



Template Tools User Guide

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Template Tools

Overview

Template Tools

- + **Navigation Updater** - Update template navigation links
- + **Picklist Customizer** - Copy picklists to a unique name
- + **Relationship Finder** - Discover how templates relate to other objects
- + **Shared Fields Finder** - Find templates that share a designated field
- + **Shared Picklists Finder** - Find fields that share a designated picklist
- + **Trigger Copier** - Copy triggers from one field to another
- + **Trigger Mover** - Move triggers from a button or image to another image

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Template Tools is a series of tools launched from standard NextGen medical record templates which greatly speed development. The Template Tools template is launched from the ‘tic-tac-toe’ box in the same manner as other medical record templates.

The general process for utilizing Template Tools is as follows:

1. Open a test patient.
2. Launch the Template Tools template.
3. If the tool updates a template, close that template in Template Editor.
4. Each tool contains instructions on its use contained in a pop-up launched from the ? icon.
5. Execute the tool. The tool will automatically update the template cache as needed.

Template Tools is intended to be used solely in a development environment and should never be imported into Production.

Template Tools

Navigation Updater

+ Navigation Updater ?

- Old Template Name:

- New Template Name:

Navigation Triggers Updated:

Templates Now Linking to New Template:

Template Name

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The Navigation Updater permanently redirects links from one template to another. It is not intended to replace the Redirect Navigation Links tool within Template Editor, which should still be used when copying KBM templates to create custom templates.

Instructions:

1. Close the template(s) to be updated.
2. Select the **Old Template Name** and **New Template Name**.
3. Then click **Update** to permanently redirect all template links from the old template to the new template.
4. The data grid at the bottom of the tool shows all templates which now point to the new template.

Relationship Finder

+ Relationship Finder ?

- Select Template Name:

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All objects related to **master_im** template.

1. Templates that launch this template

Template Name
adult_chart_summary
ICSNotationExample_SMI
Lab_Letter
peds_chart_summary
preceptor
RHE_Drug_Study

2. Templates launched from this template

Template Name
anticoagulation_dosing
Disease_Mngt
health_maint
im_chronic_condx
Isabel
OB_Profile_1
Office_Visit_Brief
peds_home
PEDS_Office_Visit
telephone_call

3. Pop-up templates launched from this template

Popup Name
advance_directives
alert_vital_signs
alerts_mrp
Allergy_Comments
Customer_Service
fp_assessment_2

The Relationship Finder analyzes how a template relates to other templates and documents. It is helpful for troubleshooting or determining the templates needed to move from one environment to another.

Instructions:

1. Select the **Template Name** you would like to analyze.
2. Click **Search**.
3. The related templates, pop-up templates, extended pop-up templates, stored procedures, and documents will display on the results template.
4. These lists can be printed by clicking **Print Document**.

Template Tools

Shared Field Finder

+ Find Templates Sharing Field ?

- Table Name:

- Field Name:

