

Forms and Documents

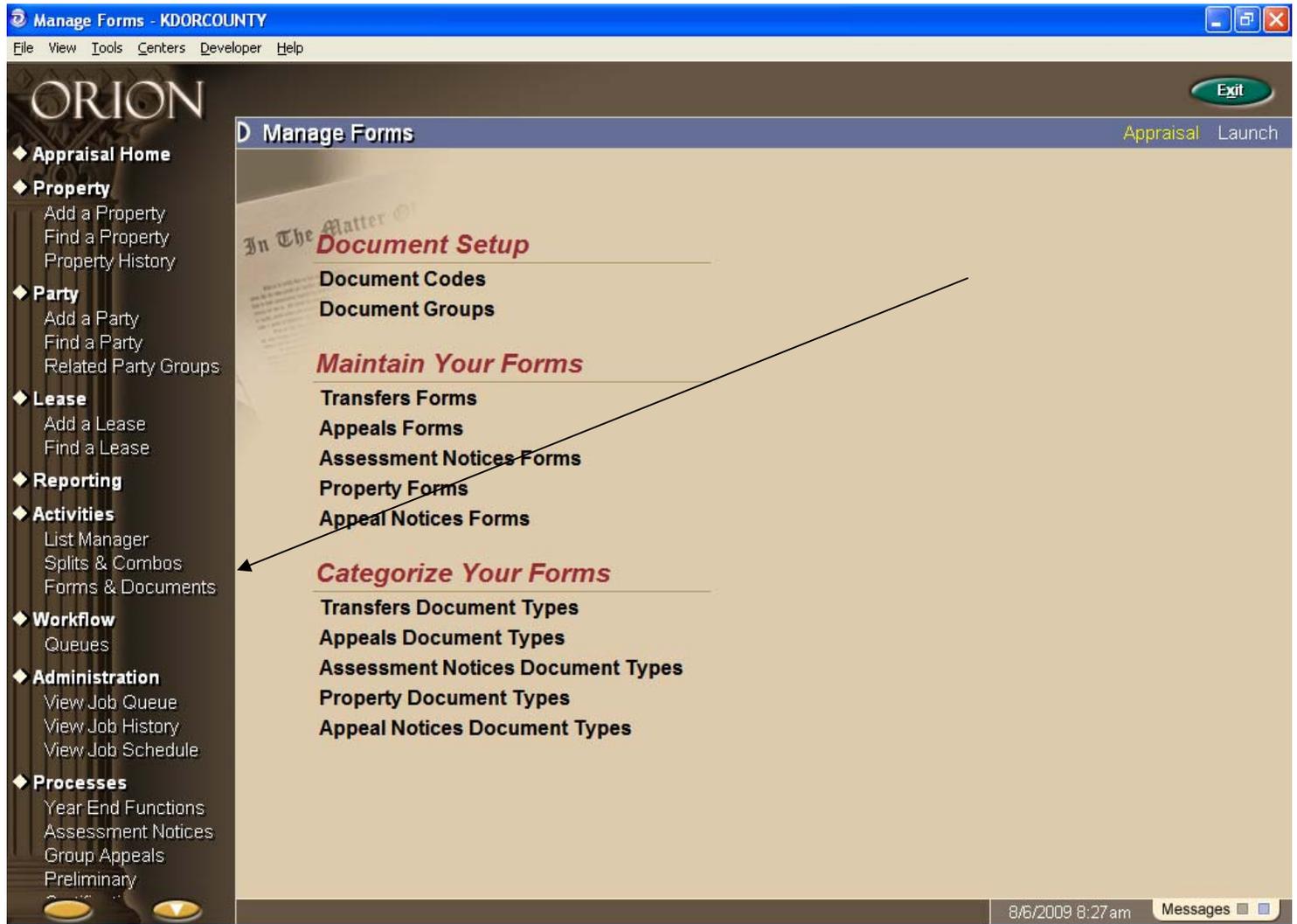
Revision History

Last updated: 8/6/2009 10:28 AM

Ref#	Date	Author	Description	Source
1	7/27/09	Alice Anderson	Initial Creation	
2				
3				
4				

Documents and Appeal Forms.

