

An Introduction to the DOAS Phrase Reference Library



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June, 2008

[Open the Phrase Ref Library Database](#)

[Install SearchInform](#)

The DOAS Phrase Reference Library

- ❑ Is a library of phrases that are useful for finding phrases and for building letters;
- ❑ Allows several experts to compile a list of phrases;
- ❑ Makes it easy for users to find needed phrases and modify them, as necessary;
- ❑ Facilitates organizing letters that you want to reference (Model Letter Library feature)

[Open Database](#)

Plus, you may

- Set reminders for each phrase
- Quickly review only those phrases that are
 - Are approved
 - Need to be finalized
 - Require revision
- Run an existing Word Mail-Merge document
 - Output into a Word file(s)
 - Modify the letters by inserting relevant phrases

When you need a Full-Text Search

The screenshot shows the SoftInform SearchInform Desktop Free application. The interface includes a menu bar (File, View, Options), a toolbar with various managers (Indexes, Synonyms, Stop words, Important words), and a main search area. The search results are displayed in a table with columns for No., Found words, Type, Result name, Words count, Size, and Rating. A preview window shows the text of a selected file, with a specific phrase highlighted. Annotations with arrows point to various parts of the interface: 'Pre-defined search area' points to the 'Index: Base' dropdown; 'File List' points to the search results table; 'Selected File' points to the search input field containing 'alan jordan'; 'Options' points to the search options section; 'Text of File with ...' points to the preview window; and 'Word or Phrase Highlighted' points to the highlighted text in the preview window.

Pre-defined search area

File List

Selected File

Options

Text of File with ...

Word or Phrase Highlighted

No.	Found words	Type	Result name	Words co...	Size	Rating
1	1		\\TAX-CC-FP2\USERS\ajordan\Appro... \Cut and paste.doc	18	19 KB	☆☆☆☆☆
2	3		\\T... \Governmentor_Design and DevelopmentDraft_1.doc	307	30 KB	☆☆☆☆☆
3	3		\\T... \Governmentor_Design and DevelopmentDraft_2.doc	307	33 KB	☆☆☆☆☆
4	1		\\TAX-CC-FP2\USERS\ajordan\Appro... \FAX_Reports.doc	110	40 KB	☆☆☆☆☆
5	1		\\TAX-CC-FP2... \PER 07 - Overtime for TIR Preparation.doc	124	32 KB	☆☆☆☆☆
6	1		... \PER 07 - Overtime Request AuthorizationLasVegas.doc	130	37 KB	☆☆☆☆☆
7	5		\\TAX-CC-FP2\USERS\ajordan\FSA_CL... \FSA080320.doc	655	244 KB	☆☆☆☆☆
8	3		\\T... \Governmentor_Design and DevelopmentDraft_3.doc	424	28 KB	☆☆☆☆☆
9	3		\\T... \Governmentor_Design and DevelopmentDraft_4.doc	482	32 KB	☆☆☆☆☆
10	1		\\TAX-CC-FP2\SHARED\Div - DDAS... \rptMayCallBack.xls	225	11 KB	☆☆☆☆☆
11	1		\\TAX-CC-FP2\USERS\ajor... \eGrant Role Request09.doc	229	51 KB	☆☆☆☆☆
12	1		\\TAX-CC-FP2\USERS\ajordan\Exp... \ExpReim080229.xls	294	69 KB	☆☆☆☆☆
13	1		\\TAX-CC-FP2\USERS\ajordan... \Travel Expense Claim.xls	315	70 KB	☆☆☆☆☆

Preview window: / 6 View style

Goals:
Create a blueprint and implement the first phase of a working prototype, and also to lay the foundation for follow-up phases.
Assure that DDAS invests all funds wisely, by taking incremental steps.
Concentrate on configuring well-functioning existing systems that are employed in Missouri (the Show Me state) and other locations.
Customize when necessary, and only when necessary.
Assure that all data in the new system can easily be exported to Oracle, or SQL Server if circumstances change. The type of system is mandated.

Phase 1 | Design & Development of the foundation for an integrated database system
Specifically, will create a Graphical User Interface (GUI) of 5 key screens that are hooked up to the database.

This Design and Development effort assures that we are headed down the road towards creating a system that has a high chance of having wasted time, money and resources resulting in undesired results because we were not performing a vendor-biased Gap Analysis.

Phase 1 | Mitigate performance issues for Centrally Assessed Division of DDAS

From conversations with Alan Jordan, Manager of the Division of DDAS, we understand that the current system is likely to be reach a crisis point by 2005. We are suggesting changes to failing systems. We understand that the current system is likely to be reach a crisis point by 2005. We are suggesting a unique form of partnership that will take the current system to a fully-functional database environment that can be run in parallel for several months to assure that it is error free.

A preliminary design and development, as described above (below) for a fee which doubles as a non-refundable deposit of \$3,950 on Phase 1 of the Design and Development effort.

Search Inform & The Phrase Reference Library . . .

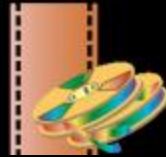
- Serve complementary functions:
 - Search Inform
 - Indexes the parts of your hard drive or network drive that you want to search
 - Finds phrases or words
 - Highlights them
 - Opens the desired file when you click on it.
- The Phrase Reference Library's features are described in the rest of this show.
- May be used together.

Note: This version of Search Inform is freeware.

