Using LibreOffice in Vision

Version 2.0

17 August 2026

Copyright © 2025 OneAdvanced

All Rights Reserved

No part of this document may be photocopied, reproduced, stored in a retrieval system or transmitted in any form or by any means, whether electronic, mechanical, or otherwise, without the prior written permission of **OneAdvanced**

No warranty of accuracy is given concerning the contents of the information contained in this publication. To the extent permitted by law, no liability (including liability to any person by reason of negligence) will be accepted by **OneAdvanced** its subsidiaries, or employees for any direct or indirect loss or damage caused by omissions from or inaccuracies in this document.

OneAdvanced reserves, the right to change without notice the contents of this publication and the software to which it relates.

Product and company names herein may be the trademarks of their respective owners.

Registered name: OneAdvanced Limited. Registered number: 05965280

Website: www.oneadvanced.com

Contents

Introduction to LibreOffice in Vision Products 4

Using LibreOffice in Vision 3 6

Default Word Processor 6

Creating New Vision 3 Templates in LibreOffice 8

Editing LibreOffice Templates 11

Converting Word templates to LibreOffice using the LibreOffice to Word Conversion Tool 15

Supported Templates 15

Preparation before running the Conversion Tool 17

Running the Conversion Tool 17

The Evaluating templates process 19

Viewing the results of the Evaluation ready for Conversion 20

Converting Templates 23

Viewing the Log File 24

After the conversion process has completed 25

Manually Re-creating Microsoft Word Templates in LibreOffice 26

Creating New Vision+ Letter Templates in LibreOffice 31

Practice Reports - Selecting Letter Templates 39

Editing LibreOffice Templates 40

Re-creating Microsoft Word Templates in LibreOffice 44

Local LibreOffice Calc Extracts 49

LibreOffice Correspondence 52

Available Merge Fields – Vision 3 56

Introduction to LibreOffice in Vision Products

This user guide focuses on the use of **LibreOffice** within **Vision 3** and **Vision+** and provides all the information you need to switch from **Microsoft** to **LibreOffice**.

See Using LibreOffice in Vision 3 and Using LibreOffice in Vision+ for details.

Which Products are Affected by Switching to LibreOffice?

- The following functions are affected in **Vision 3**:
- Settings & Template Folder Structure
- Word Processing Template Creation or Editing
- Creating Referral Letters
- Creating General Correspondence
- Conducting a Mail Merge in Patient Groups
- Generating Patient Services Registration Letters
- Using/Creating Guidelines and Local Reports
- Clinical Document Viewer
- The following functions are affected in **Vision+**:
- Creating Mail Merge Templates
- Sending Mail Merge Letters
- **Vision+** now supports the generation of **LibreOffice Calc** extract reports, equivalent to **Microsoft Excel** specialist reports
- **Vision+** now supports the generation of patient documents, for example Insurance reports

Other information:

- SmartTags are not compatible with **LibreOffice**.

Note - **Vision** manage **LibreOffice** within the hosted environment whilst local desktop requirements are managed by health boards.

Default Application Settings

Microsoft Word is the default programme to open .docx and standard **Microsoft Word** files.

LibreOffice Writer is the default for opening .odt and other standard **LibreOffice** files.

Microsoft Excel is the default for opening .xls and standard **Microsoft Excel** files.

LibreOffice Calc the default for opening .ods and other standard **LibreOffice** files.

Important – If prompted, it's important that these defaults are not changed as they may inhibit the template re-creation process.

Using LibreOffice in Vision 3

LibreOffice is a free office suite that can be used for all your word processing tasks.

This is now installed on your hosted desktop, look for **LibreOffice Writer** .

Vision 3 is now ready to use **LibreOffice** for all your Practice, Patient, Recall and Referral template letters.

For further information on **LibreOffice**, see https://www.libreoffice.org.

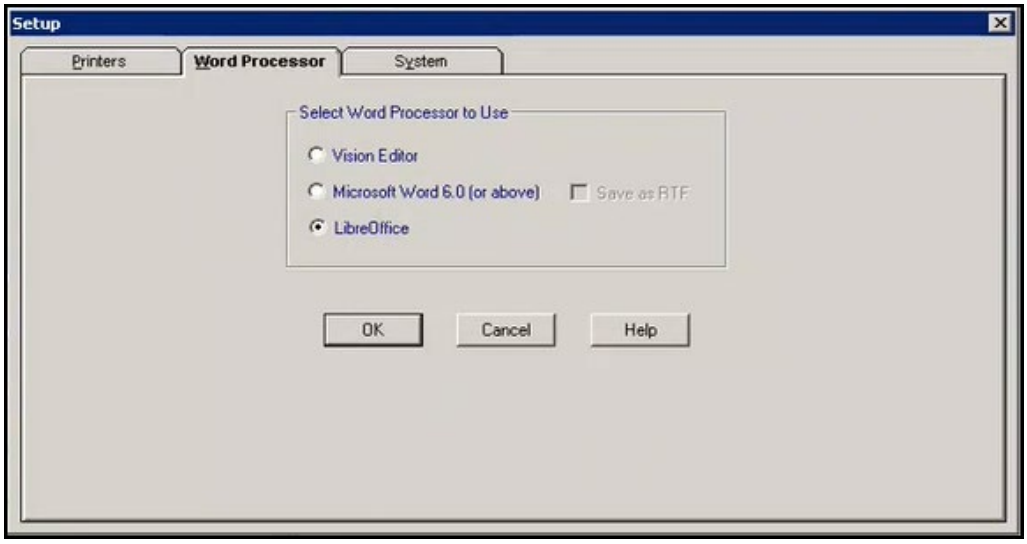
Note - **LibreOffice** can open **Microsoft Office** files such as .docx or .xlsx, however, importantly merge fields are different when creating letter templates.

Default Word Processor

Switching an Individual Workstation to using LibreOffice

To switch the default word processor for the workstation you are using to **LibreOffice**:

1. From the **Vision 3** front screen, select **Options** - **Setup**.
2. The **Setup** screen displays, from the **Word Processor** tab select **LibreOffice**.



3. Select **OK** to save.

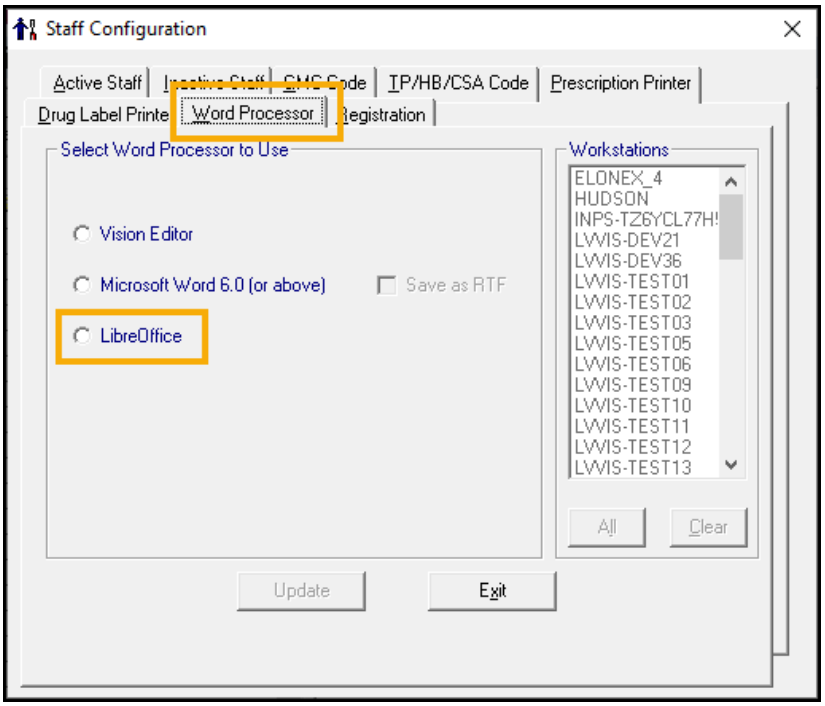
Switching Multiple Workstations to using LibreOffice

Training Tip – Re-create sufficient **Vision 3 LibreOffice** templates before switching all workstations to **LibreOffice**.

To switch multiple workstations over to using **LibreOffice** as their default word processor:

1. From the **Vision 3** front screen, select **Management Tools** - **Control Panel**- **File Maintenance** and then **Config**

.
2. The **Staff Configuration** screen displays, select the **Word Processor** tab.



3. Select **LibreOffice**.
4. From **Workstations** select the workstations you would like to set to using **LibreOffice** as a default or choose **All** to select all workstations.
5. Select **Update** to save.

You use **LibreOffice** templates in the same way as your **Microsoft Word** templates. From anywhere in **Vision 3** where you would access your templates from, for example, a screen with a **Letter**

option, select it in the same way as before and **Vision 3** simply offers your **LibreOffice** templates instead of the **Microsoft Word** templates.

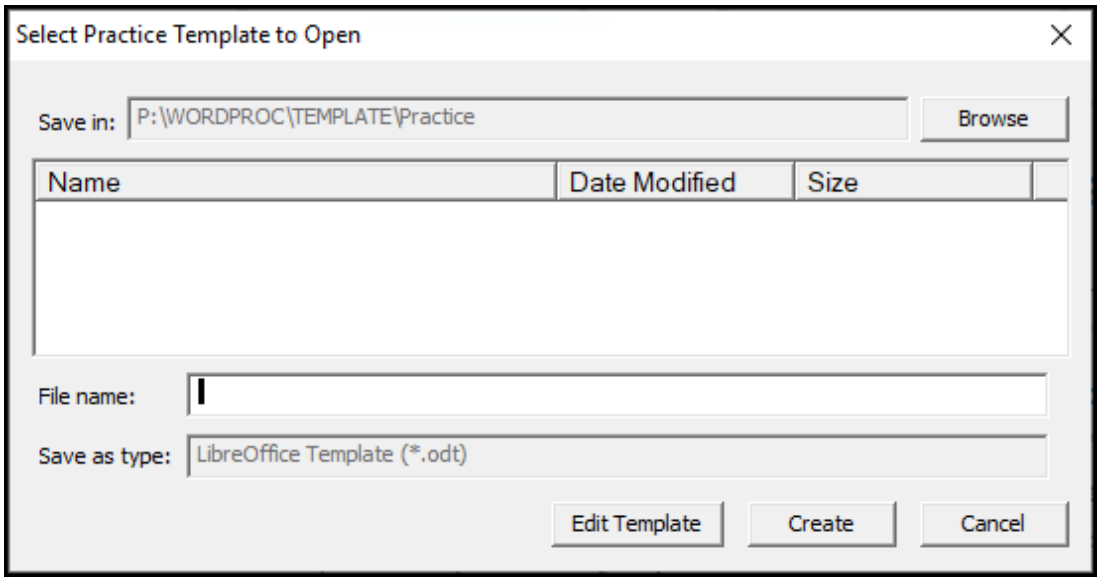
Note - The Patient Facing Services Registration Letter updates to **LibreOffice** once you select **LibreOffice** as your word processor of choice.

Creating New Vision 3 Templates in LibreOffice

To create a template:

1. From the **Vision 3 Front Screen**, select **Utilities** - **Word Processor**.
2. The **Vision Word Processor screen** displays, select the type of template you wish to create:
    - **Practice** - Practice details are available, for example, practice, address or telephone number.
    - **Patient** - In addition to the **Practice** information, basic demographic and clinical data merge options are available.
    - **Recall** - In addition to the **Patient** information, recall data merge options are available.
    - **Referral** - In addition to the **Patient** information, referral data merge options are available.

    See Available Merge Fields – Vision 3 for details.
3. Select **Create Template**.
4. The **Select [Template Type] Template to Open** screen displays, in **File name** enter a name for your template.

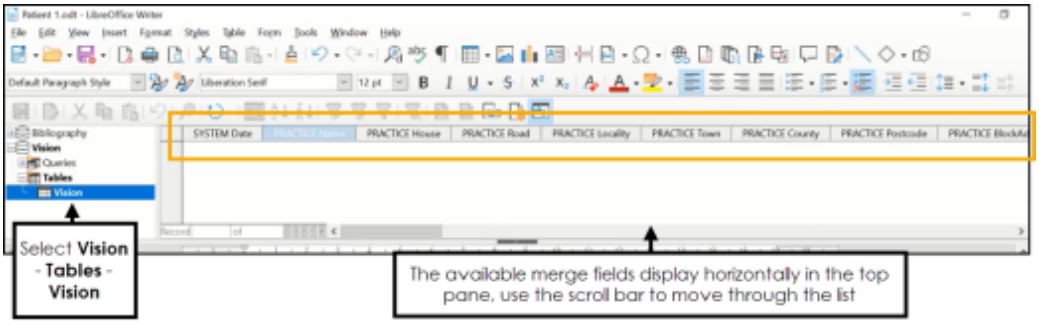


- Save your template to the default folder, or
    - Select **Browse** and either:
    - Navigate to an existing subfolder within the default folder, or …
    - Select **Make New Folder** to create a new subfolder. Enter a name for your new folder in **Folder** and select **OK**. Your new folder displays in **Save in.**

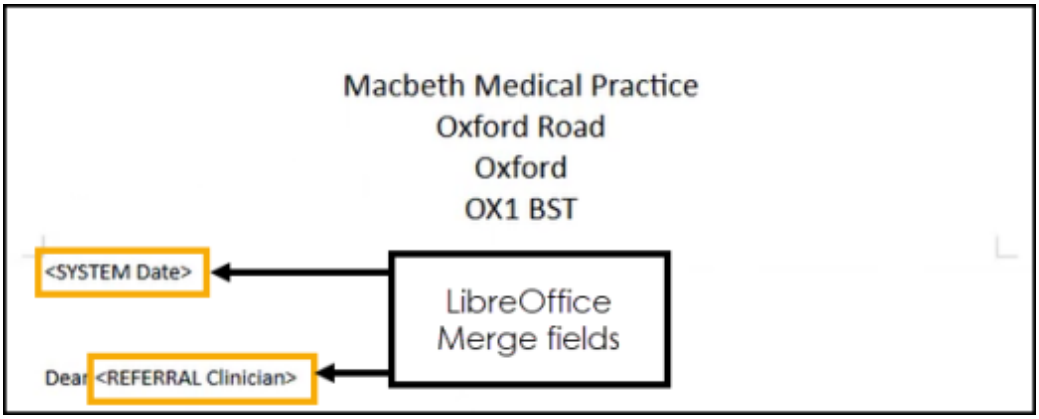
5. Select **Create** and **LibreOffice** opens with a blank document.
6. Create your template letter, selecting the relevant merge fields where appropriate, you can move them around or copy them to other areas of the document as required.

   You can insert merge fields in **LibreOffice** in two ways:

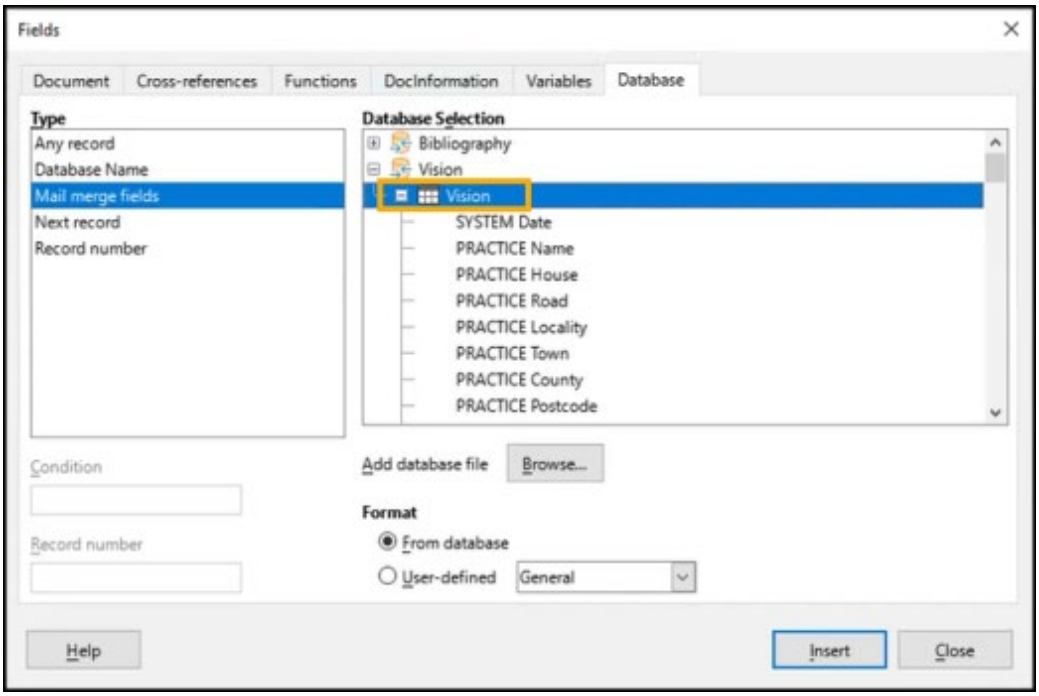
    - From the side pane, select **Vision** - **Tables** - **Vision** and the merge fields display horizontally across the top pane.



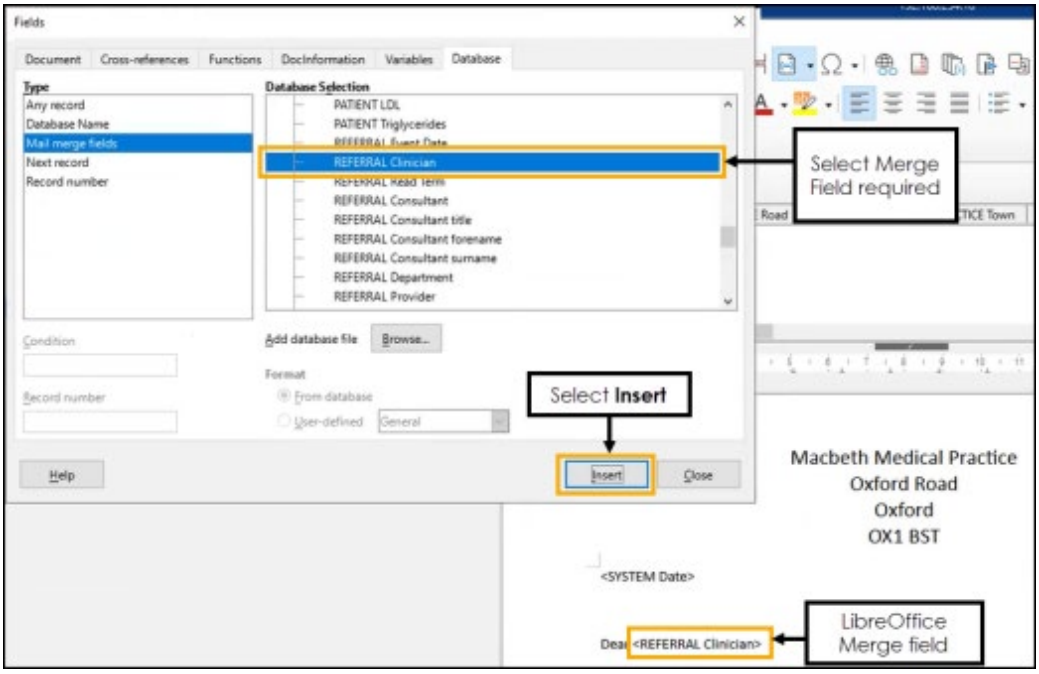
   Drag and drop the merge field onto the document.



- Select **Insert** - **Field** - **More Fields** to open the **Fields** screen. From the **Database** tab under **Type** choose **Mail merge fields**. Expand **Vision** under **Database Selection** to view the available merge fields



Select in the document where you'd like to insert the merge field and double click on the required mail merge field or select from the **Fields** screen and select **Insert**.



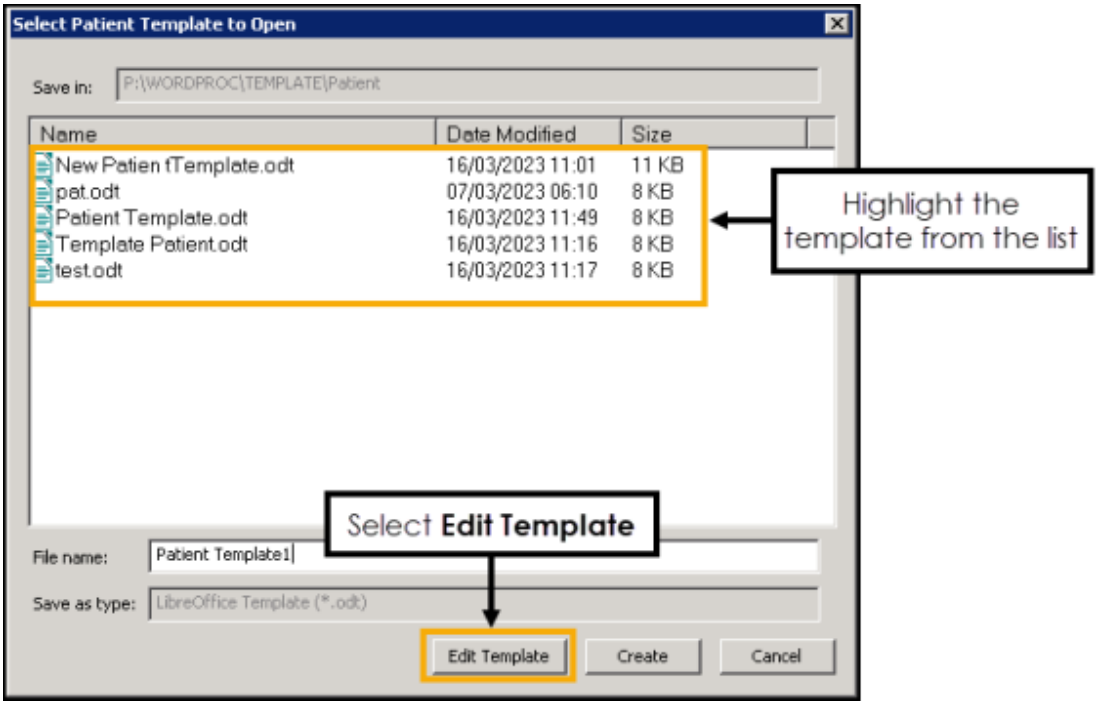
7. You can use all the familiar word processing features in **LibreOffice** to make the layout of the template more attractive.

