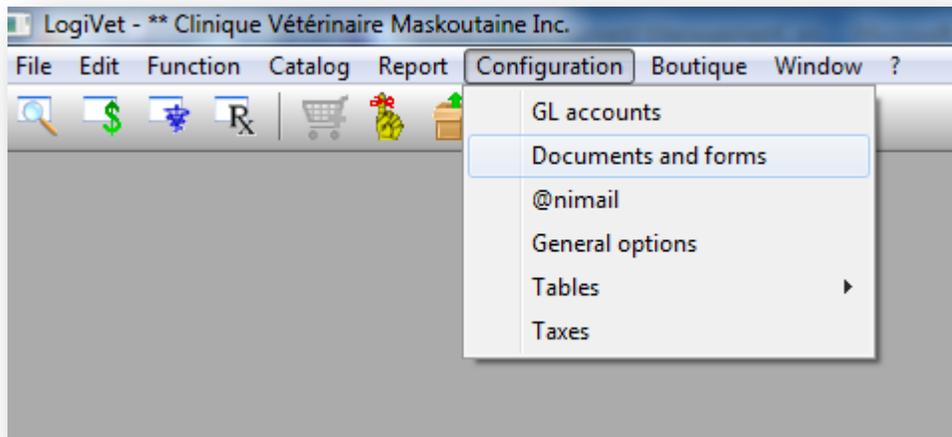The document will open in the Document Editor, in the two languages.
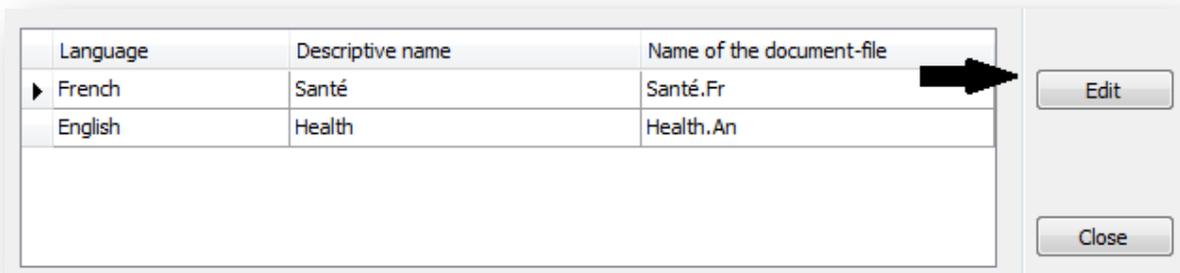
You can get back to the main screen by clicking on the **Close** button.

3. Create a New Document
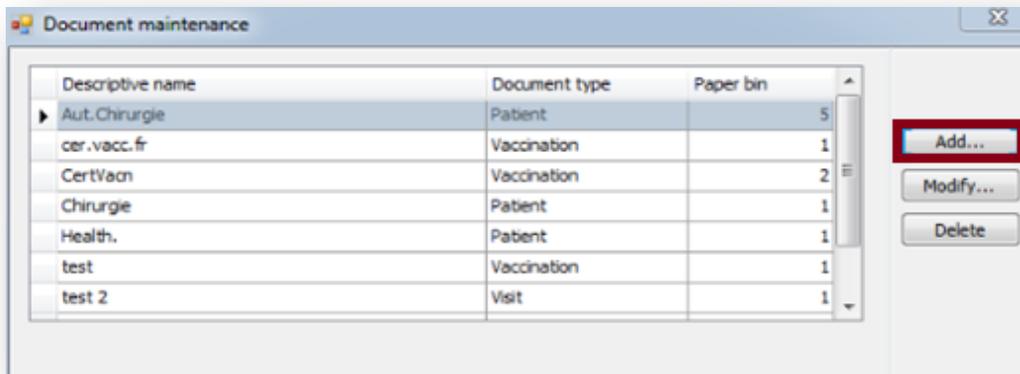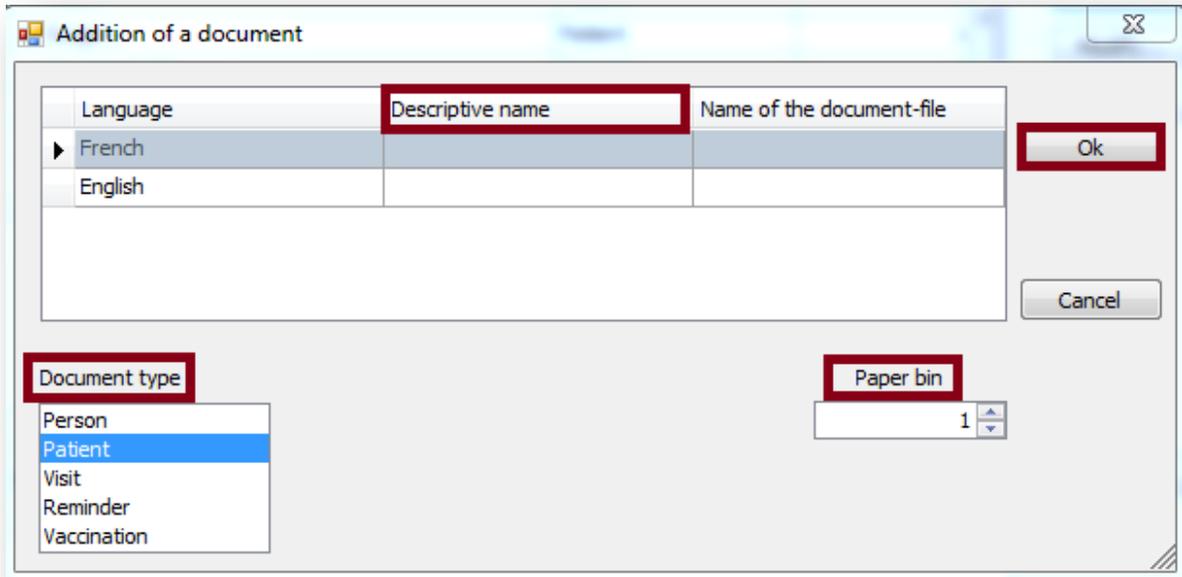
Click on **Configuration,** and then select **Documents and forms.**

The **Document maintenance** window will open; click on **Add:**

The **Addition of a document** window will open. On the English line, write the form's descriptive name; when changing cells, the name will automatically be added in the field **document-file** and will have the following extension: **.En.**

You also need to write a descriptive French name. If you only have English-speaking customers, you can use the same descriptive name you entered in the English field for the French field. If you have French-speaking and English-speaking customers, you need to enter a descriptive name in both languages.

Before you begin, you need to determine which information is required for your document:
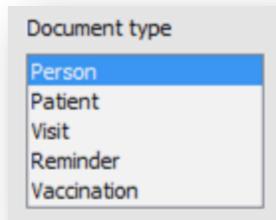
The document type also sets the location from where the document to print is visible:

Document Types	Available Merge fields	Printing available if…
Person	Customer	**Customer** is selected
Patient	Customer, patient	**Patient** is selected
Visit	Customer, patient, visit	**Visit** is selected
Reminder	Customer, patient, visit, reminder	**Reminder batches** is selected (under Function)
Vaccination	Customer, patient, visit, vaccination	**Visit** is selected

Select the Document Type and from which paper bin the document should be printed. Click on **OK**.

Your new document will open in a Document Editor window, such as the following one:
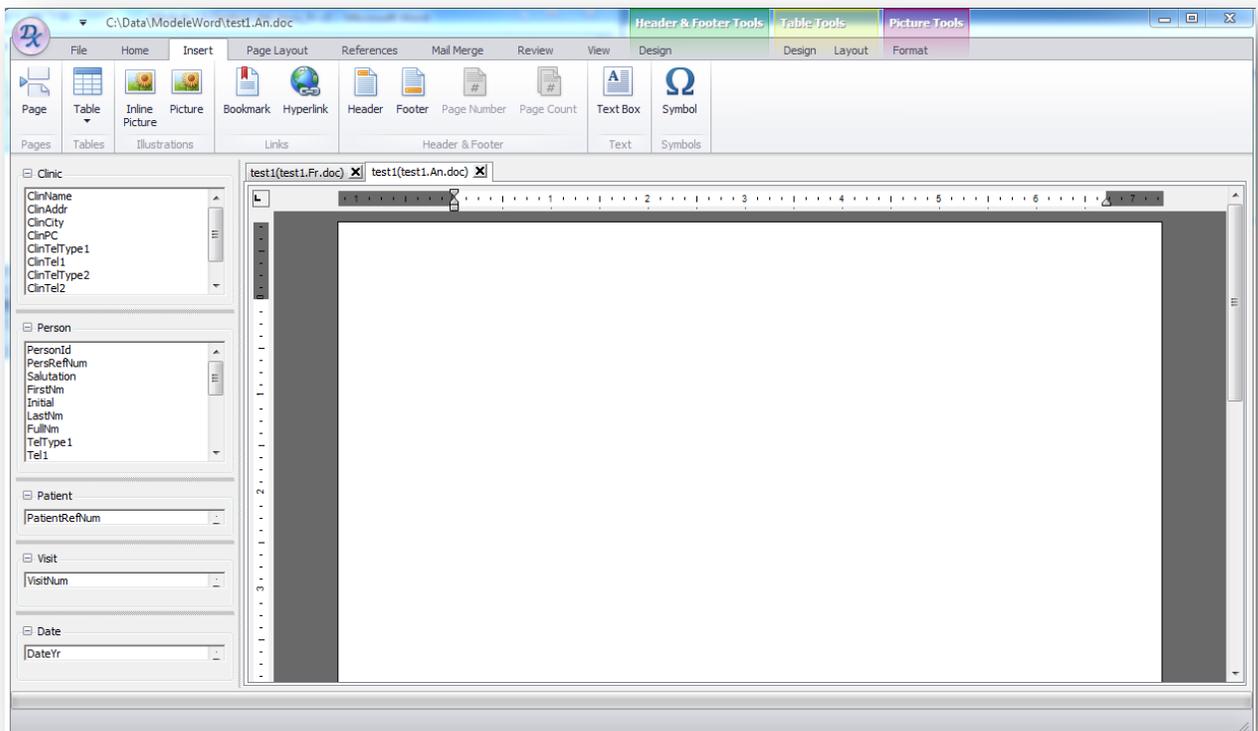
Please note that the two descriptive names will automatically open in the two languages (French and English). You can close one form by clicking on the ☒ icon (displayed at the right of a file name).
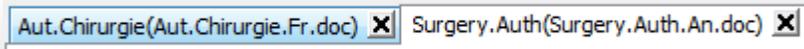
If you serve English-speaking customers only, you can leave the French document empty. If you serve both French and English-speaking customers, you will need to complete the document in both languages.

