Templates

Last Modified on 03/11/2020 12:07 pm EDT

Version 14.19

> 📌 **Note**: This article applies only to OP's Cloud environment. For exporting and importing in a Client Server environment, click **here**.

Overview

When trying to import or export files within the Office Practicum Cloud Solution, you need to be sure that you are using the correct location. This article explains how to export and import templates using the Cloud Server.

Export

1. Create a folder on your local computer where you want to save your exported template.
2. In OP, navigate to **Clinical tab > Encounter Templates** or **Well Visit Templates** to open the template editor window.
3. Select the template to export.
4. Click the **Export** button. A confirmation message is displayed.
5. Click **Selected** or **All** in the confirmation window.
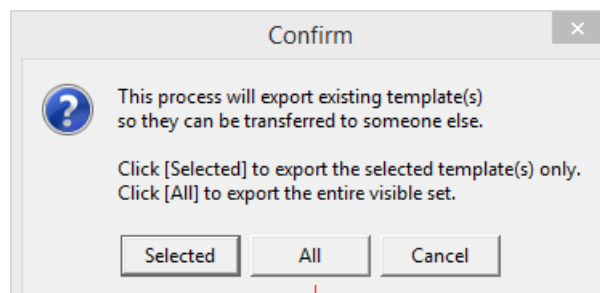
6. Within the File Explorer window:

   A. Navigate to the **Network** drive in the **Save As** window.
   B. Double-click **tsclient**.
   C. Double-click the **\\tsclient\C Share** or your local folder.
   D. Navigate to the folder you created in Step 1.
   E. Click the **Save** button. An information window is displayed to confirm the export.
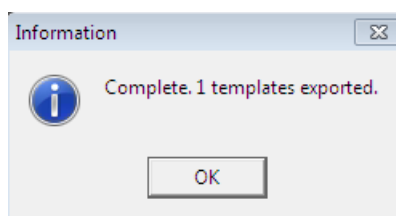
7. Click **OK**.

Import

> **Warning**: For warnings and procedures for importing templates, refer to the following related articles:

- **Warnings: Before You Share Templates**
- **OP Template Sharing Catalog**
- **Customizing Shared Templates**

OP is not obligated to fix your templates or your data if you import or share templates and damage either your templates or data in the process.

1. In OP, navigate to **Clinical tab > Encounter Templates** or **Well Visit Templates** to open the template editor window.

Tip: OP recommends that you import and share only Encounter templates. The Bright Futures templates provided by default in OP include all of the Well Visit information you will need to capture and you may overwrite or duplicate your existing Well Visit templates.

2. Click the **Import** button. The File Explorer window is displayed.
3. In the **Network** folder, navigate to **tsclient** > **\\tsclient\C > Users** to locate the files you downloaded to your computer.

   a. Click on the file you want to import.
   b. Click the **Open** button.
   c. Click the **OK** button in the confirmation windows. The template is imported into OP.

Note: When you import a template in the Cloud environment, OP duplicates the template name. OP does not add "-COPY" to the filename and does not create a timestamp. To determine which of the templates is the most recent, compare the numbers displayed in the **Note ID** field. OP increments the Note ID number by one for each imported template.

4. Locate and select the imported template in the template list.
5. Click the **Edit** button.
6. *(Diagnosis and Symptom Templates Only)* To the right of the Author field, click the **Clear** button to remove the defaulted Author ($FX).
7. *(If needed)* Customize the imported template. It is a Best Practice to review all imported templates to ensure they are set up to best meet the needs and workflows of your practice.
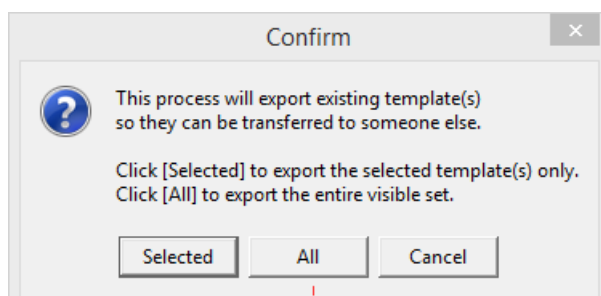
Version 14.10

This article applies only to OP 14 in the Cloud environment. For exporting and importing in a Client Server environment, click **here**.

