

EPIQ & Affiniti

Report Template Editor

QuickGuide

About the Report Template Editor

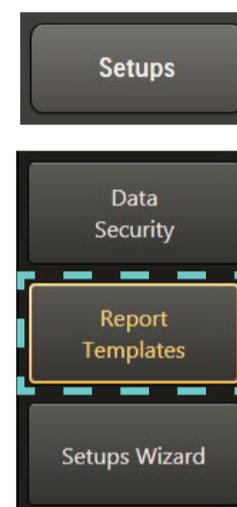
Available on and off-cart (PC only) for EPIQ Evolution 2.0 and Affiniti AOS 1.5 systems and higher. The Report Template Editor allows users to:

- add logos
- edit text colors and fonts
- customize the layout of exported and printed reports

Customizing a Template

Launch the Report Template Editor

- 1 Press **Setups** on the touch panel.
- 2 Click **Report Templates** on the left-hand side.



Create a New Template

- 3 Select a template from the Template Menu on the left-hand side of the screen.
- 4 Click **Copy Template**.
- 5 Enter a Name and Description for the custom template.
- 6 Press **Next**.

Images for All Applications	Factory Template to include only the Image Section for All Applications combined	Abdominal, AdultEcho, FetalEcho, GYN, General, OB, PediatricEcho, SmallParts, TCD, Vascular	Factory
TCD	Factory Template for TCD	TCD	✓ Factory
Pediatric Echo Imaging Mode	Factory Template for Pediatric Echo (Mode Based Grouping)	PediatricEcho	✓ Factory

Copy Template

Name:*

Copy Template Name...

Description:

Enter Description...

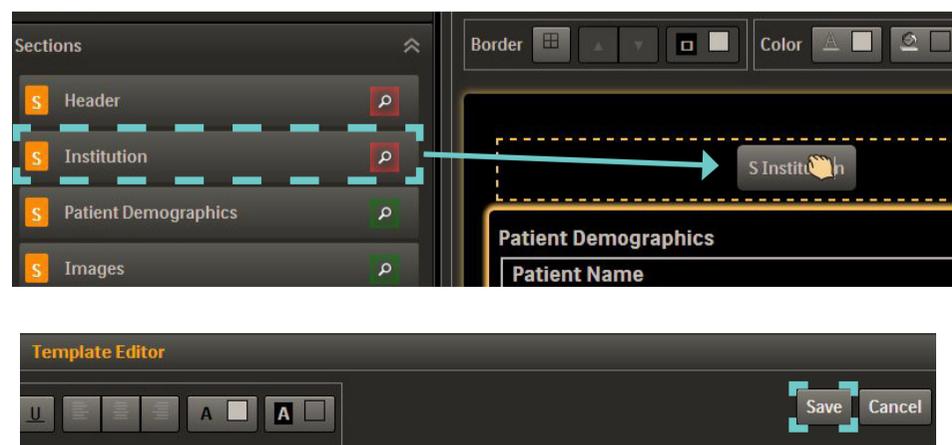
Format the Template

- 7 Click and drag preferred Report Fields and/or Sections onto the report.

Note: See Tips & Tricks section for more details.

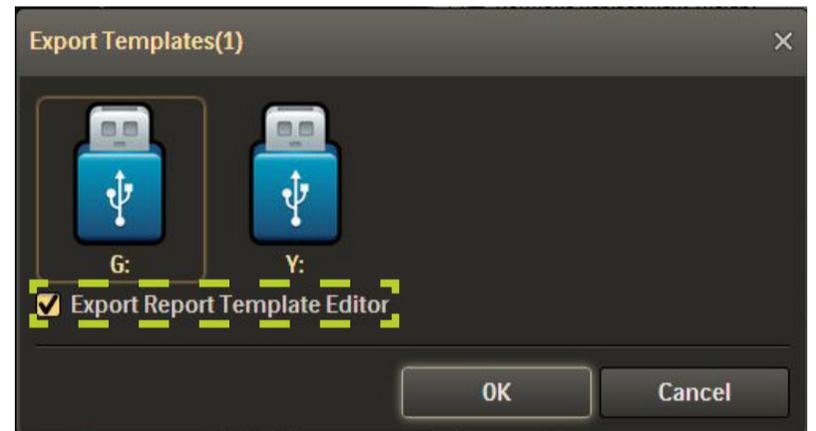
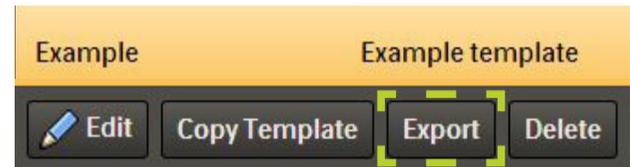
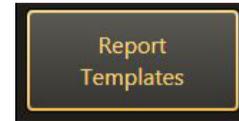
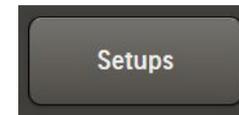
- 8 Press **Save** in the upper right corner.