8. Select **Save** and **Close** and the template automatically saves with the name allocated, in the folder selected.

Editing LibreOffice Templates

To edit a **LibreOffice** Template:

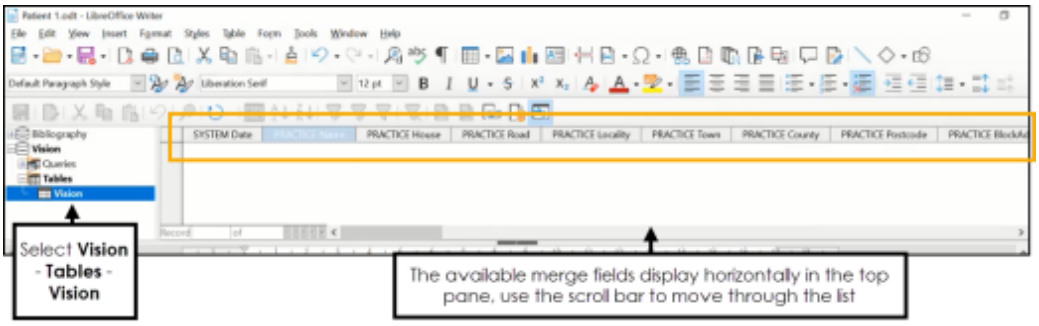
1. From the **Vision 3 Front Screen**, select **Utilities** - **Word Processor**.
2. The **Vision Word Processor screen** displays, select the type of template you are editing:
    - **Practice**
    - **Patient**
    - **Recall**
    - **Referral**
3. Select **Create Template**.
4. The **Select [Template Type] Template to Open** screen displays listing the templates in that specific template folder. For example, selecting a template type of **Practice** lists all templates in **P:\WORDPROC\TEMPLATE\Practice**. Select the template to edit.



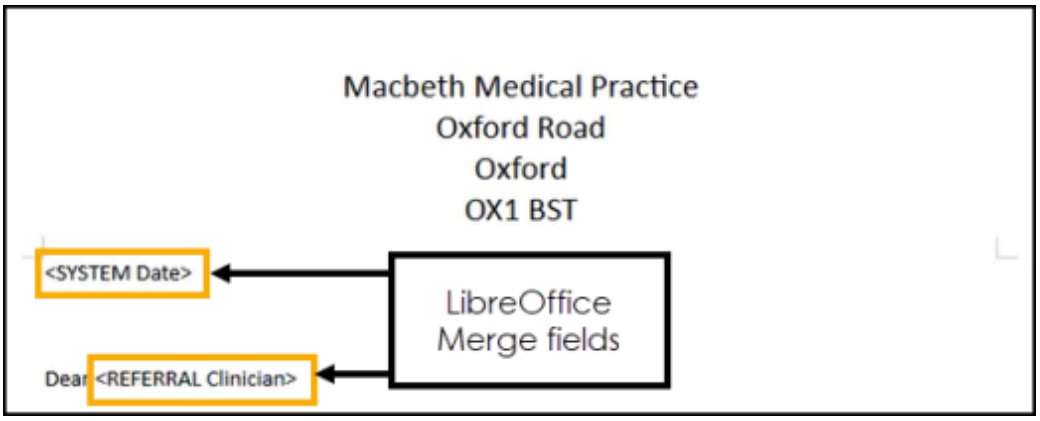
5. Select **Edit Template** and **LibreOffice** opens the selected template.

6. Insert the merge fields, you can do this in two ways:

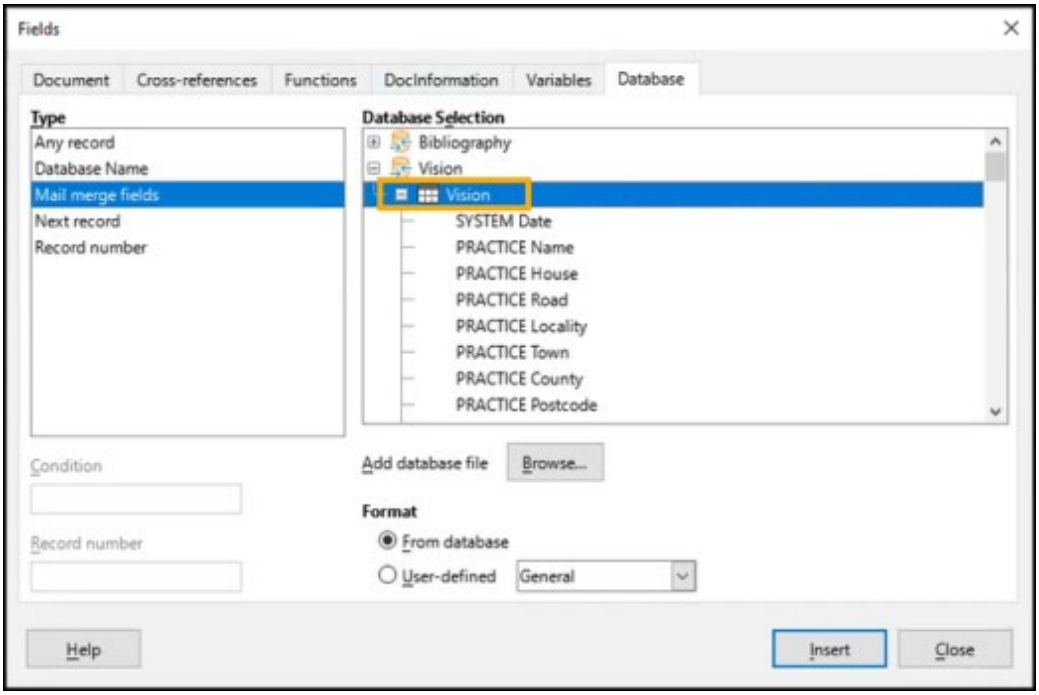
    - From the side pane, select **Vision** - **Tables** - **Vision** and the merge fields display horizontally across the top pane.



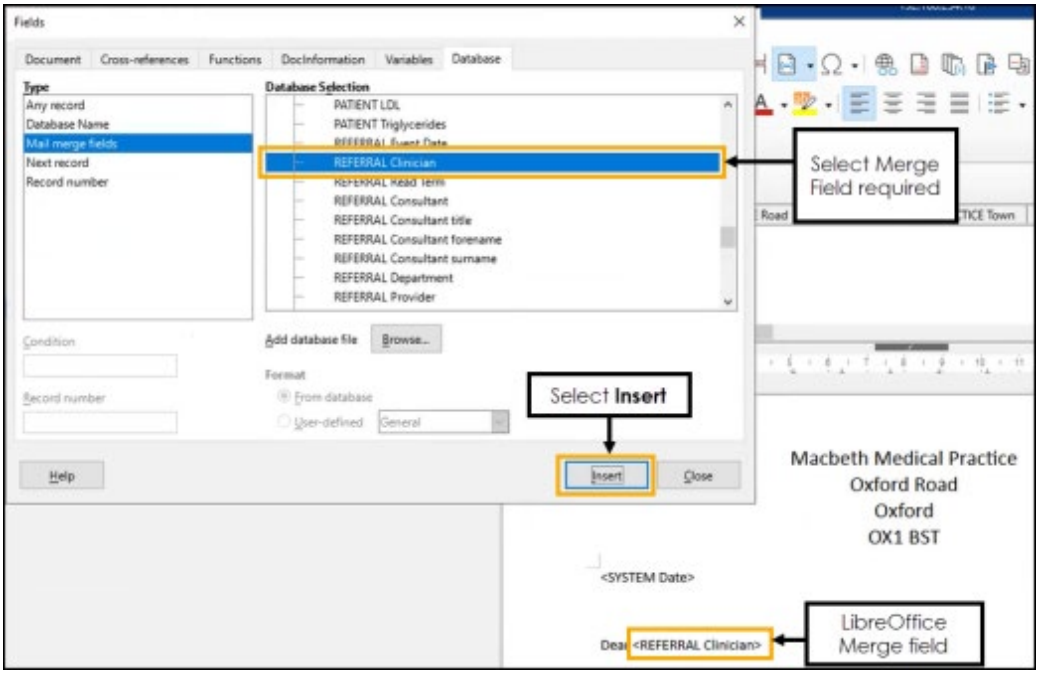
Drag and drop the merge field onto the document.



- Select **Insert** - **Field** - **More Fields** to open the **Fields** screen. From the **Database** tab under **Type** choose **Mail merge fields**. Expand **Vision** under **Database Selection** to view the available merge fields



Select in the document where you'd like to insert the merge field and double click on the required mail merge field or select from the **Fields** screen and select **Insert**.



7. You can use all of the familiar word processing features in **LibreOffice** to make the layout of the template more attractive.

8. Select **Save** and **Close**

Converting Word templates to LibreOffice using the LibreOffice to Word Conversion Tool

The **LibreOffice to Word Conversion Tool** is used to convert existing Microsoft Word templates into LibreOffice formats. The tool supports both **Vision 3** and **Vision+** templates and is designed to reduce manual effort when moving to LibreOffice.

The **LibreOffice to Word Conversion To**ol carries out the following:

- Scans existing Microsoft Word templates (.doc / .docx).
- Identifies which templates can be converted.
- Automatically converts eligible templates to LibreOffice (.odt).
- Creates required LibreOffice template folders if they do not already exist.
- Logs the outcome of each conversion into a viewable log file.

Note:

- The tool does not convert templates that contain Microsoft Word macros.
- SmartTags are not supported in LibreOffice.

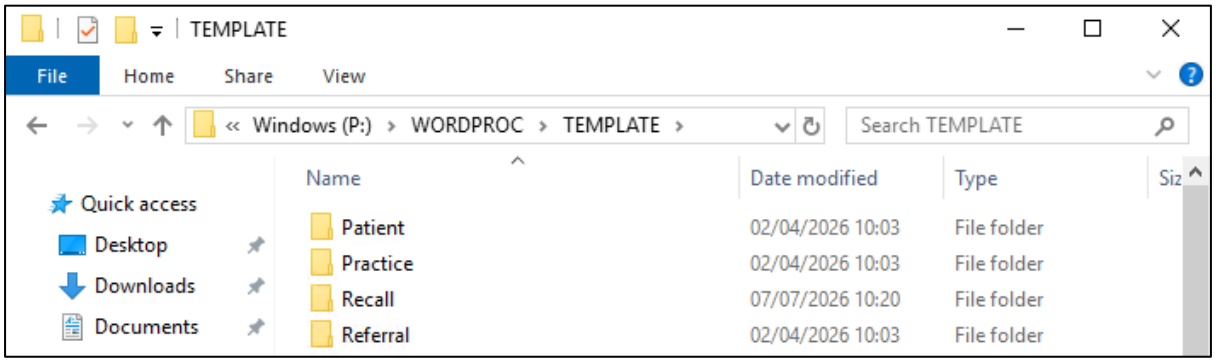
Supported Templates

The tool evaluates and converts the following template types:

Vision 3 Templates

- Practice
- Patient
- Recall
- Referral

These are in the following folder:
P:\WORDPROC\TEMPLATE



Important Note: The conversion process only picks up templates stored directly in the **Patient**, **Practice**, **Recall** and **Referral** folders. It does not look inside any subfolders that may have been created within them, so any templates in those subfolders will be skipped. Before conversion, move templates out of any subfolders and into the root of the relevant folder (Patient, Practice, Recall or Referral).

Once the conversion process has been executed, the converted templates are saved to the following locations based on their type:

- P:\WORDPROC\TEMPLATE**Practice**
- P:\WORDPROC\TEMPLATE**Patient**
- P:\WORDPROC\TEMPLATE**Recall**
- P:\WORDPROC\TEMPLATE**Referral**

Vision+ Templates

- Letter templates.

These are in the following folder:

- **P:\VisionPlus\[PracticeCode]\Letters\Templates**

Note: The practice code is automatically retrieved by the tool.

Preparation before running the Conversion Tool

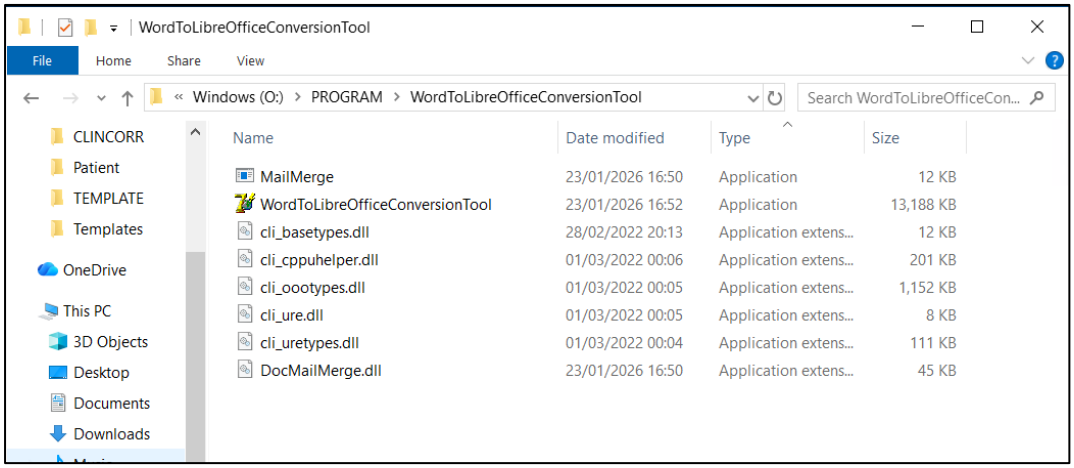
Before running the conversion tool:

- Ensure **LibreOffice is installed** on the hosted desktop.
- Ensure **LibreOffice is not already running**.
- Close **Microsoft Word**.

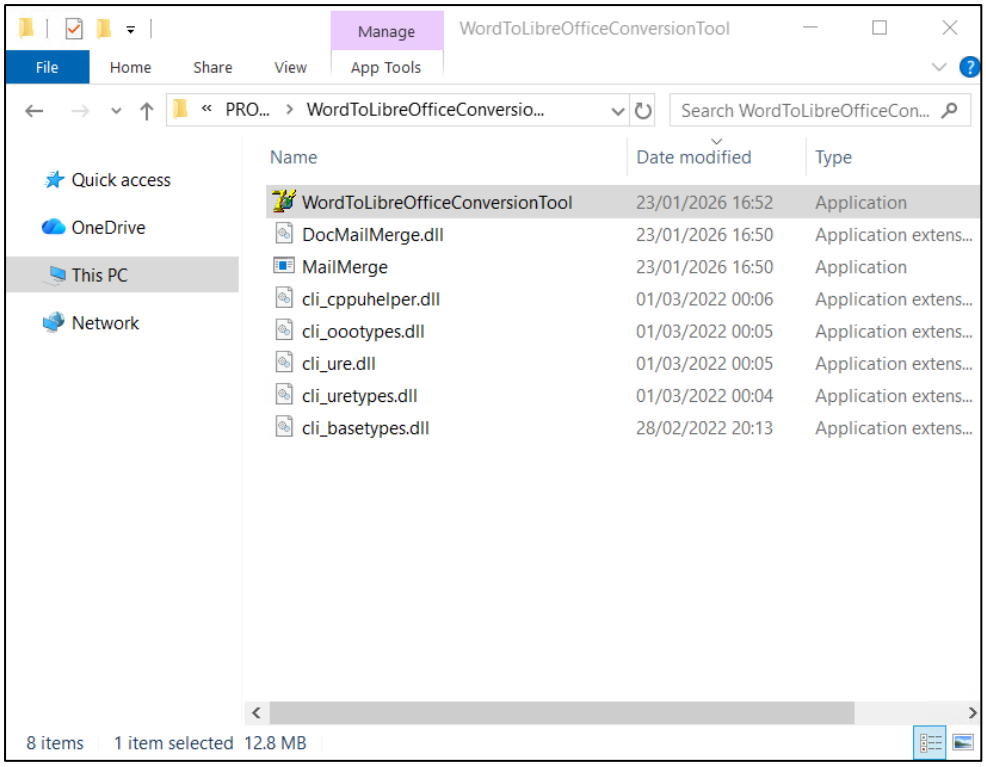
If LibreOffice is not installed or is currently running, you will be prompted to restart the application.

Running the Conversion Tool

1. Using Windows file Explorer, navigate to the **O:\PROGRAM\WordToLibreOfficeConvertionTool** folder.
2. Select the folder to view the files.

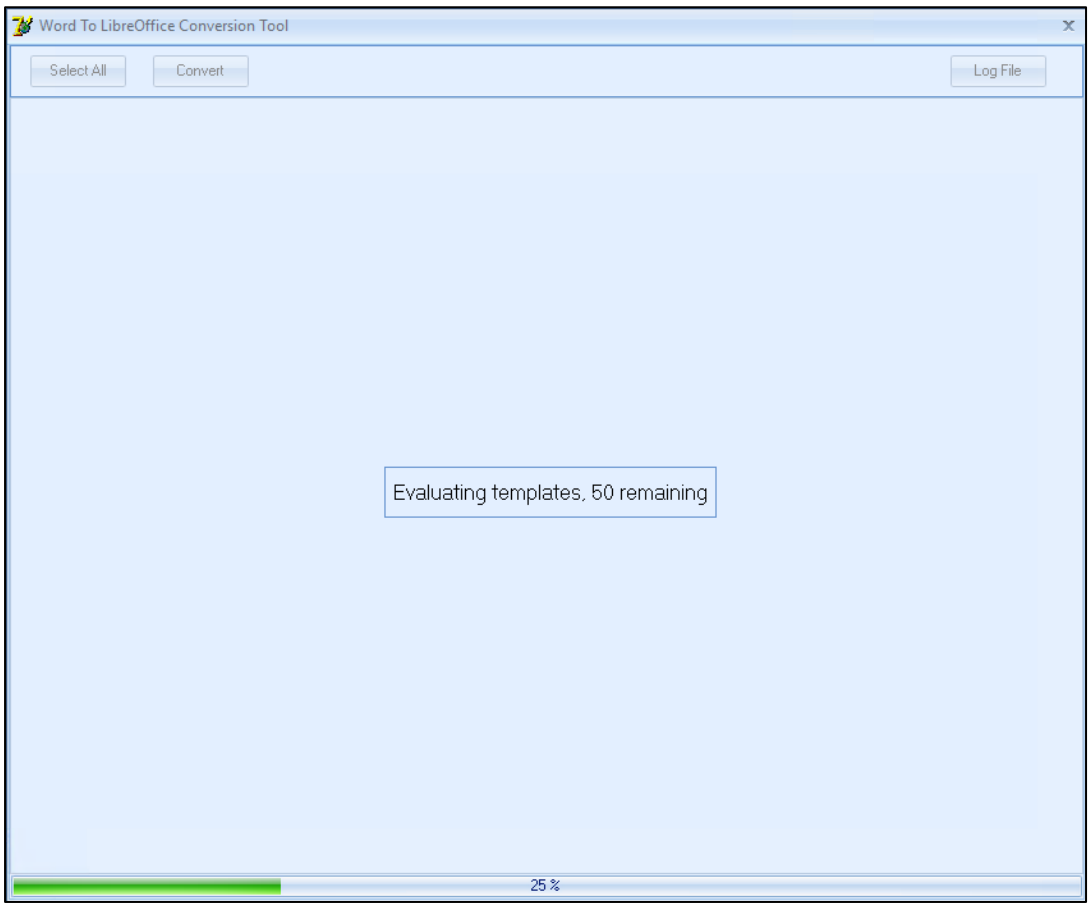


3. Locate and double-click the **WordToLibreOfficeConversionTool** application.



Note: Double clicking the application immediately begins the **Evaluating templates** process.

