



Spring Cleaning Your RxWorks Documents

A Guide To Adjusting Documents And Tidying Up Aging Templates

Overview

As springtime arrives in Australasia we at Covetrus have compiled the following article to assist in a clean-up of RxWorks document templates. A spring cleaning of documents is a great routine to get in the habit of, as practices change ownership and management, and migrate further towards a paperless business model. Included in the document are links to the Online Manual where further information and references are hosted for your perusal.

A few well-formatted documents have also been included, attached to the email, to modify to a practice's liking to kick-start a clean-up of your documents (see [appendix 4](#)).

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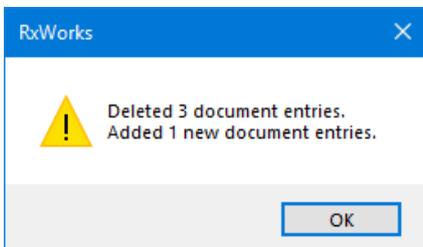
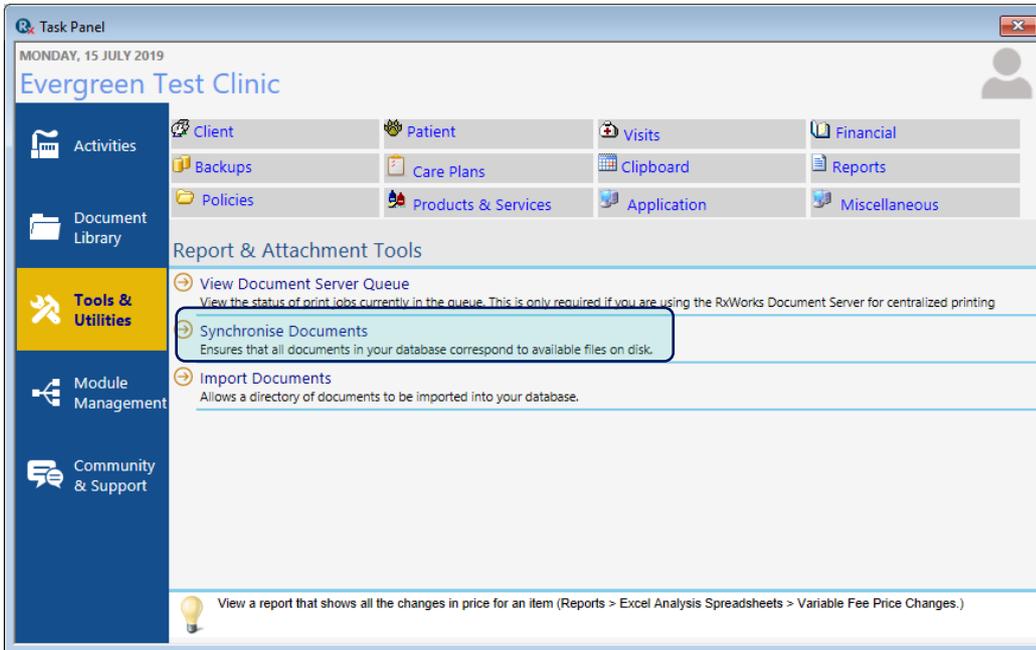
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Synchronise Documents

It is important that the documents visible in RxWorks match the template files on your server.

A user with administrative privileges can run a document synchronisation through RxWorks to clean up anything that has been removed but still remains in the front-end of RxWorks.

Navigate to Task Panel > Tools & Utilities > Reports and click Synchronise Documents.

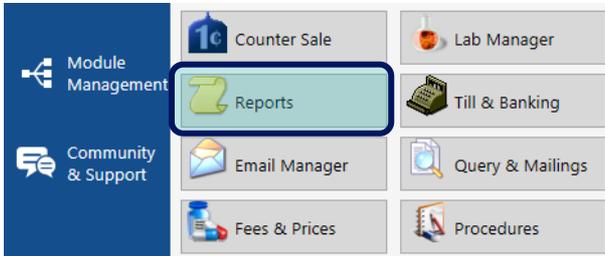


Now that the documents match those on the server exactly, they can be corrected in RxWorks where necessary. It is also a best practice to synchronise documents after any hardware changes, as some documents may have moved or possibly changed names in the process.