Template Name

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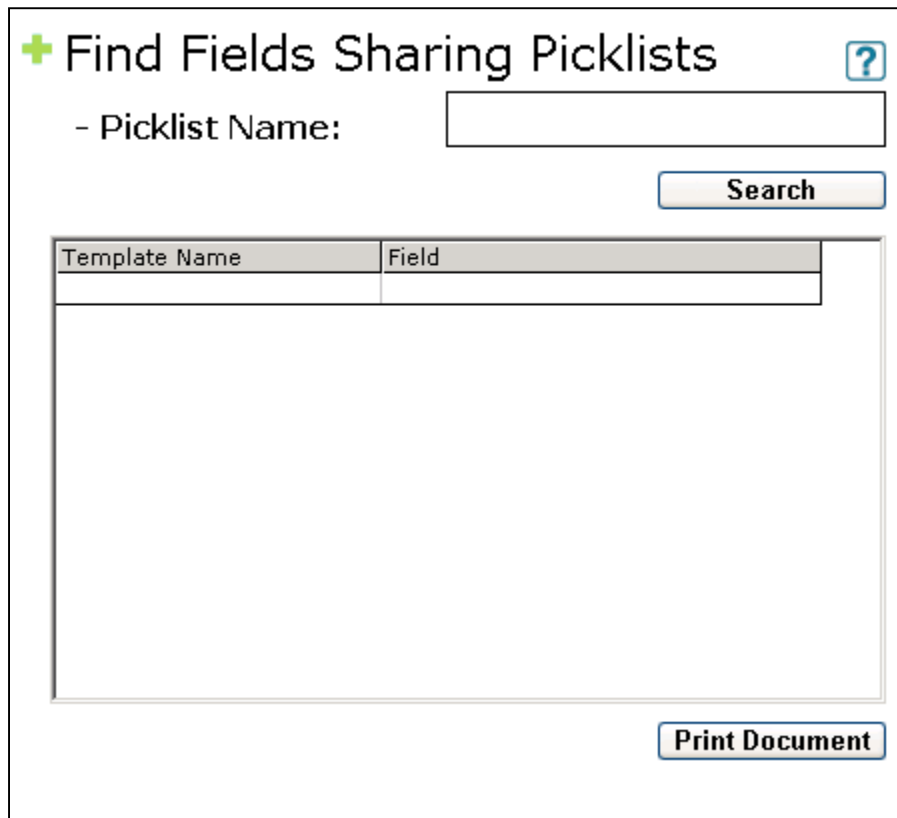
The Shared Field Finder determines all templates sharing a selected template field. The tool is useful in determining how a customization made to one template may impact other templates also sharing that field.

Instructions:

1. Select the **Table Name** and **Field Name**.
2. Click **Search**.
3. The templates containing the shared field will show in the datagrid at the bottom of the template.
4. This list can be printed by clicking **Print Document**.

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Shared Picklist Finder



The screenshot shows a web application window titled "Find Fields Sharing Picklists" with a help icon (question mark) in the top right corner. Below the title is a text input field labeled "- Picklist Name:" and a "Search" button. Underneath is a data grid with two columns: "Template Name" and "Field". The grid is currently empty. At the bottom right of the window is a "Print Document" button.

The Shared Picklist Finder determines all fields sharing a selected picklist. The tool is useful in determining how a change to a picklist may impact other fields using that picklist, especially picklist selections that are referenced in trigger conditions.

Instructions:

1. Select the **Picklist Name**.
2. Click **Search**.
3. The fields containing the shared picklist will show in the datagrid at the bottom of the template.
4. This list can be printed by clicking **Print Document**.

Trigger Copier

+ Copy Triggers ?

From...

- Template Name:

- Table Name:

- Field Name:

To...

- Template Name:

- Table Name:

- Field Name:

Triggers Copied:

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The Trigger Copier is used to copy triggers from one field to another, including from one template to another. All triggers are copied simultaneously and trigger order is retained. *Note: The Trigger Copier only allows triggers to be copied to a field without triggers.*

Instructions:

1. Close the template(s) to be updated.
2. Select the **Template Name**, **Table Name**, and **Field Name** of the field containing the triggers to be copied. For buttons, leave the table name blank.
3. Select the **Template Name**, **Table Name**, and **Field Name** of the field to where the triggers will be copied.
4. Click **Update**. The number of triggers copied will display in the field at the bottom of the template.

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Trigger Mover

+ Trigger Mover ?

- Template Name:

- Old Field Name:

- New Field Name:

Triggers Moved:

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The Trigger Mover is used to move triggers from a button to an image. This tool is especially useful when converting customized templates to the KBM 7.9 look and feel.

Instructions:

1. Close the template(s) to be updated.
2. Select the **Template Name** containing the button and image.
3. Select the **Old Field Name** of the button containing the triggers to be moved.
4. Select the **New Field Name** of the image where the triggers will be moved to.
5. Click **Update**.
6. The number of triggers moved will display in the field at the bottom of the template.