In the current document, we will add the clinic's logo. Select **Insert** in the toolbar. Click on **Insert Picture**, select your logo and click on **Open**. See the following example:
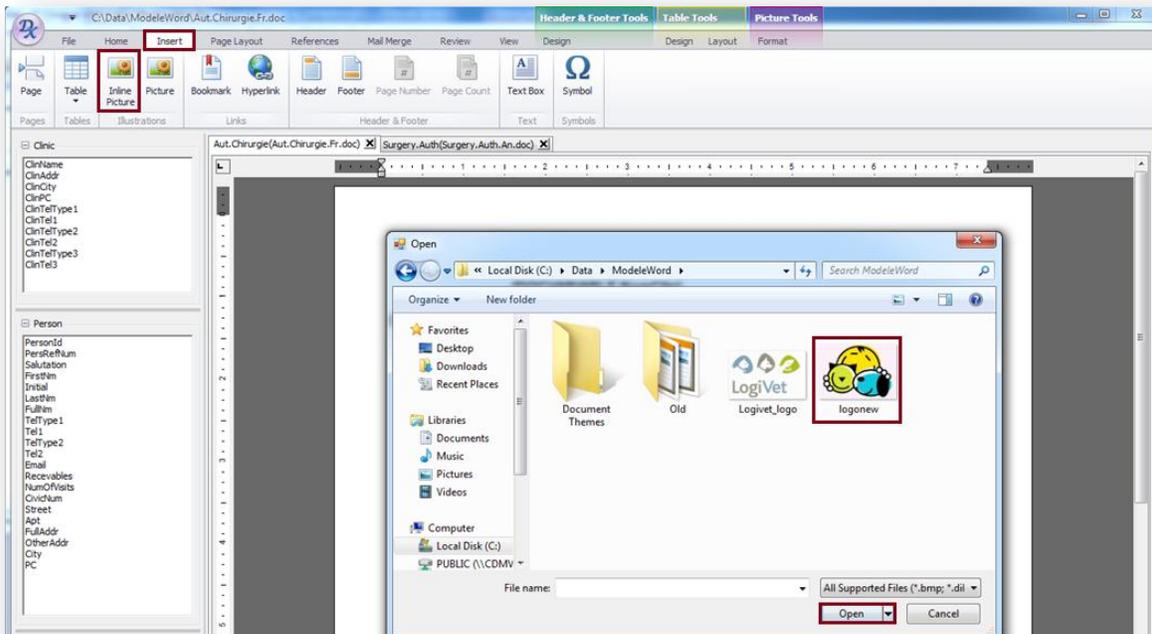
The logo will be added to the document where you positioned your cursor.
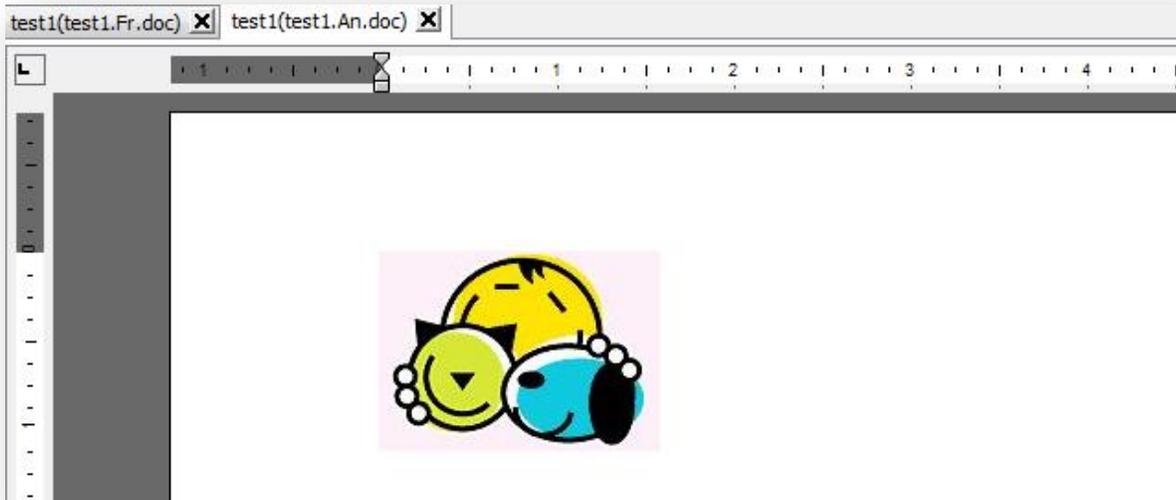
To insert your clinic's name, you have to position your cursor in the document where you want to insert the field.

Select your fields one by one in the list displayed at the left, then drag each one to the document by pressing the left button of your mouse.

The fields will be displayed as follows:

{DOCVARIABLE ClinName}
{DOCVARIABLE ClinAddr},{DOCVARIABLE ClinCity} {DOCVARIABLE ClinPC}
{DOCVARIABLE ClinTelType1}   {DOCVARIABLE ClinTelType2}

In addition to the merge fields linked to your clinic's contact information, remember to insert all required fields to complete your document such as the date, the customer's contact information, the patient's name, etc.

The following example shows the selected fields that were inserted in the text.
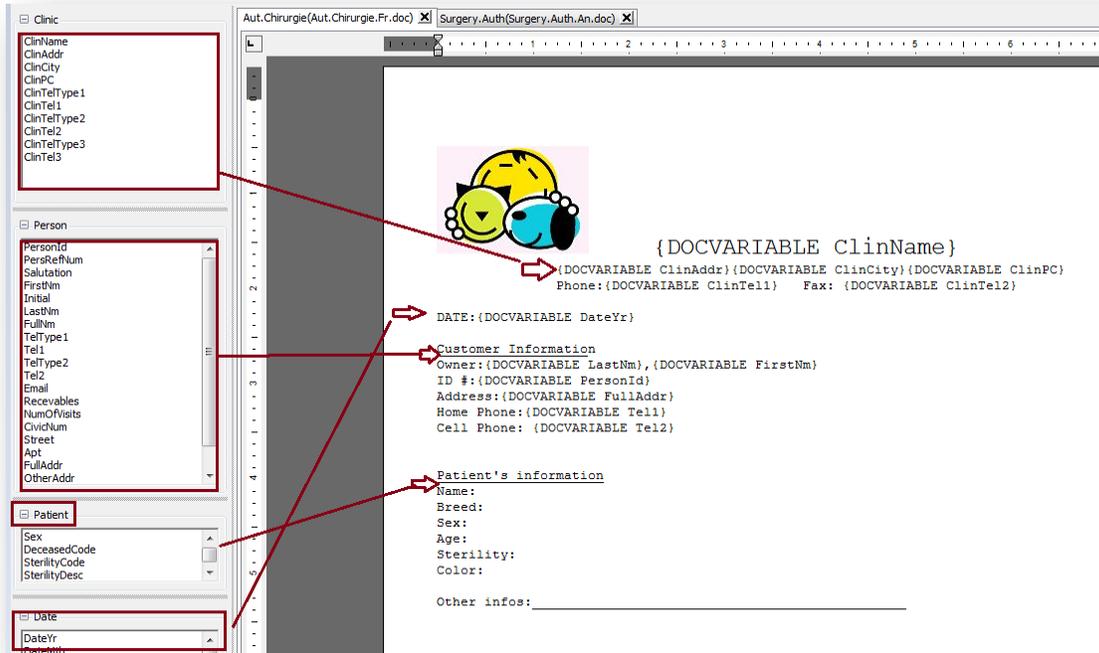
Information like the patient's name, race, sex, color and age were added. It is therefore important to select the right type of document in order to insert the required fields for your form.

Click on **Save** and then on **Close**.

