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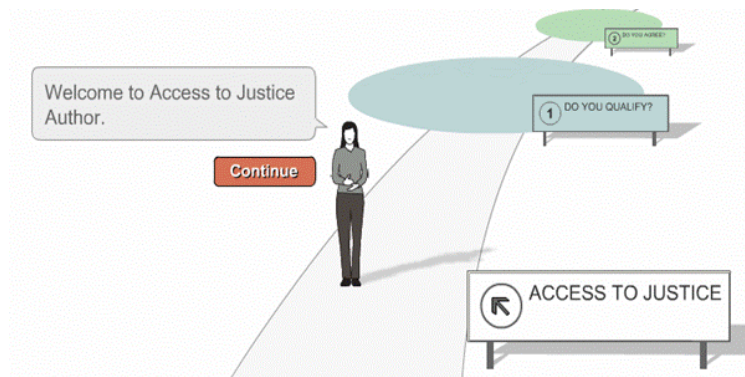
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CHICAGO-KENT COLLEGE OF LAW

Center for Access to Justice & Technology



A2J Authoring Guide



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Introduction to the A2J Authoring Guide

Welcome to the A2J Authoring Guide!

This guide is intended to give visitors, novice authors, and experienced authors basic instructions needed to use the A2J Author[®] software. The Authoring Guide contains 12 chapters, most of which are organized by the features on the main menu's navigation buttons: Interview, Variables, Steps, Questions, Reports, Preview, and Upload. In addition, we have included a brief history and introduction to the software in the introductory chapter, detailed software documentation in Appendix A, frequently asked questions in Appendix D, and much more. The heart of A2J Author[®], and thus the Authoring Guide, however, is creating interview Questions. Therefore, the bulk of the instruction in this manual can be found under the chapter entitled "Creating Questions."

While this guide may not answer all questions regarding the software or creating A2J Guided Interviews[®], it should get you off to a good start. You may visit the A2J Author[®] Community Website for further information and tutorials. The A2J Author[®] Community Website is located at www.a2jauthor.org.

I C O N K E Y	
	Valuable information
	See online tutorial
	Authoring tip

To help you along the way, we have included three icons to identify key points, directions on where to find additional online tutorials, and tips on authoring A2J Guided Interviews[®]. Key points and valuable information in each chapter are marked with the open folder icon. Wherever additional online material is relevant, you will find the computer icon accompanied by a link to online material. The keyboard icon signals authoring tips.

Finally, the A2J Authoring Guide is a living document and we expect to make changes as the tool develops and need arises. So please check the Community Website periodically to make sure you have the most current version – the version number is indicated on the front cover of the A2J Authoring Guide. Revisions of the A2J Authoring Guide will be available as both a separate downloadable .pdf document or as one of the many files included in the "Starter Kit" download. (To learn more about the A2J Author[®] "Starter Kit" please visit the Community Website (www.a2jauthor.org).

We hope you have lots of fun authoring A2J Guided Interviews[®]!

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A2J Author[®] Overview

Welcome to A2J Author[®]!

A2J Author[®]¹ is a software tool that delivers greater access to justice for self-represented litigants by enabling non-technical authors from the courts, clerk's offices, legal services programs, and website editors rapidly to build and implement customer friendly web-based interfaces for document assembly. The A2J Guided Interviews[®] created with A2J Author[®] remove many of the barriers faced by self-represented litigants, allowing them easily to complete court documents that are ready to be filed with the court system.

A Brief History

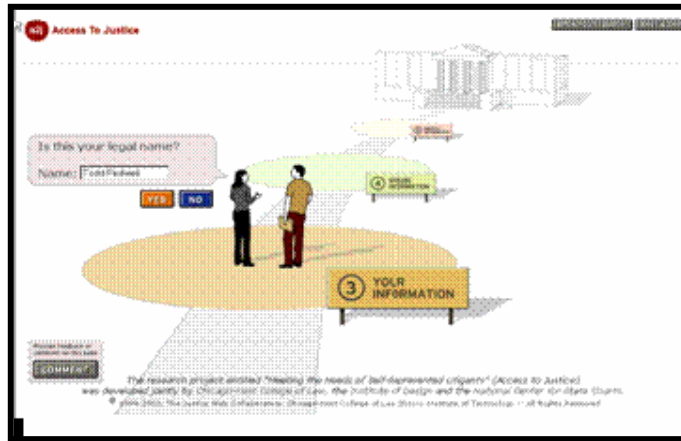
From 1999-2001, the Access to Justice, Meeting the Needs of Self-Represented Litigants: A Consumer Based Approach ("Meeting the Needs") Project² successfully identified the major barriers to access to justice for self-represented litigants. A key insight of the Meeting the Needs Project was that the simple act of filling out forms raises unique challenges that the many low income self-represented litigants have trouble overcoming. The project also determined that special care would be required if technology were to be introduced into the justice system to meet the needs of self-represented litigants.

These findings led to the creation of the Illinois Joint Simplified Dissolution of Marriage Prototype ("JSDM Prototype") (see Figure 1). This prototype was custom-designed software that provided a web-based interface for *pro se* litigants to complete the forms required for a joint simplified dissolution of marriage in Illinois. The JSDM Prototype interface has been tested by users from the Illinois statewide legal services website (www.IllinoisLegalAid.org) and evaluated by user interface specialists at the

¹ A2J Author[®] was developed under grants from the State Justice Institute (SJI grant number SJI-04-N-121), Chicago Kent College of Law, Center for Computer-Assisted Legal Instruction (CALI), Center for Access to the Courts through Technology, and Legal Services Corporation (LSC). The points of view expressed are those of the authors and do not necessarily represent the official position or policies of the SJI, Center for Access to the Courts through Technology, Chicago-Kent, CALI, or the LSC.

² The *Meeting the Needs of Self Represented Litigants: A consumer based approach* was a study completed by the National Center for State Courts (NCSC), and the Illinois Institute of Technology's Chicago-Kent College of Law and the Institute of Design, and was funded by grants from the State Justice Institute (SJI-00-N-248), the Open Society Institute (No. 20001562), the Center for Access to the Courts through Technology, and the Illinois Institute of Technology.

Illinois Institute of Technology Usability Lab. The user interface developed for the JSDM Prototype is elegant, simple and powerfully effective – it is the “front-end” needed to make court document assembly and electronic filing more widely accessible to self-represented litigants. Though the JSDM Prototype proved to be a powerful tool, creating a customized user interview was time consuming and costly.



In 2004 Chicago-Kent College of Law’s Center for Access to Justice and Technology partnered with the Center for Computer-Assisted Legal Instruction (“CALI”) to create A2J Author® - a factory or a software machine to make hundreds of these front-ends for court forms, at a very low cost.

Figure 1: JSDM Prototype

A2J Author® capitalizes on the front-end interface developed in the JSDM Prototype, while providing enhanced functionality that allows authors to create guided interviews on their own. A2J Author® includes a desktop authoring tool and a web-based player that combine to enable rapid, low cost construction of customer friendly interfaces for web-based guided data collection and document assembly without the need of a professional software developer. These A2J Guided Interviews® gently lead unsophisticated end users through a web-based interview with visual and audio cues.

In addition to being user friendly for the consumer, A2J Author® is also designed to make it easy (perhaps *fun*) for court staff and public interest lawyers to create A2J Guided Interviews® with little technical assistance or training. A2J Author® includes a graphical flowchart map that displays the entire dialogue for the interview to the author to facilitate complex branching (see Figure 2).

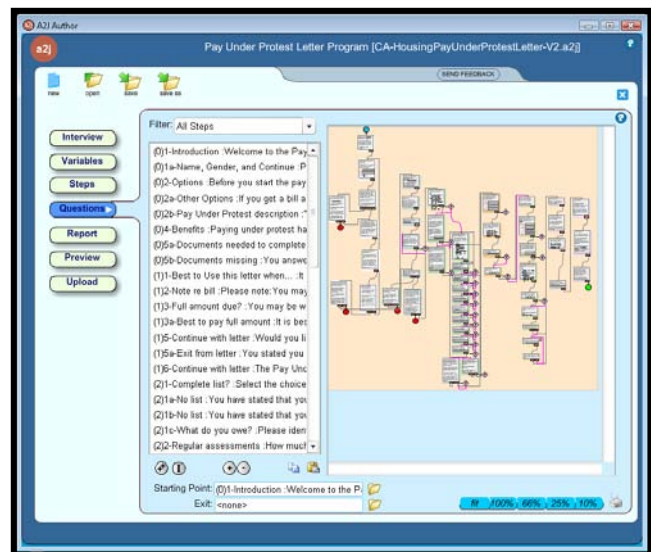


Figure 2: A2J Author® Flowchart view

The “branching” feature lets the author create a dialogue that assists the end-user (self-represented litigants) by asking only the questions that need to be answered.

A2J Author[®], HotDocs[®] and the “National Server”

Much of the success of the A2J Author[®] stems from its compatibility with the Law Help Interactive server (“LHI” and formerly known as National Public Automated Documents Online) Server for nonprofit legal services. The LHI server provides internet-based document assembly services powered by the HotDocs[®] software owned by Capsoft. After an A2J Guided Interview[™] is created, it is then uploaded to the LHI server and combined with its corresponding HotDocs[®] form template to create an interactive interview for court forms. The HotDocs[®] template is a digital representation of a blank court form that allows information collected by the A2J Guided Interviews[®] to be manipulated and inserted in the proper position on that form.

A2J Guided Interviews[®] are made available over the internet through court and statewide websites. The “front-end” software, A2J Author[®], developed by Chicago-Kent and CALI, joined with the “back-end” technologies of the LHI server, Capsoft’s HotDocs[®] and LHI management tools, provide a full end-to-end solution (see Figure 3). This combined effort makes it possible to provide user-friendly assistance to thousands of self-represented litigants in a rapid and cost effective manner and make the help available wherever there is internet access.

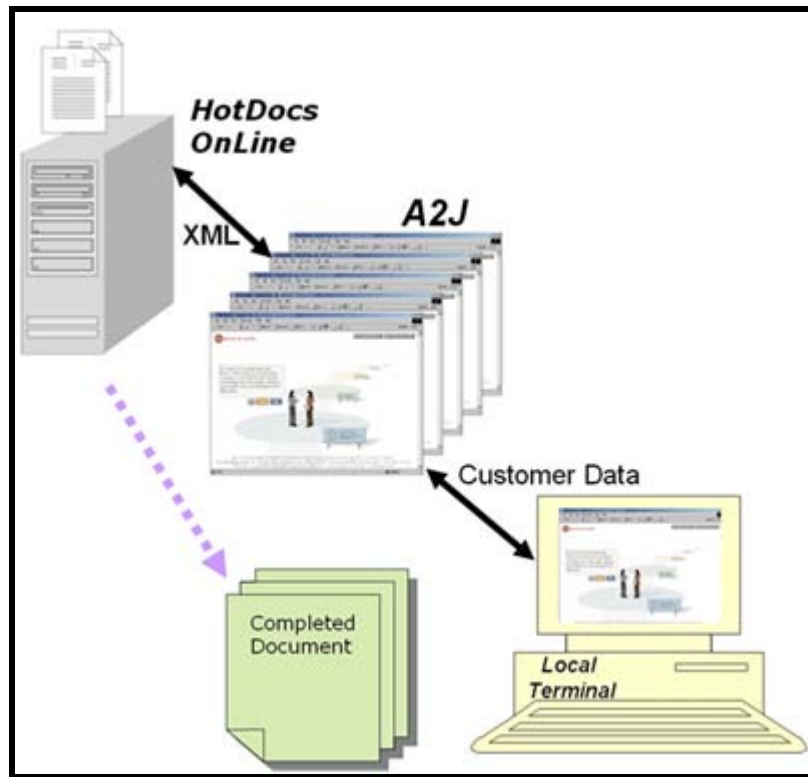


Figure 3: A2J Author[®] Output Information Flow

Demonstrated Capabilities

Early, in 2005, the Center for Access to Justice & Technology demonstrated A2J Author[®]'s capabilities by building A2J Guided Interviews[®] for the project's pilot partners in Illinois (Illinois Legal Aid Online and the Cook County Courts) and in California (California Administrative Office of the Courts). The Illinois A2J Guided Interviews[®] include "Security Deposit Complaint" interviews for tenants and an "Application for Waiver of Court Fees and Costs." In addition, three California A2J Guided Interviews[®] were built in partnership with the California AOC to demonstrate A2J capabilities, including: "Petition for Adult Name Change," "Application for Waiver of Court Fees and Costs," and an "Application for an Order for Service of Summons by Posting and Mailing."

Since the first production release of A2J Author[®] in September 2005, legal aid offices and courts in a variety of states have begun using the A2J Author[®] tool on their own. For example, Idaho Legal Aid Services, Inc., as of late 2007, had completed twenty-nine (29) of A2J Guided Interviews[®] including, divorce, landlord/tenant, name change and small claims packets. Idaho's A2J Guided Interviews[®] received over 58,000 hits in September 2007 alone.

Illinois Legal Aid Online has used A2J Author[®] to create a "Post Judgment Collections Guide" that guides users through the process of collecting court judgments, and an "Expungements" Guided Interview that is used in connection with an expungement help desk in Chicago's Cook County courthouse. As of March 2010, thirty-six (36) A2J Guided Interviews[®] were available to the public on Illinois Legal Aid Online's Forms Library.

A2J Author[®] is gaining users and supporters daily and is steadily becoming a nationally recognized tool to meet the needs of low-income and self-represented litigants. For example, sixty (60) percent of the over \$2.1 million awarded to State Justice Institute and Legal Services Corporation partner grants announced in September 2007 include funding for A2J Author[®] projects. These grants positioned 2008 to be a banner year for A2J Author[®] as Georgia, Idaho, Iowa, Kentucky, Maine, New York, Ohio, Washington, and West Virginia each begin new A2J Guided Interview[™] projects.

Case Management and E-Filing Integration

Chicago-Kent and CALI continue to make improvements and enhance the functionality of A2J Author[®] based on feedback from the A2J Author[®] user community. These enhancements include integration with e-filing and case management systems.

The A2J Author[®] project team has partnered with the U.S. District Court of Eastern Missouri to make A2J Guided Interviews[®] the *pro se* front-end to the U.S. Courts' Case Management/Electronic Case Files (CM/ECF) system (see Figure 4.) Once completed, the A2J Guided Interview[™] and e-filing integrated technology will be made readily available to all other U.S. Courts interested in similar *pro se* interface projects. Iowa Legal Aid has recently completed a pilot project that integrates A2J Guided

Interviews[®] with the Pika case management system used in a large number of legal aid offices across the country.

Currently, Legal Aid of Western Ohio is spearheading a replication of the Iowa project in the state of Ohio that will coordinate online intake among all participating programs in the state, using A2J Guided Interviews[®] as the online interface.

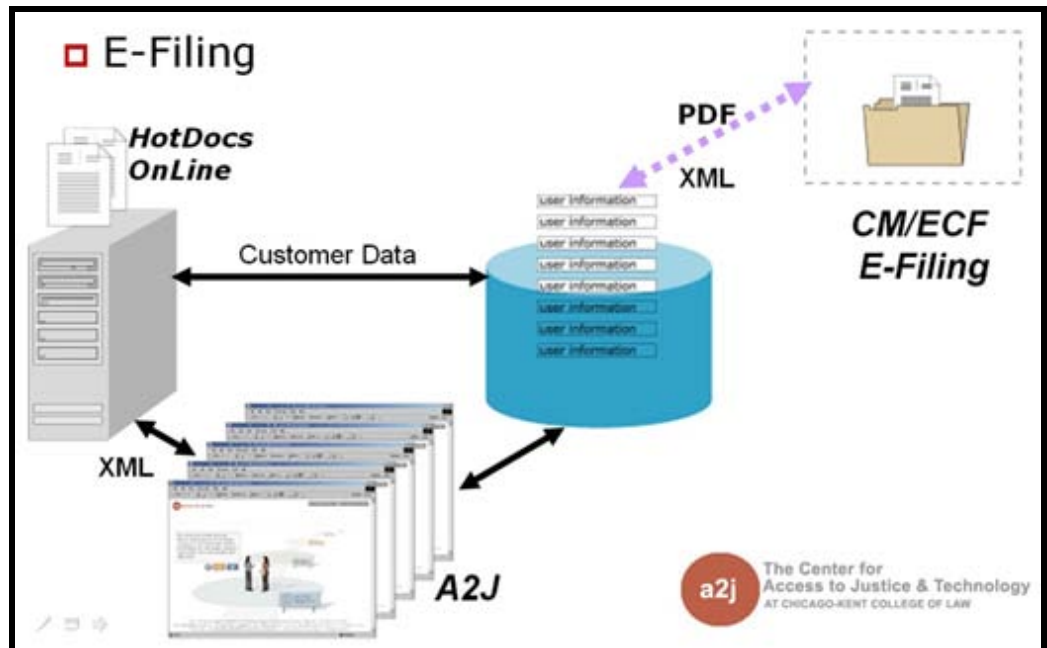


Figure 4: E-Filing Data Flow Model

Version 2.0

Several enhancements, many of which were suggested by A2J Author[®] users, were incorporated into Version 2.0, released in 2008. While some of the improvements in 2.0 faced the *pro se* users of the A2J Guided Interviews[®], most of the improvements were aimed at enhancing functionality that made the tool more efficient and easier for the authoring community to use.

For the authors of A2J Guided Interviews[®], increased functionality included the ability to: set multiple variables in a single condition; round and truncate numbers; script macros for sign text and field labels; script functions in either lowercase or uppercase letters; add unlinked questions to an interview; add or insert automatically numbered questions without disturbing the existing numbering scheme; and, for replicated interviews, clear all audio file references if they do not apply to the current interview. This version also made it much easier to move between screens in the program. Many other fixes and formatting changes were also made that make the authoring of A2J Guided Interviews[®] more efficient for developers. (See Appendix A: Software Documentation.)

Developers were also able to sort text and number lists making selection from a multiple choice list easier for the *pro se* user. Another 2.0 feature aimed at the user was an alternative end graphic. This feature provided the developer the ability to exchange the traditional courthouse graphic for an alternative graphic designated by the author. With the increasing popularity of the program as a means to conduct online web intake, programs could now designate a graphic more in tune with the purpose of the interview.

In addition, as part of the A2J Author[®] 2.0 project A2J Guided Interviews[®] could be integrated with “live help” vis-à-vis a Live Help selection mechanism which was incorporated on the National Server. Live Help functionality was enabled as a “wrap-around” interface to any A2J Guided Interview[™] associated with a program currently using LiveHelp. Adding Live Help allows *pro se* litigants to get personalized help during their A2J experience.

Finally, the A2J Author[®] 2.0 project generated an XSL Transform for LXML. Initially tested by Iowa Legal Aid, and now available on the Community Website, this tool allows A2J Author[®] to more easily “plug into” electronic filing systems and legal aid case dockets, making A2J Guided Interviews[®] the standard interface for *pro se* information collection (see Figure 5.)

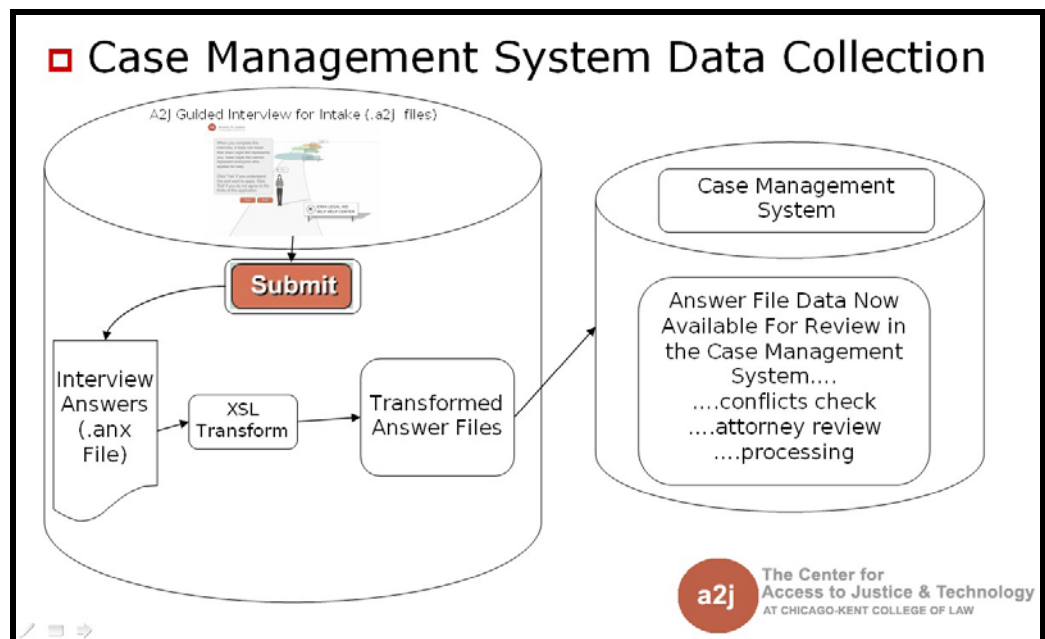


Figure 5: Data Transform Flow for Case Management Systems

Version 3.0

Released in early 2010, the upgrades in 3.0 improve both the end-user experience and the A2J Guided Interviews[®] authoring process. The most significant enhancement is the ability for A2J Guided Interview[™] authors to add video or graphics components

to questions. This is an especially useful tool to further explain or model complex issues for A2J Author[®] users.

Enhancements to A2J Author[®] 3.0 offer users a variety of program possibilities, including:

- the ability to add graphics and video components to guided interview questions with the option of creating full-screen visual display for viewer satisfaction and ease;
- graphic and view options that allow users to give their clients visual explanations of the more complicated court forms, procedures, processes, etc.;
- an exit feature which enables users to customize the interview exit process and instructions with the option of leaving guided interviews before they are completed and saving the answers on the national server;
- the ability to create new interviews more efficiently by adapting previously designed questions or question sets and their underlying data components from existing A2J Guided Interviews[®]; and
- visual consistency as they navigate between their site, A2J Guided Interviews[®] and the interview host site with the capability to create and add a “branding logo” to the A2J Guided Interviews[®] interface.

Version 4.0

Released in December 2010, the upgrades in A2J Author[®] 4.0 focus on improving the interview experience for the end-user. Some additions are “senior-focused” including the ability for the end-user to control the font size and sound volume. Version 4.0 also incorporated several new features as well as improvements upon existing features, including:

- Audio/Video Start/Stop/Rewind: In addition to having control over the volume of audio and video clips, end users may now stop, start and rewind the clips. Additionally the audio/video control box includes an indicator of how long the audio or video clip is and how much of the clip is left while playing. These features will greatly benefit end-users with hearing impairments and limited literacy.
- Calculator: Authors of A2J Guided Interviews[®] may now choose to have a graphical calculator widget appear with any number or dollar field. When the end-user clicks the calculator icon a larger fully-functioning calculator pops up. The calculator feature helps ensure accuracy and makes it easier and more efficient for the end-user to complete questions.

- **Calendar:** Similar to the calculator, authors of A2J Guided Interviews® may choose to include a graphical calendar widget with any date field. When an end-user selects a date on the calendar, the chosen date automatically populates the date answer field in the question box. The calendar feature helps ensure accuracy and makes it easier and more efficient for the end-user to complete questions.
- **Enhanced Save & Resume:** With A2J Author® 3.0 end users gained the ability to save a partially answered interview and return at a later time to complete it. With A2J Author® 4.0 when an end-user launches an interview with a saved answer set they will begin on the question where they exited from.

What's Next?

Chicago-Kent and its partners, CALI and Idaho Legal Aid Services, Inc., receive continued funding to grow the innovative A2J Author® Project. During 2011, our project team will work to research options for sustaining the A2J Author® project into the future and determine the focus for the next major iteration of the software. Interim versions providing bug fixes and incorporating minor enhancements requested by the community will be released on a periodic basis. Finally, the current project provides for a tremendous increase in support for the community in both training and development assistance. Monthly online trainings and workshops for new users, advanced users, and users focused on online intake will support the efforts of programs nationwide.

A2J Author® is available for free to interested courts, legal service organizations and members of the legal services HotDocs® development community for non-commercial use. A2J Author® is made possible by funding from the State Justice Institute, Center for Access to the Courts through Technology, Chicago-Kent College of Law, CALI and the Legal Services Corporation. If you are interested in learning more about A2J Author® solutions for e-filing or case management system integration, please call the Center for Access to Justice & Technology for further information.

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Installation & Registration

*The latest version of A2J Author[®] is available on
www.a2jauthor.org!*

Downloading the software is always the crucial first step! Downloading and registering the software is simple to do and we have provided simple instruction below.

Installation Requirements and Instructions

Listed below are the Viewer Requirements, Author Requirements, and Installation Instructions.

Viewer Requirements (for litigant access)

- A web browser: Internet Explorer 6 or greater; or Firefox 1.1 or greater, or Netscape 7.0 or greater.
- Flash 8 or greater

Author Requirements (for desktop interview creation)

- Windows[®] 2000, Windows[®] XP or Windows[®] 7
- The new A2J Author[®] uploader feature which expands the upload capacity of A2J Author[®] (see Chapter 10) uses the .NET framework. Thus, you must also have the .NET framework installed. The most current download for .NET can be found on the Microsoft[®] Download Center website (<http://www.microsoft.com/downloads/en/default.aspx>).
- Flash 8 or greater (Be sure to install Flash from both your Internet Explorer and Firefox browsers, if you use Firefox.)



There is no Macintosh version of the Authoring system. However, if you are operating Windows® XP on a Mac, you can operate A2J Author® using the Windows® operating system.

Installation Instructions

1. Go to the A2J Author® Community Website: www.a2jauthor.org.
2. Select the “Download A2J Author 4.0” link from the All Users menu (Figure 6).



Figure 6: A2J Author Community Website.

3. Select “Install A2J Author® (Version 4.0)” link from the Downloads page (Figure 7).

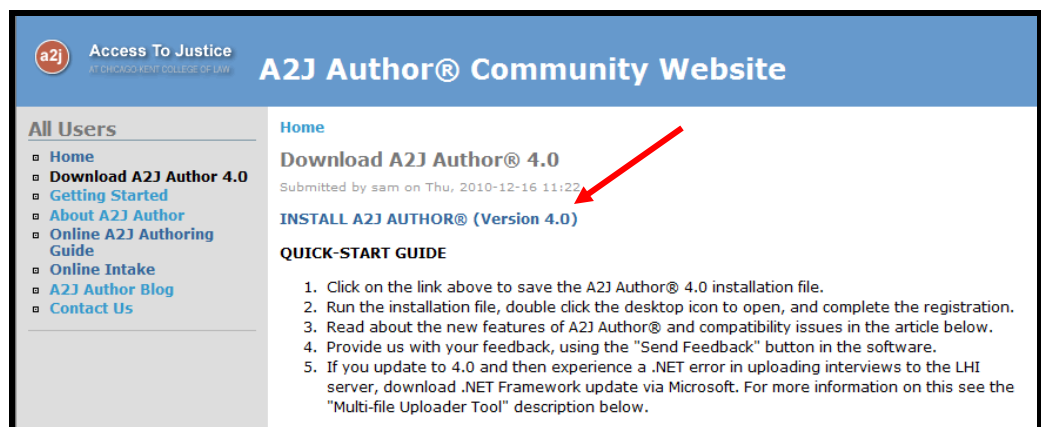


Figure 7: A2J Author Download link on the Community Website.

4. Save the .exe installer file (Figure 8). Then “run” or “open” the .exe file to begin the installation.

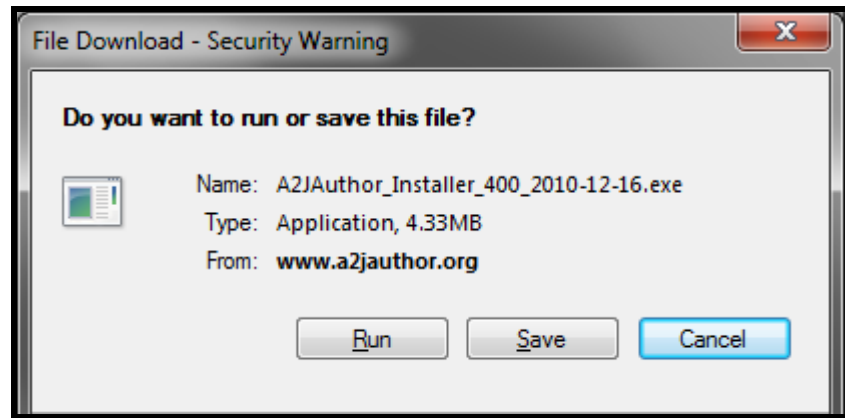


Figure 8: File Download window.

5. Select “Next” to continue through the InstallShield Wizard for A2J Author[®] (Figure 9).

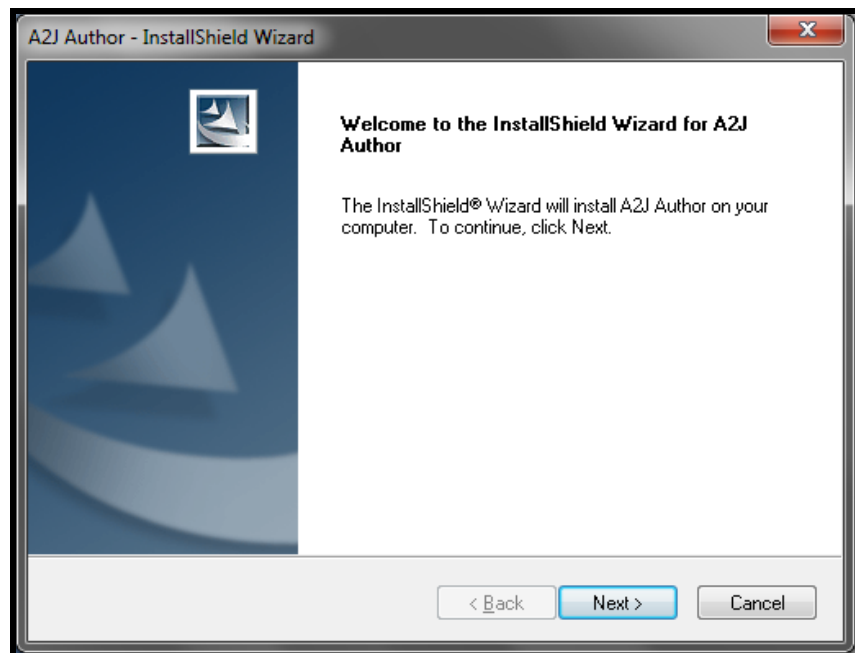


Figure 9: InstallShield Wizard.

6. Select “Next” again to continue through the installer and then complete the installation by selecting “Install” (Figure 10 and Figure 11).

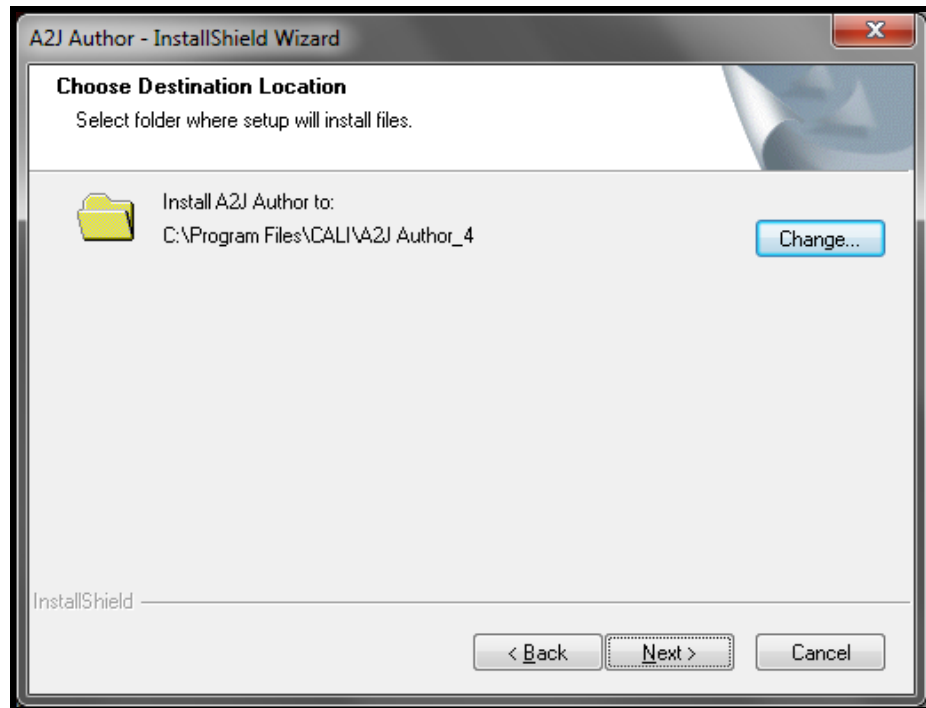


Figure 10: A2J Author – InstallShield Wizard.

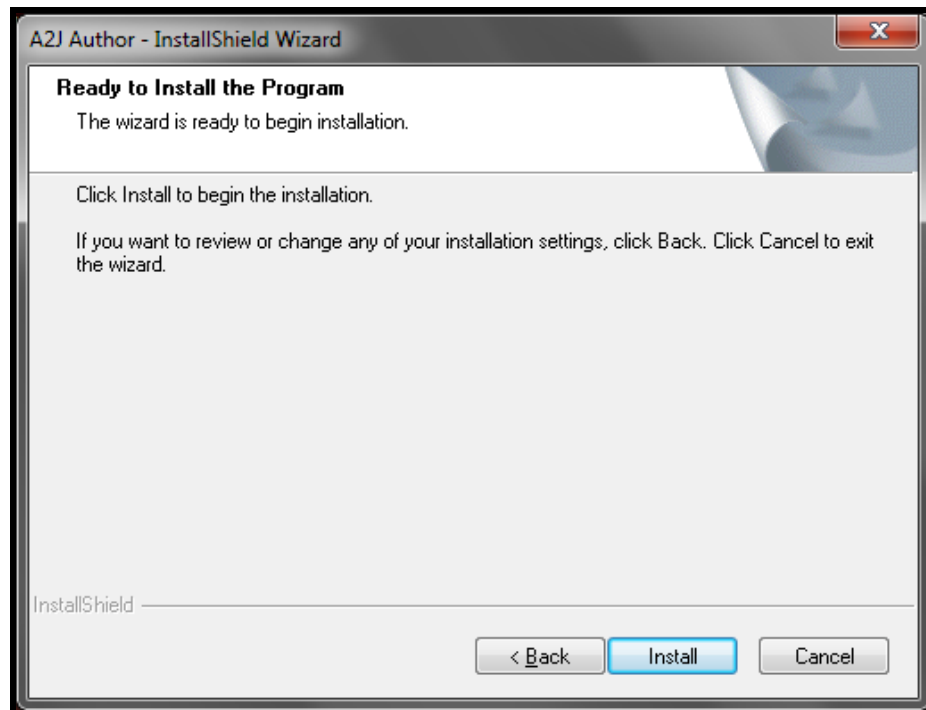


Figure 11: A2J Author InstallShield Wizard.

7. Click on the “Finish” button (Figure 12).

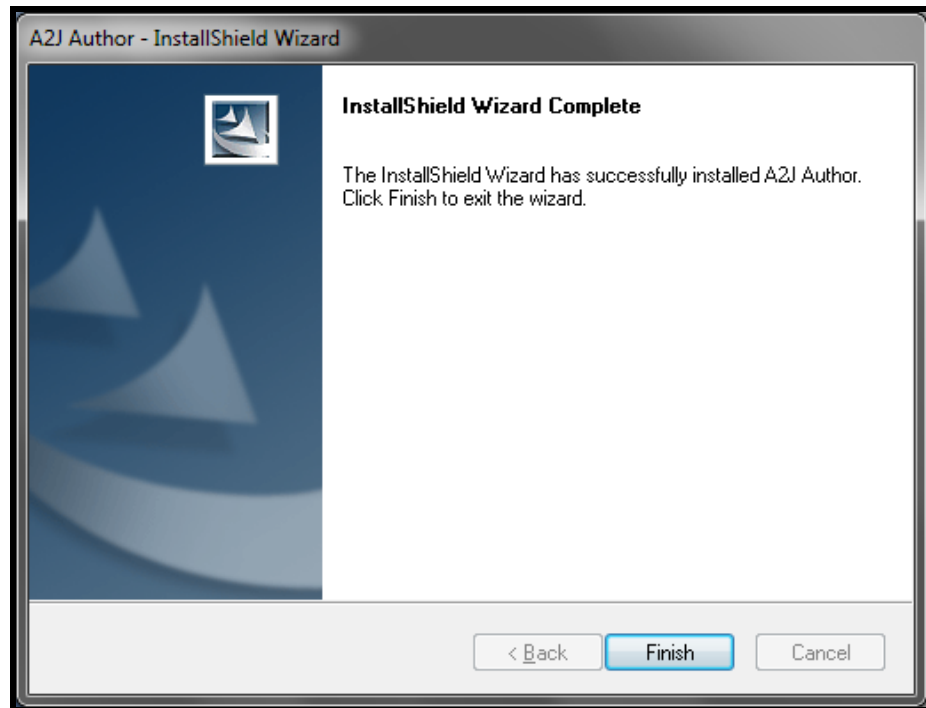


Figure 12: Finish Button in the InstallShield Wizard.