In order to generate letters, forms and other documents related to appeals, Orion hosts Microsoft Word which allows an integrated Word Merge capability. Documents created with this capability are identified as Forms in Orion terminology. The ability to work with these forms is controlled through Document Security, which is set up apart from general Orion security. Document Security is not addressed in this manual but is discussed in the Document Security manual.



All functionality related to forms and documents is found at Activities/Forms & Documents.

1) Make sure the Document Groups are set up with all expected users assigned to the Groups.

D Maintain Document Groups

Document Groups

Show Obsolete Lists

Info	Code
AllUsers	All Users
Appeals	Appeal Forms

Modify Document Group

Code and Description

Code: Appeals

Description: Appeal Forms

Effective Information

Effective Date: 10/21/2004

Obsolete Date:

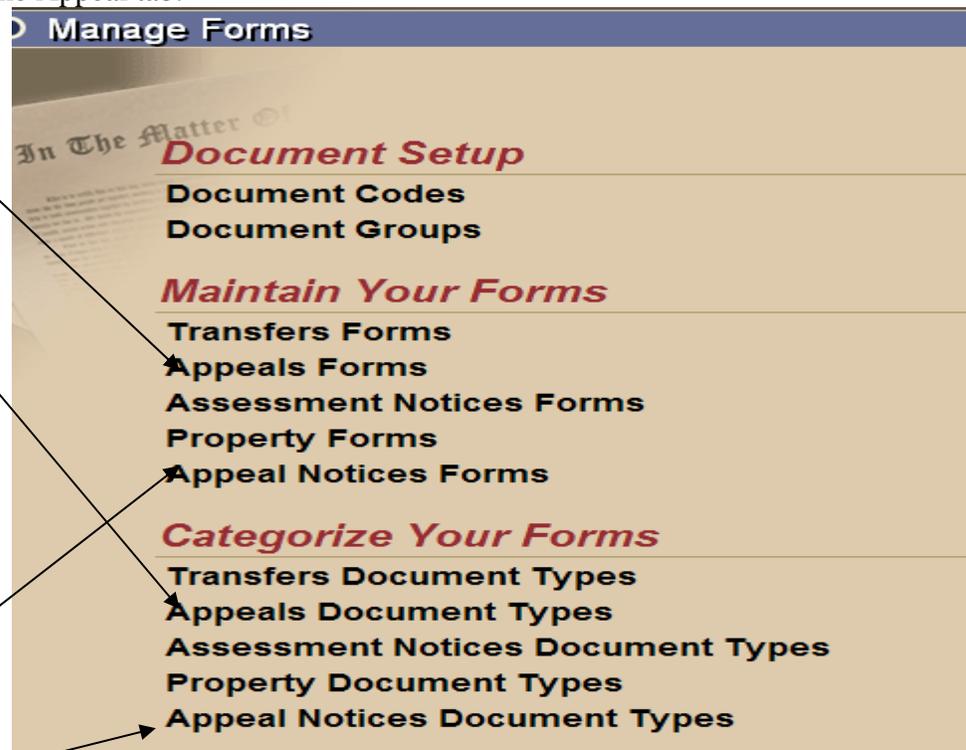
Users

- Admin, TSG
- anderson, alice
- Barta, Jared
- DeVore, Heidi
- Kent, Bob
- role testing, testing roles
- Schnacker, Schnacker
- Support, KDOR
- User, Master

Save Exit

2) Go to Forms & Documents/Categorize Your Forms. Select either Appeals Document Types or Appeal Notices Document Types. Make sure the correct type is listed. This is the list that will be available when creating the document. When you receive your system, the mandatory types for appeals should already be loaded.

Appeal Forms created from the Appeal tab:



Appeal Group Forms created out of the Group Appeals option:

3) Creating an Appeal Form Template:

Go to the Nav bar on the left side of the ORION screen.