Modify a Document

Click on **Configuration** and then select **Documents and forms**
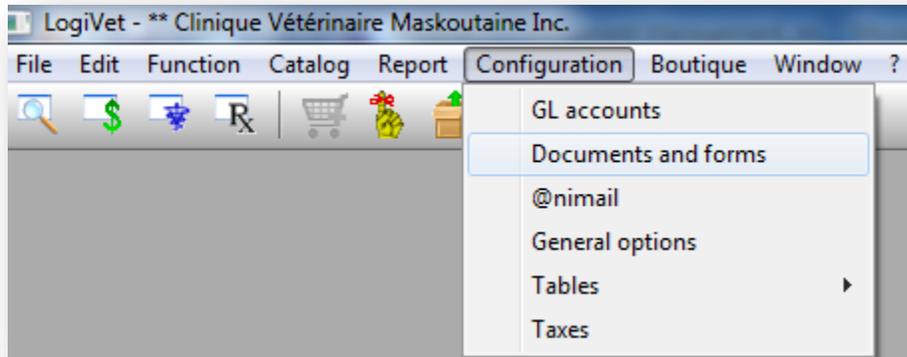
The **Document maintenance** window will open. Select your document and click on **Modify.** The **Modify a document** window will open. Here you can change the descriptive name, document type or paper bin
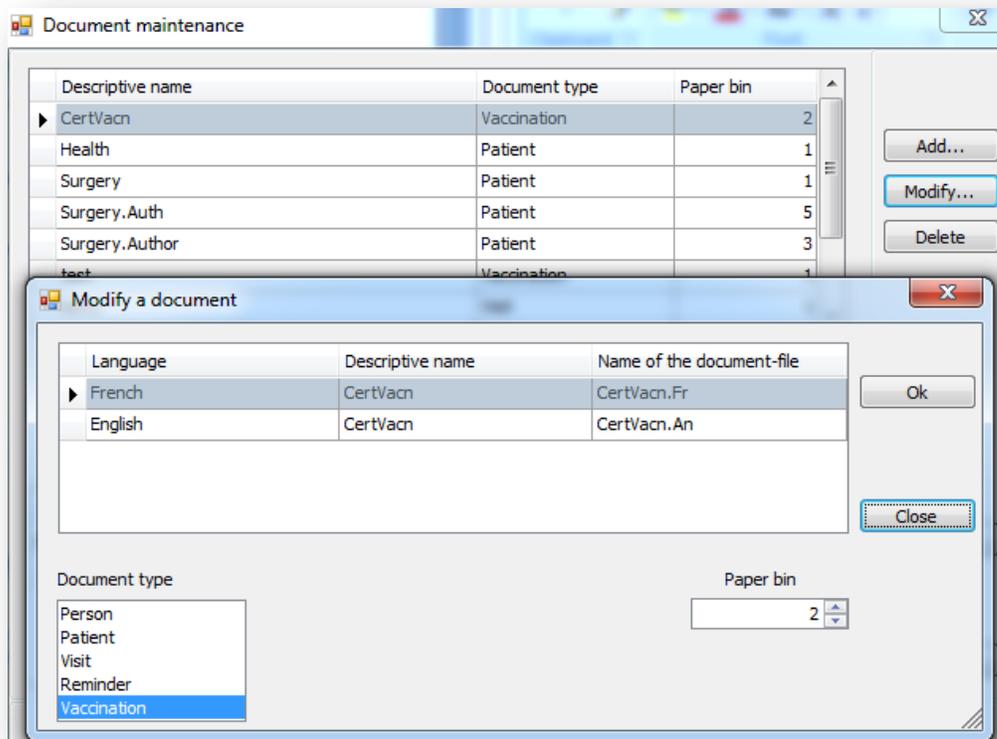
Click **OK** and your document will open in the text editor window. Alternately, select the document from the Document Maintenance window and click Edit in the lower right to go straight into the Document editor.

{DOCVARIABLE ClinName}

{DOCVARIABLE ClinAddr}{DOCVARIABLE ClinCity}{DOCVARIABLE ClinPC}
{DOCVARIABLE ClinTelType1}{DOCVARIABLE ClinTelType2}
www.vetclinic@vetmail.com

VACCINATION Certificate

The{DOCVARIABLE DateDay} , {DOCVARIABLE DateMth},{DOCVARIABLE DateYr}

ID # :	{DOCVARIABLE PersRefNum}	Name:	{DOCVARIABLE PatientName}
Owner:	{DOCVARIABLE FullNm}	Breed:	{DOCVARIABLE PriBreed}{DOCVARIABLE SecBreed}
Address:	{DOCVARIABLE FullAddr}	Sex:	{DOCVARIABLE Sex}
Phone:	{DOCVARIABLE Tel1}	{DOCVARIABLE SterilityCode}	
		Color:	{DOCVARIABLE PriColor}{DOCVARIABLE SecColor}
		Age.:	
		Weight:	{DOCVARIABLE WeightLbs}
		Rabies #:	{DOCVARIABLE RabiesNum}

To certify that as of this day I have proceeded to the annual exam of : {DOCVARIABLE PatientName}. I have vaccinated against: :

Vaccination program   **Effective**
-------------------------{DOCVARI
ABLE VacProg5}

You are then able to modify your document.

Select the required fields and drag them in your document.

The merge fields will be displayed in your documents between brackets, as shown in the following example:
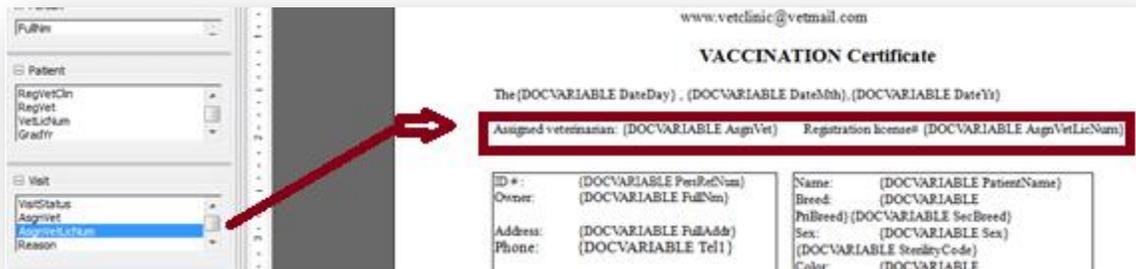
Remember to save your modifications when you are finished.

4. **Print and Add Attachments**

Printing

The document types indicate which data fields will be available to merge with a document. They also determine where the document will be available for printing in the software.

- **Person**   available when a customer is selected
- **Person, Patient**   available when an animal is selected
- **Person, Patient, Visit**   available when a visit is selected
- **Vaccination**   available when a visit is selected
- **Reminder batches**   available from the reminder batches module

From the **Search** window, select a person, a patient or a visit, and then click on the **Print** button.

The **Printing of documents and labels** window will open.

Click on the **Word document** tab. The list of available documents will be displayed.
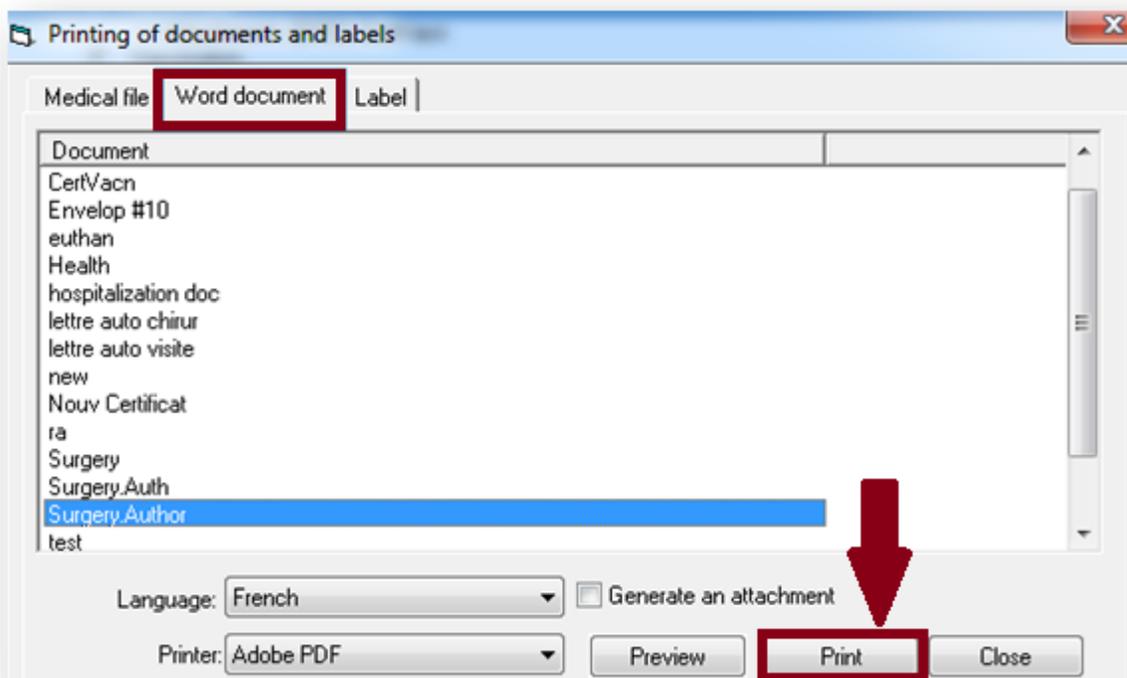
Please note that the list of available documents will vary depending on where you are in the software (on **Person**, **Patient**, **Visit** or in a medical file).