8. Your software is now installed. An A2J Author[®] icon should appear on your desktop (Figure 13).



Figure 13: A2J Author[®] icon that should appear on your desktop.

Registration Requirements and Instructions

A2J Author[®] is available at no cost to courts, legal aid organizations, and others who wish to use the software for a non-profit use. After downloading and opening the software using the desktop icon, you will have an opportunity to read the Access to Justice Author End User License Agreement. You will then be required to register the software by accepting the terms and conditions of the software license and completing a registration screen prior to initial use.

Registration Instructions

1. To register the software, double-click on the A2J Author[®] icon on your desktop (Figure 13, above).
2. Read the Access to Justice End User License Agreement; print the License, if desired; and select “I Accept,” if you accept the terms and conditions of the License Agreement (Figure 14).
3. Select “Next” to continue with registration.

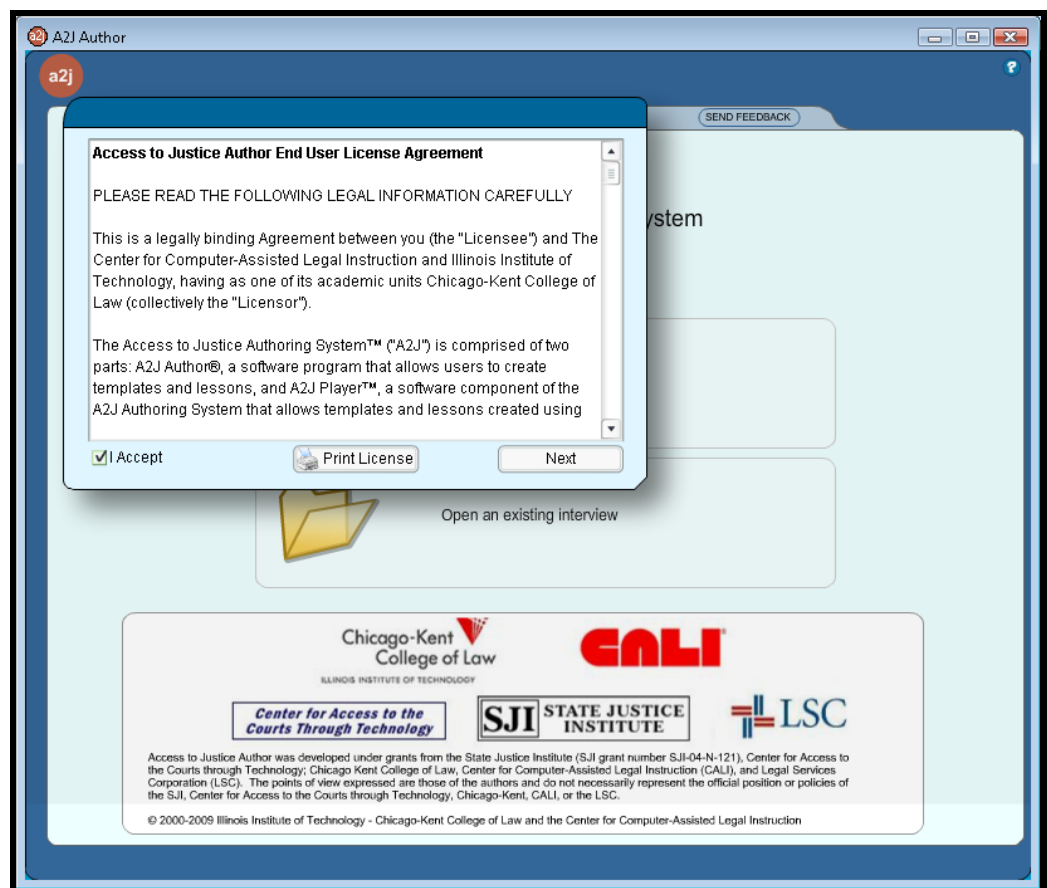


Figure 14: Terms and Conditions must be accepted in order to register the software.

4. Complete the required registration information indicated by asterisks (Figure 15).
5. Click on Register.
6. The software is now registered. Future uses of the software will not require you to accept the license and complete registration information.

The screenshot shows a registration form for the A2J Author system. The form is titled 'a2j' and contains the following fields:

- Name* (John Doe)
- Title*
- Organization* (Legal Aid Organization of
- Address Line 1*
- Address Line 2*
- City*/State*/Zip* (Three separate input fields)
- Email*
- Phone* (Two separate input fields for Phone and Fax)

A legend indicates that fields marked with an asterisk (*) are required. A 'Register' button is located at the bottom right of the form. The background of the page includes a 'SEND FEEDBACK' button, a 'Open an existing interview' button, and logos for the following organizations:

- Chicago-Kent College of Law (ILLINOIS INSTITUTE OF TECHNOLOGY)
- CALI
- Center for Access to the Courts Through Technology
- SJI STATE JUSTICE INSTITUTE
- LSC

At the bottom of the page, there is a copyright notice: © 2000-2007 Illinois Institute of Technology - Chicago-Kent College of Law and the Center for Computer-Assisted Legal Instruction.

Figure 15: Complete the required registration information and select Register.

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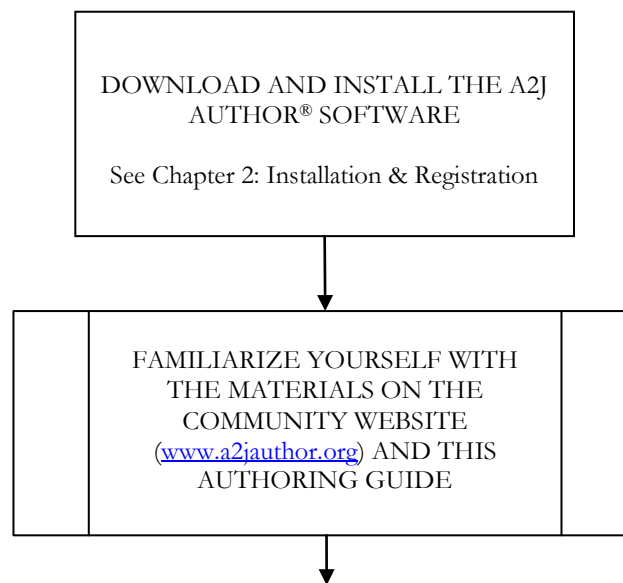
Getting Started

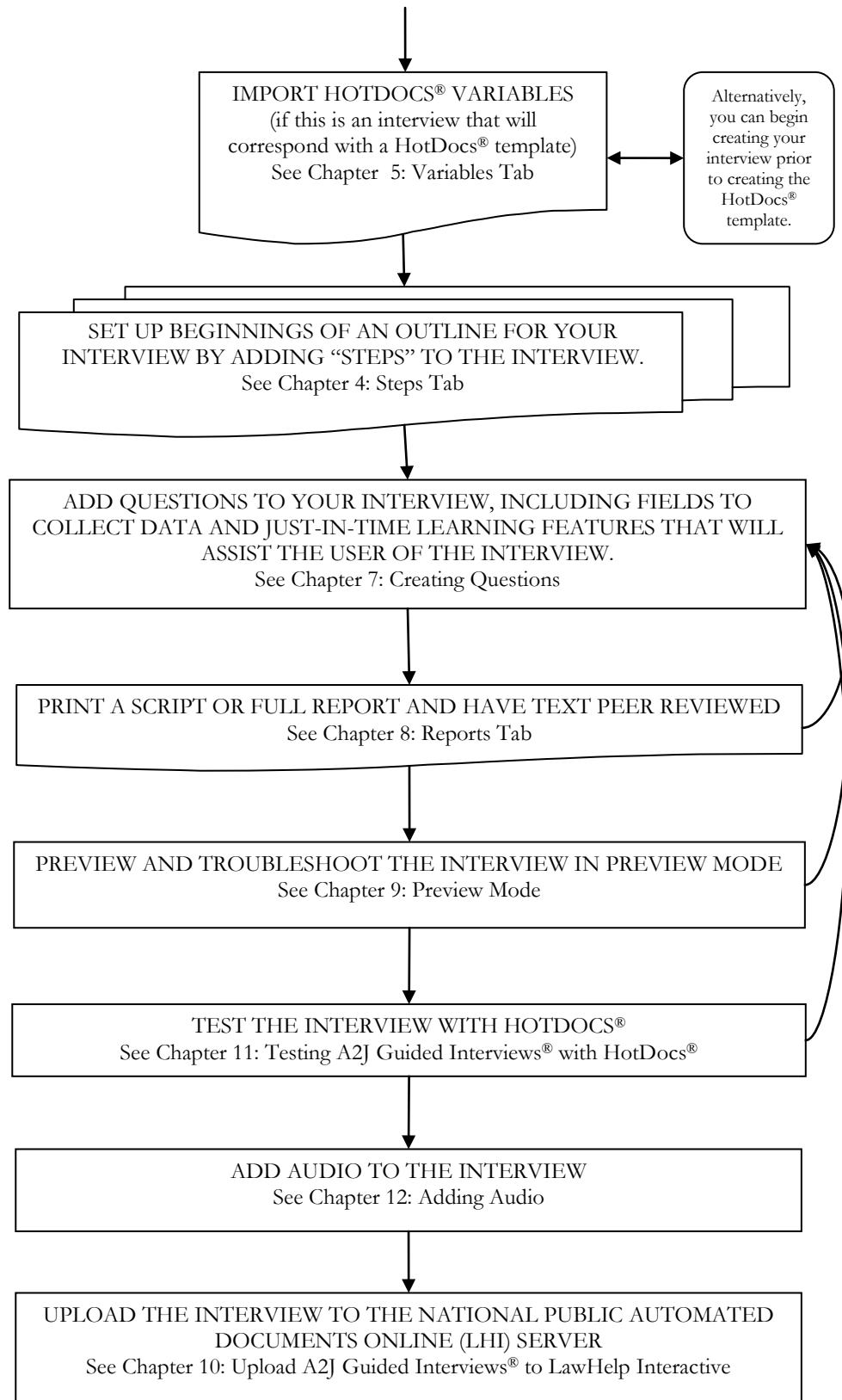
After reviewing this chapter you'll be well on your way to authoring.

Getting started in A2J Author[®] is easy! This first section of this chapter, entitled *Creating Interviews*, provides a bird's eye view of the entire process of interview creation, from downloading the software to uploading the completed interview to the LawHelp Interactive (LHI) Server. The process is demonstrated using a flowchart. The second section of this chapter, entitled *Navigating A2J Author[®]*, will familiarize you with the start-up screen and main menu of the software.

Creating Interviews

Creating A2J Guided Interviews[®] can be simple – just follow these steps.





Navigating A2J Author®

A roadmap is never complete without signs and landmarks. Thus, this section will walk you through the components of the start-up screen and the main menu. A “map” of the navigation buttons in the main menu, which serves as a visual table of contents, is also included.

The Start-Up Screen and Icons

The Start-Up Screen (Figure 16) includes two obvious features in the center of the screen: “Create a new interview” button and “Open an existing interview” button. The Start-Up Screen also includes a few not-so-obvious features, including the A2J logo which reveals software information, the “?” button which links to the A2J Author® Community Website, and the Send Feedback button.

NEW OR
EXISTING
INTERVIEW?

The “Create a new interview” and “Open an existing interview” buttons are located in the center of the screen. They provide you the ability to either open a new interview which includes four starter questions, or browse your computer’s directories and folders in order to select a previously saved A2J Guided Interview™.

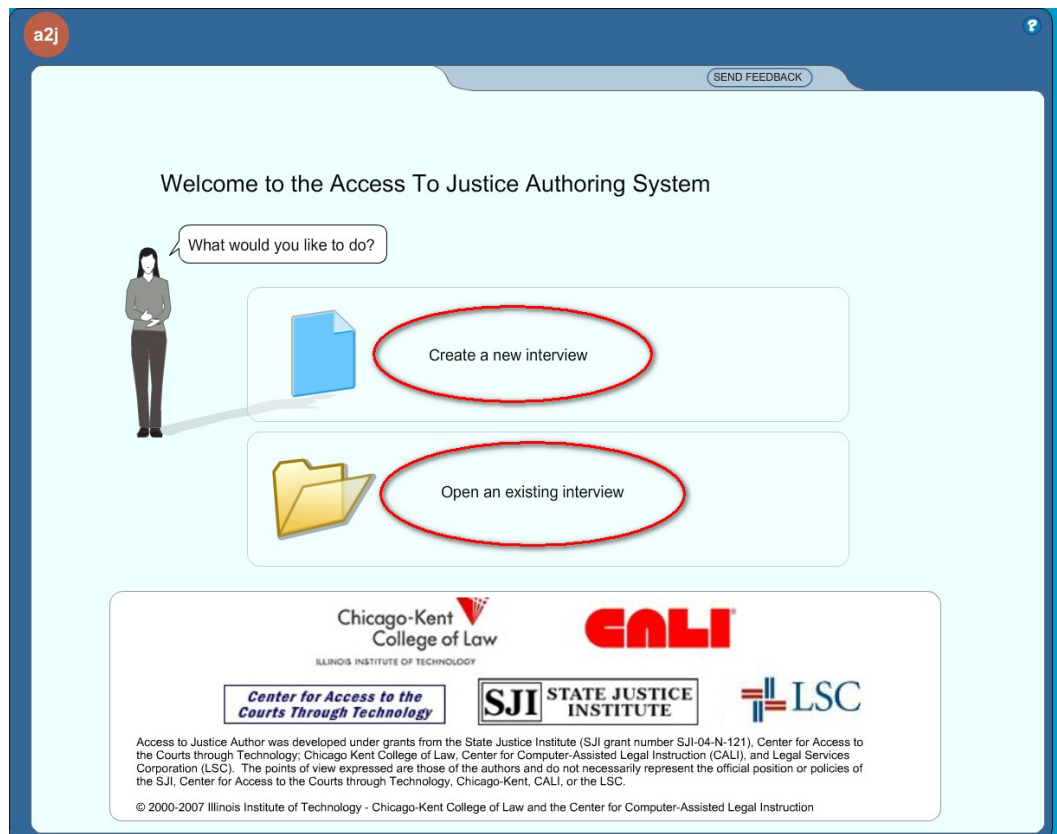


Figure 16: Features of the Start-Up Screen

VERSION,
HELP, AND
SEND
FEEDBACK:




The A2J logo () in the top left-hand corner of the screen and the question mark symbol () in the top right-hand corner of the screen are icons. The version number of the A2J Author[®] software you are operating and other authorship information is available by pressing and holding the left button of your mouse while the mouse is positioned over the A2J logo. The question mark symbol, when selected, will direct you to the online A2J Authoring Guide on the A2J Author[®] Community Website located at www.a2jauthor.org (Figure 17).



Figure 17: The home page for the A2J Author[®] Community Website (www.a2jauthor.org).

The “Send Feedback” button () links you to an Author Feedback Form (Figure 18). Information entered in the Author Feedback Form is forwarded to the software’s developers. Feedback is very important for successful software development, so please do not hesitate to send us your comments. The following options for feedback are provided: “I want to Thank You...”, “I have a suggestion...”, “It would be nice if...”, “How do I...”, “I found an error...”, “I have a Complaint...”, and “Other Feedback”.

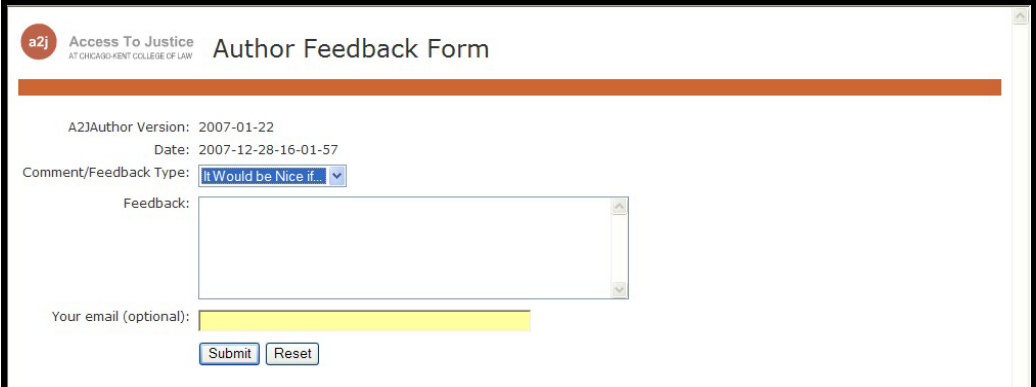


Figure 18: The A2J Author[®] Feedback Form.

The Main Menu

A2J Author[®] has a “main menu” which exists in most screens of the software, and is divided into two parts. The first part consists of four file management icons: “new,” “open,” “save,” and “save as” (Figure 19). The second portion consists of seven navigation buttons: “Interview,” “Variables,” “Steps,” “Question,” “Report,” “Preview,” and “Upload.” Each of these buttons opens up a “tab” or “screen” in the software.

NEW, OPEN,
SAVE, AND
SAVE AS:

The icons new, open, save, and save as, are located at the top of most screens.

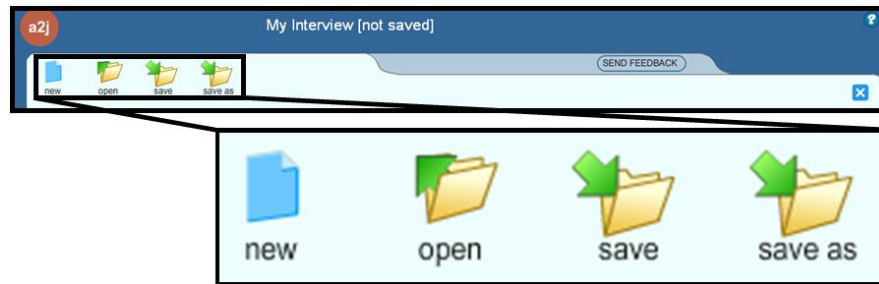


Figure 19: Each “Tab” or “Screen” within A2J Author[®] provides the following button selections: New, Open, Save, and Save As.

NEW - Selecting “new” opens a new template upon which you can build an A2J Guided Interview[™]. If you are working in an existing interview and wish to close it and begin work on a new interview, be sure to select “save” first; then select “new” to clear all fields and begin work in a new template. Selecting “new” does the same thing as returning to the Start-Up Screen and selecting “Create a new interview” (Figure 16).

OPEN - Selecting “open” opens the window entitled “Choose an existing A2J Interview” (Figure 20.)

Here is where you will browse for and select an existing interview. Notice that the browse window is defaulted to search for “.a2j” files. By selecting the “Files of type” drop down menu, you can also search for “.xml” files. (Interviews downloaded from the LHI server are in this format.) Be sure to “save” an interview prior to opening another.

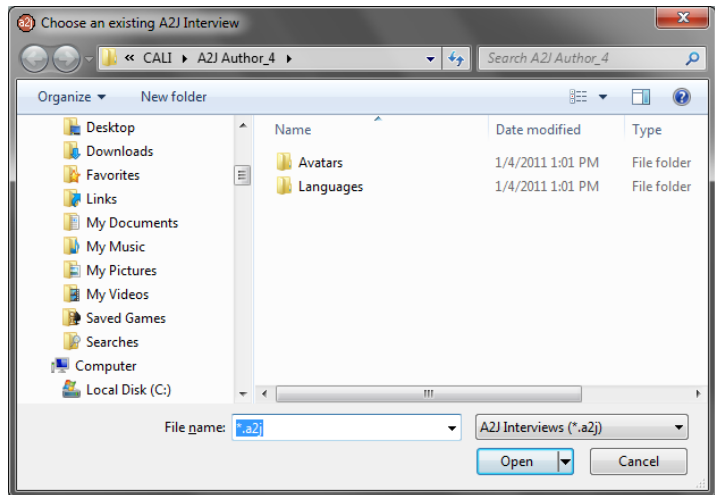


Figure 20: Browse for an existing “.a2j” or “.xml” A2J Guided Interview[™].

SAVE - Selecting “save” will open the “Save your interview as?” window. A default file name (My Interview.a2j) is suggested in the File name field. However, you can use any file name to save the interview. *It is recommended that you do not include apostrophes in the name you choose to save your interview under.* Also, you can save an interview in another folder. Notice in Figure 21 below, the default folder is “CALI\A2J Author_3_4”, which is the program files folder. The folder can be changed by selecting another from the drop down menu. To continue, you must select “save” from the “Save your interview as?” window (Figure 21).

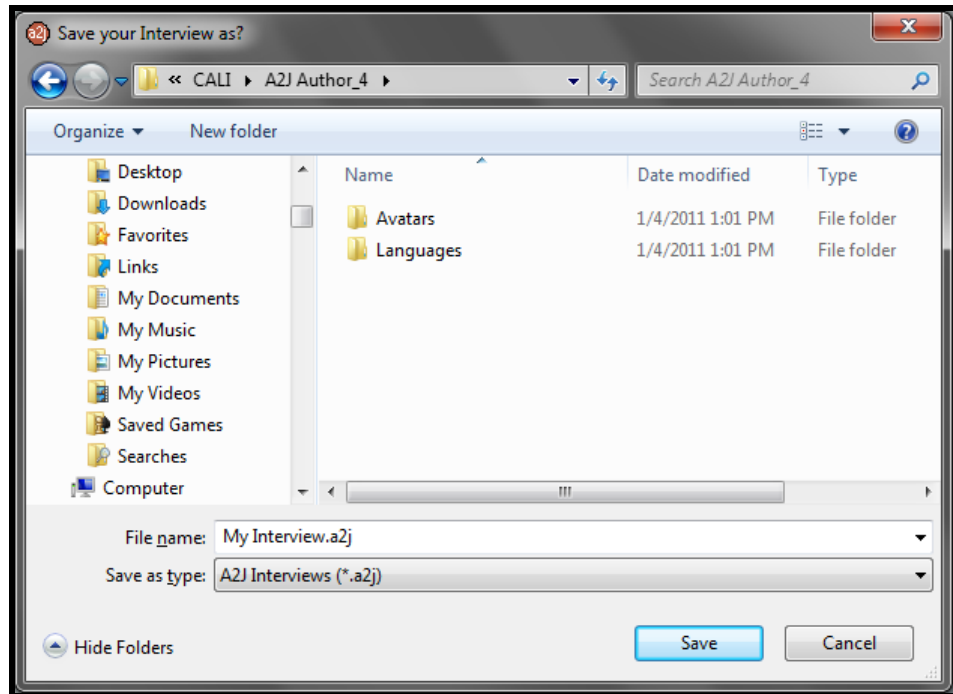


Figure 21: The suggested file name is derived from the “Title”, but can be changed when the file is saved.

Whenever you “save” an A2J Guided Interview™, A2J Author® creates a back-up copy of the interview before it saves the new changes. The old interview is saved under a different file name. A2J Author® appends a date stamp to the file extension of the old interview. Thus, if you wish to discard your current changes and work from the “old” version, you can do so by using the date stamped back-up copy.



It is important to note, however, that A2J Author® will only open files with either an “.a2j” or “.xml” file extension. So, if you wish to resurrect a date stamped back-up of your A2J Guided Interview™, you must change the file name to remove the date stamp from the file extension. Thus, in Figure 22 below, “-2007-12-10-14-38-49” would need to be deleted from the file name, leaving only the “.a2j” extension. To avoid overwriting the latest version of your interview, you may wish to rename the backup file entirely.

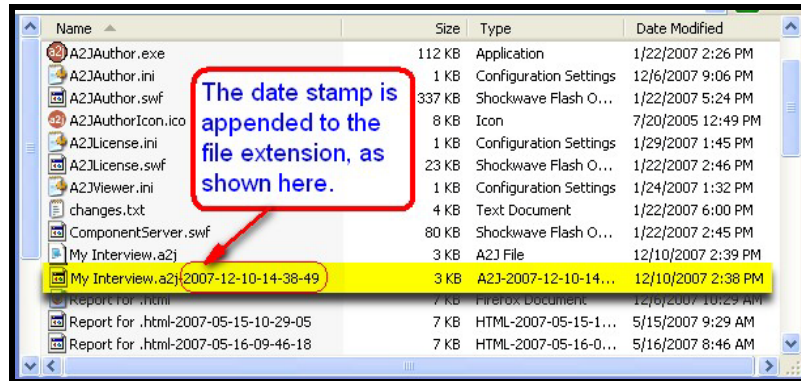


Figure 22: A2J Author® appends a date stamp to the existing A2J Guided Interview™ file, leaving you with a new file and a “backup” of the next previous version, which is date stamped.

SAVE AS - Selecting “save as” allows you to save an existing interview under another file name.

THE
NAVIGATION
BUTTONS:

The seven navigation buttons of the main menu are: “Interview,” “Variables,” “Steps,” “Question,” “Report,” “Preview,” and “Upload” (Figure 23). With the exception of the “Preview” button, each button opens up a corresponding “tab” or “screen” in the same frame (e.g., the Interview Button opens the Interview Tab.) Selecting the “Preview” button, on the other hand, opens up the Preview Mode which features a preview of the interview as the end-user would view it and preview mode features which facilitate troubleshooting.

On the following page, is a visual “map” of the main menu buttons (Figure 24), including a brief description of each tab or screen and the A2J Authoring Guide chapter under which you can find more detailed information.

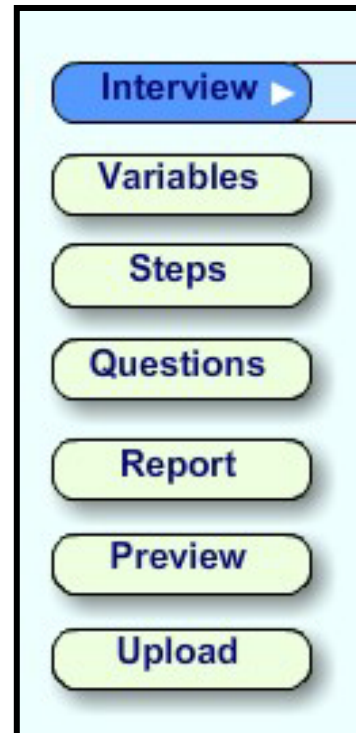


Figure 23: Navigation buttons of the main menu.

Tab Function	Chapter #
Interview	Interview: Add metadata and set language, graphic and other interview preferences.....4
Variables	Variables: Import and manage variable types.....5
Steps	Steps: Break down your interview into logical groupings of questions.....6
Questions	Questions: Design questions, fields, and just-in-time learning features.....7
Report	Report: Print a Full Report or Script for audio to spell-check and troubleshoot.....8
Preview	Preview Mode: Troubleshoot A2J Guided Interviews® while previewing the interview.....9
Upload	Upload: Upload a completed A2J Guided Interview™ to LHI server.....10

Figure 24: Table of Contents for content related to each Navigation Button.

Interview Tab

Set up and keep track of your interview.

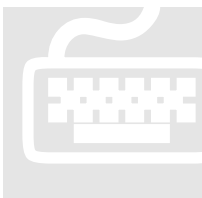
The Interview Tab includes several options for entering basic information about your A2J Guided Interview™. This tab primarily serves as a place where you can keep track of notes regarding the purpose and history of the interview. This screen is also where the following preferences are set: language, avatar color, send feedback, end graphic, and branding logo.

Information About The Interview

The following six fields under the Interview Tab provide opportunities to include informative metadata in your A2J Guided Interview™: Title, Description, Jurisdiction, Author, Version, and History (see Figure 25, next page).

Title

The Title field collects the name of your interview. The default setting for this field is “My Interview.” If you do not change this entry, then “My Interview” will be the suggested file name upon saving the interview. After saving the interview once, the entry in the Title field no longer affects the actual file name.



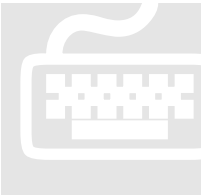
Decide on a naming convention and stick to it. Make the name detailed. Example: “Adult Name Change for Cook County – Draft 01-2008,” “Minor Name Change for DuPage County – Final 02-2008.”

Description

The Description field collects any descriptive information you choose to include for reference. The default setting for this field is “This is a description of my interview.” This information only appears in the Interview tab when the file is open and in any Full Reports generated under the Report tab. Often authors will choose to include information that indicates how other similar interviews are distinguished. For instance, if you have designed two interviews that compile data for Name Change forms, where one is for adult name changes and the other, for minors; then you may wish to include that distinguishing characteristic in the description of your interview.

Jurisdiction

The Jurisdiction field collects descriptive information regarding the jurisdiction addressed by the interview. The default setting for this field is “Jurisdiction of my interview.” Similar to the Description field, the information only appears in the Interview tab when the file is open and in any Full Reports generated under the Report tab.



As many states have not adopted unified forms or procedures, interviews often need to be individualized by county or other court designation. So, to avoid confusion upon editing or updating, it is a good idea to include jurisdiction information as part of the metadata of the interview.

The screenshot shows the A2J Author software interface. The main window is titled "My Interview [not saved]". On the left, there is a sidebar with buttons for "Interview", "Variables", "Steps", "Questions", and "Report". The "Interview" button is selected. The main area is titled "Enter information describing your Interview." and contains several input fields:

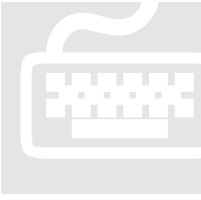
- Title: My Interview
- Description: This is a description of my interview.
- Jurisdiction: Jurisdiction of my interview
- Author: Anonymous
- Feedback: Allow 'Send Feedback'
- Version: 1/19/2010
- Language: English
- Avatar: blank
- History: Interview created 1/19/2010
- Logo Graphic: [empty field]
- End Graphic: [empty field]

A red box labeled "Information Fields" is positioned on the left side of the main area, with red arrows pointing to the Title, Description, Jurisdiction, Author, Feedback, Version, Language, and History fields.

Figure 25: Information fields in the Interview Tab.

Author

The Author Field collects the names of those who have contributed to the interview. The default setting for this field is “Anonymous.” Like the above items of metadata, authorship information is included in any Full Reports generated under the Report tab. It may be helpful to those within your organization to know who last worked on the interview.



The LHI server hosts HotDocs® templates and A2J Guided Interviews® for Legal Services Corporation-funded legal aid organizations so that these templates and interviews may be served up over the web. The LHI server also provides a contributor portal so that the participating organizations can share work. If your interview will be made available to others, the authorship information is helpful. More information is available at www.lawhelpinteractive.org.

Version

The Version Field collects version information. The default setting for this field is the date you created the interview file. This information too is generated in a Full Report. If you wish to pass around the interview in either report form or electronic form for peer review, it can be helpful to have a version number assigned to ensure that any comments received are relevant to the then-current round of revisions. For more on working with reports see the chapter entitled “Reports Tab.”

History

The History Field is a complement to both the Author and Version Fields. The default setting for the History Field is “Interview created [mm/dd/yyyy]” - the date included is the date you created the interview file.





The History field is a good place to reflect dates and authors of past versions of the interview (Figure 26.) You may also want to specify what was revised in the latest version, thereby keeping track of your revision process. Adding this documentation can be especially helpful if you will not be working in the interview on a daily basis.

Enter information describing your Interview.

Title:

Description:

Jurisdiction: Logo Graphic: 

Author: End Graphic: 

Feedback: Allow 'Send Feedback' Mail to (optional):

Version: Language: Avatar:

History:

Figure 26: Interview tab with information completed.

Language, Avatar, Send Feedback, Branding Logo & End Graphic Selections
 In addition to the metadata, the Interview Tab also provides five preference selection tools: Language, Avatar, Send Feedback, Branding Logo and End Graphic.

Language

Language of the static buttons, which are located in the menu bar across the top of the A2J Guided Interview™ interface, can be set to either English or Spanish. Should you write an A2J Guided Interview™ in Spanish, you can opt to have all static buttons within the interface set to Spanish. Please note that this selection does not function as a translator. Thus, if you want your Questions and just-in-time learning features to appear in Spanish, you must provide the Spanish translations. The following static button selections are translated under the Language setting for Spanish as follows:

English (Figure 27)	Spanish (Figure 28)
BACK	Anterior
NEXT	Siguiente
MY PROGRESS	Mi Progreso
SOUND IS ON	Sonido esta encendido
SOUND IS OFF	Sonido esta apagado
SEND FEEDBACK	Enviar comentarios
EXIT	Salida



Figure 27: Static buttons are located along the menu bar at the top of the screen.

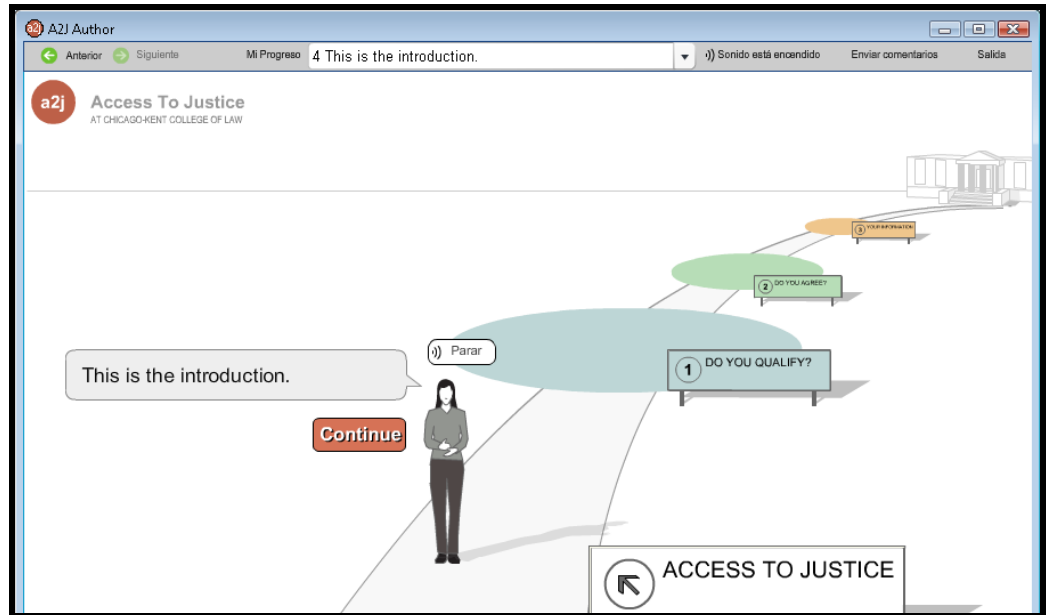


Figure 28: A2J Guided Interview™ with static buttons in Spanish.

Avatar

The A2J Guided Interview™ interface includes two avatars: the Avatar Guide and the computer end-user’s Avatar. The Avatar Guide is a woman avatar that helps provide the end-user of the interview access to justice by walking the end-user down the path of questions leading to the court house (or alternative graphic). End-users, so long as they have been provided the option to make a selection for gender, are provided their own Avatar which accompanies the Avatar Guide down the path to justice.

In the Interview tab you have the option of selecting either “blank” or “tan” for the Avatars (Figure 29). The color selection will affect the Avatar Guide and the end-user’s Avatar. To view the avatar images that are used in the software, see Appendix B.

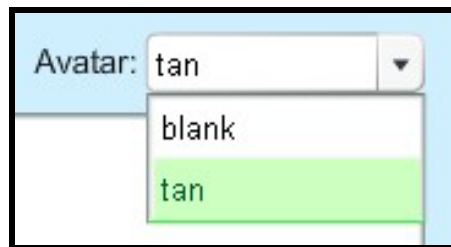


Figure 29: Avatars colors: “blank” or “tan.”



To avoid having the Avatar Guide walk alone beyond the first or second question in your interview, it is a good idea to include a question that requires the end-user to select gender. In addition, it is important to use the variable recognized by A2J Author® for setting the Avatar’s Gender: “User Gender”. For a tutorial on this subject, please see:

<http://www.a2jauthor.org/drupal/?q=node/177>

Send Feedback

The Send Feedback option, when turned on by the author, allows End User's to report a problem or ask a question about the A2J Author Interview™ they are completing. Authors can direct the feedback to a specific person affiliated with the interview or with the organization who created the interview by inserting the appropriate e-mail address. All feedback is also routed to the developer's of the A2J Author® software, CALI, so that end-user reports that reflect a bug in the software can be immediately evaluated.

Branding Logo

The “Branding Logo” allows organizations publishing A2J Guided Interviews® to add their program's logo to the bottom right-hand corner of A2J Guided Interviews®. If you wish to add a branding logo to your interview, simply click on the yellow folder icon to the right of the Branding Logo field (Figure 30). Then browse for and select the desired branding logo file.

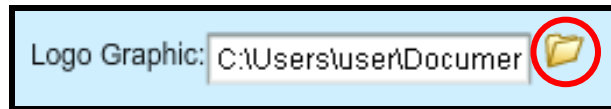


Figure 30: Select the yellow folder icon to browse for and select a branding logo for your interview.

Please note that parameters do apply to the format of the graphic, as follows:

- 120 x 120 pixels
- alpha transparency
- .jpg, .png, .gif, or .swf (Note: To browse for all types of files, be sure to type “*.*” for the file name after you have selected the yellow folder to browse.)

If the figure is larger than the above parameters, then it will be cropped automatically. An example of a figure that properly fits within the parameters is pictured in Figure 33, below.