Once the template is saved, the user is returned to the Template Home screen.



Report Template Editor PC Installation

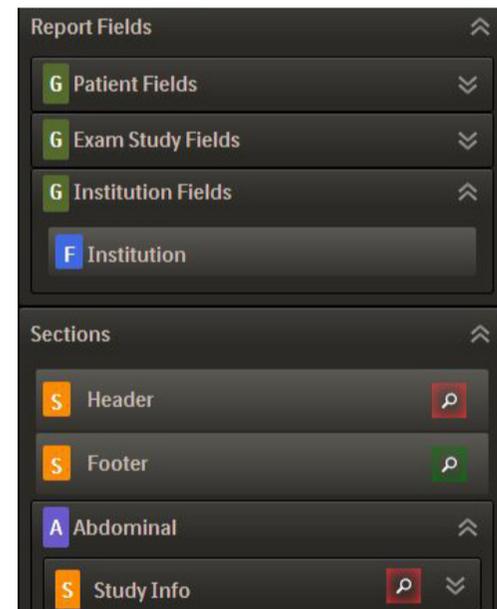
- 1 Connect a USB storage device to a system with EPIQ Evolution 2.0 or Affiniti AOS 1.5 or higher.
- 2 Press **Setups** on the touch screen.
- 3 Click **Report Templates** on the left side of the screen.
- 4 Select any custom template and then press **Export**.
Note: The Export button is not available for factory templates.
- 5 Select a USB device for the template export and then select the Export Report Template Editor checkbox. Press **OK**.
- 6 Connect the USB device to a PC and copy the ReportTemplateEditorTool application to the PC.



Tips and Tricks

Sections, Fields, and Groups

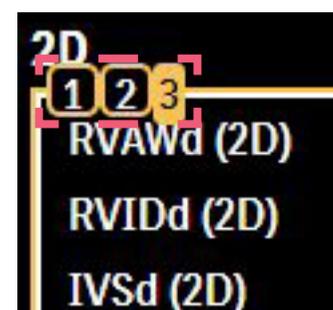
- Sections **S** and Groups **G** consist of individual fields **F** of data.
- Click on the chevron **<>** to expand or collapse Groups and Sections.
- To remove a Section, Group, or Field from the template, first select the item and then click the **X** button in the upper left corner.
- The green magnifying glass icon **🔍** indicates that an item is currently in the template. Items with red magnifying glass icons **🔍** are not in the template.
Tip: Click on a green magnifying glass icon to jump to that section in the report.
- Click and drag Sections with the move handle **☰** to reorder them in the report.



Number of Columns

- 1 Select a measurement section.
- 2 Press the 1, 2, or 3 column button.

Note: Some sections do not have this option.



Formating

Text

Font, size, and color can be adjusted with the tools at the top of the template editor. Customize individual sections or the entire template.

- 1 Click on a section to apply the formating changes.

Select the entire template to apply formating changes to all sections.

- 2 Select the type of text from the dropdown menu.

Note: Some sections do not have Subtitles. If one of these sections is selected, Subtitle will not be an option on the dropdown menu.

- 3 Use the formating tools to make preferred changes.

Tip: For printed reports, 12pt font is recommended. For digital reports, 16pt is recommended.

