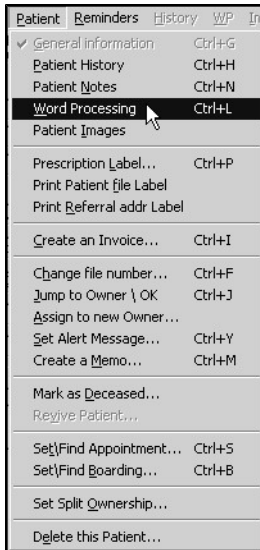# Word Processing and Document Handling

DVMAX's integrated, full-featured word processing facility makes it possible for you to quickly and easily create customized letters, reminder cards, rabies certificates and any other documents you require. You can access the word processing features of DVMAX from Clients, Patients or Referral Source sections, and the documents you create and save can be made available to all of the workstations on your network. The flexibility of the word processing facility allows you to create individual case documents or build document templates that can include virtually any data from a client, patient or referral source record.

ⓘ For Macintosh Users - Apple now recommends that all documents have a filename extension.
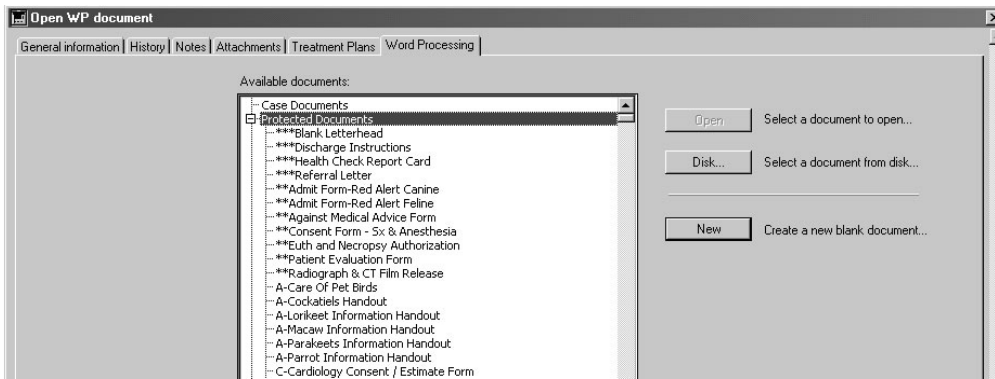
Opening Word Processing

You can access the Word Processing function from a client, patient or referral source record. To open the Word Processing facility:

- From a patient record, select the **Word Processing** tab or choose **Word Processing** from the **Patient** drop-down menu.

Patient	Reminders	History	WP	Im
✓ General information		Ctrl+G		
Patient History		Ctrl+H		
Patient Notes		Ctrl+N		
Word Processing		Ctrl+L		
Patient Images				
Prescription Label…		Ctrl+P		
Print Patient file Label				
Print Referral addr Label				
Create an Invoice…		Ctrl+I		
Change file number…		Ctrl+F		
Jump to Owner \ OK		Ctrl+J		
Assign to new Owner…				
Set Alert Message…		Ctrl+Y		
Create a Memo…		Ctrl+M		
Mark as Deceased…				
Revive Patient…				
Set\Find Appointment…		Ctrl+S		
Set\Find Boarding…		Ctrl+B		
Set Split Ownership…				
Delete this Patient…				

- From a client record, select the **Word Processing** tab or choose **Word Processing** from the Client drop-down menu.
- From a referral source record, choose **Word Processing** from the **Referral Source** drop-down menu.

- The Word Processing tab will present two options including opening a **New Blank Document** or opening a **Document Template**.

- If you wish to open a blank document select **New**.

- If you wish to open a pre-existing **Template** select the document in the document list and select **Open**.

Document Templates

DVMAX provides a long list of useful documents in the Word Processing tab. These documents include:

- Templates used for everyday working tasks. These are usually Protected documents

- Detailed Health information listings provided by Lifelearn

Protected Document

Some documents listed in the Word Processing tab have an asterisk before the document name. These asterisk usually distinguish the document as a Protected Document and are used to place the most commonly used documents at the top of the document list. Protected documents are usually templates that are used for daily tasks around the clinic.

For more information view *Save As Template* and *Overwriting Protected Documents* later in this chapter.

Lifelearn Health Documentation

DVMAX has provided a series of health related documents from Lifelearn. These documents provide background information on a series of common ailments. This can be printed or emailed to the client for further reference. These documents are listed alphabetically and do not have an asterisk in front of the name.

To open a Health document:

- Select the document you wish to open

- Select the Open button

- The document will then open in the Word processing window.

Navigating the Word Processing Facility

The Word Processing window is made up of several parts. These include:

- A main Word Processing menu bar above the text area, with drop-down menus such as **File**, **Edit**, **Insert** and **Tools**. (See also, *About the Word Processing Menus*.
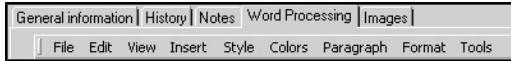
- A white document area.

- Four toolbars, which may appear above or below the menu bar, depending on the toolbar. By default, some of the toolbars are hidden. To view, select one or more toolbars from the **Toolbars** list under the **View** drop-down menu.
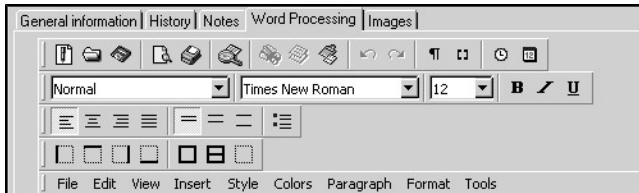
- A **WP Fields** menu, which can be accessed by clicking the **Show Palette** button.

- A horizontal ruler, located above the text area and a vertical ruler on the left side of the text area.
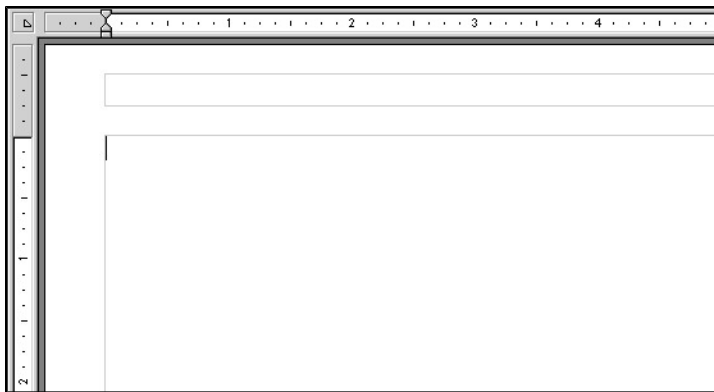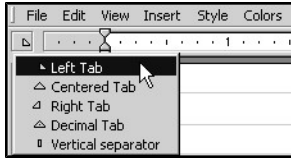

About the Rulers

The rulers display the position and type of tab stops, the position of margins and the position of the first line indent. There are 2 rulers on the WP window: the horizontal ruler at the top of the text area, and the vertical ruler on the left of the text area.

The horizontal ruler consists of two main parts:

- The ruler itself displays the location and type of tab stops as well as the location of the margins. Symbols appear along the ruler to indicate the position and type of tabs as well as the location of the margins.

- A drop-down menu, located at the top left end of the ruler, allows you to select a type of tab.
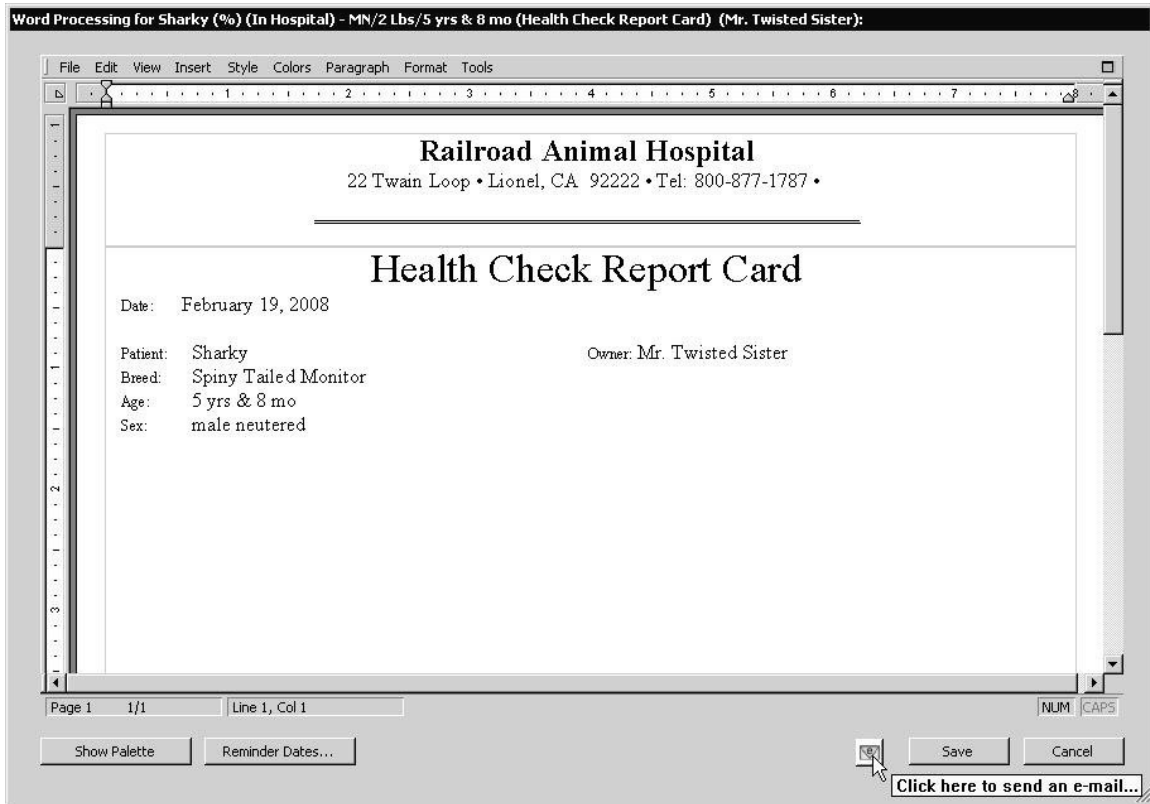

- The vertical ruler allows you to adjust top and bottom page margins, as well as letting you quickly resize the header and footer areas as needed.

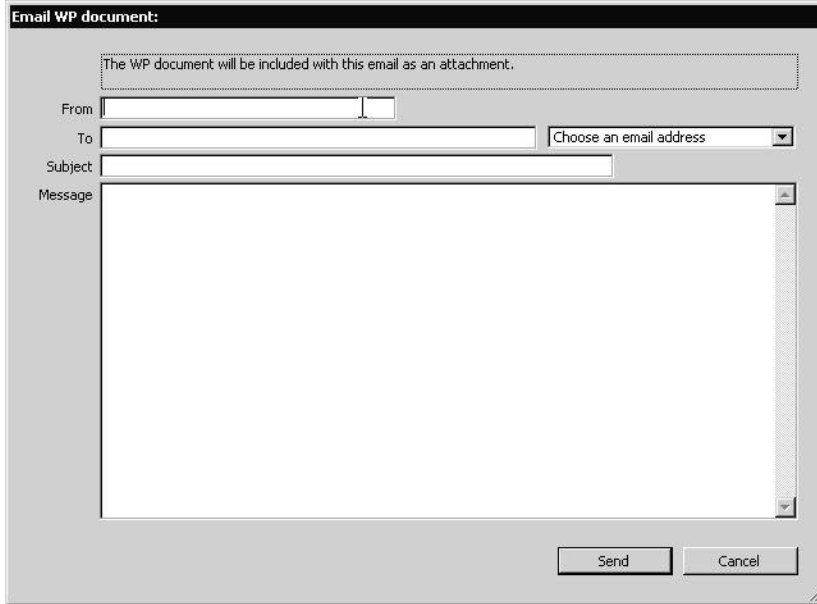For more information about how to use the ruler to set tabs and margins, see *Format a Document*.

ⓘ Using the **Copy Ruler** command from the **Paragraph** drop-down menu lets you copy all ruler settings from a current paragraph (including tab type and location, first line indent, and margin settings) and apply them to any other paragraph(s) you select.

E-Mailing an Open Word Processing Document

You can initiate e-mail directly from the e-mail button at the bottom of the Word Processing window.

- Click the email icon, and the Email WP Document window opens.

Email WP document:

The WP document will be included with this email as an attachment.