End Graphic

The traditional destination in an A2J Guided Interview™ is a courthouse (see Figure 31 and Appendix B). That graphic can be changed. An alternative graphic may be more suitable if an interview is to be used in the context of online intake interviews.

If you wish to retain the traditional courthouse graphic file, you do not need to attach any graphic file. However, if you wish to choose an alternative graphic to the traditional courthouse, simply click on the yellow folder icon to the right of the End Graphic field (Figure 32).

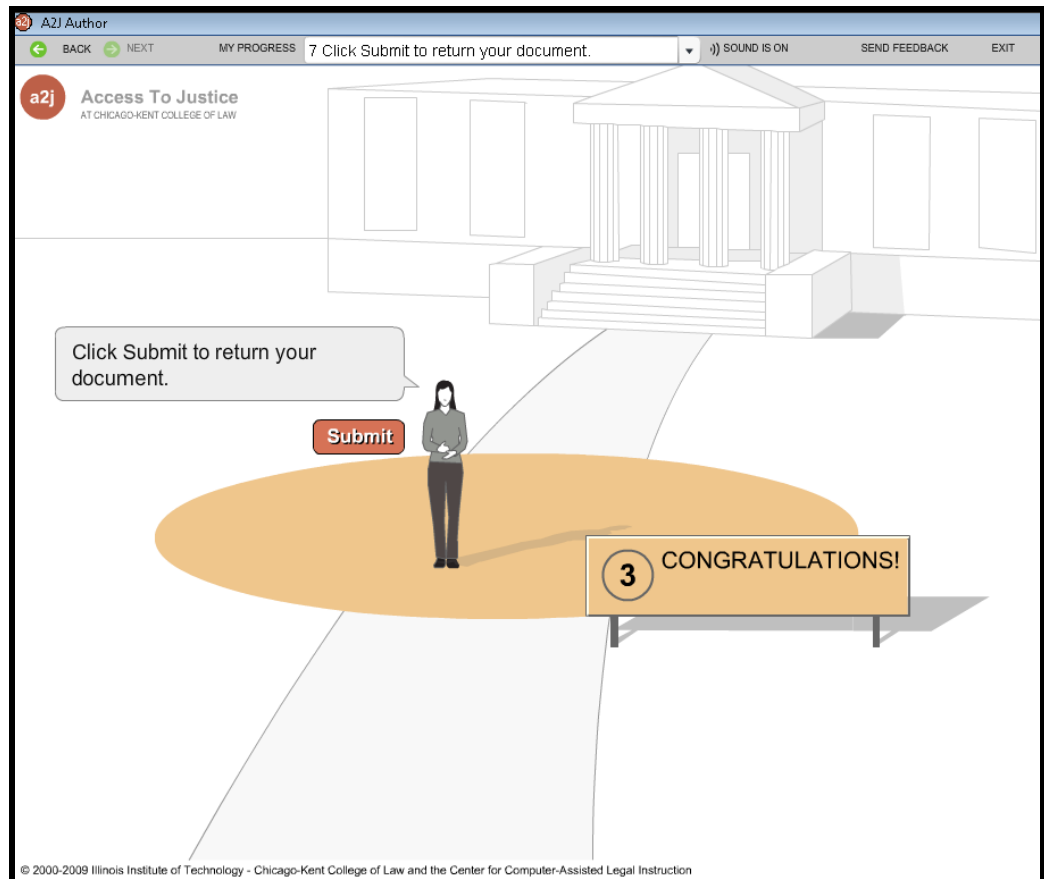


Figure 31: Traditional A2J Author® courthouse graphic.

Then browse for and select the desired end graphic file (Figure 32).

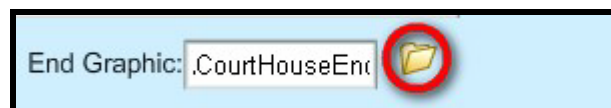


Figure 32: Select the yellow folder icon to browse for and select an end graphic for your interview.

You can design your own graphic from scratch or you can design a graphic using the courthouse graphic as a template which is available in the Starter-Kit download on www.a2jauthor.org.

The following parameters are required for an alternative graphic:

- 900 x 250 pixels
- alpha transparency
- .png or .swf

The pixels must be exactly 900 x 250 so that the graphic is properly centered over the roadway (Figure 33). And, the alpha transparency is needed so that the background of the graphic does not cover up the horizon or the roadway.



Figure 33: Template graphic centered over roadway.

To help you get started with your own graphic, the A2J Author[®] Starter-Kit installation includes two template graphics: an .swf (shockwave flash/vector graphic image or “swif”) and a .png (portable network graphic/bitmapped image or “ping”). The templates are stored in the sub-folder entitled “End Graphic Sample.” The template graphics includes a sign styled in the same fashion as the signs alongside the road in the interview interface. They also include a legal aid logo and text which can be modified.

To edit the graphic, open the file in a graphic editing program such as Flash[®] or Photoshop[®]. The template graphic is already formatted as 900 x 250 pixels, so no adjustment should be made as to size. You will want to save the graphic “for the web” as a PNG-24 or PNG-32 type file, and make a selection for transparency.

Of course, it is not necessary to begin with the graphic template provided. You can use your own graphic, so long as it meets the parameters listed above.

Variables Tab

Spouse first name TE=John; Spouse last name TE=Doe, etc.

A variable is a place to store information. Each variable is given a name which usually reflects the type of information it is meant to collect. For instance, the information meant to be collected by the variable name “Employer name TE” is obvious. Ultimately, information stored in a variable is used, primarily, to populate the fields in a HotDocs® template.

Thus, this chapter will first explain how to import the template’s variable names into A2J Author® from a HotDocs® component file and keep track of your associated HotDocs® template. This chapter will also demonstrate how to manage variables under the Variables Table and Variables Information window. Finally, this chapter will provide a detailed look at the properties of each variable type, including fifteen program variables which control the gender and color of the Avatars, optional sign text, and the appearance of the Back, Next and My Progress navigation bar items.

HotDocs® Template and Variable Names

The Variables Tab includes a HotDocs® Templates field and a Load Variables import feature. Each of these features is described below.

HOTDOCS®
 TEMPLATES
 FIELD:

A2J Author® was originally designed to work with HotDocs®, where an A2J Guided Interview™ is used as the alternative customer interface. So while there are alternative uses for A2J Guided Interviews®, most A2J Guided Interviews® are associated with a particular HotDocs® template for which it is collecting data. Coordinating versions of a HotDocs® template and associated A2J Guided Interview™ can be troublesome once the process of revising begins. Thus, it may be useful to keep track of the name of the HotDocs® template in the HotDocs® Templates field (see Figure 34).



An entry in this field is for informative purposes only and has no effect on the coordination of the interview and template on a server.

“LOAD
VARIABLES” :

Variable names stored in a HotDocs® component (.cmp) file can be imported into an interview. This import feature is located at the bottom of the Variables Tab screen and is indicated by a yellow folder labeled “Load Variables” (Figure 34).

To use the “Load Variables” function, click on the yellow folder icon to browse for the correct component (.cmp) file for the corresponding HotDocs® template. After selecting the component file, all variable names will be loaded into the Variables Table.

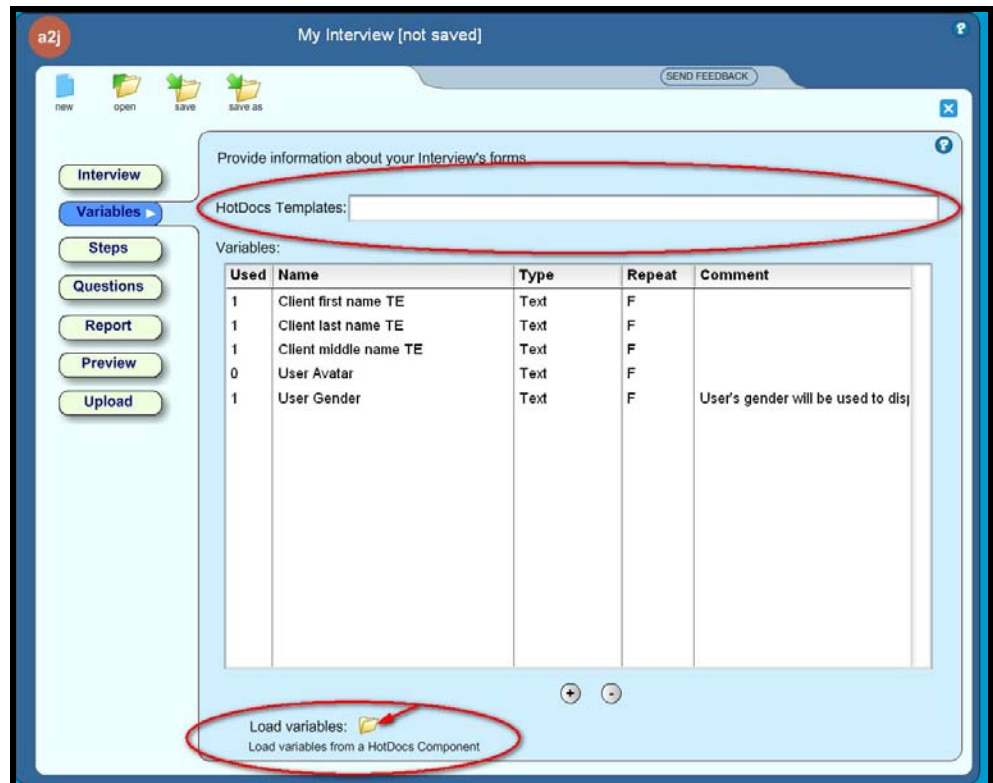


Figure 34: HotDocs® Templates field and Load Variables icon.



For a detailed tutorial on the process of importing variables and how to access imported variables during interview development, please see:

<http://www.a2jauthor.org/drupal/?q=node/216>



An essential key to a successful project is ensuring that you have addressed all of the required data components of the HotDocs® template. One way to avoid missing a data component is to design the HotDocs® template first and then to import the HotDoc variables into an A2J Guided Interview™. This helps to avoid typos of variable names in the A2J Guided Interview™, which can cause errors in assembling a template.

Variables Table and Variable Information Window

The Variables Table (Figure 35) contains a list of all of the variables imported from a HotDocs® component file and variables added during the design of the A2J Guided Interview™. It is organized into columns, each of which can be used to sort the variable list. The Variables Information window is an editing window and can be reached by double-clicking on any variable name.

Both the Variables Table and the Variables Information window include the following properties:

- information regarding the use of a variable,
- a variable’s “name” and “type,”
- whether the variable is included in a “repeat” dialog, and
- a comments/notes section.

The Variables Table is where you can view these properties, and the Variable Information window is where you can modify these properties.

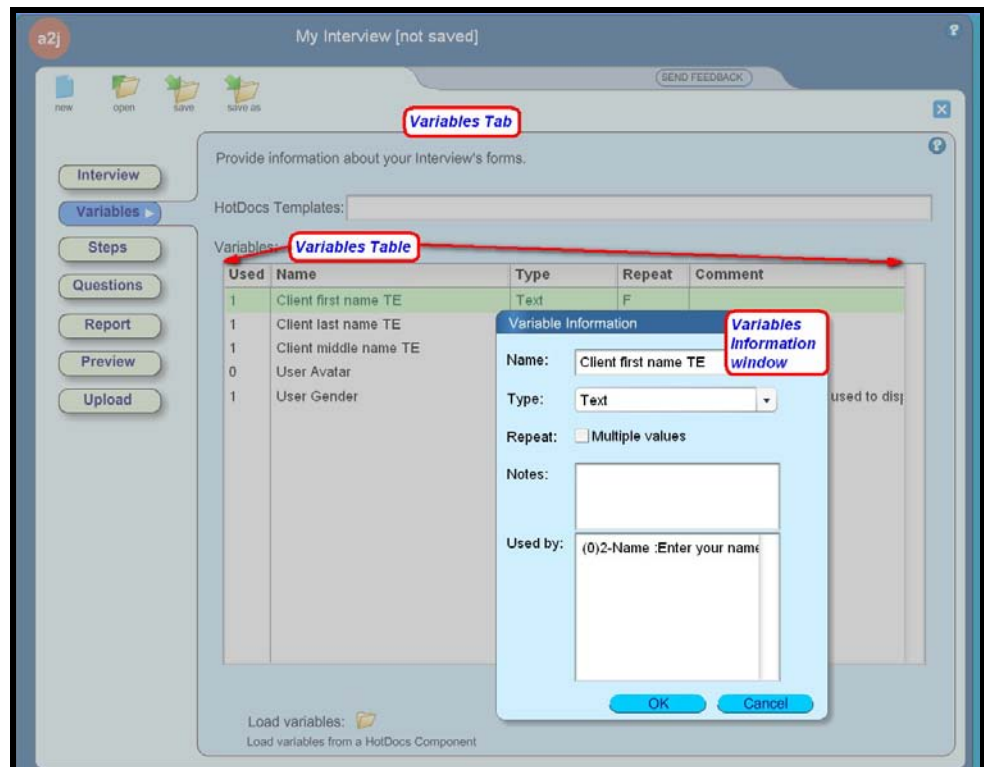


Figure 35: Variables Table and Variable Information window in the Variables Tab.

USED &
USED BY:

The Variables Table and the Variables Information window indicate, respectively, how many times a variable has been used in the interview, and where it was used.

The number in the “used” column of the Variables Table indicates how many times each variable has been used in the interview (Figure 36). By glancing quickly for variables with “0” in the “used” column, you can determine which variables still need to be used somewhere in the interview in order to collect the information necessary.

Used	Name	Type	Repeat	Comment
1	Decedent had will TF	True/False	F	Did the deceased have a will?
2	Decedent has children TF	True/False	F	This variable was used twice in the interview.
2	Decedent has father TF	True/False	F	

Figure 36: Used column in the Variables table.

In addition, you can consult the Variable Information Editing Window -- by double-clicking on the variable name in the Variables Table -- to determine *where* a particular variable has been “used” in the interview (see Figure 37). The “Used by” field lists the Questions which have used the variable. You can then link to that Question by double-clicking the Question name.

In Figure 37, you can see that the variable “Client middle name TE” has been used once in the interview under the Question entitled “(0)2-Name: Enter your name.” To edit that Question, and its use of the variable, you can double-click on “(0)2-Name :Enter your name” to link to the corresponding Question Design window.

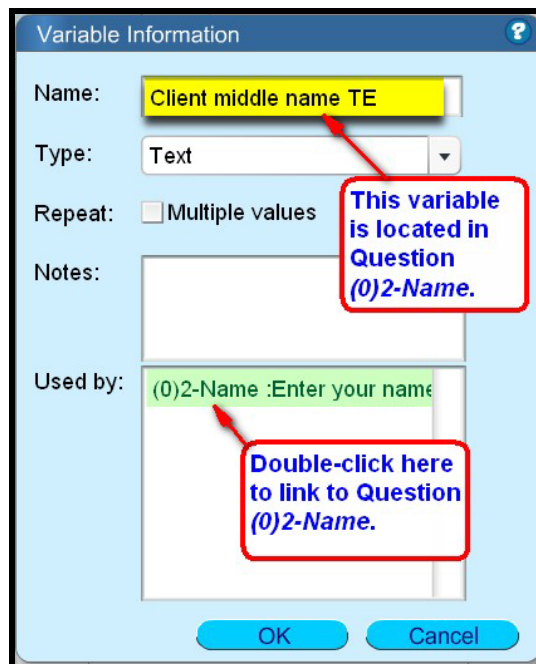


Figure 37: The Variable Information Editing Window.

NAME:

The Variables Table and the Variable Information window indicate the names of variables, and give you an opportunity to delete or edit variable names.

The Variable Table column entitled “Name” indicates the names of all of the variables imported or created during development, whether or not they have been used in a question. (For more on naming conventions for variables, see Appendix C.)

As you create variables during interview development, you may find that you have accidentally added additional variable names that are not being used anywhere. For example, in Figure 38, you will notice the variables “Employer TF” and “Ever employed TF.” Assume “Employer TF” was typed by mistake while creating a Question, and then later changed to “Ever employed TF.” The incorrect variable will appear in the table as an unused variable. Such variable names can be deleted from the Variables Table by highlighting the variable and selecting the “-” (minus) sign (Figure 38.) (Likewise, a new variable can be added by selecting the “+” (plus) sign (Figure 38.))

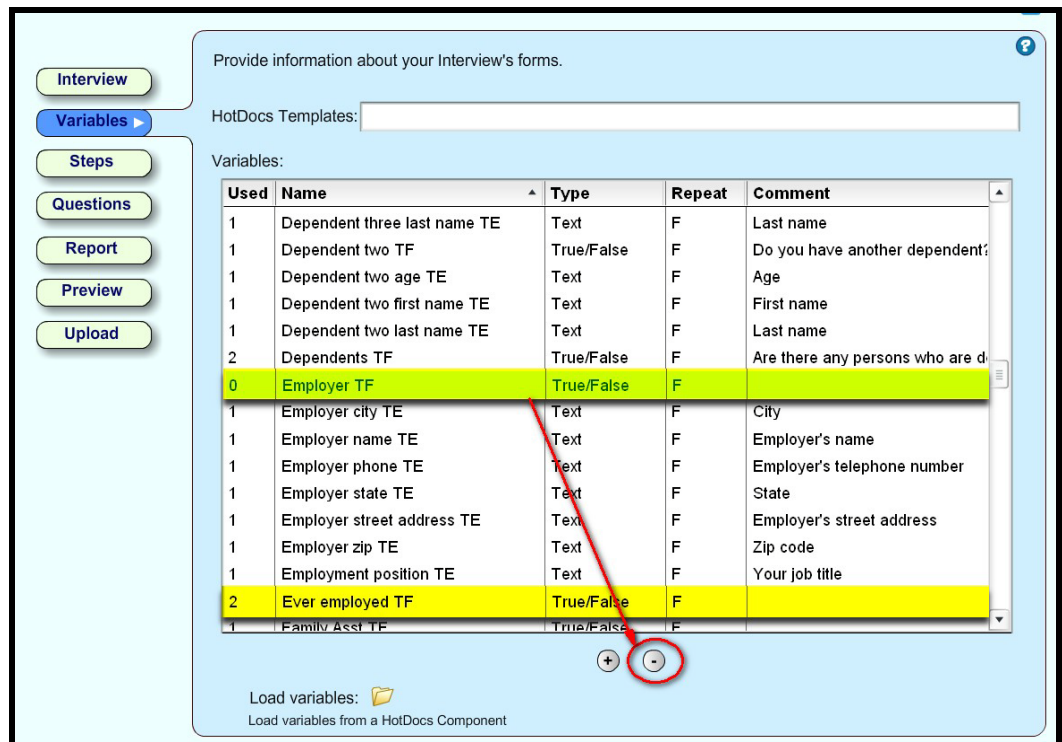


Figure 38: Unused variable name in the Variables Table.

TYPE:

The Variable Table indicates what variable “type” is assigned to each variable. The Variables Information window will allow you to change the assigned type.

Each variable can be assigned one of the following types: Text, True/False, Number, Date, Multiple Choice, Unknown, or Other. A variable’s type can be changed by

double-clicking on the variable name and editing the type in the Variable Information window (Figure 39).

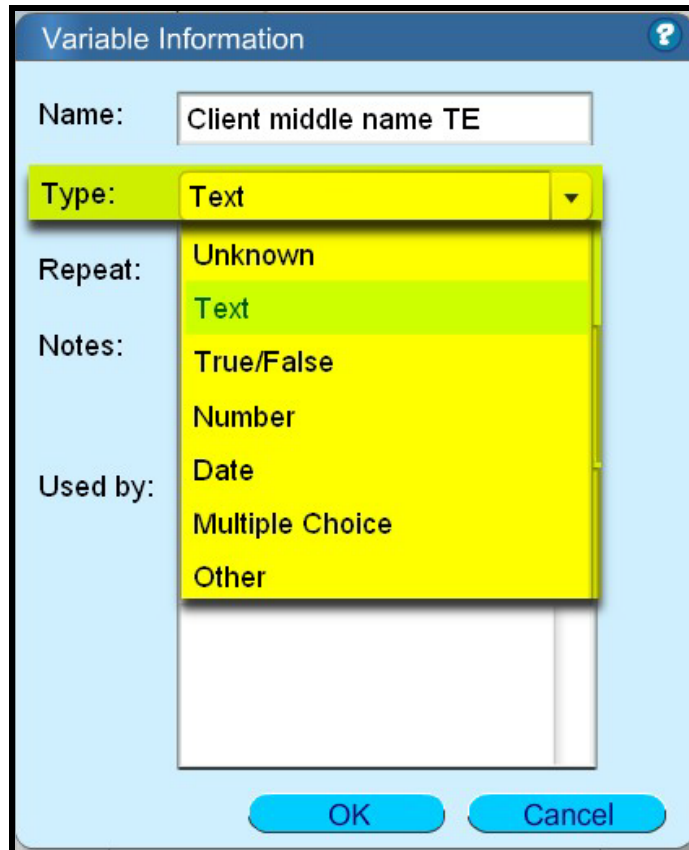


Figure 39: Variable Type selected in Variable Information window.



A variable's "type" determines how the data collected in that variable will later be evaluated. Thus a "variable type" is much different from a "field type," which merely designates the format in which the data will be collected. For example, a variable entitled "Phone number TE" may be assigned the field type "Number Phone," which tells A2J Author[®] to provide three consecutive fields to collect each portion of the phone number. But, the variable type assigned to "Phone Number TE" would be "Text," because the phone number will never be used in a numerical calculation. Rather, a phone number is treated as text.



Also, variable names are case and type sensitive. So a variable's name and type must match the variable used in the HotDocs[®] template. If not, any data collected by that variable will not populate in the intended field on the HotDocs[®] template.

For a complete description of all variable type properties, please see the main subheading below entitled Variable Type Properties.

REPEAT:

The entry in the “repeat” column of the Variables Table, and the checkmark indicating “multiple values” under the Variables Information window, indicate whether a particular variable has been used within a repeat dialog (Figure 40). So, the indication suggests that the variable may collect multiple values during the interview.

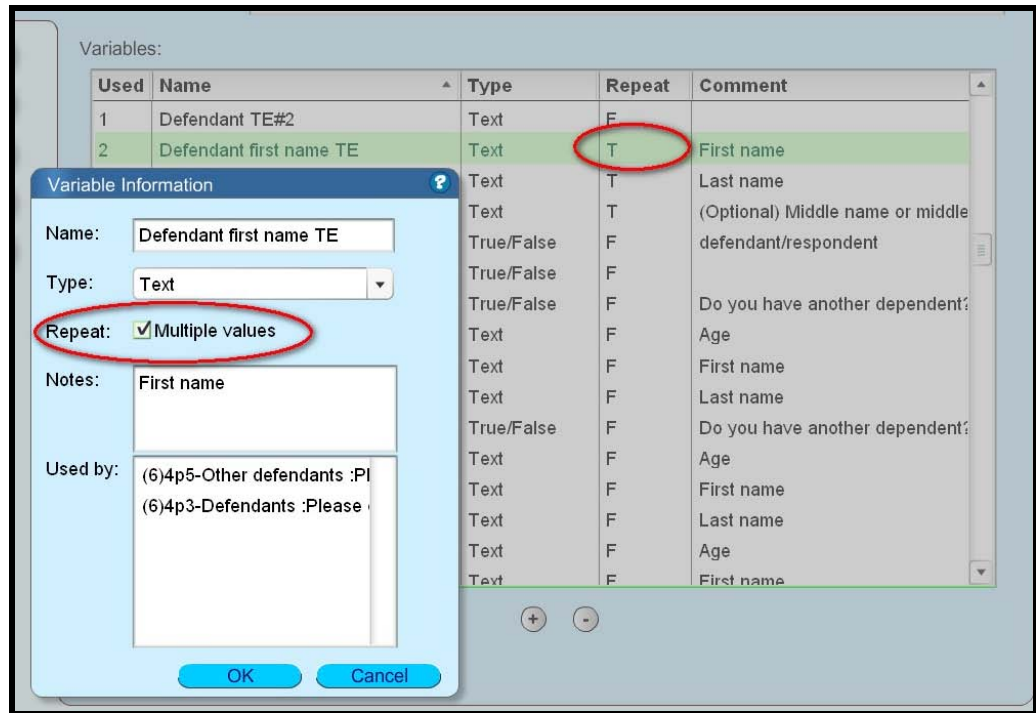


Figure 40: Repeat Column and Repeat Checkbox in Variables Table and Variable Information window.

The chapter entitled “Creating Questions” provides a detailed explanation of how to create repeat dialogs.



For a tutorial on the process of creating a repeat dialog, please see:

<http://www.a2jauthor.org/drupal/?q=node/95>

A downloadable training module is also available. Please see:

<http://www.a2jauthor.org/drupal/?q=node/233>

COMMENT:

The comment column contains information that you may wish to note about the variable. It is purely for reference purposes. It tells a future author what the variable is supposed to do. It is especially helpful for variables that are used behind the scenes to conduct calculations.

Variable Type Properties

Each of the following variable types is described below: Text, True/False, Number, Date, Multiple Choice, Unknown, and Other. In addition, the following A2J Author[®] program variables will be described: User Avatar, User Gender, A2J Step (1, 2, etc.), A2J Navigation TF, and A2J Interview Incomplete TF. The charts included at the end of this section provide a quick reference to the properties of each variable type.

“Text”

A Text variable type is used to collect data that should be treated only as text. So a text variable can be used to collect numbers that will not be used to perform calculations, such as phone numbers, social security numbers, and zip codes. In fact, A2J Author[®] will automatically set a variable used to collect a phone number, social security number, or zip code, as a text variable, so long as the “Number Phone,” “Number Social Security,” or “Number Zip Code” field type is selected to collect the data. The text variable type in A2J Author[®] corresponds with the “text” variable type in HotDocs[®].

“True/False”

The True/False variable type is used to collect a value of true or false only and corresponds with the True/False variable type in HotDocs[®]. However, True/False variables can be implemented in a couple of different ways in A2J Author[®], either through a checkbox or a pair of buttons.

First, every Checkbox and Checkbox(none of the above) field automatically functions as a True/False option. A2J Author[®] automatically assigns a True/False variable type to any variable associated with a checkbox. A checkbox functions as follows: True is the value populated in the associated variable when the box is checked, and False is the value populated when the box is *unchecked*.

Secondly, a True/False variable can be manually set in the context of two buttons. If two Buttons are created, you have the option of manually assigning a variable and variable value to each. So, for instance, if you were to provide a selection of two buttons in order to advance to the next question – let’s say you provide the options “yes” and “no” as options for answering a question – each Button could be assigned the same variable, one with a default value of True and the other False. (See the Buttons subheading in the Creating Questions chapter.)

“Number”

Number variables are used to collect numbers which need to be immediately evaluated, or will otherwise be needed at some point in the interview as part of a larger calculation. Thus number variables are often used to collect data such as asset values, income or benefits, pay rate, age, number of children, etc.

A2J Author[®] will automatically assign the “number” type to the following fields: Number and Number Dollar. A2J Author[®] will also attribute a number variable type to a Number(Pick from list) field. Even though the Number(Pick from list) appears as a drop down list providing multiple options, typically the value collected will later be needed in a calculation. Thus, A2J Author[®] associates this field type with the number

variable type instead of the multiple choice variable type. The number variable type in A2J Author[®] corresponds with the number variable type in HotDocs[®].

“Date”

Dates are collected in A2J Author[®] using the date field type which provides a pre-formatted series of three drop down menus for collecting each component of a date: month, day, and year. If the date field type is selected to collect a date, A2J Author[®] will automatically assign the associated variable as a date variable type.

While a text variable type could be used in conjunction with a text field to collect a date, the date field and variable type provide additional functionalities such as the capability of conducting calculations using a date. (See the Date Field Type under the “Creating Questions” chapter for additional information on the functionality of the Date Field.)

“Multiple Choice”

Multiple-choice variables are used to collect a single value from a set of multiple choices. Multiple-choice variables can be used in the context of a series of radio buttons or a multiple-choice drop down text list.



The Multiple-choice variable type does not allow for collecting multiple values or selections from a set of multiple choices for a single variable. To provide the end-user with an option of selecting multiple items from a list, you must use True/False variables in coordination with Checkbox fields.

“Other” and “Unknown” Variable Types

Any variable designed in association with a Button is automatically assigned the variable type “Unknown.” The variable type “Unknown” is also assigned to the twelve “step” variables (see subheading Program Variables for Steps, below).

The variable type “Other” is a reserved variable type not currently in use. Either “Unknown” and “Other” can also be used as placeholders in the event you are unsure what variable type you want to use – just be sure to modify it to the correct variable type before you complete the interview.

Program Variables for Gender and Avatar

There are two program variables that change the presentation of the Avatar Guide and User Avatar: User Gender and User Avatar. The variable “User Gender” determines whether the Avatar Guide speaks to a male or female Avatar. The value for this variable must be collected early in the interview, in a Gender field, in order for the Avatars to show up in the interface. The variable “User Avatar” determines which avatar group is chosen, changing the Avatar Guide and the Avatar from “blank” to “tan” (see Appendix B for Avatar images).

Program Variables for Steps

There are twelve “step” variables, one for each possible “step” in A2J Author®, as follows: A2J Step 1, A2J Step 2...A2J Step 12. These variables allow a step’s sign to be customized. For example, a sign defined as “Spouse’s Information” under the Step Tab, can be reflected later on as “John’s Information” (Figure 41).

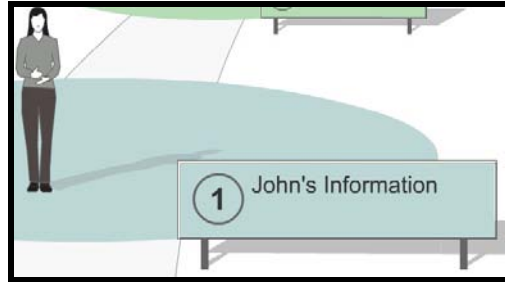


Figure 41: Sign modified by Step Variable.

In order to accomplish this customization, you need to collect a value that you eventually want to use in a sign’s text. So, “Spouse first name TE” might be used to collect a spouse’s first name. Following the collection of a value for that variable, you can then set the desired step variable equal to the value previously collected plus whatever other text you would like included in the sign. Thus, A2J Step 1 could be set equal to: %%Spouse first name TE%% + “’s Information”. Setting a step variable takes place under the Advanced Tab (Figure 42).

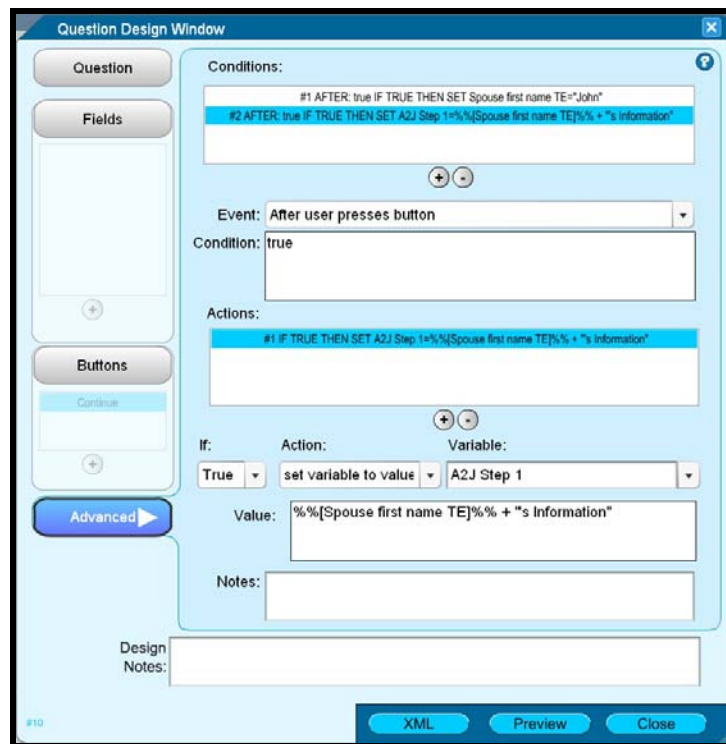


Figure 42: Step Variable used to set Sign Text for Step 1.

Program Variable for Navigation

Authors can remove the Back and Next navigation buttons by setting the A2J Navigation TF program variable to false. The default setting for A2J Navigation TF is true. Thus, unless an author chooses to set the program variable to the value “false” under the Advanced Tab, the Back and Next buttons will appear in each question of an A2J Guided Interview™. (See the Creating Questions chapter for more information about setting conditions under the Advanced Tab.)

Program Variable to Track Exit Point

The A2J Interview Incomplete TF program variable applies when an A2J Guided Interview™ has been enabled with the Exit feature which allows an end-user to exit to the LHI server before they have completed all of the questions. Upon selecting the Exit button provided by the author in the Exit Question, the A2J Interview Incomplete TF variable is set to true. (See the Creating Questions chapter for a complete description of the Exit to save incomplete data feature.)

Computation Variables in HotDocs®

Computation variables are not imported into A2J Author®, thus leaving you with two options for handling computation variables. The first option is to collect the data which feeds into a computation, thereby letting HotDocs® complete the computation. The second option is to complete the computation in A2J Author®, in which case you can get rid of the computation in HotDocs® and simply represent the computation value in a HotDocs® text or number variable.

Variables Reference Chart

VARIABLE “TYPE”	PROPERTIES
Text	<ul style="list-style-type: none"> * Corresponds with Text type in HotDocs® * Treats text and numbers as text * Automatically assigned to Text, Text(Long), Number SSN, Number Phone, and Number Zip Code fields
True/False	<ul style="list-style-type: none"> * Corresponds with True/False type in HotDocs® * Can be assigned to variables associated with Buttons * If true/false value is manually set in the context of Buttons, true and false will be treated as boolean values and can be evaluated in a condition as either <i>true</i> or <i>false</i>, as the case may be. * Automatically assigned to Checkbox and Checkbox (none of the above) fields * Boolean value <i>true</i> is attributed to checked box * Boolean value <i>false</i> is attributed to unchecked box

VARIABLE "TYPE"	PROPERTIES
Number	<ul style="list-style-type: none"> * Corresponds with Number type in HotDocs® * Allows the value collected in the variable to be evaluated * Automatically assigned to Number, Number Dollar, and Number (Pick from list) fields
Date	<ul style="list-style-type: none"> * Corresponds with Date type in HotDocs® * Automatically assigned to Date fields * Accounts for leap year
Multiple Choice	<ul style="list-style-type: none"> * Corresponds with Multiple Choice in HotDocs®, where only one value can be selected * Does not allow a variable to collect multiple values * Automatically assigned to Text (Pick from list) and Radio Button fields
Other	<ul style="list-style-type: none"> * Assigned to imported variables with types not understood by A2J Author®
Unknown	<ul style="list-style-type: none"> * Automatically assigned to variables created in Buttons and conditions under the Advanced Tab * Functions as a placeholder until correct type is known and assigned

Program Variables Reference Chart

PROGRAM VARIABLES	PROPERTIES
User Avatar	<ul style="list-style-type: none"> * Text type variable * Value is collected from the Interview Tab at the time the interview is developed * Value collected is used to set the color of the Avatar Guide and the end-user's Avatar

PROGRAM VARIABLES	PROPERTIES
User Gender	<ul style="list-style-type: none"> * Text type variable * Value collected is used to set the gender of the end-user's avatar * Should not be deleted from the interview
A2J Step 1-12	<ul style="list-style-type: none"> * Sets customized text for a step's sign * Format = A2J Step 1, A2J Step 2, etc. * Set in the advanced tab
A2J Navigation TF	<ul style="list-style-type: none"> * Sets display of Back, Next & My Progress features in Navigation Bar * True = display on * False = display off
A2J Interview Incomplete TF	<ul style="list-style-type: none"> * Tracks whether the end-user has exited the interview using the Exit to save incomplete data option * True = exit occurred before the interview's end * False = exit occurred at the interview's end

Variable Macros

Any variable can be used as a macro in order to call the value of the variable to include the value in the context of question text, to set the value of another variable, or to include the value of a variable in a field label.

The macro format is: **%%[Variable name here]%%**

Question Text Macro

In Figure 43, the author is calling up the value of a variable that was used in an earlier question to collect the user's first name. The variable used was "Client first name TE." Thus, the macro format used in the question is: %%[Client first name TE]%%.

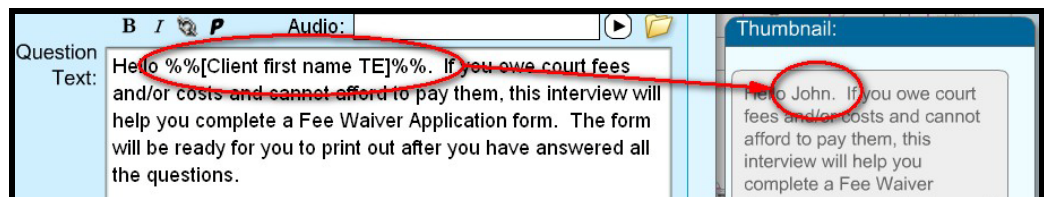


Figure 43: Variable macro in the context of question text.