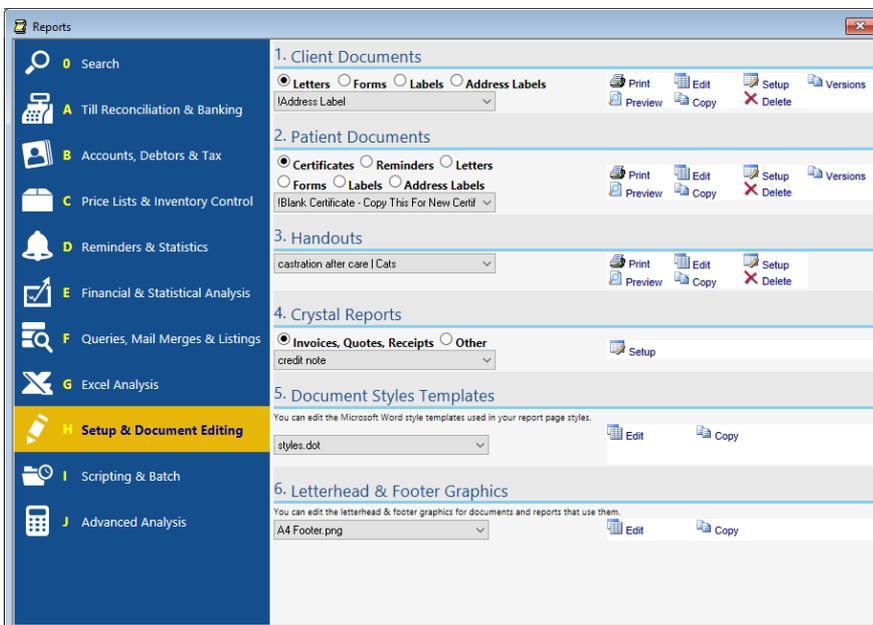
Setup & Document Editing

Documents can be edited by any user included in the document editing policy (see [Appendix 1](#)).

Navigate to Task Panel > Reports.



In the menu on the left of the page, click on H. Setup & Document Editing.



This screen is segmented into 6 areas:

1. Client Documents
2. Patient Documents
3. Handouts
4. Crystal Reports
5. Document Styles Templates
6. Letterhead & Footer Graphics

Each area has multiple radio buttons which swap between lists of document templates available to use. The mergefields that can insert into the documents depend on the list they're in. For example, a client document can insert client financial information, while a patient document can insert vaccination or reminder information.

Sections have many tools available on the right of the window (see [Appendix 2](#)).

Definitions

Mergefields

As RxWorks has been developed and evolved over time, the same has occurred with documents and how data is populated into them. As documents are generated, 'merge fields' are used, which replace, for example, <<client first name>> with Declan. This process was once handled by Microsoft Word but as RxWorks has grown to include many elements not easily supported by Word, it has adapted with newer, more 'pliable' technology; [Syncfusion](#).

In short, Syncfusion is an all-inclusive 'does everything' sort of software and it is now recommended that all RxWorks practices use 'Syncfusion' as the primary merge provider.

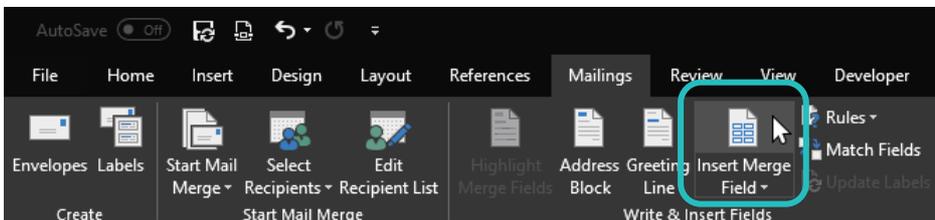
This change must be made by the RxWorks support team who can be contacted 24/7 by [phone](#) or [email](#). After changing from MS Word to Syncfusion as the merge provider, some older documents may change in format, or print differently to before.

A full list of mergefields is available in [Appendix 3](#).

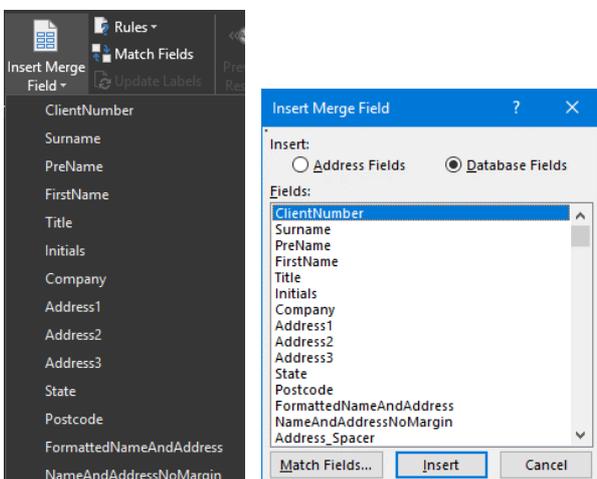
To toggle between Mergefields 'results' and the 'field codes' press the key combination 'Alt+F9'.