The Evaluating templates process

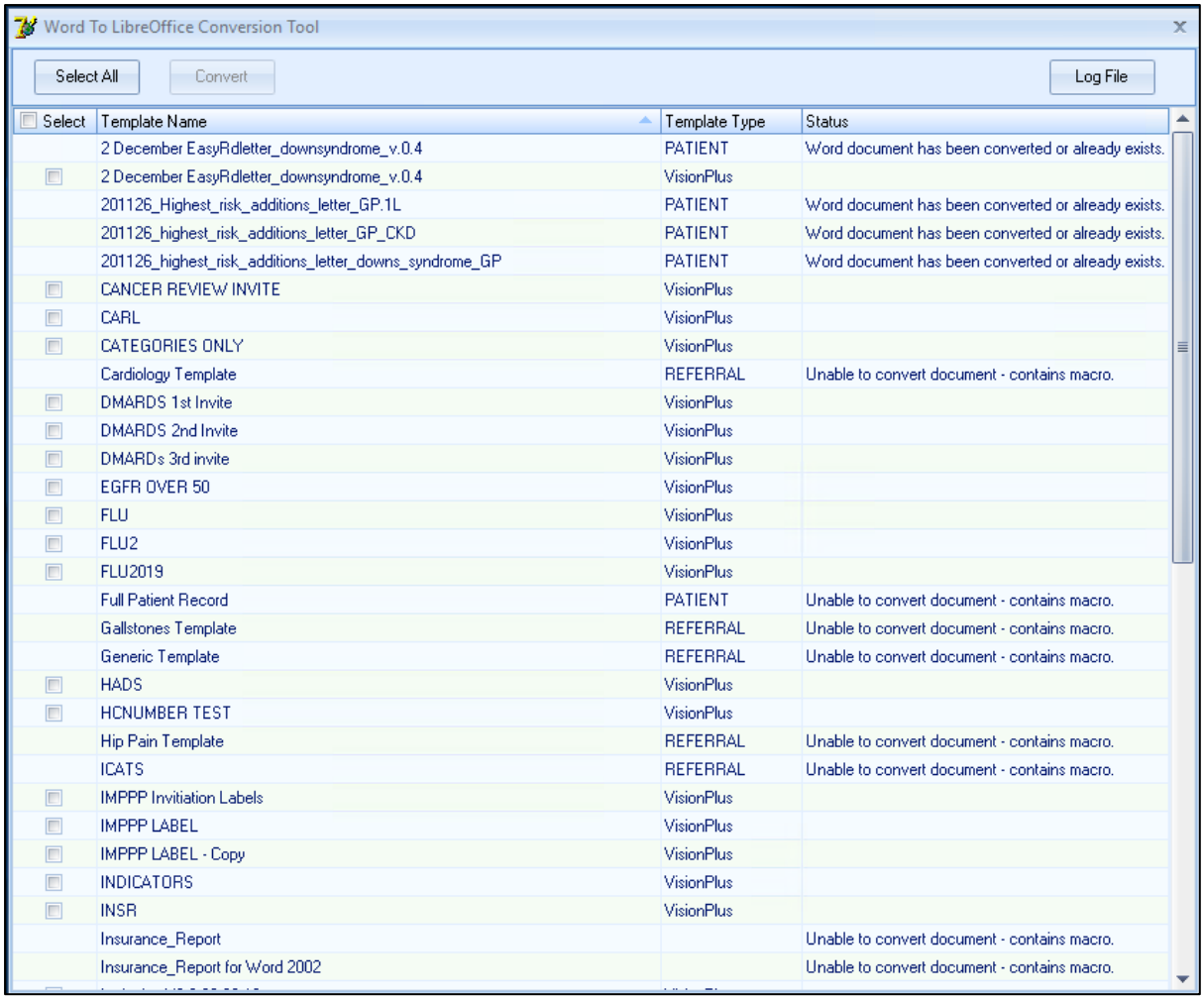


Once you have activated the application, the Word to LibreOffice Conversion Tool window opens and the evaluation process starts and displays the following:

- A message displaying: **Evaluating templates** followed by the total **number of templates** found in the specified folders.
- A progress bar displays to indicate that the evaluation is in progress.

Viewing the results of the Evaluation ready for Conversion

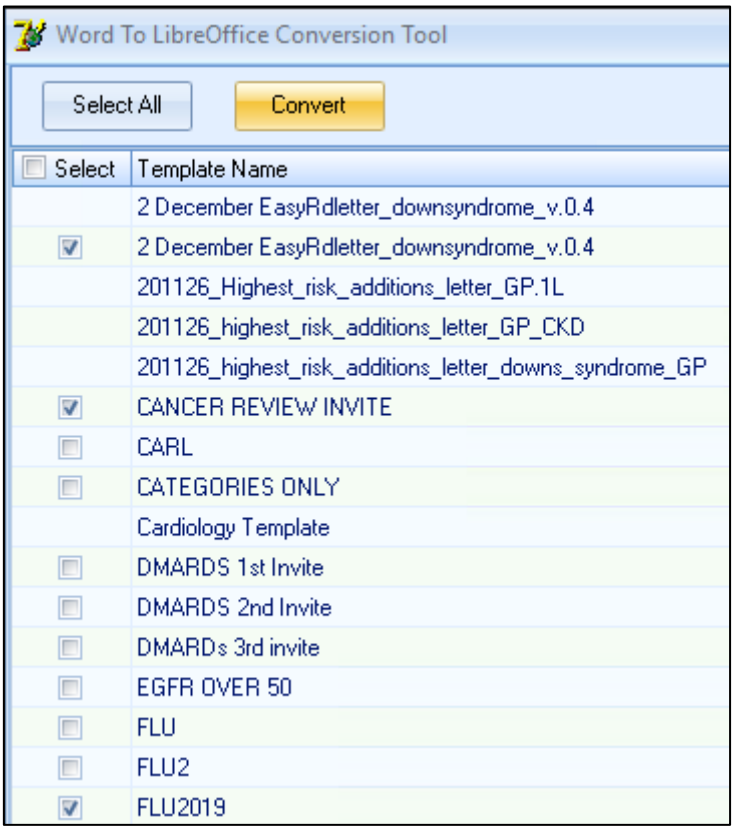
Once the evaluation phase is complete, the Microsoft Word templates are presented in the Word to LibreOffice Conversion Tool table, ready for selection for the conversion process.



Select	Template Name	Template Type	Status
	2 December EasyRdletter_downsyndrome_v.0.4	PATIENT	Word document has been converted or already exists.
	2 December EasyRdletter_downsyndrome_v.0.4	VisionPlus	
	201126_Highest_risk_additions_letter_GP.1L	PATIENT	Word document has been converted or already exists.
	201126_highest_risk_additions_letter_GP_CKD	PATIENT	Word document has been converted or already exists.
	201126_highest_risk_additions_letter_downs_syndrome_GP	PATIENT	Word document has been converted or already exists.
	CANCER REVIEW INVITE	VisionPlus	
	CARL	VisionPlus	
	CATEGORIES ONLY	VisionPlus	
	Cardiology Template	REFERRAL	Unable to convert document - contains macro.
	DMARDS 1st Invite	VisionPlus	
	DMARDS 2nd Invite	VisionPlus	
	DMARDs 3rd invite	VisionPlus	
	EGFR OVER 50	VisionPlus	
	FLU	VisionPlus	
	FLU2	VisionPlus	
	FLU2019	VisionPlus	
	Full Patient Record	PATIENT	Unable to convert document - contains macro.
	Gallstones Template	REFERRAL	Unable to convert document - contains macro.
	Generic Template	REFERRAL	Unable to convert document - contains macro.
	HADS	VisionPlus	
	HCNUMBER TEST	VisionPlus	
	Hip Pain Template	REFERRAL	Unable to convert document - contains macro.
	ICATS	REFERRAL	Unable to convert document - contains macro.
	IMPPP Invitiation Labels	VisionPlus	
	IMPPP LABEL	VisionPlus	
	IMPPP LABEL - Copy	VisionPlus	
	INDICATORS	VisionPlus	
	INSR	VisionPlus	
	Insurance_Report		Unable to convert document - contains macro.
	Insurance_Report for Word 2002		Unable to convert document - contains macro.

The table contains the following columns:

- **Select** Column



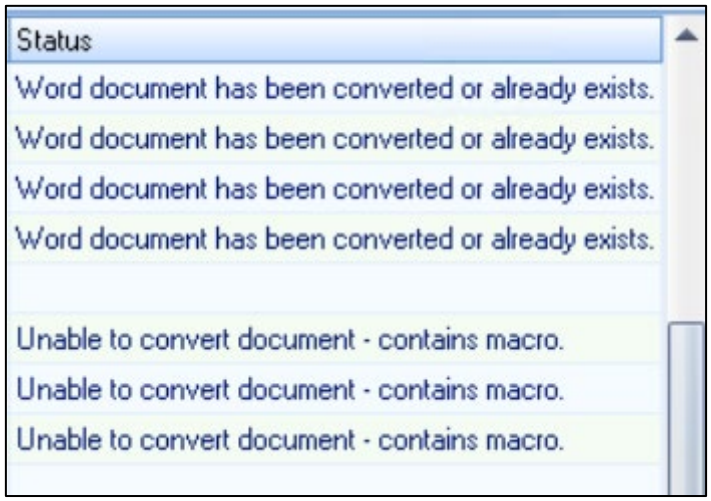
  - The **Select** column is used to individually choose templates to run through the conversion process. Alternatively use the **Select Check box** at the top of the column or the **Select All** Button to mark all eligible templates ready to convert.

- **Template Name** Column

  - The **Template Name** column displays the name of the Word templates found during the evaluation process

- **Template Type** Column

  - The **Template Type** column identifies the classification of templates found. These are:
    - PRACTICE
    - PATIENT
    - RECALL
    - REFFERRAL
    - VisionPlus
- **Status Column**



This shows the outcome or eligibility of each template:

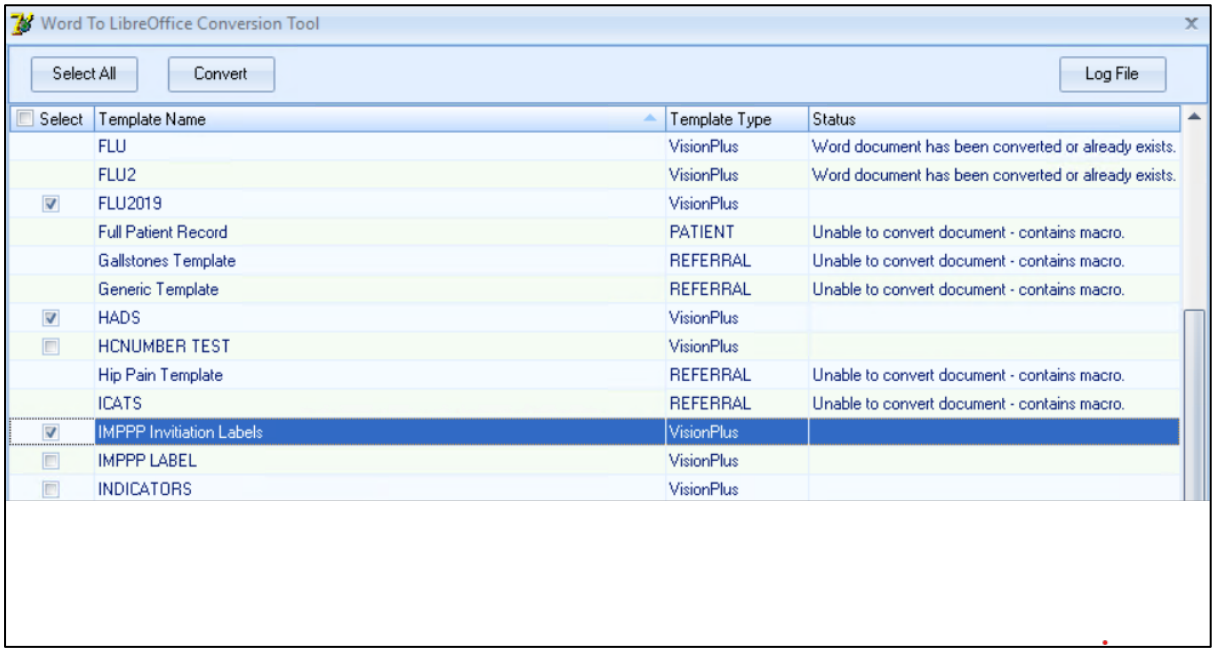
- **Unable to convert document – contains macro**
  The template includes a Microsoft Word macro and cannot be converted.
- **Word document has been converted or already exists**
  A LibreOffice version already exists.
- **Blank status**
  The template is eligible for conversion and can be selected.

Note - Only templates with a blank status can be converted.

Converting Templates

To convert templates:

1. Select individual templates or choose **Select All**.
2. Select **Convert**.

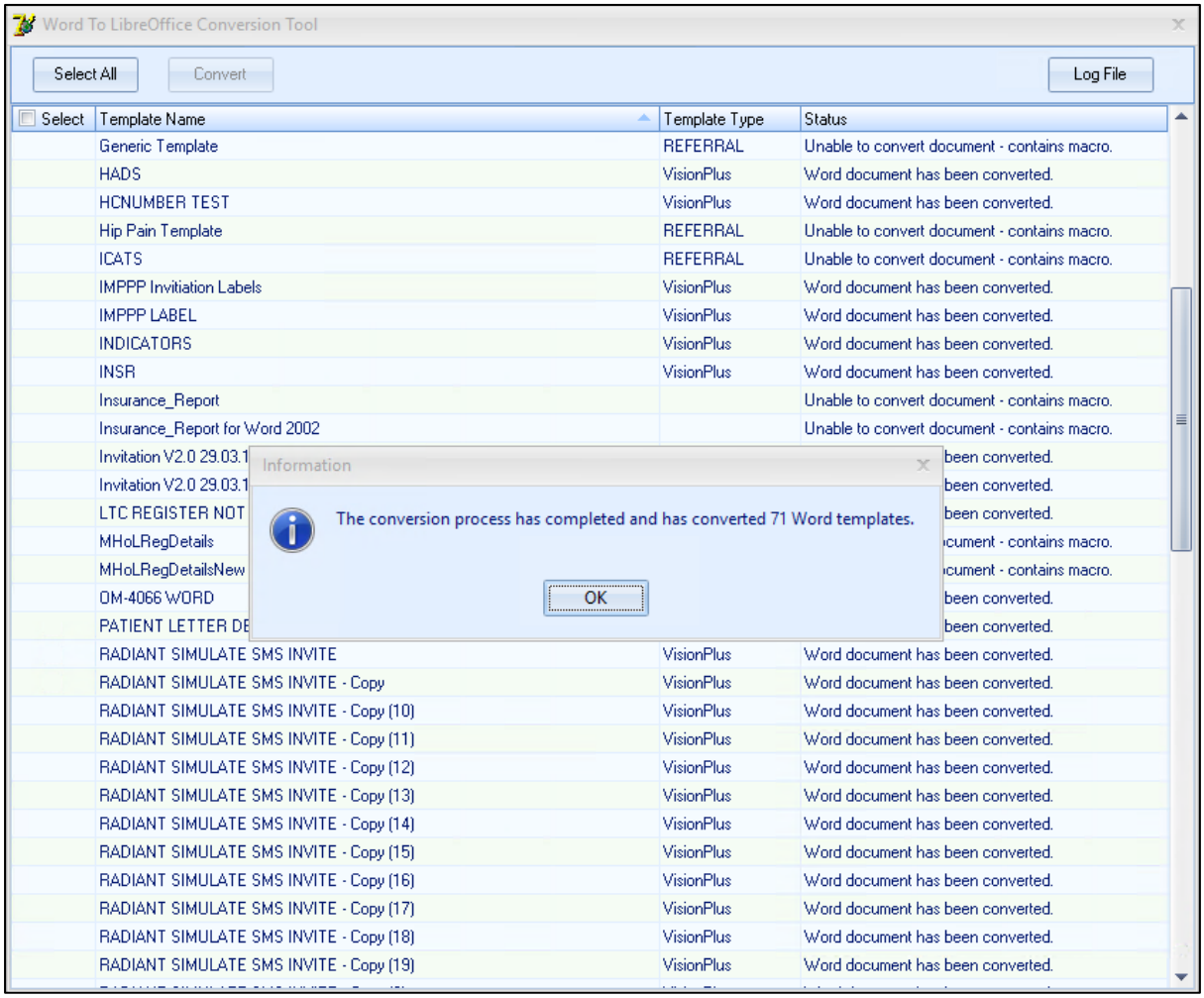


Note – Once **Convert** is selected, the conversion progress bar initiates and displays the current processing status.

When conversion finishes, a confirmation message displays:

The conversion process has completed and has converted X Word templates, where X represents the total number of templates processed.

3. Select **OK** to continue.



Viewing the Log File

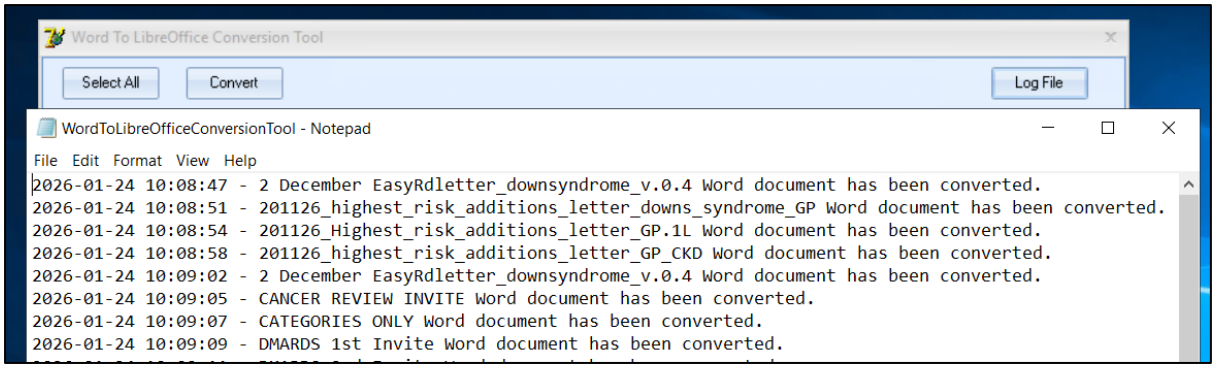
To review the details of the conversion:

- Select **Log File** to open the log.

The log lists:

- Template names
- The conversion outcomes
- Any templates that could not be converted

This is useful for auditing and troubleshooting.



After the conversion process has completed

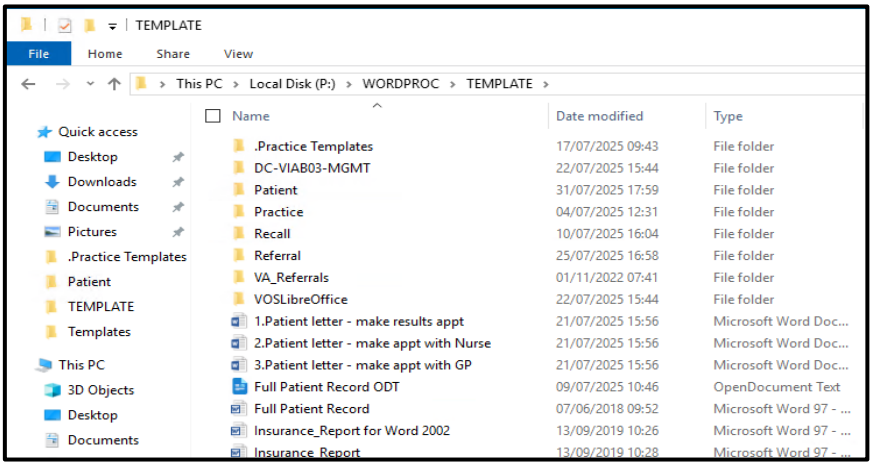
- Converted LibreOffice templates are ready for use in Vision
- Templates can be edited and refined in LibreOffice Writer

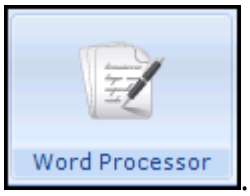
Note - Any templates containing macros must be recreated manually

Refer to Re-creating Microsoft Word Templates in LibreOffice section for manual Steps.

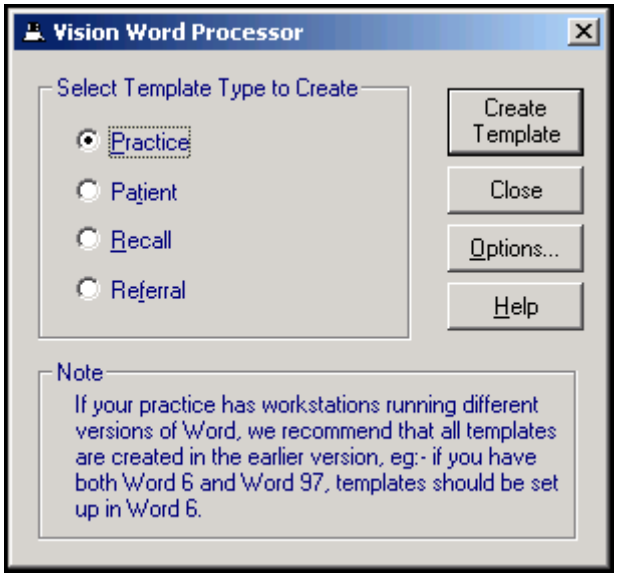
Manually Re-creating Microsoft Word Templates in LibreOffice

To re-create an existing **Microsoft Word** template as a **LibreOffice** template, you need to copy your existing **Microsoft Word** template content to a **LibreOffice** template and update the merge fields as per the instructions below. From File Explorer, locate the **Microsoft Word** template from **P:\WORDPROC\TEMPLATE**.



1. Right click on the template file and select **Open with LibreOffice Writer** to open the template file in **LibreOffice**.
2. Highlight the contents of the template and copy (**Ctrl** + **C** on your keyboard).
3. **Close** ☒ the **LibreOffice** document and if prompted, do not save changes at this stage.
4. Open **Vision 3**.
5. From **Utilities**, select **Word Processor** 

.
6. The **Vision 3 Word Processor** screen displays.

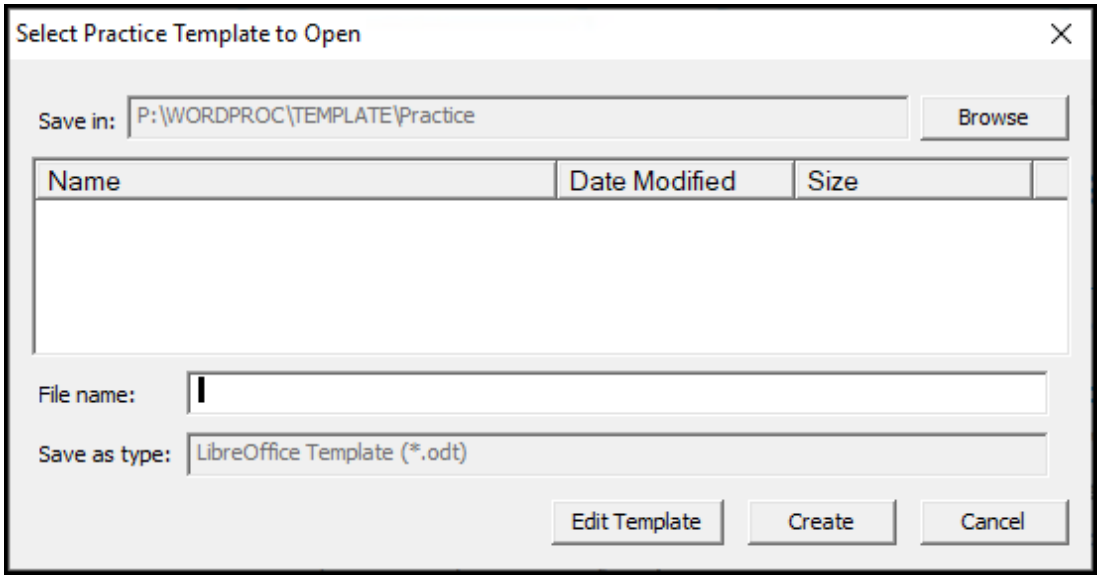


Select the template type required, either **Practice**, **Patient**, **Recall** or **Referral**.

