# Creating a Report Template

Overview

This guide provides a brief overview on Creating a Report Template within the Medical-Objects Explorer (Meridian).

If you require any assistance with the installation or configuration, or if you have any questions, please contact the Medical-Objects Helpdesk on (07) 5456 6000.
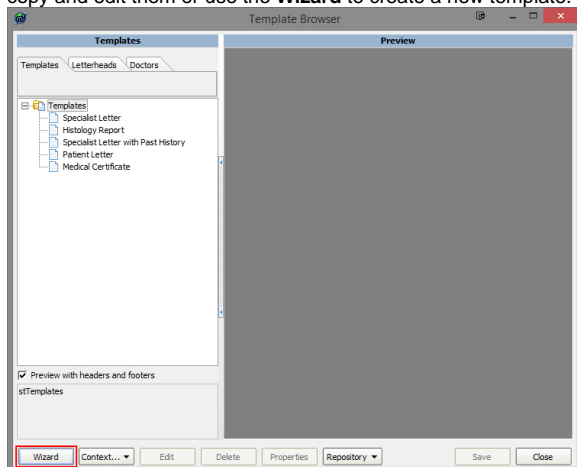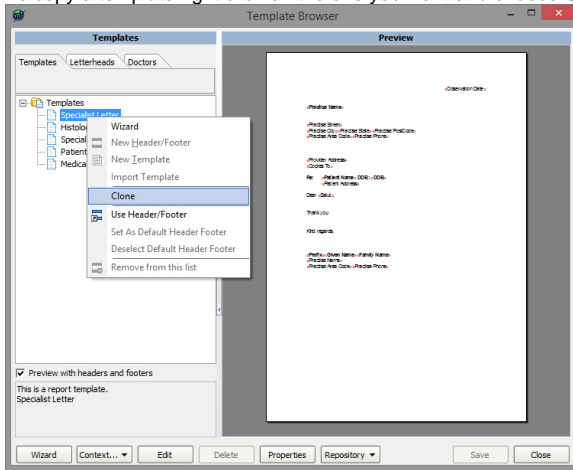
Creating your template

1. Go to **Tools** --> **Manage Templates**
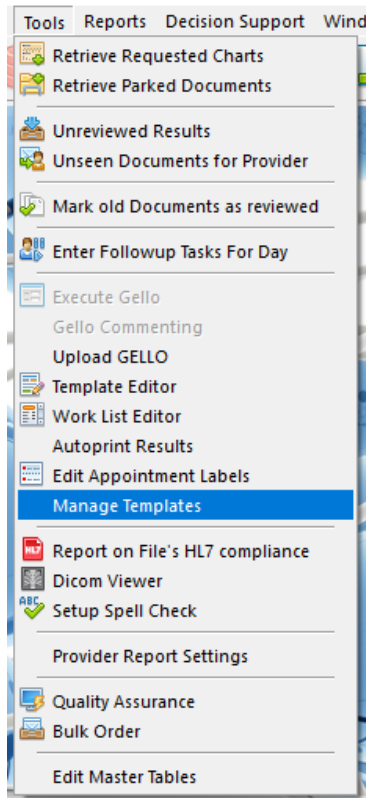
2. In the Template Browser you will see a list of predefined templates. You can either use these, copy and edit them or use the **Wizard** to create a new template.

3. To copy a template right click on the one you want and choose **Clone.**

4. You can then name the template you just created. In the example below it has been called **"General Letter".** To edit the details of the template select the template you want to edit and then choose the **Edit** button on the bottom of the active screen.
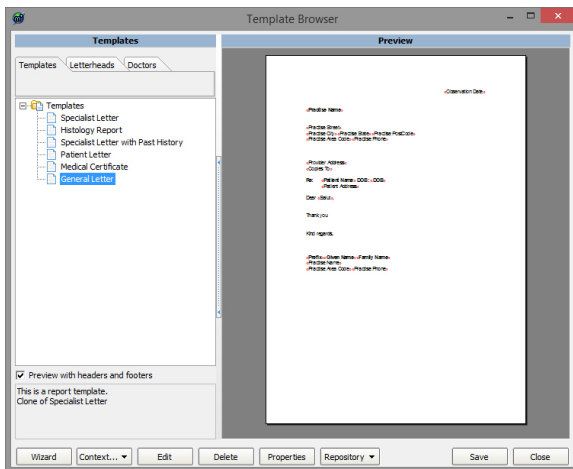