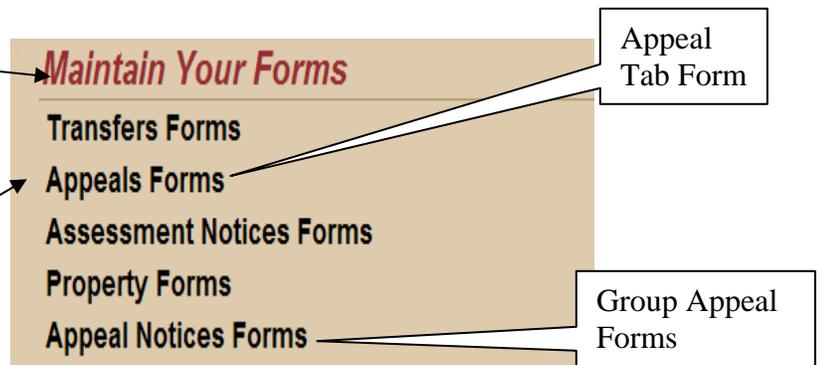
Under the Activities, select the Forms & Documents.



At the Manage Forms screen,

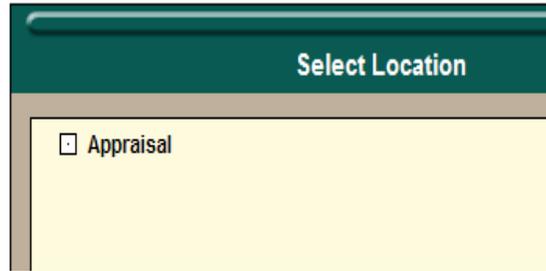


go down to the Maintain Your Forms,



Scroll to the Appeal Forms and click with your left mouse button.

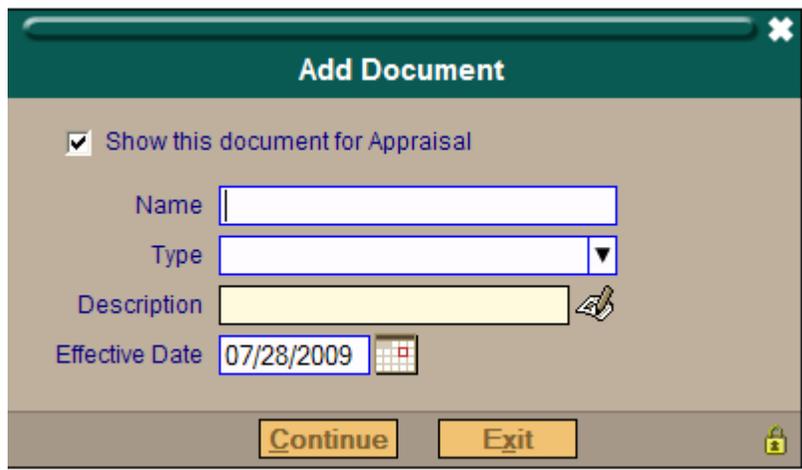
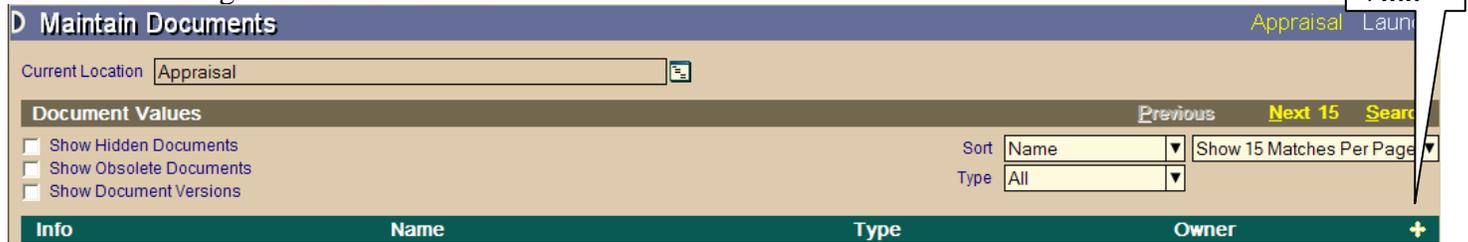
A box will come up with Select Location with Appraisal as the only option, you must click on Appraisal, (if you



select the EXIT at bottom of the screen, you will exit).