From

To [ ] Choose an email address ▾

Subject

Message

Send   Cancel

- Specify an email address in the **From** field. If there is only one possible **To** address, it is entered automatically. Complete the Subject field and Message body, and click **Send**.

About the Word Processing Menus

There are 2 menu bars that relate to the Word Processing facility:

- The WP drop-down menu is available from the DVMAX menu bar until you open a WP document.

The **WP Fields** menu, accessed by clicking the **Show Palette** button, is used for inserting references in to word processing documents

WP Menu

The **WP** menu is located on the DVMAX main menu bar when a patient, client or referral source record is open. This menu allows you to delete the current word processing document,

WP Fields and the Word Processing Palette

The WP Palette replaces the WP Menu in Word Processing. It is accessed by clicking **Show Palette** from an open WP document and provides tools for inserting specific references from a record in to a document. Items like client name, patient name, addresses, reminders, logs and more can be automatically inserted to quickly create customized documents or templates. See *Inserting References* as well as the *Word Processing* sections in Client, Patient and Referral Source chapters for more information on the **WPPalette**.

Main Word Processing Menus

The Word Processing menu bar has 10 drop-down menus. Many of the functions listed under the menus can also be accessed from the toolbars (see *About the Toolbars*). The word processing menus are briefly described below.

File - The **File** menu located on the Word Processing menu bar is used for printing, opening and saving files and for accessing word processing preferences. See the related sections in this *Word Processing* chapter for more detail.

⚠ All references to the **File** menu in this Word Processing chapter refer to the **File** menu located on the Word Processing menu bar and not the **File** menu on the DVMAX menu bar.

Edit – From the **Edit** menu you can access familiar word processing features such as Cut/Paste, Undo or Re-do, and the Find/Replace features. It also allows you to modify the character case (toggle between upper and lower case) and to select the whole document. See *Edit a Document* for more detail.

View - The **View** menu is used to choose how the document is displayed. See *Viewing Options for Documents, Menus and Toolbars* for more detail.

Insert – Use the **Insert** menu to insert certain references, such as current date, time, and page number. You must use the **WP** menu to insert specific references relating to a client, patient or referral source record. See *Inserting References* for more detail.

Style - The **Style** menu gives you access to defining certain attributes of selected text, including plain, bold, underline, italics and case. See *Format a Document* for more detail.

Colors – Use the **Colors** menu to choose a color for selected text or other characters. See *Format a Document* for more detail.

Paragraph – The **Paragraph** menu allows you to define or modify settings for selected paragraph(s), including line spacing, justification and alignment. It also lets you select and insert bullets, and to copy or paste the Ruler (to apply formatting from one paragraph to another). See *Format a Document* for more detail.

Format – The **Format** menu provides access to the format choices for many style-related items, including font type and font attributes, tab settings, borders, paragraph alignment, and column format. It enables you to access the style sheet dialogue box as well. See *Format a Document*.

Tools – From the **Tools** menu you can select a spellchecker, define a language for the document, display and edit the properties of the document (title, subject, author and notes) and display document statistics (word count, number of characters, paragraphs and so on). It also allows you to update or freeze 4D references in the document. See *The Tools Menu*.

About the Word Processing Toolbars

When you first access the Word Processing function, the toolbars may be hidden. You can be display one or more toolbars by selecting a toolbar from the **Toolbars** list under the **View** menu. The toolbars are designed to provide quick access to some features that would otherwise require the use of menu commands. The Toolbars will display above or below the Word Processing

menu bar, depending on the toolbar. See *Viewing Options for Documents, Menus and Toolbars* for more information.

There are 4 toolbars available under the **View** menu: the **Standard** toolbar, the **Format** toolbar, the **Style** toolbar and the **Borders** toolbar. All of the functions available on the toolbars are also available from the drop-down menus on the Word Processing menu bar.

ⓘ The unit of measure for new Word Processing documents is inches.

Standard Toolbar

The **Standard** toolbar features the following buttons from left to right: New Document, Open Document, Save Document, Print Preview, Print button, Find, Cut, Copy, Paste, Undo, Redo, View Invisible, View References, Insert Current Hour and Insert Current Date. Information on applying these commands is available from the related sections in the *Word Processing* chapter.

Format Toolbar

The **Format** toolbar includes the text alignment buttons, the line spacing buttons and the bullet button. These are also available from the **Paragraph** and **Format** menus on the Word Processing menu bar. This toolbar is displayed by default. See *Format a Document* for information on applying these commands.
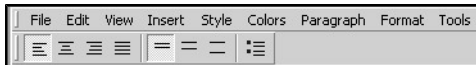
Style Toolbar

The Style toolbar offers a **Style Sheet** drop-down list, a **Font** drop-down list, a **Font** size drop-down list, and a set of 3 **Style** buttons (for bold, italic and underline styles). This toolbar is displayed by default. See *Format a Document* for information on applying these commands.
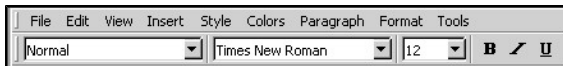
Borders

The **Borders** toolbar contains 2 sets of buttons: the individual border buttons and the frame buttons. See *Format a Document* for information on applying these commands.

Using Paragraph-Based Formatting

As is common with full-featured word processing applications, DVMAX's Word Processing facility uses paragraph-based formatting. This means that most formatting -like line spacing, justification, margins and tab stops - is applied to an entire paragraph. Every paragraph within the main body of the document will have the same formatting unless you specifically change the settings, either by highlighting a paragraph(s) and applying new formatting preferences; or by using the Copy Ruler and Paste Ruler commands to apply specific formatting to a selected paragraph.

Paragraphs are defined as text with a <RETURN> marking the end of the paragraph. The Word Processing function uses word wrap, and will automatically wrap your text down to the next line when you reach the right margin. Therefore, you should not press <RETURN> or <ENTER> at the end of a line unless you want to start a new paragraph.

Knowing how to format your document is helpful when creating new templates for items like reminder cards, where you may want to vary the paragraph formatting in different parts of the document. See *Format a Document* for more information on paragraph formatting.

Using Word Processing Templates

The word processing function can be used to create a plain document for use only for one client, patient or referral source. However, most of the documents you create using DVMAX's word processing function will be templates, meaning they will not be written for use for just one client or patient but can be used by any client or patient in the database.

A template is basically a form letter, where some elements of the document are dynamic (they can change each time the document is viewed or printed) while other parts of the document will be static (the content will stay the same). For example, in a client "Welcome" template, content like client name or address will change each time you open the template in a different client record, but the body of the letter will read the same for each client.

To create templates, you will use DVMAX's **WP** menu and various formatting options. Templates are saved as a special document class (either Protected Documents, Label Documents or Other Documents) in DVMAX, and can be accessed by any workstation on your network. See *Inserting References* and *Document Class* for more information on creating templates.

ℹ️ When you create a template, it will be available to any record of the same type as the record in which it was created. For example, if you create a form letter in a client record, that document will be available from any other client record. See also, *Document Class*.

Document Preferences and Page Setup

The document preferences and page setup options can be selected from the word processing **File** menu.

Page Setup

Selecting **Page Setup** displays the Page Setup options window, including page orientation (landscape or portrait), paper size, and page margins. You can also choose a different printer by clicking **Printer** from the Page Setup window.
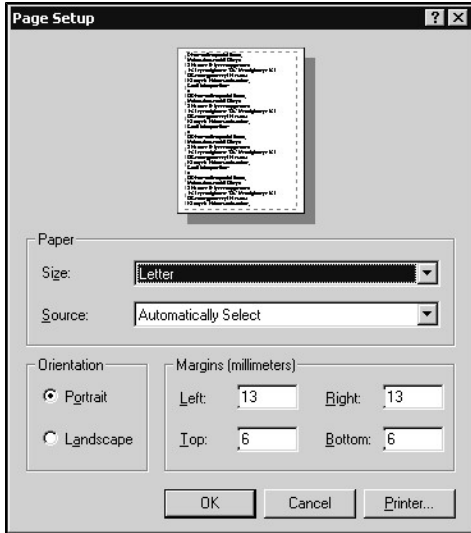
Preferences Menu

When you select **Preferences** from the word processing **File** menu, it opens a Preferences window. From the Preferences window you can set document preferences, such as ruler units (centimeters or inches), header and footer options, and widow and orphan control.
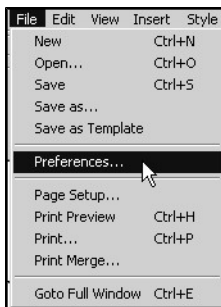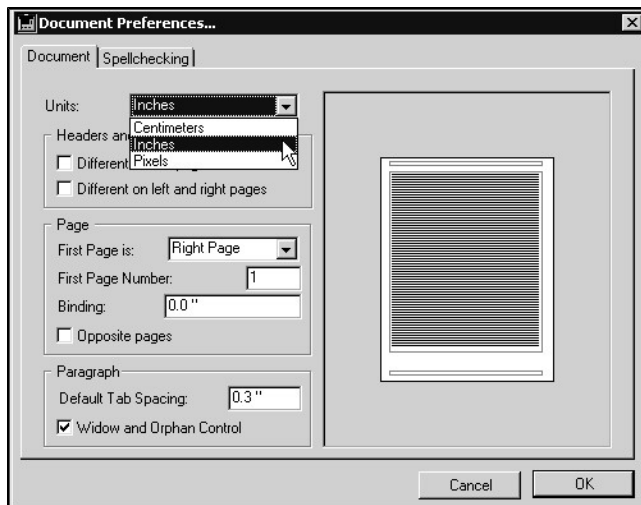

From the **Document** tab under **Preferences**, you can determine the appearance of a document, including whether headers and footers are displayed and whether a frame appears around the text area of a document on the screen.

Units

The Units option determines the unit of measurement that will be displayed on the ruler. The ruler is used to set the margins, first line indent and tabs for the document.

- From the **Units** drop-down menu under **Preferences**, select centimeters or inches.

Headers and Footers

- From the **Documents** tab under **Preferences**, select **Different on First Page** if you want to define different headers and footers for the first page and for the remainder of the document.

- From the **Documents** tab under **Preferences**, select **Different on Left and Right Page** if you want to define different header and footers for the left and right pages. If you do not select this option, the headers and footers will be the same on every page.
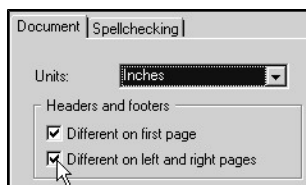
See also *Format a Document* and *View or Hide Headers and Footers* for more information on working with headers and footers.

First Page

- From the **First Page Is** option under **Preferences**, choose **Right** to set the side of the first page to the right or choose **Left** to set the side of the first page to the left.

- Type the number of the first page in the **First Page Number** box. Page numbers on the rest of the document will be updated accordingly.
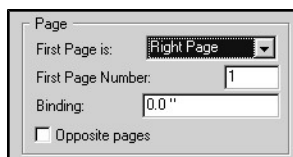
Paragraph

- In the **Default Tab Spacing** box, change the default value for tab spacing if required. This value will be applied to all the paragraphs that have no custom settings.

- Select **Widow and Orphan Control** to prevent the first line of a paragraph from being left at the end of a page. This will also prevent the last line of a paragraph from being left at the beginning of a page.

```
┌─ Paragraph ──────────────────────┐
│ Default Tab Spacing:    [0.3 "  ] │
│ ☑ Widow and Orphan Control        │
└───────────────────────────────────┘
```
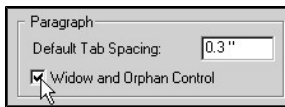
Spellchecker and Dictionaries

DVMAX comes with a built-in spellchecker and dictionary. You should not use the **Spellchecker** settings under **Preferences** under Word Processing. You will, however, want to configure the Shared Dictionary function in order to make the same dictionary available to all workstations. See *Shared Dictionary* in this User Guide.

Go To Full Window

Select **Go To Full Window** to expand the word processing window to the screen size (Mac OS) or to the size of the window of the application (Windows). In this view, the word processing menu bar temporarily replaces the DVMAX main menu bar.

Viewing Options for Documents, Menus and Toolbars

The **View** menu provides several options for how you view documents, menus and toolbars.

View Document Layout

You can have the word processor display your document on the screen. In either Normal or Page mode.
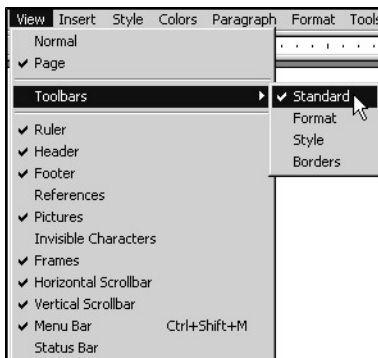
- From the **View** drop-down menu, select **Normal** to display the document as an uninterrupted series of paragraphs without columns, headers or footers. When this mode is selected, a checkmark appears next to the **Normal** option on the **View** menu.