5. In the **Write** window you can change the format and content of your template. Merge Fields are indicated by **<< >>** braces. Do not edit what is in these fields as it will effect the fields being filled when you use the template to write a report. You can add extra fields but choosing **Insert --> Insert Merge Field.**
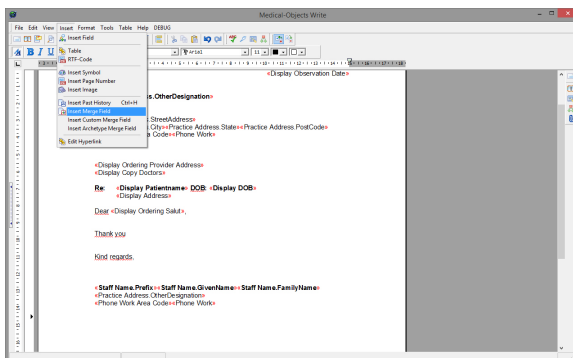
6. There are multipe merge fields that can be chosen from the list. Please note that depending on what information is passed to the template when writing a report they may not be filled.
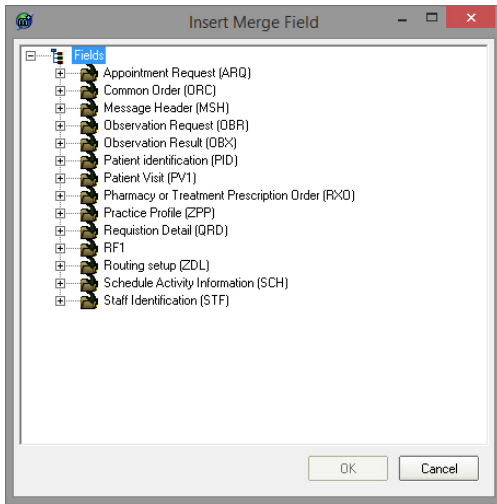
7. Once you are happy with your template choose **File** --> **Save and Close.** When closing the subsequent window if it asks if you want to save your changes please ensure that you choose **yes** to save your work.
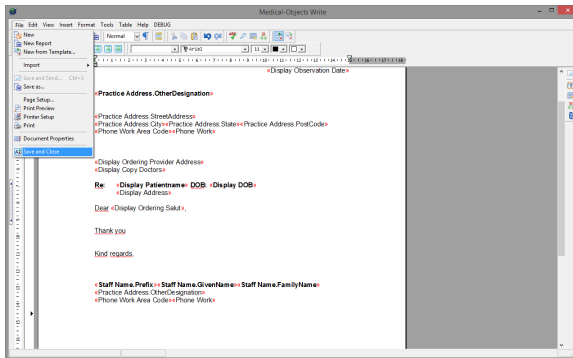

Loading the templates to your server for use by other Explorers

1. To load the templates you have created to your server for use by other Explorers choose **Repository** --> **Upload All Templates to Server.** Close any subsequent windows that open.
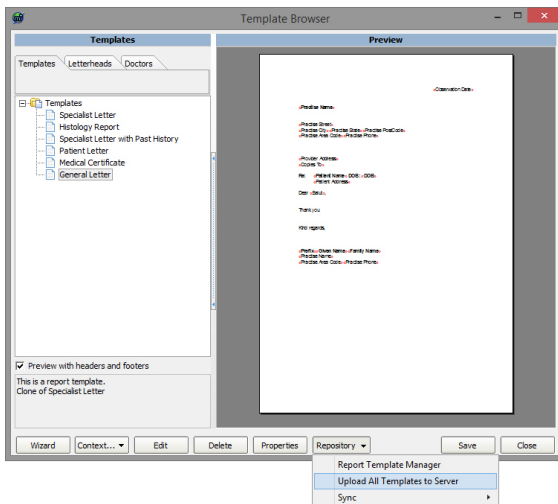