This is the Maintain Forms screen.

Click on the + sign to add a document.



Add Document box.

Name – name of the document

Type – use the list from the drop down arrow. (This is the list referenced in Step 2, above).

Question: What if the type you want is not listed? Type is set up in the Categorize Your Forms, Appeal Document Forms, click on Appraisal, then add the form type as needed. NOTE-all the generic appeal forms types have been added with your system. (See Step 2)

Description – Informational description of the form-your choice. Make it informative.

Effective Date – Defaults to the current date the form is added.

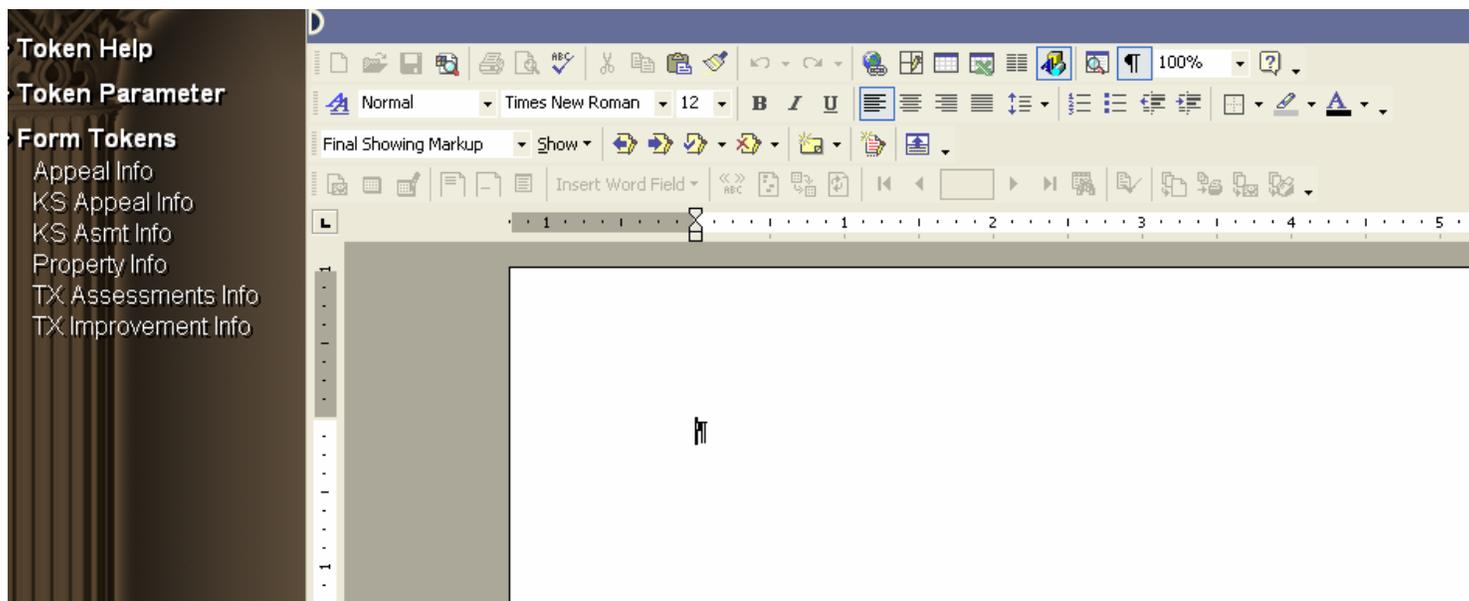
Continue – to add a form.

Exit – will not add form

Lock Key Box – set up security.

After filling out the Add Document box, click Continue.

This will give you a blank page for creating the form desired.