7. Select **Create Template**.

8. The **Select [Template Type] Template to Open** screen displays listing the templates in that specific template folder. For example, selecting a template type of **Practice** lists all templates in **P:\WORDPROC\TEMPLATE\Practice**.

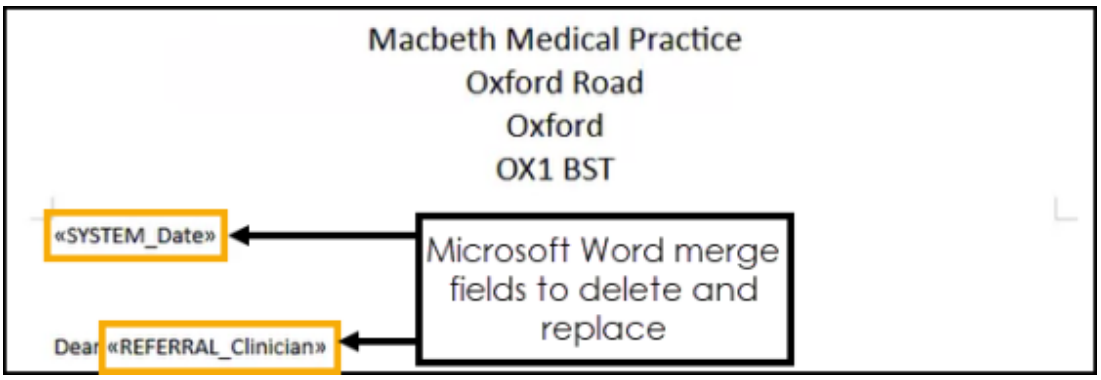
9. In **File name** enter a name for your template.



- Save your template to the default folder, or
    - Select **Browse** and either:
    - Navigate to an existing subfolder within the default folder, or …
    - Select **Make New Folder** to create a new subfolder. Enter a name for your new folder in **Folder** and select **OK**. Your new folder displays in **Save in.**

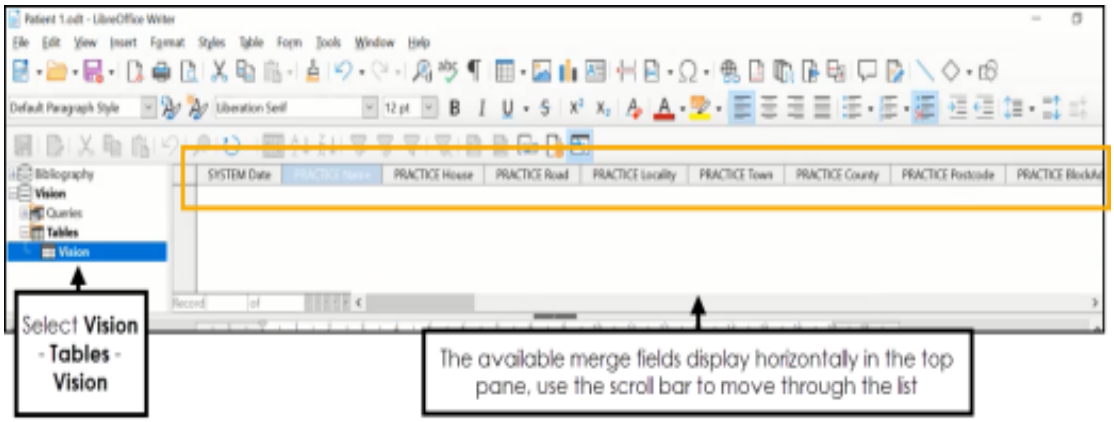
11. Select **Create** and **LibreOffice** opens with a blank document.
12. Paste (**Ctrl** + **V** on your keyboard) the copied content into the new **LibreOffice** template.

13. Replace all **Microsoft Word** merge fields with merge fields from **LibreOffice**. To do this you will need to delete the **Microsoft Word** merge fields and insert the merge fields available in **LibreOffice**.

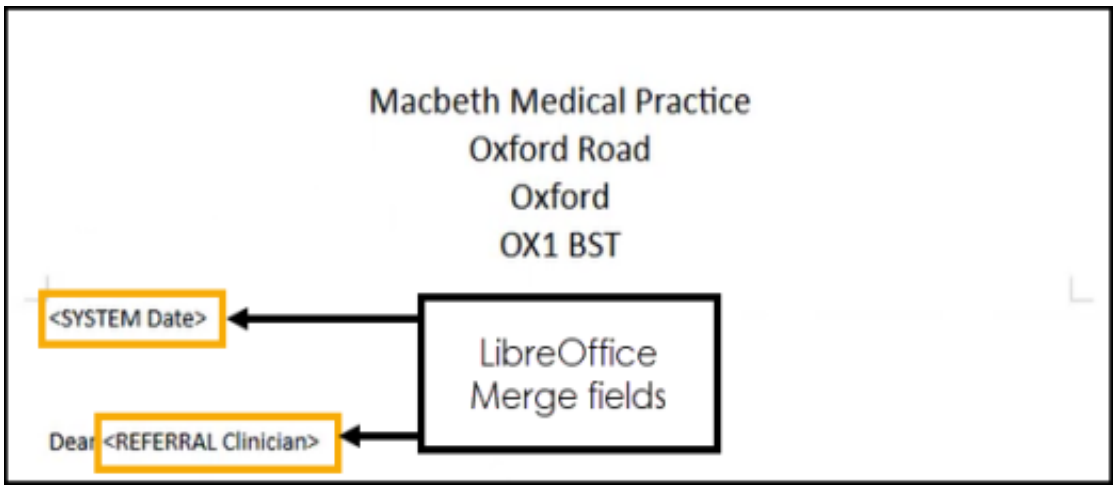


You can insert merge fields in **LibreOffice** in two ways:

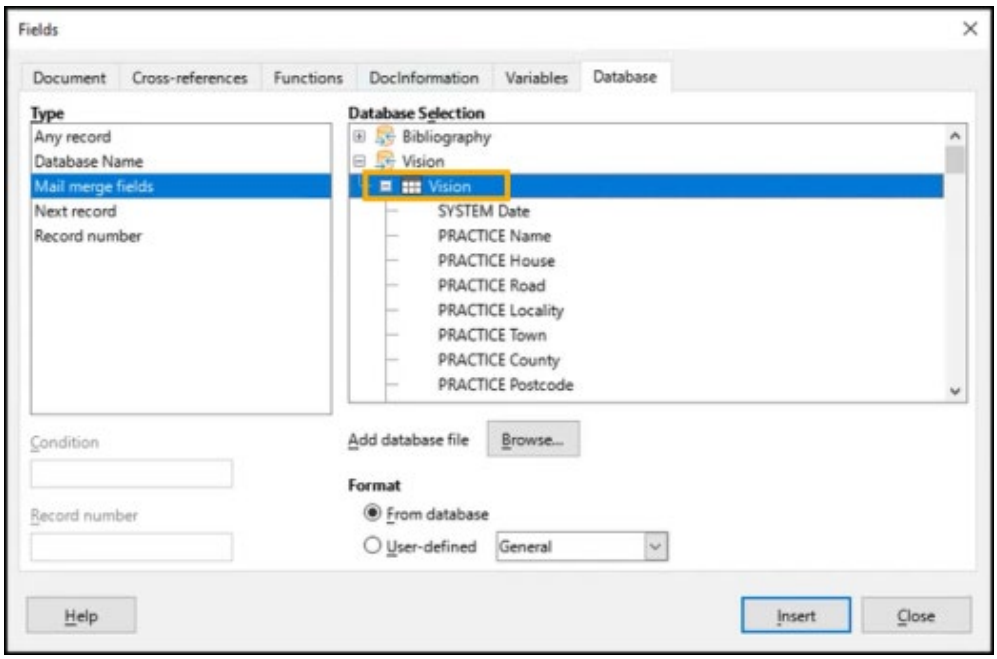
- From the side pane, select **Vision** - **Tables** - **Vision** and the merge fields display horizontally across the top pane.



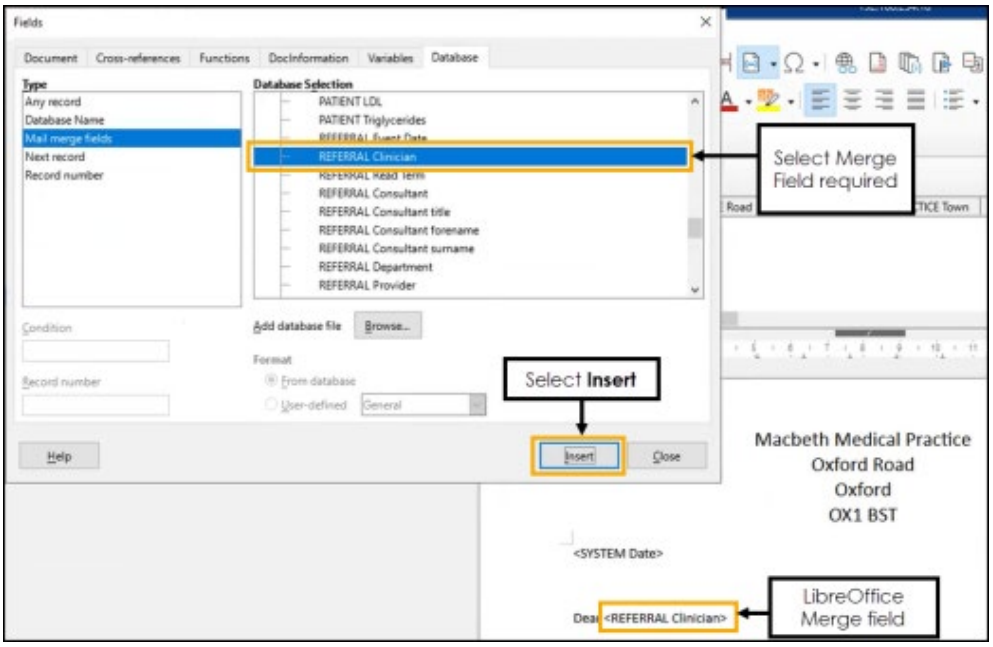
Drag and drop the merge field onto the document.



- Select **Insert** - **Field** - **More Fields** to open the **Fields** screen. Under **Type** select **Mail merge fields** and then under **Database Selection** expand **Vision** to view the available merge fields.



Select in the document where you'd like to insert the merge field and double click on the required mail merge field or select from the **Fields** screen and select **Insert**.



14. Ensure all **Microsoft Word** merge fields are deleted and replaced.

Training Tip - Merge fields in **Microsoft Word** display with a double chevron and underscores. Merge fields in **LibreOffice** display with a single chevron and spaces (no underscores).

15. You can use all the familiar word processing features in **LibreOffice** to make the layout of the template more attractive.

16. Select **Save** and **Close**

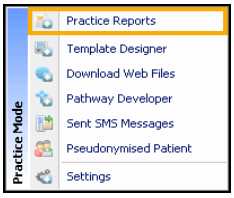
The **LibreOffice** template is now ready to use in **Vision 3**.

Creating New Vision+ Letter Templates in LibreOffice

Training Tip - To access the Vision+ Practice Reports, you must not have a patient selected in **Consultation Manager** or the patient-specific menu displays.

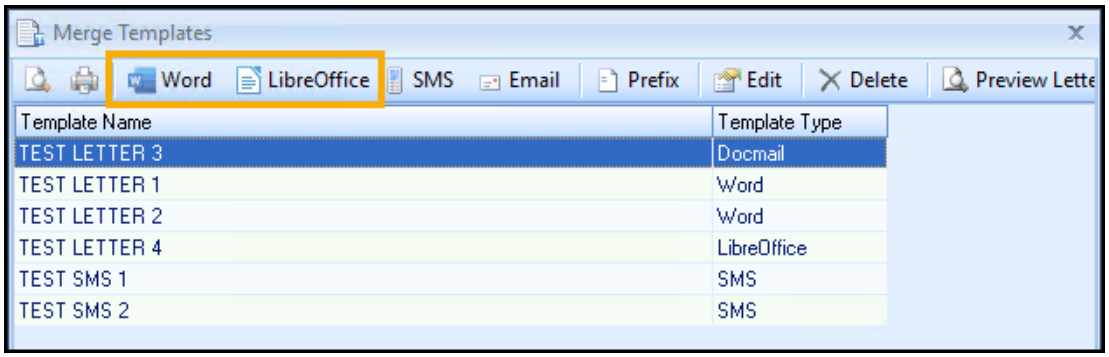
To create a template:

1. From the **Windows Notification Area**, right-click **Vision+** and select **Practice Reports**.



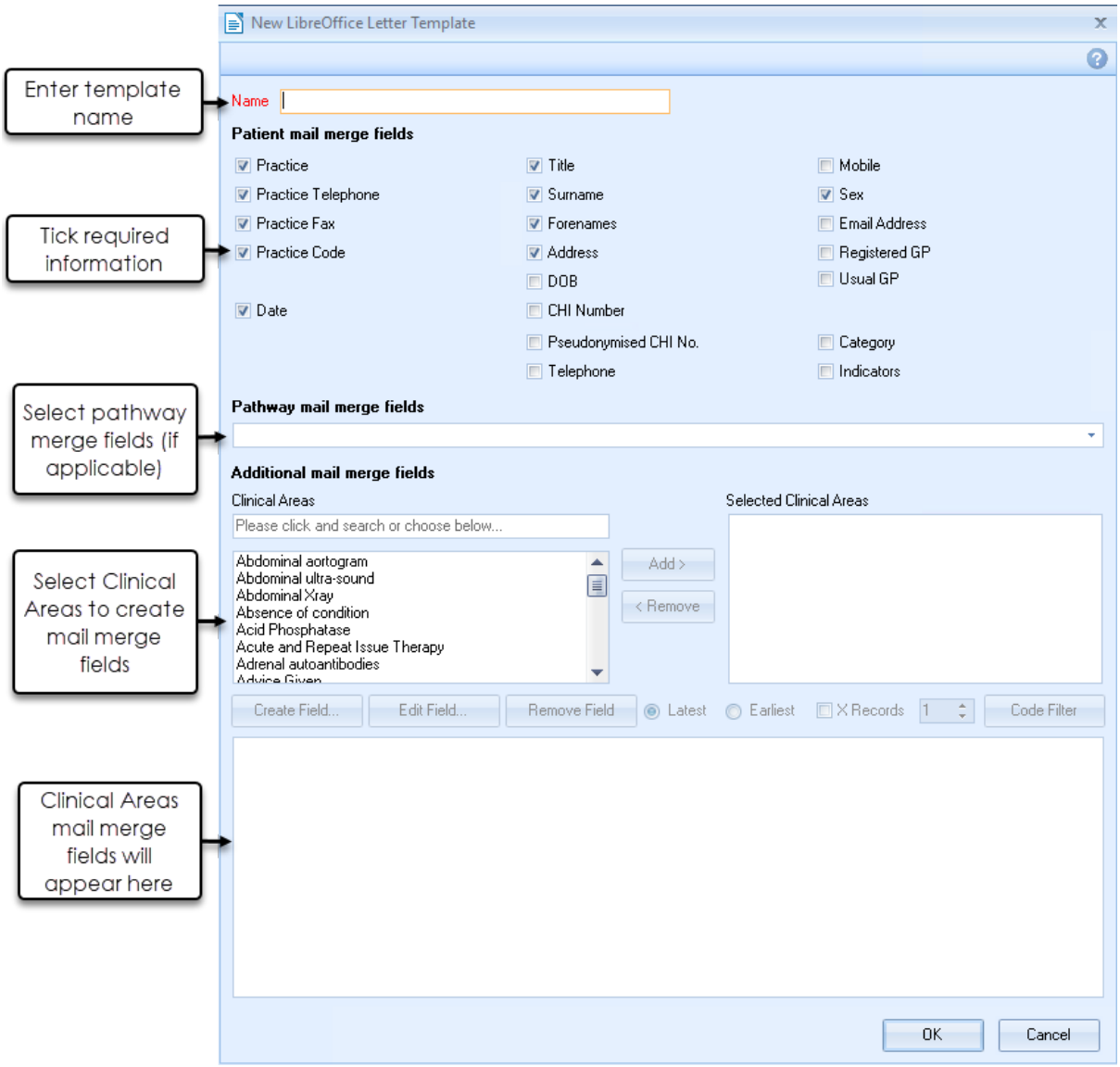
2. Select either **QOF** or **Practice Lists** as required and then select **Merge Templates**.

3. From the **Merge Templates** toolbar, select **LibreOffice**.



Note - The template options displayed are dependent on the word processing applications you have installed.

4. The **New LibreOffice Letter Template** screen displays, complete the following:



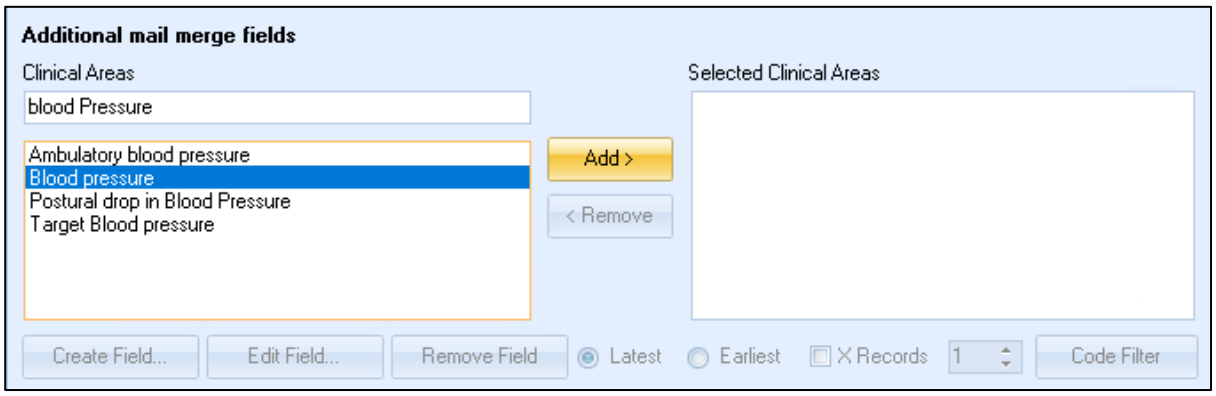
- **Name -** Enter a descriptive title for the new template.
- **Note** - The system does not let you have the same file name for **Microsoft Word** and **LibreOffice** templates in **Vision+**.
- **Patient mail merge fields Information -** Tick against each item of information from the patients records that you would like to merge into the letter or untick any items you do not require.
- **Note** - For Practices in Scotland the **NHS Number** merge field is replaced with **CHI Number** and for practices in Northern Ireland **H+C Number** is shown.

- **Pathway mail merge fields Data** - If applicable, select the Pathway name from the list to be included in the mail merge. When the pathway is selected, the merge fields available in the pathway are made available to the word processing application. This is a useful way of getting tailored patient data into letter form.

- **Clinical Areas –** Either type in the search box or choose Clinical Areas from the list to add to your Mail merge template. Each Clinical Area has its own predefined fields which you can configure using the Steps below:

Creating additional mail merge fields using Clinical Areas

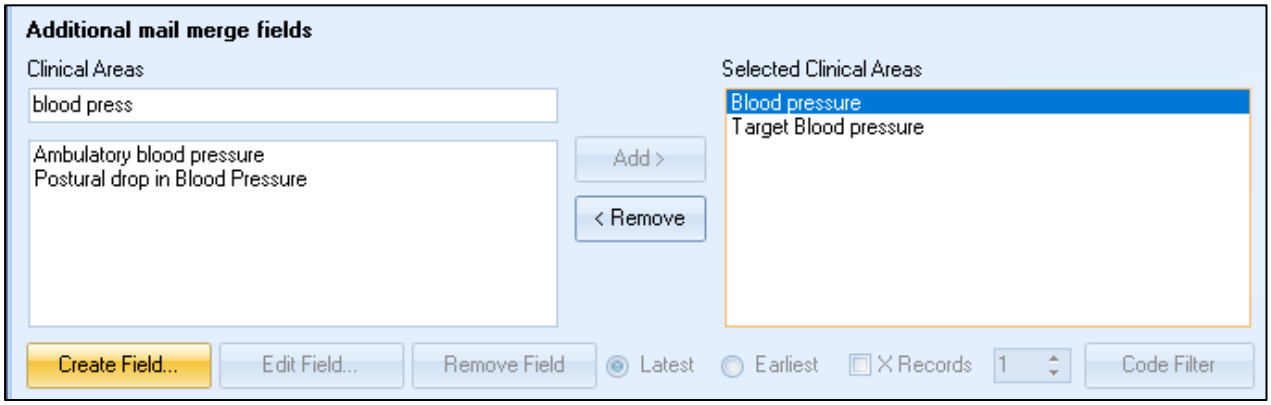
5. Within the **Additional mail merge fields** section, either use the search box and type in the Clinical Area name or scroll down until you locate the Clinical Area. Select the Clinical Area and then click **Add.** Select further areas as required.