From a **Person's** file:

When you select a customer, you will only have access to the following document type: **Person**.
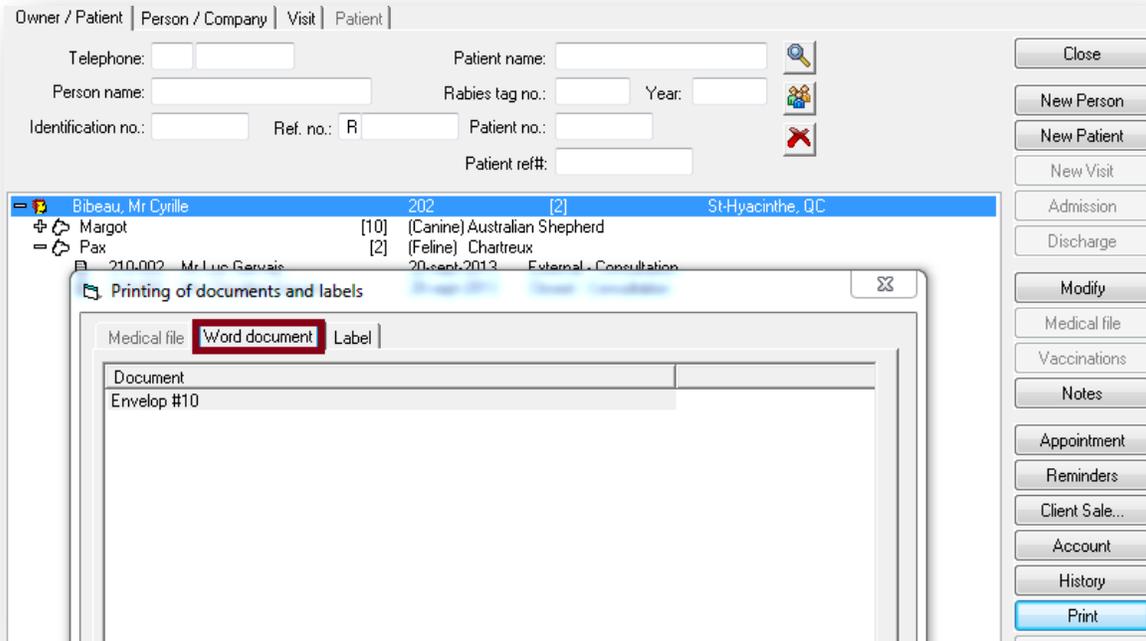
From an **Patient's** file:

When you select an animal, you will have access to the following document types:
Person and **Patient**.
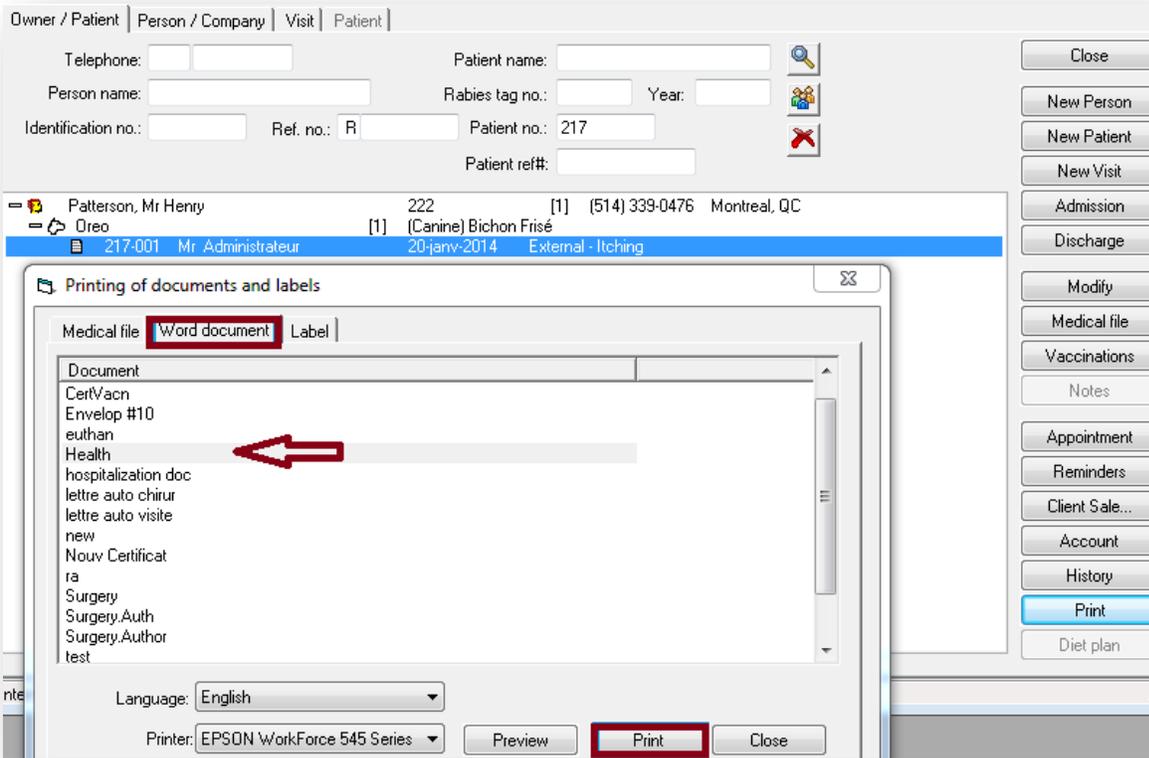
From a **Visit** in medical file:

When you select a visit, you will have access to the following document types:
Person, Patient and **Visit**.
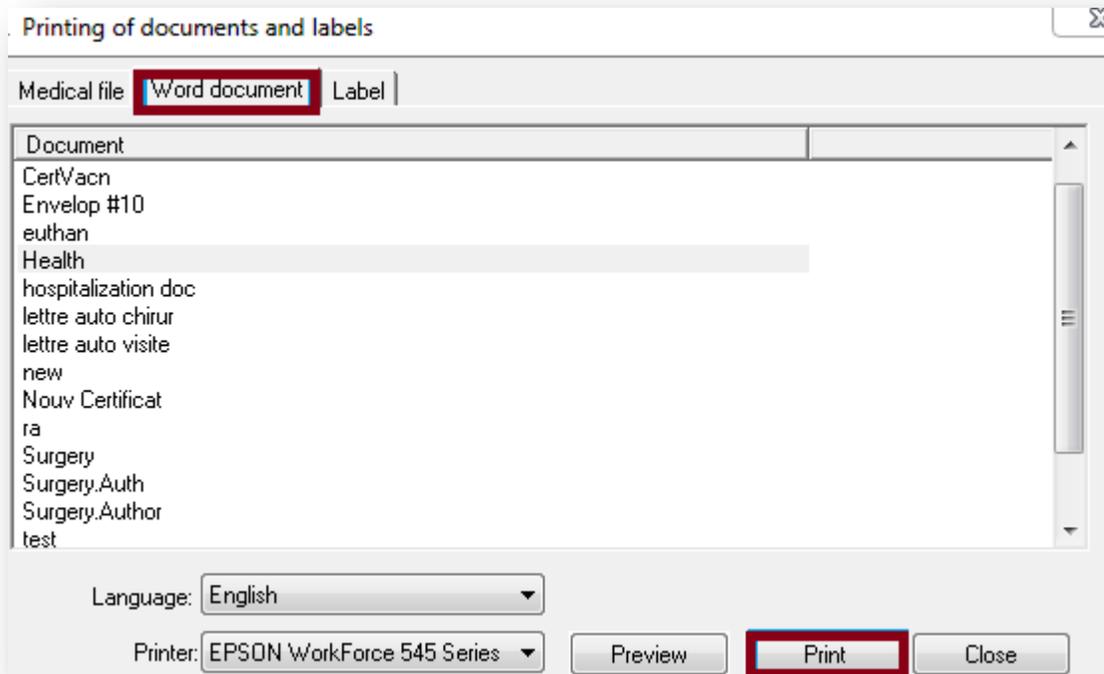
In a **Medical file**:

When you select a line in the medical file, you will have access to the same document types (**Person, Patient and Visit**).
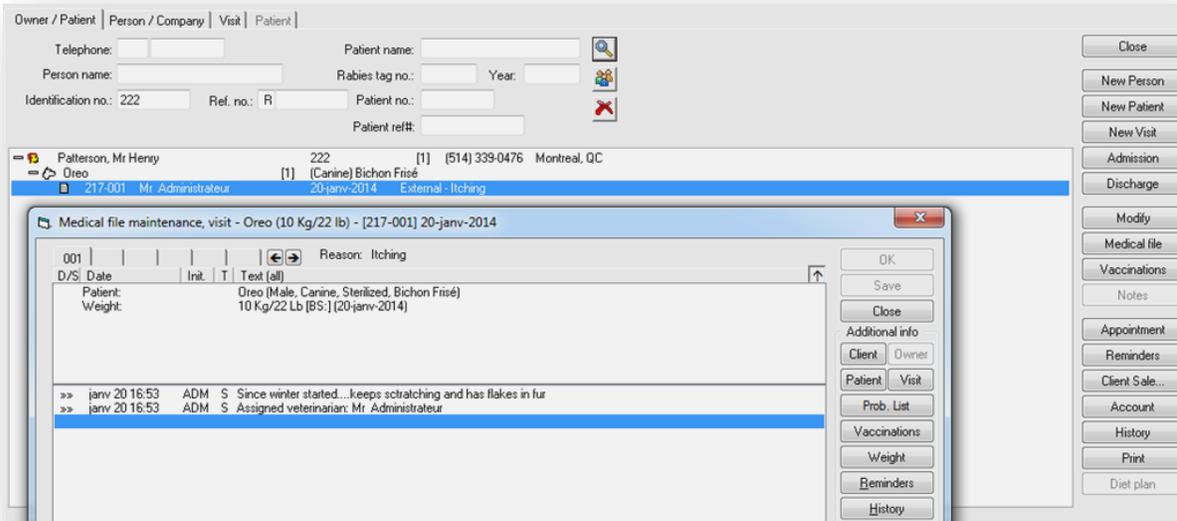
Once you select your document, click on **Print**.