2. On any other machines that you want the templates you have created on they will have to be downloaded from the server. Go to the **Repository** button and choose **Sync** --> **Sync from**
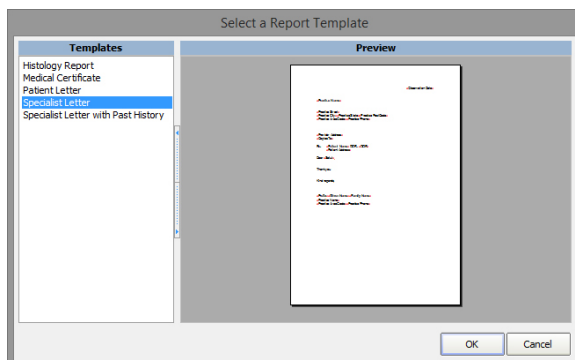
Local Server
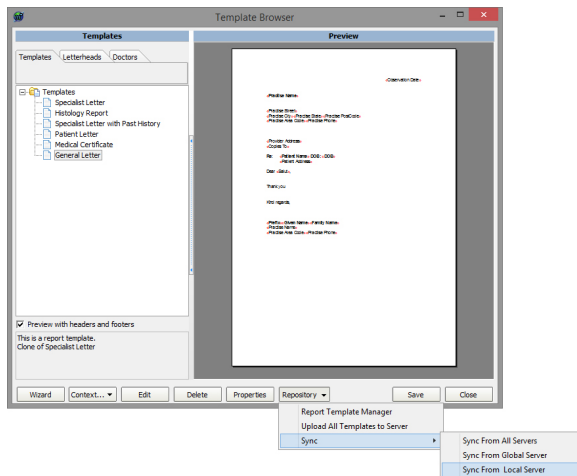
Writing your report with the template you created

1. To create a message from your template go to **Create Document** then either **New Patient** or **Current Patient** then **Document from Template.**
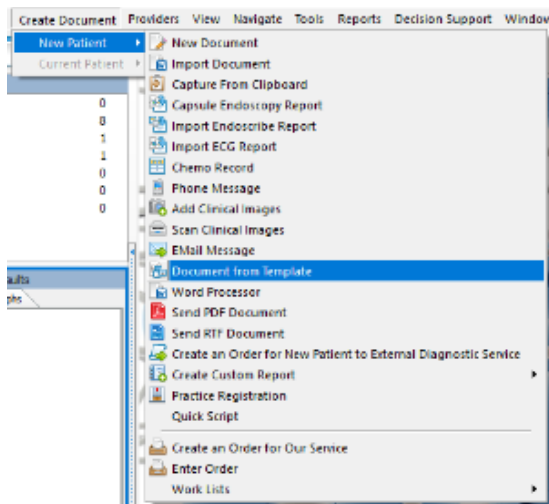
2. In the sub window choose the template you wish to use.

3. You will now be asked for the details of the report. Either lookup the patient details (Using the button in the **Surname** field) or entering them manually in the **patient details** fields. Additionally

you will have to choose your **From** doctor. Finally you will need to address the report. To do this choose the **Magnifying glass** in the top right corner and use the **Provider Lookup.**

4. Below is an example of a well filled out screen. Click **okay** when ready to move to the next step.

5. The document should now open with all the details you entered from the previous window. Make any additional changes to the message here.

6. When you are ready to send choose **File --> Save** and **Send.**

7. A preview window will come up. If you are happy with the report click **okay** for it to send. If you do not want the message to go choose **cancel.**