Macro to Set a Variable's Value

In Figure 44, the author is calling up the value of three separate variables that were used in the current question to collect the end-user's first, middle, and last name. The variables used were "Client first name TE," "Client middle name TE," and "Client last name TE." The author then writes an expression in a condition under the Advanced Tab to determine whether the end-user has entered a middle name. Then, the author sets the variable "Client name TE" to equal either the values of the first, middle, and last name together, or the values of just the first and last name, including spaces where appropriate. The macro format for the latter would be: %%[Client first name TE]%% + " " + %%[Client last name TE]%%

If:	Action:	Variable:
True	set variable to value	Client name TE
Value: %%[Client first name TE]%% + " " + %%[Client last name TE]%%		

Figure 44: Using a macro to help set the value of a different variable.

Macro to Set a Label

Assume you use two different variables to collect the names of two healthcare agents: "Agent 1 TE" and "Agent 2 TE." You would then call up the value of each variable separately in the context of a radio button label for the purpose of determining the primary healthcare agent. The macro format is: %%[Agent 1 TE]%% and %%[Agent 2 TE]%%(Figure 45).

Type:	Radio Button
Label:	%%[Agent 1 TE]%%
Variable:	Agentindex
Default value:	agent1

Figure 45: Variable macro for a Radio Button label.

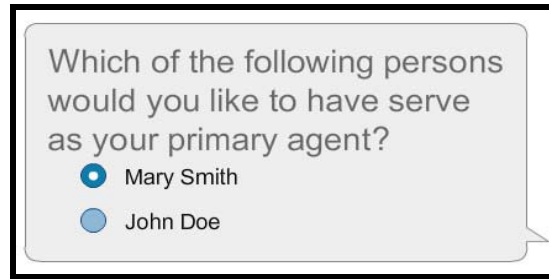


Figure 46: Variable Macro in a label.

Ultimately, you want the choice of primary agent (Figure 46) to be reflected in the variable “Agent primary TE.” In order for the selection’s value to populate this variable, you must index the selections. Using the variable “Agentindex,” assign the default value “agent1” and “agent2” to the radio button options (Figure 45). Then, under the advanced tab, the variable “Agent primary TE” can be populated according to the value of the indexing variable (Figure 47).

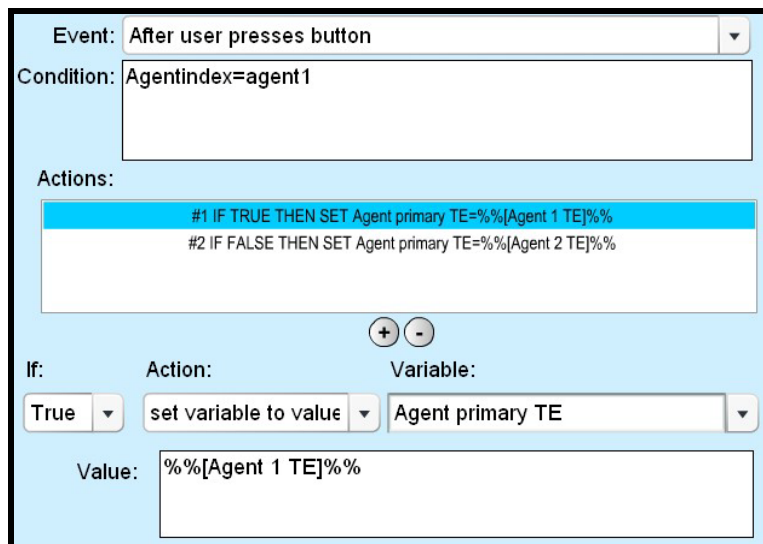


Figure 47: Index variable used to set variable.

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Steps Tab

Lead the self-represented litigant down the pathway to justice with progressive “Steps.”

The central theme of the A2J Author[®] software is, of course, “Access to Justice” for self-represented litigants. This theme is represented by a pathway marked by “Signs” (Figure 48) which indicate progressive steps towards assembling a document to be filed with a court clerk. In the case of web intake the signs may represent progressive steps toward filing an intake application online. In either event, the Signs help give structure to the A2J Guided Interview[™] and provide a sense of progress to the self-represented litigant.

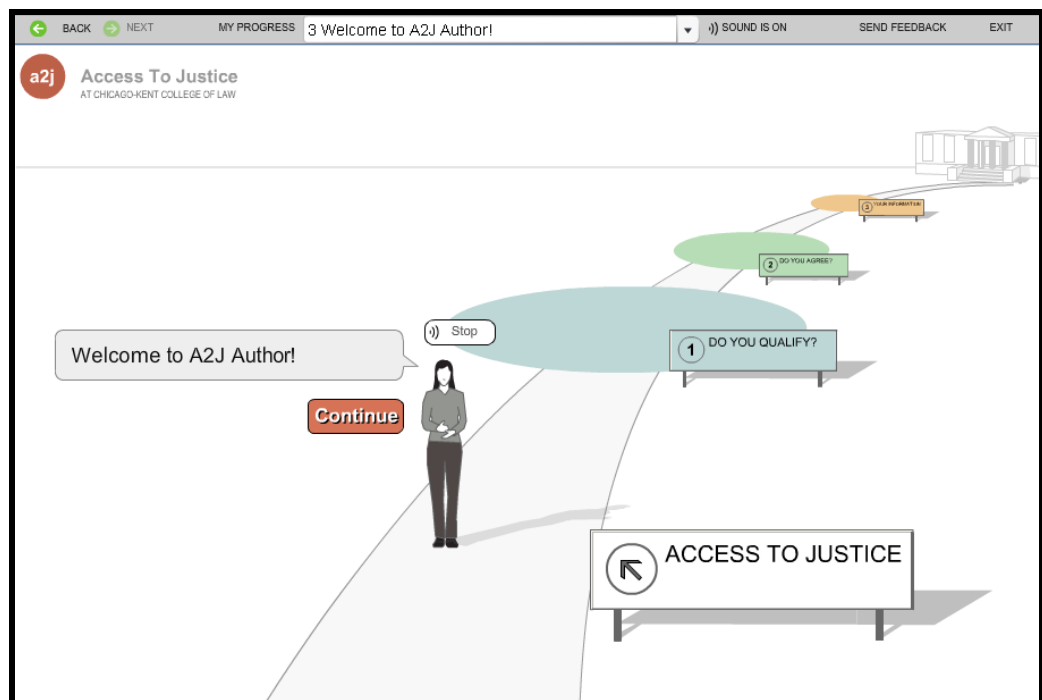


Figure 48: The Pathway in A2J Author[®] - representing “access to justice.”

STEPS TAB

Creating these “Steps” in A2J Author® is quite simple. Associating the interview’s questions to correspond with each of the steps is also quite simple. Instructions for both are discussed below.

Creating Steps

You can create Steps under the Steps Tab by selecting the “Steps” navigation button (Figure 49). The Steps Tab includes a mechanism to select the number of steps, an editing function that allows you to name the steps, and a preview of the pathway at each step. Each of these components is described below.

SELECT THE
NUMBER OF
STEPS:

The Steps Tab allows you to break up your interview into separate steps. An interview can have between 0 and 12 different steps. By selecting the up or down arrows next to the label entitled “Question steps”, you can remove any of the default Steps or add up to a total of 12 steps. Each Step may contain an unlimited number of Questions. After Questions under a particular Step are answered, the end-user moves one Step closer to the court house.

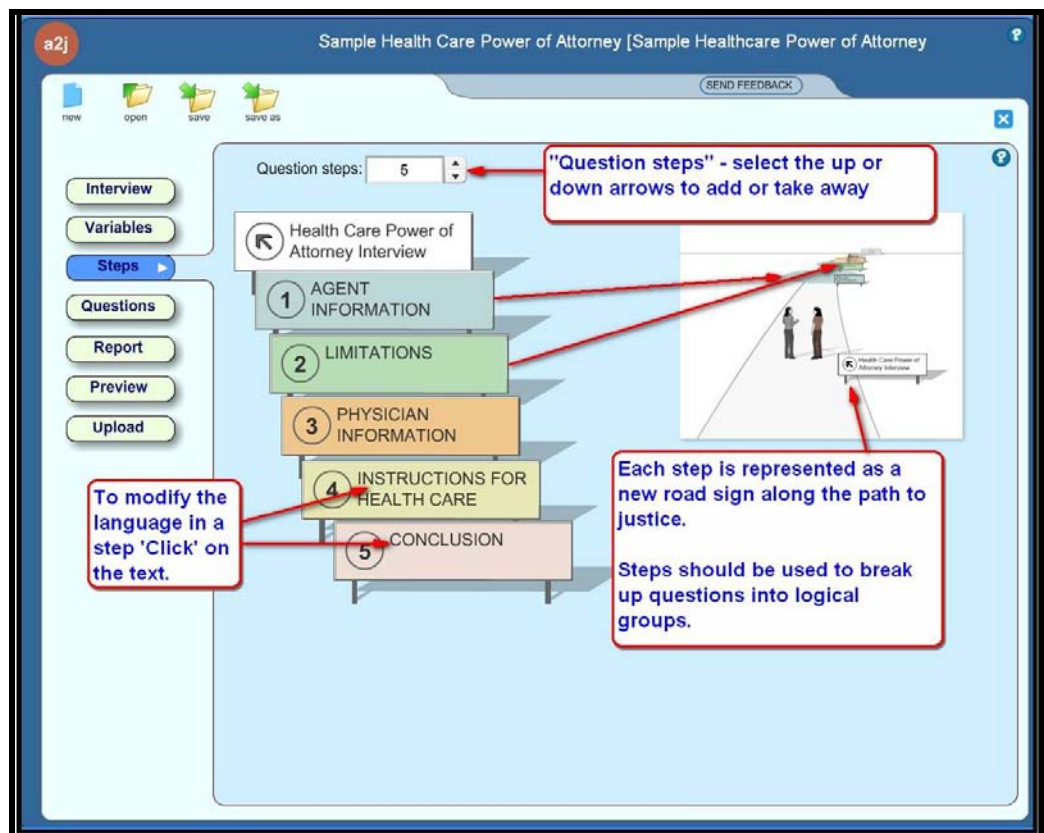


Figure 49: The Steps Tab allows you to divide up your interview questions into logical groupings that “make sense” to the end-user.

GIVE EACH
STEP A NAME:

Each Step is visually represented under the Steps Tab as a colored sign. As you add Steps using the up and down arrows, you will notice additional colored signs being added to the Steps tab. Once the number of desired Steps is selected, the text or title of

each Step can be modified by selecting each numbered Sign and modifying the text. Simply click on the desired Sign, place the cursor at the beginning, and begin typing. Lowercase or capital letters can be used. A maximum of two lines of text, including no more than 50 characters, can be used in a Sign. But, due to variations in character width, as little as 12 characters per line may be permitted.

**PREVIEW THE
PATHWAY:**

The Signs that represent each Step of your A2J Guided Interview™ can also be contextually previewed within the Steps tab. For instance, by selecting the Sign for Step “0” you can preview the entire pathway, complete with all Signs, as it will look to the end-user upon launching the interview (example in Figure 50). As you select other Signs, you can preview the pathway as it will look in the context of any Step within the interview (example in Figure 51).

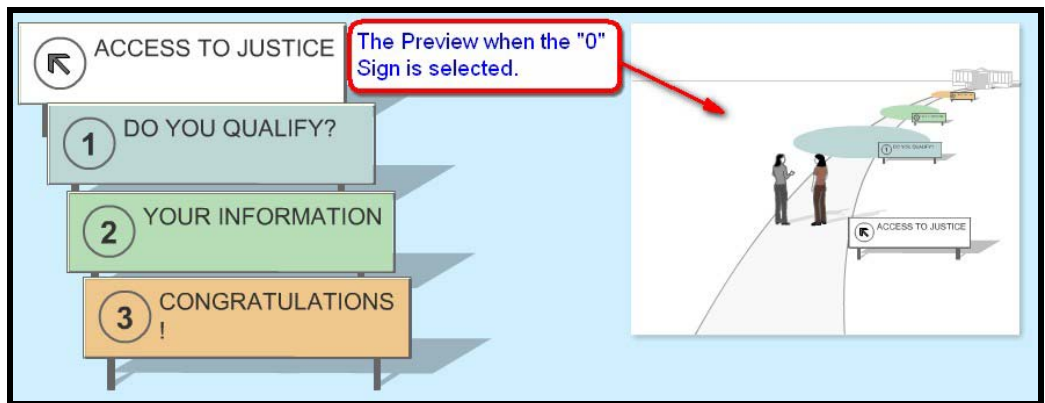


Figure 50: Preview of pathway under Step “0”.

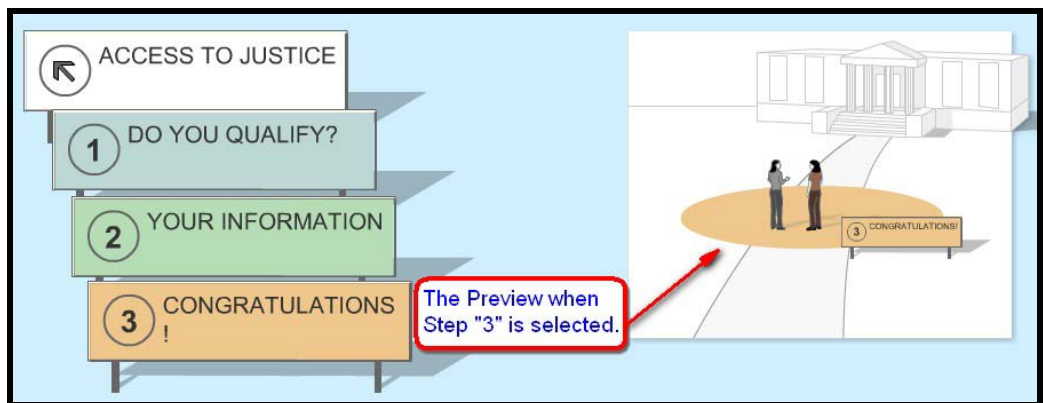


Figure 51: Preview of pathway under Step “3”.

Notice also that the color of the platform, upon which the end-user’s Avatar and Avatar Guide appear, and the corresponding Sign, are the same color as the sign where you edit the text in the Steps Tab.

Default Steps

A2J Author[®] provides the following 4 default Steps in a new interview: (0) Access to Justice, (1) Do You Qualify?, (2) Do You Agree?, and (3) Your Information (Figure 52). The Sign for Step “0” contains the default language “Access to Justice”. Most authors use this initial step to welcome the end-user to the interview and collect his or her name and gender.

The default Sign for Step (1) is entitled “Do You Qualify?” Asking the end-user “qualifying” questions is usually the best choice for an initial step following the collection of name and gender. For example, if there are answers to questions that would potentially preclude an end-user from using the form for which the interview is designed, then those questions are best asked up front.

The default Signs for Steps (2) and (3) are entitled “Do You Agree?” and “Your Information,” respectively. These are merely suggested titles and can be changed to correspond with how you have decided to organize the Questions in your A2J Guided Interview[™].

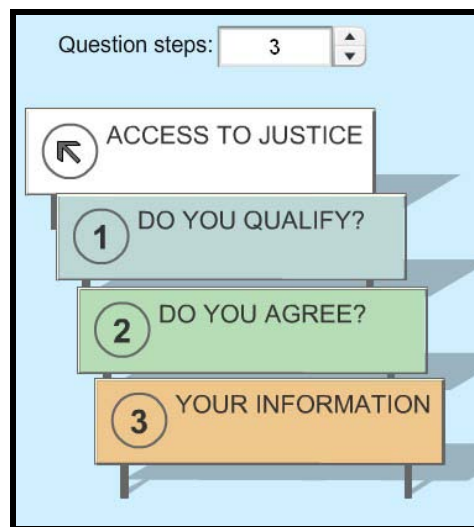


Figure 52: Default Steps provided in a “new” interview.



It is important to collect name and gender up front in the interview, either under Step (0) or Step (1). Regardless of whether gender is required for your interview or document assembly purposes, it is nevertheless required to set the gender of the end-user’s Avatar. Collecting the end-user’s name up front allows you to later personalize the interview by recalling their name in the text of a question using a macro. For an online tutorial on setting the Avatar’s Gender see:

<http://www.a2jauthor.org/drupal/?q=node/177>.

For an online tutorial on personalizing Questions see:

<http://www.a2jauthor.org/drupal/?q=node/204>.

Creating Questions

“Please enter your name and address in the fields below.”

Questions are the heart of an A2J Guided Interview™. It is in each Question that you ask for information from the end-user and provide them with directions, definitions, and links to external resources. A Question is represented to you in four ways. First, you can view the Question’s name or title in the Question List. Second, a thumbnail view of each Question is pictured in the Question Flowchart. The Question List and Flowchart are located under the Question Tab and are viewed by selecting the “Question” navigation button from the main menu.

The third way you can view a Question is by selecting, or double-clicking, a Question from the Question List or Flowchart. Doing so reveals the Question Design Window for the selected Question. It is in the Question Design window that detailed construction of the Question, including its text, fields, buttons, advanced conditions, and various help features, takes place.

Finally, you can view a Question in Preview Mode. The Preview Mode allows you to view the Question as the end-user would see it. It also allows you to conduct troubleshooting.

This chapter is intended to provide you with a guide to the Question Tab, including the Question List, Question Flowchart, and Question Design Window feature, where you will spend the majority of your time authoring an A2J Guided Interview™. For more on viewing Questions under the Preview Mode, see the chapter entitled “Preview Mode.”

Question Tab

The bulk of interview authoring occurs under the Question Tab (Figure 53). The Question List, Question Flowchart, and Question Design Window are all reached by opening up the Question Tab using the Question navigation button in the main menu.

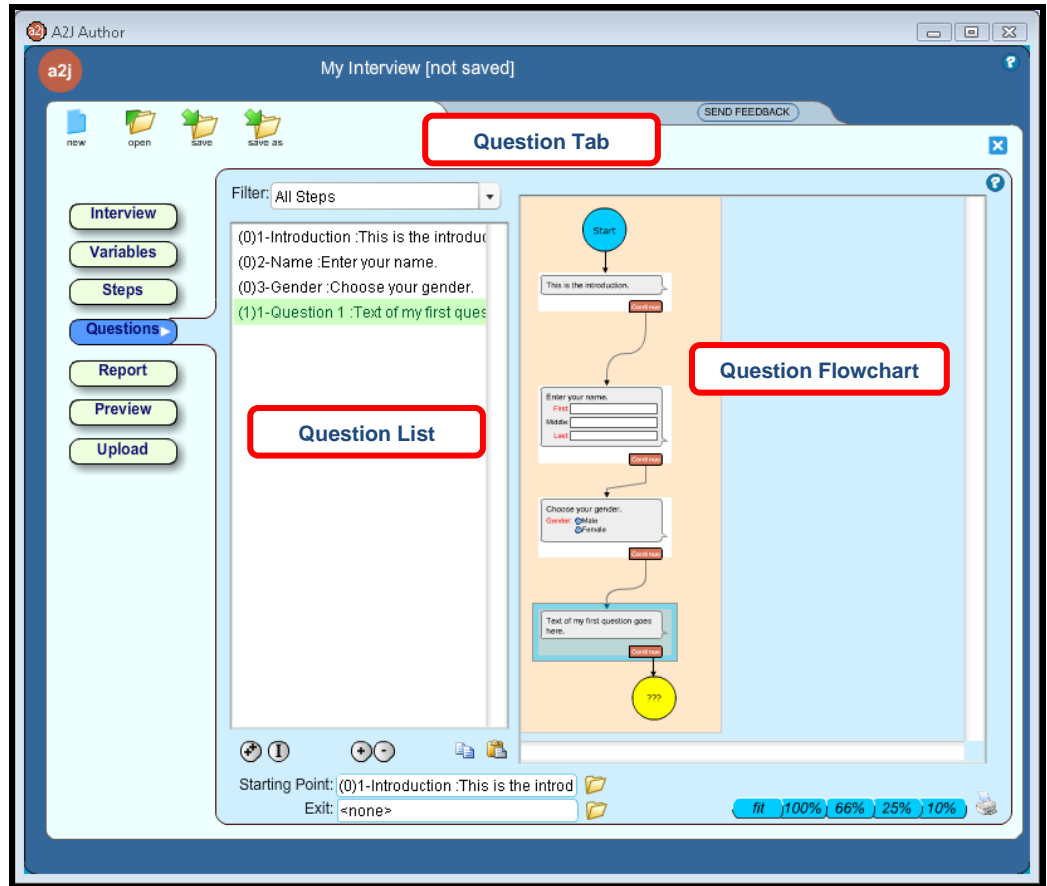


Figure 53: The Question Tab.

The Question List

Every time you begin a new interview, the Question List is populated automatically with a Template Interview consisting of four Questions. A description of the Template Interview is described below. The Question List is where you will Add, Delete, Insert, and Clone Questions. It is also where you can select Questions for copying and pasting into another A2J Guided Interview™.

TEMPLATE
INTERVIEW:

When you create a new interview, A2J Author® automatically provides a simple template interview to get you started. The template interview consists of four Questions. The first Question, entitled “(0)1-Introduction,” is a simple place holder for your introductory text. The next two Questions, entitled “(0)2-Name” and “(0)3-Gender”, respectively, ask the end-user for his/her name and gender. The last question, entitled “(1)1-Question 1” is a place holder for your next question. The Question titles provided in the template interview are pictured below in Figure 54.

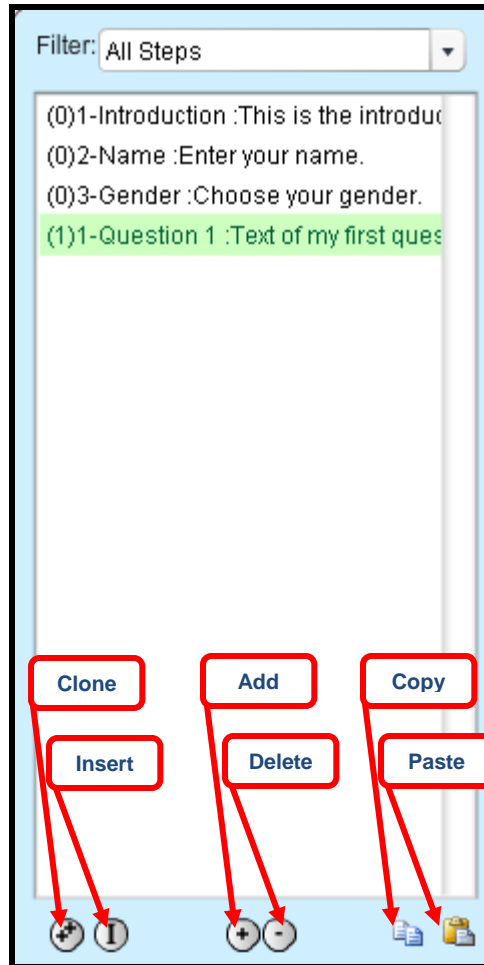


Figure 54: Template Interview Questions as pictured in the Question List under the Question Tab. Also pictured are the buttons for cloning, inserting, adding, deleting, copying, and pasting questions into this list.

ADD A

QUESTION:

The Add function in the Question List allows you to add a Question to the interview. To add a Question, simply highlight an existing Question in the Question List and select the Add button.

Note that an *added* Question will not be connected to any other existing Question. However, added Questions are assigned to a Step. An added Question's assignment to a Step will depend on where the Question has been added in the Question List. Once added, Questions are ordered in the Question List first by Step, then by name.

In Figure 55, the added Question is entitled "(0)4-Gender." This is because the Question entitled "(0)3-Gender" was the Question originally highlighted when the Add button was selected. Whereas in Figure 56, "(1)1-Question 1" was highlighted at the time the Add button was selected. Thus the Added Question has been assigned to Step (1) and is titled "(1)2-Question 1." Notice also that A2J Author[®] automatically

numbers the name of the Question. You will learn later in this chapter how to modify the names of questions (see the subheading Question Design Window, below).

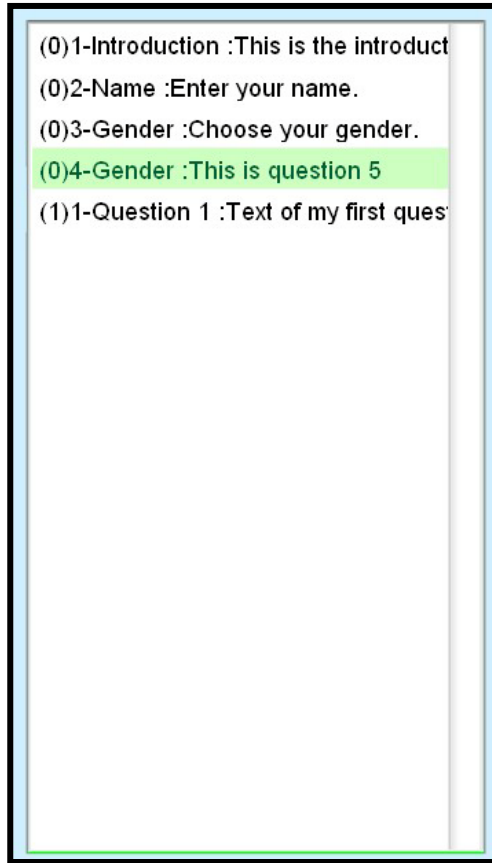


Figure 55(Left): “Add”-ed Questions are assigned to the same Step as the previous Question.

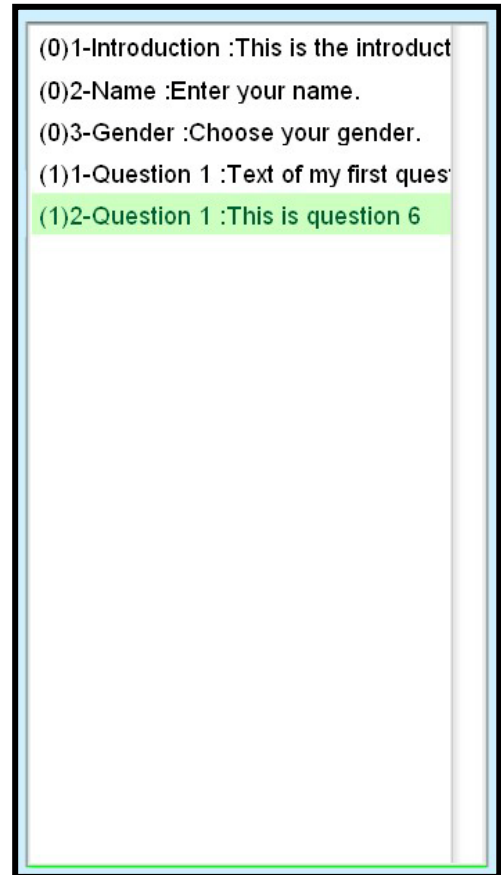


Figure 56(Right): The Add function gives an ordered name to the added Question according to what Question was highlighted at the time the Add button was selected.

INSERT A
 QUESTION :

The Insert function in the Question List allows you to insert a Question into the flow of the interview. So, while the Insert Question “adds” a Question, it also *connects* the Question to the surrounding two Questions (Figure 57). To Insert a Question, simply highlight an existing Question in the Question List where you want a Question inserted and select the Insert button.

The Question which was highlighted at the time the Insert function was selected is now connected to the Inserted Question. The Inserted Question is now connected to the Question previously listed subsequent to the highlighted Question. What this means in a practical sense is that by inserting a Question into a list you will effectively wipe-out any connection the highlighted Question had to any subsequent Questions.

The naming of the inserted Question and its assignment to a Step will occur as described above for added Questions (see Figure 55 and Figure 56 above.)

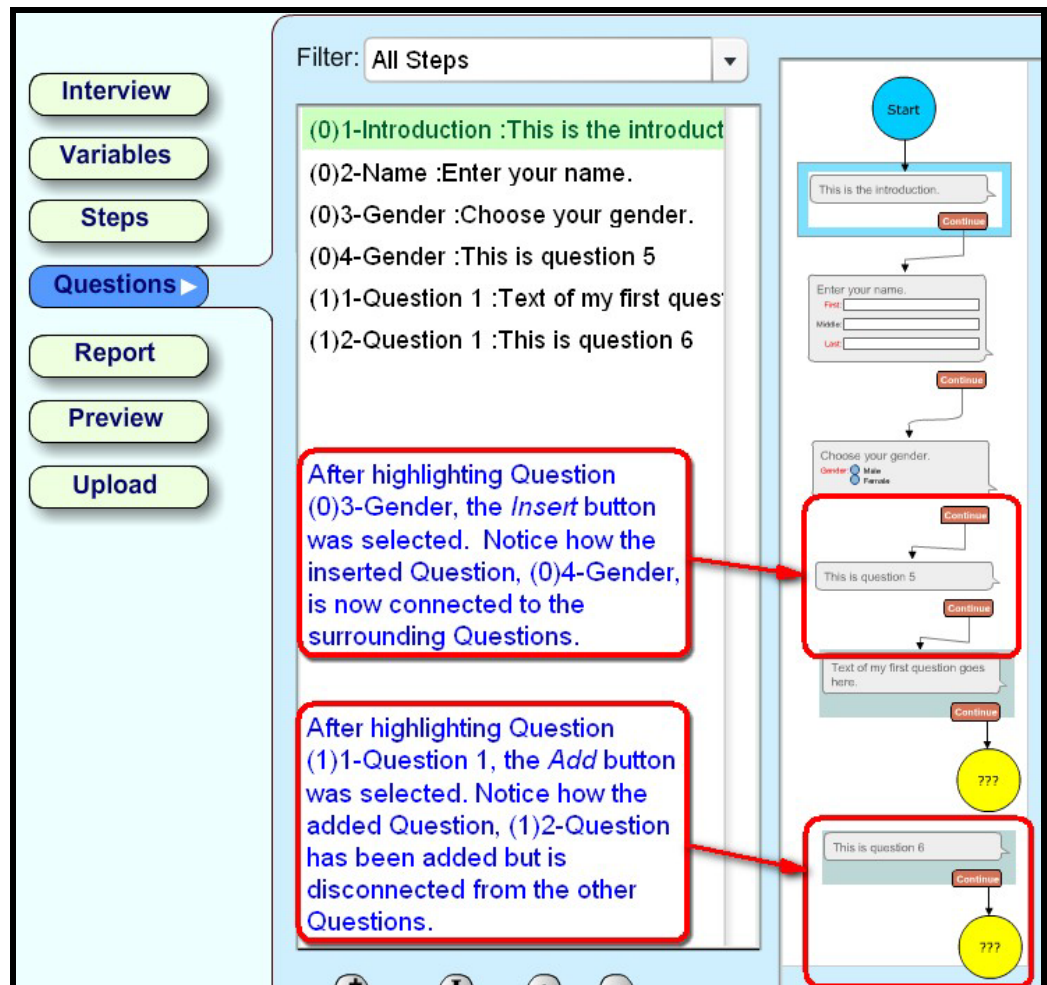


Figure 57: Add a *disconnected* Question or Insert a *connected* Question.

CLONE A QUESTION:

The Clone function in the Question List allows you to copy any Question in the interview. To Clone a Question, simply highlight an existing Question in the Question List and select the Clone button (Figure 58).

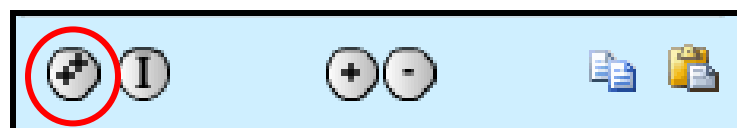


Figure 58: Clone function. Also pictured, Insert, Add, Delete, Copy, and, Paste.

A *cloned* Question will only be connected to the subsequent Question in the Question List (Figure 59). A cloned Question is also assigned to a Step according to where the

Question has been added in the Question List. However, cloned Questions are also given the exact name of the Question that was cloned, plus the suffix “(Copy 1).”

In Figure 59, the cloned Question is entitled “(0)2-Name(Copy 1),” because Question “(0)2-Name” was the Question highlighted when the Clone button was selected. Notice also that the cloned Question is only connected to the subsequent Question.

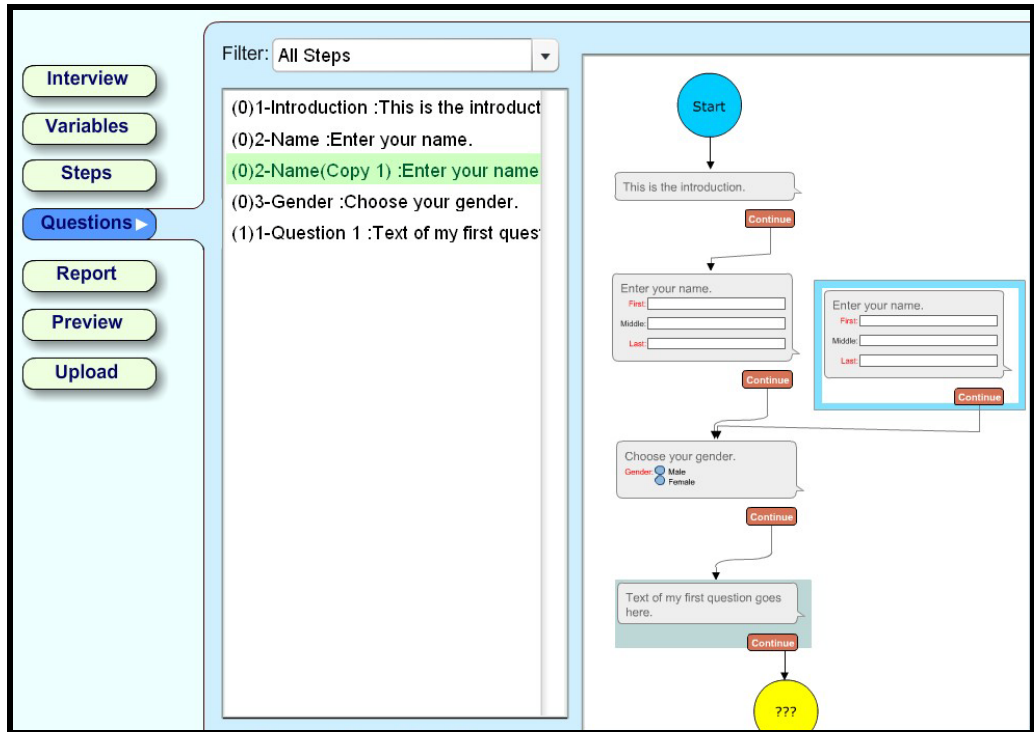


Figure 59: Cloned Question (highlighted).

DELETE A QUESTION :

The Delete function in the Question List allows you to delete any Question in the interview. To Delete a Question, simply highlight an existing Question in the Question List and select the “-” (minus) button (Figure 58). You will also be required to confirm the deletion by selecting “Yes” from the popup window (Figure 60).

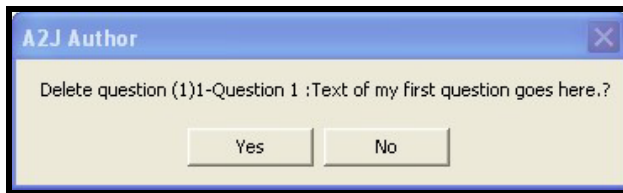


Figure 60: Safety pop-up for deleting Questions.

Note that when a Question is *deleted*, the surrounding Questions will now be connected to each other (Figure 61 and Figure 62) saving you the extra step of manually connecting the remaining questions together. Where Question “(0)2-Name” was deleted, Question “(0)1-Introduction” is now connected to Question “(0)3-Gender.”

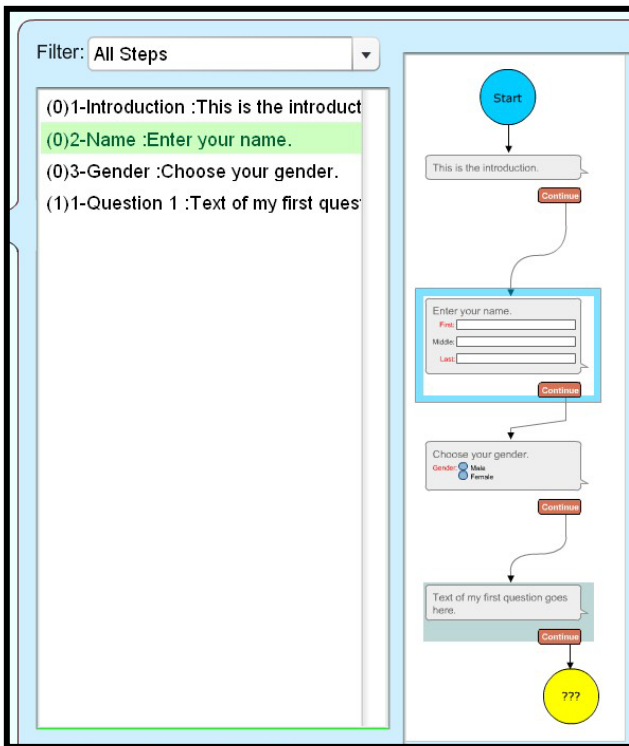


Figure 61 (above): Question (0)2-Name is selected for deletion.