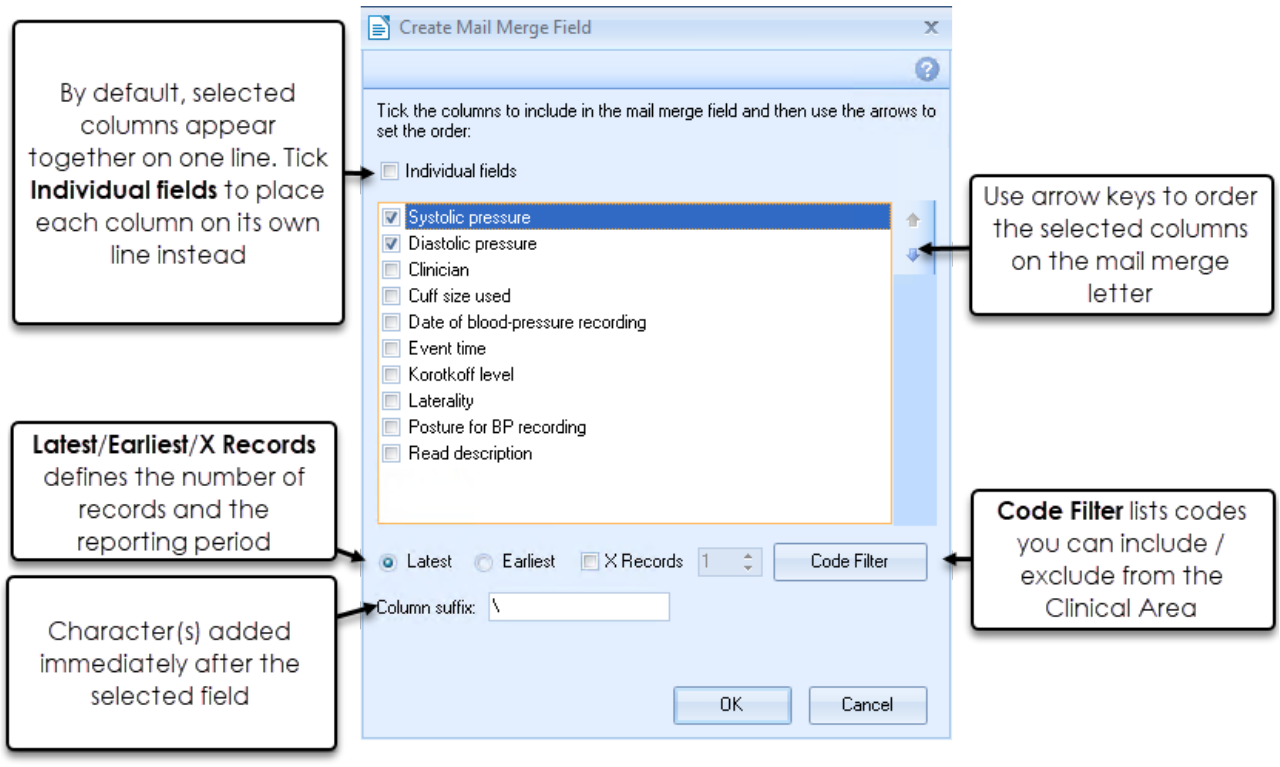
Important Note: When creating a **new** mail merge letter, adding multiple **Clinical Areas** at this step will insert them all into the LibreOffice Writer mail merge document. If you later **edit** the Letter template and create **new Clinical Area** fields, these will need to be inserted manually from the LibreOffice Writer screen.

See: Use **LibreOffice** to make any changes to the template layout that you require.

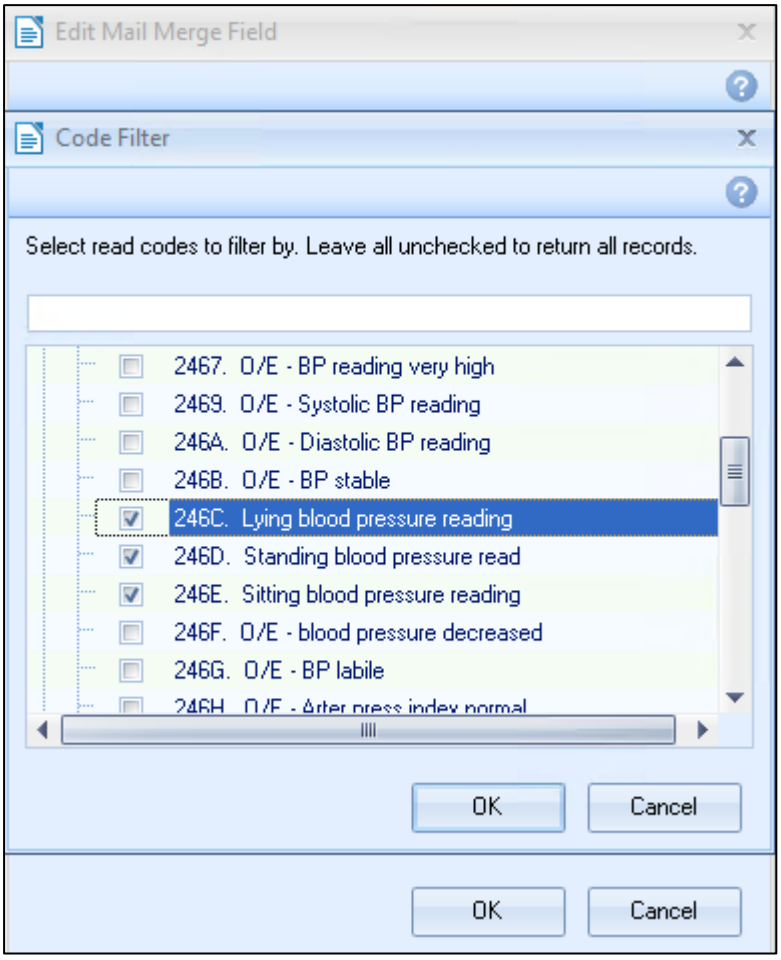
6. Once added, highlight a selected Clinical Area and click on the activated **Create Field** button.



7. Select the columns required, the layout and order and filter on codes as needed.

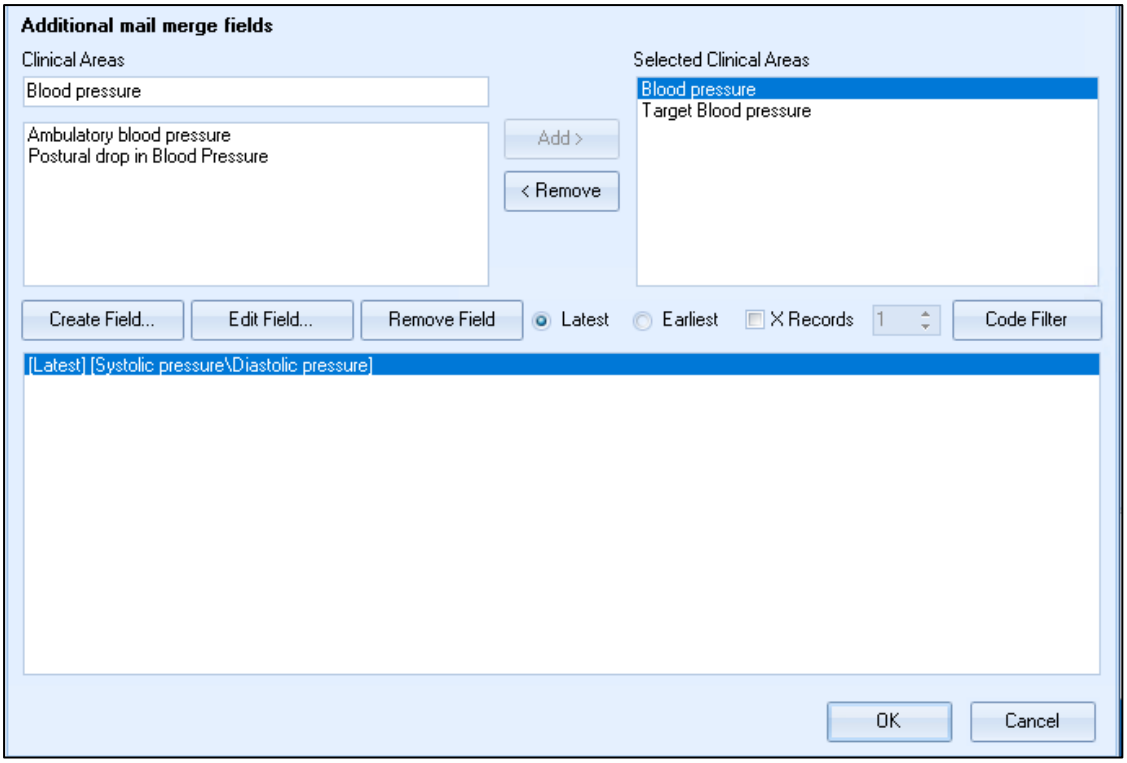


8. Click on the **Code Filter** button if applicable to restrict the codes used for that Clinical area:



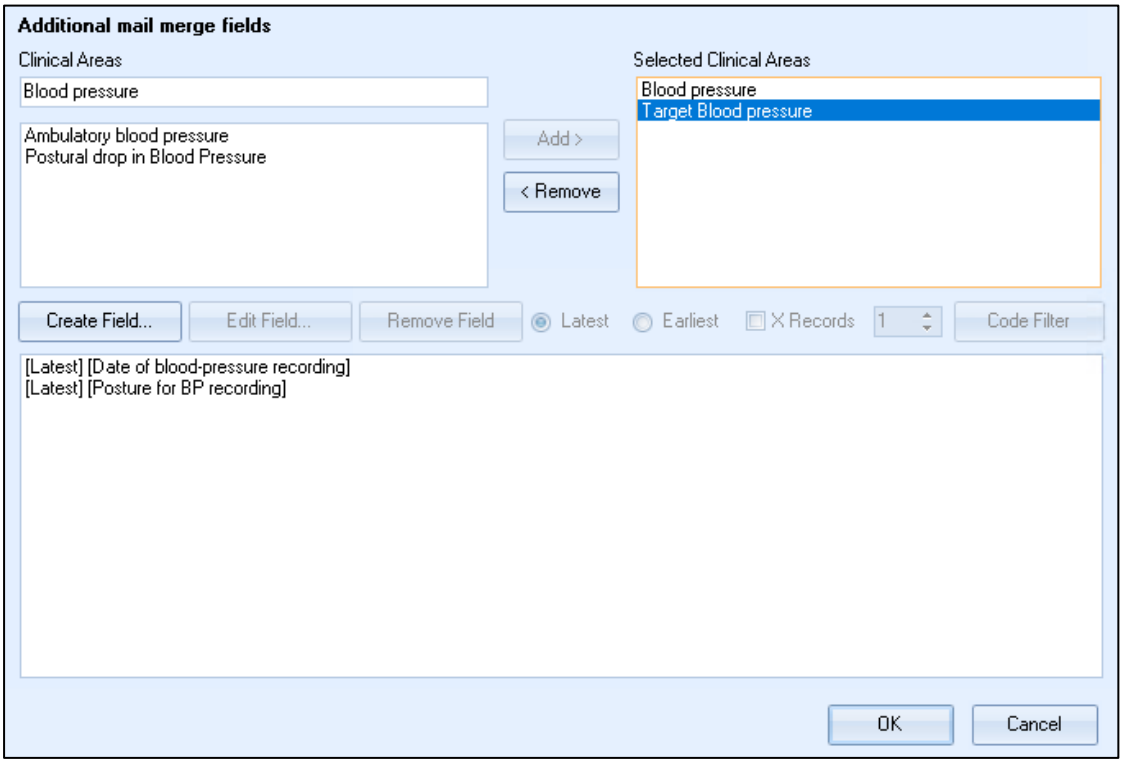
9. Select the codes as required and Click **OK** to return to the **Create Merge Field** Screen.

10. Click **OK** to view the details of created mail merge field in the Field Window.



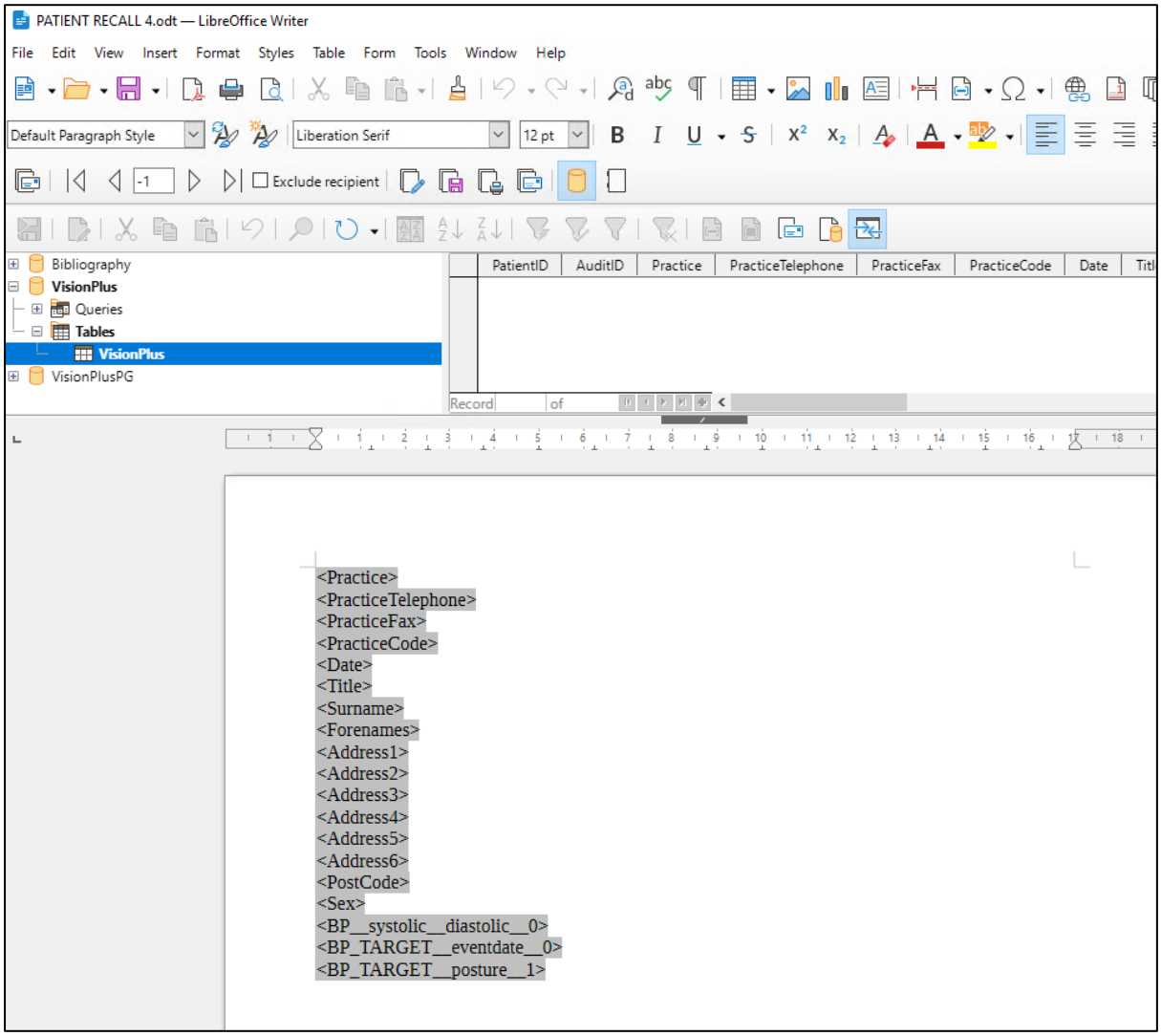
11. Repeat the **Create Field** steps for all selected Clinical Areas.

    Note: to view the Created mail merge fields for each selected Clinical Area, highlight the Clinical Area to toggle the view of the created fields.

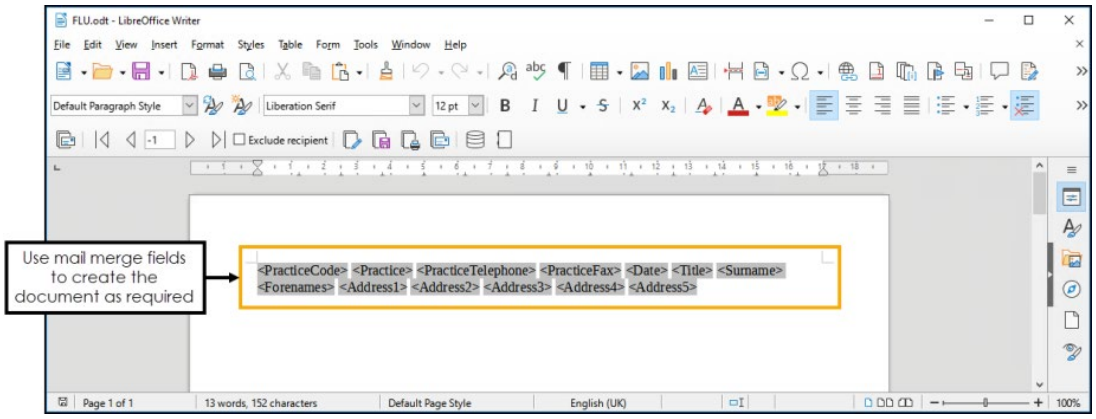


12. Select **OK** and the word processing application opens in a new window with a basic template layout.

Note: A small delay may occur if LibreOffice is opened for the first time for that day. A message will appear to advise of this.

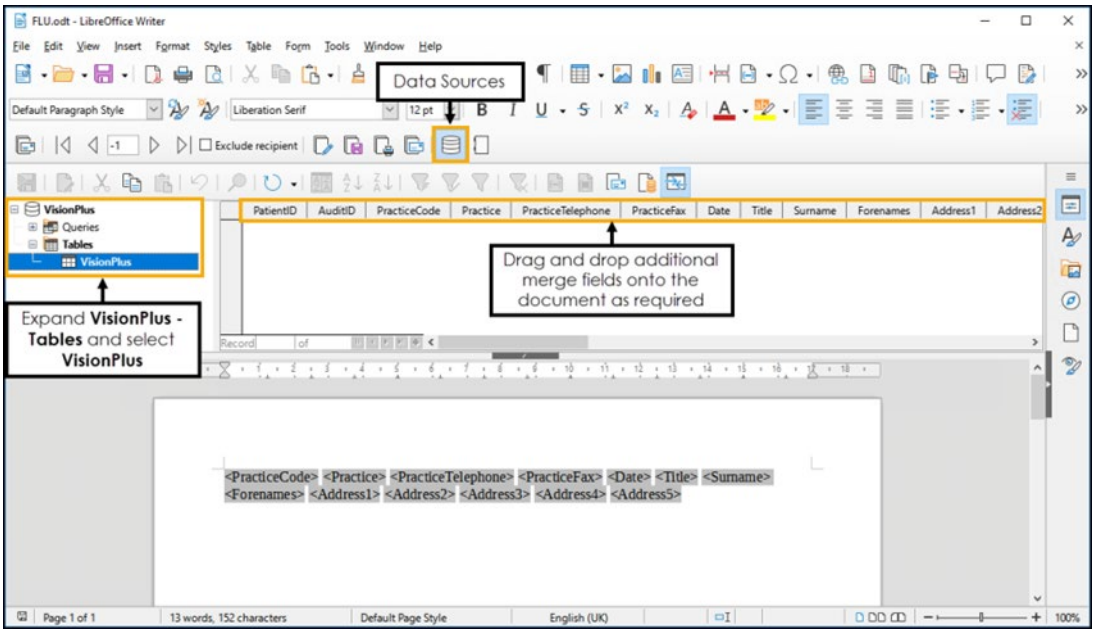


a. Use **LibreOffice** to make any changes to the template layout that you require. The mail merge fields selected display on the screen with a **< >** around them, you can move them around or copy them to other areas of the document as required.



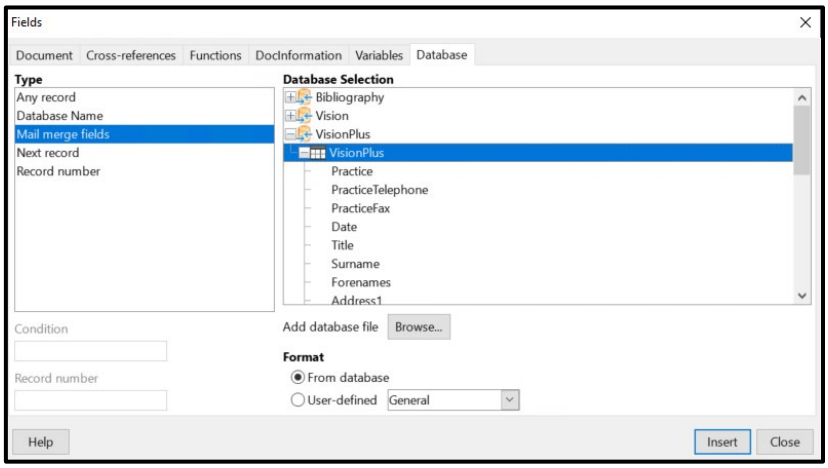
b. You can insert additional merge fields from within **LibreOffice** in two ways:

- From the side pane, select **VisionPlus** - **Tables** - **VisionPlus** and the merge fields display horizontally across the top pane.



Drag and drop the merge field onto the document.