Images & Logos

Images and logos can only be added from a USB device. The image files must be at the root level and cannot be in folders. Accepted image types are jpg, gif, png, icon, and bmp.

- 1 Hover over the edge of image to get the double arrow cursor.
- 2 Click and drag the image to resize.

Export Template

Templates created on-cart or with the PC tool can be exported and transferred to other systems. Only custom templates can be exported to USB devices. Factory templates cannot be exported.

- 1 Select the preferred template on the Template Home screen.
- 2 Press the **Export** button.
- 3 Select the preferred USB drive and press **Ok**.

Import Template

Custom templates created on-cart or with the PC tool can be imported from a USB device.

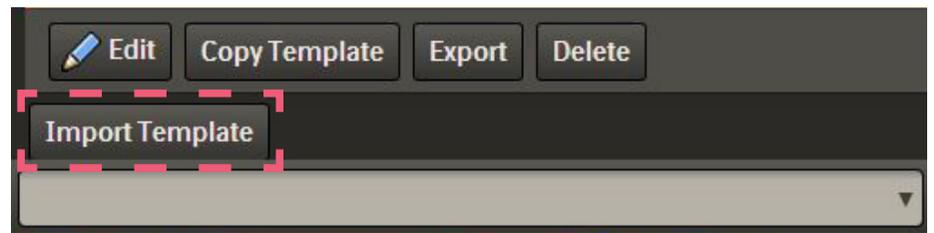
Note: Templates must be in the root level of the USB drive, not in a folder.

- 1 Connect the USB device with the preferred template to the system or PC.

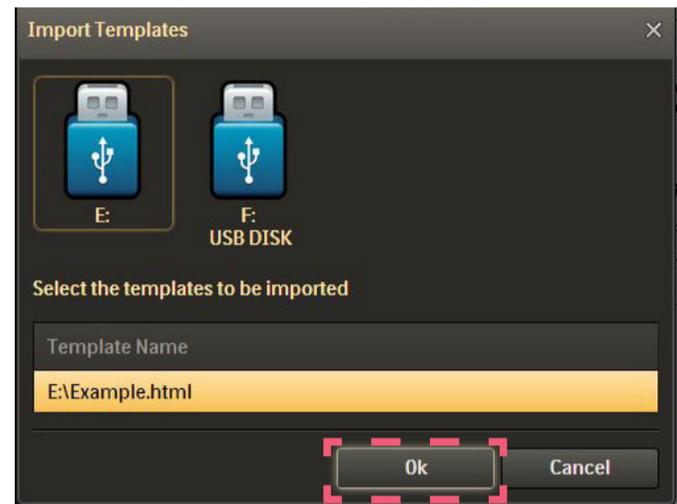
Entire template is selected.



2 Press the **Import Template** button in the bottom left corner of the Template Home screen.



3 Select the preferred USB drive and then select the Template Name from the list. Press **Ok**.

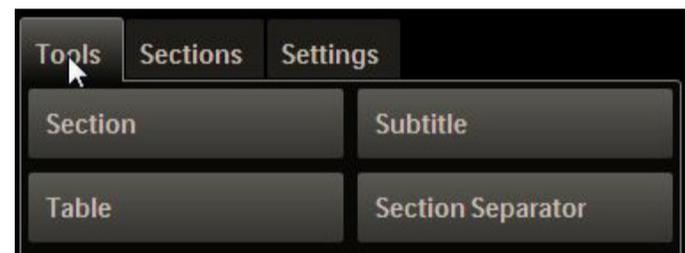


Advanced Features

Sections and Tables

Empty Sections and Tables can be used to structure the layout of fields.

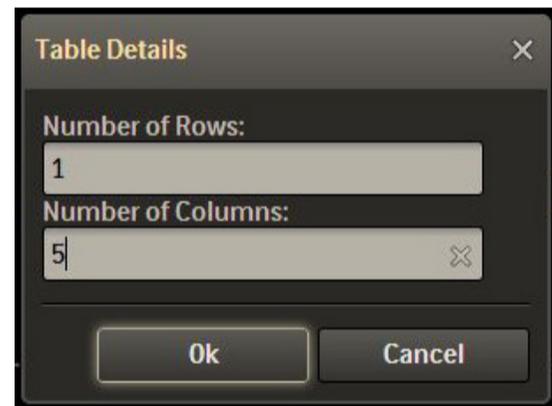
1 Click the Tools tab then click and drag a blank Section onto the template.