- From the **View** drop-down menu, select **Page** to display the document as a succession of separate pages, and display text columns. When this mode is selected, a checkmark appears next to the **Page** option on the **View** menu.
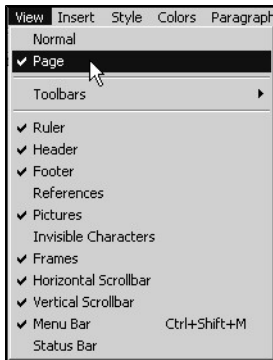
View or Hide Toolbars

Selecting the **Toolbars** option on the **View** menu displays a list of available toolbars.

- From the **View** drop-down menu, choose a toolbar from the **Toolbars** list. The toolbar will be displayed below or above the Ruler on the word processing window (depending on which toolbar you choose) and a checkmark will appear beside the name of the selected toolbar on the **Toolbar** submenu.

- Click again to hide the toolbar.

- See *About Toolbars* for information about each toolbar.

View or Hide Rulers

- From the **View** drop-down menu, select **Rulers** display the rulers. This is the default setting. When rulers are displayed, a checkmark shows next to the **Rulers** option on the **View** menu.

- Click again to hide the rulers.
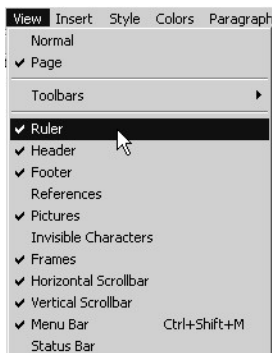
ⓘ When **Page** view is selected, both horizontal and vertical rulers are displayed on the document screen. When **Normal** view is selected, only the horizontal ruler shows.
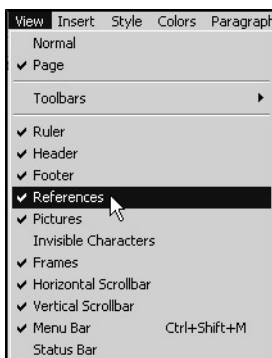
View or Hide Headers and Footers

- When in **Page** view, selecting the **Header** option from the **View** menu displays the document header area at the top of the current page (see *Documents, Headers and Footers*. When in **Normal** view, the **Header** option is not available, since **Normal** view cannot display the header area.

- When in **Page** view, selecting the **Footer** option from the **View** menu displays the document footer area at the bottom of the current page (see *Documents, Headers and Footers*. When in **Normal** view, the **Footer** option is not available, since **Normal** view cannot display the footer area. See also *Format a Document* and *Document Preferences and Page Setup* for more on headers and footers.

```
View  Insert  Style  Colors  Paragraph
   Normal
 ✔ Page

   Toolbars                           ▶

 ✔ Ruler
 ✔ Header          ▷
 ✔ Footer
   References
 ✔ Pictures
   Invisible Characters
 ✔ Frames
 ✔ Horizontal Scrollbar
 ✔ Vertical Scrollbar
 ✔ Menu Bar        Ctrl+Shift+M
   Status Bar
```
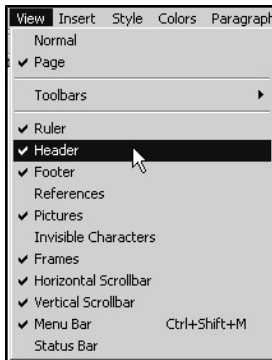
View or Hide References

By default, the computed values of references in a document are displayed. For example, if there is a client name reference inserted in your document, you will usually only see the actual name of the client associated with the record in which you are working. However, when you choose to view references, you will see the reference value, such as [Client Name]. See *Inserting References* for more on working with references.

- From the **View** drop-down menu, select **References** to display the values of the references within the current document. When **References** is selected, a checkmark appears before the **References** option on the **View** menu.
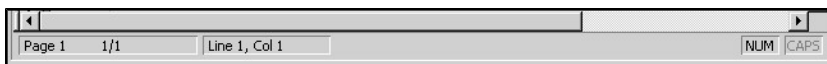
- Click again to deselect and display only the computed values of the references.

```
View  Insert  Style  Colors  Paragraph
   Normal
 ✔ Page

   Toolbars                           ▶

 ✔ Ruler
 ✔ Header
 ✔ Footer
 ✔ References      ▷
 ✔ Pictures
   Invisible Characters
 ✔ Frames
 ✔ Horizontal Scrollbar
 ✔ Vertical Scrollbar
 ✔ Menu Bar        Ctrl+Shift+M
   Status Bar
```

View or Hide Pictures

- From the **View** drop-down menu, select **Pictures** to display any pictures that may be in your document. When **Pictures** is selected, a checkmark appears before the **Pictures** option on the **View** menu.

- Click again to deselect. When **Pictures** is not selected, the document will display frames instead of pictures. This makes the display faster.

View or Hide Invisible Characters

- From the **View** drop-down menu, select **Invisible Characters** to display invisible characters, such as paragraph markers, page breaks and tabs. When **Invisible Characters** is selected, a checkmark appears before the **Invisible Characters** option on the **View** menu.

- Click again to deselect and hide invisibles.

View or Hide Frames

View **Frames** will show you the margins and borders of the document, footer and header areas, as well as any other place in the document where frames are in use.

- From the **View** drop-down menu, select **Frames** to display any frames that may be in your document. When **Frames** is selected, a checkmark appears before the **Frames** option on the **View** menu.

- Click again to deselect and hide frames.

View or Hide Scrollbars

- From the **View** drop-down menu, selecting **Horizontal** or **Vertical Scrollbar** displays the selected scrollbar. When **Horizontal** or **Vertical Scrollbar** is selected, a checkmark appears before the **Scrollbar** option on the **View** menu.

- Click again to deselect and hide the scrollbar.

View or Hide the Word Processing Menu Bar

- From the **View** drop-down menu, select **Menu Bar**. This displays the Word Processing menu bar. When **Menu Bar** is selected, a checkmark appears before the **Menu Bar** option on the **View** menu.

- Click again to deselect and hide the menu bar. When the menu bar is hidden, you can display it again either from the View menu or by pressing CTRL+SHIFT+M (Windows) or COMMAND+SHIFT+M (Mac OS).

View or Hide the Status Bar

The status bar is located at the bottom of the word processing document window. It includes information such as page, line and column numbers in relation to the position of the cursor in the document.

- From the **View** drop-down menu, select **Status Bar**. This displays the status bar at the bottom of the document. When **Status Bar** is selected, a checkmark appears before the **Status Bar** option on the **View** menu.
- Click again to deselect and hide the status bar.

Documents, Headers and Footers

Each word processing document is divided in to 3 main parts: the header, the footer and the main body of the document.

About Headers

Material that is printed at the top of each page, such as the document title or company logo, is known as the header. You must be in **Page** view to see the header. You can control when the header is printed from **Preferences** under the **File** menu on the Word Processing menu bar, located above the text area. See *Viewing Options for Documents, Menus and Toolbars* and *Format a Document* for more information on headers. You do not have to use a header in a document. Use the vertical ruler to adjust the upper and lower margins of the header.

About Footers

Material that appears at the bottom of each page of a document, such as the page number, is known as the Footer. You can control when the footer is printed from **Preferences** under the **File** menu on the Word Processing menu bar, located above the text area. You must be in **Page** view to see the footer. See *Viewing Options for Documents, Menus and Toolbars* and *Format a Document* for more information on footers. You do not have to use a footer in a document. Use the vertical ruler to adjust the upper and lower margins of the footer.

About the Main Body of a Document

The main body is the core part of the document, such as the letter portion of a client Welcome letter. The practice or clinic letterhead is typically located in the Header area.

Create a New Document

DVMAX allows you to create a single document, created exclusively for a specific client, patient or referral source record, or build a template or form letter. A form letter lets you send the same letter or reminder to a large number of recipients, while customizing details like client name, address, patient name or reminder items.

The process of creating a document is the same, regardless of whether you intend to use the letter for a mass mailing, or want to send only a single note. Depending on how you save the document, it will be saved as either a template (such as a Protected Document) or a document specific to the record in which you are working (Case Document). Most documents you work with in DVMAX will be templates, in that they will not be written for a single client or patient but can be used by any client or patient in the database.

The following steps provide an overview of the process used to create a document. Refer to the specified sections for further detail on a particular step.

To create a new document:

- From a client record, select the **Word Processing** tab or choose **Word Processing** from the **Client** drop-down menu.
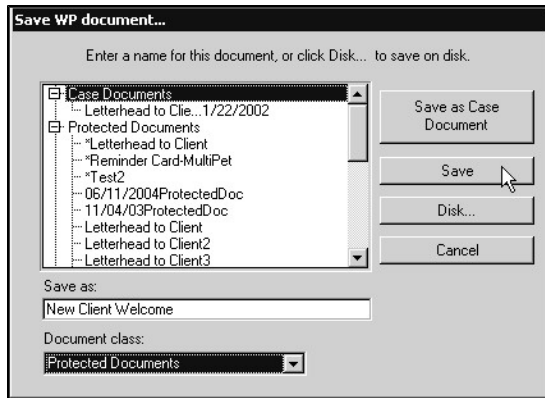
-OR-

- From a patient record, select the **Word Processing** tab, or choose **Word Processing** from the **Patient** drop-down menu.

-OR-

- From a referral source record select **Word Processing** from the **Referral Source** drop-down menu.

- From the **File** drop-down menu on the Word Processing menu bar (above the white text area), select **New**.
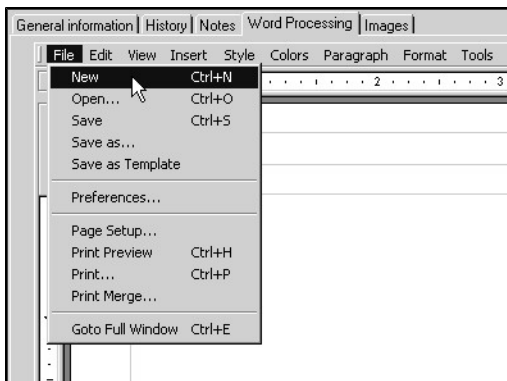
- Add text to the main body of the document. This can include typing text as well as the insertion of references from the **WP Palette** menu. See *Inserting References* for more detail.

- Make changes as needed to fonts, margins, styles or other formats. See *Format a Document*.

- Add a header and footer if needed. See *Format a Document*.

- Choose **Save As** from the **File** drop-down menu to save your document.

- From the Save WP Document window, type a name for your document.

- From the **Document Class** drop-down menu, select the type of document you have created. See *Document Class* under *Save a Document*.

- Click **Save** or **Save as Case Document** (depending on what type of document you are creating) to save the file to the database, or choose **Disk** to save the file to disk. See *Saving a Document* for more.

⚠ Before saving your document, make sure you understand the document class and save to disk options. See the section Save a Document for more information on this important issue.

Open an Existing Document

To open an existing document:

- From a client record, select the **Word Processing** tab or choose **Word Processing** from the **Client** drop-down menu.

-OR-

- From a patient record, select the **Word Processing** tab, or choose **Word Processing** from the **Patient** drop-down menu.

-OR-

- From a referral source record select **Word Processing** from the **Referral Source** drop-down menu.
- From the list of documents on the Word Processing window bar, click to select a document, then select **Open**, or double click on a document to open.
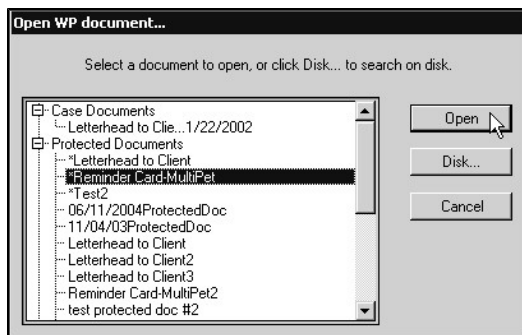
Open a Document on Disk

To open a document located on a disk drive, USB drive, or other similar media:

- From the Word Processing tab, choose **Disk**.
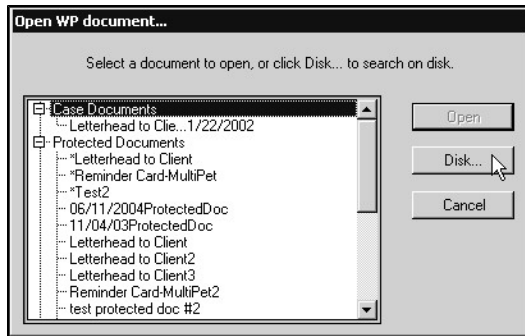
- From the Import window, select the document you want to import and click **Open**.