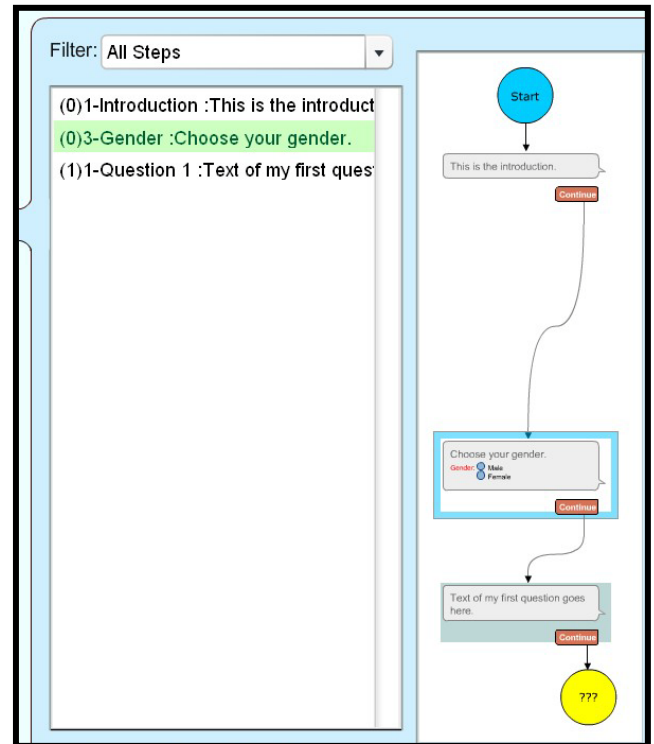


Figure 62 (right): Question (0)1-Introduction is now connected to Question (0)3-Gender.



You should not delete the Questions collecting name or gender. If you do, be sure to replace it with an equivalent. Gender must be collected to set the gender of the end-user's Avatar, and collecting the end-user's name up front allows you to later personalize the interview. For an online tutorial on setting the Avatar's Gender see:

<http://www.a2jauthor.org/drupal/?q=node/177>

For an online tutorial on personalizing Questions see:

<http://www.a2jauthor.org/drupal/?q=node/204>

**COPY &
PASTE A
QUESTION :**

The Copy and Paste functions in the Question List allow you to copy any Question or set of Questions in one A2J Guided Interview™ and paste them into another. Prior to copying and pasting, you should open the A2J Author® application twice (Figure 63). Open the file from which you would like to copy Questions in one application. In the other application open the file to which you would like to paste the copied Questions.

Highlight a Question or set of Question in the Question List and select the Copy button to Copy. Select multiple Questions by pressing the CTRL key while selecting

CREATING QUESTIONS

each Question. Highlight a Question in the Question List in the second open application and select the Paste button to paste.

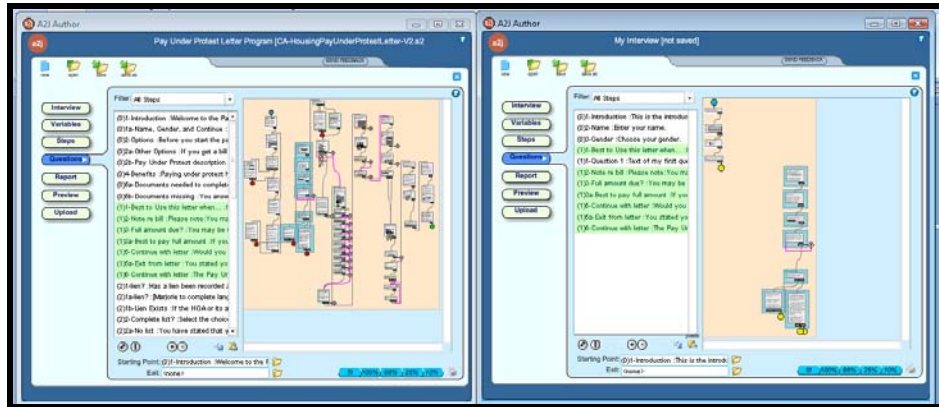


Figure 63: Two applications of A2J Author® open side by side to facilitate Copy and Paste.

Once you select Paste, you will be asked to confirm your selection (Figure 64). Select Yes to continue the Paste operation. Select No if you need to change your selection.

Questions retain the same titles once pasted (Figure 65). Questions can be reordered in the Question List by changing their names in the Question Design Window.

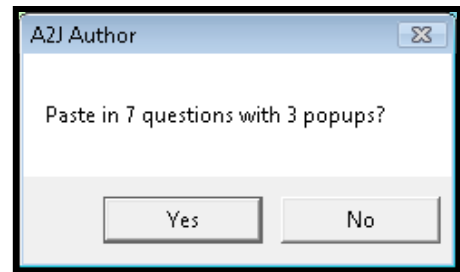


Figure 64: Paste confirmation dialog box

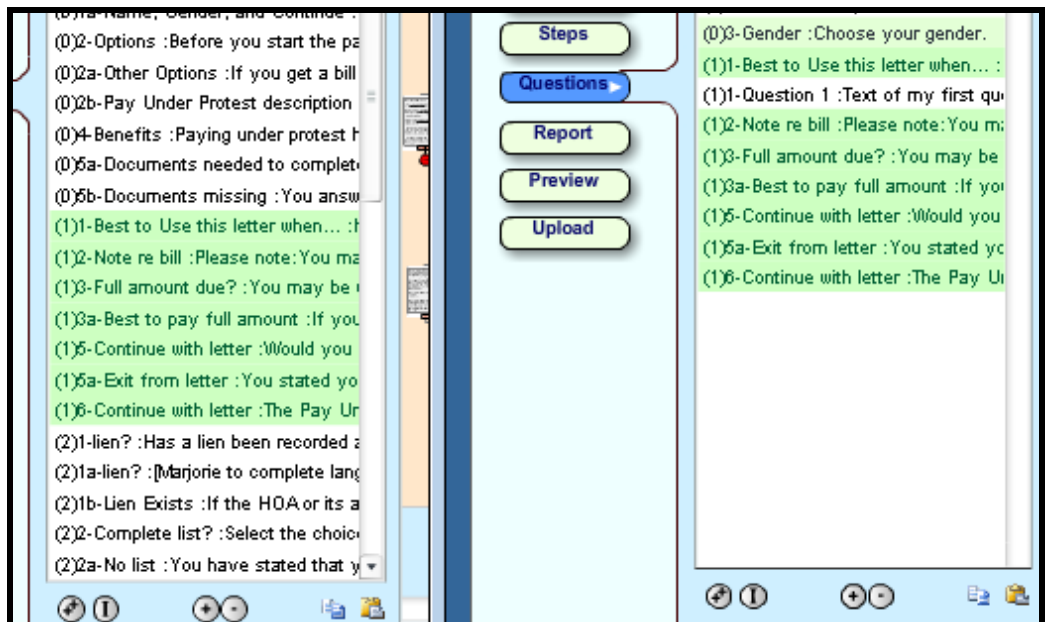


Figure 65: Questions copied from interview on the left into interview on the right retain same numbering scheme and names in the Question List.

Flow Chart

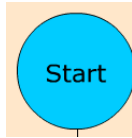
To the right of the question list, is a graphical map or flowchart depicting each of the interview Questions (Figure 66). Each box represents a single question. The colored shadow behind the box corresponds with the color assigned to a particular Step to which the question is assigned.

The flow of the interview is also pictured in the Flowchart. The flow of the Questions is depicted by a line leading from one Question to another Question. There are also several visual clues that aid in interpreting what is happening before or after a Question.

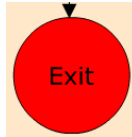
VISUAL CLUES:

Following is a list of definitions for each of the visual clues that may appear in the Question Flowchart:

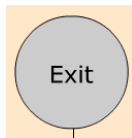
BLUE "START" CIRCLE. This symbol indicates the first question in an interview. It can be changed by using the Starting Point field at the bottom of the screen (Figure 67).



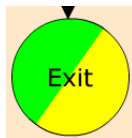
RED "EXIT" CIRCLE. This symbol indicates the unsuccessful ending of an interview. It is shown when the [Exit-User does not qualify] option is set under a button in a Question. When an interview is exited the browser closes and the end-user is redirected to a URL that is configurable.



GRAY "EXIT" CIRCLE. This symbol indicates the location of the Exit question. It is set in the Exit Question field at the bottom of the screen (Figure 67). When an end-user selects the Exit button in the main navigation bar they will be redirected to the Exit question.



GREEN/YELLOW "EXIT" CIRCLE. This symbol indicates the end of a partially completed interview (Figure 67). It is shown when the [Exit-Save



Incomplete Form] option is set under a Button in a Question. When this circle is reached the end-user's incomplete data file will be transmitted to the LawHelp Interactive server.

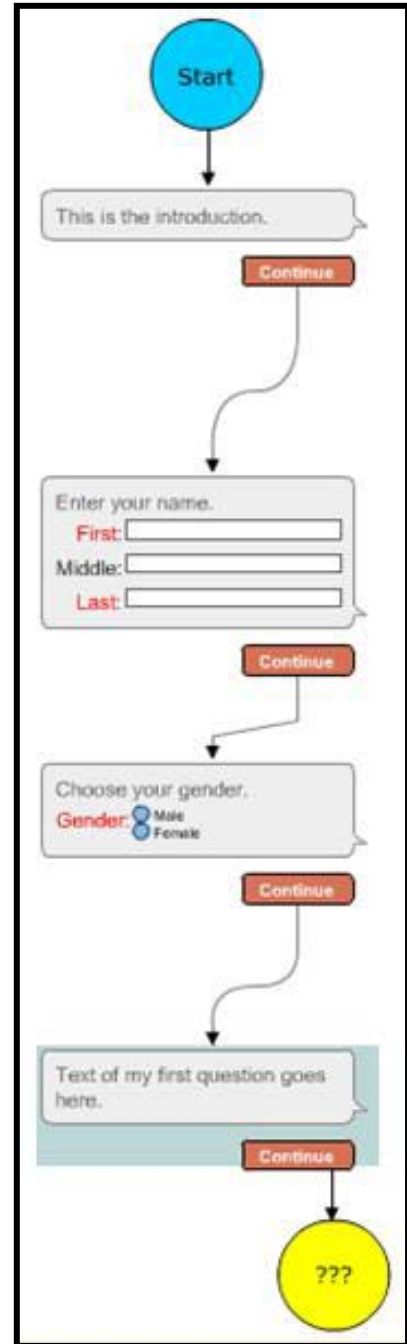


Figure 66(above): Default Questions, as they are depicted in the Question Flowchart.

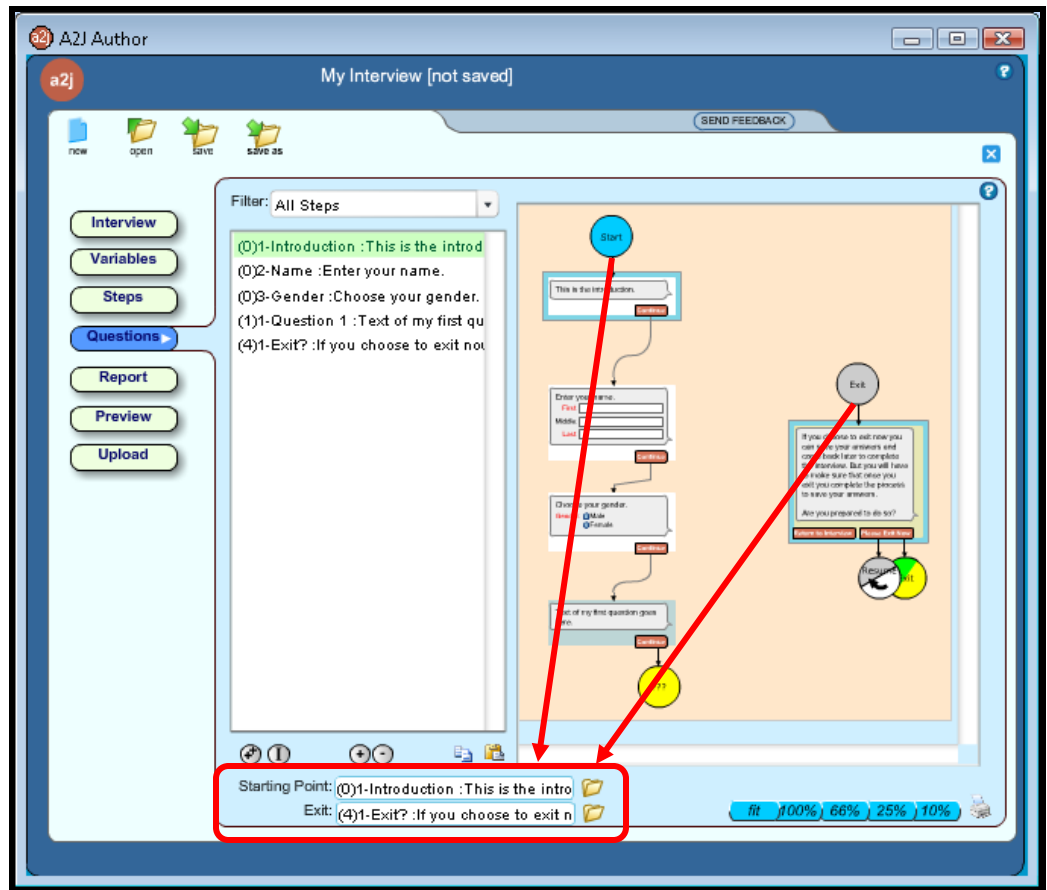
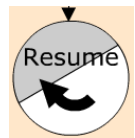
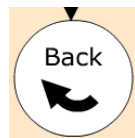


Figure 67: Starting Point selector and Exit Question selector.

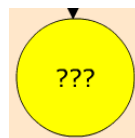
GRAY/WHITE “RESUME” CIRCLE. This symbol indicates that the end-user can return to the Question they were in just previous to selecting the Exit button in the main navigation bar (Figure 67). It is shown in the Flowchart when the [Exit-Resume Interview] option is set under a button in a Question. Thus, it allows the end-user to resume the interview if they decide against exiting before the interview is completed.



WHITE “BACK” CIRCLE. This symbol indicates that the end-user can return to the Question they were in just previous to the present Question. It is shown when the [Back to prior question] option is set under a button in a Question. This button feature provides authors an alternative to the Back button which normally appears in the main navigation menu for an online interview.



YELLOW “???” CIRCLE. This symbol indicates that a button click has no destination assigned to it. It is shown when the [no where] option is set under a button in a Question. A finished interview should not have any yellow “???” circles.



GREEN “DONE!” CIRCLE. This symbol indicates the end of a successful interview.



It is shown when the [Success-Process Form] option is set under a button in a Question. When this circle is reached the end-user’s input will be transmitted to the LawHelp Interactive server. Note: Modifications can be made to a program file that will allow the end-user’s input to be directed elsewhere, such as a case management or e-filing system.

PURPLE “?” DIAMOND. This symbol indicates that there is advanced logic occurring inside that question. The advanced logic can be either conditional branching or setting a variable to a value based upon a condition.



inside that question. The advanced logic can be either conditional branching or setting a variable to a value based upon a condition.

BLACK CIRCLE ARROW.



This symbol indicates that the designated Question is part of a Repeat Dialog.

Furthermore, it indicates that the variables contained in that Question will be indexed according to the value of the Counting Variable. This symbol will only appear if the author indicates the Counting Variable in the Counting Variable field in each Question that is part of the Repeat Dialog.

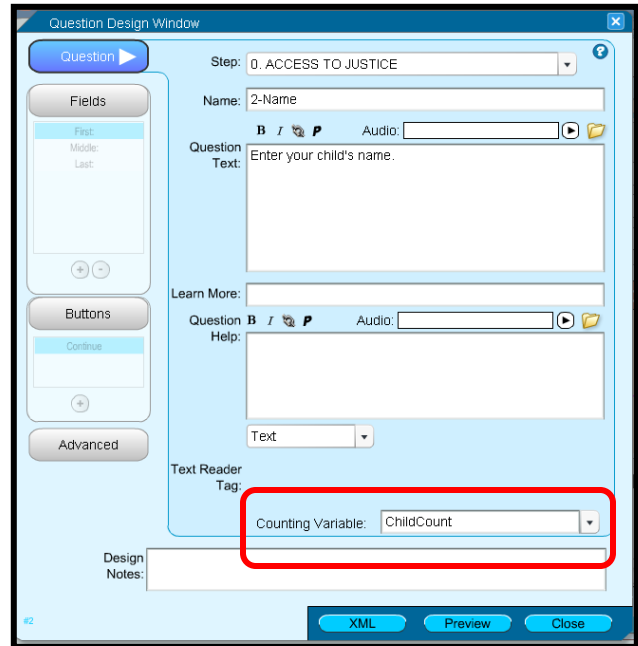
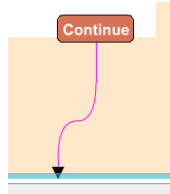


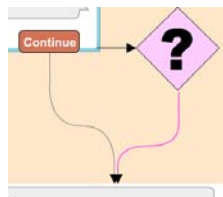
Figure 68: Counting Variable field.

PURPLE LINE (FROM A BUTTON TO A QUESTION.) The line represents that a counting variable has been set under the button above the line. It also indicates that the next Question – the Question to which it is pointing -- is the logical starting point to begin collecting variables in a Repeat Dialog.



The line represents that a counting variable has been set under the button above the line. It also indicates that the next Question – the Question to which it is pointing -- is the logical starting point to begin collecting variables in a Repeat Dialog.

PURPLE LINE (FROM A PURPLE “?” DIAMOND TO A QUESTION.) This line represents that logic contained in an advanced condition may cause the end-user to be directed to an alternative Question. Thus the purple line is a conditioned flow, whereas a black line connecting Questions is a set flow.



This line represents that logic contained in an advanced condition may cause the end-user to be directed to an alternative Question. Thus the purple line is a conditioned flow, whereas a black line connecting Questions is a set flow.

**ZOOM AND
FILTER:**

You can also zoom in on the flowchart to aid or focus your view on a specific Question or set of Questions using either the Zoom Tools (Figure 69) or the Filter (Figure 70). The Zoom Tools are located in the bottom right hand corner of the screen under the Question Tab. The Filter is located directly above the Question List.

The Zoom Tools include the following zoom settings: 10% view, 25% view, 66% view, 100% view, and “fit.” Selecting “fit” will fit the entire contents of the interview within the Question Flowchart frame. Selecting 10% will increase the size of the interview by 10%, and so on, until 100% which usually results in only one Question fitting within the Question Flowchart frame.



Figure 69: Zoom Feature

The Filter allows you to zoom in on a particular Step. Selecting the down arrow reveals a drop down menu from which you can select to view “All Steps” or any one particular Step. The Filter will reduce the view of both the Question List and the Question Flowchart according to the selection. The Flowchart will highlight all of the Questions under the selected Step using the color that corresponds to the associated Step, as shown under the Steps Tab. The Filter works especially well when the author arranges the Questions in the Flowchart into columns according to Step.

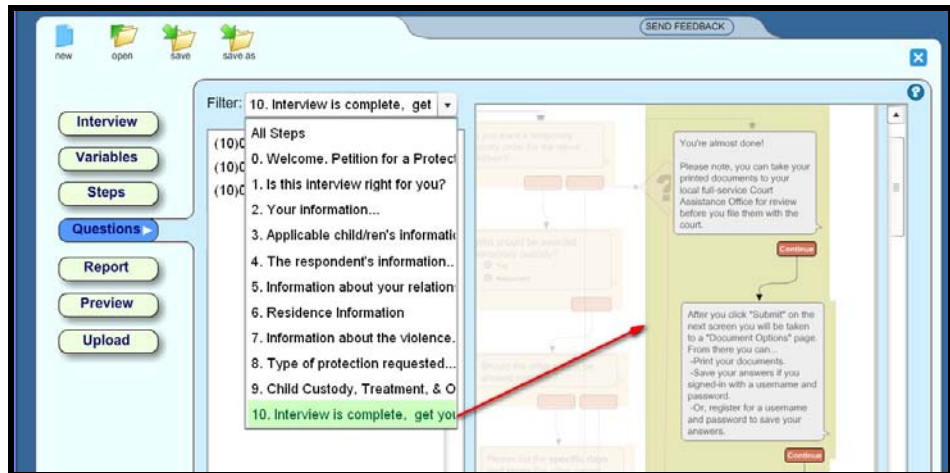


Figure 70: View of Flowchart filtered to show only those Questions contained in Step 10.

**ORGANIZING
THE
FLOWCHART:**

The Flowchart is a visual aid and many authors have found that organizing Questions into ordered columns according to Step help keeps a sense of order to the interview. Several Questions can be moved at once by using the CTRL function on your keyboard along with mouse clicks. It should be noted, however, that while you can move Questions within the flowchart, moving them has no effect on the order in which end-users will visit the Questions.

Question Design Window

The Questions Design Window is the hub of all design activity for a particular Question. Each of the following tabs handles a particular component of the design: Question, Field, Buttons, and Advanced. The functionalities of each tab are discussed in detail below under separate subheadings.

Question Tab

By double-clicking on a Question in the Question List or Flowchart you reach the Question Design Window. The first tab to appear in that window is the Question Tab. Under the Question Tab you can assign the Question to a Step; modify its name, text, properties (bold/italics), “Just-in-Time Learning” features (links/popups/learn more), and design notes; add audio files; associate a Counting Variable; and select Preview.

NAMING AND
ASSIGNING A
QUESTION:

By selecting the down arrow to the right of the “Step” label, you will reveal a drop-down menu from which any of the previously designed Steps can be selected (Figure 71). By assigning a question to a Step, you modify where in the Question List the question will appear and what colored background the question will have in the Question Flowchart.

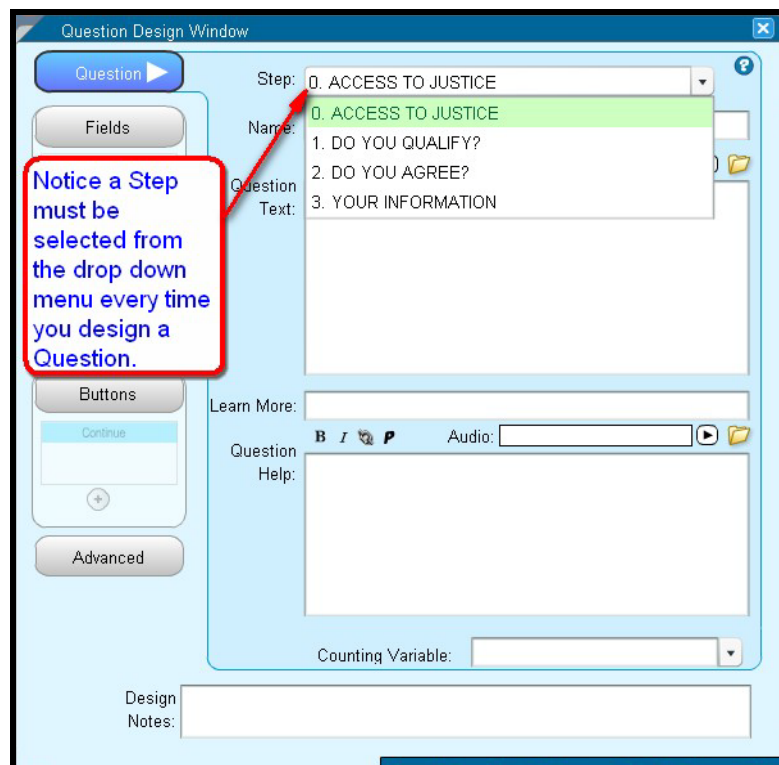


Figure 71: Step Menu under the Question Tab.

You will notice in Figure 72, that the Questions have also been sorted according to a numbering scheme (e.g., Question 2-2 under Step (2) follows Question 2-1 under Step (2).) You can design numbering schemes in the Name field.

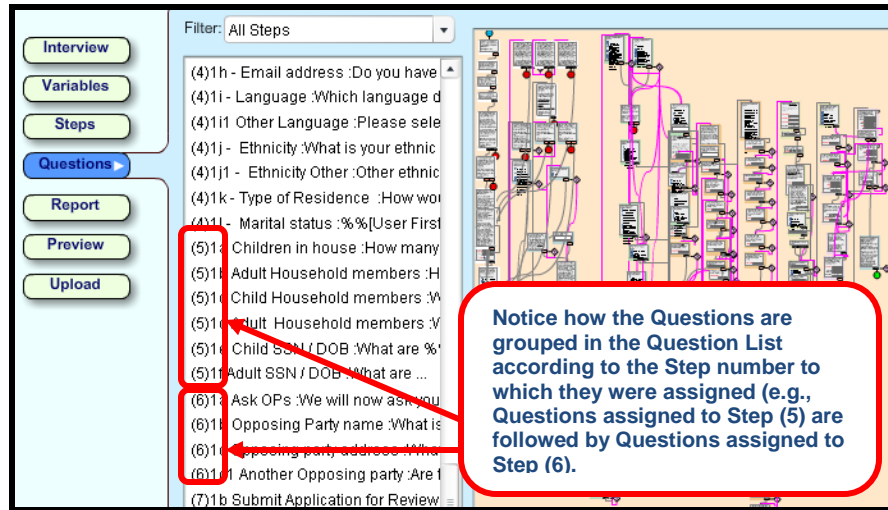


Figure 72: Questions Tab: Questions List.

Beneath the Step selection is the Name field (Figure 73). The first purpose of the Name field is to order the question in the Question List. So, most authors use a naming prefix such as 1-, 1a-, 1a1-, 1a2-, 1b-, 1b1-, 1b1A-, and so on; or something similar. Using a convention for a prefix ensures that your Questions are sorted in an orderly manner in the Question List.

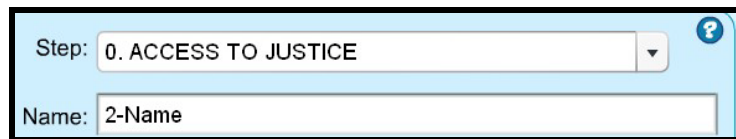


Figure 73: Name field in the Question Design Window's Question Tab.

The second purpose of the Name field is to provide a brief label to the question, one that will assist you in later locating the question in the Question List, such as -Name, -Employer name, -Income, etc.. See Figure 74, below, for a good example of a list of question names which have used a naming scheme to order the questions.

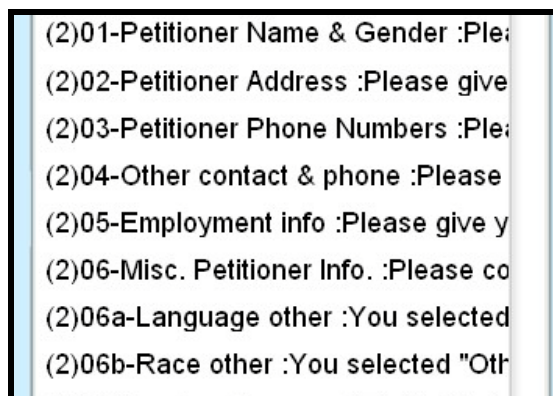


Figure 74: Question List with ordered naming scheme.



The presentation of Questions is not tied to how Questions are numbered. While associating a question with a particular Step sorts the questions in the Question List, the association is not a guarantee of the order in which each Question will appear to the end-user. The destination of each Question is individually assigned using programming associated with Buttons and Advanced Conditions. For more information on setting the destination of a Question using a Button click, or branching Question sets according to Advanced Conditions, see the subheadings in this chapter entitled, Buttons and Advanced Conditions.

QUESTION
TEXT &
PROPERTIES:

The Question Text box allows you set the question's text. Simply click in the white field to begin typing the text of your question. Text in the question can be bolded or italicized by highlighting the desired text and then pressing the (B) or (I) button above the text entry box (Figure 75).

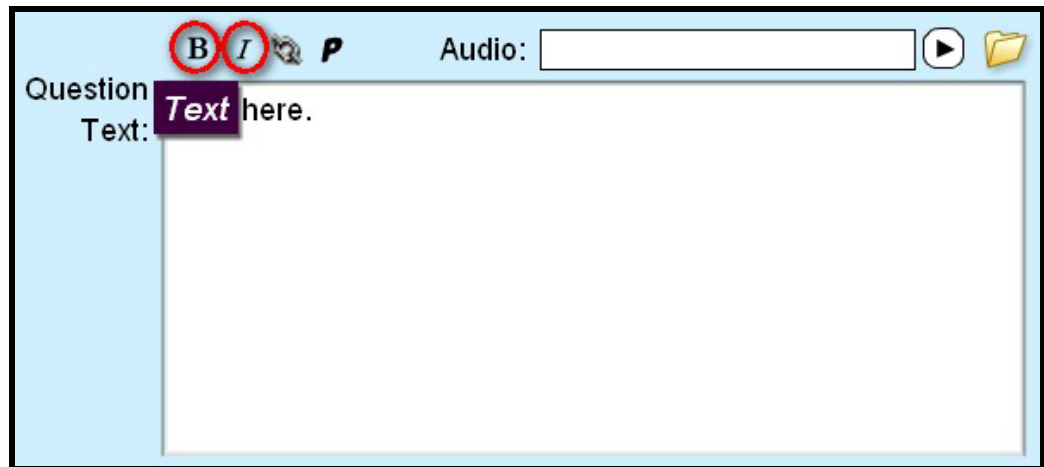


Figure 75: Highlight the desired text; then select either B to Bold or I to italicize the selected text.

JUST-IN-TIME
LEARNING
FEATURES:

There are three features that allow you to deliver help to the end-user during an interview. They are: “Learn More” Prompts, Hyperlinks, and Pop-Up text.

“LEARN MORE” FEATURE

The Learn More feature works well for answering questions or addressing issues that are better left out of the instruction or text included in the actual question. It allows you to anticipate the difficulties an end-user may experience in completing the question and provide them additional relevant information. The Learn More feature inserts a prompt to appear as a thought bubble to the right of the User's Avatar. When the end-user presses the Learn More button associated with the bubble, the Avatar Guide displays a response using one of the three following Question Help methods chosen by the author of the interview: Text, “Show Me Video,” or “Show Me Graphic.”

Question Help Text: For an example of how you might use a Learn More prompt with Question Help text, see Figure 76 and Figure 77 below.

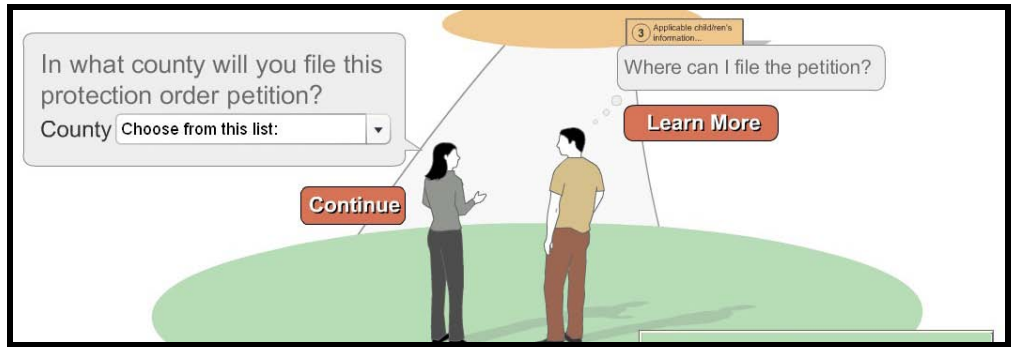


Figure 76: Learn More prompt pictured as a thought bubble.

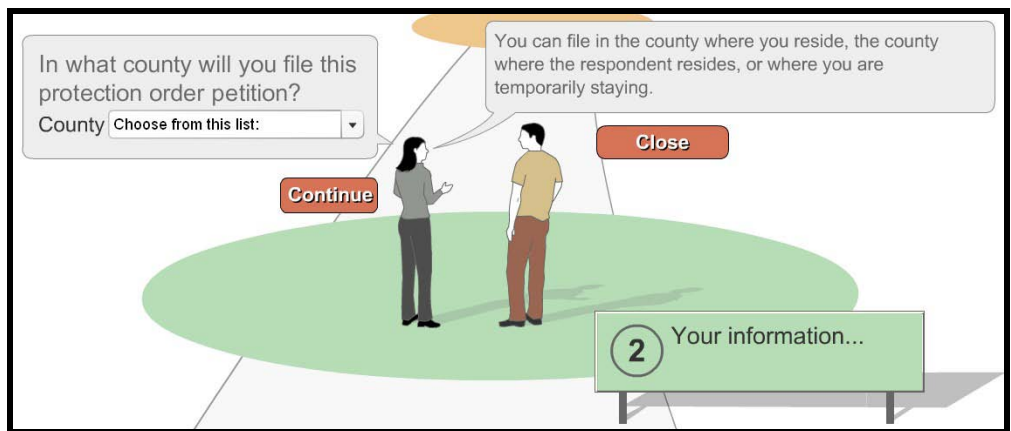


Figure 77: Question Help text pictured as a speech bubble from the Avatar.

The Learn More prompt is typed under the field labeled “Learn More” which appears below the Question Text field; and the response of the Avatar Guide is typed into the field labeled “Question Help” (Figure 78). Text can be bolded or italicized.



Figure 78: Learn More prompt and Question Help text fields.

Question Help Show Me Graphic: To include a Show Me Graphic in the Question Help, select “Show Me Graphic” from the Question Help drop-down menu as shown in Figure 79.

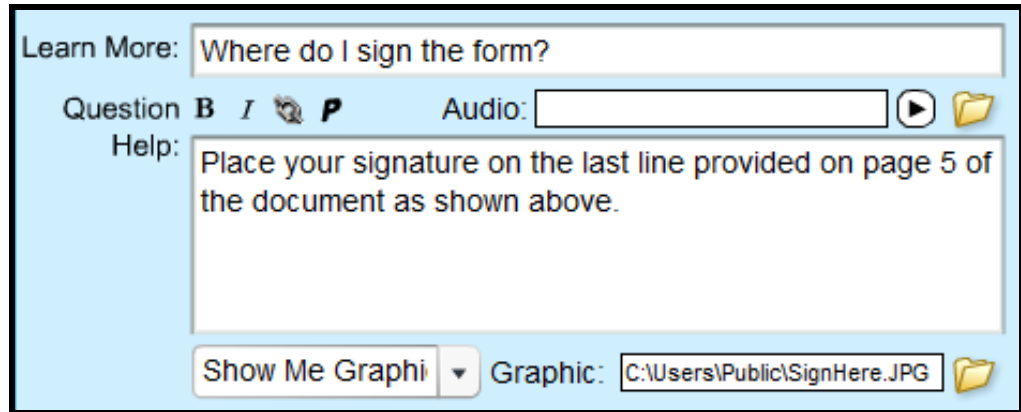


Figure 79: Show Me Graphic selected in Question Help drop-down menu and graphic file (.jpg) attached.

Once “Show Me Graphic” is selected from the drop-down menu for Question Help, use the yellow folder icon to browse for the graphic file that you would like to include in the Question Help. Please note that you must use one of the following graphic file types in order for the Show Me Graphic feature to work: **.jpg**, **.png**, or **.gif**. In addition to the image, you may also include caption text as noted in Figure 79.

Figure 80 and Figure 81 demonstrate how you might use the Show Me Graphic feature. From the end-users perspective, the Show Me Graphic image will be scaled to fit the Show Me Graphic window.

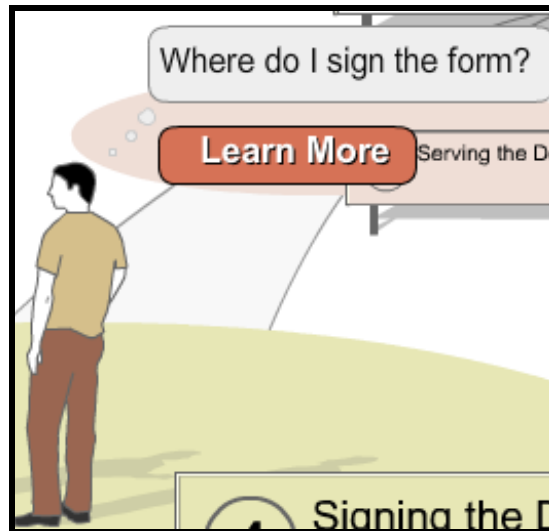


Figure 80: One way to use a ShowMe Graphic is to illustrate where a form should be signed.

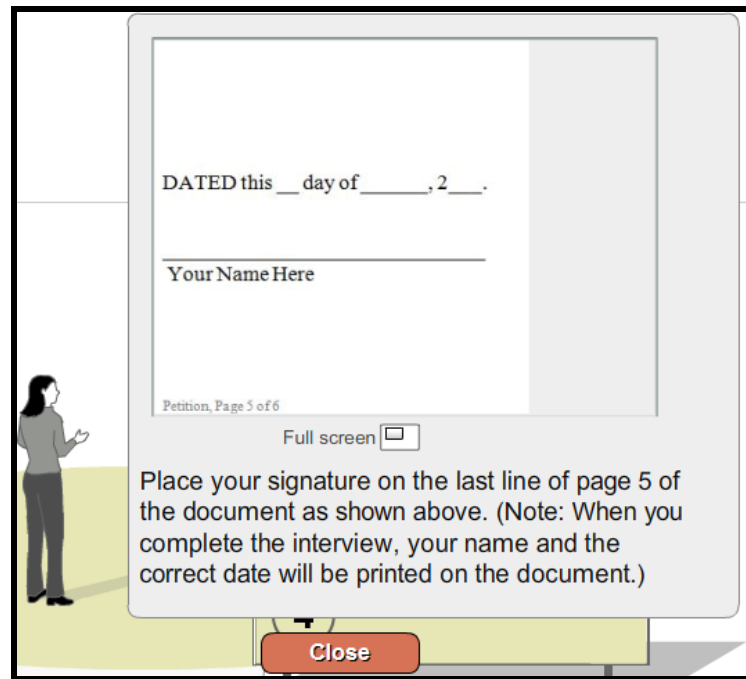


Figure 81: Show Me Graphic window in “Normal Size” mode with caption text.

