

**eBase v8 Manual letters and templates.
(including smart tags)**



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1. Basic principles

Templates can be created in the eBase to generate letters and statements. In those templates, merge fields can be added to merge data from the system into a letter. The functions in the editor are designed to easily combine letter text and formatting with data from the system.

A template can be created by an authorized system user. System privileges can be set up through user management. When a user is authorized to create templates, this is visible in the admin menu.

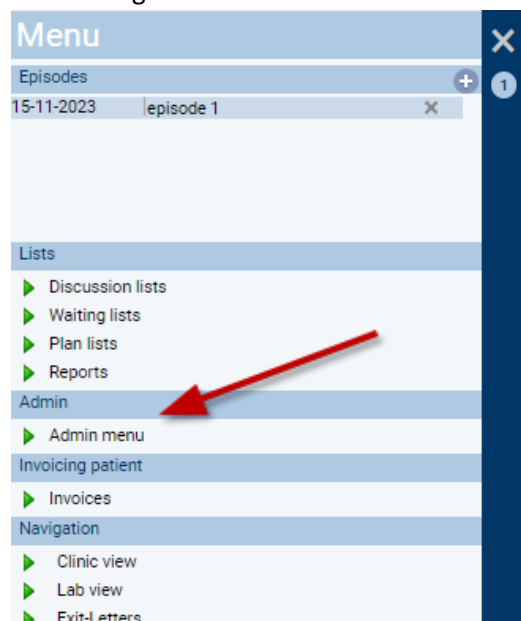


Figure 1: admin menu access.

Open the folder 'letters - Templates'. By choosing the option 'new' a new template can be created. Above the template name is a search field, by entering a name here you can search the available templates. Templates can be imported with the option 'import'. With the button 'replace' a (piece of) text can be replaced at once in all templates.

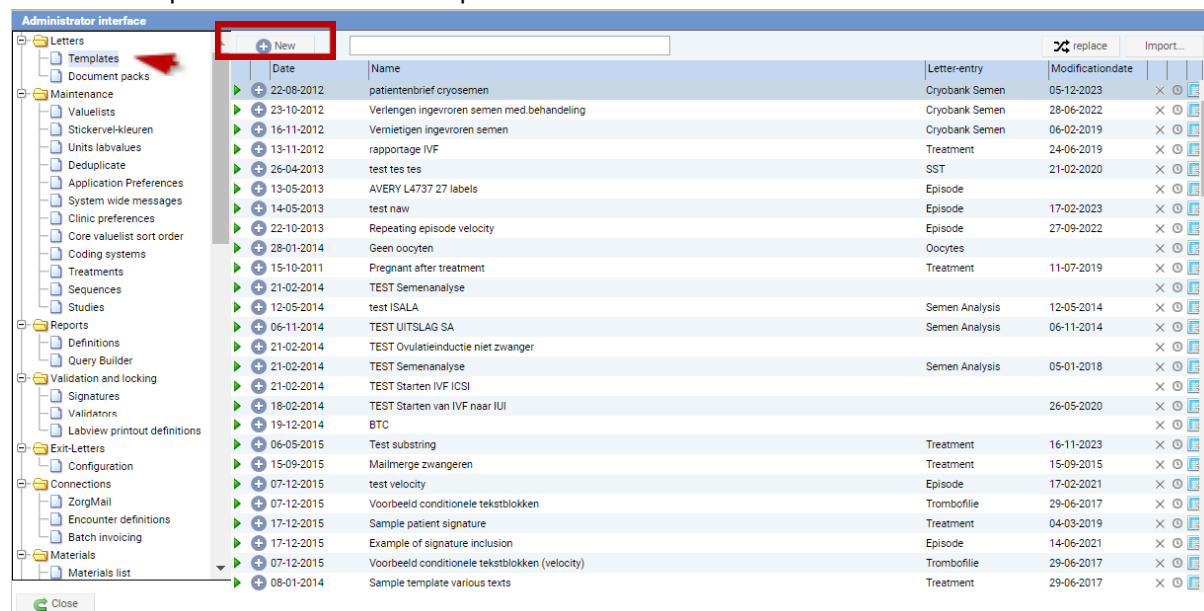


Figure 2: Overview of letters and templates.

The screen below appears.