Results View		Field Codes View	
OWNER	Owner Name	OWNER	{ IF { MERGEFIELD Company }= "" "{ IF { MERGEFIELD Surname }= "" "Owner Name" "" } "" }

On the topic of mergefields, if you're looking to insert more, they are available in the ribbon bar > Mailings > Write & Insert Fields.



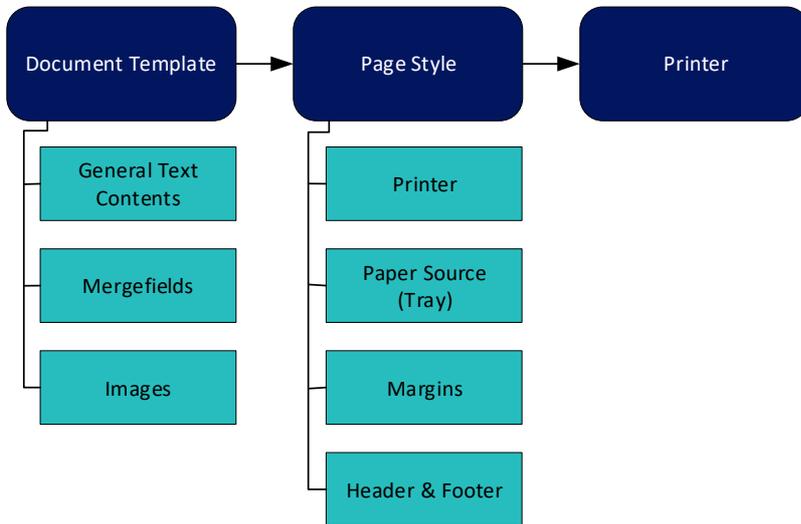
You can click the button to open a separate window, or the dropdown arrow (bottom quarter of the button) to choose from the list. The pop-out window displays two lists. The Address Fields are Word mergefields, while the 'Database Fields' are pulled from RxWorks. It is advised to only use the Database Fields while working on documents to be used in RxWorks.



Page Styles

Page styles are a unique feature of RxWorks. They define most of the parameters between the document's template and its final printed form.

In the flowchart below the basic features of the print process can be seen listed.



If two similar templates are set to different specific page style, then they may print differently to each other. For ease-of-use it is advised to follow the below steps when configuring page styles.

1. Use a naming convention

Names of page styles should be simple to understand and easy to remember.

2. Utilise 'Personalised Page Styles' where required

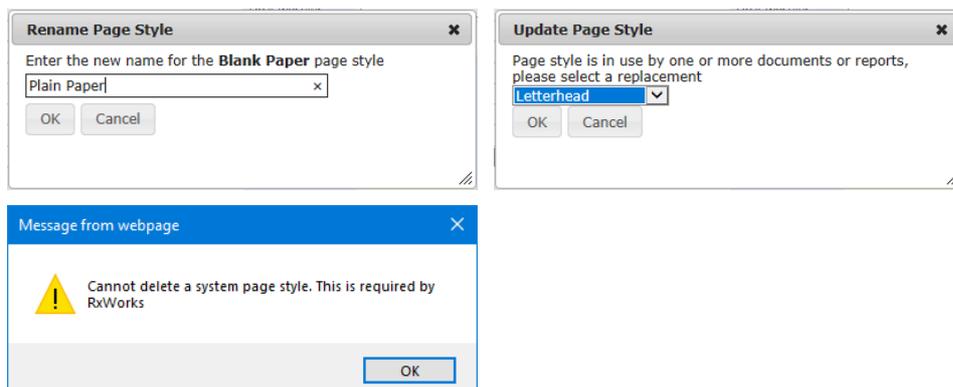
These may be useful if a document is printed from multiple locations within the practice and there are printers located in different rooms.

3. Set similar templates to the same page style

For example; if all certificates print on A4 paper with a letterhead, set all of the certificate templates to your 'Certificate LH' (or similar name) page style.