End-users are given the option of enlarging the graphic by selecting the full screen button as shown in Figure 81. (To reduce the image, they can select the option “Normal Size” as shown in Figure 82.) “Full Screen” mode includes a scroll bar in the event the overall size of a graphic is larger than the given space.

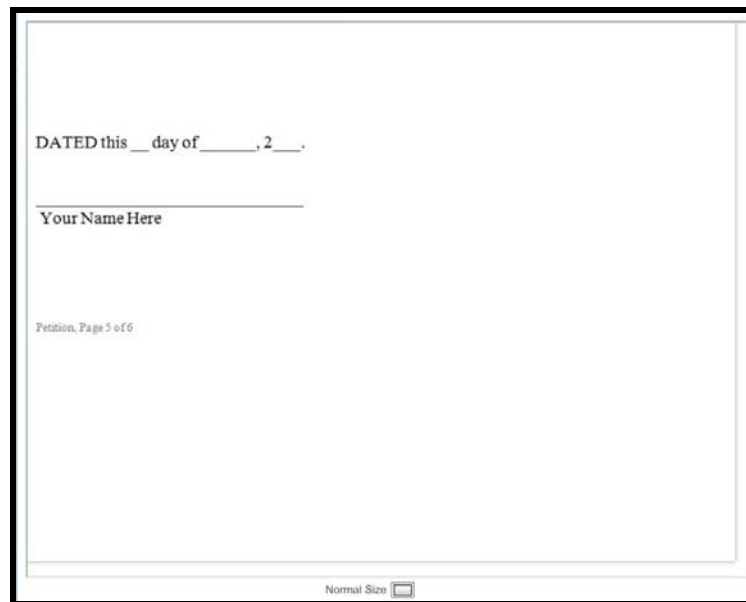
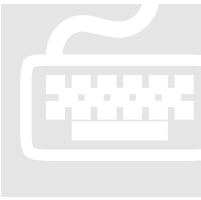


Figure 82: Show Me Graphic in Full Screen mode. "Normal Size" returns end-user to previous view.

Show Me Graphic Attributes	Description
Allowable File Types	.jpg .png .gif
Maximum File Size (A2J Author)	100 MB
Rendering In Show Me Graphic Window	Normal Size = scaled to fit Full Screen = not scaled (scroll bar provided)



While A2J Author® only places a file size limitation of 100 MB, the current upload limitation imposed by the LHI server is 16MG. Thus, you may wish to reduce the file size of your graphics where possible. To reduce the size of a graphic for use in Show Me Graphics, you may first want to crop the image in order to remove any unnecessary portions of the image. In addition, a number of free online resizing programs are available for reducing the size of images. Note: Reducing an image's file size also reduces quality. Thus, it simply may not be possible to reduce the size of some images. You should test any reduced image in A2J Author®'s Preview Mode before you decide to use it in the interview.

Question Help Show Me Video: To include a Show Me Video in the Question Help, select "Show Me Video" from the Question Help drop-down menu as shown in Figure 83.

The screenshot shows a software interface for creating a question. It includes a 'Question Text' field with the text 'You need to serve the Complaint promptly after it is filed.' Below this is a 'Learn More:' field with the text 'How much time do I have?'. Underneath is a 'Question Help:' field with the text 'You have 30 days to serve the Complaint.' At the bottom, there is a dropdown menu labeled 'Show Me Video' which is currently open, and a 'Video:' field containing the file path 'view\ServeComplaint.flv' with a folder icon to its right.

Figure 83: Question Help: Show Me Video option.

Once “Show Me Video” is selected from the drop-down menu for Question Help, use the yellow folder icon to browse for the video file that you would like to include in the Question Help. Please note that you must use the Flash video file type (.flv) in order for the Show Me Video feature to work. In addition to the image, you may also include caption text as noted in Figure 83.

Figure 84 and Figure 85 demonstrate how you might use the Show Me Video feature. The Show Me Video will be included in the Question Help along with caption text.

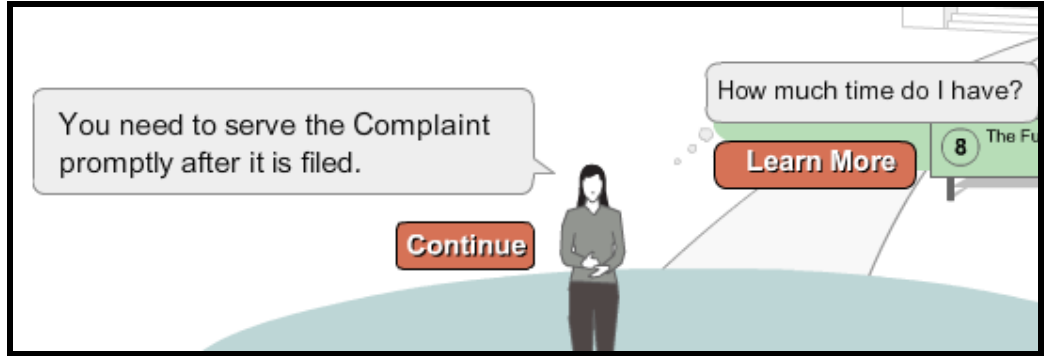


Figure 84: Learn More Prompt for a Show Me Video.



Figure 85: Video Panel and controls in the Question Help Show Me Video option.

End-users are given the option of enlarging the video by selecting the full screen button as shown in Figure 85. The video is scaled to a ratio of 4:3 in the enlarged video panel. To reduce the video size, they can select the option “Normal Size” as shown in Figure 86. In addition to the Full Screen/Normal Size option, Show Me Video includes a restart button, a pause/play button, and a volume control bar.

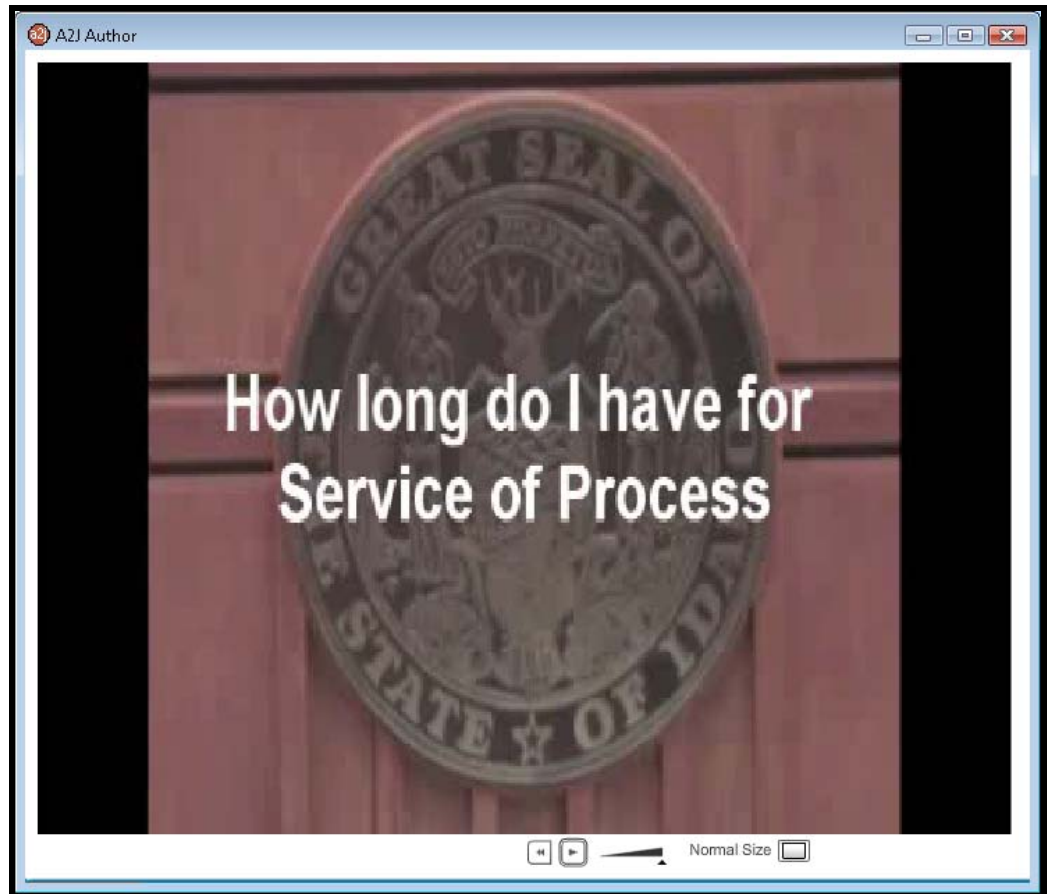


Figure 86: Show Me Video in the Full Screen mode.

HYPERLINKS

Hyperlinks can be used to link a word or phrase in a Question or Question Help to navigate an end-user to external content that is accessible through a normal web browser. A Hyperlink is created by first selecting the text that you want hyperlinked. Then, the hyperlink format button is selected, followed by entering a URL (web address) in the “Website address” field (Figure 87 and Figure 88).

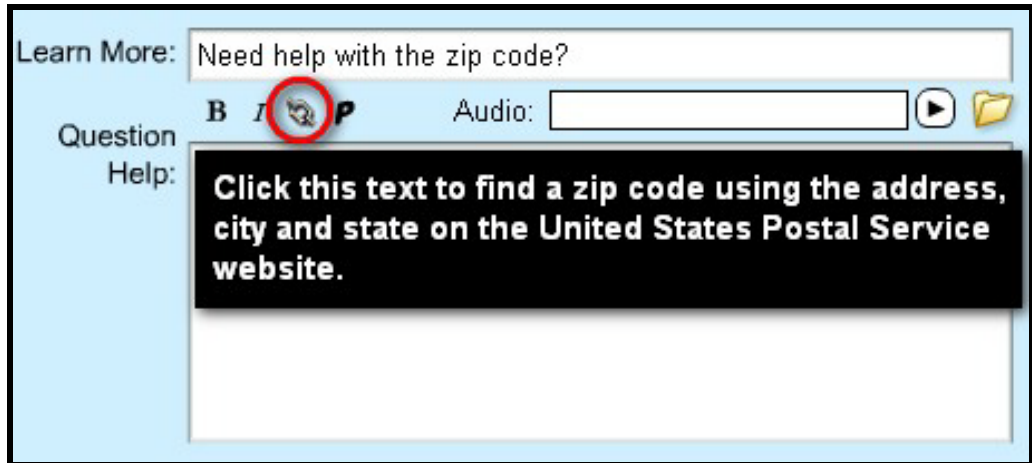


Figure 87: Highlight text to be hyperlinked and select the Hyperlink format button.



Figure 88: Enter the URL (web address) in the Website address field.

The result is that the end-user will be directed to the defined URL when they click on the hyperlink (Figure 89 and Figure 90). All the end-user must do to return to the interview is close the browser of the external website (Figure 90).



Figure 89: Example of a Hyperlink in Question Help.

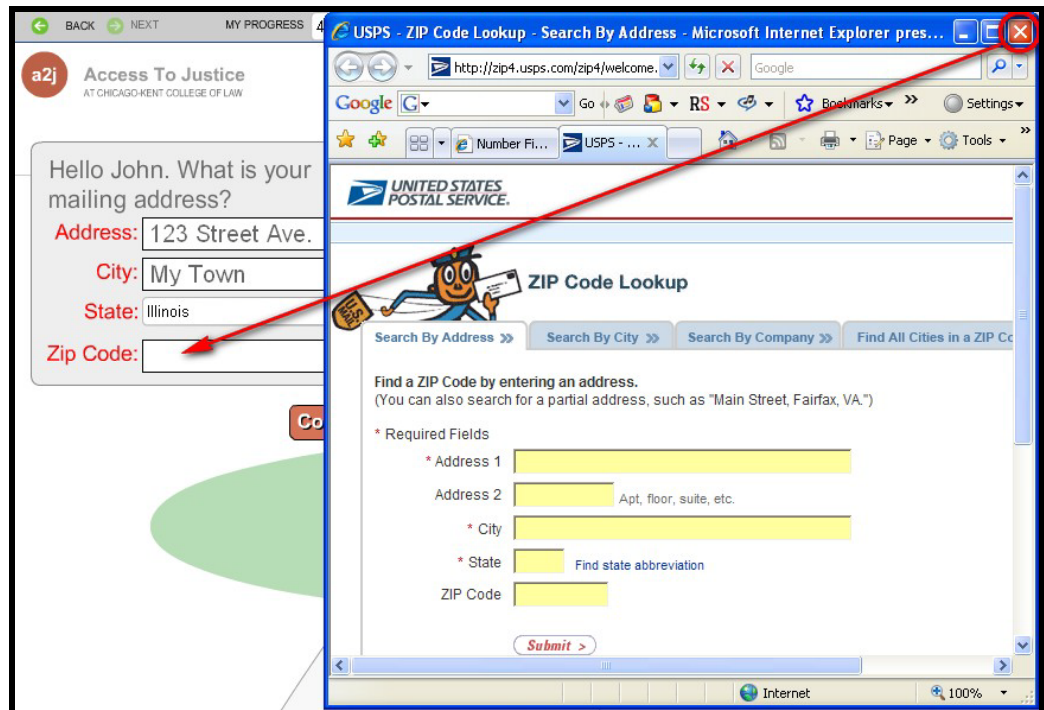


Figure 90: The end-user can easily return to the interview by simply closing the browser.

POP-UP TEXT

The Pop-up text feature allows for a dialog of help text to be displayed when the end-user presses on an underlined phrase. Thus, the Pop-up feature works in a similar fashion as the Hyperlink. Unlike hyperlinks, which are blue, Pop-up links appear as a red, underlined word or phrase.

To associate text in a Question, or text in a Question Help, with a Pop-up feature, highlight the word or phrase that you want linked to pop-up text. Then, press the pop-up format button (Figure 91). Finally, type the text that you want the end-user to see when they click on the phrase you previously selected to create the Pop-up.

Note, that the text in the Pop-up can also be formatted to include bolded, italicized, or hyperlinked words or phrases. In the end, the end-user will notice that pop-ups are associated with words or phrases that are both in red and are underlined, representing a hyperlink to pop-up text (Figure 92).

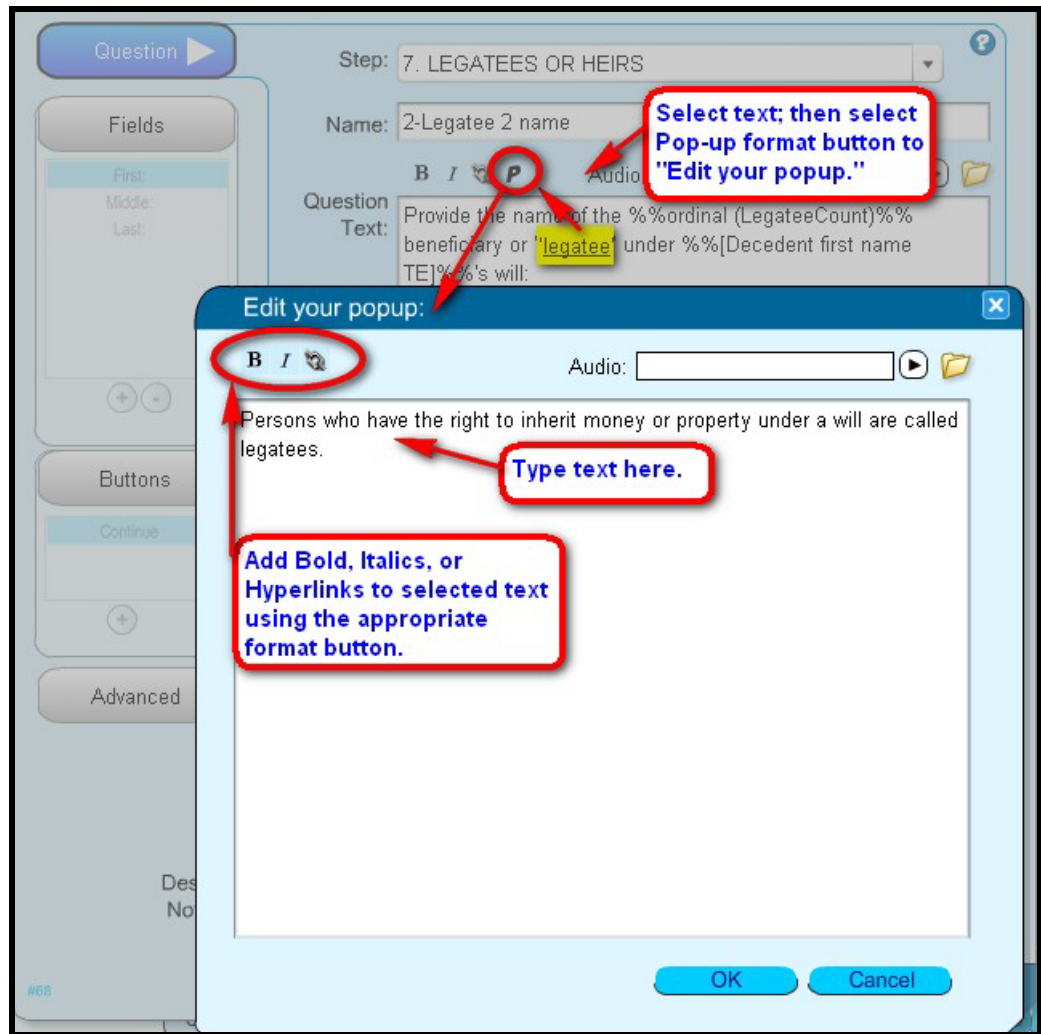


Figure 91: Pop-up button and Edit your popup design window.

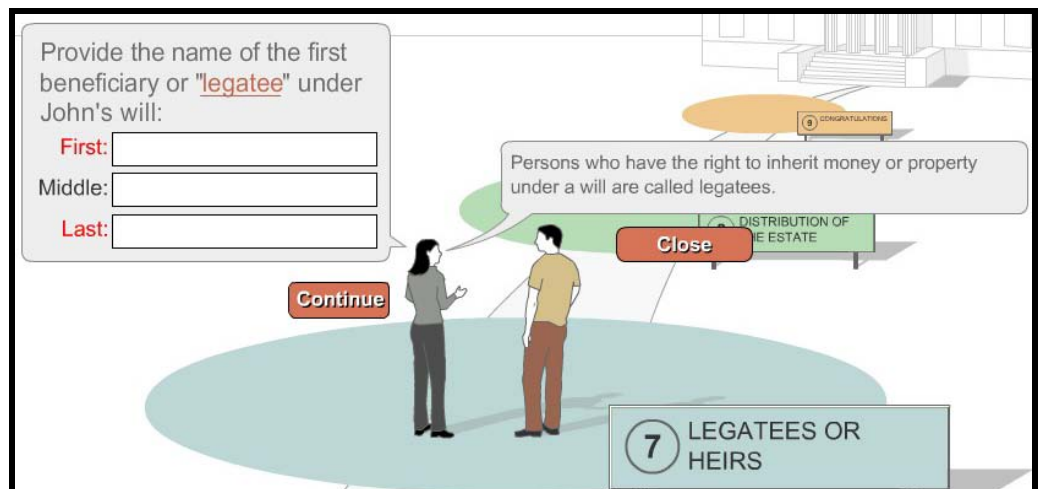


Figure 92: Pop-up text appears in the same location as Question Help text (just above the Avatar's head.)

 ADDING

 AUDIO :

Under the Question Tab you will also find a location to link audio (.mp3) files to Question text and Question Help text. (Audio files can also be linked to Pop-ups and Prompts.) You will notice an Audio field and yellow file folder icon in each of the text editing locations for the above types of text (Figure 93). By selecting the icon, you can browse your computer's file folders to search for the desired audio (.mp3) file. Double-clicking on the desired file will attach the audio (.mp3) file to the designated Audio field.



Figure 93: Select the yellow file folder icon next to any Audio field to attach an audio (.mp3) file for the associated text.

When audio clips are attached to an A2J Guided Interview™, the audio clips will automatically play when the associated text appears during the course of the A2J Guided Interview™. The end-user will have the option to “stop” the audio or turn off the audio for the entirety of the interview. The end-user may also pause and rewind the audio as well as adjust the volume from the audio control box. (Figure 94).

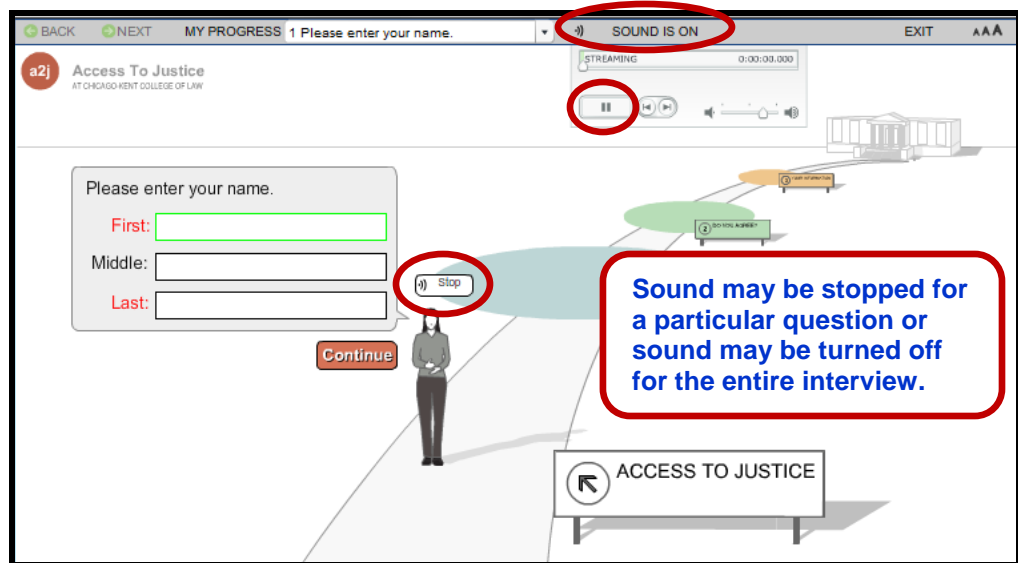


Figure 94: Sound can be “stopped” for a particular Question or turned off for the entire interview.

A detailed instruction guide on how to create audio files and attach audio clips to an A2J Guided Interview™ is found under the chapter entitled Adding Audio.

 COUNTING

 VARIABLES :

A2J Author® allows you to repeat (or loop) a Question or series of Questions in order to collect multiple values for similar types of information (e.g., names and amounts of assets, names and birthdates of all children, etc.) The program does this by associating a Counting Variable with a Repeat Dialog. A Counting Variable is associated with a

Question by entering the name of the Counting Variable in the field provided under the Question Tab (Figure 95).

The Counting Variable keeps track of the number of times the Repeat Dialog (or Loop) has been repeated. The number associated with a particular loop constitutes the value of the Counting Variable. That value is then appended to each variable name used in a Question which is part of that loop.

For example, in a Repeat Dialog which collects the names of children under a variable entitled “Child first name TE” and uses a Counting Variable entitled “ChildCount,” the variable name will be appended each time with the following: “#ChildCount.” If the Repeat Dialog were repeated three (3) times (because there happened to be three (3) children, the variable names for the each child’s first name would look like the following: Child first name TE#1, Child first name TE#2, and Child first name TE#3.

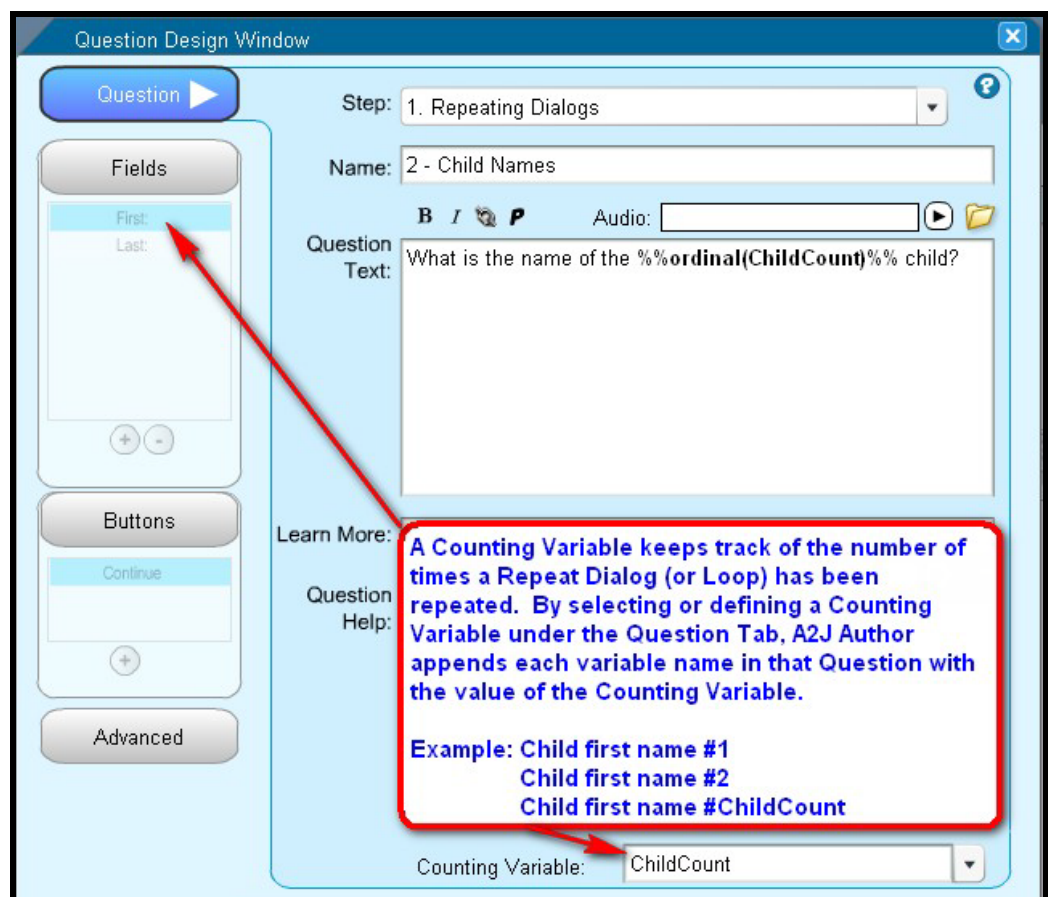


Figure 95: Counting Variable field in the Question Design Window’s Question Tab.



A training module for creating Repeat Dialogs is available at:

<http://www.a2jauthor.org/drupal/?q=node/233>

See also the subheading in this chapter entitled Repeat Dialogs.

DESIGN
NOTES:

The Question Tab also provides a Design Notes field, which is simply another location to keep notes regarding the construction of the interview. Authors often use this space to note that “conditions” have been included in the Question (Figure 96)

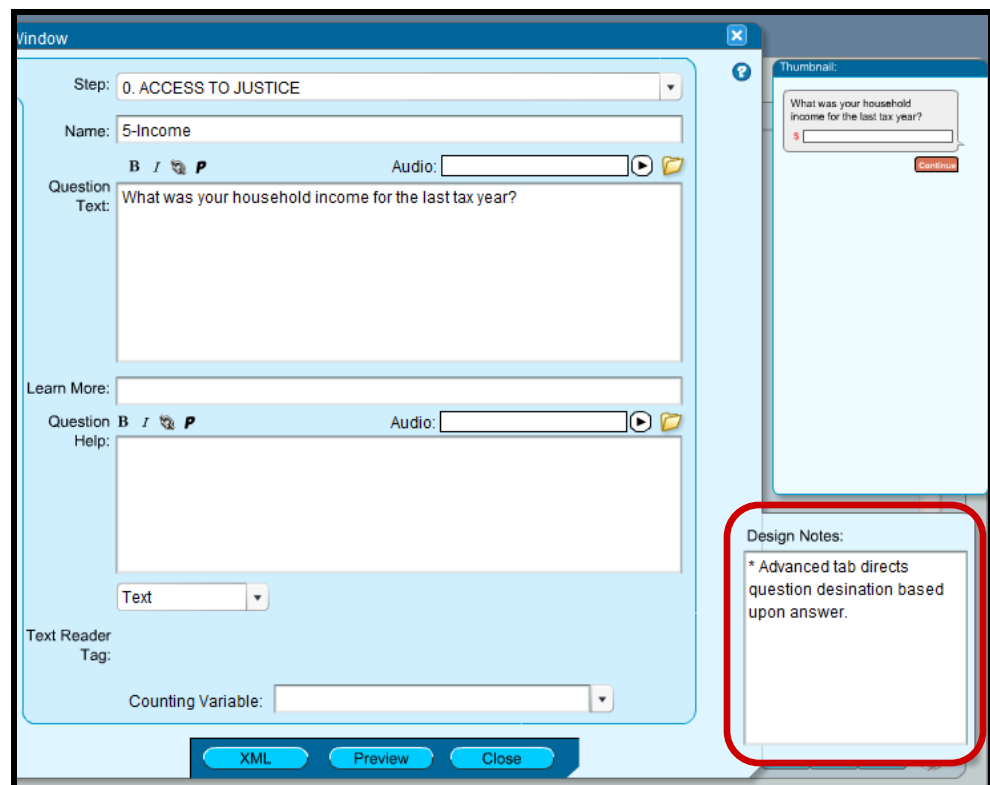


Figure 96: Add Design Notes for reference. Select “Preview” to see the Question in action.

PREVIEW
BUTTON:

The “Preview” button under the Question Tab (Figure 96) allows you to see the Question in action as the end-user will eventually see it when published. Previewing is a good way to troubleshoot advanced conditions written in that Question and subsequent Questions. For more on troubleshooting under the “Preview” mode, see the “Preview Mode” chapter.

Fields Tab

The Question Design Window provides a Fields Tab that will allow you to add fields within each question to collect data. A field type represents the *format* of the field in which the data is entered.

There are six basic categories of field types available for use in Questions: 1) Text Fields; 2) Number Fields; 3) Date Fields; 4) Gender Fields; 5) Radio Buttons; and, 6) Check Boxes.

Under this section, you will learn how to add a field to a question. In addition, this section will describe each of the field types and the properties which must be defined for each type. A reference chart of the field properties and field types follows. And, finally, this section will show you how to browse for sample Question types that include a group of fields.



Note that a field type is not the same as a variable type, which defines how data, once collected, should be treated. So, for example, you may have a number field that provides a convenient format to collect a special number, such as the “number phone” field in A2J Author[®], which provides three convenient spaces to ensure the number is entered properly. However, a text type variable will be used in association with the number field in this case, because, a phone number, while it is a number, will nevertheless be treated as text in the corresponding HotDocs[®] template.

ADDING A
FIELD:

There are two ways in which a field can be added to a Question. Fields can be added one at a time by selecting the “+” (plus) button from the Fields list (Figure 97). Alternatively, a predefined Question Type can be used to add a selection of Fields or Buttons to a Question. This can only be done in the event the Question is new, for which no existing Fields are associated. To add a predefined Question Type which includes one or more fields, select the “Browse” button located in the center of the Fields Tab (Figure 97).



Figure 97: Select Add button or Browse button to add a field.

PROPERTIES
OVERVIEW:

There are a number of different properties for each field type. All field types, however, require that you define the type, label, and variable; and, most field types provide a validation selection. Other properties include: Default Value, Custom or External Lists, Order List, and Limit Value. Each of these property types are described below.

COMMON PROPERTIES

Each of these field types has a set of three common properties which need to be defined for each added field: Type, Label, and Variable (Figure 98). The field *type* must be selected from a drop-down list (Figure 99). A *label*, which will appear next to the field (usually to the left) in the Question, should be entered in the “Label” field, if desired (Figure 98). And, a *variable name* must be assigned to collect the data which will ultimately be entered by the end-user in the field during the interview (Figure 98). If variables from a HotDocs® component file were previously imported under the Variables Tab, then any of those variable names can be selected from the Variable drop-down menu under the Fields Tab.

Figure 98: Common properties to every field type.

Figure 99: Field Types

VALIDATION

Most fields provide the option to validate the field, meaning that you can set the field as “required.” In A2J Author® the required setting is entitled “User must fill in” (Figure

100). To assist the end-user, A2J Author[®] provides a “Prompt” field, so that you can set language that explains to the end-user why the field must be filled in (Figure 101). An audio file for the prompt can also be attached here (see the “Adding Audio” chapter). If “User must fill in” is selected as the “Validation” choice, the field label will be in red and the end-user will not be able to proceed without filling in information in the field (Figure 101).

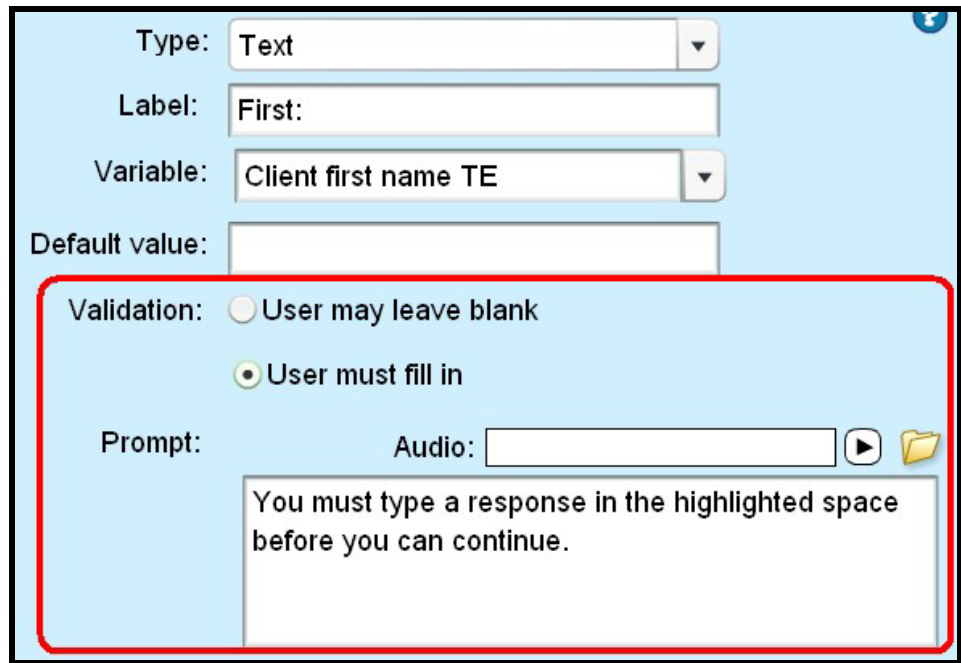


Figure 100: Validation settings and Prompt field.

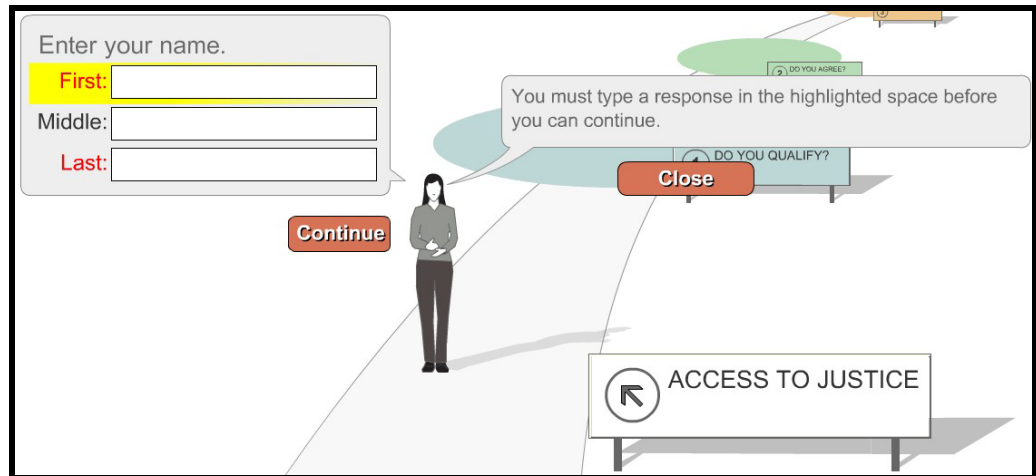


Figure 101: Validation, as it appears to the end-user.

DEFAULT VALUE

You can set a default value for most of the field types, except the Checkbox and Gender field (Figure 102). While, the default value will appear in the field as a suggestion to the end-user, the end-user can enter an alternate value (Figure 103). This feature works well for routine information, such as county or state. By providing a default value in appropriate places, you increase the efficiency of the interview for the end-user.

The screenshot shows a configuration panel for a field. The 'Type' is set to 'Text (Pick from list)'. The 'Label' is 'County:'. The 'Variable' is 'Client county TE'. The 'Default value' is 'Los Angeles'. The 'List' is set to 'Customized List' with a radio button selected. There is an 'Edit...' button and an option for 'List from external file' which is not selected.

Figure 102: Default Value set to “Los Angeles.”