-OR-

- From the Import window, double click on the document you want to open.

Edit a Document

You can make changes to any type of document, regardless of the Document Class. Then, you can choose to save the document under a new file name or under the same file name and document class, replacing the older version. You can use any of the formatting features to add to a document or delete sections of a document.
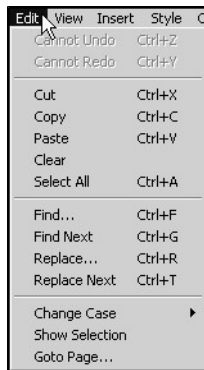
The **Edit** menu on the Word Processing menu bar contains several options that are useful for editing, moving and replacing parts of a document. The **Edit** menu options are described in general below and should be familiar to those who have worked with other word processing applications.

Undo Action – Word Processing

Selecting **Undo Action** from the **Edit** menu reverses your last action on the document. If the last action cannot be undone, the **Undo Action** option becomes **Cannot Undo Action**. The **Cannot Undo Action** menu option cannot be selected and does not perform an action.

Redo Action – Word Processing

Selecting **Redo Action** from the **Edit** menu repeats the last action you cancelled on the document. If the last action cannot be repeated, the **Redo Action** option becomes **Cannot Redo Action**. The **Cannot Undo Action** menu option cannot be selected and does not perform an action.

Cut – Word Processing

Selecting **Cut** from the **Edit** menu deletes the current selection and places it in the clipboard.

Copy – Word Processing

Selecting **Copy** from the **Edit** menu copies the current selection and places it in the clipboard.

Paste – Word Processing

Selecting **Paste** from the **Edit** menu inserts a copy of the contents of the clipboard at the location of the insertion point (where you place the cursor), or replaces a selection (such as a selected paragraph) with the contents of the clipboard if anything is selected. Use this in conjunction with the **Cut** and **Copy** functions to move, copy or remove sections of text.

ⓘ If the contents of the clipboard are an image, DVMAX will display a Paste Picture window. This window lets you to choose where the picture will be pasted.

Delete – Word Processing

Selecting **Delete** from the **Edit** menu deletes the current selection.

Select All – Word Processing

Choosing **Select All** from the **Edit** menu selects all of the elements present in the area being edited (characters, tables and pictures).

ⓘ If **Page** view is selected, and the cursor is located in either the header or footer area, only the contents of that area will be selected.

Find – Word Processing

Selecting **Find** from the **Edit** menu opens the Find window. The Find function is used to search the current document for specified characters, styles, borders, or formatting.

To search for specified text or characters in your document:

- From the **Edit** drop-down menu, select **Find**.

- In the Find window, type the character or text you want to find in the **Find** box. Use the additional style options to conduct style, border or format searches.

- Click **Find**. The first instance in the document that matches the search parameters will be returned.
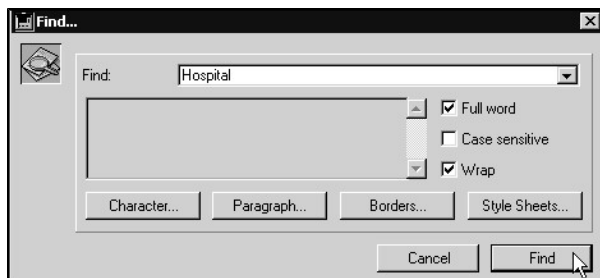
Find Next – Word Processing

Selecting **Find Next** triggers a search based on the last character or format search you performed. See *Find* for more on running a search.

Replace – Word Processing

Selecting **Replace** from the **Edit** menu opens the Replace window. The Replace function lets you locate and replace specified text, characters, styles and more.   It is similar to the Find function, except that in addition to finding characters, text, formats or styles, you can replace those instances with new text.

To search and replace text or characters in your document:

- From the **Edit** drop-down menu, select **Replace**.

- In the Replace window, type the character or text you want to find and replace in the **Replace** box. Use the additional style options to conduct style, border or format searches.

- In the **With** box, type the character or text you want to use to replace the existing text. Use the additional style options to set style, border or format options for the new text.

- Click **Replace** or **Replace All**.
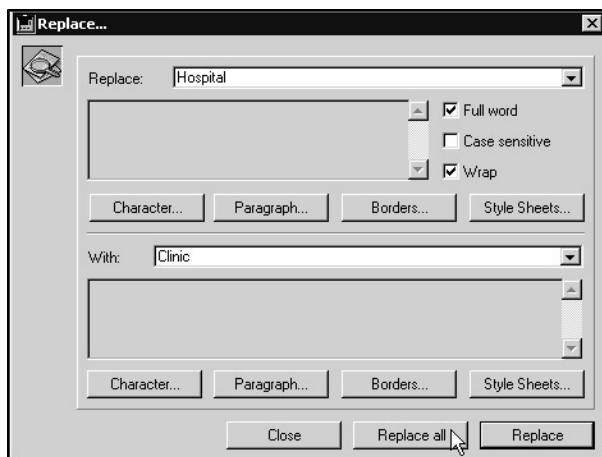
Replace Next – Word Processing

Selecting **Replace Next** triggers a find and replace based on the last character or format search you performed. See *Replace* for more on running a search.

Saving a Word Processing Document

DVMAX allows you 2 options when saving documents: **Save** or **Save As**. As well, you can choose to save the document either to the database, so that all workstations may access the document, or save the file to disk.

🛈

If you are not sure if you should select **Save** or **Save As**, choose the **Save As** command and follow the steps outlined under **Save As**. The **Save As** command will always prompt you with a

message in a Confirm window if you are about to overwrite an existing file with the current document.

Save – Word Processing Option

Selecting **Save** saves the current document at its current location. Use this option if you are saving changes to an existing document, using the same file name and **Document Class** settings (see *Document Class*). If you are saving a new document, selecting **Save** behaves like **Save As**, and a Save WP Document window opens. You will need to choose a file name and a Document Class. To save a new version of an existing document (separate from the original) or to save a file to disk, choose **Save As**.

To save a document using **Save**:

- From the **File** drop-down menu, choose **Save**.
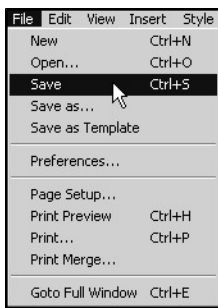
- The current document will be saved, overwriting the existing file. No further message is displayed.

If you use the **Save** command to save a Protected Document, the Save WP Document window opens, and DVMAX defaults the **Document Class** to Case Document in order to prevent accidental overwriting of Protected Documents. See Overwriting Protected Documents for more information.

Save As – Word Processing Option

Selecting **Save As** opens the Save WP Document window. Use this option if you are saving a new document, saving a Protected Document or saving an existing document under another name.

To save a document using **Save As**:

- From the **File** drop-down menu, choose **Save As**.
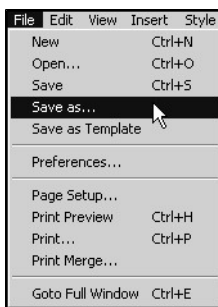
- On the Save WP Document window, type a name for the document. Select **Disk** to save the file to disk. See also, *Saving to Disk*.

Save as:
Letterhead to Client

ⓘ Placing an asterisk (*) before the name of a document will automatically make the document a Protected Document. Protected Documents named with an asterisk will appear at the top of the list of Protected Documents. If you are overwriting an older version of protected document whose file name contained an asterisk, make sure the asterisk is included in the new file name. DVMAX automatically removes this asterisk to prevent accidental overwriting of protected documents.

ⓘ Double clicking on the original protected document name in the document list will ensure that both of the documents (old and new) will have the same name.

- From the **Document Class** drop-down list, choose a document class. For more information, see *Document Class*.

Document class:
Protected Documents
Case Documents
Protected Documents
Label Documents
Other Documents
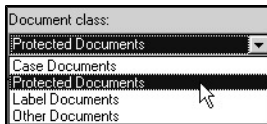
- Click **Save** to save the document to the database. Files saved as Protected Documents, Label Documents or Other Documents will be available from any record of the same type in the database. For example, if you save a Label Document from a client record, it will be available from any other client record.

Save WP document...

Enter a name for this document, or click Disk... to save on disk.

Case Documents
  Letterhead to Clie...1/22/2002
Protected Documents
  *Letterhead to Client
  *Reminder Card-MultiPet
  *Test2
  06/11/2004ProtectedDoc
  11/04/03ProtectedDoc
  Letterhead to Client
  Letterhead to Client2
  Letterhead to Client3

Save as:
Letterhead to Client

Document class:
Protected Documents

Save as Case Document

Save

Disk...

Cancel

-OR-

- Click **Save As Case Document**. This will save the file as a Case Document, regardless of what you selected from the **Document Class** list. As Case Document is only available from the record in which it was created.
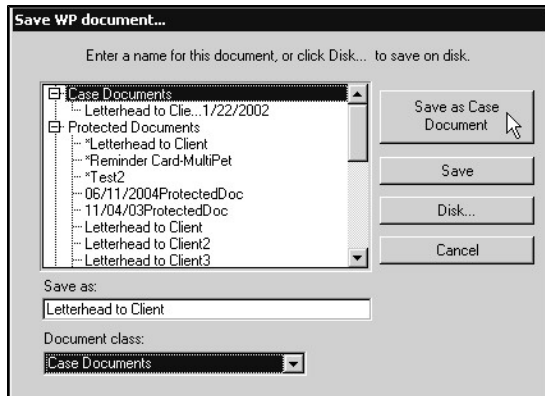
⚠️ If you choose to use the same name and Document Class as the original file, you will over-write the original file with the current document. This is true for documents from all Document Classes. See Document Class for more information.

Document Class in Word Processing

The **Document Class** drop-down list from the Save WP Document window allows you to select the type of document you want to save. The class you select from determines how the document is stored. DVMAX provides 4 document classes: **Case Documents**, **Protected Documents**, **Label Documents** and **Other Documents**.

Case Documents in Word Processing

Case Documents are specific to a selected client, patient or referral source record and are only available from the record in which they were created. When you save a document, DVMAX defaults to Case Document as the document class. If you have created a form letter, label or other template that you would like to make available from any client, patient or referral source record, you must save the document as either a **Protected**, **Label** or **Other** document class.

Save as a **Case Document** when:

- The document you are saving is only intended for the record in which you are working, save it as a **Case Document**.

- **Do not** save it as a Case Document if you intend to use the document as a template to create form letters, reminder card or similar documents, see *Protected Documents*, *Label Documents* and *Other Documents*.

⚠️ When you save a document as a **Case Document**, any reference values that may be inserted in the document are replaced with the computed reference (actual data from a record) and cannot be reversed.

Protected Documents in Word Processing

Protected Documents are templates, meaning they are not written for use by just one client or patient but can be used by any client or patient in the database. Unlike Case Documents, these types of documents contain references inserted using DVMAX's **WP** menu. These references will automatically pull in the appropriate information from a record and display it in the doc-ument, customizing the document for each reader while allowing you to leave the body of the letter or other document the same. See *Using Templates* for more on templates.

When you save a new document as a **Protected Document**, it stores that document in a **Protected Documents** directory and prevents you from accidentally overwriting the template using a series of security measures. This is especially useful if your practice keeps a variety of forms on file and uses them to generate documents such as referral letters.

If you make changes to a protected document and then choose **Save** or **Save As**, the document class will default to **Case**, keeping the template from being overwritten. To overwrite the existing **Protected Document**, you must make sure the file has the same name as the original document and then choose **Protected Document** from the **Document Class** drop-down menu. DVMAX then confirms that you intend to overwrite the protected document. See *Overwriting Protected Documents* for more information.

Save as a **Protected Document** when:

- The document can be used as a template for creating form letters, reminder cards, referral letters and similar documents.

- The document you are saving is a key template used in generating letters, reminders or similar material in your practice. Templates can also be stored under **Label Documents** or **Other Documents**, but the Protected Documents designation offers extra default security settings to prevent accidental overwriting for core templates.

- You want to access the template from any record that is of the same type as the record in which it was created. For example, a Protected Document created in a client record can be accessed from any other client record.