4. Rename and delete page styles

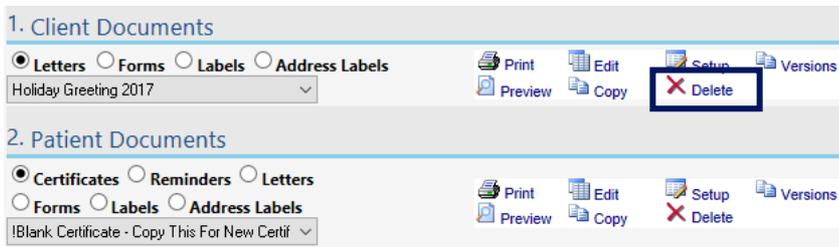
Any page styles which don't fit the naming convention should be renamed or deleted. If a page style is in-use by any documents, you will be prompted to select a replacement page style. Some page styles are unable to be removed as they are built in to the system. They can however be renamed.



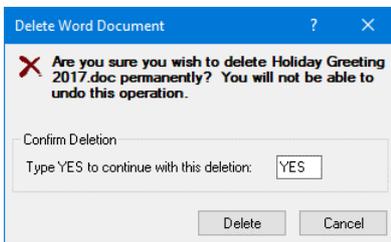
Delete Unused Documents

As practices grow and adapt over time there may be documents which are no longer used. It's always a good idea to regularly check which documents aren't used anymore and delete them.

To delete a document simply select it from the drop-down list and then click 'Delete' on the right side of the window.



You will have to type 'YES' into the popup window to confirm the deletion of the documents. This is a precaution in case a user accidentally clicked Delete.



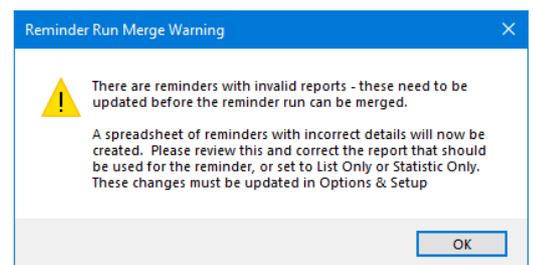
Make a Copy

If you are unsure if a document is used anymore we suggest making a copy of the document and prepending 'z_' to the beginning of the document's name. This will move it to the bottom of the dropdown list.

Check Reminders

Generate a test reminder run. If any documents were attached to reminders a warning prompt will appear and a spreadsheet will automatically generate, listing all missing documents and which reminders they were used on.

At this point you can decide if you wish to keep the documents or edit the reminders to use a more suitable or generic version of the document you are keeping.



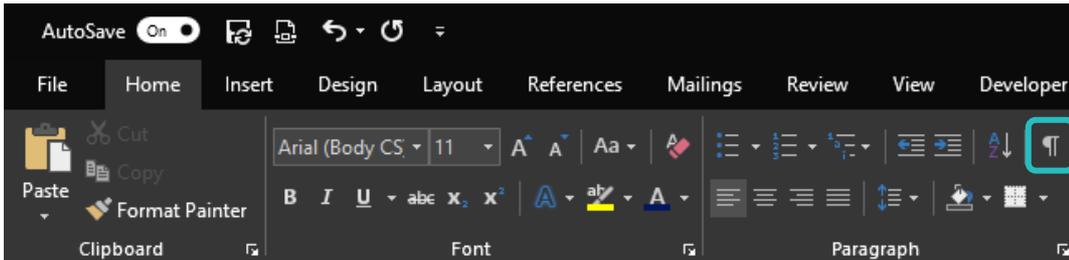
	A	B	C	D	E
	Reminder Code	Reminder Name	Reminder Species	Reminder Iteration	Invalid Reminder Letter Name
4	900002	Rhinotracheitis Virus, Feline Calicivirus & Panleukopenia	Cat	1st Reminder Letter Invalid	vaccination reminder.doc
8	900022	Leukaemia	Cat	1st Reminder Letter Invalid	vaccination reminder.doc
18	900633	Parvovirus	Dog	1st Reminder Letter Invalid	vaccination reminder.doc
23	900953	Bordetella Bronchiseptica	<All Species>	1st Reminder Letter Invalid	vaccination reminder.doc
25	900955	Leptospirosis	<All Species>	1st Reminder Letter Invalid	vaccination reminder.doc
27	900959	Feline Chlamydia Virus	Cat	1st Reminder Letter Invalid	vaccination reminder.doc
29	900960	Coronavirus	Dog	1st Reminder Letter Invalid	vaccination reminder.doc
33	901670	Parainfluenza	<All Species>	1st Reminder Letter Invalid	vaccination reminder.doc
35	907037	Bovine Ephemeral Fever	Large Animal	1st Reminder Letter Invalid	vaccination reminder.doc

Editing in Word

While many people have already found their rhythm using Word in their own ways, there are many 'best-practice' tips that will return consistent formatting when printed or previewed including mergefields, images, page style formatting, and other features through RxWorks.