2 Click and drag a Table from the Tools tab into the newly created Section.

3 Enter the preferred number of columns and row.

Tip: To create sections with varying numbers of columns, create multiple tables with one row and varying numbers of columns.

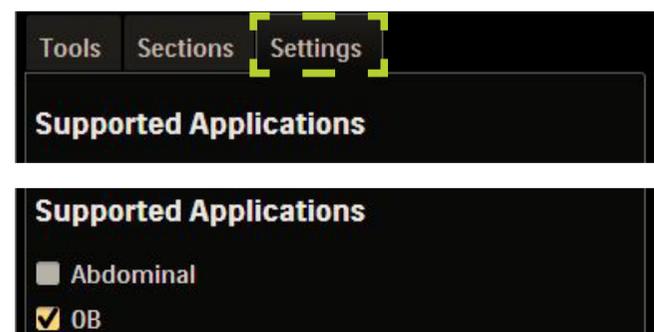


4 Click and drag individual Report Fields into the table from the Section tab.

Adding Additional Applications

Report templates have measurements for one application by default, however, measurements from other applications may also be required. For example, specific GYN or Fetal Echo details may be needed on an OB template.

1 Click the **Settings** tab.



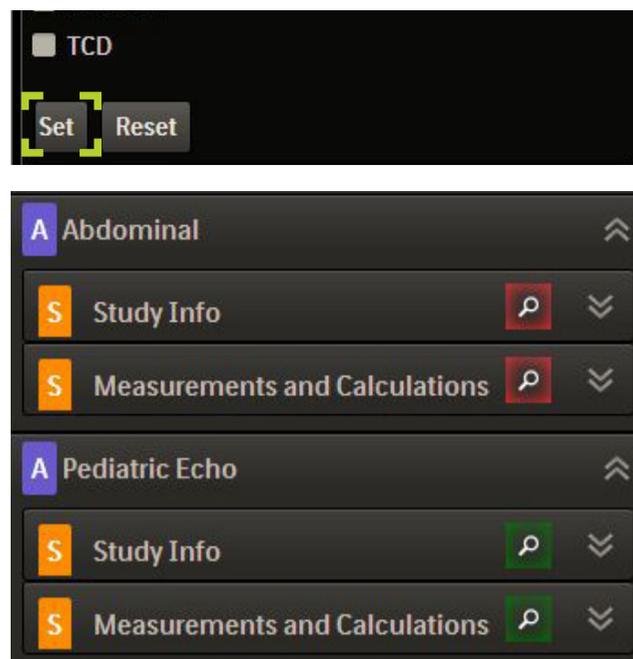
2 Enable the checkbox next to the preferred application(s).

- 3 Press the **Set** button.

The additional application(s) will be added to the Sections tab.

- 4 Click and drag the preferred section(s) or field(s) onto the report template.

Note: Measurements from additional applications are not added to the template automatically.



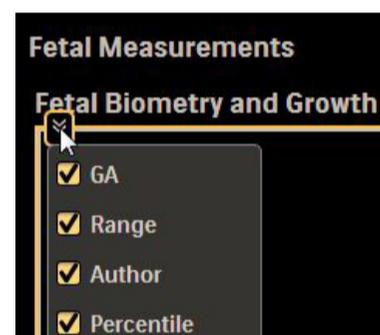
Selecting Column Information

The information columns for some measurements can be customized to include details such as the Range, Author, or Percentile.

- 1 Select the measurement section, then click the chevron button in the upper left corner.

- 2 Enable or disable the checkboxes for the preferred columns.

Note: A maximum of 4 columns can be displayed in vascular applications with laterality.