- Consider using **Label Documents** if this is a template used for creating labels. This may help you organize your template documents more efficiently.

- Consider using **Other Documents** if this template is not among the documents you use heavily, or if you want a way to further organize your special template files.

- If the document is not a template, see **Case Documents**.

Label Documents in Word Processing

Label Documents are templates you create for use in generating custom labels. They are similar to **Protected Documents** in that they are templates that can be used by any client or patient in the database. When you choose **Label Documents** from the **Document Class** menu, the document will be saved under the **Label Documents** directory. This helps sort regular **Protected Documents**, like letters and reminders, from templates used for generating labels.

When you save an existing Label document, the default **Document Class** is **Label Documents**. If you try to overwrite an existing **Label Document**, you will be asked to confirm that you want to overwrite the file.

Save as a Label Document when:

- The document can be used as a template for creating labels.

- Consider using **Label Documents** if this is a template used for creating labels. This may help you organize your template documents more efficiently.

- You can also save label templates under **Protected Documents** and **Other Documents**.
- If the document is not a template, see **Case Documents**.

Other Documents in Word Processing

Other Documents are also types of templates or forms. You can use this document class to save templates that may not be part of your main list of client, patient or referral letters, or if you want to keep certain types of templates in a separate directory.

When you replace an existing Other document with a more current version (using **Save As**) the default **Document Class** will be **Other Documents**. If you try to overwrite an existing **Other Document**, you will be asked to confirm that you want to overwrite the file.

- The document can be used as a template for creating form letters, reminder cards, referral letters and similar documents.
- You want to further organize your template documents in to different directories.
- The document is a template that is not part of your core or heavily used templates. Consider saving your core templates as **Protected Documents**.
- Consider using **Label Documents** if this is a template used for creating labels. This may help you organize your template documents more efficiently.
- If the document is not a template, see **Case Documents**.

Save As Template Option in Word Processing

Under the File menu on the Word Processing menu bar there is a Save as Template command. DVMAX uses a special naming system for document types. Document templates can be saved as one of three **Document Classes**: Protected, Label and Other Documents. You must use one of these options when saving a template. See *Document Class*.

Overwriting Protected Documents in Word Processing

Protected Documents are template documents used for creating letters, reminder cards and similar documents. They are typically considered part of your core or most heavily used templates, and it is important to take care not to accidentally overwrite those documents.

To help prevent accidental overwriting, DVMAX provides some default settings that are selected on the Save WP Document window when you try to overwrite a Protected Document.

To overwrite a Protected Document:

- From the **File** menu, click **Save** or **Save As**.
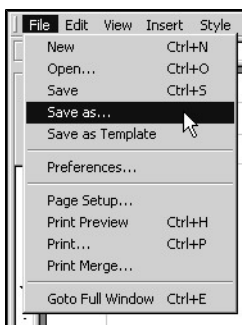
- If you chose **Save** from the File menu, DVMAX provides a note in red font on the Save WP Document window indicating that the Document Class was changed to **Case Document**.
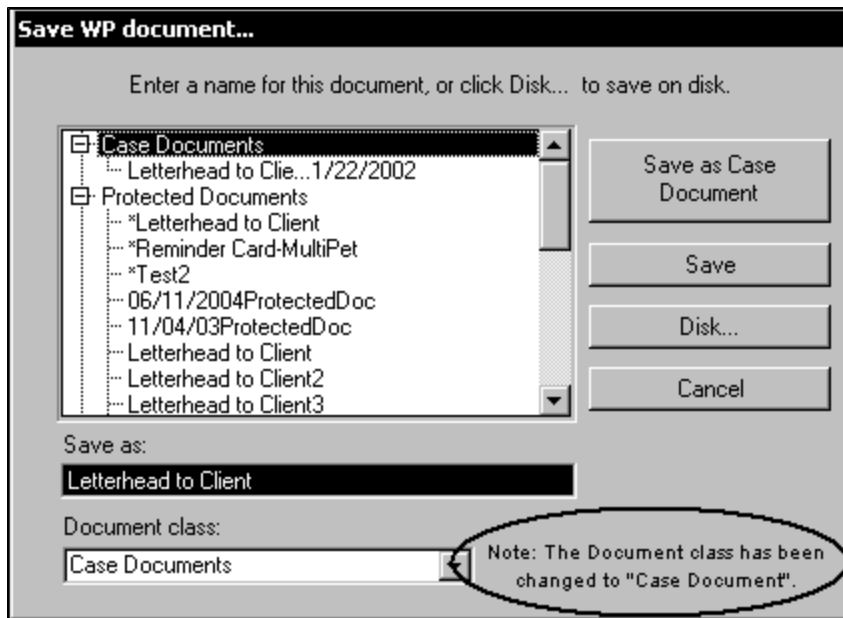
- If you select **Save As**, the **Document Class** defaults to Case Document, but no notice in red font is provided on the Save WP Document window.
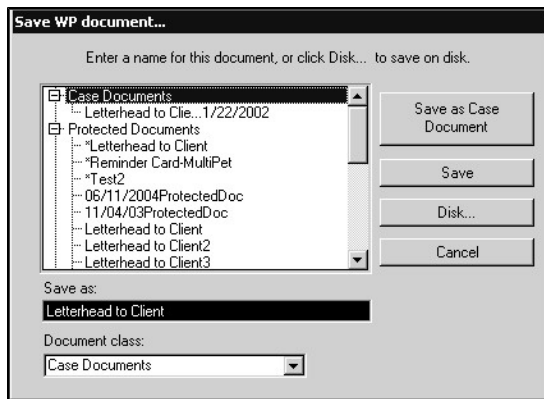
- To overwrite the current Protected Document, do not change the document name in the **Save As** box. If the current Protected Document begins with an asterisk (*), make sure the document name in the **Save As** field also contains an asterisk (*) if you plan to overwrite.

- If you want to create a new protected document, type a new name for the file in the **Save As** box.

- To save the document as a Protected Document, choose **Protected Document** from the **Document Class** drop-down menu. This is essential if you want to overwrite the original protected document. Otherwise, the current document will be saved as a Case Document, while the original Protected Document will remain unchanged in the Protected Documents directory.
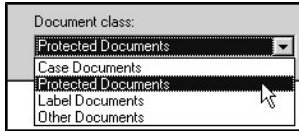
- Click **Save**.
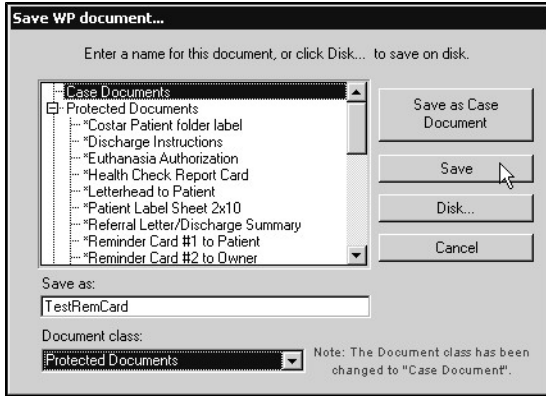
- A Confirm window opens.
- From the Confirm window, choose **Overwrite** to replace the previous version of the Protected Document with the current Protected Document.
- Click **Re-enter** if you would prefer to give the document a different name. This will take you back to the **Save a WP Document** window.
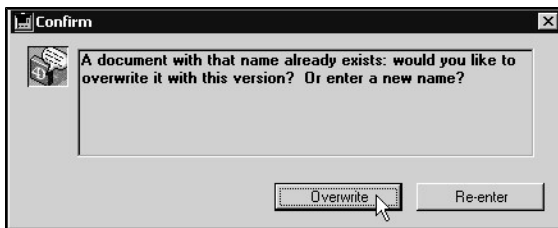
Saving a Word Processing Document to Disk

To save a document to disk:

- From the Save WP Document window, click **Disk**.
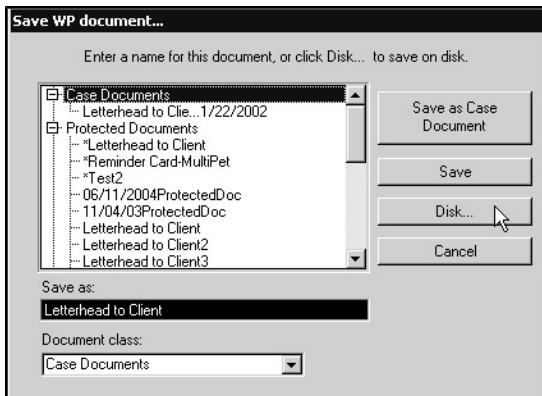
- On the Export window, select the location where you would like to save the file.

- In the **File Name** box, type a name for the document.

- Click **Save**.

ⓘ Documents saved this way are only accessible on the workstation or media (such as disk or CD) on which they have been saved.

Freeze a Word Processing Document

See *The Tools Menu*.

Close a Word Processing Document

To close a Word Processing document:

- Use the **Save** or **Save As** command from the File menu to save the document first, as needed. If you leave the document page without saving, any changes you made will be lost.

- You may then either use the **Open** command to open a new or existing document.

- If you want to exit WP, click **Cancel** at the bottom of the WP window

- The current document automatically closes.

Print or Preview a Word Processing Document

You can print or preview documents you have created. As well, you can use the **Print** and **Print Merge** functions to print a copy of the current document for a selected set of records.

Print a Word Processing Document

To print a document:

- From the **File** drop-down menu, select **Print**.
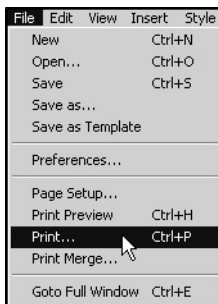
- From the Print window, make any adjustments needed, such as print quantity and print quality.

- On the Print window, click **Print**.
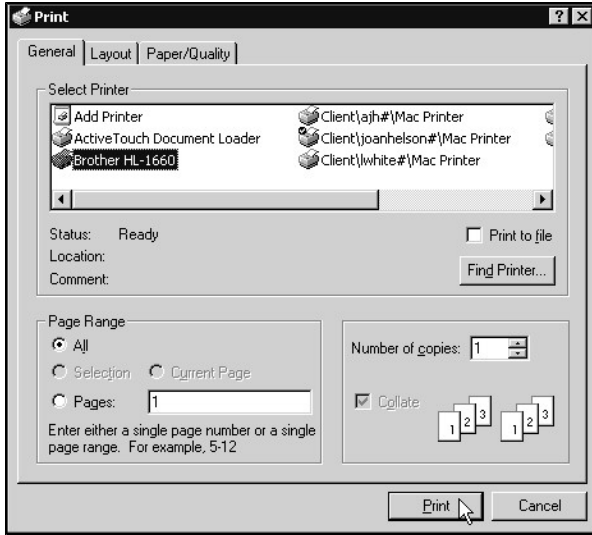
Print Preview a Document in Word Processing

To preview the document:

- From the **File** drop-down menu, select **Print Preview**.
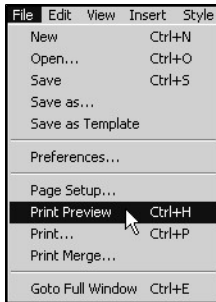
- The Print Preview window opens. The Preview window displays the document as it will be printed. It also allows you to start or cancel the printing.
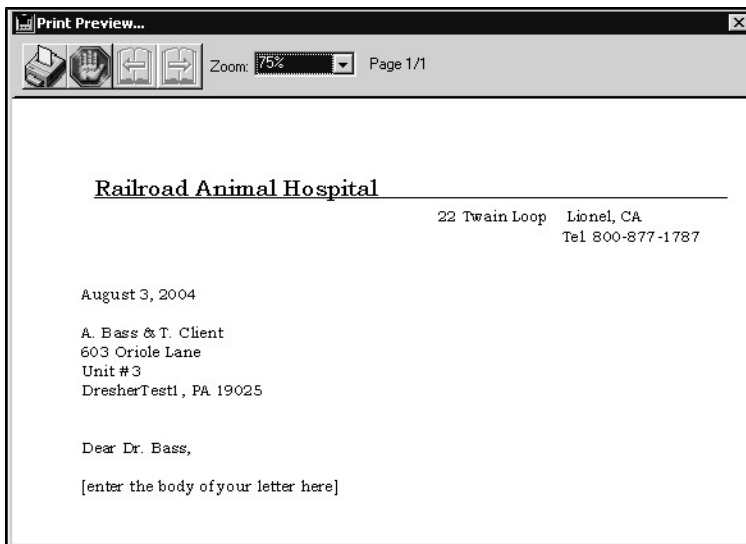
Print Merge Option in Word Processing

The **Print Merge** function can be used when you want to perform a large mail out, such as mailing Welcome letters or reminder cards. To use this function, you must first have a selection of client, patient or referral source records for which you plan to generate letters or reminders. For example, you may want to send a personalized Welcome letter to a selection of new clients.