Formatting Marks

The formatting marks button ¶ is found in the first ribbon bar menu Home > Paragraph.



This button toggles 'formatting marks' in Word documents.

These include:

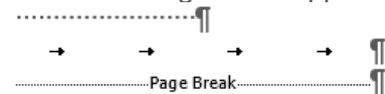
- Tabs
- Spaces
- Paragraph marks
- Page breaks
- Anchors

If a document is previewing differently to when it's being edited, it may be because of some hidden formatting. Toggling this view allows you to take a 'behind-the-scenes' look at the formatting of the document.

Tabs > Spaces

Some common issues occur when spaces are used instead of tabs.

The formatting marks appear as so:



If there are many spaces in a document, used instead of tabs or new lines, it is a simple process of highlighting them, and pressing tab to replace the highlighted content.

Paragraph > Line Break

A paragraph mark (¶) is inserted by pressing Enter. However, a line break (↵) is inserted by pressing Shift+Enter. The difference is that a line break doesn't use line spacing and continues the formatting of the previous line.¶

Note the difference between the above paragraph and the next line. ↵

I've used a line break which makes these two sentences appear as part of the same paragraph.

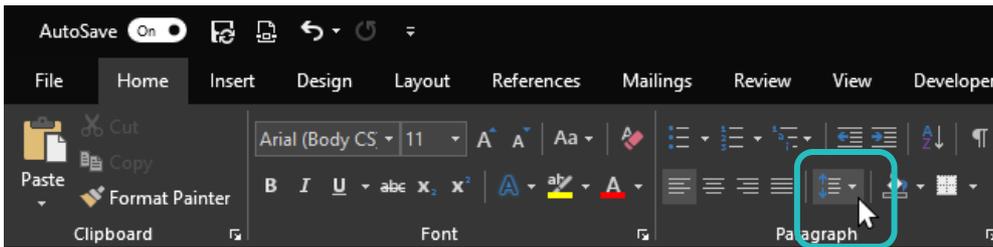


I've used a page break to start this sentence on the next page, even though the above text has not completely filled the page. This is helpful when you use tables on a document and need to move the text onto the next page.

Line Spacing

Depending on your document template, the line spacing default can vary greatly. If you have pages almost filled to the brim with content, and you can't reduce the font size any more, you could decrease line spacing.

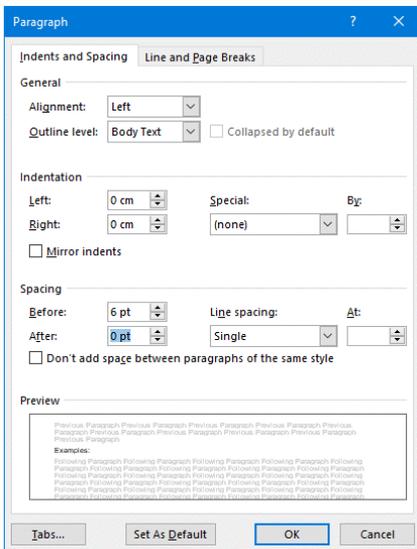
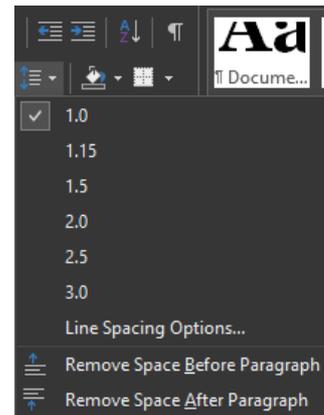
Line spacing can be adjusted by highlighting the content you wish to adjust, then navigating through the ribbon bar: **Home > Paragraph > Line and Paragraph Spacing**.



Clicking the line spacing button opens a drop-down menu with some quick-format options.

You may select any of these quick-format options or choose 'Line Spacing Options' near the bottom of the list to finely-tune the spacing. Perhaps you want a smaller space after one line, but don't want to reduce the space before it?