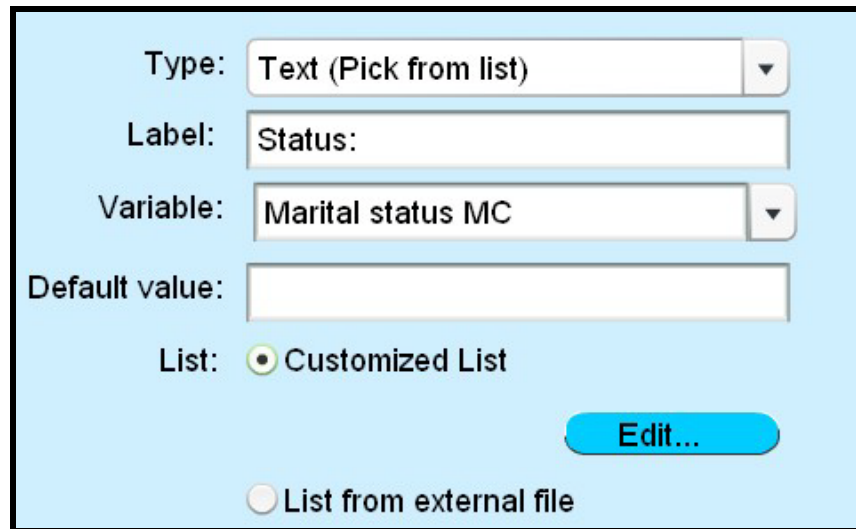
The screenshot shows a user interface with a form titled 'Please provide your address:'. The form has fields for 'Address 1:', 'Address 2:', 'City:', 'County:', 'State:', and 'Zip:'. The 'County:' dropdown is open, showing a list of counties: 'Los Angeles', 'Orange County', 'Riverside', 'San Bernardino', and 'San Diego'. 'Los Angeles' is highlighted in green, indicating it is the default value. A woman is standing next to the form.

Figure 103: Default Value populates the field.

CUSTOM OR EXTERNAL LISTS

There are three types of fields you can use to provide the end-user with a drop-down menu which includes a series of field values. However, it is only the Text(Pick from list) field which allows you to design a custom list, or attach an external list.

To create a custom list, you select the “Customized List” option (Figure 104). Then, after selecting the “Edit” button, you can enter your custom list of field values in the Edit box (Figure 105).



The image shows a configuration dialog box with a light blue background. It contains the following fields and options:

- Type:** A dropdown menu set to "Text (Pick from list)".
- Label:** A text input field containing "Status:".
- Variable:** A dropdown menu set to "Marital status MC".
- Default value:** An empty text input field.
- List:** Two radio button options: "Customized List" (which is selected) and "List from external file".
- Edit...:** A blue button located to the right of the "List" options.

Figure 104: Custom list option and Edit button.



The image shows a dialog box titled "Custom List Edit" with a white background and a blue header bar. The header bar contains a question mark icon and a close button (X). The main area of the dialog box is a list box containing the following text:

- Single
- Married
- Divorced
- Widowed

At the bottom of the dialog box, there are two blue buttons: "OK" and "Cancel".

Figure 105: Custom List Edit box.

Alternatively, you can attach a preformatted list from an external file. For example, the A2J Author[®] Starter-Kit provides a list of U.S. States that is preformatted to convert into the two character abbreviation for the state once it is imported into HotDocs[®]. The name of the file is US_States.xml.

To attach a preformatted list, you select the “List from external file” option. Then you must browse your computer files to find the appropriate preformatted list (Figure 106). Double-click on the name of the list to attach it to the field in A2J Author[®].

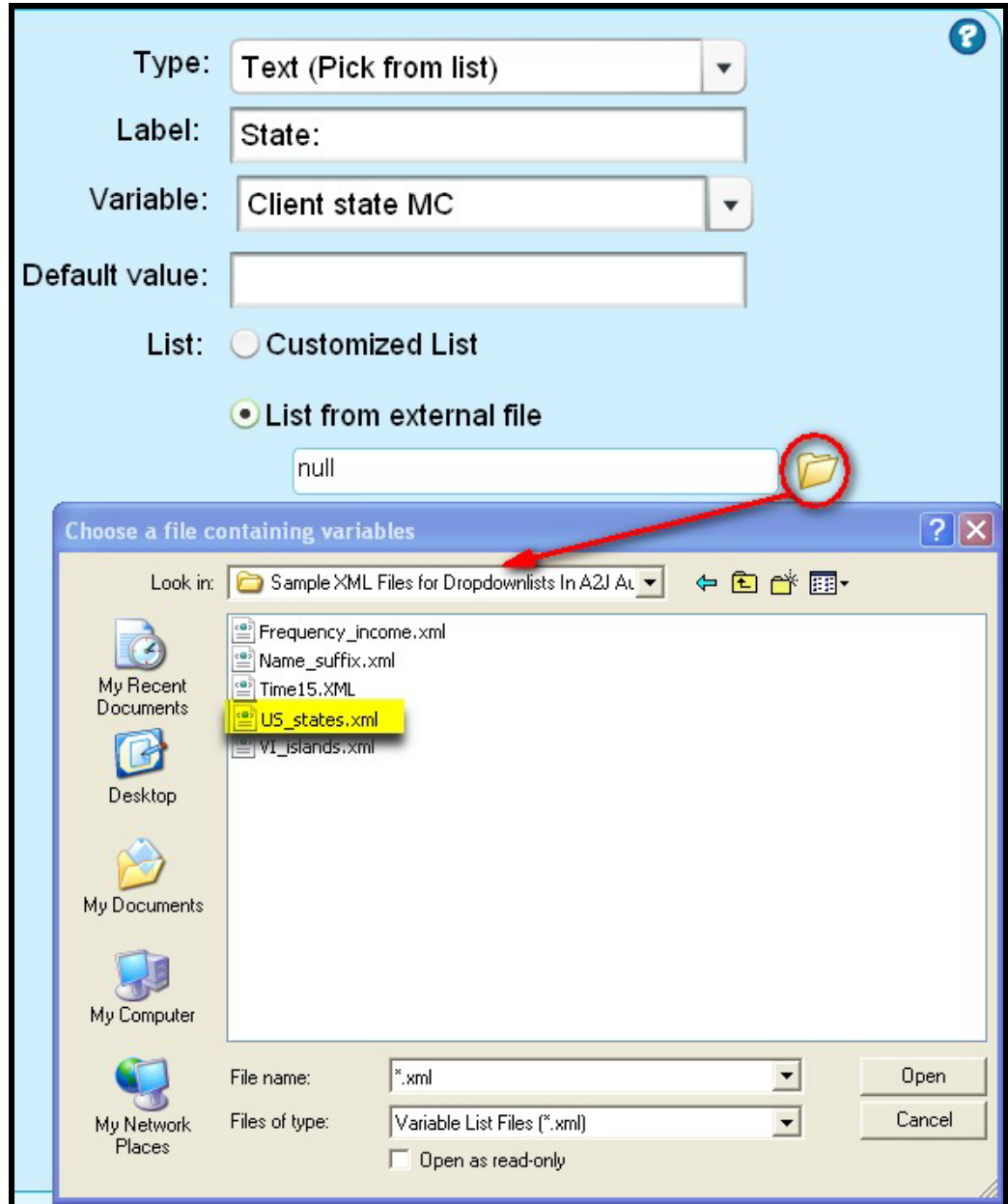


Figure 106: List from external file and US_States.xml preformatted list.

ORDER LIST

All of the fields with drop-down menus (Text(Pick from list), Number(Pick from list), and Date) have the option to be ordered in ascending or descending order (Figure 107). For an example of how either of these orders might appear to the end-user, see Figure 108 and Figure 109.

The Text(Pick from list) in addition has the option to be neither ascending or descending, thus enabling you to custom set the order of the options. For instance, you may wish to provide the options, *Single*, *Married*, *Divorced*, and *Widowed*, in that exact order, which has neither an ascending or descending order. To keep the list in the order just as it was entered in the list, select “None.”

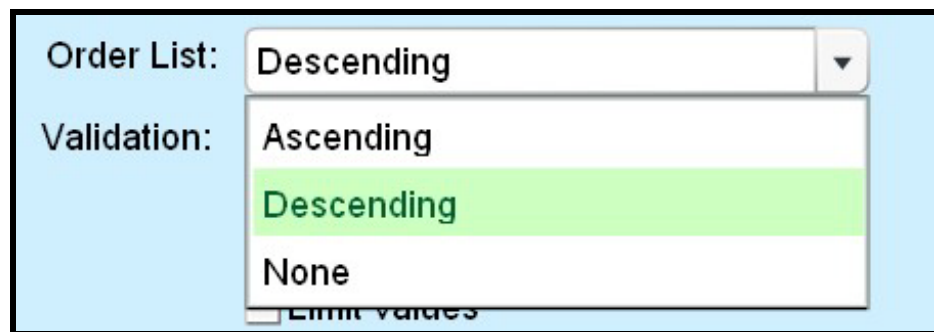


Figure 107: Order list option.

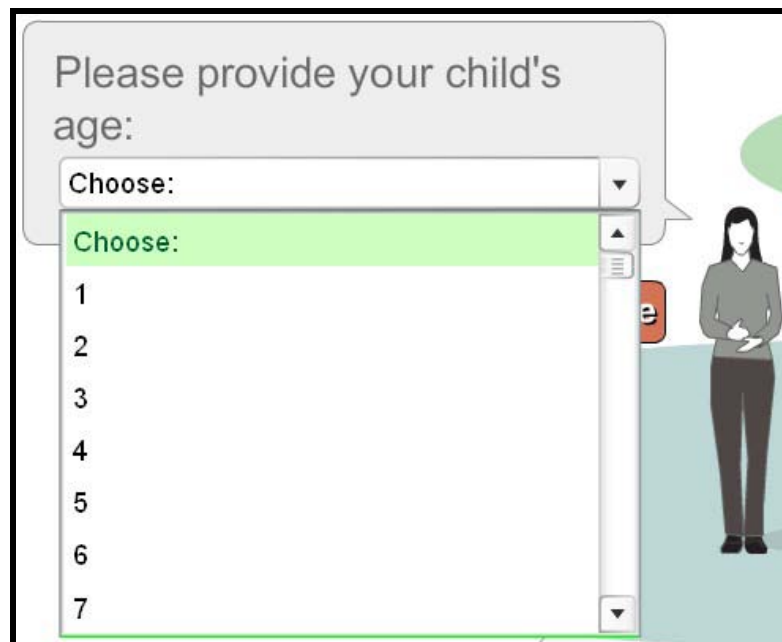


Figure 108: Ascending order.

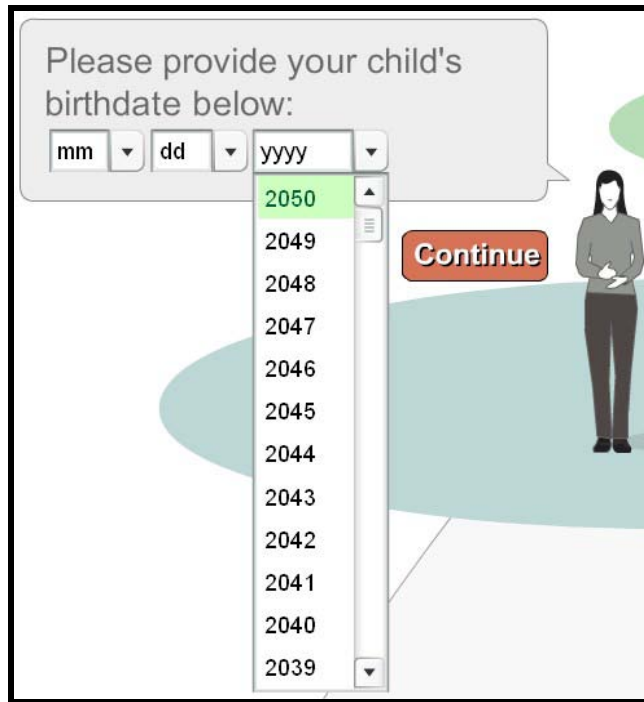


Figure 109: Descending order selected for a date list.

LIMIT VALUE

The ordering of number and date lists works best when limits are placed on the values that can appear in the list. For instance, when collecting a birth date, you may want to sort the date list in descending order beginning with the current year. Or, you may want sort beginning with “today’s date” when asking the end-user what date they will be mailing a letter. When collecting the number of children you may wish to sort the list in ascending order, but limiting it to a total of 10. These are just a few examples.

To limit a number list or date list to a particular range, select the “Limit values” option under the Field tab (Figure 110) and set a minimum value and maximum value. For dates, set the range using the format mm/dd/yyyy. You may also limit the range using the “TODAY” function (see subheading in this chapter entitled “Functions”).

 A screenshot of a configuration panel with a light blue background. At the top, there is a checked checkbox labeled "Limit values". Below this, there are two text input fields. The first is labeled "Min value:" and the second is labeled "Max value:".

Figure 110: Limit values option includes Min value and Max value.

TEXT FIELDS:

There are three different sub-types of text fields: Text, Text(Long), and Text(Pick from list). The first option pictured below, is a text field that allows the end-user to enter a single line of text. This type is simply referred to as “Text” in the drop-down Type selection list under the Fields Tab.

The second type is entitled “Text(Long),” which allows an end-user to type in multiple lines of text. Text(Long) also provides the end-user with the option to enlarge the text box so they can more easily view and edit large amounts of text.

The third text type is “Text(Pick from list),” which allows a end-user to select a text entry from a drop-down menu. Each is pictured below in Figure 111.

The screenshot shows a user interface for a question. At the top left is the logo 'a2j' and the text 'Access To Justice AT CHICAGO-KENT COLLEGE OF LAW'. The main content area is a light gray box with the heading 'Here are some examples of fields which collect text:'. Below this heading are three examples: 1) 'Employer Name:' followed by a single-line text input field. 2) 'What are your job duties?' followed by a large multi-line text input field with a vertical scrollbar and a button labeled 'Enlarge text box' with a plus icon. 3) 'County:' followed by a dropdown menu with the text 'Choose from this list:' and a downward arrow. To the right of the text boxes is a small illustration of a woman standing. At the bottom right of the interface is a red 'Continue' button.

Figure 111: Preview of Text-type Fields in a Question.

In addition to the common properties (Type, Label, and Variable), Text-type Fields provide for some additional definition. The variables associated with any of the Text-type fields can be assigned a default value. Also, each of the Text-type Fields has the option to be validated (Figure 112).

Type: Text

Label: First:

Variable: Client first name TE

Default value:

Validation: User may leave blank
 User must fill in

Prompt: Audio:

You must type a response in the highlighted space before you can continue.

Figure 112: Properties for the Text Type and Text(Long) Field

The Text(Pick from list) field provides the option of defining a custom list for the drop-down menu or attaching a pre-formatted .xml list, either of which can be sorted in ascending or descending order (Figure 113). You can also retain the order as given in the custom list by selecting “none” from the Order List option.

Type: Text (Pick from list)

Label: State:

Variable: Client state MC

Default value: Illinois

List: Customized List
 List from external file
 ial\Training Modules\US_states.xml

Order List: Ascending

Validation: User may leave blank
 User must fill in

Prompt: Audio:

You must make a selection from the highlighted space before you can continue.

Figure 113: Properties for the Text(Pick from list) Type Field



The Starter-Kit includes a selection of pre-formatted .xml lists that can be used in association with Text(Pick from list) fields. For a selection of pre-formatted lists visit the Community Website at www.a2jauthor.org and download the A2J Author® Starter-Kit.

**NUMBER
FIELDS:**

There are six different sub-types of number fields: Number, Number Dollar, Number SSN, Number Phone, Number Zip Code, and Number(Pick from list) (Figure 114). The purpose for each of these number fields is obvious from their title.

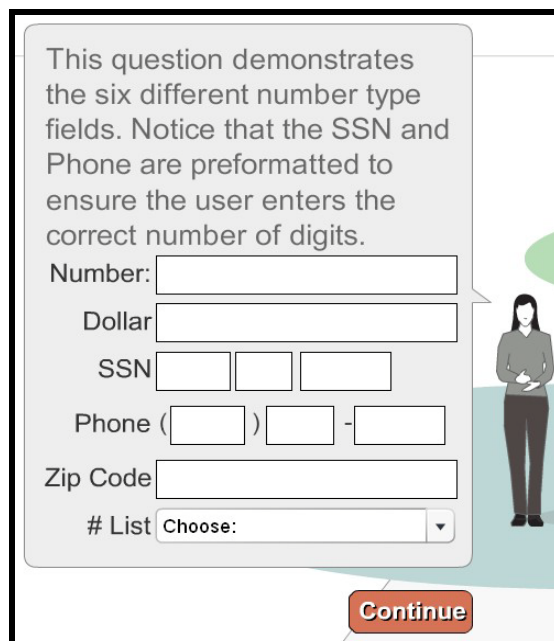


Figure 114: Number fields.

The properties of the various number field types are similar. The Number and Number Dollar fields allow the end-user to enter only a number. They can also be designed to limit the range of numbers that can be entered, using the Limit Values property (Figure 115). Each of these field types – Number and Number Dollar – will default the associated variable name to a number variable type.

Figure 115: Number Dollar field. Same properties apply to Number.

Number and Number Dollar fields also give the author the option to include a graphical calculator for the end user (Figure 115). When selected, the end-user will see a small calculator graphic next to the answer field which pops up a larger functioning calculator (Figure 116). The end user may perform any calculations and hit “Enter” to populate the answer field.

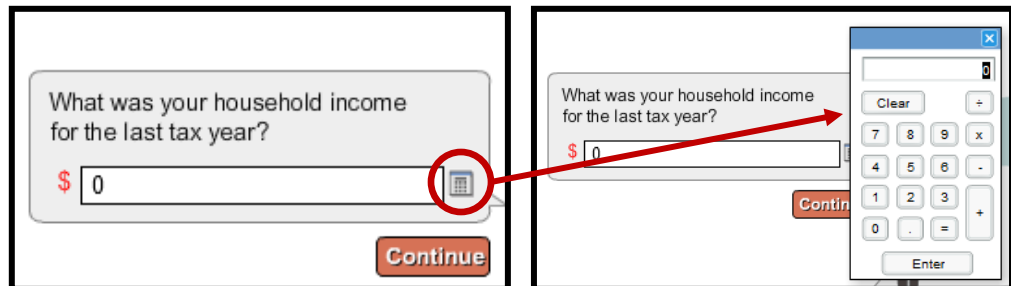


Figure 116: Graphic Calculator.

The Number SSN, Number Phone, and Number Zip Code field types (Figure 117) work differently – they cannot be limited to a range of numbers. In addition, Number SSN and Number Phone field types will only accept numbers. However any variable associated with either of these fields is defaulted to a text variable type. The Number Zip Code will accept both numbers and letters.

Type:

 Label:

 Variable:

 Default value:

 Validation: User may leave blank

 User must fill in

Figure 117: Properties for Number SSN, Number Phone, and Number Zip Code.

The Number(Pick from list) field works similar to the Text(Pick from list) in that it provides the ability to limit the list to a range and sort it in ascending or descending order (Figure 118). This field will default the variable to a number variable type.

Type:

 Label:

 Variable:

 Default value:

 Order List:

 Validation: User may leave blank

 User must fill in

 Limit values

 Min value:

 Max value:

 Prompt: Audio:

You must select a number from the highlighted space before you can continue.

Figure 118: Number (Pick from list) field properties.

DATE FIELDS:

The Date field collects a date from the end-user using drop down lists for the month, day, and year, or the optional graphic calendar. The field, when represented to the end-user, is formatted into a separate drop-down menu for the month, day, and year (Figure 119).

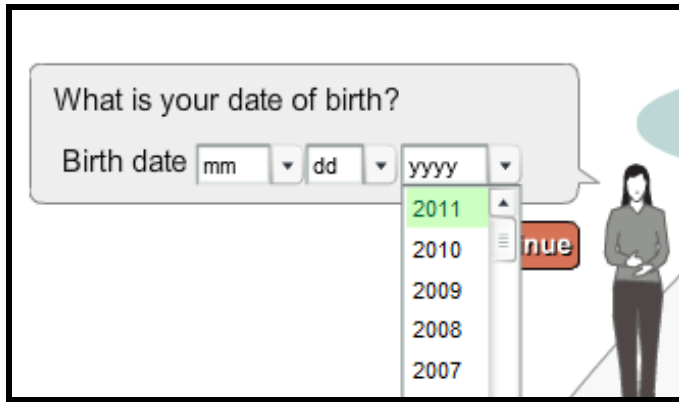


Figure 119: Date field.

Along with the three common properties (Type, Label, and Variable), the date field properties include: Default Value, Order List, Validation, Limit Values and Show Calendar (). The Limit Values, if they are to be used, must both be populated with either a date in the “mm/dd/yyyy” format or the function “TODAY.”

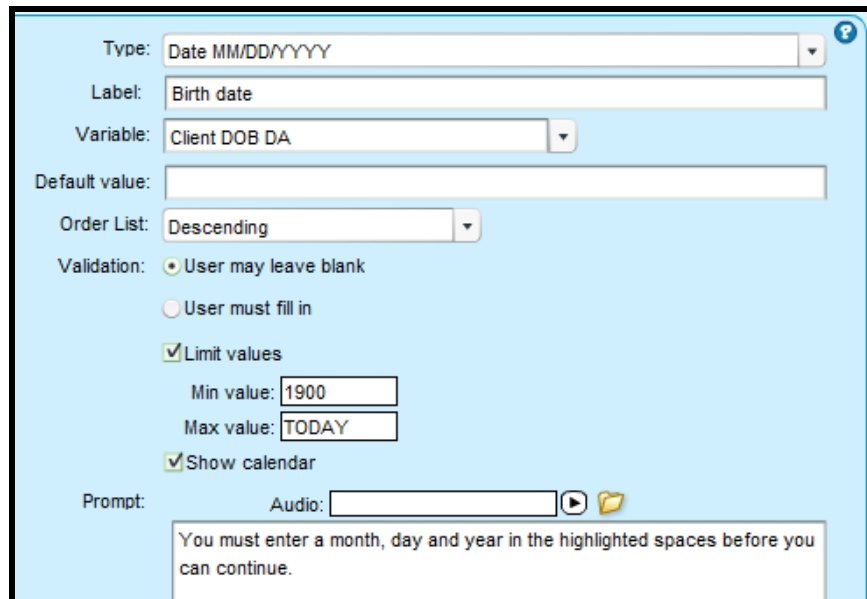


Figure 120: Birth date field.

If the author chooses to include the optional graphic calendar for end-users, a small calendar graphic appears next to the drop down menu answer field which pops up a larger functioning calendar (Figure 121). The calendar defaults to the current year, month and date, unless the “Max value” under “Limit values” is set to something less than the current year.



Figure 121: Graphic Calendar.

RADIO
BUTTONS:

There are two different types of radio button fields: Gender and Radio Button. The gender field is the simpler of the two and is used only to collect a gender from the end-user. The value that is placed in the supplied variable is either ‘Male’ or ‘Female’ based upon the end-user’s input (Figure 122).



Figure 122: Gender radio buttons.

The properties for the Gender radio buttons are already pre-defined (Figure 123). While there is a validation choice, it is defaulted to “User must fill in” and should remain that way, so that the User’s Avatar will populate the interview.

The screenshot shows a configuration window for a 'Gender' field. It includes a 'Type' dropdown set to 'Gender', a 'Label' text box containing 'Gender:', and a 'Variable' dropdown set to 'User Gender'. Under the 'Validation' section, the 'User must fill in' option is selected. The 'Prompt' area contains a text box with the message: 'You must choose either male or female from the highlighted selection before you can continue.' To the right of the prompt is an 'Audio' section with a play button and a folder icon.

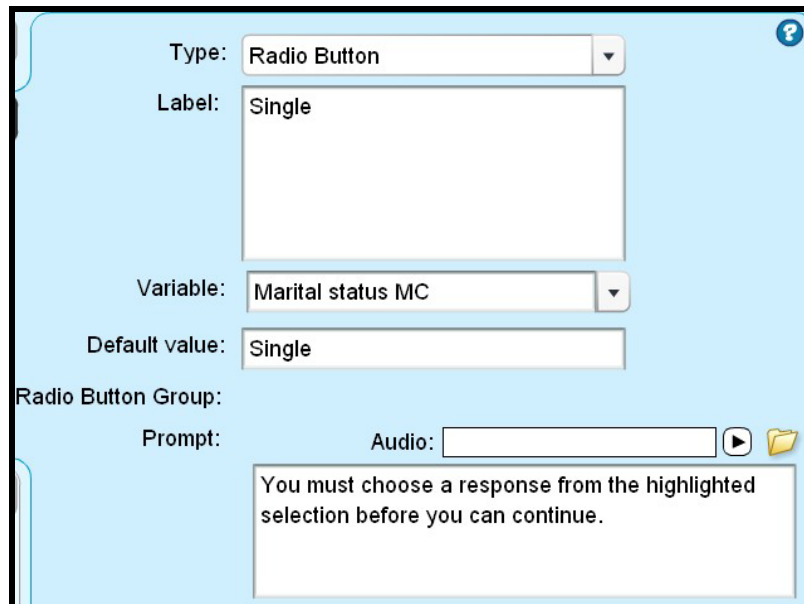
Figure 123: Gender field properties

The other type is the generic radio button. Radio buttons are used when you want to provide a selection of choices for the end-user, but need to guarantee that they only select one option, such as in selecting marital status (Figure 124).

The screenshot shows a question interface with a light gray background. The text reads: 'Please select your marital status below:'. Below this text are four radio button options: 'Single', 'Married', 'Divorced', and 'Widowed'. At the bottom right of the interface is a red 'Continue' button.

Figure 124: Radio button example.

The radio button defaults an associated variable to a multiple choice variable type. Therefore, if you provide a series of radio buttons in a question, only one button can be selected. In addition, all of the radio buttons must have the exact same variable with a separate default value for each (Figure 125).



Type: Radio Button

Label: Single

Variable: Marital status MC

Default value: Single

Radio Button Group:

Prompt: Audio:

You must choose a response from the highlighted selection before you can continue.

Figure 125: Radio button properties.

CHECKBOXES:

Checkboxes are used to provide the end-user with the option of selecting multiple values (Figure 126). The Checkbox field, however, is associated with a true/false variable type, not multiple choice. Thus, a checked box has a value of ‘true’ and an unchecked box has a value of ‘false’.



Please select all that apply:

- Public Aid
- Help for families
- Food stamps
- TANF
- SSI
- None of the above

Continue

Figure 126: Checkbox and Checkbox(None of the above) fields.

You can require the end-user to select at least one value using “user must fill in” or by adding a Checkbox(None of the above) field to the group (Figure 126). A “None of the above” option lets the end-user know they can pass if none of the options apply (Figure 127). Using “none of the above” also allows you to branch the end-user to an alternative question, perhaps to collect a custom answer from the end-user.

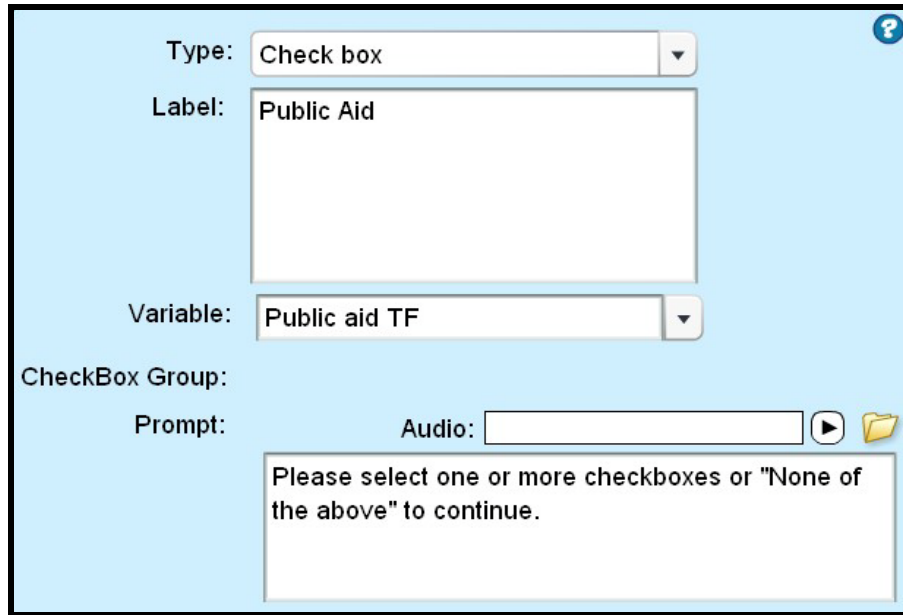


Figure 127: Checkbox properties (if a “none of the above” checkbox is included in the group).

Field Properties Reference Chart

FIELD PROPERTIES	DESCRIPTION
Type	There are 14 field types available: Text, Text (Long), Text (Pick from list), Number, Number Dollar, Number SSN, Number Phone, Number Zip Code, Number (Pick from list), Date, Gender, Radio Button, Checkbox, Checkbox (None of the above). A Field Type must be selected for every added field.
Label	<p>A label which identifies the type of data being collected in the field can be added, if desired. For most Field Types the label will appear to the left of the field. If a label is too long, the field will drop below the label to allow the label to include additional characters, but can be no longer than the width of the question bubble.</p> <p>In the case of the Gender, Radio Button, and Checkbox fields, the label will appear to the right of the radio button or checkboxes. Labels for these types of fields will wrap, allowing for more than one line of text.</p>
Variable	A variable name must be assigned to every added field. (For more on variable naming conventions, see Appendix C.) When a Field Type is selected, A2J Author [®] will assign a default variable type for the associated variable name. To change the variable type, the variable should be referenced under the Variables Tab.

FIELD PROPERTIES	DESCRIPTION
Default Value	Most field types allow the author to provide a default value for the variable associated with a field. Providing a default value can add efficiency to an interview (e.g., if it is likely that most end-users will enter “Cook” county, even though the interview could apply to all of the counties in Illinois, the author of the interview could default a text list to show Cook County first.)
Validation	All Field Types can be equipped with a validation feature which demands that the end-user complete an entry in the field before moving further in the interview. The validation selection options are “user may leave blank” and “user must fill in.” If the latter option is selected, A2J Author [®] will return a prompt, the text of which can be modified by the author.
Custom/ External List	The Text (Pick from list) Field Type includes the ability to provide a custom drop-down list or attach a pre-formatted (.xml) list. A US States (.xml) list which includes the State name and corresponding State abbreviation is included in the A2J Author [®] Starter Kit.
Order List	The Text(Pick from list), Number(Pick from list), and Date Field Types can each have their drop-down lists sorted in ascending or descending order. Alternatively, the author can choose to have no sort order to a list, by selecting the “none” option from “Order List.” By selecting “none”, an author can keep a custom text list in the order in which it was defined in the Custom List.
Limit Value	Number, Number Dollar, Number(Pick from list), and Date Field Types can have their selections limited by selecting the “Limit Value” property under the Fields Tab. For Number, Number Dollar and Number(Pick from list) a minimum and maximum number can be chosen to limit the range of numbers that can be entered in the field. For the Date Field, a minimum and maximum date can be chosen to limit the range of dates that can be selected. The “TODAY” function can also be used to limit the date selection. See the subheading Functions in this chapter for more details.

Field Types Reference Chart

<i>FIELD TYPES</i>	FIELD PROPERTIES							
	Type	Label	Variable	Default Value	Validation	Custom/ External List	Order List	Limit Value

CREATING QUESTIONS

<i>FIELD TYPES</i>	FIELD PROPERTIES							
	Type	Label	Variable	Default Value	Validation	Custom/ External List	Order List	Limit Value
Text	✓	✓	✓	✓	✓			
	<i>Features:</i> The field will move to the second line as the label for the field gets larger. A label for this field is limited to one line of text. Any variable associated with this Field type is defaulted to a Text variable.							
Text (Long)	✓	✓	✓	✓	✓			
	<i>Features:</i> The field will move to the second line as the label for the field gets larger. A label for this field is limited to one line of text. The end-user can enlarge the text box. Any variable associated with this Field type is defaulted to a Text variable.							
Text (Pick from list)	✓	✓	✓	✓	✓	✓	✓	
	<i>Features:</i> The field will move to the second line as the label for the field gets larger. A label for this field is limited to one line of text. Any variable associated with this Field type is defaulted to a Multiple Choice variable.							
Number	✓	✓	✓	✓	✓			✓
	<i>Features:</i> The field will move to the second line as the label for the field gets larger. A label for this field is limited to one line of text. This field will automatically reject an entry of text. Any variable associated with this Field type is defaulted to a Number variable.							
Number Dollar	✓	✓	✓	✓	✓			✓
	<i>Features:</i> The field will move to the second line as the label for the field gets larger. A label for this field is limited to one line of text. This field will automatically reject an entry of text. Any variable associated with this Field type is defaulted to a Number variable.							
Number SSN	✓	✓	✓	✓	✓			
	<i>Features:</i> The field will move to the second line as the label for the field gets larger. A label for this field is limited to one line of text. This field will automatically reject an entry of text. Any variable associated with this Field type is defaulted to a Text variable.							

<i>FIELD TYPES</i>	FIELD PROPERTIES							
	Type	Label	Variable	Default Value	Validation	Custom/ External List	Order List	Limit Value
Number Phone	✓	✓	✓	✓	✓			
	<i>Features:</i> The field will move to the second line as the label for the field gets larger. A label for this field is limited to one line of text. This field will automatically reject an entry of text. Any variable associated with this Field type is defaulted to a Text variable.							
Number Zip Code	✓	✓	✓	✓	✓			
	<i>Features:</i> The field will move to the second line as the label for the field gets larger. A label for this field is limited to one line of text. This field accepts text and numerals. Any variable associated with this Field type is defaulted to a Text variable.							
Number (Pick from list)	✓	✓	✓	✓	✓		✓	✓
	<i>Features:</i> The field will move to the second line as the label for the field gets larger. A label for this field is limited to one line of text. Any variable associated with this Field type is defaulted to a Number variable.							
Date	✓	✓	✓	✓	✓		✓	✓
	<i>Features:</i> Only numbers can be entered into this field type. The field provides three separate drop-down menus from which to select, month, day, and year. The range can be limited using the function “TODAY” as either the minimum or maximum value. The field will move to the second line as the label for the field gets larger. Any variable associated with this Field type is defaulted to a Date variable.							
Gender	✓	✓	✓		✓			
	<i>Features:</i> The Gender field is pre-formatted as a set of two radio buttons: one with the label of female, and the other male. A label for the group of buttons entitled “Gender” is included. It should retain the variable “User Gender” in order to set the gender of the User’s avatar. Any variable associated with this Field type is defaulted to a Text-type variable.							
Radio Button	✓	✓	✓	✓	✓			
	<i>Features:</i> Any variable associated with this Field type is defaulted to a Multiple Choice variable. Only one selection from a group is allowed. The label for this field appears to the right and will wrap.							

<i>FIELD TYPES</i>	FIELD PROPERTIES							
	Type	Label	Variable	Default Value	Validation	Custom/ External List	Order List	Limit Value
Checkbox	✓	✓	✓		✓			
<i>Features:</i> Any variable associated with this Field type is defaulted to a True/False variable. The label from this field appears to the right of the checkbox and will wrap.								
Checkbox (none of the above)	✓	✓	✓		✓			
<i>Features:</i> The variable associated with this Field type is defaulted to a True/False variable.								

PRE-DEFINED QUESTION TYPES:

The Fields Tab also allows you to select a predefined Question type that includes predefined fields. These templates are meant as examples and can be modified to the needs of the interview. After adding a template it is possible to delete any of the fields created by the template and also to add more fields or buttons. The following templates are available:

Continue button	Yes/No buttons
2 Buttons	3 Buttons
3 Options	2 Check boxes
Short answer	Long answer
Gender	Asset list
Full name	Address
Pick text from a list	Pick number from a list
SSN	Phone
Date	

To add one of these Question templates, select the “Browse” (Figure 128).

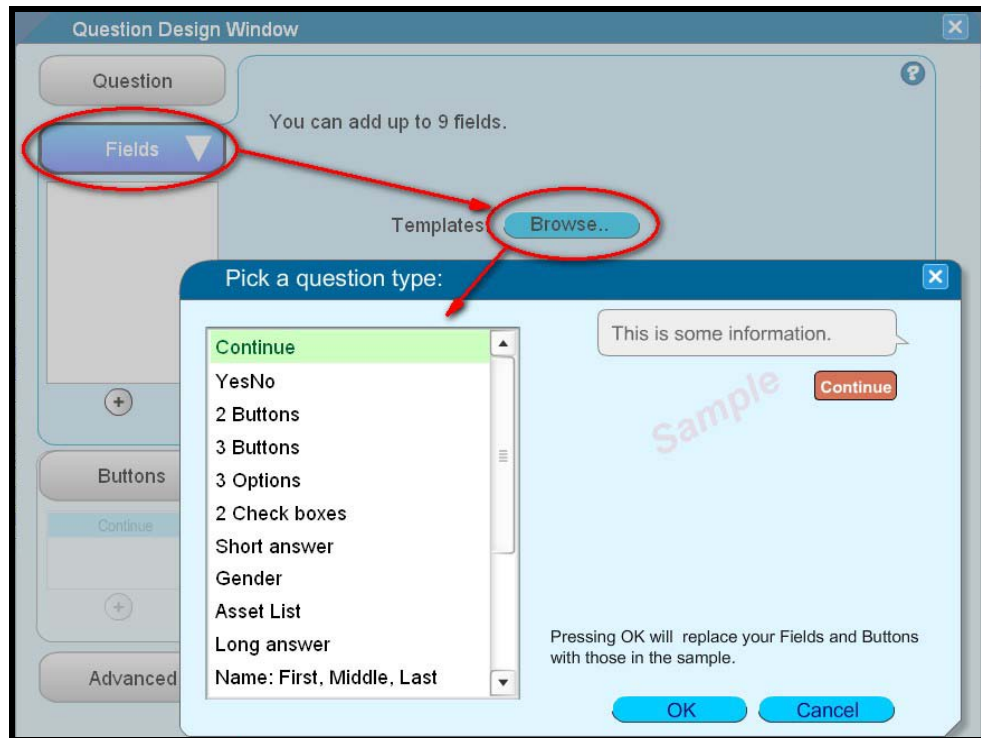


Figure 128: Pick a question type menu delivered from “Browse” button under the Fields Tab.