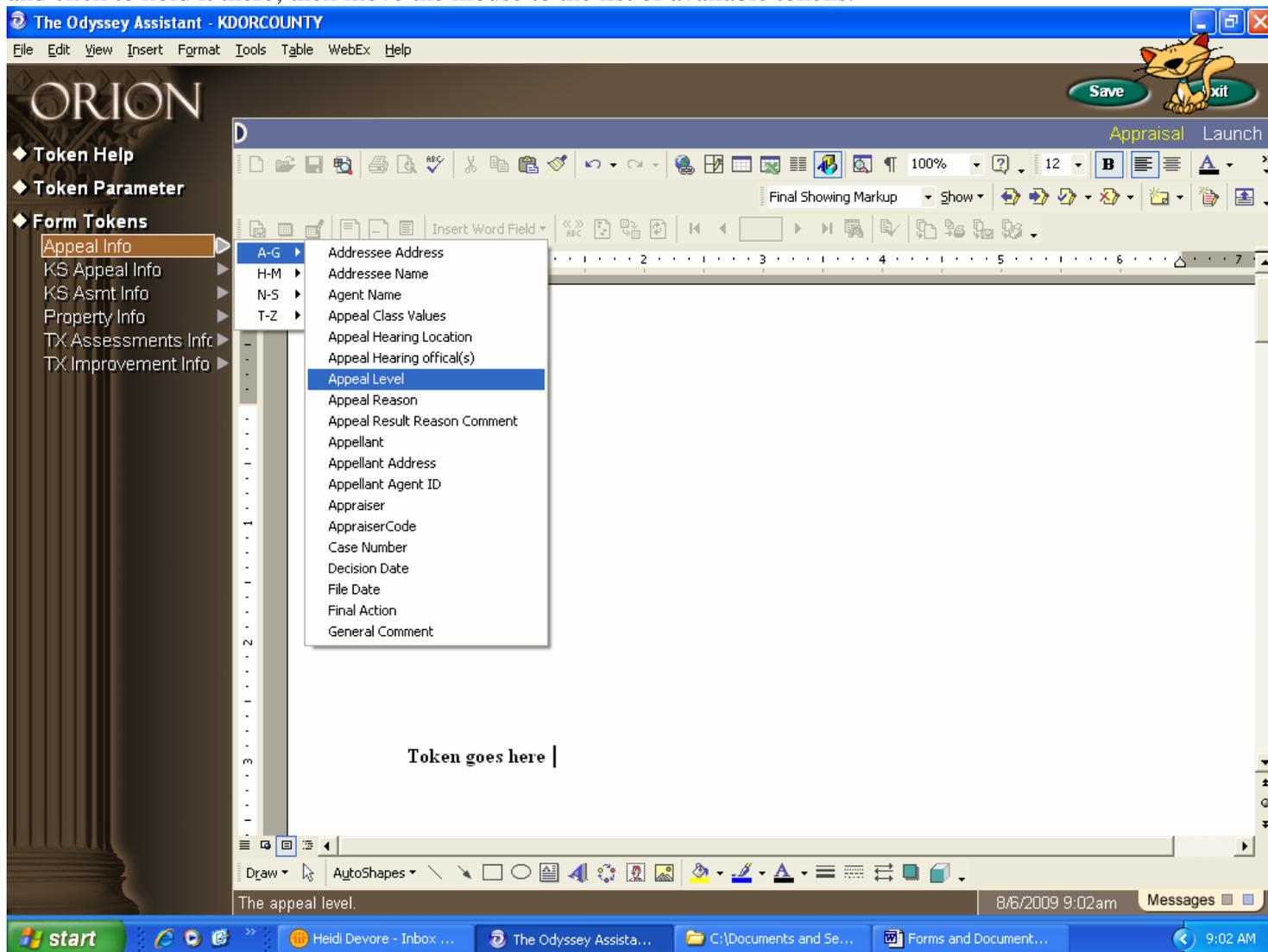
If you have a master copy from an outside source you can use the normal MSWord functions to copy and paste into the new ORION document.

After doing the paste, save the word document to activate the tokens. Tokens are the pieces of data from Orion (for example, Parcel ID, owner's name and address, or values) that get merged into the document.