In this instance you could leave the 'Before' spacing at 6 pt. (points) and adjust the 'After' spacing down to 0 pt.



Examples:

Single line spacing between this and the next.

Double line spacing between this and the next.

As you can see, there's quite a difference between the spacing options.

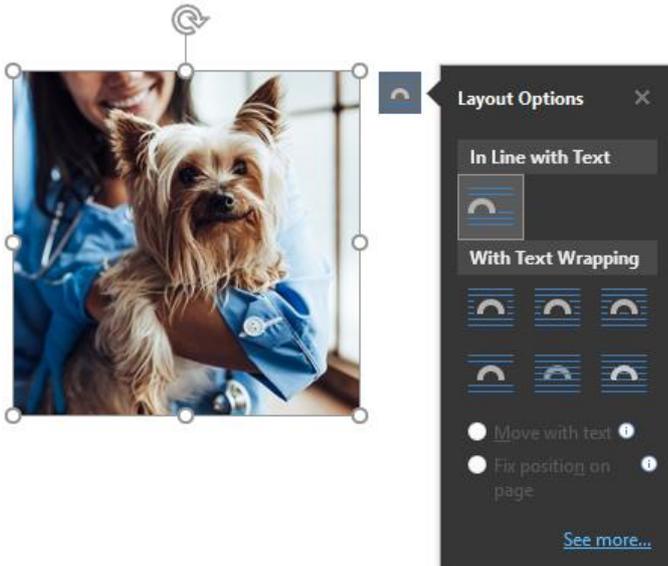
Images

There is no right or wrong way to layout images in a document (within reason).

If your practice abides by a set style guide, then of course, it's best to stick to that. However, if you need to place an image somewhere else on a page that isn't covered by your style guide, such as a patient vaccination certificate, then you will need to decide upon a layout suitable to the scenario.

The below image has been aligned with this paragraph.

To set this, I clicked once on the image to display the 'Layout Options' button hovering on the right of the image, then chose from the list of options to select the 'In Line with Text' layout option.



To wrap this text around the image I chose 'square'. This allows the image to sit alongside this paragraph, without moving the text up or down the page.

I would suggest trying out each layout option to find which one suits. The 'Top & Bottom' layout is one of the more disruptive choices, as it forces all neighbouring text to move away from the image, either up or down the page, and sometimes onto the next page altogether.



Tables

Tables are utilised in a majority of RxWorks documents. They allow text to be accurately placed on a page without adhering to regular 'left-to-right' rules.

As an example, a vaccination certificate could include a table with the client and patient information on the left, and the practice's information on the right.

If multiple tables are used in one document, it is best to use the same design every time instead of changing styles.

The below table contains other tables nested within it. This is extracted from a template of a Vaccination Certificate used in RxWorks.

VACCINATION CERTIFICATE	
OWNER «Title» «FirstName» «Surname» «Address1», «Address2» «Address3» «State», «Postcode»	CONTACT «AllClientPhoneNumbers»
NAME «PatientName»	SEX «Sex» «DesexingType»
BREED «Breed» «Species»	COLOUR «Colour»
D.O.B. «DateOfBirth» AGE «AgeNow»	WEIGHT «FormattedWeight»

If we take a look at another example of this table but enable formatting marks, we can see how the document may preview differently to how it's displayed while editing it in Word.

VACCINATION CERTIFICATE	
OWNER «Title»·«FirstName»·«Surname»·¶ «Address1»,«Address2»········ → ← «Address3»·«State»,·«Postcode»··¶	CONTACT «AllClientPhoneNumbers» → → ······ → → ···· → ¶
NAME «PatientName» → → ¶	SEX · → → ···«Sex»·«DesexingType»¶
BREED ·····«Breed»·«Species»··¶ ¶	COLOUR «Colour»¶
D.O.B. ·¶ «DateOfBirth»·· AGE ·«AgeNow»··¶	WEIGHT «FormattedWeight»¶

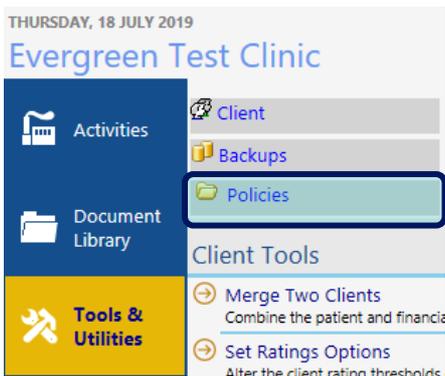
As you can see using the 'behind-the-scenes' Formatting Marks display, the Breed and Sex tables contains both the titles and contents in one cell. If we were to generate patient information in this document, the contents may not line-up and cause flow-on formatting issues throughout the rest of the table and page.