Phrase Ref Library

Major Features

(Hyperlinked Table of Contents)



(As you review this show, click on icons like this to watch video tutorials that use Adobe Flash)

[Use the existing library of phrases](#)

[Print out various reports](#)

[Add phrases to the library for future use](#)

[Open or Create a Word document](#)

[Customize output from a Word mail-merge document](#)

[Open Database](#)

Using the Existing Library of Phrases

Phrases - Double-click blue headings to sort. Double-click a phrase in a gray box for details.

Category	Phrase Name	Phrase	Date Entered By	
Appearances 2	Bruce and Dino appeared	Bruce Gustafson, Supervisor of the Centrally-Assessed Properties Section, and Dino DiCianno, Executive Director, appeared on behalf of the Department of Taxation (Department).	Alan Jordan	Type a reason to make this phrase inactive.
Appearances 11	Taxpayer provided sufficient evidence	Taxpayer provided sufficient evidence.	01/11/2008 Fri. Alan Jordan	Type a reason to make this phrase inactive.
Appearances 5	Appearances by more than one person - SBE - Washoe County Assessor's Office	@@@ and @@@ appeared on behalf of certain taxpayers while others were not represented (Taxpayers). See, Exhibit A. Taxpayers represented by @@@ and @@@; Exhibit B. Other Taxpayers whose property is subject to the remand by the State Board of Equalization.	Alan Jordan	Type a reason to make this phrase inactive.
Complimentary Closing 13	Sincerely, Terry E. Rubald, Chief, DOAS	Sincerely, Terry E. Rubald	01/11/2008 Fri. Alan Jordan	Type a reason to make this phrase inactive.
Conclusions of Law 27	Conclusion of Law: Timely Appeal ... Granted	CONCLUSIONS OF LAW 1) The Taxpayer timely filed a notice of appeal, and the State Board has jurisdiction to determine this matter.	01/14/2008 Mon. Alan Jordan	Type a reason to make this phrase inactive.
Conclusions of Law 3	Timely Filing - Inadequate Record - Remanded to County Board	CONCLUSIONS OF LAW The Assessor timely filed a notice of Appeal and the State Board has jurisdiction to determine this matter.	Alan Jordan	Type a reason to make this phrase inactive.

Record: 14 of 30

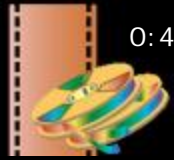
Click on Search/Review Phrase Reference Library (or <Alt>+P)

The screenshot shows a window titled "Main Switchboard" with a teal header "DOAS Phrase Reference Library". On the left, three small preview windows are shown: "Phrase Reference Library", "Model Letter Library", and "Add or Revise a Phrase". On the right, a menu of options is listed, each with a checkbox and a keyboard shortcut:

- Search/Review Phrase Reference Library
- Browse Phrase Reference Library
- Use Model Letter Library
- Add Phrases to the Phrase Reference Library
- Add a new Model Letter to the Model Letter Library
- View Reports and Special Queries
- DB Administrator ONLY
- Exit Application

A blue box highlights the "Search/Review Phrase Reference Library" option. A link "View Video Directions" is located above the menu.

Sort by clicking on a blue header



Phrases - Double-click blue headings to sort. Double-click a phrase in a gray box for details.

Category	Phrase Name	Phrase	Date Entered	By
Appearances 5	Appearances by more than one person - SBE - Washoe County Assessor's Office	@@@ and @@@ appeared on behalf of certain taxpayers while others were not represented (Taxpayers). See, Exhibit A Taxpayers represented by @@@ and @@@; Exhibit B Other Taxpayers whose property is subject to the remand by the State Board of Equalization.		Alan Jordan
Appearances 2	Bruce and Dino appeared	Bruce Gustafson, Supervisor of the Centrally-Assessed Properties Section, and Dino DiCianno, Executive Director, appeared on behalf of the Department of Taxation (Department).		Alan Jordan
Appearances 11	Taxpayer provided sufficient evidence	Taxpayer provided sufficient evidence.	01/11/2008 Fri.	Alan Jordan
Complimentary Closing 13	Sincerely, Terry E. Rubald, Chief, DOAS	Sincerely, Terry E. Rubald	01/11/2008 Fri.	Alan Jordan
Conclusions of Law 3	Timely Filing - Inadequate Record - Remanded to County Board	CONCLUSIONS OF LAW The Assessor timely filed a notice of Appeal and the State Board has jurisdiction to determine this matter.		Alan Jordan
Conclusions of Law 27	Conclusion of Law: Timely Appeal ... Granted	CONCLUSIONS OF LAW 1) The Taxpayer timely filed a notice of appeal, and the State Board has jurisdiction to determine this matter.	01/14/2008 Mon.	Alan Jordan

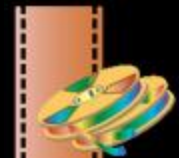
Record: 1 of 29

Optionally: Filter by double-clicking on a Category

Phrases - Double-click blue headings to sort. Double-click a phrase in a gray box for details.