To print a copy of the current document for each record in your selection of records:

- Make sure you have generated a list of clients, patients or referral sources to whom you would like to send a personalized copy of the current document.

- From the **File** menu on the Word Processing menu bar, select **Print Merge**.
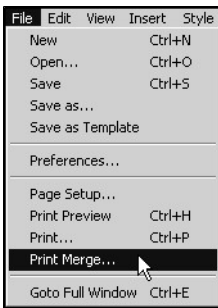
- From the Print window, make any adjustments needed, such as print quantity and print quality.

- On the Print window, click **Print**.
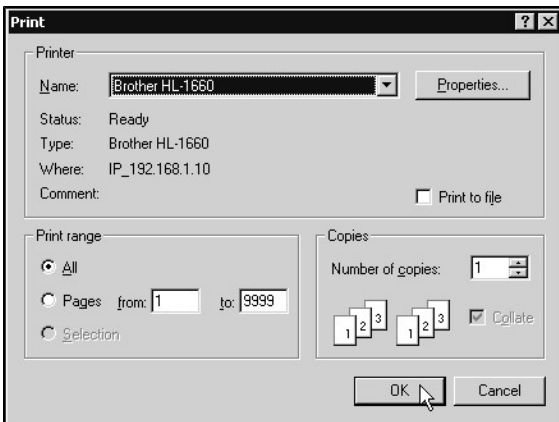
Format a Word Processing Document

There are a large number of formatting options available when creating a document. Most of these options will be familiar to you if you have experience with any major word processing application. The formatting options are described in general below. See also, *Document Preferences and Page Setup*.

Many of the formatting options can be accessed from both the toolbars (see *About the Toolbars*) and from the drop-down menus on the Word Processing menu bar.

Document formatting options can usually be applied to selected text, entire paragraphs; or they can be applied to the full header, footer or body of a document. This means that formatting

options such as font, alignment, margins and tabs can change throughout a document depending on the sections to which you choose to apply the attributes. See Using Paragraph-Base Formatting.

Selecting Paragraphs in Word Processing

- To select a single paragraph, click anywhere in the paragraph.

- To select several paragraphs, drag through the paragraphs to select them.

- To select every paragraph in the body of a document, choose **Select All** from the **Edit** drop-down menu.

Adjusting the Font Style, Size and Other Text Attributes

You can customize the font or fonts you want to use in your document. You can adjust font, size, color, style and other text attributes. There are font and text attribute buttons located on the **Style** toolbar, as well as **Format**, **Style** and **Colors** menu options that you can use to select attributes.

Selecting a Font

All fonts available for use in your document can be viewed from the **Format** drop-down menu. If the **Style** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can select a font from the drop-down list on the toolbar.

To select or change a font:

- Select the text you want to change, or click where you want to type text using a new font.

- From the Font list on the **Style** toolbar, select a font.

-OR-
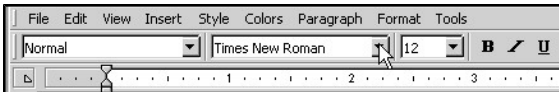
- From the **Format** drop-down menu, choose **Character**.
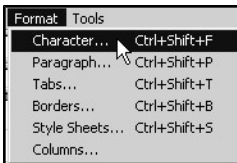
- From the **Font** list on the Character window, select a font.
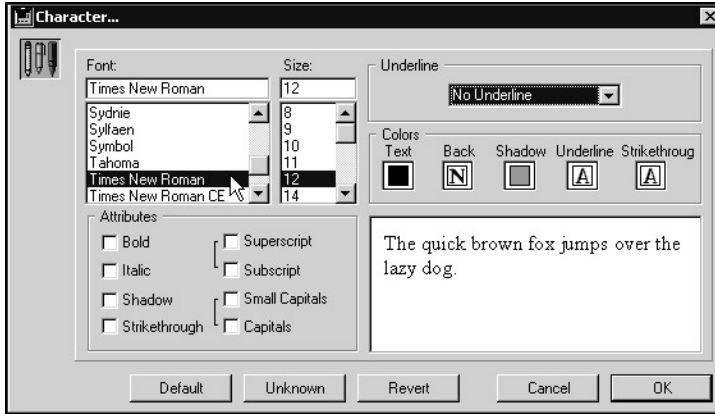
● Click **OK** from the Character window to apply the font selection.

Choosing Font Size

Text size is measured in points. A point is approximately 1/72 of an inch. The font size drop-down list shows sizes ranging from 8 to 72 points. Text size can be adjusted from the **Format** drop-down menu. If the **Style** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can select a text size from the drop-down list on the toolbar.

To select or change a font:

● Select the text you want to resize, or click where you want to type using a different size text.

● From the font size list on the **Style** toolbar, select a font.

-OR-
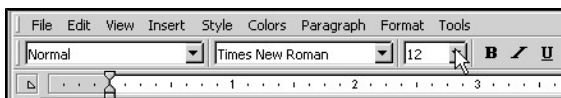
● From the **Format** drop-down menu, choose **Character**.
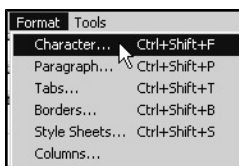
● From the **Size** list on the Character window, select a font size.
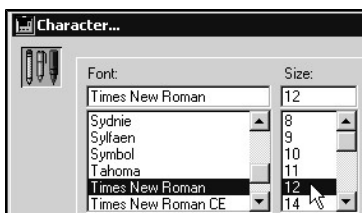
● Click **OK** from the Character window to apply the font size.

ⓘ You can directly type a size value in the size box if you would like to assign a size that is not shown on the drop-down list. The size must be between 1 and 255.

Choosing a Font Style

Font styles can be used to emphasize or enhance the appearance of text in your document. Common examples of font styles are **Bold**, Underline and *Italics*. Font style can be adjusted from the **Format** or **Style** drop-down menus. If the **Style** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can select a style using the style buttons on the toolbar.

To select or change a font style:

- Select the text you want to appear in a different style, or click where you want to type using a different style.

- From the font style buttons on the **Style** toolbar, select a style. Note you can only select **Bold**, **Underline** or **Italics** from the toolbar. To choose other options, use the **Format** menu.

-OR-

- From the **Style** drop-down menu, select a style.

-OR-
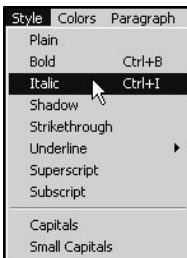
- From the **Format** menu, choose **Character**.
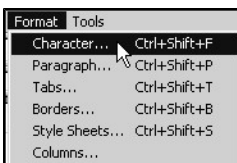
- From the Character window, select a style from the Attributes area. If you select Underline, use the **Underline** drop-down menu to choose an underline style.
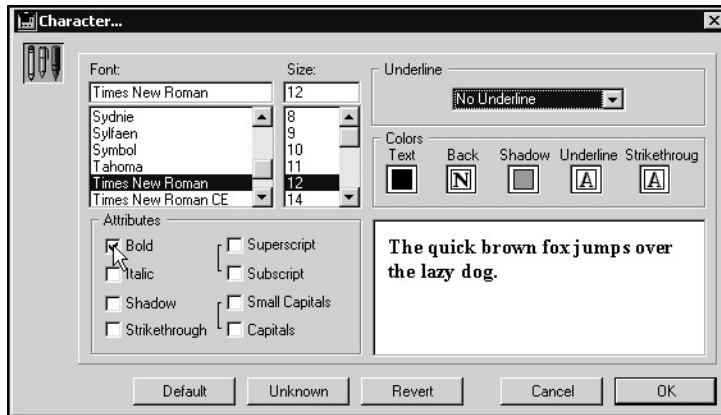
- Click **OK** from the Character window to apply the style.

Changing Several Text Attributes at Once

If you have several changes to make to the attributes of a selection of text, you can make those changes from a single menu. The Character window, which opens when you select **Character** from the **Format** menu, lets you adjust font, size, style, color and underline style. It also lets you preview the changes you are making before you apply them to the selected text.

To make changes to several attributes at once:

- Select the text you want to change, or click where you want to type using selected attributes.

- From the **Format** menu, choose **Character**.
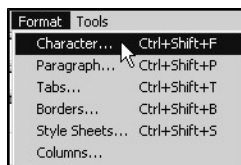
- From the Character window, select a font type, text size, font color and style.

- Click **OK** from the Character window to apply the attributes.

Aligning Text

You can align text with the left or right margin of a document, center text between the left and right margins, or justify the text so it is aligned with both the left and right margins. Text alignment can be adjusted from the **Format** or **Paragraph** drop-down menus. If the **Format** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can select an alignment using the buttons on the toolbar.

The alignment will apply to the paragraph or paragraphs you select. The default value is left justified.

- To align text to the left, select the **Left Align** icon from the **Format** toolbar, or choose **Align Left** from the **Paragraph** drop-down menu.
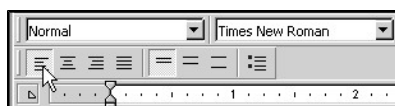
- To align text to the right, select the **Left Right** icon from the **Format** toolbar, or choose **Align Right** from the **Paragraph** drop-down menu.
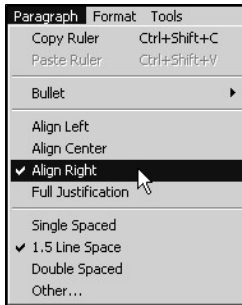

- To center text between the left and right margins, select the **Align Center** icon from the **Format** toolbar, or choose **Align Center** from the **Paragraph** drop-down menu.

- To apply full justification, select the **Full Justification** icon from the **Format** toolbar, or choose **Full Justification** from the **Paragraph** drop-down menu.

ⓘ You can also access the justification attributes from the **Format** drop-down menu. If you are making several changes to a paragraph (alignment, line spacing, bullets and indentation) select **Paragraph** from the **Format** menu.

Creating Bullets in a Word Processing Document

You can add bullets to your document from three different places in the Word Processing facility. Bullets can be added from the **Format** or **Paragraph** drop-down menus. If the **Format** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can add bullets using the **Bullet** icon on the toolbar.

Bulleted text formatting will be applied to all selected paragraphs. To add bullets:

- Click the **Bullet** icon from the **Format** toolbar. This will create bulleted text using the default bullet selection. Use the **Paragraph** drop-down menu to select a different bullet style.
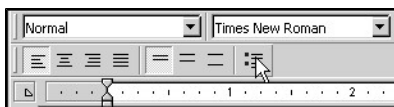
-OR-

- From the **Paragraph** drop-down menu, select **Bullet**; then select a bullet style from the **Bullet** drop-down list.
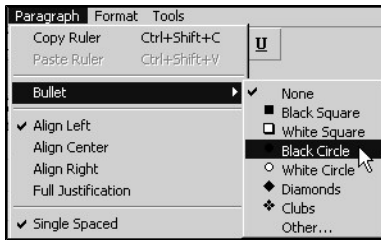
- To select a custom bullet style, choose **Other** from the Bullet list.   From the Special Character window, choose a bullet character.

ⓘ You can also add bullets from the **Format** drop-down menu. If you are making several changes to a paragraph (bullets, alignment, line spacing and indentation), select **Paragraph** from the **Format** menu.

Setting Line Spacing

You can set the line spacing used between lines within a paragraph. Line spacing can be adjusted from the **Format** or **Paragraph** drop-down menus. If the **Format** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can set the line spacing using the line spacing buttons on the toolbar.

The spacing will apply to the paragraph or paragraphs you select. The default value is single-spaced. To adjust line spacing:

- To apply single spacing, select the **Single Spaced** icon from the **Format** toolbar, or choose **Single Spaced** from the **Paragraph** drop-down menu.

- To apply double spacing, select the **Double Spaced** icon from the **Format** toolbar, or choose **Double Spaced** from the **Paragraph** drop-down menu.
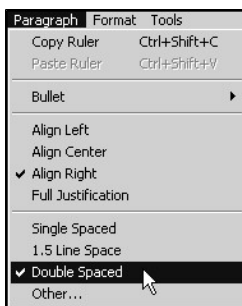
- To apply one and one half (1.5) line spacing, select the **1.5 Line Space** icon from the **Format** toolbar, or choose **1.5 Line Space** from the **Paragraph** drop-down menu.