- Select **Insert** - **Field** - **More Fields** to open the **Fields** screen. From the **Database** tab under **Type** choose **Mail merge fields**. Expand **VisionPlus** under **Database Selection** to view the available merge fields



Select in the document where you'd like to insert the merge field then, from the **Fields** screen, double click on the required mail merge field or highlight the required mail merge field and select **Insert**.

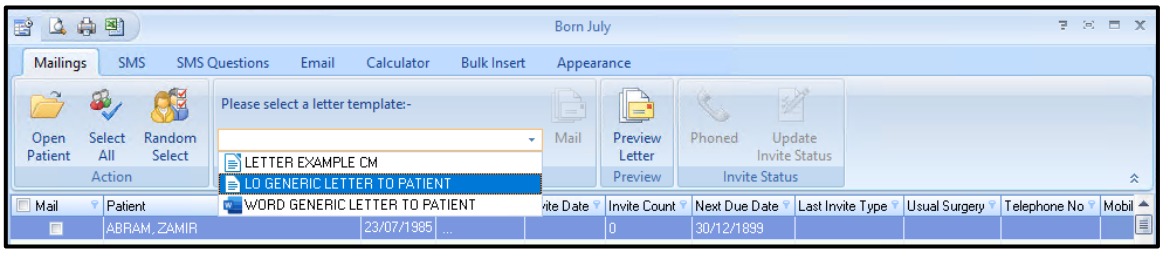
c. You can use all the familiar word processing features in **LibreOffice** to make the layout of the letter more attractive.

d. Select **Save** and **Close**

You should now see the new letter template displayed in the list on the **Letter Templates** screen.

Practice Reports - Selecting Letter Templates

When selecting letter templates from the **Mailings** screen you can now view which word processing application the template was created in:



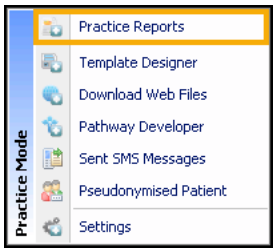
- - Letter templates created in **Microsoft Word**

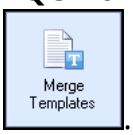
- - Letter templates created in **LibreOffice**
- - Letter templates created in **Docmail**

Training Tip – Following the switch to **LibreOffice** and the re-creation of your Letter templates, delete any **Microsoft Word** letter templates no longer required. See Edit or Delete Letter/SMS Templates for more information.

Editing LibreOffice Templates

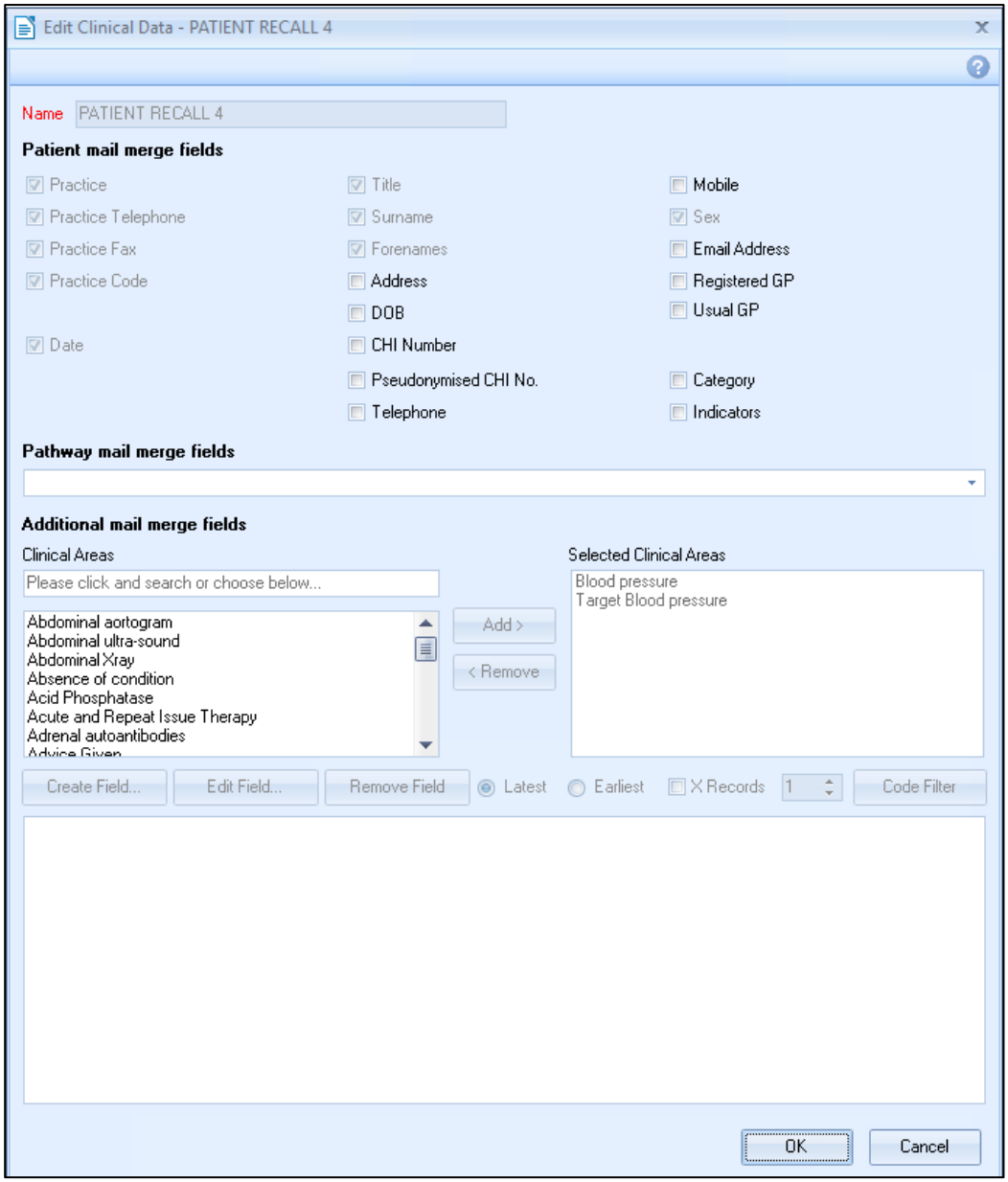
1. From the **Windows Notification Area**, right-click **Vision+** and select **Practice Reports**.



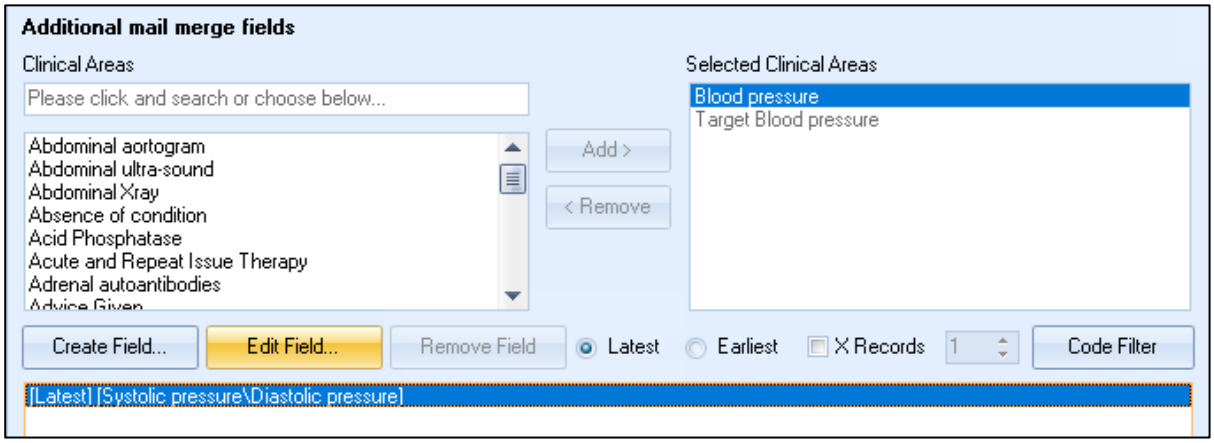
2. Select either **QOF** or **Practice Lists** as required and then select **Merge Templates** 

.
3. Select the template to edit.
4. From the **Merge Templates** toolbar, select **Edit**

.
5. **The Edit Clinical Data** Screen opens showing the Clinical Areas that were used to create the mail merge letter:



6. From here you can edit previously selected Clinical Areas by highlighting the area and click **Edit** field.



Note: Clinical Areas that were previously saved cannot be removed using this screen. You will need to **manually** delete them from the LibreOffice document.

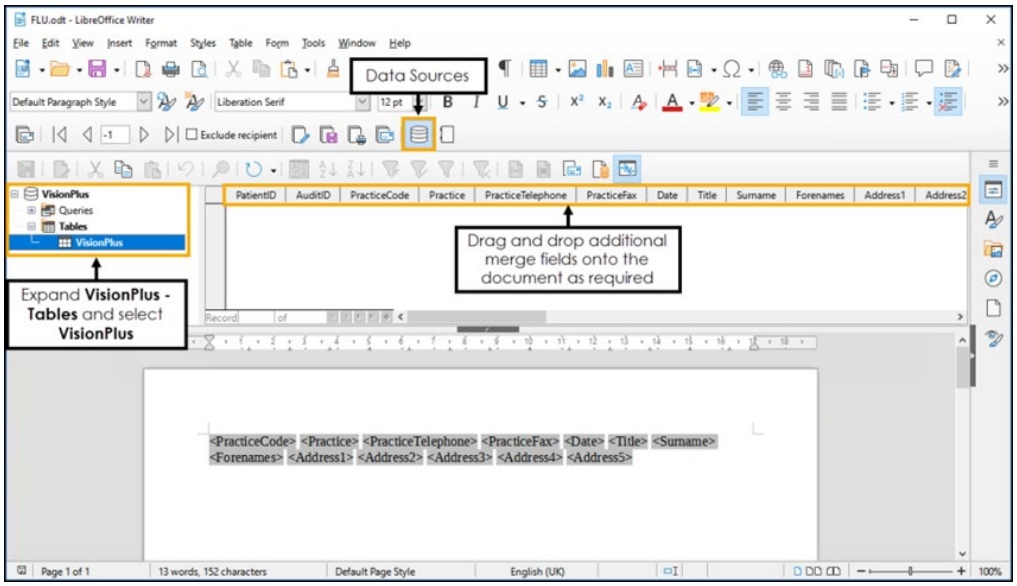
While in edit mode, if you create new mail merge fields in this screen, they will need to be inserted into the document as additional fields merge from the **LibreOffice Writer** screen after you click **OK.** See below.

7. After clicking, **OK LibreOffice** opens the selected template.

8. Use **LibreOffice** to make any changes to the template layout that you require.

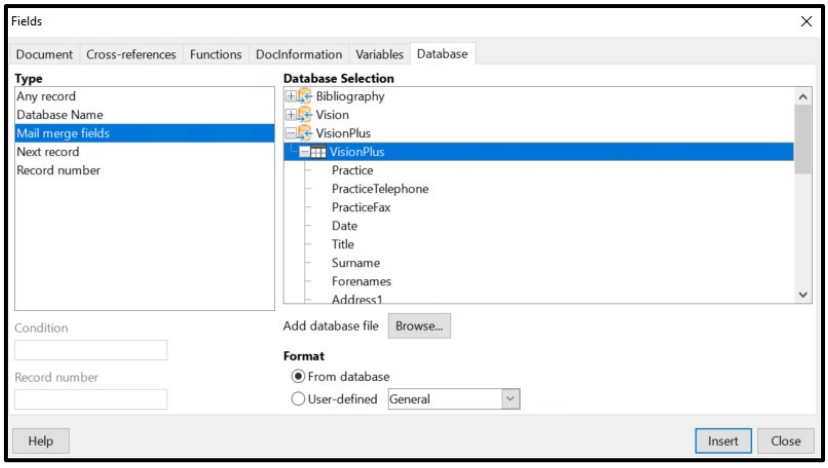
   You can insert additional merge fields from within **LibreOffice** in two ways:

   - From the side pane, select **VisionPlus** - **Tables** - **VisionPlus** and the merge fields display horizontally across the top pane. These will include any new fields yiou have created in the above steps while in **edit** mode.



   Drag and drop the merge field onto the document.

   - Select **Insert** - **Field** - **More Fields** to open the **Fields** screen. From the **Database** tab under **Type** choose **Mail merge fields**. Expand **VisionPlus** under **Database Selection** to view the available merge fields



Select in the document where you'd like to insert the merge field then, from the **Fields** screen, double click on the required mail merge field or highlight the required mail merge field and select **Insert**.

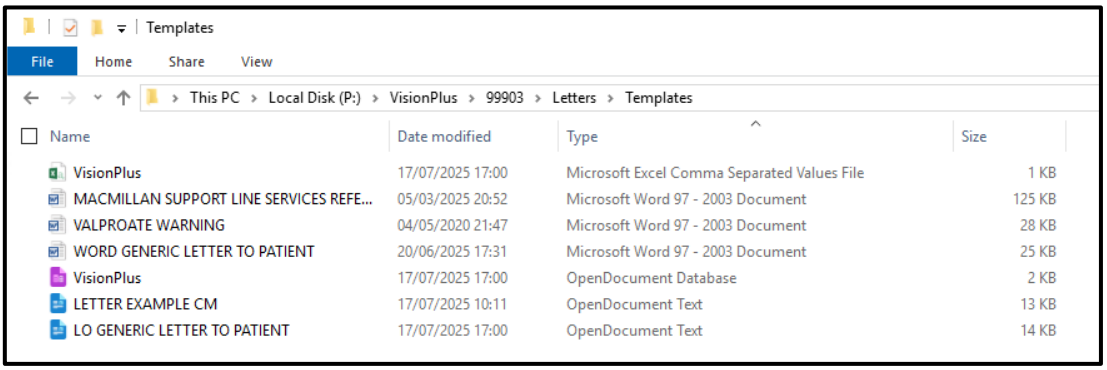
8. You can use all the familiar word processing features in **LibreOffice** to make the layout of the letter more attractive.

9. Select **Save** and **Close**

Re-creating Microsoft Word Templates in LibreOffice

To re-create an existing **Microsoft Word** template as a **LibreOffice** template, you need to copy your existing **Microsoft Word** template content to a **LibreOffice** template and update the merge fields as per the instructions below. There is no automatic conversion process, but this may be a useful opportunity to consolidate your template set:

1. From File Explorer, locate the **Microsoft Word** template from **P:\VisionPlus\[Practice Code]\Letters\Templates**.

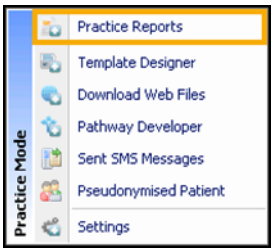


2. Right click on the template file and select **Open with LibreOffice Writer** to open the template file in **LibreOffice**.

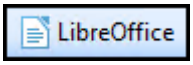
3. Highlight the contents of the template and copy (**Ctrl** + **C** on your keyboard)

4. **Close** the **LibreOffice** document and if prompted, do not save changes at this stage.

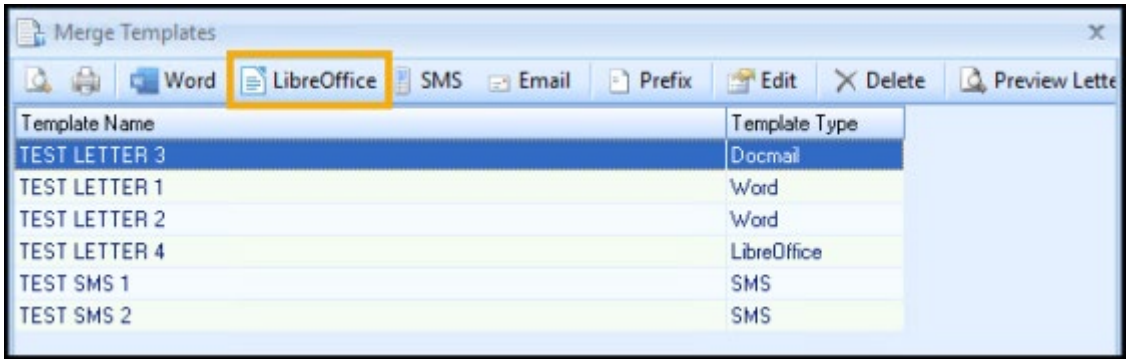
5. From the **Windows Notification Area**, right-click **Vision+** and select **Practice Reports**.



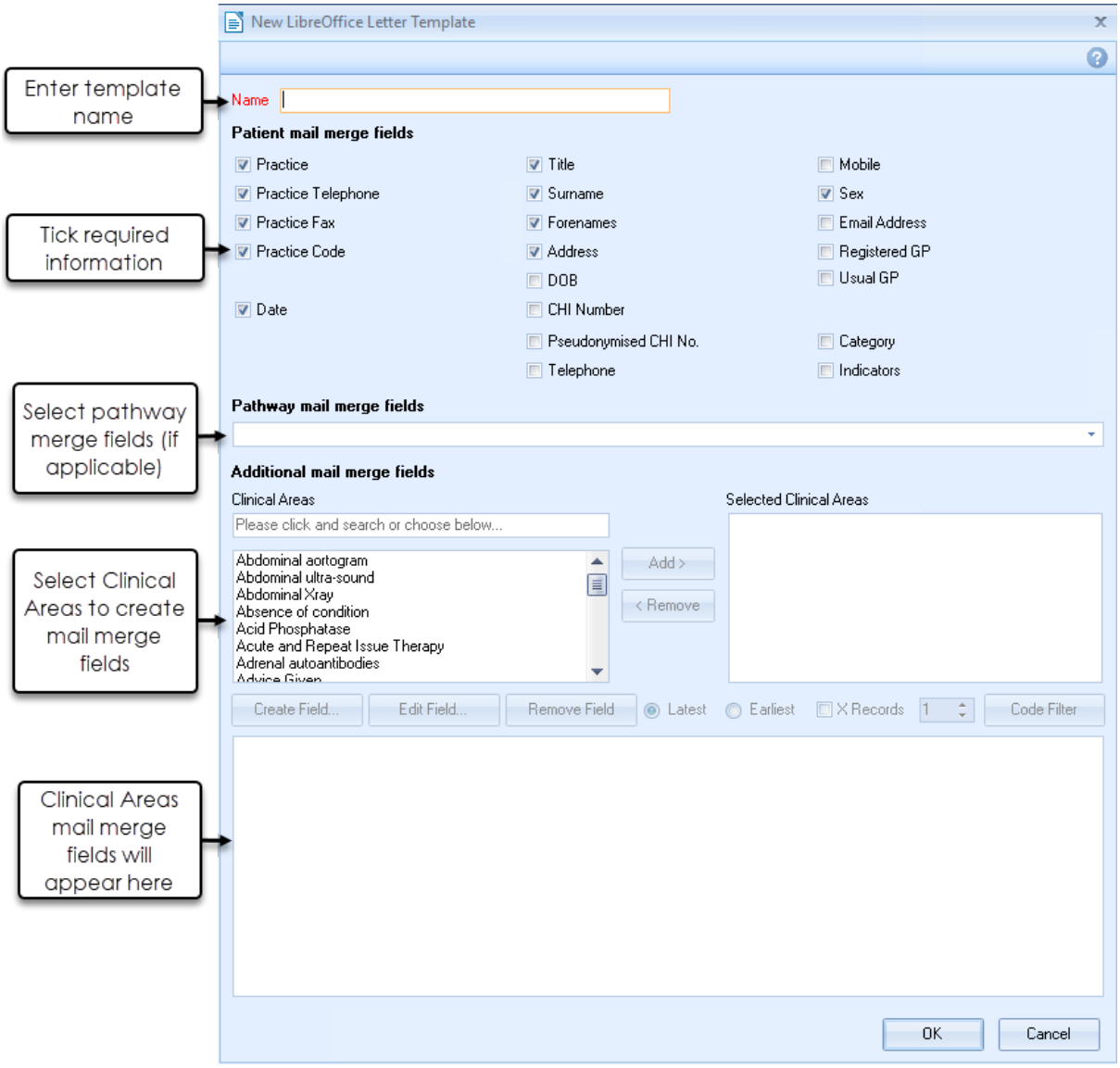
6. Select either **QOF** or **Practice Lists** as required and then select **Merge Templates**.

7. From the **Merge Templates** toolbar, select **LibreOffice** 

.



The **New Letter Template** screen displays, complete the following:



- **Name** - Enter a descriptive title for the new template.

Note - The system does not let you have the same file name for **Word** and **LibreOffice** templates in **Vision+**.

- **Patient Information** - Tick against each item of information from the patients records that you would like to merge into the letter, or untick any items you do not require.

Note - For Practices in Scotland the **NHS Number** merge field is replaced with **CHI Number** and for practices in Northern Ireland **H+C Number** is shown.