Category	Phrase Name	Phrase	Entered By
Appearances	Appearances by more than one person - SBE - Washoe County Assessor's Office	I@@@ and @@@ appeared on behalf of tax payers while others were not represented (Taxpayer - see Exhibit I) Taxpayers represented by @@@ and @@@; Exhibit II Other Taxpayers whose property is subject to the remand by the State Board of Equalization.	Alan Jordan
Appearances	Bruce and Dino appeared	Bruce Gustafson, Supervisor of the Centrally-Assessed Properties Section, and Dino DiCianno, Executive Director, appeared on behalf of the Department of Taxation (Department).	Alan Jordan
Appearances	Taxpayer provided sufficient evidence	Taxpayer provided sufficient evidence.	01/11/2008 Fri Alan Jordan
Complimentary Closing	Sincerely, Terry E. Rubald, Chief, DGAS	Sincerely, Terry E. Rubald	01/11/2008 Fri Alan Jordan
Conclusions of Law	Timely Filing - Inadequate Record - Remanded to County Board	CONCLUSIONS OF LAW The Assessor timely filed a notice of Appeal and the State Board has jurisdiction to determine this matter.	Alan Jordan
Conclusions of Law	Conclusion of Law: Timely Appeal ... Granted	CONCLUSIONS OF LAW 1) The Taxpayer timely filed a notice of appeal, and the State Board has jurisdiction to determine this matter.	01/14/2008 Mon Alan Jordan

Record: 1 of 29



6:37

Once filtered, only items in that category appear

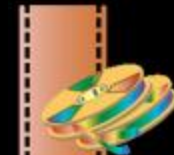
Category	Phrase Name	Phrase
Appearances	Taxpayer provided sufficient evidence	Taxpayer provided sufficient ev
Appearances	Appearances by more than one person - SBE - Washoe County Assessor's Office	I@@@ and @@@ appeared were not represented (Taxpaye by @@@ and @@@; Exhibit I subject to the remand by the St
Appearances	Bruce and Dino appeared	Bruce Gustafson, Supervisor of and Dino DiCianno, Executive I Department of Taxation (Depart

2x-click again to remove the filter

To search:

Complimentary Closing	Sincerely, Terry E. Rubald, Chief, DOAS	Sincerely,	01/11/2008 Fri	Type a reason to make this phrase inactive.
13		Terry E. Rubald	Alan Jordan	
Conclusions of Law	Timely Filing - Inadequate Record - Remanded to County Board	CONCLUSIONS OF LAW The Adjudor timely filed a notice of Appeal and the State Board has jurisdiction to determine this matter.	01/11/2008 Fri	Type a reason to make this phrase inactive.
3			Alan Jordan	
Conclusions of Law	Conclusion of Law: Timely Appeal ... Granted	CONCLUSIONS OF LAW 1)The Taxpayer timely filed a notice of appeal, and the State Board has jurisdiction to determine this matter.	01/14/2008 Mon	Type a reason to make this phrase inactive.
27			Alan Jordan	

Place cursor inside a phrase



2:48

Phrases - Double-click blue headings to sort. Double-click a phrase in a gray box for details.

Category	Phrase Name	Phrase	Date Entered By
Appearances	Appearances by more than one person - SBE - Washoe County Assessor's Office	@@@ and @@@ appeared on behalf of certain taxpayers while others were not represented (Taxpayers). See, Exhibit A I Taxpayers represented by @@@ and @@@; Exhibit B I Other Taxpayers whose property is subject to the remand by the State Board of Equalization.	01/11/2008 Fri Alan Jordan
Appearances	Bruce and Dino appeared	Bruce Gustafson, Supervisor of the Centrally-Assessed Properties Section, and Dino DiCianno, Executive Director, appeared on behalf of the Department of Taxation (Department).	01/11/2008 Fri Alan Jordan
Appearances			01/11/2008 Fri Alan Jordan
Complimentary Closing			01/11/2008 Fri Alan Jordan
Conclusions of Law			01/11/2008 Fri Alan Jordan
Conclusions of Law	Conclusion of Law: Timely Appeal ... Granted	CONCLUSIONS OF LAW 1)The Taxpayer timely filed a notice of appeal, and the State Board has jurisdiction to determine this matter.	01/14/2008 Mon Alan Jordan

Record: 12 of 29

Find and Replace

Find What: 361.375

Look In: txtPhraseStripped

Match: Any Part of Field

Search: All

Match Case Search Fields As Formatted

Find Next

Cancel

- Press <Ctrl> + F to bring up the Search Box
- Select Any Part of Field
- Type in the phrase you want to find;
- Click [Find Next]

If you don't find the info you want . .

Findings of Fact	Findings of Fact - Adequate Notice	FINDINGS OF FACT	01/14/2008 Mon.	Type a reason to make this phrase inactive.
28		1) The State Board is an administrative body created pursuant to NRS 361.375. 2) The State Board is mandated to hear all appeals of property tax.	Alan Jordan	

Find and Replace dialog box showing search criteria: Find What: 361.375, Look In: bitPhraseStripped, Match: Any Part of Field, Search: All. Buttons: Find Next, Cancel.

□ . . . Click [Find Next]

□ Does this look like what you want? If so

General	Findings of Fact - Inadequate Record	FINDINGS OF FACT		
10		The State Board is an administrative body created pursuant to NRS 361.375. The State Board is mandated to hear all appeals of property tax.		
General	Per your request we are rescheduling your petition for appeal	Subject: Parcel # 1221-03-000-007 Dear Mr. & Mrs. Dicks: On your request, we are rescheduling your petition for appeal. Your case	Alan Jordan	

Use **Filter**, **Sort** and **Search** Together

- **Filter** – To reduce the number of records to examine.
- **Sort** – By date, person entered, phrase name or category to help you scan the data.
- **Search** – To find specific phrases, NRS sections, etc.



Double-click on the phrase to bring up the Review, Add or Revise screen

1 Decide if you want to write a phrase, open a letter or do a mail merge.

Wednesday, January 30, 2008 1:21 AM Clear Reminder Set Reminder 10:26, 01/29/08 To Do: Check to see if 241.020 has been u

Optional Source: Optional Hyperlink to Source:

2 Type in or copy-and-paste information in the box below. Formatting will be maintained, and you may highlight words, etc. if the RTF Toolbar is active.