Appendices

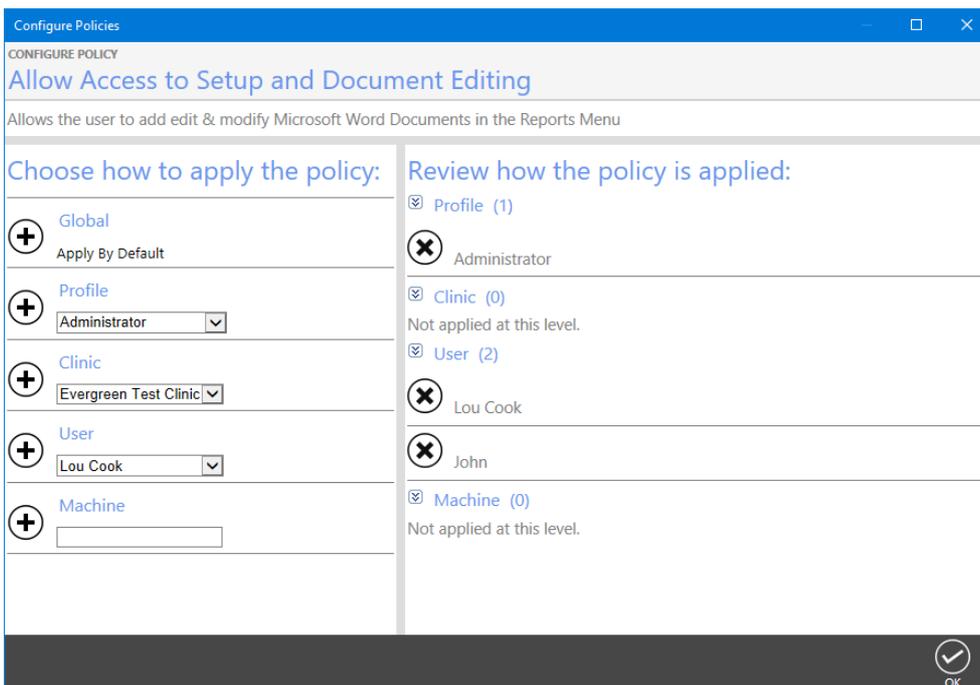
Appendix 1. Document Editing Policy

The document editing policy is applied to all users (Global) by default. If you wish to restrict access in any way, you will need to remove the Global access and add individual entries.

To amend the policy, navigate to Task Panel > Tools & Utilities > Policies.



Simply type 'document' into the search box to find the policy titled 'Allow Access to Setup and Document Editing'. Click the policy to make changes.

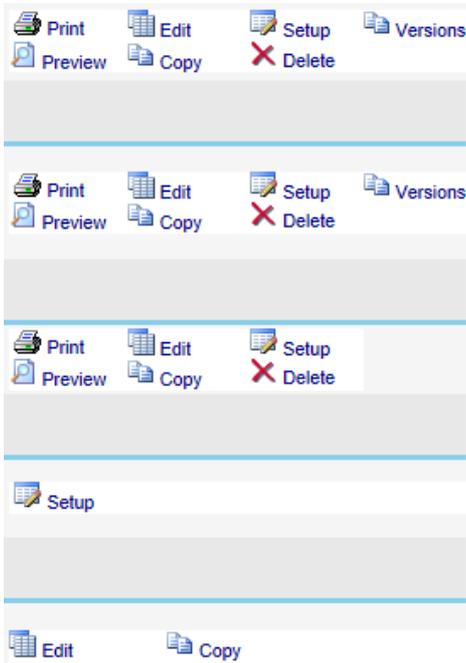


You can add or remove:

- Global users
- Users with a particular profile
- Users who have access to a clinic
- Individual users
- Computer names

Appendix 2. Document Management Tools

The right-side of the Reports page hosts all of the document management tools.