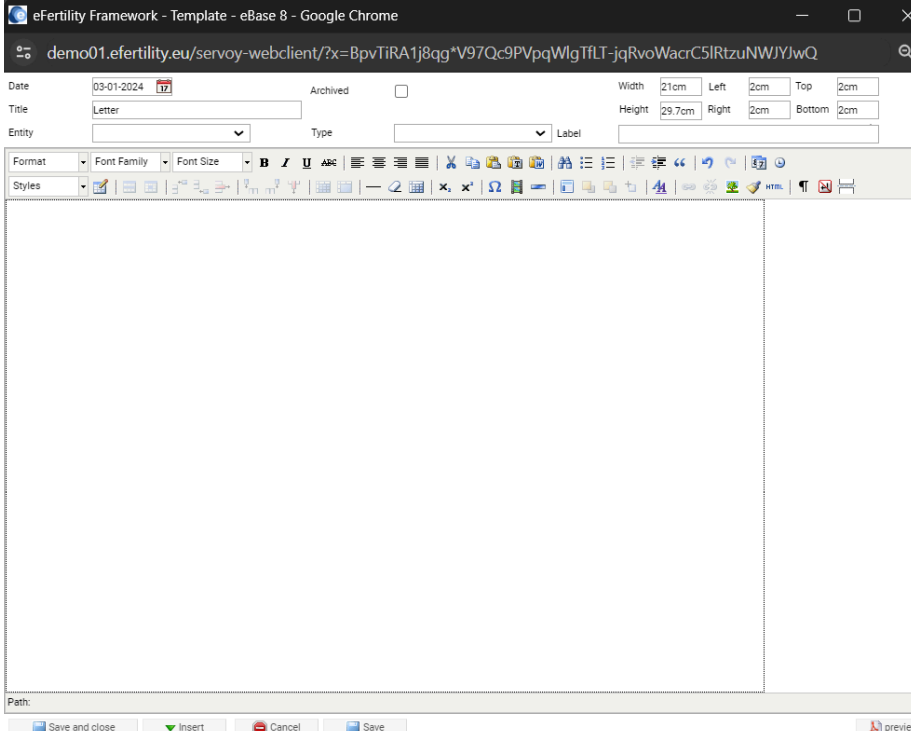


Figure 3: Create letter template screen.

This screen is explained in more detail in sections. The top column contains information about the letter.



Figure 4: Top column letter template.

The date of the letter is automatically displayed. However, it can be adjusted manually.

- Give the template an unambiguous title.
- Under entity, indicate where in the eBase this letter can be created.
- Under type, indicate whether it is a correspondence letter (yet to be modified) or a validation report (direct to PDF).
- Under label, specify in which folder in the file the letter should be stored.
- This is a selection from the "correspondence labels" value list. This must/can be created by yourself via the admin menu.
- Set the desired edges of the letter. The dotted line indicates the global print margins.

The second column is the toolbar with editor buttons.



Figure 5: Second column letter template.

The last column are the saving and closing options.

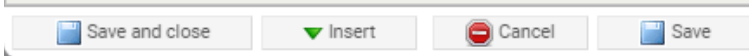


Figure 6: bottom column letter template.

At the 'insert' option, fields can be added from the database. By clicking on 'preview' a print preview becomes visible.

2. Use

2.1 Insert fields via the insert button

Using the insert button, field values can be inserted into a template. Those field values or merge fields are characterized by two {{ and two }}. When populating values from the system, it must be possible to find a logical route to the data. For example, if a puncture field is put in an episode letter, the system cannot know which cycle the data should be put in the letter. It then searches for the most logical route. This is usually the most recent item that can be found (e.g. most recent blood result, most recent cycle, etc.).