The State Board, having considered all evidence, documents and testimony, hereby makes the following Findings of Fact, Conclusions of Law and Decision.

FINDINGS OF FACT

1) The State Board is an administrative body created pursuant to NRS 361.375.
2) The State Board is mandated to hear all appeals of property tax assessments pursuant to NRS 361.360.
3) The Taxpayers and the Assessor were given adequate, proper and legal notice of the time and place of the

3 Give the phrase a meaningful name: Findings of Fact - Inadequate Record

4 Select your name from this box: Alan Jordan Unlock the drop down boxes to make changes. Lock again before filtering. Modification Level (Optional)

5 Select categories: General Sub 1: Sub 2: Sub 3:

6 Optionally, open or create a new document.

Edit an Existing Document or do a Mail Merge Create a New Document Select Document Type

Enter Document Name:

Select Folder Path

Select / Open Word

You may now review the screen in detail, and you may **copy-and-paste** the information that you want into a Word document.

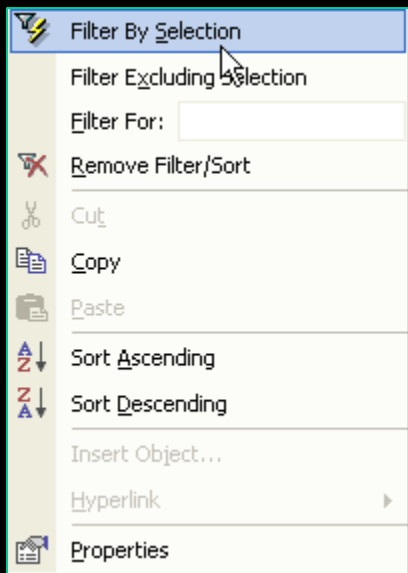


Filter by category and sub-category to save time and effort.

3 Give the phrase a meaningful name: **Bruce and Dino appeared** 2

4 Select your name from this box:

5 Select Sub 1: Sub 2: Sub 3:



- ❑ Assure that the category drop-down boxes are locked, so you cannot accidentally change any data.
- ❑ **Right-click** to bring up the menu on the left and then choose the Filter Option.
- ❑ Filter by selection will only show the phrases to those with that exact category.
- ❑ **When done**, Right-click and select Remove Filter/Sort.



1:01

Sometimes, you may find a phrase that is not useful. Make it inactive.

CA - Airlines	Junk Phrase	This phrase is junk	01/30/2008 Wed.	Type a reason to make this phrase inactive.
87			Alan Jordan	<input type="text" value="Hiding my junk"/>

- Type a brief reason for not using the phrase.
- The next time that you open this screen, the record will be hidden, **not deleted**.
[\(How to delete the phrase.\)](#)



Most should be useful, and some phrases will be highlighted

2

Type in or copy-and-paste information in the box below. Formatting will be maintained, and you may highlight words, etc. if the RTF Toolbar is active.

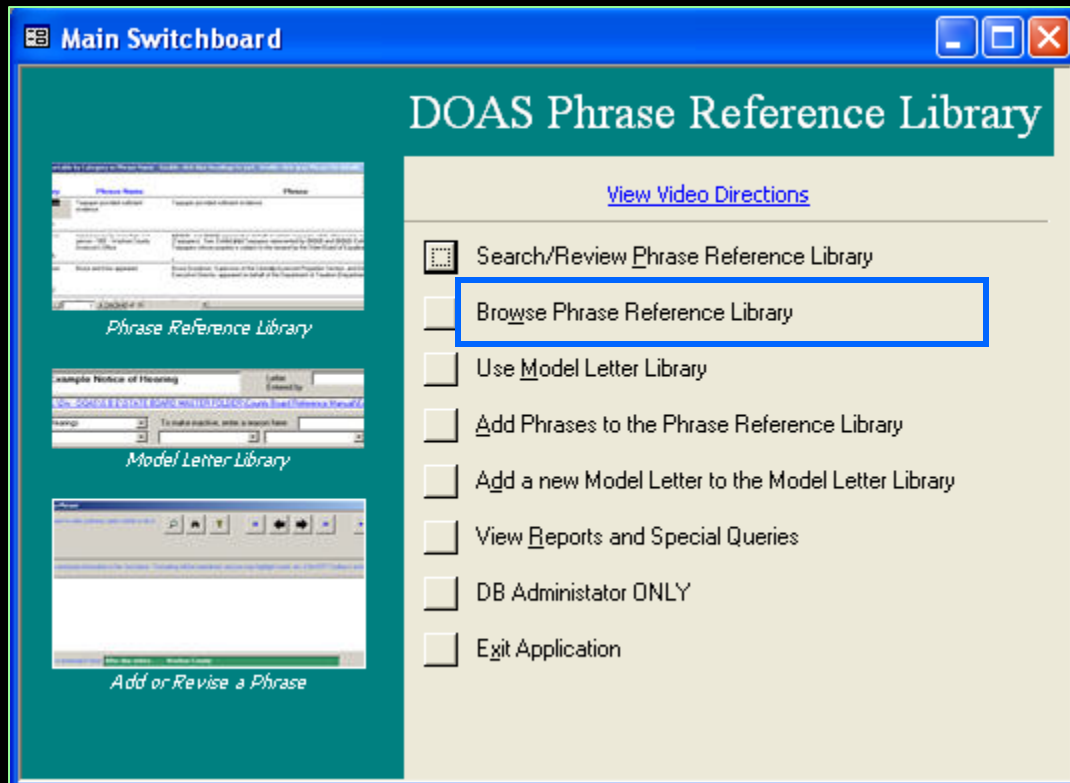
- hearing before the State Board, and the matter was properly noticed pursuant to the Open Meeting Law at NRS 241.020.
- 4) The State Board found there was an **inadequate** record submitted by the County Board to support the County Board's decision to **roll back** the property values **in Crystal Bay/Incline Village** to the 2002/2003 values.
 - 5) Any finding of fact above construed to constitute a conclusion of law is adopted as such to the same extent as if originally so denominated.