(The **Preview** button displays the document to print, enabling you to customize/modify the document prior to printing. These changes do not overwrite the master document, rather they are only reflected on the current print request).

In the **Visit list**:

Please note that you also can go through the visits list window to access a medical file by double-clicking on a patient. From there, you will be able to print your document.

Select **Display the visit list window**.
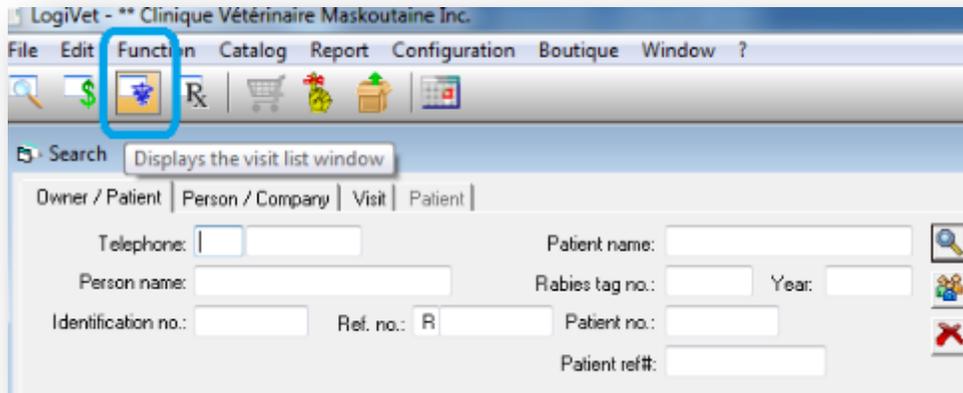
Select the patient line and double-click on it. Once in the medical file, click on the **Print** button and select your document in the list.
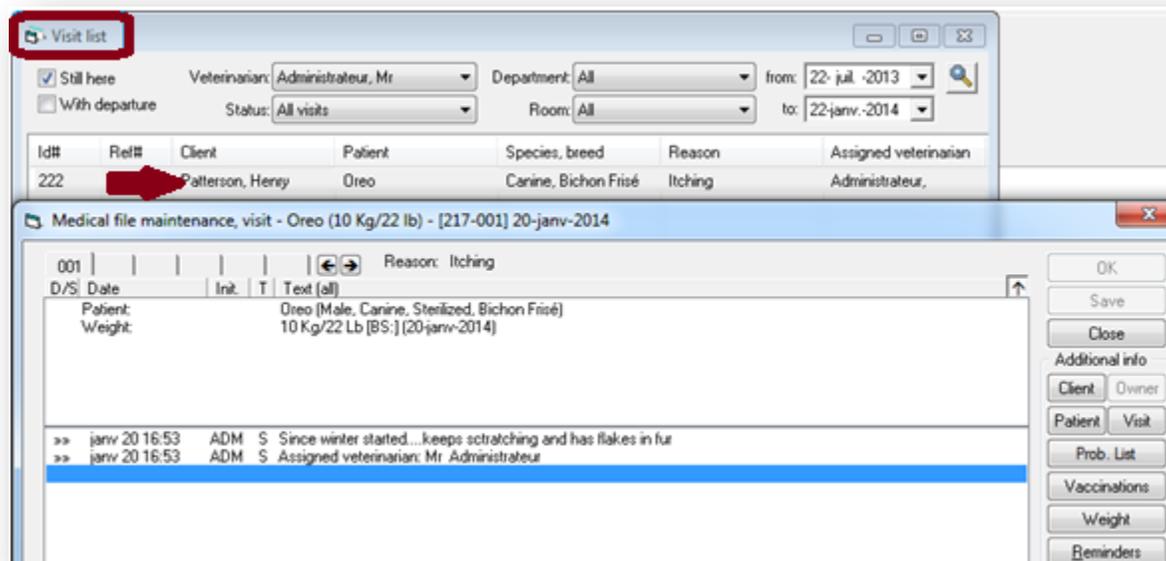
Reminder batches

In the **Function** menu**,** select **Reminder batches.**
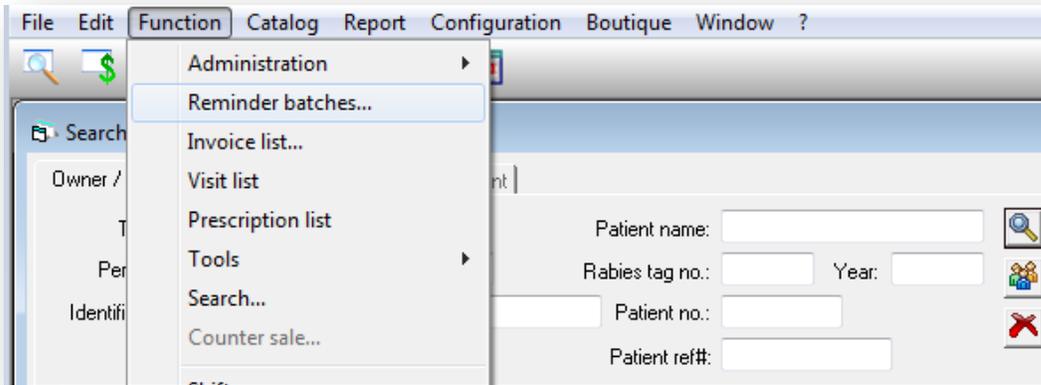
The **Reminder batch/Mail merge** window will be displayed:
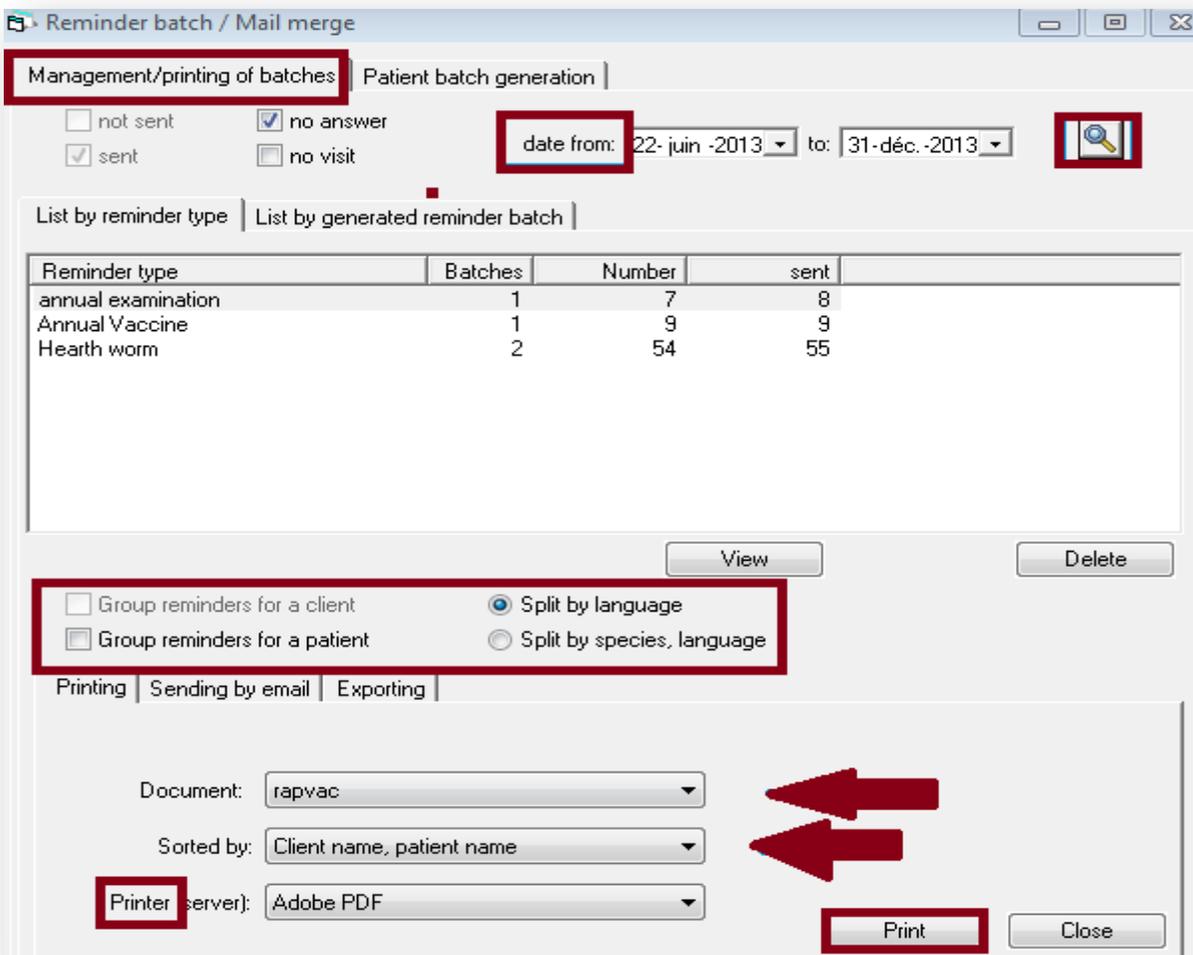
In the **Management/printing of batches** window:

Click in the box to indicate which type of reminder it is: **not sent**, **no answer**, etc.