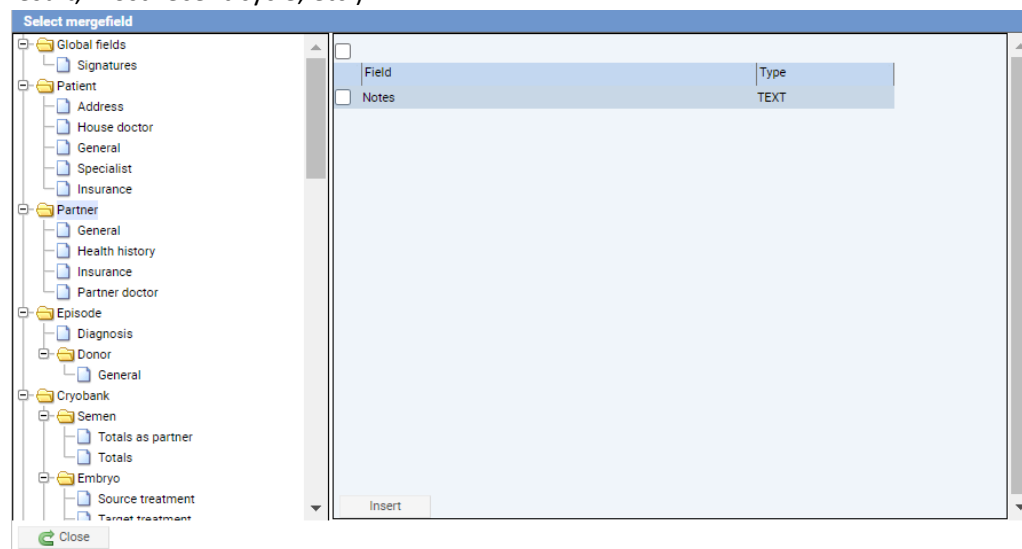


Figure 7: merge fields overview.

Inserted mark field

Note: When using Internet Explorer, a field is always inserted at the top of the document. It will then have to be moved to the correct place in the text. In other browsers (e.g. Mozilla Firefox, Google Chrome), the field is inserted at the location of the cursor.

2.2 Inserting fields via "admin mode"

When creating a template, it can be difficult to find the right insertion field in the long list of fields. Hence, there is another way to search. Log in through the "admin mode. This entry is only available to eBase users logged into the system as 'local administrator'. 'Admin mode' is activated by holding down the Ctrl key while clicking on the 'login' button.

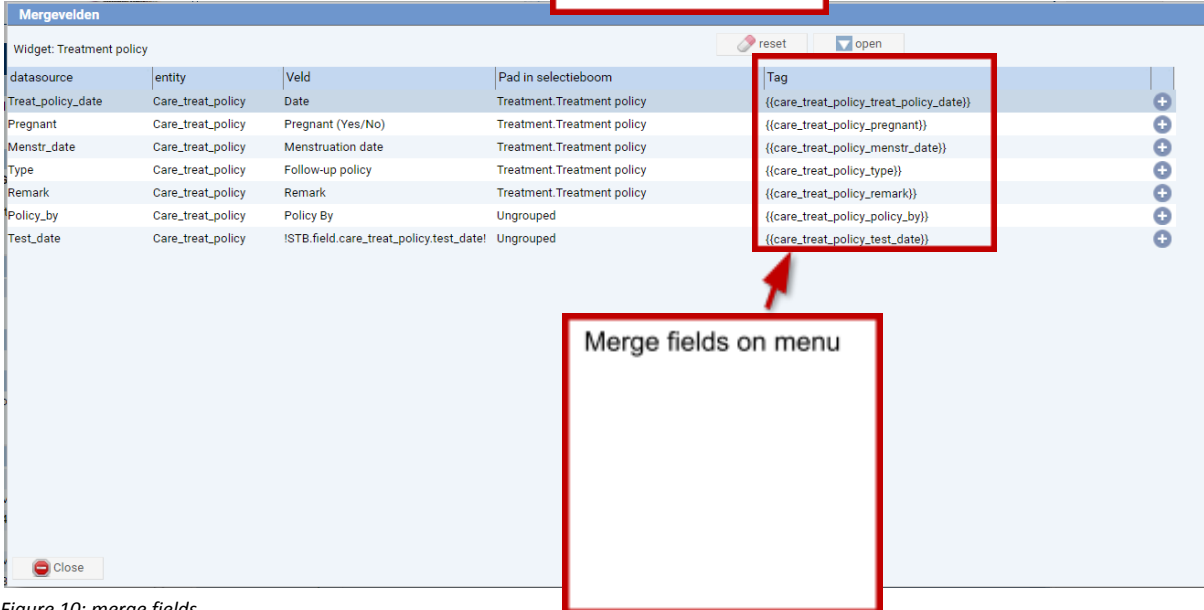


Figure 8: login screen.

The display of the input screens is now slightly different. Additional icons such as an envelope are displayed at the bottom right. By clicking on these, all fields of that particular screen are displayed with the corresponding merge fields. The merge field can then be copied and used in a template. This method only does not work on composite screens such as the anamnesis. See below for an example of the 'follow-up policy' screen.