I

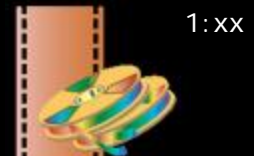
This means that the person entering the phrase thought it was **likely that this information will need to be customized.**

After you copy-and-paste this phrase, change the wording, if necessary.

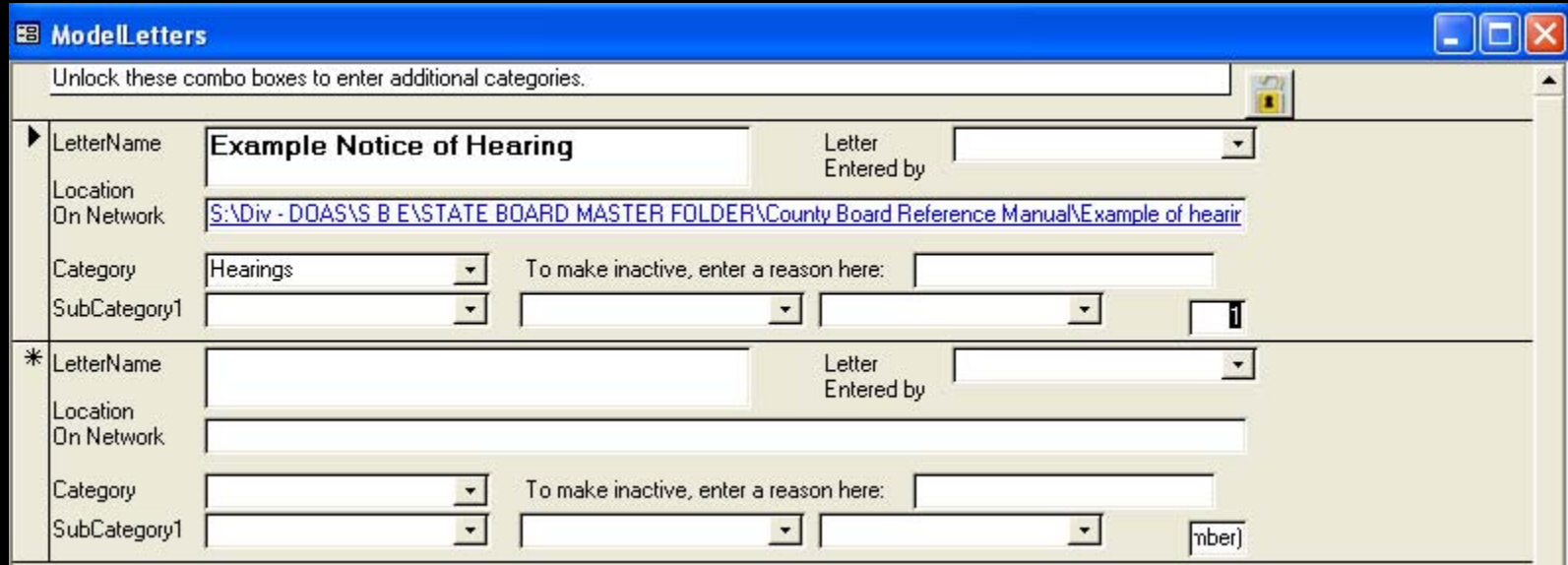
In addition to searching for a phrase you may BROWSE through phrases



- Click the Browse button. In the next screen, click the forward and back arrows to find the information you want



Sometimes, phrases aren't enough

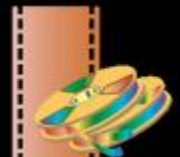


The screenshot shows a window titled "ModelLetters" with a blue title bar. Below the title bar is a text box containing the instruction "Unlock these combo boxes to enter additional categories." and a lock icon. The main area contains two forms. The first form is for a letter named "Example Notice of Hearing". It includes fields for "Letter Name", "Location On Network" (with a hyperlink), "Category" (set to "Hearings"), and "SubCategory1". There are also dropdown menus for "Letter Entered by" and "To make inactive, enter a reason here:". The second form is identical but marked with an asterisk and is currently empty.

□ That's when the Model Letter Library comes in handy. Click on a hyperlink to quickly open the file you want.

1:16

□ Hint: If there are many model letters, you might want to filter the selection first.