Measurements

Measurement Order

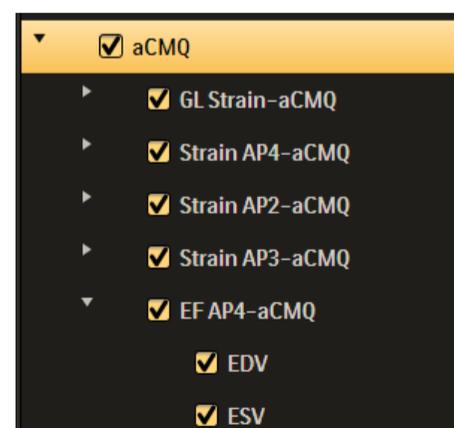
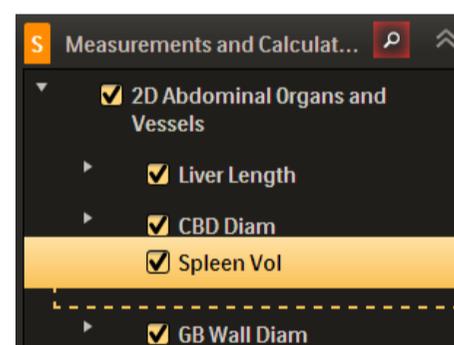
The order in which measurements are listed in a section can be customized.

- 1 In the Section tab, expand the **Measurements and Calculations** Section for the application.
- 2 Click and drag measurements into the preferred order.

Excluding Measurements

Each measurement or calculation has a checkbox next to it. By default, this checkbox is enabled which means that if the measurement is taken during an exam it will appear in the report. Fields for measurements that are not taken during the exam will not appear on the report.

If a measurement box is unchecked, the measurement can still be taken during an exam and will appear in the report in the Other Measurements section. Leaving the checkbox enabled for all measurements is recommended.

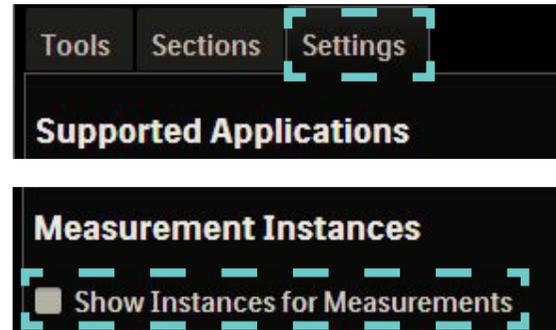


Multiple Instances of a Measurement

When multiple instances of a single measurement are taken during a study, the report will default to the average of the measurements. To show multiple instances of a measurement...

- 1 Click the **Settings** tab.
- 2 Enable the **Show Instances for Measurements** checkbox.

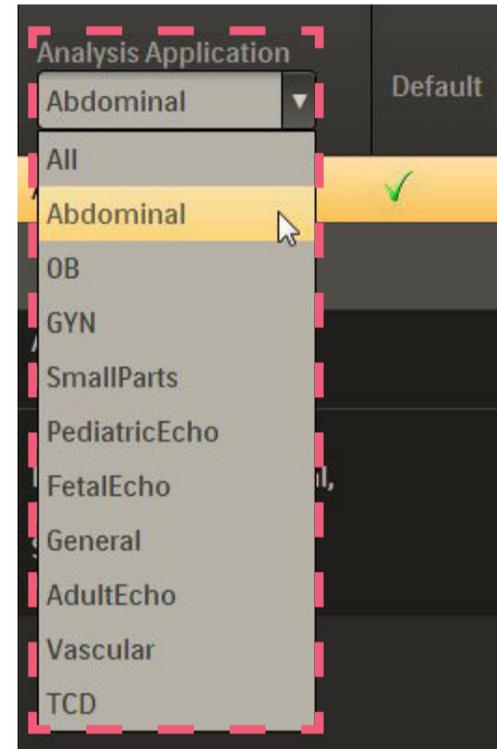
Note: This may override column number customization.



Setting Default Template

Customized reports can be set as the default report for analysis applications.

- 1 Starting from the Template Home screen, select the analysis application from the dropdown menu.



- 2 Select the preferred report and then click the **Set as Default** button.