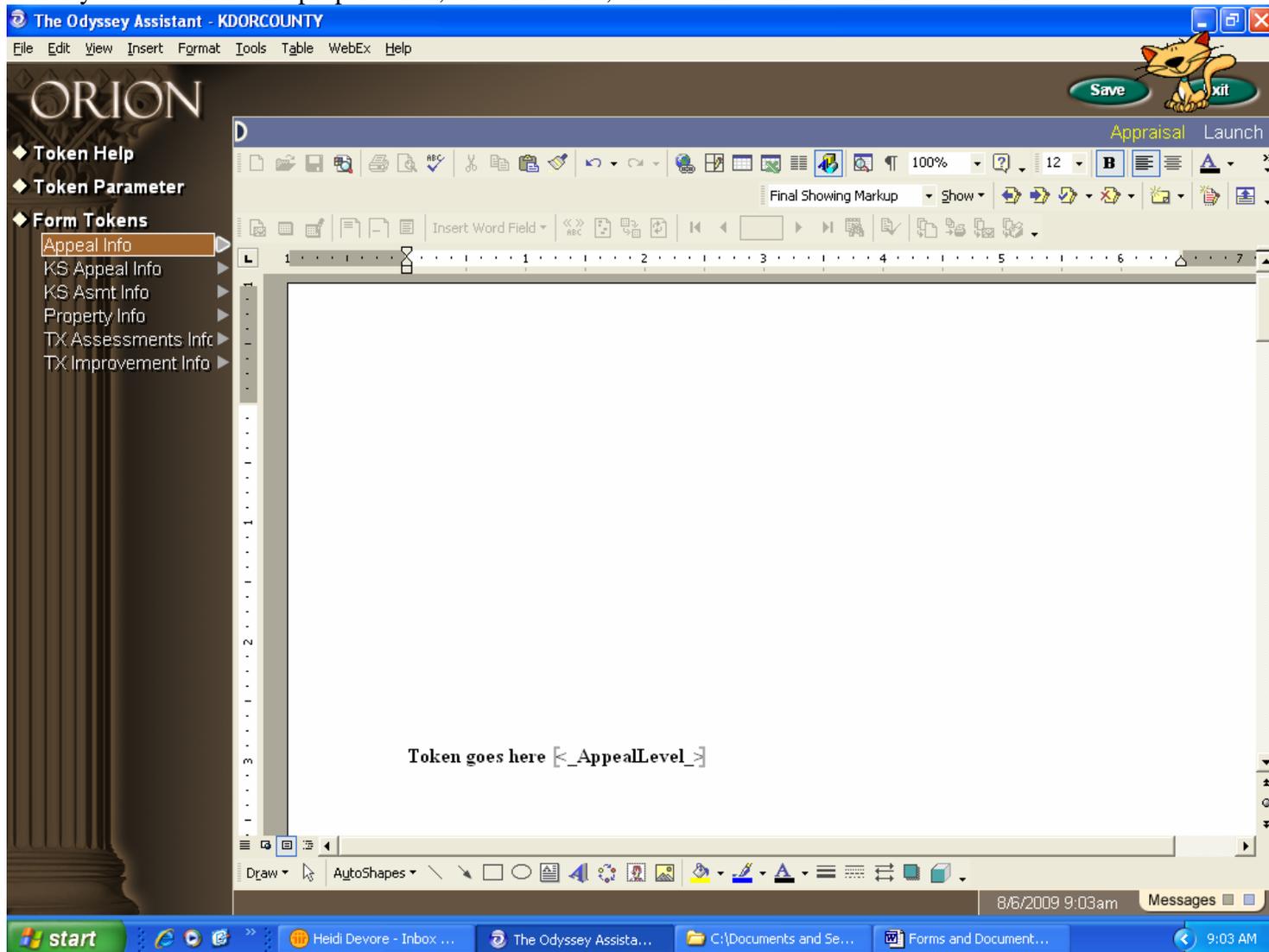


Most MS Word functions are available with in the Orion documents.

To insert a token, simply position the cursor in the document at the point where you want the token's data to print and click to hold it there; then move the mouse to the list of available tokens.



When you have found the proper token, left click on it, and it will be inserted in the document.