Recap: We have covered how to:

- Use phrases
- Add new phrases
- Open an existing document
- Create a new document

Running Reports and Special Queries



qryPhrasesByPersonEntering : Select Query

Entered By	Category	Phrase Name	Phrase
Alan Jordan	Appearances	Appearances by more than one person - SBE - Washoe County Assessor's Office	@@@ and @@@ appeared on behalf of certain taxpayers while others were not represented (Taxpayers). See, Exhibit "A" – Taxpayers represented by @@@ and @@@, Exhibit "B" – Other Taxpayers whose property is
Alan Jordan	Appearances	Bruce and Dino appeared	Bruce Gustafson, Supervisor of the Centrally-Assessed Properties Section, and Dino DiCianno, Executive Director
Alan Jordan	Ap		
Alan	Co		

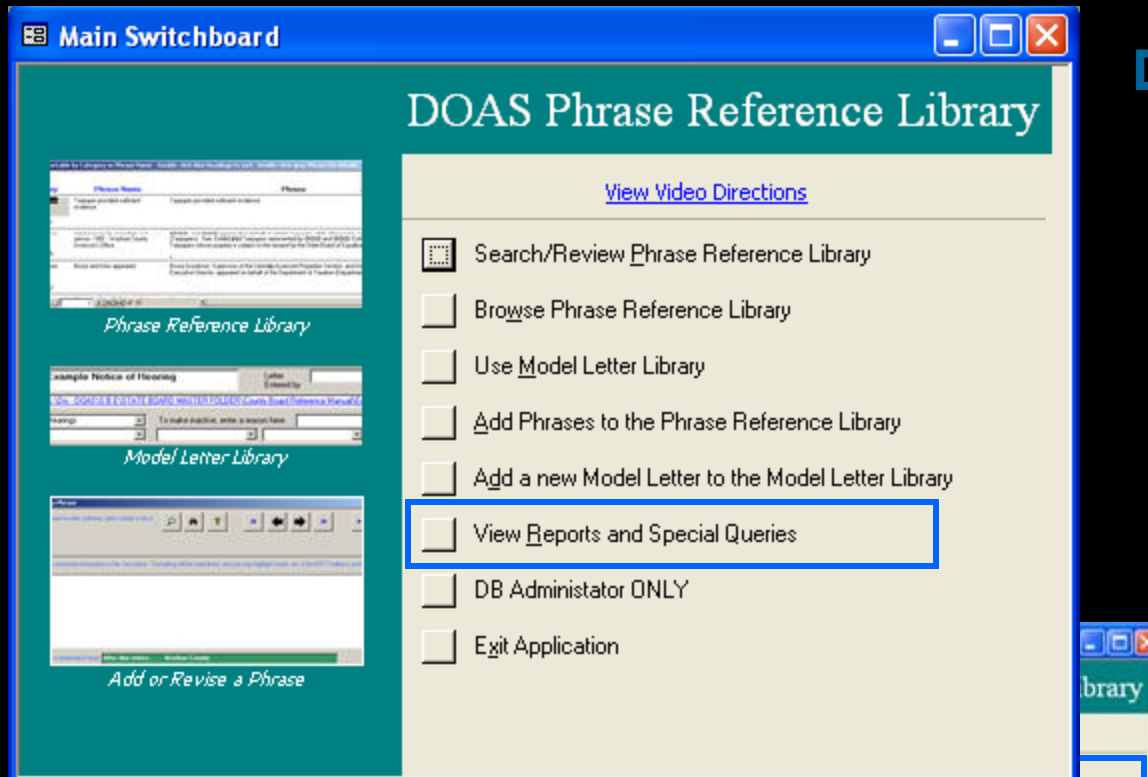
Record: 1 2 3 of 3

qryInactivePhrases : Select Query

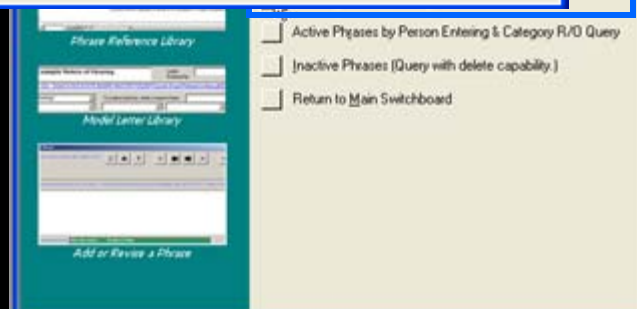
Phrase Name	Category	Phrase	Entered By	DateEntered
After due notice - Washoe County	Property Valuations		Alan Jordan	
This is a test. Delete me.	General		Alan Jordan	1/14/2008 11:04:18 AM
Junk Phrase	Hearings		Alan Jordan	1/15/2008 12:44:07 PM
*				1/30/2008 2:27:34 PM

Record: 1 2 3 of 3

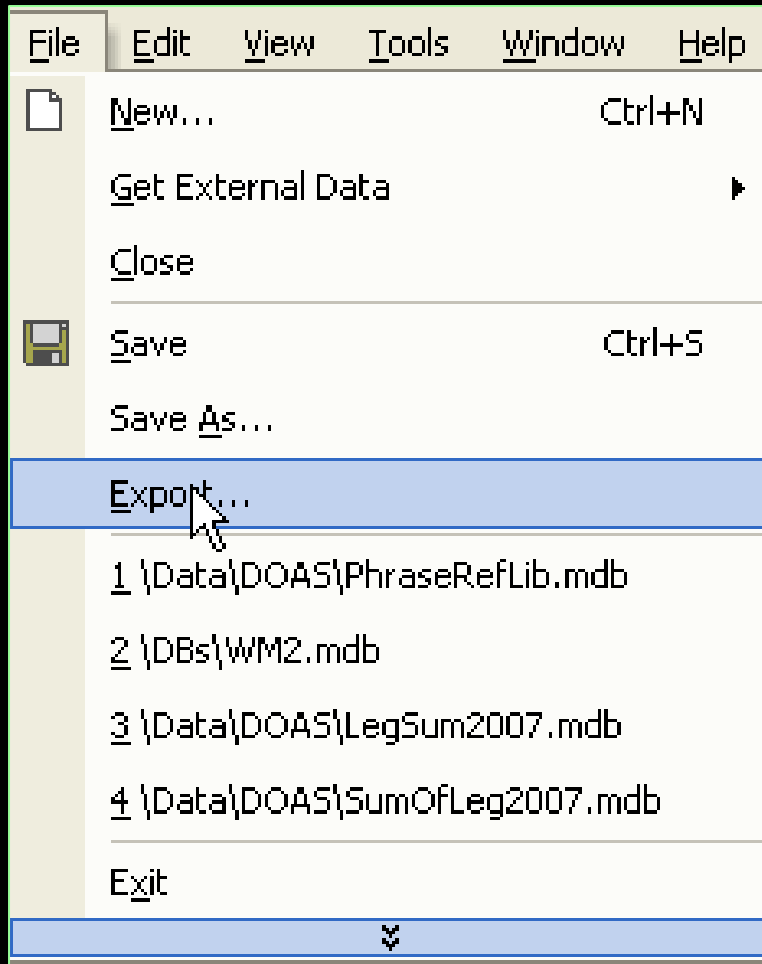
Navigate to the Reports and Special Queries Menu; click on the item you want to run.