Select the dates and click on the search icon.

The reminder batches will be displayed by type. Select the type of reminder batch you wish to print.

On the printing tab, select one of the following options:

Group reminders for a client: a customer that owns more than one animal will receive only one reminder document for all their animals.

Group reminders for a patient: the owner of an animal for which more than one reminder of the same type is required will receive only one document.

Click on one of these two buttons: **Split by language** or **Split by species, language**.

Select the document type, the sort type and the printer.

Click on **Print**.

Insert a Document or a Form as an Attachment

In a medical file, you can add a customized document as an attachment.

From a patient's medical file, single-click on one of the lines.

Click on **Print**.
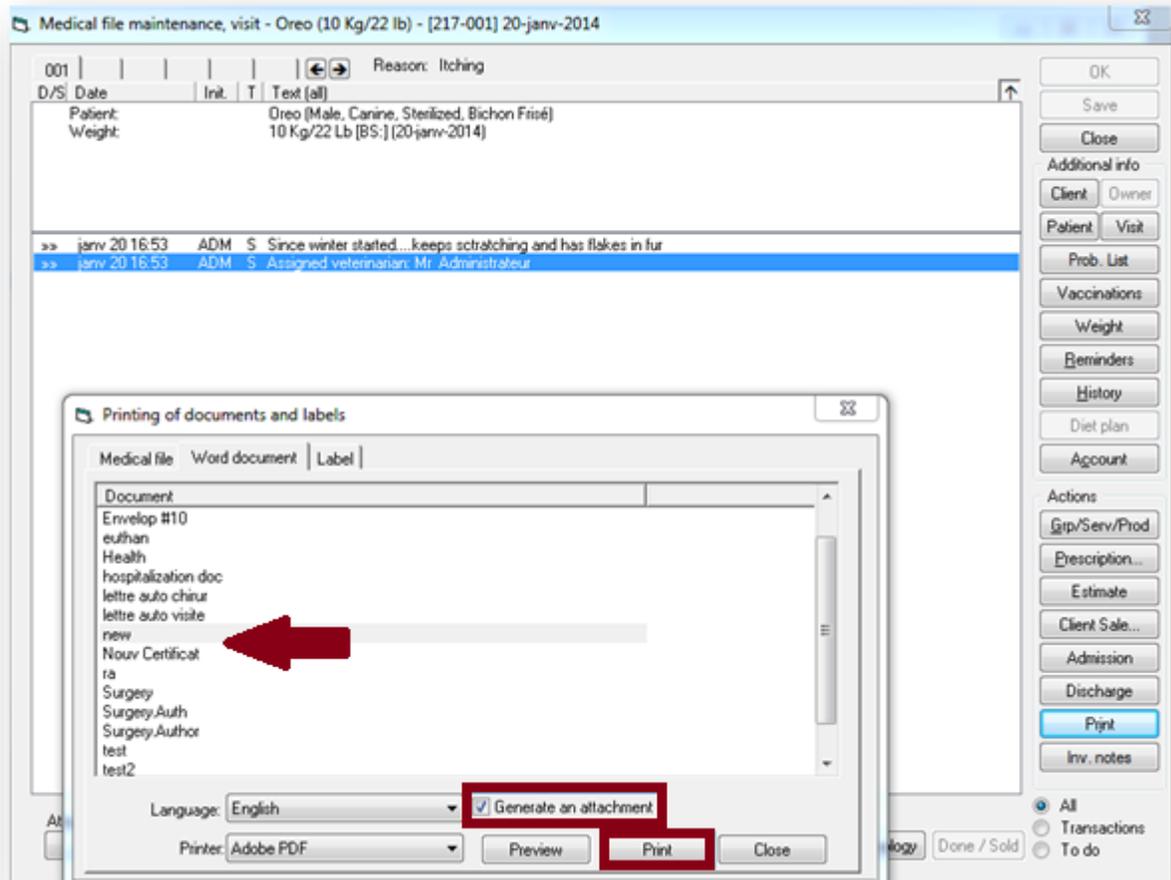
Select a document, then click in the box **Generate an attachment**.

Click on **Print**.

The attachment will be added to the patient's medical file.

(To view the attachment, double-click directly on it.)
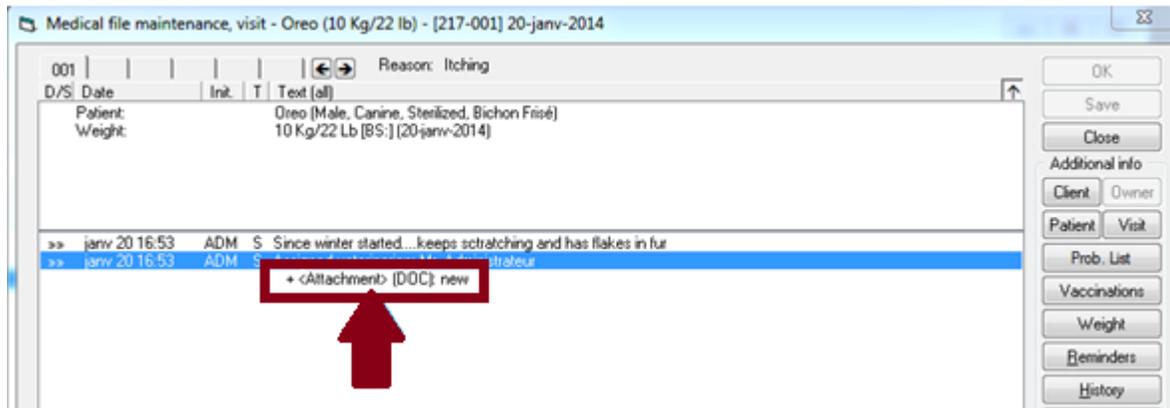
5. Text Edit Functions

Here are the text edit functions:

File:
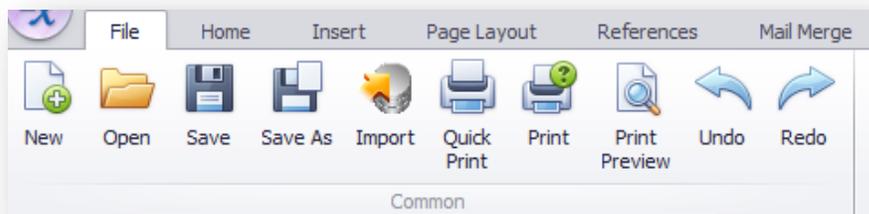
New: Create a new document. Please use the window called **Documents and forms** to add a new document to be linked to your software.

Open: Open the find files window where your files are stored on your computer.

Save: Save a document.

Save as: Save a document in a different file name or in a different location.

Import: Import a file from which you will copy the information and paste it in the active document.

Quick Print: Send a document directly to the default printer without modifying it.

Print Preview: Display the document before printing.

Undo: Cancel the changes made to a document.

Redo: Restore the changes made.

Home:
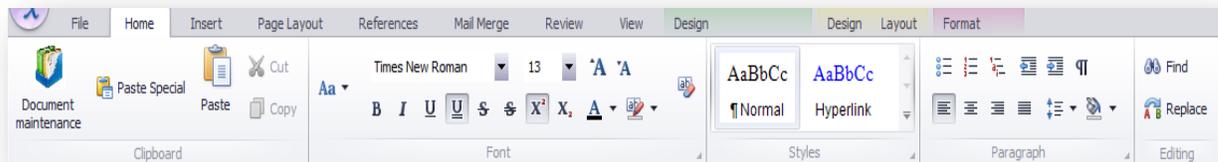
Clipboard:
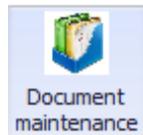
Document maintenance: Open the **Document maintenance** window in order to add documents to the text editor; from there, you are able to work on more than one document at a time or copy-paste text from another open document.

Paste Special: To paste selection in a different format than the original version.
Paste: To paste the contents.
Cut: Cut the selection and put it elsewhere in the document.
Copy: Copy selection.

Font: To modify the font, the style, the color, etc.

Styles: To display the Style window.

Paragraph: To change the indents, the spacing, etc.

Editing: To search and replace words in a document. It is a correction tool.

Insert:
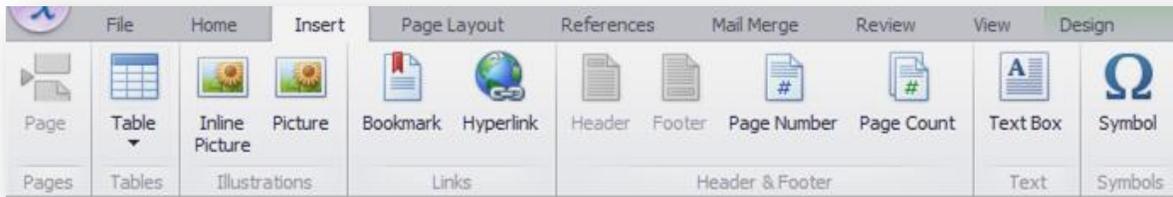
Pages: To insert a page break.