Figure 9: follow-up policy.



datasource	entity	Veld	Pad in selectieboom	Tag
Treat_policy_date	Care_treat_policy	Date	Treatment.Treatment policy	{{care_treat_policy_treat_policy_date}}
Pregnant	Care_treat_policy	Pregnant (Yes/No)	Treatment.Treatment policy	{{care_treat_policy_pregnant}}
Menstr_date	Care_treat_policy	Menstruation date	Treatment.Treatment policy	{{care_treat_policy_menstr_date}}
Type	Care_treat_policy	Follow-up policy	Treatment.Treatment policy	{{care_treat_policy_type}}
Remark	Care_treat_policy	Remark	Treatment.Treatment policy	{{care_treat_policy_remark}}
Policy_by	Care_treat_policy	Policy By	Ungrouped	{{care_treat_policy_policy_by}}
Test_date	Care_treat_policy	ISTB:field.care_treat_policy.test_date!	Ungrouped	{{care_treat_policy_test_date}}

Figure 10: merge fields.

2.3 Smart tags

An additional feature in the eBase are the so-called "Smart Tags". These allow you to manipulate the text in a template. Besides the name of the source field, a 'Smart Tag' also contains information about the way the field should be displayed. Through a special notation of tags, this way the text can be made dependent on the influence of a field. The different options are separated by a "|" character. Within options, the condition and associated text are separated by a ":" character. Therefore, the general notation of a "Smart Tag" is as follows:

{{name_of_field[option1:text by option1|option2:text by option 2]}}

Following options can be set:

Condition	Explanation
0 (or other number)	Text when it says '0'.
Null	Text when nothing is entered (blank).
Notnull	Text when is something entered.
>, >=, <, <= value	Text when a number is greater than, greater than or equal, less than or less than or equal to the value (>10, <=20).
literal text	Text if a specific text or value is in a field.
Special options	Description
<text>\$\$<text>	Replace the \$\$ with the value from the field before it. Used to put the values in a text.
{{!merge_field}}	Abbreviated representation of the option to not return ??? for an empty field. returned.

Table 1: Overview of smart tags.

The above looks more complex than it is hence some examples to illustrate the usage:

Smart Tag	Translation
{{!care_bloodtest_fsh}}	<i>This notation (with exclamation point) ensures that an unfilled field does not return '???'. It says 'return an empty value when nothing is entered'.</i>
{{care_bloodtest_cat[negative:no abnormality in the CAT value was measured positive:a positive result on a CAT test dubious:the result of the CAT is questionable]}}	<i>In this example, the literal texts of a blood result are translated into well-written phrases.</i>
{{care_middle_name[notnull: \$\$ null:]}}	<i>Put an extra space when the 'insertion' field is filled. Note the extra space after the colon.</i>
{{care_person_smokes_sig_a_day[0:patient does not smoke 1:patient smokes \$\$ cigarette per day >1:patient smokes \$\$ cigarettes per day null:it is unknown if patient smokes]}}	<i>When exactly 0 is entered for a patient, the text 'patient does not smoke' appears. When exactly 1 is entered, the text 'patient smokes 1 cigarette per day' will appear. If more than 1, the text 'patient smokes x cigarettes per day' will appear. Finally, the value to be displayed when the field is not filled in is described. In this example, if nothing has been entered, 'it is unknown whether patient smokes' will appear.</i>
{{care_intake_referral_reason [sec. subfert. female:secondary sec. subfert. pair: secondary prim. subfert. female:primary primary. subfert. pair: primary]}}	<i>In a field with multiple options, one option can be used per condition. In this example, the text 'secondary' or 'primary' is placed when entered for either the woman or the couple.</i>

Table 2: Examples of smart tags.

Almost all flowing sentences can be created this way. However, the conditions apply to a single field. When multiple fields are to be included in a comparison, a calculation is required for this. The limitation of 'Smart Tags' is that one field always serves as the condition.

Note: Smart Tags are an additional feature of the templates editor. Support is not included in the regular support. If a user wishes to use this feature, a course can be followed at eFertility. If the course has been followed, eFertility will provide support.

2.4 Fonts and formatting

When fields are inserted or text is typed, it is important to name the font and size. If not explicitly named, the default font will be displayed. Therefore, for formatting, it is essential that all text is selected at once (with the mouse or with a hotkey such as Ctrl-A). After this, the font and text size must be selected from the toolbar. This is different than in a word processor such as MS Word where the font can be set first after which all text adapts to it.

