

Quick Guide: Emis Web Document Templates

Importing a document template

When a new referral form or template is e-mailed to you for importation into Emis Web, you should first save the attachment temporarily in a place where you can easily retrieve it (e.g. My Documents, Shared Drive, etc).

*Note: These documents will usually have a file extension of .EWDT (Emis Web Document Template), and as such, **cannot** be previewed in anything other than Emis Web itself.*

To Import the Document Template

1. Access Template Manager:

Click the **EMIS Button**, point to **Configuration**, and then select **Template Manager**.

Note: This requires RBAC Code B1700 assigned to the user.

2. In the navigation pane, click the **Document Templates** tab.

3. Select the folder where you want to save the imported template.

4. On the Template Manager ribbon, click **Import**. The Import Template screen is displayed.

Note: Document templates are assigned a version number if there is an existing template with the same name rather than replacing the stored version.

5. Navigate to the location of the required template, and then click **Open**.

The template is imported to the selected folder.

Deactivating a document template

Once the new document template has been imported, you may then need to remove (or deactivate) the existing template that it replaces. This can be achieved by following the steps below:

To Deactivate the Document Template

1. Access Template Manager

Click the **EMIS Button**, point to **Configuration**, and then select **Template Manager**.

2. In the navigation pane, click the **Document Templates** tab.

3. Select the folder that contains the required template.

4. **Right click** the required template, then point to **Status**, and then select **Deactivate**. **Click Yes** to confirm your action.

*Optionally, you can also repeat step 4 but select **Archive** in place of deactivate. This removes the template from the template manager folder, but does not delete it.*

If you require any further information please contact your practice's designated Clinical Applications Specialist (IT Trainer)
or Chris Hendry, Clinical Applications & IT Systems Manager (North)

(m) 07943 511170 (e) chris.hendry@nhs.net

Taken from UG160: Emis Web Template Manager