

Rich Text Tagging

Written by Dan Bloomquist

Friday, 22 August 2014 14:55 - Last Updated Friday, 22 August 2014 15:28

This year we matured a feature that allows you to create a word document and fill in field from the study. This greatly reduces the amount of time spent on composing documents for the study. You can use just boiler plate documents that just render at print time. But because the document can be owned by a particular study, you can also edit the document for specialized cases. For instance, the state of California requires a discloser with several dozen fields. To fill this in by hand is quite a task. And then if you change something in the study that affects the math, you would have to go in and re-enter many of the fields. With a tagged document, the fields are all updated at print time with the current results of the math, just like the charts. If you have entered specialized text, it is not affected. Here is a small part of the California discloser as an example.

(7) Based on the method of calculation in paragraph (4) of subdivision (b) of Section 5570 of the C estimated amount required in the reserve fund at the end of each of the next five budget years is:

Year	Estimated Reserve Amount Required	Projected Reserve Fund Balance	Percent
2012	\$92,886	\$57,695	62%
2013	\$111,606	\$63,090	57%
2014	\$113,737	\$51,262	45%
2015	\$99,703	\$22,750	23%
2016	\$103,660	\$11,504	11%

If you have used Microsoft's mail merge, you know what a time saver that is compared to specializing each of several like documents. The tag editor makes creating new documents a breeze. You simply select the study parameter you would like, how to format it, and it will be inserted into the document where your cursor is positioned.

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The dialog box contains the following elements:

- Tree View:**
 - Account Items
 - Account Management Items
 - Study Parameters
 - Funded Component Count
 - Unfunded Component Count
 - Total Component Count
 - Math Parameters Per Unit/Billing Interval
 - Contribution/Term** (selected)
 - Annual Contribution/Unit
 - Term Contribution/Unit
 - Billing Term Cap adjective
 - Billing Term Lower adjective
 - Billing Term Cap noun
 - Billing Term Lower noun
 - Math Parameters
 - Math Annual Parameters
 - General Parameters
 - Current Date/Time
 - Page Number

Format: \$1,000.00

Math Model: _ASSIGNED_

Annual Interval: 1

1,000.00

Buttons: Insert, Close