New Manage Auto Text Feature and Personal Dropdown Lists

There is new functionality and a new look for managing auto text (dot phrases).

You will now be able to add a dropdown list within dot phrases.

This document will give you the step-by-step process to add this feature to your personal dot phrases. If you need dropdowns added to a system phrase (to be available to other people) you must submit an enhancement request.

You can access the auto text manager via the same icon located throughout the chart including Dyn Doc, Notes, Message Center, and the Workflow Summary text boxes.

Once you click on the icon, this is the new view:

1. **My Phrases** – Default opens to this tab, which displays a list of all your personal phrases.
2. **Public Phrases** – Select this tab to view system wide phrases.
3. Click on **Plus** sign to create a new dot phrase.
4. Search field – enter key words to narrow your displayed list.
5. Click on dot phrase to preview on right-hand side with available options – edit, duplicate or delete.
6. Click on **Edit** to display a new window for changes. This is where you will be able to add the new dropdown lists to existing dot phrases.
Adding a Dropdown List

1. By highlighting the text and selecting the **Create Drop List** icon, a window will display to create the new dropdown options.

   ![Create Drop List Window]

   **Note:** highlighted text becomes first (default) item in the dropdown list.
2 Continue building dropdown list by typing into **New List Item** field

3 Click **Add List Item** button between each entry.

4 Continue this process until list is complete, click **Create** to finalize and return to previous screen.
**Adding an Underscore**

There is an alternative option to have a ‘blank default’ so an underscore displays instead of a selection of text. This can be created by checking the **Use Blank Default** checkbox.

When all edits are complete, click **Save**.

**Using a Personal Dropdown List**

Insert dot phrase per current process. The phrase will appear with dropdown sections displayed in **blue** with small arrow.

Click the text/arrow to show dropdowns and make your selection. As you can see below, you can create numerous dropdown lists within a single phrase.