Tables: To insert a table in the document.

Illustrations: To insert an image or a picture (from saved files in the computer).

Links: To insert a bookmark or a hyperlink (linked to the Web).

Header & Footer: To insert a space for the header and the footer.

Text: To insert a text box (frame) where the cursor is positioned.
Note: You cannot add a merge field in a text box. You need to add the text manually.

Symbols: To insert symbols in a text (ex. ☐ for a checkbox).

Page Layout:
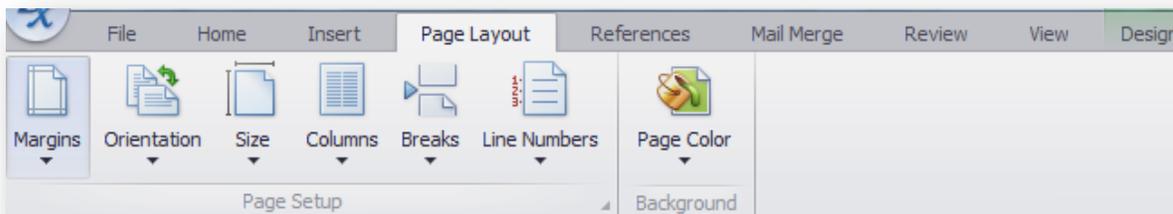
Margins: Select margins sizes for the entire document or the current section.

Orientation: Switch the pages between portrait and landscape layouts.

Size: Choose a paper size for the current section.

Columns: Split text into two or more columns.

Breaks: Add page, section or column breaks to the document.

Line Numbers: Add line numbers in the margin.

Page Color: Choose a color for the background of the page (choice of colors).

References:
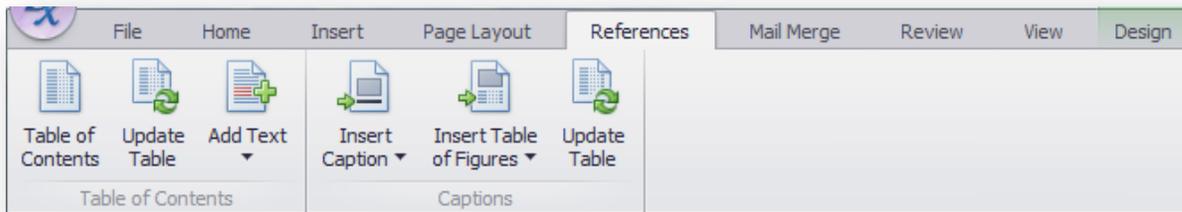
Table of Contents: Add a Table of Contents to the document. Once you have added a Table of Contents, click the Add Text button to add entries to the table.

Update Table: Update the Table of Contents so that all the entries refer to the correct page number.

Add Text: Add the current paragraph as an entry in the Table of Contents.

Insert Caption: Add a caption that appears below an object or an image to describe it.

Insert Table of Figures: Insert a Table of Figures into the document. A Table of Figures includes a list of all of the figures, tables or equations in the document.

Update Table: Update the Table of Figures to include all of the entries in the document.

Mail Merge:
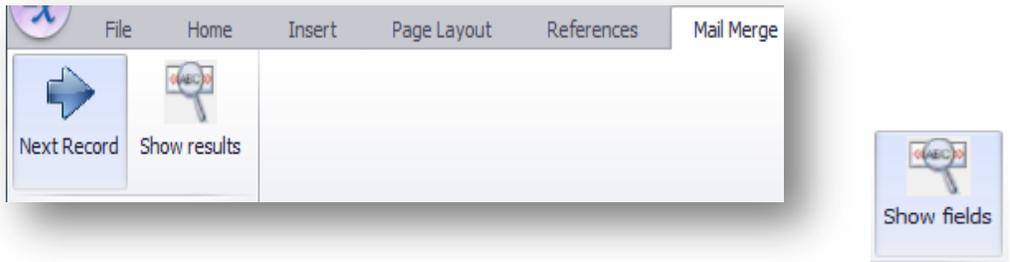
Next record: This button will insert a merge field where the cursor is positioned in the document. When this button is inserted between two merge fields, it skips to the next record until you reach the last recorded merge field.

Show results: When text is displayed under this button, the current document will merge with the merge fields. The button will change to: Show fields.

Show fields: This button is used in the text of the current document, which will display all merge fields that did not merge.

Review:
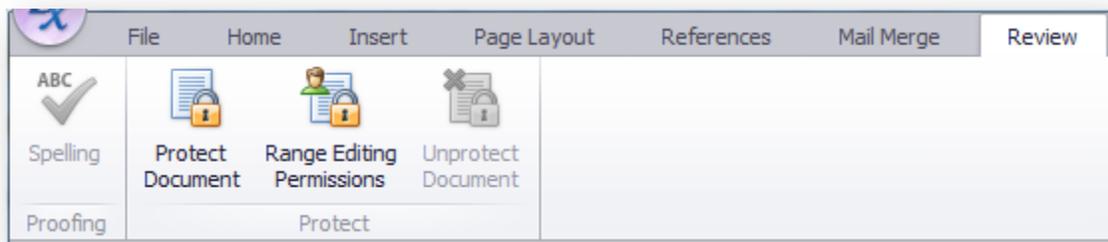
Spelling: Check the spelling and grammar of text in the document.

Protect Document: Help restrict people from making modifications to the document by specifying a password.

Range Editing Permissions: Allow editing the types of restrictions enforced in the document.

Unprotect Document: Removes the protection that was activated for the document.

View:
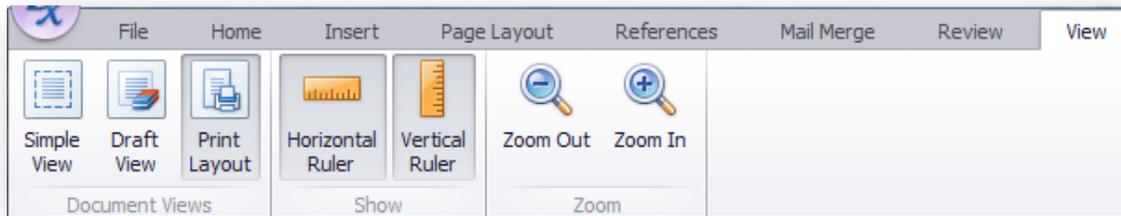
Simple View: View the document as a regular memo. This display does not show the page layout to draw attention to or edit the text.

Draft View: View the document as a draft to quickly edit the text. Certain elements of the document such as headers and footers will not be visible in this view.

Print Layout: View the document as it will appear on the printed page.

Horizontal Ruler: View the horizontal ruler. Used to measure and line up objects in the document.

Vertical Ruler: View the vertical ruler. Used to measure and line up objects in the document.

Zoom Out: Zoom out the document.

Zoom In: Zoom in the document.

Design:
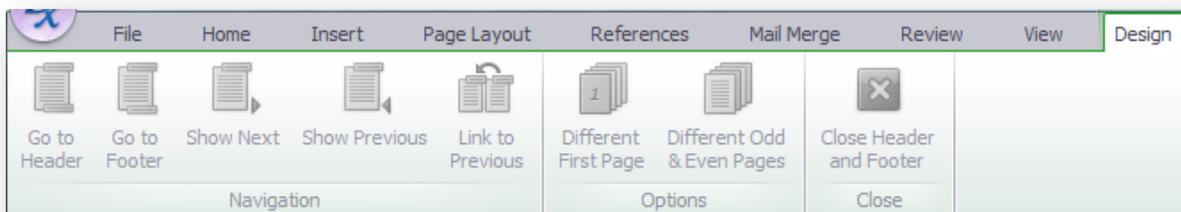
Go to Header: Activate the header on this page so that you can edit it.

Go to Footer: Activate the footer on this page so that you can edit it.

Show Next: Navigate to the next section's header or footer.

Show Previous: Navigate to the previous section's header or footer.

Link to Previous: Link to the previous section so that the header and footer in the current section contains the same content as the previous section.

Different First Page: Specify a unique header and footer for the first page of the document.

Different Odd & Even Pages: Specify that odd-numbered pages should have a different header and footer from even-numbered pages.

Close Header and Footer: Close the header and footer tools. You can also double-click the document area to return to editing it.

Design:
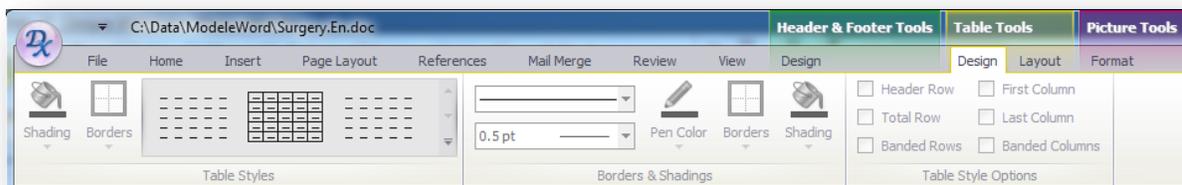
Shading: Color the background behind the selected cells.

Borders: Customize the borders of the selected cells.

Table: Insert a new table into the document, modify a table or delete it.

Line Style: Change the style of the line used to draw borders.

Line Weight: Change the width of the line used to draw borders.

Pen color: Change the pen color.

Shading: Color the background behind the selected cells.

Table Style Options: Display special formatting for the columns and rows of the table.