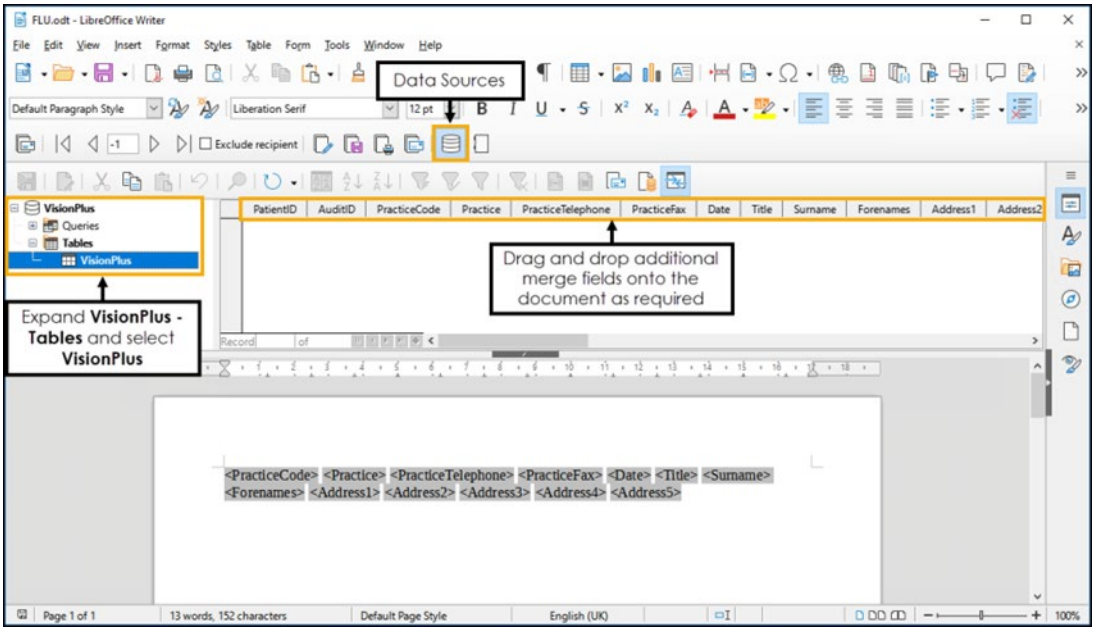
- **Patient mail merge fields Information -** Tick against each item of information from the patients records that you would like to merge into the letter or untick any items you do not require.
- **Clinical Areas –** Either type in the search box or choose Clinical Areas from the list to add to your Mail merge template. Each Clinical Area has its own predefined fields which you can configure using the Steps listed at Creating additional mail merge fields using Clinical Areas

9. Select **OK** and **LibreOffice** opens in a new window with a basic template layout.
10. Paste (**Ctrl** + **V** on your keyboard) the copied content into the new **LibreOffice** template.
11. Replace all **Microsoft Word** merge fields with merge fields from **LibreOffice**. To do this you will need to delete the **Microsoft Word** merge fields and insert the merge fields available in **LibreOffice**.

Training Tip - Merge fields in **Microsoft Word** display with a double chevron and underscores. Merge fields in **LibreOffice** display with a single chevron and spaces (no underscores).

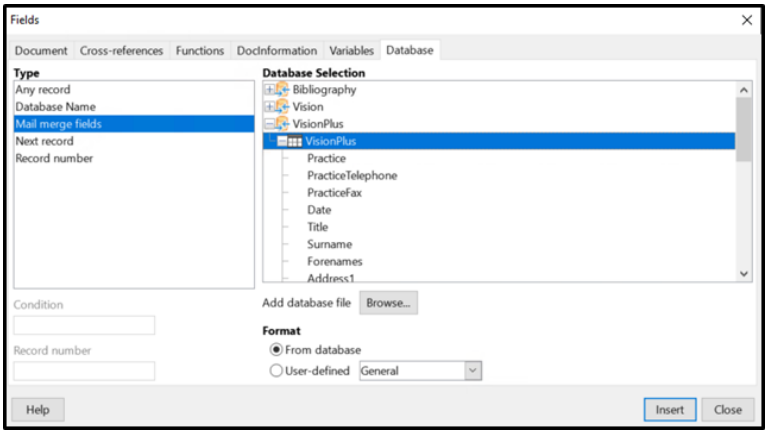
You can insert merge fields in **LibreOffice** in two ways:

- From the side pane, select **VisionPlus** - **Tables** - **VisionPlus** and the merge fields display horizontally across the top pane.



Drag and drop the merge field onto the document.

- Select **Insert** - **Field** - **More Fields** to open the **Fields** screen. From the **Database** tab under **Type** choose **Mail merge fields**. Expand **VisionPlus** under **Database Selection** to view the available merge fields



Select in the document where you'd like to insert the merge field then, from the **Fields** screen, double click on the required mail merge field or highlight the required mail merge field and select **Insert**.

12. Ensure all **Microsoft Word** merge fields are replaced.
13. Use **LibreOffice** to make any changes to the template as required.
14. Select **Save** and **Close**

The **LibreOffice** template is now ready to use in **Vision+**.

Training Tip – Replace any **Microsoft Word** templates attached to **Practice Lists** reports with the new **LibreOffice** template. See Attaching a Letter to a Practice List for more information.

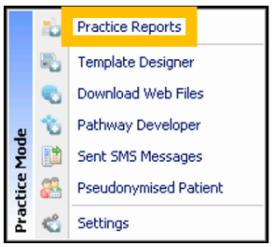
Local LibreOffice Calc Extracts

Vision+ now supports the generation of **LibreOffice Calc** extract reports. These replace the **Microsoft Excel Specialist Reports** used to extract data from the **Vision 3** Database and present it in Excel. The Reports are distributed using the same mechanism as Vision + templates through the **Download Web files** Screen.

The list of extracts that are planned for release are:

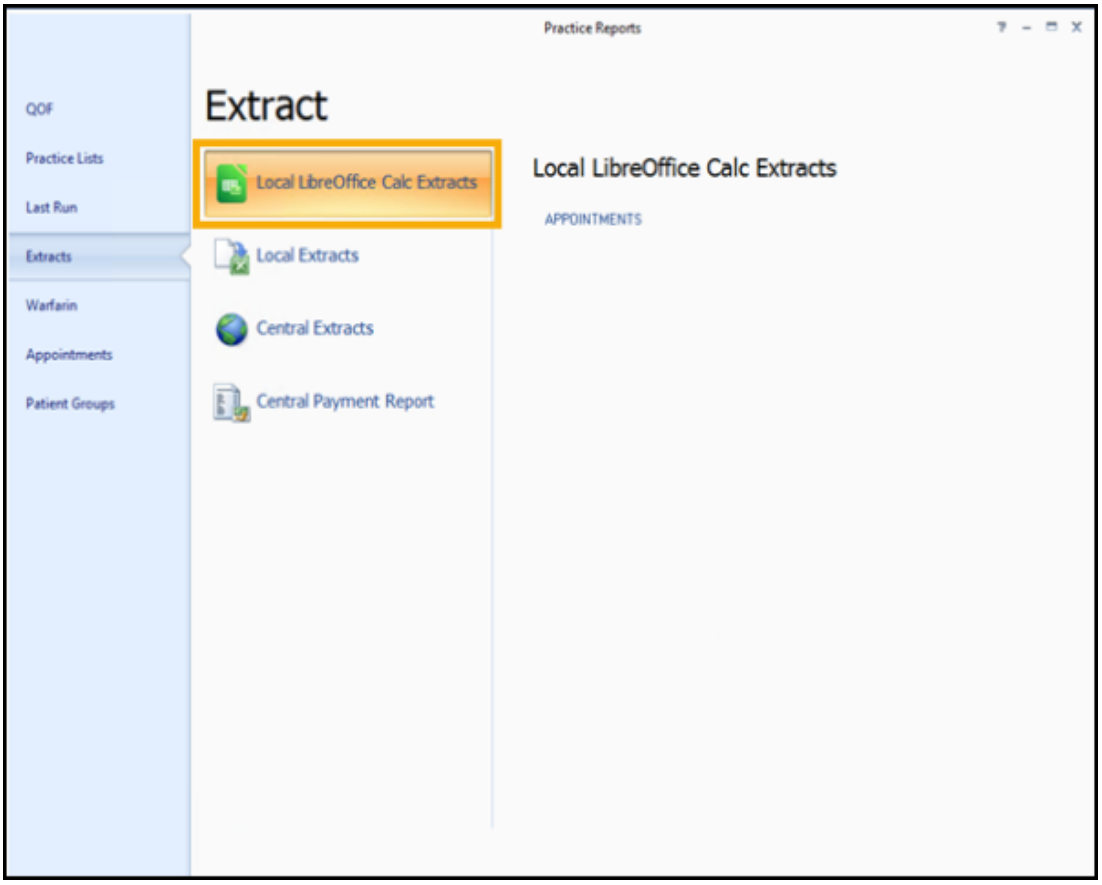
- Appointment Wizard
- Appointment Wizard Shared Care
- Patient Warnings Wizard
- Patient Yellow Reminders
- Clinical Code Analysis
- Prescribing Review
- Head of Household
- Daybook Tasks Report
- Daybook to Tasks Migration Checklist Report
- Patient Facing Services Registration
- Practice Online Analysis
- VOS Report
- Mail Manager Wizard
- Staff Report
- Vision 3 Recall Wizard
- Patient Record Report

1. From the **Windows Notification Area**, right-click **Vision+** and select **Practice Reports**.



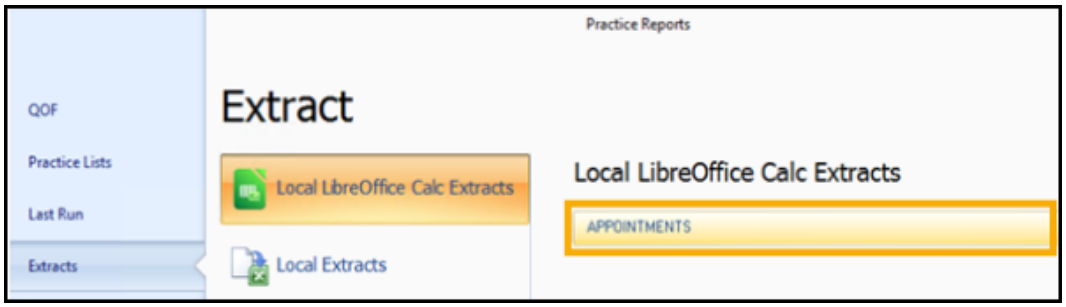
Training Tip - To access the **Vision+ Practice Reports**, you must not have a patient selected in **Consultation Manager** or the patient-specific menu displays.

2. The **Practice Reports** module opens, select **Extracts** from the menu options on the left-hand side.

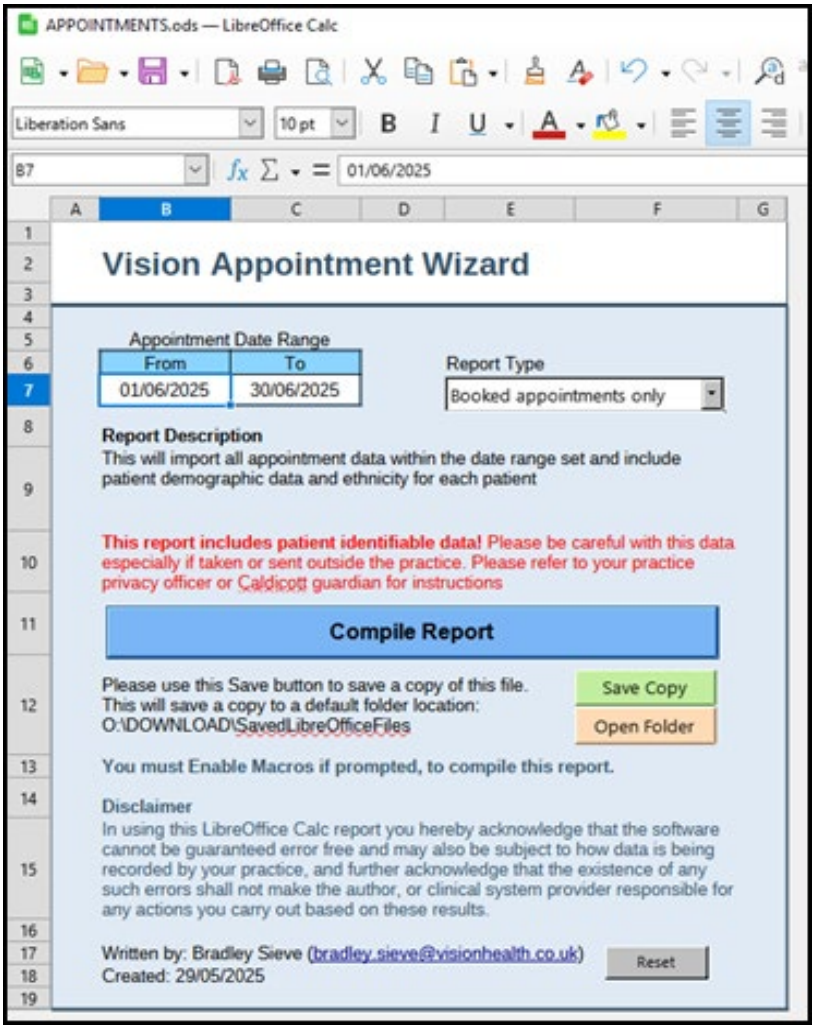


3. **Local LibreOffice Calc Extracts** is selected by default and downloaded extract reports display in the right-hand pane.

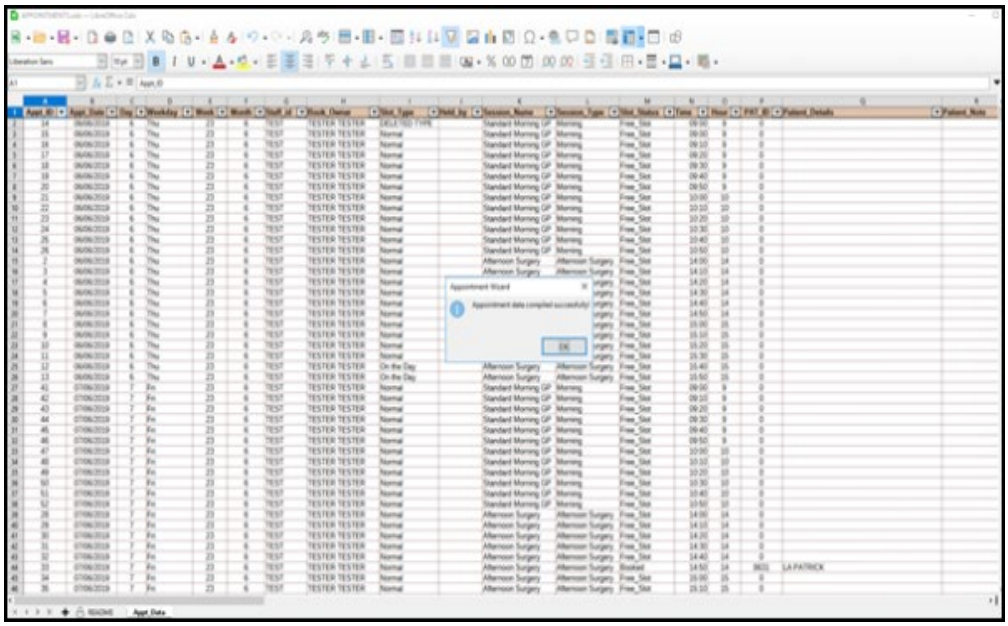
4. Choose the report you wish to extract.



5. The **LibreOffice Calc** extract report opens, follow the instructions within the report to generate the extract.


APPOINTMENTS.ods — LibreOffice Calc
Liberation Sans
10 pt
B7
01/06/2025
Vision Appointment Wizard
Appointment Date Range
From
To
01/06/2025
30/06/2025
Report Type
Booked appointments only
Report Description
This will import all appointment data within the date range set and include patient demographic data and ethnicity for each patient
This report includes patient identifiable data! Please be careful with this data especially if taken or sent outside the practice. Please refer to your practice privacy officer or Caldicott guardian for instructions
Compile Report
Please use this Save button to save a copy of this file.
This will save a copy to a default folder location:
O:\DOWNLOAD\SavedLibreOfficeFiles
Save Copy
Open Folder
You must Enable Macros if prompted, to compile this report.
Disclaimer
In using this LibreOffice Calc report you hereby acknowledge that the software cannot be guaranteed error free and may also be subject to how data is being recorded by your practice, and further acknowledge that the existence of any such errors shall not make the author, or clinical system provider responsible for any actions you carry out based on these results.
Written by: Bradley Sieve (bradley.sieve@visionhealth.co.uk)
Created: 29/05/2025
Reset

6. On completion, any returned results display.



Important – To save a copy of the returned results, select the **README** worksheet and choose **Save Copy**. Selecting **Save** when closing the report does not save the returned results.

LibreOffice Correspondence

Vision+ now supports the generation of patient documents, for example Insurance reports.

To generate a **LibreOffice Writer** document:

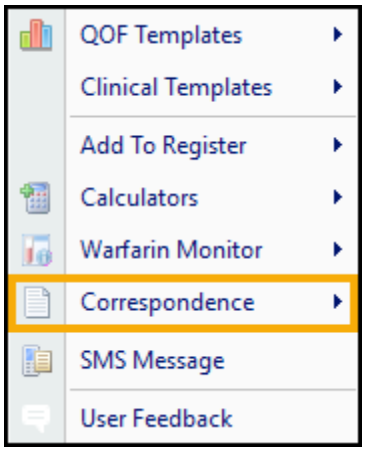
1. Open the patient record in **Consultation Manager**.
2. To access the **Vision+ Practice Mode** menu, either

   - Select the down arrow of the **Vision+** floating toolbar

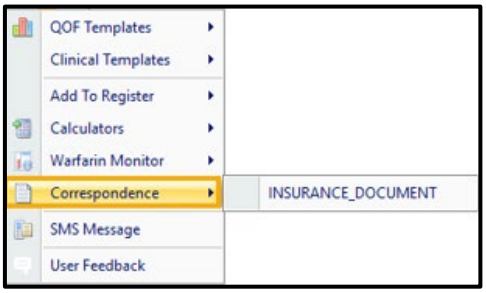
     or

   - Right click on the **Vision+ icon** in the Windows Notification Tray

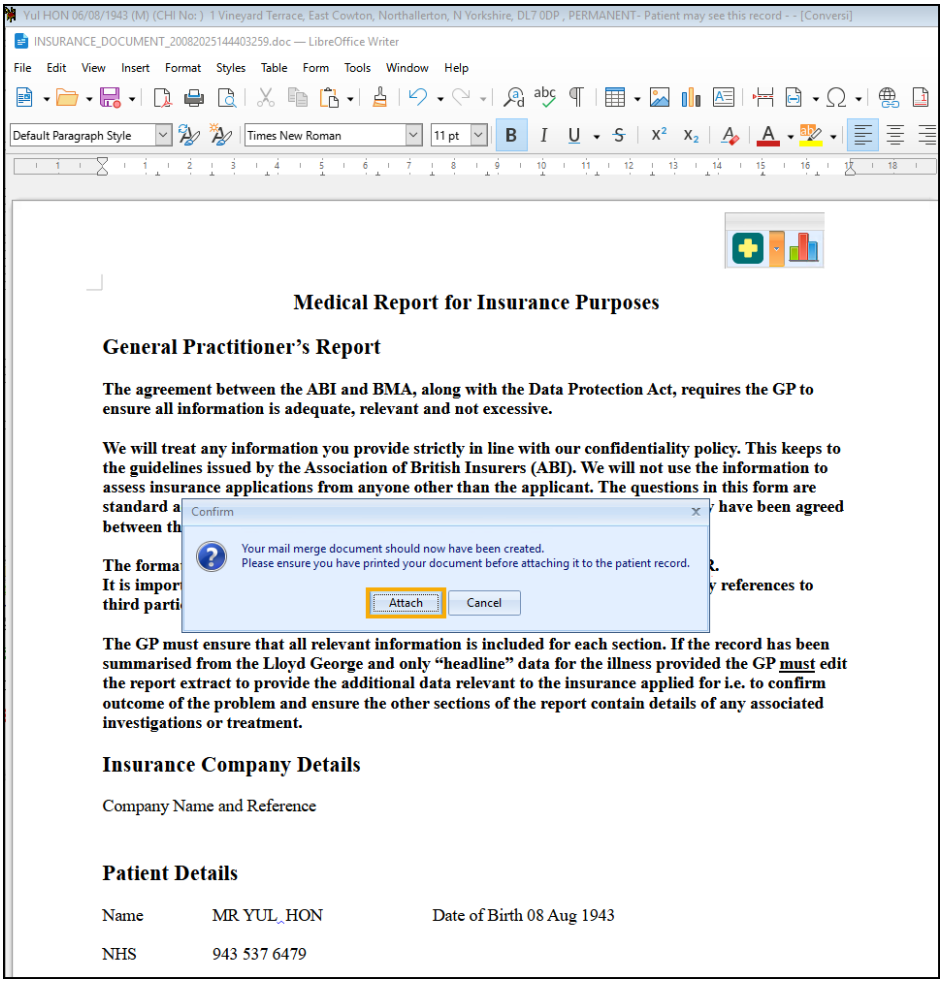
3. Select **Correspondence**



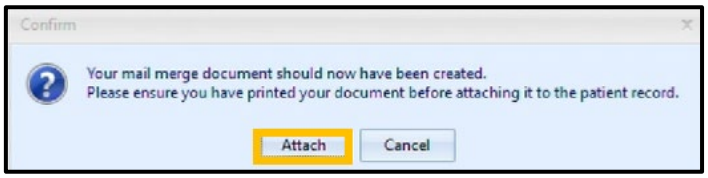
4. The list of available **LibreOffice Writer** documents displays, select the relevant document.