Some things I have found about the tokens:

- 1) The brackets are important to keep close to the < > symbols.
`< QuickRefID >`
- 2) If you have a token that will expand, its best to put the token in a table, then you can control the width and let it expand down, instead of wrapping
- 3) When selecting a token, it will be inserted at the point of the cursor on the document.
- 4) Any of the MSWord functions can be used in the documents, fonts, bold, underlines, etc.
- 5) You can cut and paste tokens. Sometimes it is just easier to delete the token than to cut and paste but it can be done
- 6) Difficulty in the format of the document. Spacing to keep everything on one page is just a matter of tweaking the form.

- 7) MSWord 2007 has the Paragraph line spacing, Word 2007 has a default of line spacing 10pt, this should be set to 0 for the whole document.

Using the Appeals Forms Document:

Go into the Appeals tab.

Open an appeal, at the bottom right corner there is a  Click on the W.

The Add Correspondence Information box will come up.

Type – is a required field. Click on the down arrow and select from the setup types.

Question: What if the type is not listed? Then it is not set up in the System Codes, Appeals, Appeal Document Type needs to be added

Created Date – The date the form is created (recorded on the Appeal Documents Correspondence and Form, see below)

Mail date - The date this form will be mailed out. (recorded on the Appeal Documents Correspondence and Form, see below)

Details/Reason – Any documentation needed for the form. (recorded on the Appeal Documents Correspondence and Form, see below)

Correspondence and Forms			
Correspondence Type	Create Date	Mail Date	Mailing Detail / Reason
Appeal Forms & Tokens - TESTING	03/25/2009	03/27/2009	Testing tokens

Creating other types of forms

Everything is the same as the Appeal Form except

Maintain Your Forms

- Transfer/Sale Forms
- Transfers Forms
- Appeals Forms
- Assessment Notices Forms
- Property Forms
- Appeal Notices Forms

Group Appeal Forms

The diagram shows a central box titled "Maintain Your Forms" containing a list of form types. Two callout boxes point to "Transfers Forms" (labeled "Transfer/Sale Forms") and "Appeal Notices Forms" (labeled "Group Appeal Forms").

The steps are the same for creating the group documents.

Categorize Your Forms

- Transfer Forms Types
- Transfers Document Types
- Appeals Document Types
- Assessment Notices Document Types
- Property Document Types
- Appeal Notices Document Types

Group Forms Types

The diagram shows a central box titled "Categorize Your Forms" containing a list of document types. Two callout boxes point to "Transfers Document Types" (labeled "Transfer Forms Types") and "Appeal Notices Document Types" (labeled "Group Forms Types").

Editing a Forms Template.

Go to the Forms & Documents menu located at Activities/Forms & Documents.
Manage Forms Menu

D Manage Forms

In The Matter Of
Document Setup

Document Codes
Document Groups

Maintain Your Forms

- Transfers Forms**
- Appeals Forms**
- Assessment Notices Forms**
- Property Forms**
- Appeal Notices Forms**

Categorize Your Forms

- Transfers Document Types**
- Appeals Document Types**
- Assessment Notices Document Types**
- Property Document Types**
- Appeal Notices Document Types**

Callouts:

- Transfers Forms: Edit a Transfers Form (from the Transfers Tab)
- Appeals Forms: Edit an Appeals Form (from the Appeals Tab)
- Appeal Notices Forms: Edit an existing Group Appeals Form

Click directly on the **W** to load the document template.