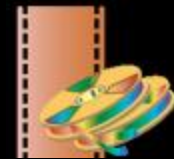
- Hint: You may **view** the report, **print** it or **export** it to a Word document or Excel spreadsheet.



To export a report



- View it
- Then, use the menu commands to export it to a file



5:29
Requires
Adobe
Flash


One of the reports is a Read-Only Query

Reports and Queries


DOAS Phrase Reference Library

[View Video Directions](#)

- Active Phrases by Category
- Active Phrases by Person Entering & Category R/O Query
- Inactive Phrases (Query with delete capability.)
- Return to Main Switchboard



Phrase Reference Library



Model Letter Library

Using this query (*Active Phrases by Person Entering and Category*) makes it easy to copy-and-paste

qryPhrasesByPersonEntering : Select Query

Entered By	Category	Phrase Name	Phrase
Alan Jordan	Appearances	Appearances by more than one person - SBE - Washoe County Assessor's Office	@@@ and @@@ appeared on behalf of certain taxpayers while others were not represented (Taxpayers). See, Exhibit "A" - Taxpayers represented by @@@ and @@@; Exhibit "B" - Other Taxpayers whose property is
Alan Jordan	Appearances	Bruce and Dino appeared	Bruce Gustafson, Supervisor of the Centrally-Assessed Properties Section, and Dino DiCianno, Executive Director, appeared on behalf of the Department of Taxation (Department).
Alan Jordan	Appearances	Taxpayer provided sufficient evidence	Taxpayer provided sufficient evidence.
Alan	Complimentary	Sincerely, Terry E.	Sincerely,

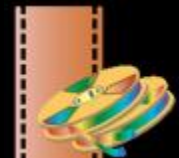
Records: 1 of 29

Another one of the reports is a **Delete Query**.

Phrase Name	Category	Phrase	Entered By	DateEntered
After due notice Washoe County	Property Valuations		Alan Jordan	
This is a test. Delete me.	General		Alan Jordan	1/14/2008 11:04:18 AM
Junk Phrase	Hearings		Alan Jordan	1/15/2008 12:44:07 PM
*				1/30/2008 2:27:34 PM

To use it, highlight the rows that you want to delete and press the key.

- This special query will destroy data.
- Do not use this query unless you are certain the data is junk. Instead, make the record inactive.



1:15
Requires
Adobe
Flash


Before and After

gryInactivePhrases : Select Query

Phrase Name	Category	Phrase	Entered By	DateEntered
After due notice . . . Washoe County	Property Valuations		Alan Jordan	
This is a test. Delete me.	General		Alan Jordan	1/14/2008 11:04:18 AM
Junk Phrase	Hearings			1/15/2008 12:44:07 PM
*				1/30/2008 2:27:34 PM

Record: 1 of 3

Microsoft Access

 **You are about to delete 2 record(s).**

If you click Yes, you won't be able to undo this Delete operation. Are you sure you want to delete these records?

gryInactivePhrases : Select Query

Phrase Name	Category	Phrase	Entered By	DateEntered
After due notice . . . Washoe County	Property Valuations		Alan Jordan	
				1/30/2008 2:27:34 PM

The deleted records are gone forever!

Adding Phrases to the Library for Future Use

1 Decide if you want to write a phrase, open a phrase into a new phrase, or add a phrase to the library for future use.

Wednesday, January 30, 2008 0:02 AM #Name? To Do: #Name?

Optional Source: Optional Hyperlink to Source:

2 Type in or copy-and-paste information in the box below. Formatting will be maintained, and you may highlight words, etc. if the RTF Toolbar is active.

3 Give the phrase a meaningful name:

4 Select your name from this box:

5 Select categories: Sub 1: Sub 2: Sub 3:

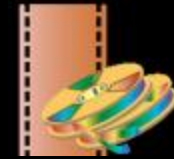
6 Optionally, open or create a new document.

From time-to-time mini-help suggestions will appear here.

Enter Document Name:

76

Adding Phrases is Easy



3:06
Requires
Adobe
Flash

Review, Add or Revise a Phrase

1 Decide if you want to write a phrase, open a letter or do a mail merge.

Wednesday, January 30, 2008 05 PM

Optional Source: Optional Hyperlink to Source:

2 Type in or copy-and-paste information in the box below. Formatting will be maintained, and you may highlight words, etc. if the RTF Toolbar is active.