- To apply custom line spacing, select **Other** from the **Paragraph** drop-down menu. From the Other Line Spacing window, type a value for the line spacing

in the **Size** box. As with any line spacing selection, the line spacing you type will be applied to the selected paragraphs.

ⓘ You can also access the line spacing attributes from the **Format** drop-down menu. If you are making several changes to a paragraph (line spacing, alignment, bullets and indentation), select **Paragraph** from the **Format** menu.

Setting Margins and First Line Indent

You can use the Ruler to quickly and easily set the left and right margins for selected paragraphs. On the horizontal Ruler, grey triangles mark the left and right margins and first line indent. You may have several different margin settings in a single document. Select the paragraph to which you want to apply margin settings, then set the margins for that paragraph.

You can change the location of the left margin, the right margin, and the first line indent by dragging their markers to the left or right. All three markers move independently and you can position the left and right margins to within an inch apart. You can also adjust the upper and lower margins of the header, footer and main body of the document using the vertical Ruler.

Left and Right Paragraph Margins

The default margins for a new document are based on a standard 8.5 inch by 11 inch paper. Left and right margins are 1 inch (2.5 cm) from the edge of the page. You can adjust those values as long as you don't set them beyond the physical edges of your paper size. The Left and Right margin markers are represented by upward facing triangles located along the bottom edge of the Ruler.

To set the left or right margin using the Ruler:

- Select the paragraph or paragraphs to which you want to apply the margin settings.
- Drag the Left or Right margin marker to the desired position.
- Dotted lines display down the page as guides to help you align margins.
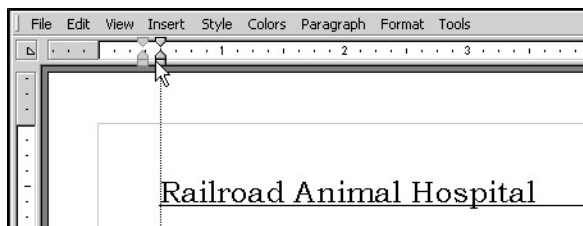
First Line Indent

The indent marker, represented on the by a downward facing triangle along the top edge of the Ruler, tells you where the first line of text in a selected paragraph will begin. If you do not want a first line indent, leave the indent marker in the same position as the left margin marker.

To set the first line indent:

- Select the paragraph or paragraphs to which you want to apply the first line indent setting.

- Drag the First Line Indent marker to the desired position.

- Dotted lines display down the page as guides to help you align margins.

Adjusting the Top and Bottom Margins

You can use the vertical Ruler to adjust the upper and lower margins of the header, footer and main body of the document. To adjust the top and bottom margins:

- Position the cursor within the part of the document whose vertical margins you want to adjust. For example, if you want to adjust the upper and lower margins of the header, position the cursor in the header area.

- The vertical limits of the document, header or footer are displayed on the vertical ruler.

- Place the mouse cursor over the upper or lower limit of the area on the vertical ruler. The cursor becomes a double-sided arrow.

- Drag the upper or lower limit of the area to its new location. The footer, header or document area is then resized accordingly.

- See also, *Adding Headers and Footers* for more on adjusting vertical limits.

Tabs

Tabs allow you to line up blocks of text and numbers. Understanding how to set and adjust tabs is very useful, especially when creating new templates for reminder cards and other documents that can contain a variety of types of paragraphs. You can set different tab stops for different paragraphs.

About Tab Default Settings

By default, new documents are preset with tab stops every 0.5 inches across the page. You can use these tab stops even though they do not appear on the ruler. Press TAB to move the insertion point to the next tab stop. You can also set other tab stops anywhere along the ruler. The default spacing between tabs can be set from **Preferences** under the **File** drop-down menu.
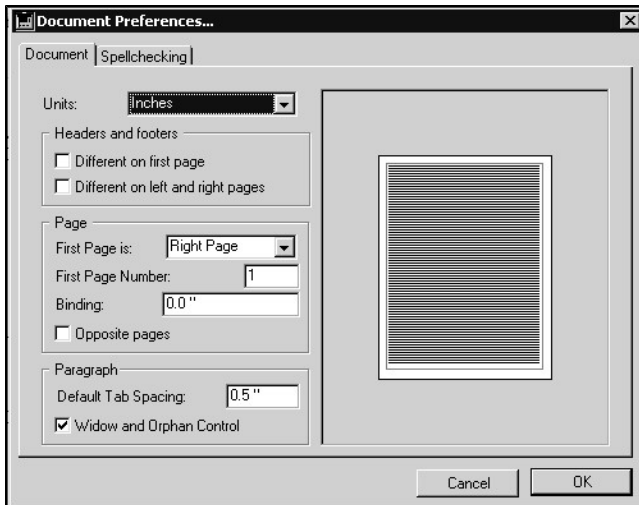
ⓘ When you set a tab stop, any preset tab stops to the left of it are removed.
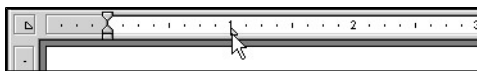
Creating Tabs Using the Ruler

You can set tabs easily using the Ruler, or define tabs from the **Tabs** option under the **Format** drop-down menu.

To set tabs using the Ruler:

- Select the paragraph or paragraphs to which you would like to apply the tab settings.

- Select the type of tab you want to use from the Tabs drop-down menu located on the left of the Ruler. There are 5 different tab stops.

- Click in the Ruler to insert the tab stop. The tab stop is inserted where you click. You can modify its location by dragging it in the Ruler.

- To delete a tab marker, drag it anywhere below the Ruler.

Creating Tabs Using the Format Menu

To create tab stops using the Format menu:

- From the **Format** drop-down menu, select **Tabs**.
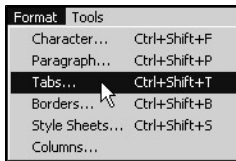
- A Tabs window opens. All tabs for the current paragraph are listed. Types of tab markers are listed under the Alignment area (see *Tab Types*). Types of fill characters are listed in the Leading area.

- Click **Add** to create a tab stop. This creates a new entry in the Tabs area. To delete a tab, select a tab from the Tabs area and click **Delete**.
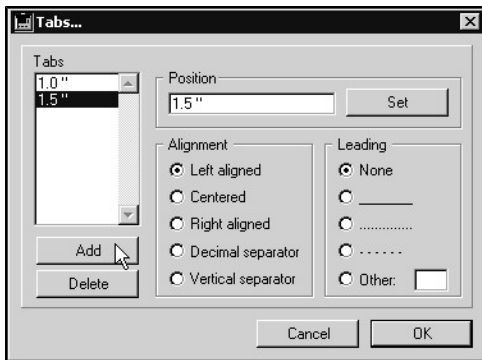
- Type a new position value in the **Position** box. The value will be in inches or centimeters, depending on the Document **Units** you selected under **Preferences**. The default is inches.

- Click **Set**. The new position for the tab is updated in the Tabs area.

- Select the alignment you want for the new tab from the Alignment list.

- If you want a lead line associated with your tab (such as the dotted lines leading to a page number in a Table of Contents), choose a leader style from the Leading list. The default value is **None**. Note that you can choose a custom fill type by clicking the **Other** and selecting the fill character you want.

- Click **OK**. The tab you added will appear on the Ruler.
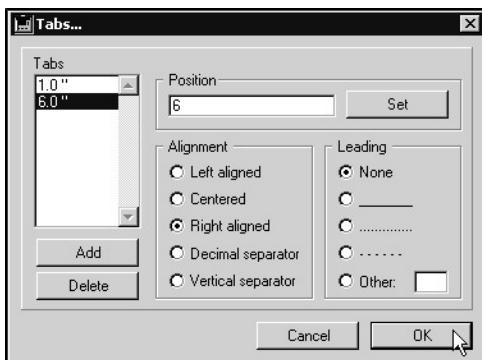
ⓘ Double click on the Ruler to display the Tabs window. The tab markers for the current Ruler are listed. Select the tab you want to modify from the list.

Tab Types

There are 5 tab options available in the word processing function:

Left-Aligned – Text typed after this tab stop will be left-aligned.

Right-Aligned – Text typed after this tab stop will be right-aligned.

Center-Aligned - Text typed after this tab stop will be center-aligned.

Decimal – Creates a decimal separator.

Vertical Separator – Similar to a left-aligned tab stop but a vertical separator is also displayed at its location. This is mainly used in tables.

Adding Headers and Footers

To add a header or footer to your document:

Choose **Page** from the **View** menu. Your document must be in **Page** mode to work with headers and footers.

- Type the text you want in the header or footer. In addition to text, you can add pictures, references or the current date or page number.

- To resize a header or footer, click in the Header or Footer area. The vertical limits of the area are displayed on the vertical ruler.

- Place the mouse cursor over the upper or lower limit of the area. The cursor becomes a double-sided arrow.

- Drag the upper or lower limit of the area to its new location. The footer or header area is then resized accordingly.
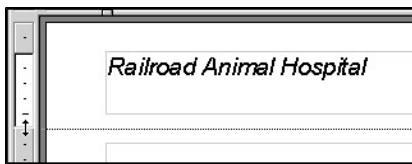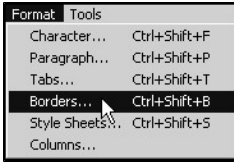

Borders and Frames

To apply a border:

- Select one or more paragraphs from the document.

- From the Borders toolbar, choose the location where you would like the border or frame to be placed around the selected text. You must use the **Format** menu to adjust the style of border or frame.
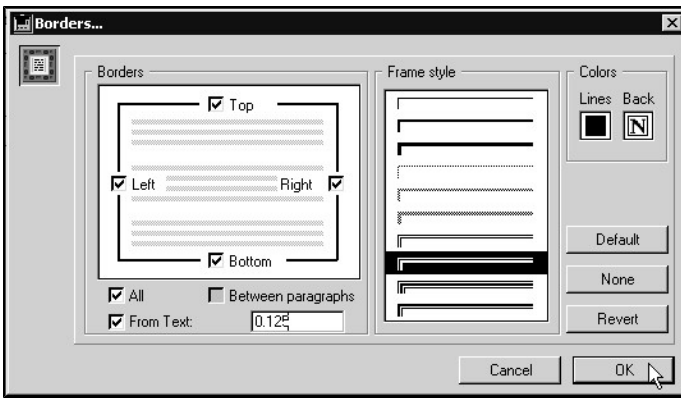
-OR-
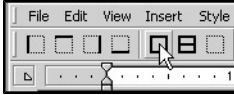
- From the **Format** drop-down menu, choose **Borders**.

- Choose the location where you would like the border or frame to be placed around the selected text.

- Select the type and color of border or frame you would like from the Frame Style area of the Borders window.

- Click **OK** to apply the border or frame style.

Style Sheets

DVMAX lets you create, modify, import and apply style sheets to your document. You can apply existing style sheets using either the **Style** toolbar or the **Style Sheets** option from the **Format** menu

The Word Processing facility lets you create two types of style sheets: style sheets that apply only to characters and style sheets that apply to paragraphs. A character style sheet specifies a combination of attributes that can be applied to text. A paragraph style sheet lets you to set attributes for a paragraph, which includes the character formats, border settings, tab settings and paragraph settings.
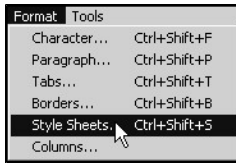
To apply a style to a paragraph or character:

- Select the character(s) or paragraph(s) to which you would like to apply a style.

- Select a style from the style sheet list on the **Style** toolbar. If you want to add or edit styles, you will need to access style sheets from the **Format** menu.

-OR-
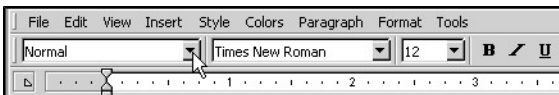
- From the **Format** menu, choose **Style Sheets**.

- From the **Style Sheet** menu, choose a style to apply to the current selection. The **Preview** area provides an example of the selected style.


- Use the **New**, **Edit** or **Import** functions to create, modify or add style sheets.

- Select the **Description** tab on the Style Sheets window to see a summary of the formatting that is applied to the selected style sheet.

- Click **Apply** to apply the style to the paragraph or characters you have selected.

Creating Columns in Word Processing

To add columns to a document:

- Select **Columns** from the **Format** menu. A Columns window opens.

- From the Columns window allows, set the width, spacing and number of columns in the document.