Overview

When trying to import or export files within the Office Practicum Cloud Solution, you need to be sure that you are using the correct location. This article explains how to export and import templates using the Cloud Server.

Export

1. Create a folder on your local computer where you want to save your exported template.
2. In OP 14, select **Utilities / Manage Clinical Features / Encounter Template Editor** or **Well Visit Template Editor**. The template list displays.
3. Select the template to export.
4. Click the **Export** button ⬆ Export . OP 14 displays a confirmation message.
5. Click **Selected** or **All** in the confirmation window.

Confirm ✕

This process will export existing template(s)
so they can be transferred to someone else.

Click [Selected] to export the selected template(s) only.
Click [All] to export the entire visible set.

| Selected | All | Cancel |

6. Within the File Explorer window:

    a. Navigate to the **Network** drive in the **Save As** window.
    b. Double-click **tsclient**.
    c. Double-click the **\\tsclient\C Share** or your local folder.
    d. Navigate to the folder you created in Step 1.
    e. Click the **Save** button.

    OP 14 displays an information window.

Information ⊠

Complete. 1 templates exported.

OK
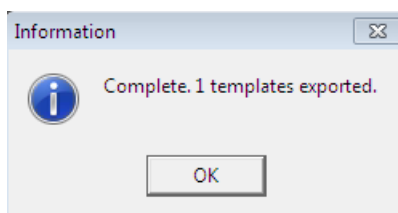
7. Click **OK**.

Import

> ⛔ **Warning**: While OP Version 14.6.12 introduced functionality that prevents the duplication of Encounter Questions when importing templates, if you are not careful when importing templates, you may inadvertently overwrite existing templates in your OP 14 system. It may be very difficult to undo any changes to your base templates after importing revisions of those templates. For warnings and procedures for importing templates, refer to the following related articles:
> - **Warnings: Before You Share Templates**
> - **OP 14 Template Sharing Catalog**
> - **Customizing Shared Templates**
>
> **OP is not obligated to fix your templates or your data if you import or share templates and damage either your templates or data in the process.**

1. In OP 14, select **Utilities / Manage Clinical Features / Encounter Template Editor** or **Well Visit Template Editor**. The template list displays.

> ⛔ OP recommends that you import and share only Encounter templates. The Bright Futures templates provided by default in OP 14 include all of the Well Visit information you will need to capture and you may overwrite or duplicate your existing Well Visit templates..

2. In the Template Editor, click the **Import** button ⬇ Import .
3. In the **File Explorer** window, locate the files you downloaded to your computer.

    a. Click on the file you want to import.
    b. Click the **Open** button.
    c. Click the **OK** button in the popup confirmation windows.

OP 14 inports the selected template.

Note: When you import a template in the Cloud environment, OP 14 duplicates the template name. OP 14 does not add "-COPY" to the filename and does not create a timestamp. To determine which of the templates is the most recent, compare the numbers displayed in the **Note ID** field. OP 14 increments the Note ID number by one for each imported template.

4. You can now edit and rename one of the templates.
5. When you import a template in the Cloud environment, OP 14 uses **$FX** for the **By** extension **VERIFY THIS TEXT, THAT IT IS THE "BY EXT"** To edit the template, change the **By** extension to UFX.
6. To delete a template, after changing the By extension to UFX, you must assign yourself as the owner of the template **VERIFY THAT WE WANT TO PROVIDE ANY INFO ON DELETING TEMPLATES. IF SO, SHOULD WE ADVISE THEY ONLY DELETE IMPORTED/DUPLICATED TEMPLATES?**
7. Customize the imported template. It is a Best Practice to review all imported templates to ensure they are set up to best meet the needs and workflows of your practice. Refer to **Customizing Shared Templates** for details.