3 Give the phrase a meaningful name:

4 Select your name from this box:

5 Select categories:

6 Optionally, open or create a new document.

Drop downs unlocked. Lock again before filtering.

From time-to-time help suggestions will appear here.

Edit an Existing Document or do a Mail Merge Create a New Document

Select Folder Path: Select / Open Word

- Follow the steps 1, 2, 3, 4, 5
- Note: The red box must be showing if you want to change the data in drop down boxes.
- When you are not adding a record, these are locked to assure that you don't change data when you filter for a category.

To manually unlock the boxes, click on the lock/unlock button.

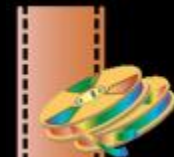
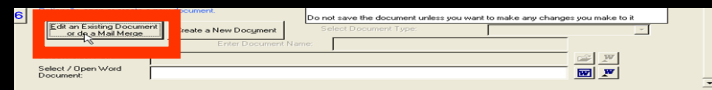
Open or Create a Word Document



There are several ways to open a Word Document



- ❑ Word button opens Word only.
- ❑ The top hyperlink opens a specific source—useful for reference
- ❑ Buttons and the file section boxes in Step 6 are for convenience.
- ❑ The Model Letter Library is useful for quickly locating documents earmarked as relevant.



3:29
Requires
Adobe
Flash

Customize output from
a Word mail-merge
document.



Customization Steps – 1 of 2 :

1. Use the normal routines you would use to prepare for a Mail Merge.
2. Perform the Mail Merge – Outputting the information to a file or files.*
3. Use the Phrase Reference Library to open the file(s).
4. Use the Phrase Reference Library to find additional phrases.

* If you have many letters to generate, it is easier to create several smaller files rather than one huge file.

Customization Steps – 2 of 2 :

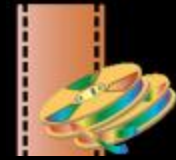
5. Copy-and-paste in relevant phrases.
6. Check for highlighted phrases, and change the information
7. Save the file
8. Run a spelling check
9. Make sure the dates are appropriate.
10. Print the letters.

* If you have many letters to generate, it is easier to create several smaller files rather than one huge file.

Special Features

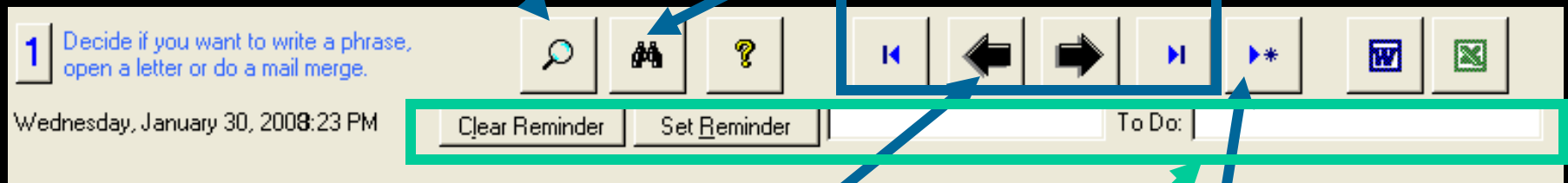


Button Bar Functions



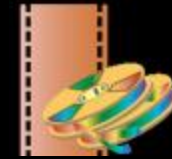
2:21
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Flash

- Go to the Search/Review Phrases screen
- Find a Phrase (instead of <Ctrl> + F)



- Record navigation
 - First phrase, Previous phrase, Next phrase, Last phrase
 - Add new phrase
- Set and Clear a Reminder

Phrase-Based Reminders



1:52
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Flash

Review, Add or Revise a Phrase

1 Decide if you want to write a phrase,
open a letter or do a mail merge.



Tuesday, February 05, 2008 2:31 PM

Clear Reminder

Set Reminder

10:26, 01/29/08

To Do:

Check to see if 241.020 has been l

If you enter a reminder, the next time you view that phrase, it will be displayed.

Colors:

Yellow if time is growing short;

Red if the reminder time has passed.

Modification Levels



2:43
Requires
Adobe
Flash

Review, Add or Revise a Phrase

1 Decide if you want to write a phrase, open a letter or do a mail merge.

Wednesday, January 30, 2008 4:48 PM Clear Reminder Set Reminder To Do:

Optional Source: Optional Hyperlink to Source:

2 Type in or copy-and-paste information in the box below. Formatting will be maintained, and you may highlight words, etc. if the RTF Toolbar is active.

Entering a modification level is a great way to find phrases that you want to revise. To enter a modification level:

1. Assure that the red box is showing (drop-downs are unlocked)
2. Click the drop-down box on the far right side of item 4, Modification Level
3. Select one of the modification levels.

3 Give the phrase a meaningful name: **Demonstration of entering a Modification Level** 93

4 Select your name from this box: Alan Jordan **Drop downs unlocked. Lock again before filtering.** Modification Level (Optional)

5 Select categories: Testing Sub 1: Sub 2: Sub 3:

6 Optionally, open or create a new document.

Edit an Existing Document or do a Mail Merge Create a New Document Select Document Type:

Select Folder Path: Enter Document Name:

Select / Open Word Document:

Enter a modification level, and you will be able to quickly find all of the phrases that you want to revise, or double-check those that appear to be finalized.

Recap: You may

- Use phrases
- Add new phrases
- Open an existing document
- Create a new document
- Run a mail-merge document and customize the output
- Link to key documents (through the Model Document feature), modify those documents and save them.

Enjoy!