Adding / Updating Word Document Templates

Changes/additions that need to be made to a template must be done on the host machine/server.

Adding new templates

When adding new templates to be incorporated into the Bradoc system, they must be added to the host machine/server. (i.e. \\netserver\BREXE\Master Data\Templates). This can be done from any machine that has access to the server.
Browse to the host machine/server and open the “BREXE” folder. Inside that folder you should find a “Master Data Folder”.

If the “Master Data” folder does not exist, you need to create one. To create a new folder, right click on the BREXE window and select NEW → Folder. When the new folder appears in the BREXE folder, rename the folder to “Master Data”.
Open the “Master Data” folder and you should find the “Templates” folder.

If the “Templates” folder does not exist, you need to create one. To create a new folder, right click on the Master Data window and select NEW → Folder. When the new folder appears in the “Master Data” folder, rename the folder to “Templates”.

The “Templates” folder is the location where you will add or modify templates. Again, any templates that need to be added or modified needs to be done in the servers “Templates” folder.

Modifying Existing Templates

**Any template that needs modification has to be done in the servers “Templates” folder.

Browse to the host machine/server. (i.e. \\netserver\BREXE\Master Data\) and locate the “Templates” folder. This folder will reside in the “\\ BREXE\Master Data” folder. Select the desired template. When the template opens, it may ask you to locate the templates data source. Browse to your “C:\BREXE\Templates” folder and located the correct data source. The correct data source will contain a “ds” prefix along with the original template name. (i.e. if the template name = BRADOC.doc, the data source name = dsBRADOC.doc) Double click the correct data source and the template document will open.

Viewing the Mail Merge Controls

After the template loads, you should see buttons referring to mail merge fields (i.e. Insert Merge Fields) If you do not see this button, right click on a blank spot in your tool bar and select “Mail Merge”. You should now see the mail merge controls.

Viewing Data Source vs. Data

You can toggle between viewing the data source and data fields by clicking the button “<<ABC>>”. This way after you make changes, you can preview how the template will look.

Modifying Existing Fields

To remove a field from the template, highlight the field and press delete.
To add a field, click the “Insert Merge Fields” and it will give a listing of all available fields. Place the cursor in the location where you want to add the new field, click the “Insert Merge Fields” and select the field you want to add.
Again, clicking the button “<<ABC>>” will preview how the template will look in data mode and data source mode.

How do other users get the Added/Updated Templates?

After the changes have been made to the host machine/servers “Templates” folder, the other users will receive the new templates/modifications that next time the log into the Appointment Scheduling or Dictation modules. So, if the users are already in the Bradoc System, they have to log out of Bradoc and re-log in.

This is why it is important that any changes to the templates needs to be done on the host machine/servers “Templates” folder. If changes are made to the local machine, they will be erased the next time you log into the Appointment Scheduling or Dictation modules.