

Rich Text Format (RTF) Workgroup Documents in Chronology

Several documents transitioned to the new Rich Text Format (RTF) because the original HTML implementation did not give users the intended flexibility within the document. These documents offer more editing flexibility within the document. Users can add or remove text from almost anywhere in the document. Some of the new features:

- The document looks more like a letter
- Name merge fields are editable
- Ability to copy and paste table rows
- Ability to add or remove spacing
- Ability to change font style, size, color and use other word processing features.
- Ability to add or remove page breaks
- Ability to use hyperlinks and bookmarks

There are also two new menu options: Re-Merge Document and Reset to Template. Both are available on the Document tab Action menu to allow you to eliminate changes made to the document or start over.



Hints:

- There is no change in how to access workgroup Chronology documents.
- Other documents used primarily by child protection, adult protection and licensing workers will transition to RTF format during a later release.
- Print options are available from the expanded editor only.
- Drop-down menus are not available, watch for other options, i.e. choice or checkbox selections.
- Agencies must create and add new RTF Headers to the RTF documents.
- Type-ahead functionality is available on the Document template field on the Setup tab, except in State Service Plans.
- Add the letters “o” and “x” to your custom dictionary to prevent checkboxes from displaying as spelling errors when using the spellchecker.
- When using the date picker in the document, click the checkmark to save the selected date.



Warning:

- You must click the blue E from the Document tab to edit the RTF document.
- Proof your document prior to finalizing to ensure it reads as intended.
- You should add data to the database first in order to have the option of selecting it from the Setup tab to merge into the document. No data typed directly into the document will backfill into the application.

Document tab



From the Document tab, click the blue E to expand the editor.

The brackets display around merged fields. They are unseen in the main body of the text for a document; yet, the main body of text is still editable.

Document in the Expanded Editor

DATE:	July 29, 2014
TO:	
NAME:	Terri Walk
TRIBE:	
ADDRESS:	444 Lafayette RD #4140
CITY, STATE ZIP:	St Paul, MN 55155

Text inside the brackets

Text outside the brackets.



To Edit a RTF Document:

1. From the **Document** tab, click blue E button.
2. Add or delete text as desired.
 - Text displayed between an open and closed bracket is editable
 - Text displayed outside of the brackets is non-editable
3. Click the **File** menu and select **Save**.

Chronology>New Document>Document Tab>Action Menu



Re-Merge Document

- Clears any edits made to merge fields
- Updates any merge fields that were changed in the database
- Use to update the Header on an existing document.



Warning: Typing immediately before or after the text is considered outside of the merge fields. This means that re-merging from the Setup tab will not affect edits before and/or after the merge field.



To Use Re-Merge Document:

1. From the Chronology folder, access the **Action** menu and expand the Documents folder.
2. Select the document and then select **Display Setup**.

3. Complete the **Setup** tab.
4. Click the **Document** tab.
5. Access the **Action** menu.
6. Select **Re-Merge Document**.
7. Review the warning message and select **Yes** or **No** to continue or cancel.
8. Click the blue E to open the editor.
9. Update document and Click **Save**.

Reset to Template

- Clears all edits made to the document (text, spacing, deletions, etc.) except merge fields.



To Use Reset to Template Document:

1. From the Chronology folder, access the **Action** menu and expand the Documents folder.
2. Select the document and then select **Display Setup**.
3. Complete the **Setup** tab.
4. Click the **Document** tab.
5. Access the **Action** menu.
6. Select **Reset to Template**.
7. Review the warning message and select **Yes** or **No** to continue or cancel.
8. Click the blue E to open the editor.
9. Update document and Click **Save**.