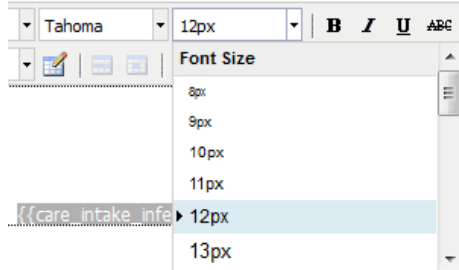



Figure 11: Defining text size.

2.5 Aligning text in columns.

One of the most difficult parts of formatting a template is the alignment and positioning of the text. This has two main causes. First, the width of merge fields is usually not the same as the final text that will appear in a merged letter. This makes it virtually impossible to set the alignment using spaces so that it looks right for every letter.

The second cause is in the lack of a "Tab" character on the Web. This can make it difficult to have a fixed defined space after a text before a new column begins. Hence, the use of a table is recommended. This way it is possible to align text next to each other or at a different position of the margin (as in an address line).

A table can be inserted from the toolbar using the icon . After this, the basic table menu appears:

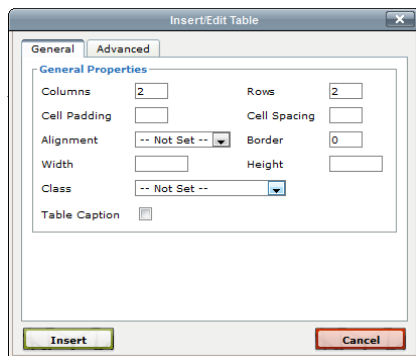


Figure 12: insert table.

By default, tables have an border of '0'. No lines and borders are then visible.

2.5.1 Example address align 10cm from left margin.

The following shows how to insert a table with 2 columns and 1 line width of 100%.

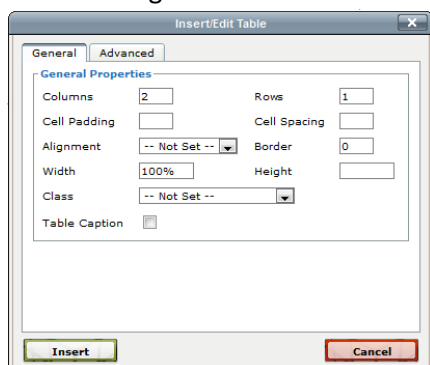


Figure 13: Address alignment.

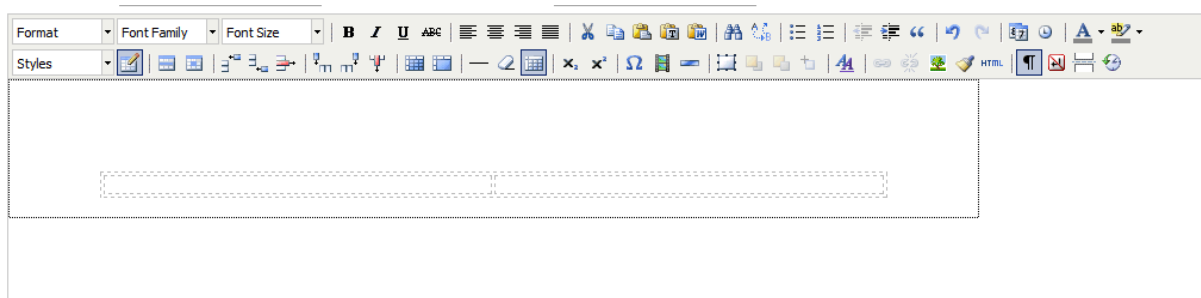


Figure 14: Align outcome address.

Place the cursor in the first cell and right-click. The context menu will appear. Choose 'Cell'-'Table Cell properties'.

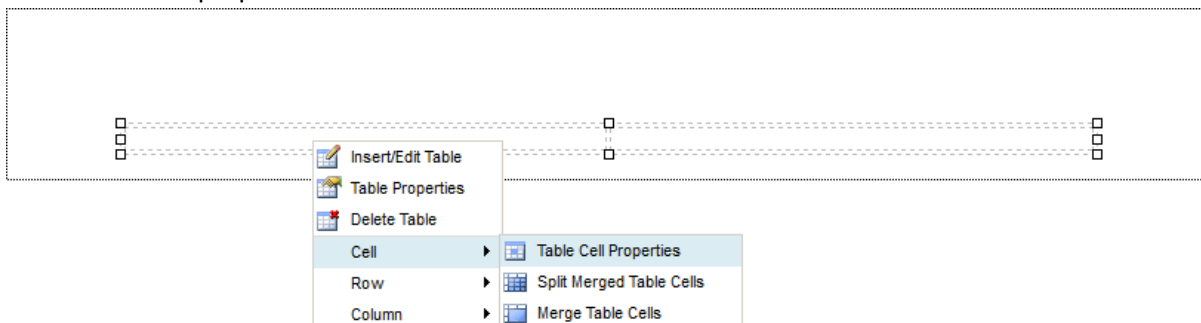


Figure 15: Table properties.