5. The merged patient document opens in **LibreOffice**, print if required.



6. A confirmation message displays. To attach the Document into the patient's record, select **Attach**.

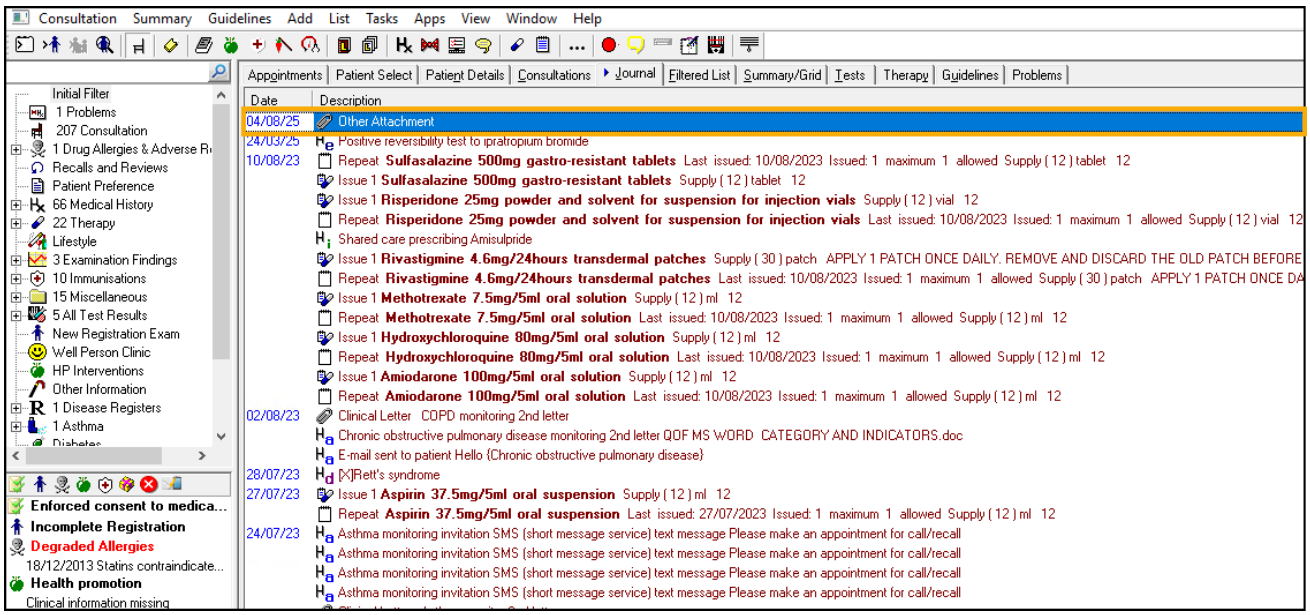


If you need to edit the Document:

- **Move** the **confirmation message** box away from the area you want to amend.
- Make the necessary changes.
- **Print** the **Document**.
- Select **Attach** to save it into the patient's record.

Important – Selecting **Cancel** does not attach the document into the patient's record automatically.

7. A copy of the document is added to the patient record. From the attachment you can then email or print accordingly.



- The **LibreOffice** Insurance Report displays in the patient's record.

- For a description and a list of the merge fields for the Insurance Report, see the Medical Insurance Report Table in the **Available Merge Fields – Vision 3** section

Available Merge Fields – Vision 3

Practice

Microsoft Word Displays as <<SYSTEM_Date>>	LibreOffice Displays as <SYSTEM Date>	Notes
SYSTEM_Date	SYSTEM Date	Today's date is inserted
PRACTICE_Name	PRACTICE Name	
PRACTICE_House	PRACTICE House	
PRACTICE_Road	PRACTICE Road	
PRACTICE_Locality	PRACTICE Locality	
PRACTICE_Town	PRACTICE Town	
PRACTICE_County	PRACTICE County	
PRACTICE_Postcode	PRACTICE Postcode	
PRACTICE_BlockAddress	PRACTICE BlockAddress	All the lines of the practice address: House name, Number and Road, Locality, Town, County, Postcode
PRACTICE_Main_Comm_No	PRACTICE Main Comm No	The practice's main phone number under Main Address in **Practice Details** - **File Maintenance** - **Control Panel**
PRACTICE_Fax_No	PRACTICE Fax No	

Patient

Microsoft Word Displays as <<PATIENT_Title>>	LibreOffice Displays as <PATIENT Title>	Notes
PATIENT_Title	PATIENT Title	

PATIENT_Forename1	PATIENT Forename1	
PATIENT_Forename2	PATIENT Forename2	If entered in **Registration**.
PATIENT_Surname	PATIENT Surname	
PATIENT_Sex	PATIENT Sex	
PATIENT_Date_of_Birth	PATIENT Date of Birth	
PATIENT_Current_NHS_Number	PATIENT Current NHS Number	The patient's current NHS number.
PATIENT_New_Format_NHS_Number	PATIENT New Format NHS Number	The new format NHS number; often the same as the **Current NHS number**.
PATIENT_Old_Format_NHS_Number	PATIENT Old Format NHS Number	If entered on **Registration**.
PATIENT_CHI_Number	PATIENT CHI Number	
PATIENT_Registered_GP	PATIENT Registered GP	
PATIENT_Reg_GP_GMP_Code	PATIENT Reg GP GMP Code	
PATIENT_Reg_GP_PPA_Code	PATIENT Reg GP PPA Code	
PATIENT_Usual_GP	PATIENT Usual GP	The GP that the patient usually sees, may differ from registered GP; must be entered in **Usual GP** in **Registration**.
PATIENT_Additional_ID	PATIENT Additional ID	Allocated to patients during data conversion to **Vision 3** or practice defined.

PATIENT_Previous_Surname	PATIENT Previous Surname	If entered in **Registration**.
PATIENT_NHS_Number_No_Spaces	PATIENT NHS Number No Spaces	The patient's NHS number without spaces.
PATIENT_Age	PATIENT Age	
PATIENT_House	PATIENT House	
PATIENT_Road	PATIENT Road	
PATIENT_Locality	PATIENT Locality	
PATIENT_Town	PATIENT Town	
PATIENT_County	PATIENT County	
PATIENT_Postcode	PATIENT Postcode	
PATIENT_BlockAddress	PATIENT BlockAddress	All the lines of the practice address: House name, Number and Road, Locality, Town, County, Postcode.
PATIENT_Main_Comm_No	PATIENT Main Comm No	The phone number at the patient's main address, recorded with the type of contact - **Telephone home**.
PATIENT_Alt_Comm_No	PATIENT Alt Comm No	The patients work number, recorded with the type of contact - Telephone - business. This must be added to the contacts for patient, on the **Address** tab in **Registration**.
PATIENT_Mobile_No	PATIENT Mobile No	

PATIENT_Height	PATIENT Height	The last height record.
PATIENT_Weight	PATIENT Weight	The last weight record.
PATIENT_BMI	PATIENT BMI	The last BMI calculation - BMI Read codes are not included.
PATIENT_BP	PATIENT BP	The last blood pressure record.
PATIENT_Smoking	PATIENT Smoking	The last smoking status record into the template letter.
PATIENT_Alcohol	PATIENT Alcohol	The last alcohol record into the template letter.
PATIENT_LMP	PATIENT LMP	The LMP must be entered into the LMP SDA for this to populate.
PATIENT_EDD	PATIENT EDD	The EDD must be entered in the EDD SDA for this to populate.
PATIENT_Pregnant	PATIENT Pregnant	This inserts a Y (Yes) when a Maternity Plan is added using the Maternity SDA.
PATIENT_Total_Cholesterol	PATIENT Total Cholesterol	The last total cholesterol record is added from the Cholesterol SDA.
PATIENT_HDL	PATIENT HDL	The last HDL record is added.
PATIENT_LDL	PATIENT LDL	The last LDL is added.

PATIENT_Triglycerides	PATIENT Triglycerides	The last Triglyceride result is added.

Recall

Microsoft Word Displays as <<RECALL_Date>>	LibreOffice Displays as <RECALL Date>	Notes
RECALL_Date	RECALL Date	
RECALL_Reason	RECALL Reason	The Read description entered on the **Recall** - **Add** screen.
RECALL_Clinician	RECALL Clinician	The GP creating the recall.
RECALL_Recalling_GP_GMP_Code	RECALL Recalling GP GMP Code	The GMP code of the GP making the recall.
RECALL_Reg_GP_GMP_Code	RECALL Reg GP GMP Code	The GMP code of the registered GP with whom the recall patient is registered.
REPEATS	REPEATS	The patient's repeat masters.
DRUG_ALLERGY	DRUG ALLERGY	The patient's drug allergies.
MEDICAL_HISTORY	MEDICAL HISTORY	The patient's medical history by priority set up in **Options for Repeats, Allergies, Histories and Problems Merge Fields**.
PROBLEMS	PROBLEMS	The patient's active problems.
CURRENT_CONSULTATION	CURRENT CONSULTATION	Data in the current open consultation.

Referral

Microsoft Word Displays as <<REFERRAL_Event_Date>>	LibreOffice Displays as <REFERRAL Event Date>	Notes
REFERRAL_Event_Date	REFERRAL Event Date	The date on **Referral Add**.
REFERRAL_Clinician	REFERRAL Clinician	The GP making the referral.
REFERRAL_Read_Term	REFERRAL Read Term	The Read description on **Referral Add**.
REFERRAL_Consultant	REFERRAL Consultant	The consultation at the hospital or provider to which the referral is made.
REFERRAL_Consultant_title	REFERRAL Consultant title	
REFERRAL_Consultant_forename	REFERRAL Consultant forename	
REFERRAL_Consultant_surname	REFERRAL Consultant surname	
REFERRAL_Department	REFERRAL Department	The department at the provider, if entered in **File Maintenance** - **Organisations**.
REFERRAL_Provider	REFERRAL Provider	The hospital or provider to which the referral is made.
REFERRAL_House	REFERRAL House	
REFERRAL_Road	REFERRAL Road	
REFERRAL_Locality	REFERRAL Locality	
REFERRAL_Town	REFERRAL Town	
REFERRAL_County	REFERRAL County	

REFERRAL_Postcode	REFERRAL Postcode	
REFERRAL_BlockAddress	REFERRAL BlockAddress	The house, road, locality, town, county and postcode of the provider.
REFERRAL_Action_Date	REFERRAL Action Date	By default, this is 21 days from the event date on **Referral Add**.
REFERRAL_Urgency	REFERRAL Urgency	If selected on **Referral Add**.
REFERRAL_Organisation_code	REFERRAL Organisation code	If entered in **Control Panel** - **File Maintenance** - **Organisations**.
REFERRAL_Hospital_number	REFERRAL Hospital number	The patient's hospital number, entered in **Registration** - **Identifiers**.
REFERRAL_NHS_speciality	REFERRAL NHS speciality	
REFERRAL_Referring_GP_GMP_code	REFERRAL Referring GP GMP code	The GMP code of the referring GP.
REFERRAL_Referring_GP_PPA_code	REFERRAL Referring GP PPA code	The PPA code of the referring GP.
REFERRAL_Reg_GP_GMP_code	REFERRAL Reg GP GMP code	The GMP code of the patient's registered GP.
REFERRAL_UBRN	REFERRAL UBRN	The unique booking number used by eReferral referrals.
REPEATS	REPEATS	The patient's repeat masters.
DRUG_ALLERGY	DRUG ALLERGY	The patient's drug allergies.

MEDICAL_HISTORY	MEDICAL HISTORY	The patient's medical histories; the priorities displayed are selected globally in **Options for Repeats, Allergies, Histories and Problems Merge Fields**.
PROBLEMS	PROBLEMS	Any active problems.
CURRENT_CONSULTATION	CURRENT CONSULTATION	Data in the current open consultation for the patient.

Medical Insurance Report

A GP medical insurance report is a document provided by a General Practitioner (GP) that includes medical information relevant to an individual's insurance needs. Insurance companies often request these reports to assess the risk of an individual and determine the appropriate level of insurance coverage.

The document automatically extracts data from your patient records to produce a report that can then be edited.

The table below lists the mail merge fields that are generated and the content that is outputted to the Insurance report document when the user generates it.

Insurance report Content	Notes
Top of the page practice address	House name, house number, road name, locality, town, county, postcode and telephone number.
Insurance Company Name	Comments selected from the patient's record with a Read Code **9E45**.
Patient Details	Uses CHI number if populated if not use new NHS number. If both are empty, then use old NHS number. Gets name in the format title, forename1, forename2 and DOB.

	Gets date of registration date and patient's main address using House name, house number, road name, locality, town, county, postcode and telephone number. Get general information from the patient's record with a Read Code **9E45**.
Consultations	Get all consultations for a patient output event date, category, and clinician and for each consultation list out the relevant information.
Blood pressure	Output Blood Pressure label and systolic/diastolic.
Medical History	Output History label and Read Term if category is not SED006 (Administration) and Priority > 0 and Read Code isn't 9N32%, 43C%, 43X4%, 43B3%, 43B7%, and 14OP%
Smoking	Output Smoking label and one of the following depending on smoking status. Never smoked label. Smoker label and cigarettes per day, cigars per day and ounces per day. Ex-Smoker label, cigarettes per day, cigars per day and ounces per day.
Alcohol	Output Alcohol label and one of the following depending on alcohol status. Lifelong Teetotaller label and read term. Current drinker label, units per week and read term. Ex-drinker label, units per week and read term

Weight	Output Weight label weight in kgs, BMI if weight is > 0 else output centile.
Height	Output Height label, height in meters if height > 0 else output centile.
Tests	Output Test Result label, read term, text, result and qualifier if Read Code not like 43B3% and 43B7% and 14OP% and 14OZ% and entity type is 120, 122, 123, 130, 132, 140, 141, 143, 145, 150, 176, 179, 188, 195, 198, 261, 262, 263, 265, 367, 450, 451, 453, 454, 455, 465, 475, 476, 479, 551, 562, 563, 565, 566, 569, 570, 571, 572, 594, 597, 601, 633, 641, 647 or 648
Medication	Output Medication label, drug term, quantity, pack size and dosage if BNF Code isn't 05%, 90%, 93%, 94%, 0311% and 80%.
Referrals	Output Referred for label, read term and organisation.
Immunisations	Output Immunisations label, read term and stage.
Recalls	Output Recalls label, read term and read term 2.
Letters	Output Letter label, event date, type and text.
Attachments	Output Attachment label, event date, media type and text.
Medication	**Repeats**

	Output last issued, drug name, quantity, pack size and dosage if issued in the last 3 months and BNF code isn't 05%, 90%, 93%, 94%, 0311% and 80% and not in 3rd party consultations.
Medication	**Acutes** Output issue date, drug name, quantity, pack size and dosage if issued in the last 3 months and BNF code isn't 05%, 90%, 93%, 94%, 0311% and 80% and not in 3rd party consultations.
Sickness	Output event date, read term and text if patient has anything of the following: If event date is in the last 3 years and read code is 9D1%, 9D2%, 9D3%, 9D4%, 9D5%, 9DC%, 9DG%, 9DF% or ZV680, read code is not in the **exclude codes** and not in 3rd party consultations. If med3 is in the last 3 years and not in 3rd party consultations. If emed3 is in the last 3 years and not in 3rd party consultations.
Active Problems	Output event date, read term and end date if active and read code not in the **exclude codes**. **Significant** Output event date, read term and text if priority is 1 or 2, read code isn't 9N32%, 43C%, 43X4%, 43B3%, 43B7%, 14OP% and 14OZ%, category isn't SED006,(Administration) read code not in the exclude codes and not in 3rd party consultations.
Other History	Output event date, read term and text if event data in the last year, priority > 2, read code isn't 9N32%, 43C%, 43X4%,

	43B3%, 43B7%, 14OP% and 14OZ%, read code not in the **exclude codes** and not in 3rd party consultations.
Referrals	Output event date, read term and organisation if read code not in the **exclude codes** and not in 3rd party consultations.
Treatment	Output issue date, drug term, quantity, pack size and dosage if BNF Code isn't 05%, 90%, 93%, 94%, 0311% and 80%, issue date between the last 3 and 24 months and not in third party consultations.
Tests	**Height** Output event date, height in meters if event date is in the last 24 months and not in 3rd party consultations. **Weight** Output event date, weight in kgs and BMI if event date is in the last 24 months and not in 3rd party consultations. **Alcohol** Output event date and one of the following depending on alcohol status, event date recorded in the last 5 years and not in third party consultations. Lifelong Teetotaller label and read term. Current drinker label, units per week and read term. Ex-drinker label, units per week and read term. **Smoking** Output event date and one of the following depending on smoking status, event date recorded in the last 5 years and not in third party consultations. Never smoked label. Smoker label and cigarettes per day, cigars per day and ounces per day.

Ex-Smoker label, cigarettes per day, cigars per day and ounces per day.

Smear

Output event date, read term and recall date if patient is female, aged over 20, smear is adequate, recorded in the last 60 months and not in 3rd party consultations.

Output event date, read term if patient is female, aged over 20, recorded in generate history, read code is 7E01%, 7E00%, 7D1C2, 8H7N. or 9N1e, recorded in the last 60 months and not in third party consultations.

Lipids

Output Lipids label, read term, result, unit and qualifier if entity type is cholestero, hdl, ldl or triglyceri and not in 3rd party consultations.

Entity Type	Description
cholestero	Serum cholesterol
hdl	High Density Lipoprotein
ldl	Low Density Lipoprotein
triglyceri	Triglycerides

Blood glucose & HBA1c

Output Blood glucose & HBA 1c label, read term, result, unit and qualifier if entity type is bld_glucos, fast_gluco, hba1 or fructosami and not in third party consultations.

Entity Type	Description
bld_glucos	Blood glucose
fructosami	Fructosamine
fast_gluco	Fasting glucose
hba1	Hb A1C - Diabetic control

Liver Function Tests

Output Liver Function Tests label, read term, result, unit and qualifier if entity type is alk_phos, gamma_gt, ast or alt and not in third party consultations.

Entity Type	Description
alk_phos	Alkaline Phosphatase
alt	Alanine Aminotransferase
ast	Aspartate Aminotransferase
gamma_gt	Gamma Glutamyl Transpeptidase

Prostate Function

Output Prostate Function label, read term, result, unit and qualifier if entity type is pros_ant, patient is male and not in 3rd party consultations.

Entity Type	Description
pros_ant	Prostate specific antigen

Renal Function

Output Renal Function label, read term, result, unit and qualifier if entity type is renal_arte, creatinine, or urea and not in third party consultations.

Entity Type	Description
creatinine	Serum creatinine
urea	Urea - blood
renal_arte	Renal arteriography

Haematology

Output Haematology label, read term, result, unit and qualifier if entity type is esr, haemoglobi, mch, histology, sput_cyto, genetic_ob, other_labt or nerve_cond and not in third party consultations.

Entity Type	Description
haemoglobi	Haemoglobin
mch	Mean corpuscular haemoglobin
esr	Erythrocyte sedimentation rate

other_labt	Other Laboratory tests
histology	Histology
nerve_cond	Nerve Conduction Studies
sput_cyto	Sputum Cytology Test
genetic_ob	Genetic Observations

All Tests

Output event date, read term, result, unit and qualifier if the test event date was recorded in the last 5 years read code is not in the exclude codes and not in third party consultations.

Other Urine Tests

Output event date, read term, result, unit and qualifier if the urine test event date was recorded in the last 5 years read code is 46% or entity type is urine_gluc, dip_gluc, urine_prot, dip_prot and not in 3rd party consultations.

Entity Type	Description
urine_gluc	Urinalysis - Glucose
dip_gluc	Urine dipstick for glucose
urine_prot	Urinalysis - Protein
dip_prot	Urine dipstick for protein

Other Tests

Output Other label, read term, result, unit and qualifier if entity type is endoscopy, bronchosco, oesophagoc, duodenosco, colonoscop, sigmoidosc, pf_current, pf_lstbe, pf_lstaf, amb_bp, doppler_pp, echocardio, pf_current, pf_lstbe, pf_lstaf, lf_pre, lf_post, fev1, fvc, totallung, fev1_fvc, air_revers, spirometry, endoscopy, oesophagoc, duodenosco, colonoscop, sigmoidosc, bronchosco, nerve_cond or eeg and not in 3rd party consultations.

Entity Type	Description
endoscopy	Endoscopy
bronchosco	Bronchoscopy
oesophagoc	Oesophagoscopy

duodenosco	Duodenoscopy
colonoscop	Colonoscopy
sigmoidosc	Sigmoidoscopy
pf_current	Lung Func
pf_lstbe	Lung Func before bronchodilation
pf_lstaf	Lung Func after bronchodilation
amb_bp	Ambulatory blood pressure
doppler_pp	Doppler Ultrasound Peripheral Pulse
echocardio	Echocardiogram
nerve_cond	Nerve Conduction Studies
fev1	Forced Expiratory Volume in 1 sec
fev1_fvc	FEV1/FVC
fvc	Vital Capacity
totallung	Total Lung Capacity
air_revers	Airway Reversibility
eeg	Electroencephalography
spirometry	Spirometry
lf_pre	Lung function pre steroids
lf_post	Lung function post steroids

BP	Output event date, systolic/diastolic if the event date was recorded in the last 3 years and not in 3rd party consultations.
Family History	Output event date, read term, read term3 and text not in third party consultations.

Exclude Codes	**Hepatitis B immunology** If read code is 43B% and not 43B4% then exclude If read code is 8CAE%, 13N5%, 13N9%, 6827%, A789%, A78A%, 43W7%, 43W8%, Z4B2%, 43d5%, 43d6%, ZGB4%, 43h2%, 4J34%, 4J35%, 43j7%, 4JR7%, 4JDT%, 677N%, 8I3p%, 9Op0%, 43h9%, R109%, J631%, J632%, J633%, 43b4%, 6771%, 677C%, D402%, 14O6%, 5775%, 6828%, 6829%, 4JR1%, 43d5%, 43d6%, 43d7%, 43d8%, 43dA%, 43dB%, 43dC%, 43dD%, 43dE%, 4JDT%, 43k0%, 43jG%, 65PL%, 677R%, 68Nn%, 8I3r%, 8I3u%, 4J3D%, 9Op1%, 43JK%, 43X2%, 43h3%, 43X6%, 43j5%, 43k1%, 4J3B%, 4JQ3%, 677Q%, 8I3s%, 8I3v%, 6829%, 65PM%, 65PS%, N011% or AyuC then exclude **Syphilis or Genetic observations** If read code is A9%, 4L%, 2J1%, 43q%, A7882, A788U, A788V, A788W, A788X, A7054, 7Q052, A70z0, Eu024 or 65V3. then exclude.