D Maintain Documents Appraisal Launch

Current Location: Appraisal

Document Values

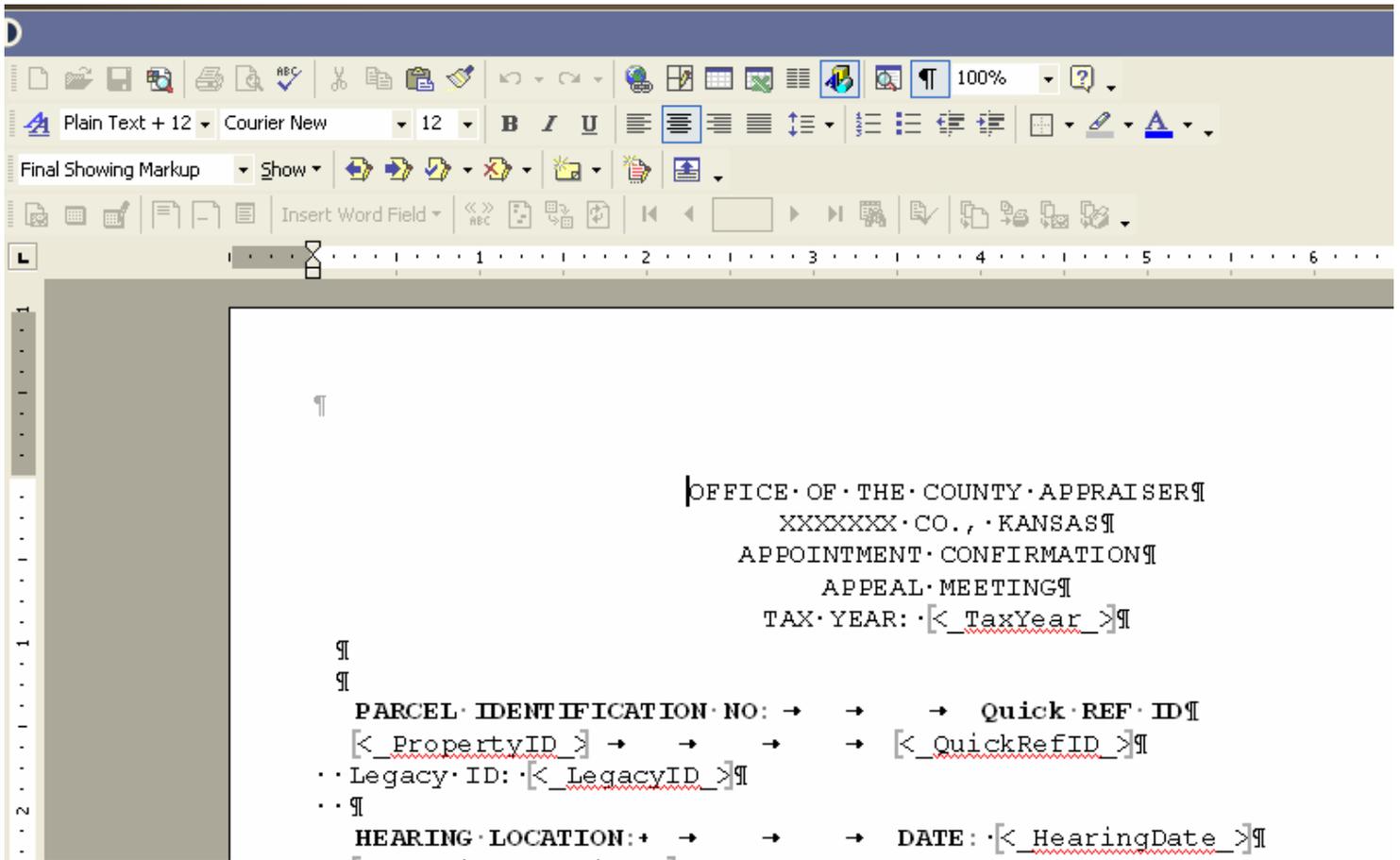
Show Hidden Documents
 Show Obsolete Documents
 Show Document Versions

Sort: Name

Info	Name	Type	Owner
GRP Confirmation Letter		Confirmation Letter	alice anderson
W	05/21/2007 Confirmation Letter used thru the GROUP Option		
GRP Notification of Results Letter		Group Notification of Results	alice anderson
W	04/30/2007 Notification of Results - Final Letter		

Callout: Click to bring up the form.

Make any changes that are needed. Sometimes it looks good when you are in edit mode, but when you actually execute the form, the format changes due to the printer, so it sometimes takes a few tries to tweak the form..



Make sure you Save if you want to save changes made.

If you totally don't like the changes, Exit the form and nothing is saved.