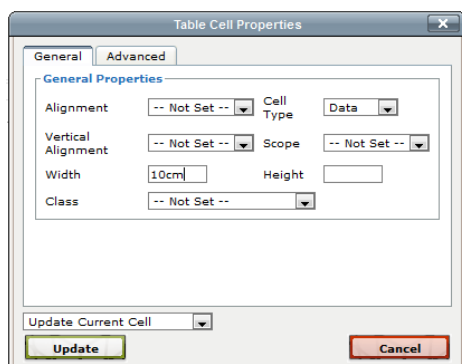


Figure 16: Enter table properties.

In the 'Width' field, type the text '10cm'. This defines that the first column will be 10cm wide. The second column connects directly to this. Click 'Update' to confirm this. A text (or merge field) can now be put in the second column.

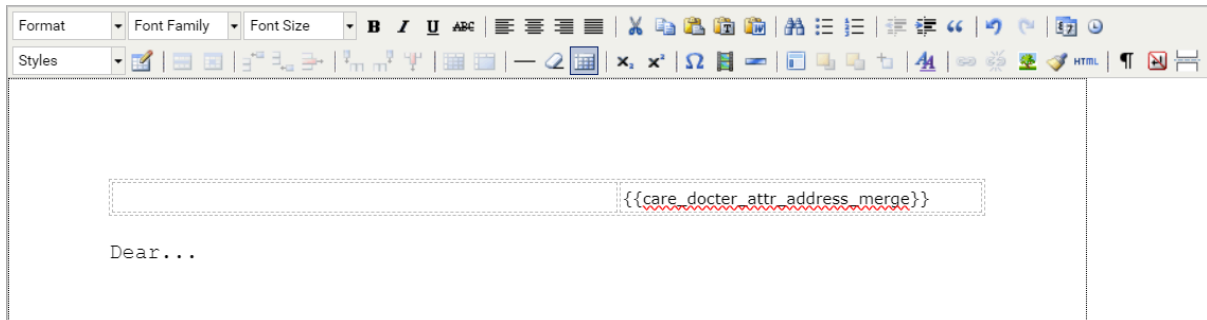


Figure 17: insert merge field.

2.5.2 Important settings for tables

To format a table to your liking, a few settings are important.

Situation 1: the columns in a table have a fixed width. The text in them should not determine this width. The text in table lines should also not be outside the margins of a letter.

Required setting:

- Move the cursor into the table and right-click. The context menu appears.
- Choose "table properties."

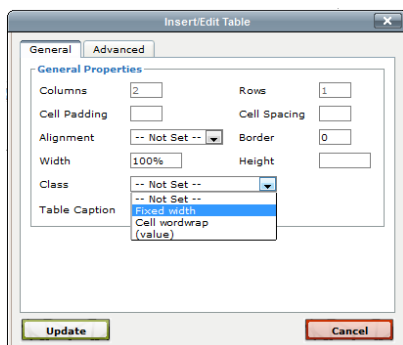


Figure 18: Table properties.

- In the 'Class' option there is an option 'Fixed width'. This ensures that the cells (columns) in a table have a fixed width. This width does not change if there is more or less text. Excess text is not displayed.
- [OPTIONAL] For each cell, a separate setting can also be made that determines whether excess text is hidden or should appear on the next line (text wrapping). This is the 'Cell wordwrap' setting in the 'Table Cell Properties'.

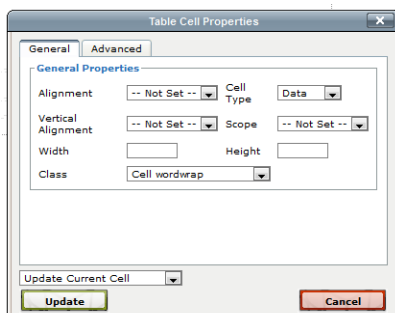


Figure 19: enter mer field.