Layout:
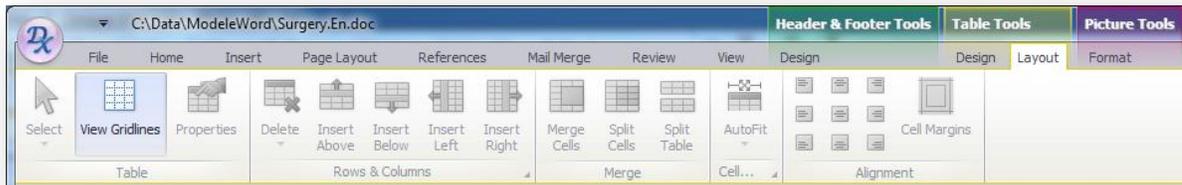
Select Table: Select the current cell, row, column, or entire table.

View Table Gridlines: Show or hide the gridlines within the table.

Table Properties: Open the Table Properties dialog box to change advanced table properties, such as indentation and text wrapping options.

Delete Table: Delete rows, columns, cells, or entire table.

Insert Rows Above: Add a new row directly above the selected row.

Insert Rows Below: Add a new row directly below the selected row.

Insert Columns to the Left: Add a new column directly to the left of the selected column.

Insert Columns to the Right: Add a new column directly to the right of the selected column.

Merge Cells: Merge the selected cells into one cell.

Split Cells: Split the selected cells into multiple new cells.

Split Table: Split the table into two tables. The selected row will become the first row of the new table.

AutoFit: Automatically resize the column widths based on the size of the text in them. You can set the table width based on the window size or convert it back to use fixed column widths.

Text Direction: Change the text direction within the selected cell.

Cell Margins: Customize cell margins and the spacing between cells**.**

Format:

Shape Fill: Fill the selected shape with a solid color.

Shape Outline: Specify the color for the outline of the selected shape.

Wrap Text: Change the way the text wraps around the selected object. To configure the object along with the text so that it moves along with the text around it, select "In-line with text".

Position: Position the text box on the page. Text is automatically set to wrap around it.

Bring to Front: Bring the selected object in front of all other objects so that no part of it is hidden behind another object.

Send to Back: Send the selected object behind all other objects so that it is hidden behind them.

Merge Fields:

Merge fields are found to the left of the text editor. To insert a merge field in your document, position your cursor where you want to insert it, select the merge field and drag it to the document.
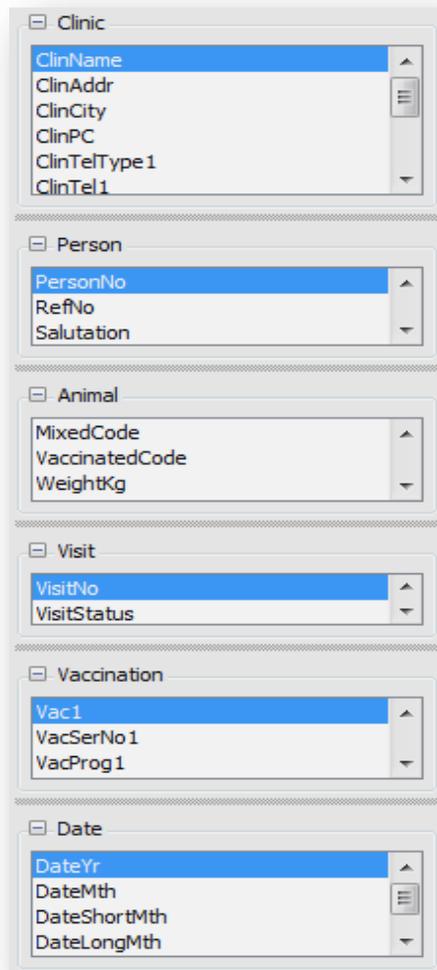
You can resize the lists by dragging the separator between them up or down.

Appendix

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 Phone Number Type	ClinTelType3
10	Third Phone Number	ClinTel3

Person Information

Item	Description of merge field	Merge field
1	I.D. Number	PersonId
2	Reference Number	PersRefNum
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 Adress	Email
13	Amount of Receivables	Recevables
14	Number of Visits	NumOfVisits
15	Civic Number	CivicNum
16	Street Name	Street

17	Apartment Number	Apt
18	Complete Address	FullAddr
19	Second Line Address	OtherAddr
20	City and Province	City
21	Postal Code	PC

Patient Information

Item	Description of merge field	Merge field
1	I.D. Number	PatientID
2	Patient Name	PatientName
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 in Number	DOBMth
17	Month of Birth in Short Text	DOBShortMth
18	Month of Birth in Long Text	DOBLongMth
19	Date of Birth	DOBDay
20	Year of Death	DODYr
21	Month of Death in Number	DODMth
22	Month of Death in Short Text	DODShortMth
23	Month of Death in Long Text	DODLongMth

24	Date of death	DODDay
25	Civic License Number	CivicLicNum
26	Year of Civic License Number	CivicLicYr
27	Rabies Tag Number	RabiesNum
28	Year of Civic Rabies Tag Number	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
37	Reference (Microchip) Number	PatientRefNum

Visit Information

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

| 19 | Visit Departure Date Month Long Text | VisitDepartDateLongMth |
| 20 | Visit Departure Date Day | VisitDepartDateDay |

Vaccination Information

Item	Description of merge field	Merge field
1	Vaccine description 1	Vac1
2	Vaccine serial number 1	VacSerNum1
3	Vaccine program description 1	VacProg1
4	Vaccination effective date 1	VacEffDate1
5	Next vaccination date 1	NextVacDate1
6	Vaccine description 2	Vac2
7	Vaccine serial number 2	VacSerNum2
8	Vaccine program description 2	VacProg2
9	Vaccination effective date 2	VacEffDate2
10	Next vaccination date 2	NextVacDate2
11	Vaccine description 3	Vac3
12	Vaccine serial number 3	VacSerNum3
13	Vaccine program description 3	VacProg3
14	Vaccination effective date 3	VacEffDate3
15	Next vaccination date 3	NextVacDate3
16	Vaccine description 4	Vac4

17	Vaccine serial number 4	VacSerNum4
18	Vaccine program description 4	VacProg4
19	Vaccination effective date 4	VacEffDate4
20	Next vaccination date 4	NextVacDate4
21	Vaccine description 5	Vac5
22	Vaccine serial number 5	VacSerNum5
23	Vaccine program description 5	VacProg5
24	Vaccination effective date 5	VacEffDate5
25	Next vaccination date 5	NextVacDate5
26	Vaccine description 6	Vac6
27	Vaccine serial number 6	VacSerNum6
28	Vaccine program description 6	VacProg6
29	Vaccination effective date 6	VacEffDate6
30	Next vaccination date 6	NextVacDate6
31	Vaccine description 7	Vac7
32	Vaccine serial number 7	VacSerNum7

33	Vaccine program description 7	VacProg7
34	Vaccination effective date 7	VacEffDate7
35	Next vaccination date 7	NextVacDate7
36	Vaccine description 8	Vac8
37	Vaccine serial number 8	VacSerNum8
38	Vaccine program description 8	VacProg8
39	Vaccination effective date 8	VacEffDate8
40	Next vaccination date 8	NextVacDate8
41	Vaccine description 9	Vac9
42	Vaccine serial number 9	VacSerNum9
43	Vaccine program description 9	VacProg9
44	Vaccination effective date 9	VacEffDate9
45	Next vaccination date 9	NextVacDate9
46	Vaccine description 10	Vac10
47	Vaccine serial number 10	VacSerNum10
48	Vaccine program description 10	VacProg10
49	Vaccination effective date 10	VacEffDate10
50	Next vaccination date 10	NextVacDate10
51	Vaccine description 11	Vac11
52	Vaccine serial number 11	VacSerNum11
53	Vaccine program description 11	VacProg11
54	Vaccination effective date 11	VacEffDate11
55	Next vaccination date 11	NextVacDate11
56	Vaccine description 12	Vac12

57	Vaccine serial number 12	VacSerNum12
58	Vaccine program description 12	VacProg12
59	Vaccination effective date 12	VacEffDate12
60	Next vaccination date 12	NextVacDate12

Reminder Information

Item	Description of merge field	Merge field
1	Reminder Message	RmdMsg
2	Year of Reminder	RmdYr
3	Month of Reminder	RmdMth
4	Month in Short Text of Reminder	RmdShortMth
5	Month in Long Text of Reminder	RmdLongMth
6	Date of Reminder	RmdDay

Date Information

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

Vaccination Certificate (example):

Clinique Vétérinaire Maskoutaine
14 avenue Avril, St-Hyacinthe, QC   J2T 3S6
(450)771-2368
Vaccination Certificate

February 27, 2014

File :	3456	Name:	Lolitta
Owner:	Mr Richard Houle	Species:	Bichon
Address:	123, Blanchard	Sex:	Female Altered
	St-Hyacinthe, QC, J2T 3S6	Color:	White Brown
		D.O.B.:	November 8, 2012
		Weight:	4kg
		Rabies Tag #:	34343434

This is to certify that on this date I have examined Lolitta . I have vaccinated against:

Vaccin	**Effective**	**Reminder**	**Vaccin**	**Effective**	**Reminder**
Canine Rabies Annual	4 Mar , 2014	4 Mar , 2015	DAPP Annual	4 Mar , 2014	4 Mar , 2015

Dr Fred Desmarais : _____ dvm