- Click **OK** to apply the column formatting to the selected paragraphs.
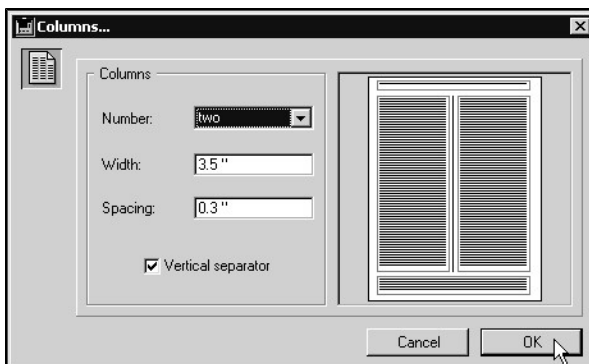
Copy Ruler

Using the **Copy Ruler** command from the **Paragraph** drop-down menu lets you copy all ruler settings from the currently selected paragraph (including tab type and location, first line indent, and margin settings) and apply them to any other paragraph(s) you select.
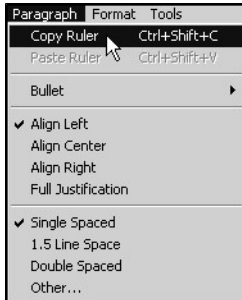
Inserting References

Most documents you will create using DVMAX's word processing function will be templates, meaning they will not be written for use for just one client or patient but can be used by any client or patient in the database. To create templates, you will use DVMAX's **WPPalette**.

The WP Palette

The **WPPalette**, accessed by clicking **Show Palette** from a Word Processing document, does not enter client- or patient-specific information directly, but instead enters a reference to the appropriate information. This dynamic reference will automatically pull in the appropriate information from the current record and display it in your document, customizing the document for each reader while allowing you to leave the body of the letter the same. For example, when you open a reminder document in a client record, it will automatically pull in the name of the current client and any other related information for which a reference exists on the template.

The references you can insert will vary depending on the type of record you are in when creating the document. While there is some overlap, **Clients**, **Patients** and **Referral Source** records each have their own set of references.

The WP Palette in a Client Record

The **WPPalette** in the context of a client record lets you insert information from a client record into your document, including client, patient and referral source data. See *Clients* in this user guide for details on the **WP** references available for documents created from a client record.

To insert a reference from the **WP Palette** in a client record:

- Click **Show Palette** to open the WP Fields Palette.
- Click where you want to insert the reference.
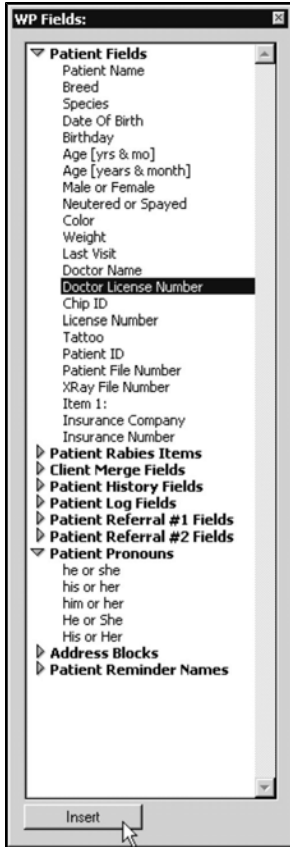- From the **WPPalette**, select an option and click **Insert**.
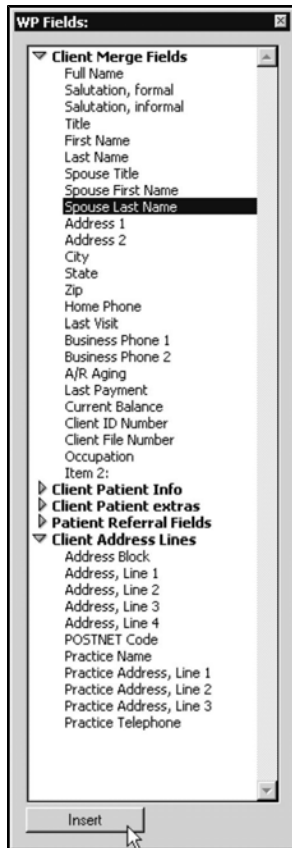
ⓘ Holding down the <Shift> key on your keyboard while inserting an item from the Word Processing Palette will capitalize the text you are inserting.

The WP Palette in a Patient Record

In a Patient record the **WPPalette**, accessed by clicking **Show Palette** from a Word Processing document, lets you insert information from a patient record into your document, including client, patient, referral source and patient history data. See *Patients* in this user guide for details on the **WP** references available for documents created from a patient record.

To insert a reference from the **WPPalette** in a patient record:

- Click **Show Palette** to open the WP Fields Palette.

- Click where you want to insert the reference.

- From the **WPPalette**, select an option and click **Insert**.

ℹ️ Holding down the <Shift> key on your keyboard while inserting an item from the Word Processing Palette will capitalize the text you are inserting.

Inserting Lab Results in a WP Document

To insert lab results in a Patient WP document, select **Insert Lab Entries** from the WP Palette under the **Word Processing** tab of a Patient record.
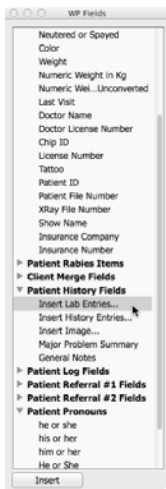
From the **Insert Lab Results** dialog, select **All Lab Results** or specify a date range of lab results for inclusion in the document. Results can be inserted in chronological or reverse chronological order.
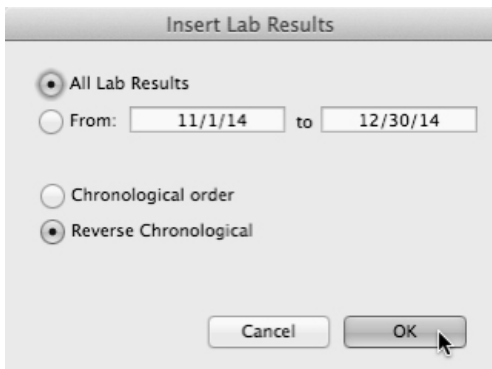

The formatting of the results can be fine-tuned using several advanced settings. Please contact DVMAX Technical Support if you would like assistance in adjusting results display, including column widths and margins.

The WP Menu in a Referral Source

The **WP Palette** in the context of a referral source record lets you insert information from a referral source record into your document. The WP Palette is accessed by clicking **Show Palette** from a Word Processing document. See *Referral Source* in this user guide for details on the **WP** references available for documents created from a referral source record.

To insert a reference from the **WP** menu in a referral source record:

- Click **Show Palette** to open the WP Fields Palette.

- Click where you want to insert the reference.

- From the **WPPalette**, select an option and click **Insert**.
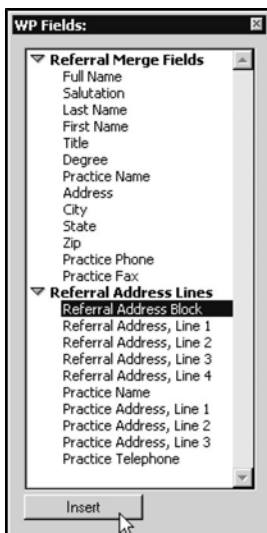
ℹ️ Holding down the <Shift> key on your keyboard while inserting an item from the Word Processing Palette will capitalize the text you are inserting.

Date and Time References in a Word Processing Document

To insert the current date, the current time or both:

- Click where you want to insert the date and time.

- From the Insert menu, select **Date and Time**.
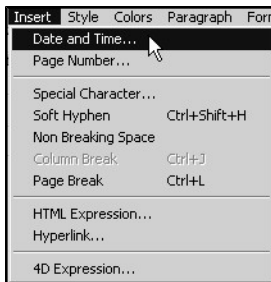
- From the Insert Date window, select the date format from the left list box, or choose **No Date** if you do not want to insert the date. The date will appear in the preview area according to the format you chose.

- Select the time format from the right list area, or choose **No Time** if you do not want to insert the time. The time will appear in the preview area according to the format you chose.

- Select **Automatic Update** to allow the date and time values in the document to be updated to the current date and time whenever the document is opened. If you do not select **Automatic Update**, the time will be fixed on the date and time the reference was first inserted.
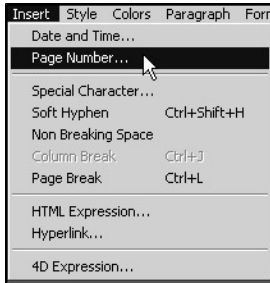
- Click **OK**.
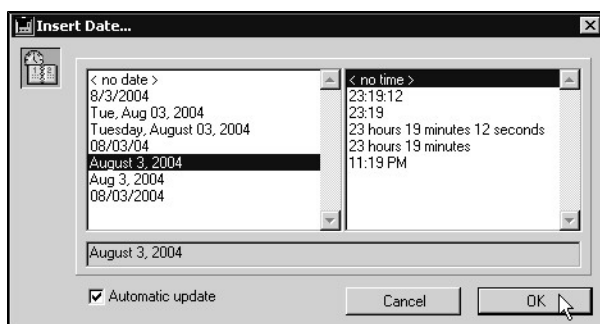
Inserting Page Numbers

You can place references to page numbers in headers, footers or the body of a document. If you insert the page number in the header or footer of a document (you must be working in Page mode), the page number is automatically updated for each page of the document. This allows you to number your pages.

If you insert the page number in the body of the document, it displays the current page number and will be updated if that page is modified, however this will not be repeated for each page. This allows you to reference page numbers of your document.

To insert page numbers in your document:

- Click where you want to insert the page number.

- From the **Insert** drop-down menu, choose **Page Number**.

- From the **Insert Page Number** window, select the pagination style you want to insert.
- Click **OK**.
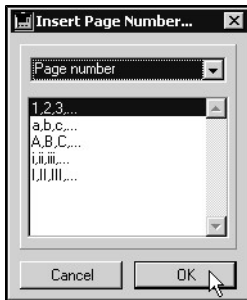
The Tools Menu

The **Tools** menu lets you select utility features such as spellchecking, statistics and document information and the language selection. Using the Tools menu also allows you to display either values or references and to either force an update of the references or to freeze them. You can also activate or deactivate the **Draft** mode.
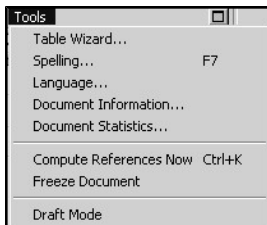
Freeze a Document

Selecting **Freeze Document** from the **Tools** menu freezes the references to data records in the document so that they are no longer dynamic. In other words, all references are replaced by actual data, such as replacing a [Client Name] field with the actual client name, just as if the information was typed in the document. This action cannot be canceled. You can then save the document.

⚠ Saving a document as a Case Document will accomplish the same task as Freeze Document. Select **Save As**, then choose **Case Document** from the **Document Class** menu on the Save WP Document window. See *Document Class* for more information.

Table Wizard

The table wizard allows you to define the settings when creating a table. You can:

- Select predefined table templates.
- Define the number of rows and columns.
- Set an automatic text format.
- Set different automatic values and styles for each column.
- Set different automatic values, colors and styles for specific rows.
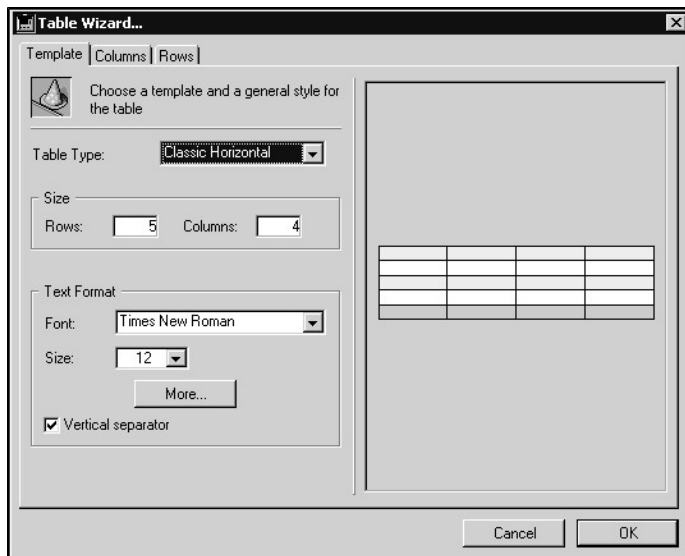
Spell Checking in Word Processing

To check the spelling in your document, select **Spelling** from the **Tools** menu. The checking of the document will begin from the current cursor position. If the spellchecker encounters a mistake, a Spelling dialog box is displayed.