The contents of this cell have a "cell wordwrap" setting. The text is placed on multiple lines if necessary	
The contents of this cell are not. At the end of the cell it just stops.	

Situation 2: In a multi-column table, there is a variable number of lines per column. By default, the alignment is in the middle. In this situation, we want to change the alignment to top.

The contents of this cell span multiple lines. The contents of other texts are on the same line in the middle. Sometimes this is good, sometimes the alignment should be at the top.	Short text

Required setting:

- Give a right click in the table and under 'Row' and then choose 'Table Row Properties'.
- Choose "vertical alignment" and select "Top".

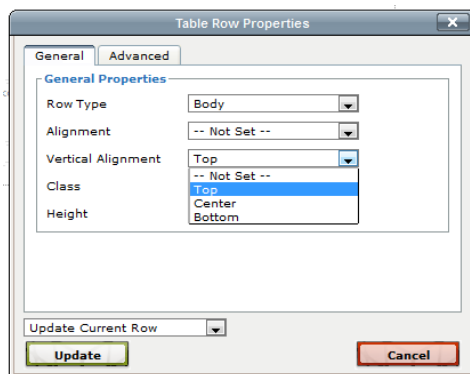



Figure 20 : table properties.

The contents of this cell span multiple lines. The contents of other texts are on the same line in the middle. Sometimes this is good, sometimes the alignment should be at the top.	Short text

2.5.3 Page transition force

In principle, the length of a Web page is infinite. However, when printed on paper, it is desirable to be able to break up a text and display it on the next page. This happens automatically for long texts but can also be set manually. To do this, use the icon . On the screen this looks like this:

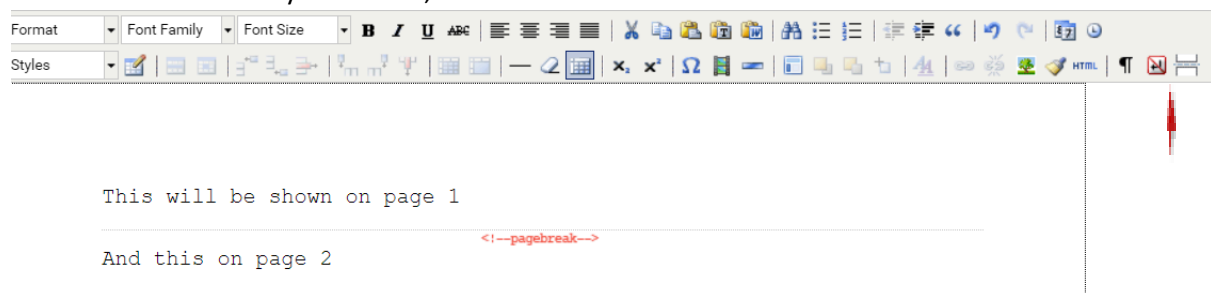






Figure 21: page transition.

2.6 Detecting errors/sloppy formatting.

When a letter is sloppily formatted with lots of spaces, enters, etc., this can easily be detected by choosing the following icon . This icon indicates in gray where hidden spaces and the like are (see print screen below).

This is a letter  with hidden spaces in it. For example, to put a date on the right of the letter:
 London, August 8 2023
 This can also be done using a table

	London, August 8 2023
--	-----------------------

 Or by aligning right with 

London, August 8 2023

Figure 22: formatting letter.

2.7 Saving and testing.

Finally, a brief tip regarding testing templates. At the bottom right, the "Preview" button can be selected. This button briefly displays a PDF view of the template. In this preview, no data are replaced, but you can immediately see whether the set fonts, margins, tables and the like look good on a print-out.

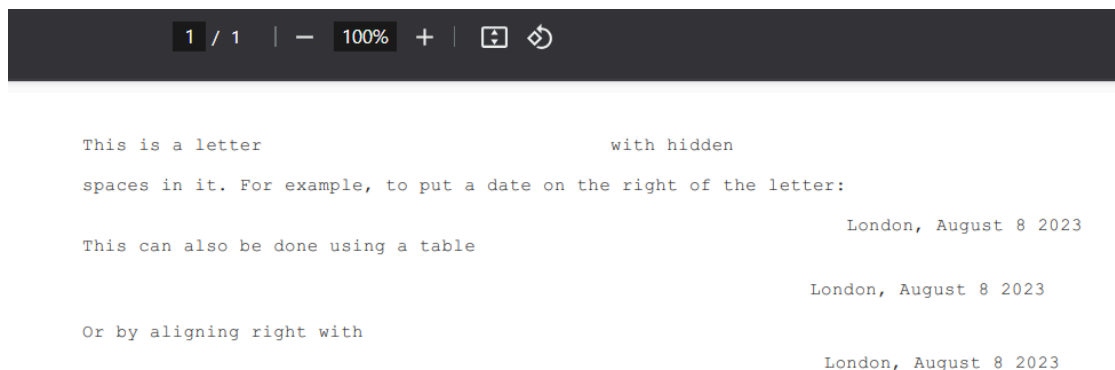
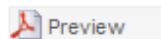