These tools are defined in the table below:

Tool Name	Function
Print	Print the selected document using it's configured Page Style
Preview	Preview the selected document using the last-viewed patient's details
Edit	Open the template in Microsoft Word to edit
Copy	Create a copy of the selected template inside of the same folder
Setup	Configure the Page Style used
Delete	Delete the template from RxWorks and the server
Versions	Manage the versions of the template

A selection of these tools are available on the right-hand-side of each section of the Setup & Document Editing window.

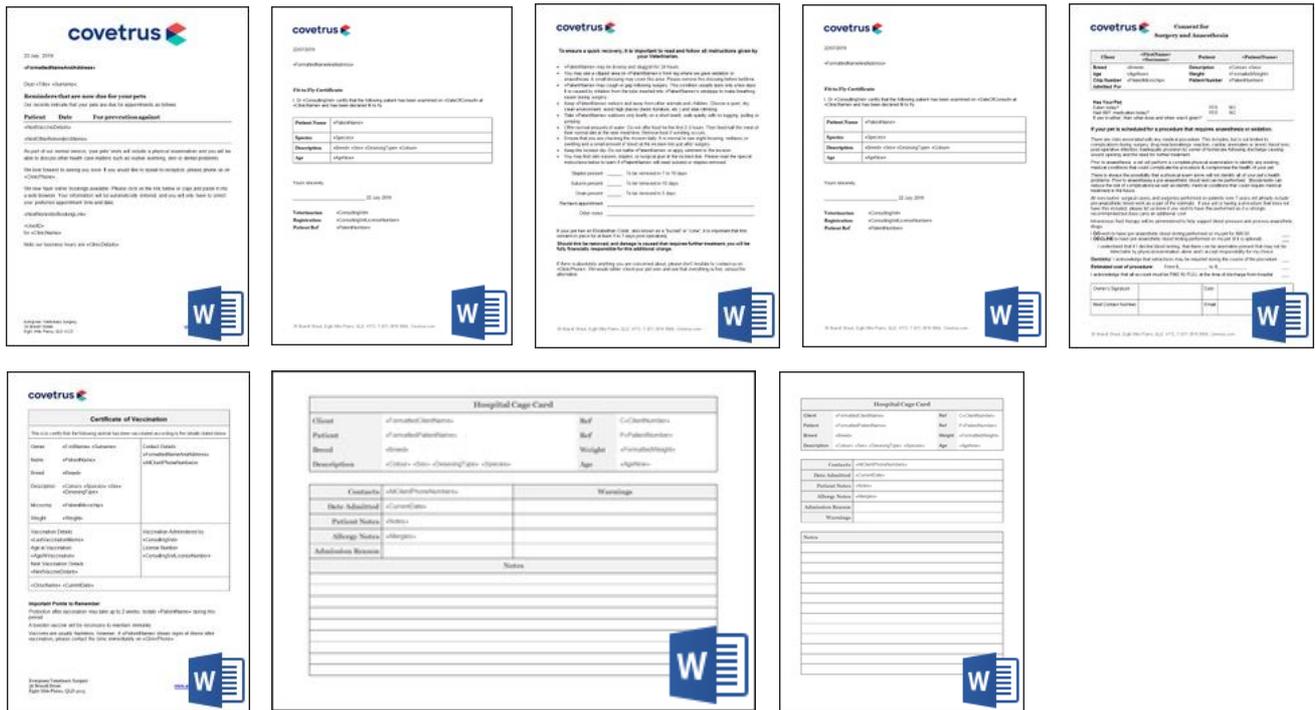
You will note that some sections, such as Crystal Reports, do not list all of the tools. This is due to these templates not being editable or they must be generated directly from a record, rather than through this screen.

Appendix 3. Mergefields List

The Excel document listing all mergefields is available through the Online Manual here: <https://softwareservices.covetrus.com/apac/OnlineManual/mergefields/>

Appendix 4. Sample Documents

A selection of documents have been formatted and attached to the email. You may download these and copy the contents into your existing RxWorks documents if you wish to use them. Otherwise, open the documents and view the format as a reference for improving and updating your current documents.



Appendix 5. Further Reading

Interested in learning more about Word and improving your formatting skills?

Free Courses

<http://wordfaqs.ssbarnhill.com/NonprintChars.htm>

<https://www.howtogeek.com/school/microsoft-word-document-formatting-essentials/>

<https://au.pcmag.com/office-suites/12978/16-microsoft-word-tips-you-need-to-learn-now>

Paid Courses

<https://www.wesleytraining.edu.au/courses/microsoft-word-essentials/>

<https://pdtraining.com.au/courses/office-365-word-essentials-training-course>