


# How do I...

## Create a new RoboVet document (FP19)

**RoboVet Version:** Feature Pack 19 but this document is appropriate for any versions of RoboVet 5.

**Security Permissions:** To set up a new document requires the security permission **RoboVet Document – Set Up**.

 RoboVet Document - Set Up (All Barred Except:)

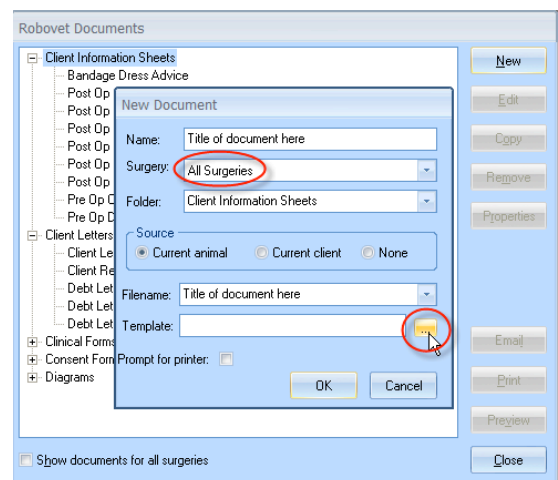
This guide is for RoboVet users who have created and edited RoboVet documents in the past but need something to jog their memory. For full details on how to add and edit documents please see the **Help** file entitled **Introduction to RoboVet documents**.

### Creating a New Word Document

1. Log into RoboVet as a user with access to creating documents.
2. Select an animal in the **Workwith** box.
3. Click the **System** button and select **RoboVet Documents**.

4. Highlight one of the existing folders and click **New**. The **New Document** dialog box appears.

- a) Enter the name of your document. The name you enter will automatically be entered as the **Filename**.
- b) Select **All Surgeries** (not the default) if you want to use the document at all branches.
- c) Change the **Folder** if required or type in a new folder name.
- d) Choose the **Source** for your merge fields.
- e) Click on the browse button to the right of the **Template** field if you want to base your document on one you have on your network.
- f) Click on **OK**.



5. A **Microsoft Word** document will appear. Create your document using the merge fields and your imagination. More information on using the merge fields is in the **Help** file entitled **Introduction to RoboVet documents**.
6. Save the changes and exit **Word**. Confirm in RoboVet that you have finished editing the document. If you have branches the document will be sent to the branches at the time of the next synchronisation.
7. Close the RoboVet Document Detail dialogue box and then test your document.

## Editing a RoboVet Document

1. Log into RoboVet as a user with access to creating documents.
2. Select an animal in the **Workwith**.
3. Click the **System Button** and select **RoboVet Documents**.
4. Choose the document to be changed and click on the **Edit** button to the right of the document name.
5. Edit your document. Save the changes and close Word. Confirm in RoboVet that you have finished editing the document.
6. Test your document.