Figure 23: save and test letter.

2.8 Advanced formatting and content.

The features described in this manual are intended for the average letter template administrator. For template design, it is usually wise to take a separate training course. Still, there are situations where both the merge fields and smart tags are not sufficient to create the desired letter content. Additional advanced functions are built into the letter module. These allow, for example, calculations to be done, lists of data to be displayed, multiple fields to interact, etc. These functions are called velocity directives. Velocity directives are scripts that allow data to be programmed into the template. The complete use of velocity directives is beyond the scope of this manual. However, some examples and templates of common pieces of code are available. This code can be put into the letter text from a template (see print screen below).

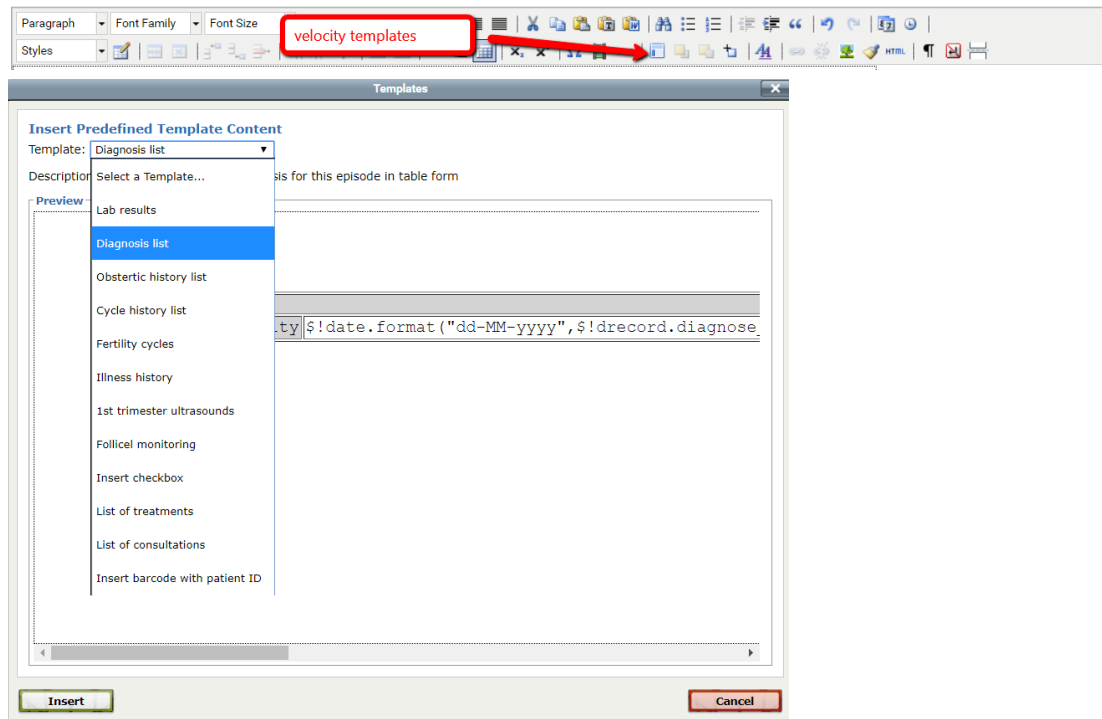


Figure 24: insert template.

The templates are used in most cases to put a list of data into a letter. Embedding a new velocity code yourself requires more background/knowledge of the internal workings of the eBase. If interested, special training can be taken for this purpose.

2.9 Note regarding ZorgMail

Many letters today go to the doctor not on paper but via ZorgMail. A ZorgMail letter cannot contain formatting. It is therefore important to take this into account in the design of the template. The rule of thumb here is: if a letter is to be sent via ZorgMail it is wise to minimize the layout, so no tables, no bold characters, no colors, etc.