Buttons Tab

The third tab in the Question Design Window is the Button Tab. Under the Button Tab you can add up to three (3) buttons to a question, give the button a label, associate variables with a button, set the destination of each question, and manage the counting variable for a repeat dialog.

ADDING & LABELING BUTTONS:

By default, there will always be a Continue button in a question (Figure 129). Of course, you must always have at least one button, because it is through the click of a button that the end-user advances through the interview. However, it is possible to have up to three (3) buttons (Figure 130). The button labels are dynamically sized as you add each button. To add buttons select the “+” (plus) button under the Buttons Tab (Figure 129). The name of each button is then typed in the “Label” field.

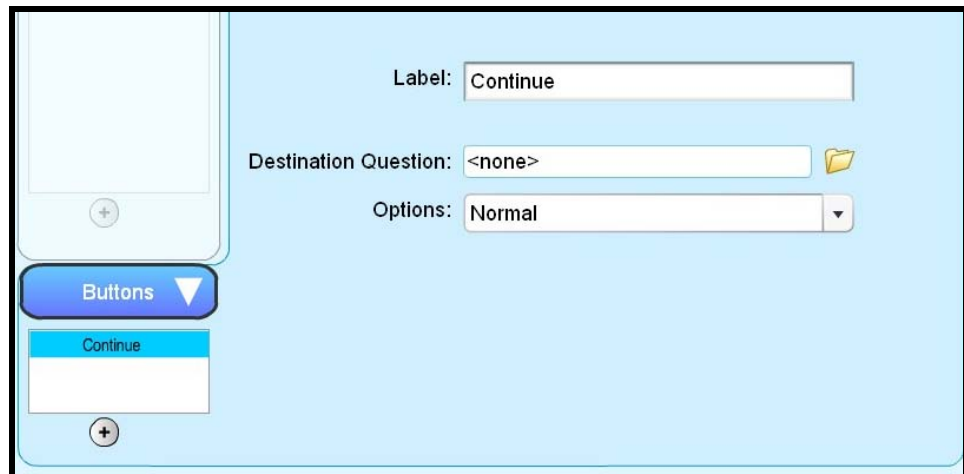


Figure 129: Default “Continue” Button.

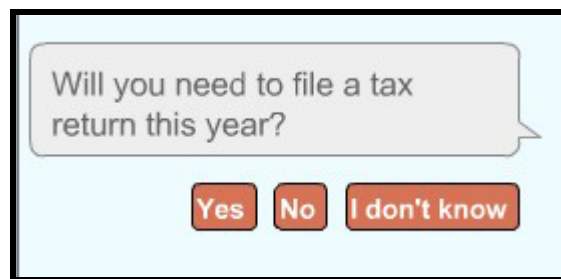


Figure 130: Example of three buttons.

**ASSOCIATING
VARIABLES:**

If more than one button is used in a question, then a variable can be associated with the button, such that if the button is selected the variable will be set to a certain value. Once you add a second button, a Variable and Value field will be added to the Button Tab, so that you can associate a variable (Figure 131).

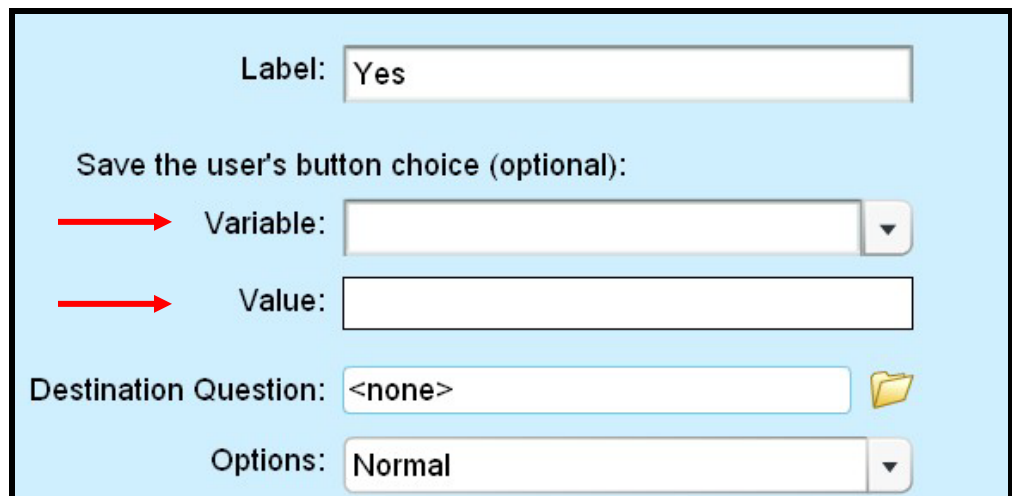


Figure 131: Button properties.

SETTING A
QUESTION'S
DESTINATION:

Each button has a question destination field that allows you to direct the end-user to the appropriate question following the completion of that question. The default destination for a button is [no where] (Figure 131). If the destination question is [no where], then the yellow circle icon is shown in the Flowchart (Figure 132).

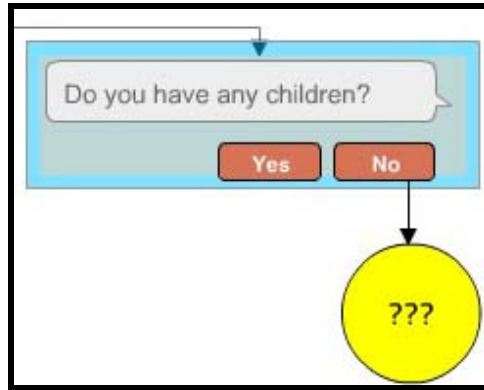


Figure 132: A question with no destination set.

To select a destination for a particular button “click,” select the yellow folder icon to browse your question set. From the question set, select the desired destination question and click “Change” (Figure 133). There are six alternative destinations to a question. One was already mentioned above: [no where]. The other five are: [Back to prior question], [Success – Process Form], [Exit – User does not qualify], [Exit - Save Incomplete Form], and [Exit – Resume Interview] (Figure 133).

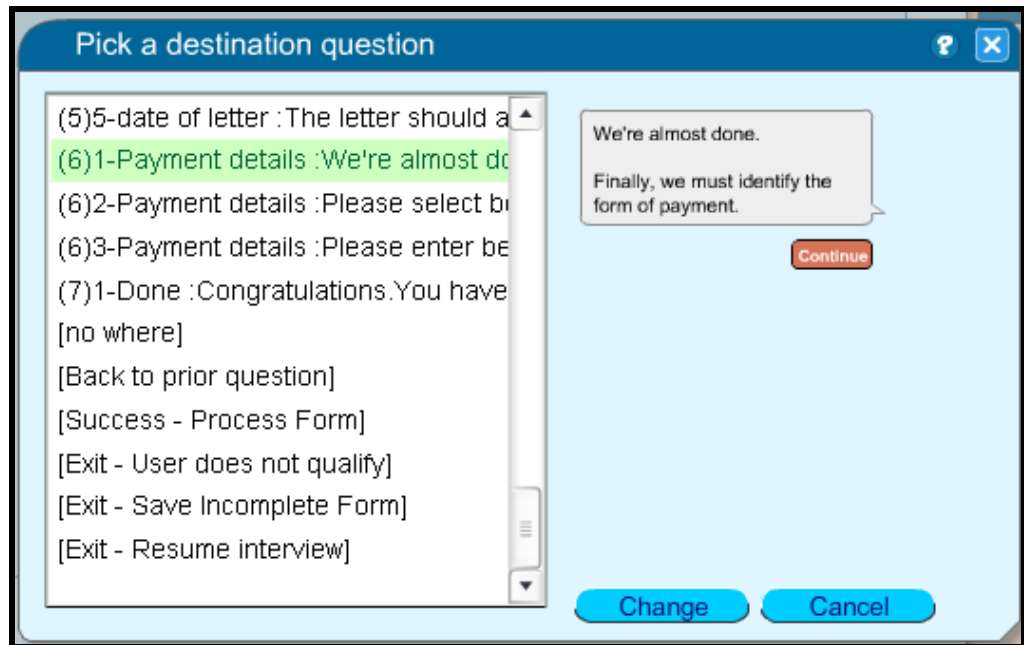


Figure 133: Pick a destination question.

BACK TO PRIOR QUESTION

The Back to Prior Question destination allows you to send the end-user to the next previous question they visited regardless of how they arrived at the present question. Thus, the Back to Prior Question works identical to the “Back” button that appears in the navigation menu for the end-user. Authors now have an option to include this feature as a button operation.

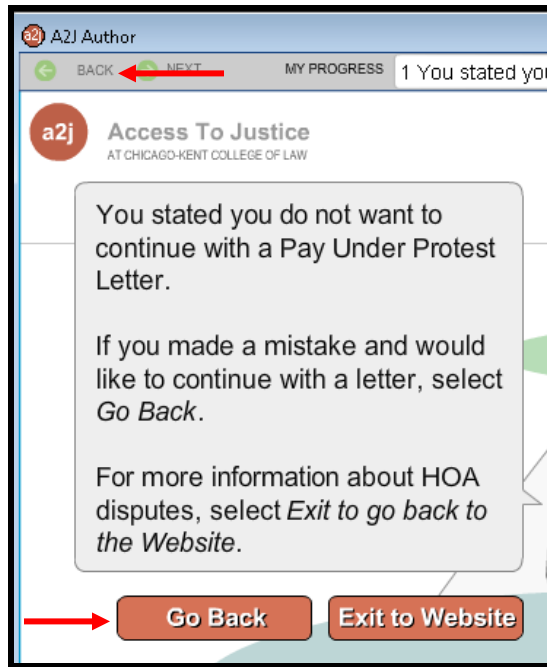


Figure 134: Back to Prior Question used in a button labeled "Go Back."

SUCCESS- PROCESS FORM

The Success-Process Form destination sends the interview data to the LHI server. However, the .ini file found in the program file folder for A2J Author® can be modified to send data elsewhere. Notice in Figure 135 that InterviewUploaderURL is set to http://upload.lawhelpinteractive.org/a2j_upload.aspx, which is the current setting to submit data to the LHI server.

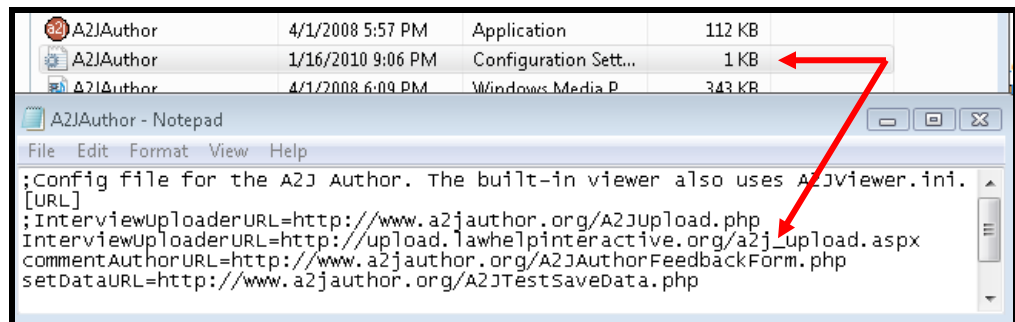


Figure 135: INI File containing configuration settings for the [Success-Process Form] option.

[EXIT- USER DOES NOT QUALIFY]

The Exit-User Does Not Qualify destination allows you to exit the end-user from the interview entirely. It also provides a URL field, so that you can send them to a particular place on the web, perhaps your organization's website (Figure 136).



Destination Question: [Exit - User does not qualify] 

URL: www.a2jauthor.org

Figure 136: Exit Destination.

[EXIT- SAVE INCOMPLETE FORM & EXIT - RESUME INTERVIEW]

The Exit-Save Incomplete Form and Exit-Resume Interview are both used in conjunction with setting up the Exit button in the navigation bar (Figure 137). To set up an Exit Question, first design the appropriate language in a Question. Then designate that Question as the Exit, by identifying it in the Exit field under the Question Tab (Figure 138).



Figure 137: Exit Question and Navigation Bar Exit Button

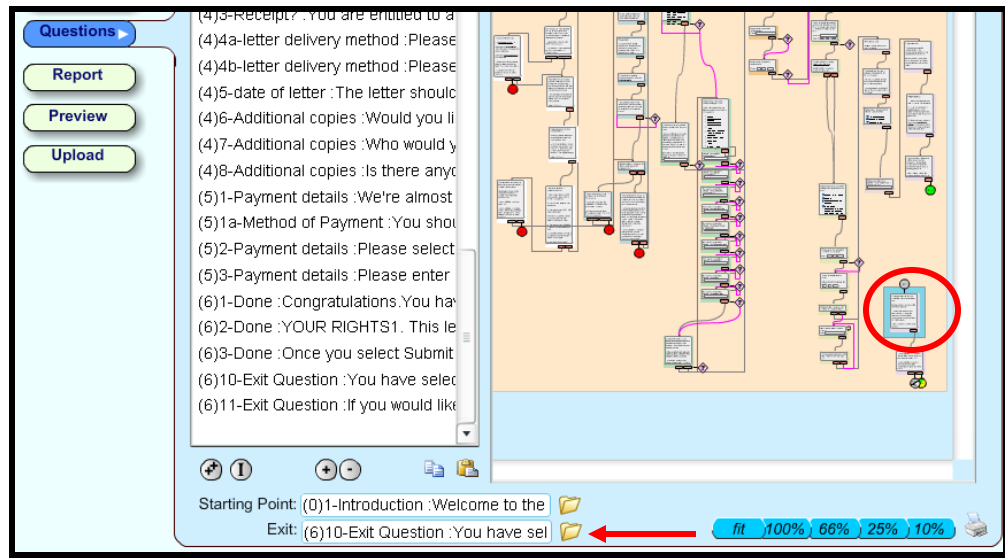


Figure 138: Exit field under the Question Tab.

Setting a Question under the Exit Field defines what Question will appear when the end-user selects the Exit Button from the main navigation menu. More than one Question can be a part of the Exit Question series. The final Question in the Exit Question series should then include the following two button options: [Exit – Save Incomplete Form] and [Exit-Resume Interview].

Exit-Save Incomplete Form will submit the data to the LHI server (or other designated server as described above for the Success-Process Form option). The Exit-Resume Interview button option will return the end-user to the exact Question the end-user visited just prior to selecting the Exit Button from the main navigation menu.

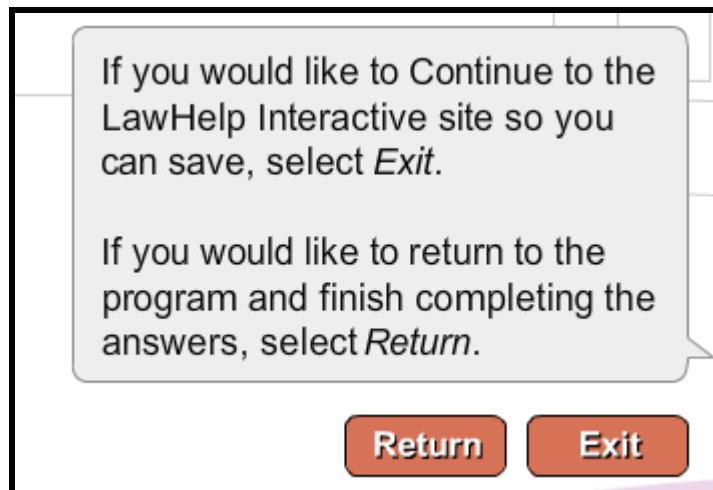


Figure 139: Question showing use of both the Exit-Save Incomplete Form and Exit-Resume Interview button options.

COUNTING
VARIABLE
FOR REPEAT
DIALOG:

The Button Tab is where you manage the variable that will “count” the number of times a repeat dialog is repeated. Under the Button Tab a Counting Variable is “set” to 1 at the beginning of a repeat dialog and “incremented” at the end of a repeat dialog (Figure 140). For complete instructions on how to construct a repeat dialog, see the subheading in this chapter entitled “Creating Repeat Dialogs.”

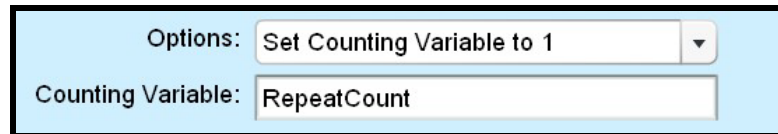


Figure 140: Option field to manage the counting variable for repeat dialogs.

Advanced Tab

A2J Author[®] allows you to branch or set variables based on simple logic conditions under the Advanced Tab in the Question Design Window (Figure 141). To add a new condition, press the “+” (plus) button (Figure 141). The Event, Condition, and Actions properties will then be displayed (Figure 142).

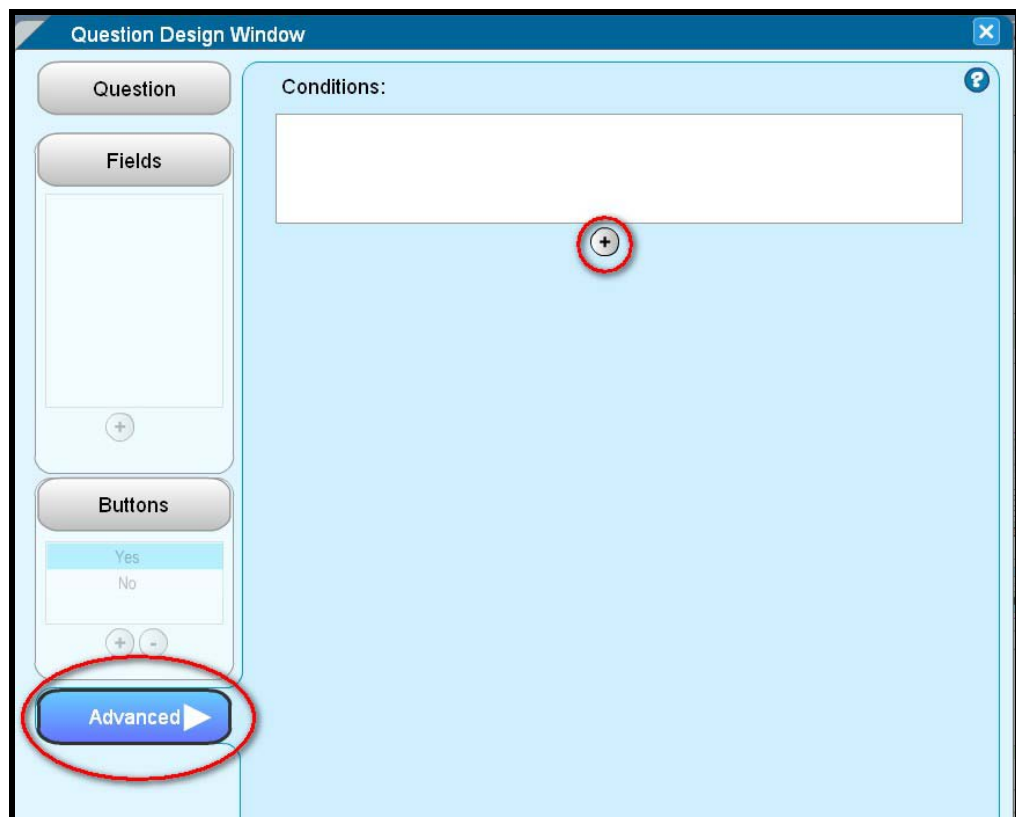


Figure 141: Advanced Tab and “+” button.

Figure 142: Event, Condition, and Actions fields for a Condition.

EVENT:

Each condition can either be tested before the question is displayed or after the end-user presses a button in the question (Figure 143). If a condition is tested before a question is displayed and the condition is true and the action is to move to another question, then the end-user will not see the current question. If the same condition is false, then the opposite is true.

Figure 143: Events: Before and After.

CONDITION:

The Condition field is where you will enter an expression that can be evaluated as true or false. For example, suppose a question asks for annual income. Let's assume that if the end-user had entered a number greater than \$25,000 that you would want them to answer a different set of questions. To reroute the end-user, you would write a condition similar to the following: `[Income NU]>25000` (Figure 144). A2J Author[®] would evaluate whether or not the income equaled an amount over 25,000. Based on whether that evaluation equals true or false, you can then tell the program to send the end-user to a particular question (see subheading entitled Action below).

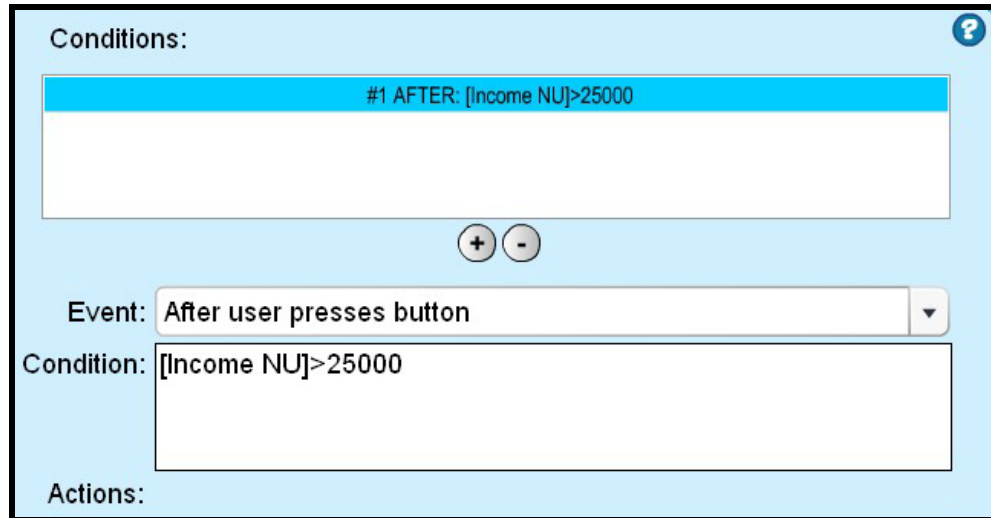


Figure 144: An equation or evaluation is set in the condition field.

Variables can be evaluated in a condition using the following operators:

Symbol	Comparison	Example	Result
=	equals	10 = 10	True
<>	not equal	10 <> 10	False
>	greater than	10 > 5	True
<	less than	10 < 5	False
>=	greater than or equal to	10 >= 10	True
<=	less than or equal to	10 <= 10	True
is	synonym for equals	City is "Chicago"	true if the City variable contains Chicago



Remember to always enclose variable names that include spaces in brackets [] when evaluating them in a condition.

Do This: [Children TF]=true

Do NOT Do This: Children TF=true

You can also do simple mathematical expressions.

Expression	Result
(15 - 15) > 10	false

A2J Author[®] also allows the use of AND and OR logic in your expressions. (These operators can be scripted in either lowercase or uppercase letters.)

Expression	Result
5 > 1 and 1 = 1	false
5 > 1 or 1 = 1	true

ACTION:

There are two possible actions following the evaluation of a condition: Set variable to value and Go to question (Figure 145). Set variable to value allows any variable to be set to a particular value or expression. Go to question allows you to reroute (or branch) the end-user to a different question than had the condition evaluated differently.



Conditions are tested in order! Once the first true condition is found whose action is to move to another question, the rest of the conditions will not be tested. Thus, you need to make sure that all of the conditions that set variables to values are listed above the conditions that use a “go to question” action. (You can write up to 50 conditions for any question.)

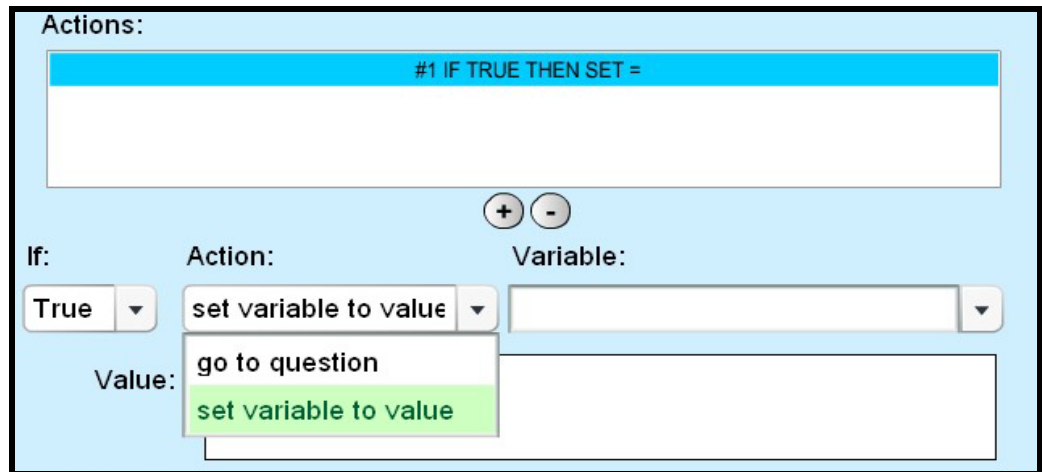


Figure 145: Actions: Go to question and Set variable to value.

In addition, A2J Author[®] allows you use a single evaluation to set more than one variable. To set an additional variable or send the end-user to a question based on the same condition, select the “+” (plus) button beneath the Actions field to add another action (Figure 146).

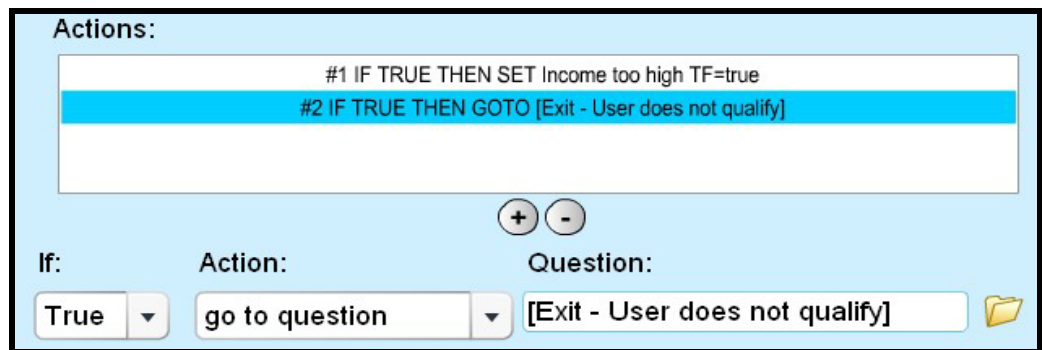


Figure 146: Add a second action for the same condition.

You can also avoid designing an entirely new condition to account for an opposite evaluation. For instance, now that you have evaluated whether [Income NU] is greater than \$25,000, you may want to set a separate action if [Income NU] is not greater than

\$25,000. To do this, you do not need to construct another evaluation, e.g., [Income NU] <25000. Instead, change your “if” statement to “false,” so that if [Income NU]>25000 is not true, you can set a variable or go to a question (Figure 147).

So, in the example below, a single condition has set three actions as follows: 1) if [Income NU]>25000 is true, then set the variable Income too high TF to true; 2) if [Income NU]>25000 is true, then go to question <Exit>; and 3) if [Income NU]>25000 is false, then set the variable Income too high TF to false. You could then add a fourth action, to send the end-user to a different question if [Income NU]>25000 is false.

The screenshot shows a question editor interface with the following sections:

- Conditions:** A text box containing the condition: "#1 AFTER: [Income NU]>25000 IF TRUE THEN SET Income too high TF=true, IF TRUE THEN GOTO [E".
- Event:** A dropdown menu set to "After user presses button".
- Condition:** A text box containing "[Income NU]>25000".
- Actions:** A list of three actions:
 - #1 IF TRUE THEN SET Income too high TF=true
 - #2 IF TRUE THEN GOTO [Exit - User does not qualify]
 - #3 IF FALSE THEN SET Income too high TF=false (highlighted in blue)
- If:** A dropdown menu set to "False", circled in red.
- Action:** A dropdown menu set to "set variable to value".
- Variable:** A dropdown menu set to "Income too high TF".
- Value:** A text box containing "false".
- Notes:** An empty text box.

Figure 147: A single condition setting three actions.

CREATING QUESTIONS

Functions

A2J Author[®] has a number of built in functions which can be used in evaluations under the advanced tab. Some can also be used to return a value in the text of a question.

Name	Parameter	Purpose	Sample	Result
AGE	any date	Converts date to age in year	AGE([User Birthday])	20 if User Birthday is 1/1/1980 and the current date is 1/1/2000
DATE	date or days	Converts days into a mm/dd/yyyy date	DATE(TODAY+90)	the date 90 days from today
DOLLAR	number	Formats a number with commas and period	DOLLAR(38581.3)	38,581.30
HASANSWERED	a variable	Returns true if the variable has a value	HASANSWERED([middle name])	true if client typed in a middle name, false otherwise.
HISHER	gender	Returns his or her depending on gender	HISHER(User Gender)	"her" if User Gender is Female
HESHE	gender	Returns he or she depending on gender	HESHE(User Gender)	"he" if User Gender is Male
ORDINAL	number	Returns ordinal form of number	ORDINAL(5)	5 th
ROUND	Number	Round a number to an integer	ROUND(5.21)	5
ROUND2	Number	Rounds a number to 2 places after decimal.	ROUND2(5.215)	5.22
SUM	repeating variable	Returns total of all the repeating variables	SUM([Asset Value])	If you asked for 3 asset values which are stored in a repeating variable, this would return the sum of these 3 values
TODAY	None	Returns today's date	TODAY	Today's date as a Date variable
TRUNC	number	Truncates a number to an integer	TRUNC(7.98)	7
TRUNC2	Number	Truncates a number at hundredth place.	TRUNC(7.479)	7.47



There is a tutorial for each of the above functions located on the Community Website. Links for each of the tutorials are cited below:

AGE	http://www.a2jauthor.org/drupal/?q=node/220
DATE	http://www.a2jauthor.org/drupal/?q=node/221
DOLLAR	http://www.a2jauthor.org/drupal/?q=node/231
HASANSWERED	http://www.a2jauthor.org/drupal/?q=node/225
HESHE & HISHER	http://www.a2jauthor.org/drupal/?q=node/232
ORDINAL	http://www.a2jauthor.org/drupal/?q=node/223
ROUND	http://www.a2jauthor.org/drupal/?q=node/284
ROUND2	http://www.a2jauthor.org/drupal/?q=node/284
SUM	http://www.a2jauthor.org/drupal/?q=node/224
TODAY	http://www.a2jauthor.org/drupal/?q=node/222
TRUNC	http://www.a2jauthor.org/drupal/?q=node/285
TRUNC2	http://www.a2jauthor.org/drupal/?q=node/285

Writing Repeat Dialogs

A Repeat Dialog is a series of questions that will continue to loop based on criteria that you set. If the same type of information needs to be collected several times, such as children’s names or assets, you can write a repeat dialog to collect the series instead of using multiple questions, thus greatly increasing the efficiency in interview drafting.

There are two different approaches to creating a Repeat Dialog. While the approaches themselves are different, the results are the same: the end-user is asked the same questions more than once, as required. The two approaches are: 1) ask the end-user up front for the number of times a series should be repeated; and, 2) ask the end-user at the end of the series if they would like to repeat the series.

Ask the End-User Up Front for the Repeat Number

This approach is useful when the end-user will know how many times the questions will need to be repeated. An example of this is asking the end-user how many children they have, and then looping through and collecting the name of each child.

- (1) **Step 1:** Set up the Counting Variable under the Buttons Tab of the First Question in the Repeat Dialog (Figure 148).
 - a. The Counting Variable will “count” how many times the end-user loops through the repeat dialog.
 - b. NOTE: The “Set Repeat Variable to 1” option is selected and The Repeating Variable Counter box contains the name of the repeating variable.

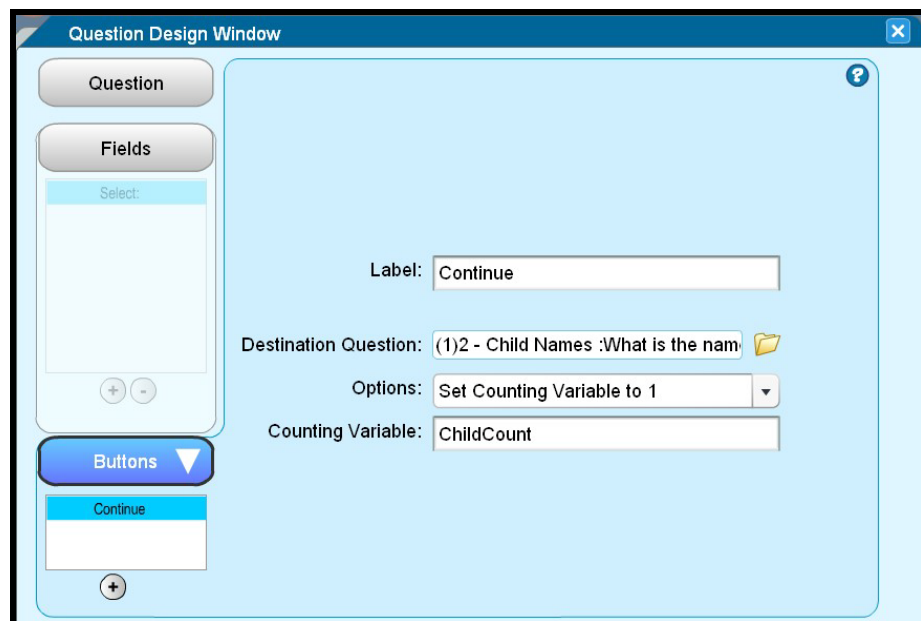


Figure 148: Counting Variable setting under Button Tab.

- (2) **Step 2:** In the first question, ask the end-user how many times the repeating question should be asked (Figure 149).

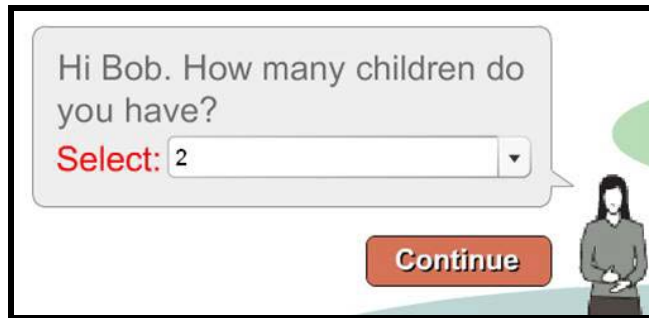


Figure 149: Question to determine how many times to repeat.

- (3) **Step 3:** Ask the end-user the repeating question and set up the question as a repeating question.
- a. Identify the Counting Variable in the Counting Variable field of each question in the repeat dialog (Figure 150). Design the variable names of the input fields as usual (Figure 151).



Figure 150: Identify Counting Variable in each question of the Repeat Dialog.

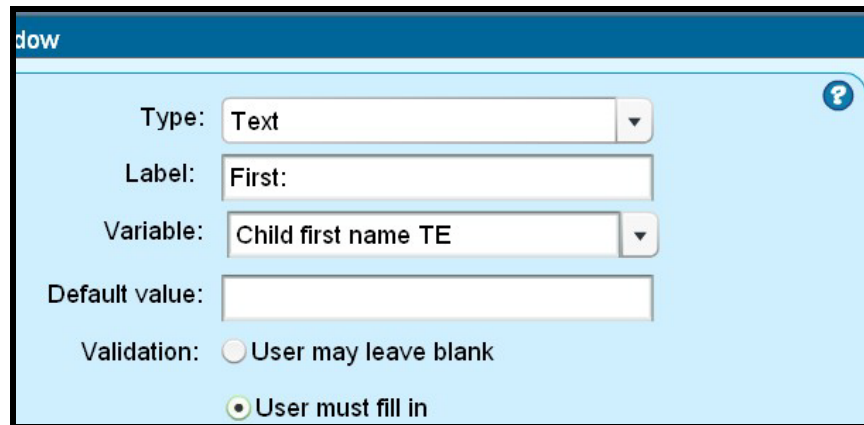


Figure 151: Normal variable name for each of the input fields.

- (4) **Step 4:** Increment the Counting Variable when the end-user answers the last of the repeating questions (Figure 152).
 - a. **NOTE:** The button's option is set to increment the counting variable. When this button is pressed the counting variable will be incremented by 1. Also note that A2J Author will increment a counting variable only after it as performed any advanced conditions.

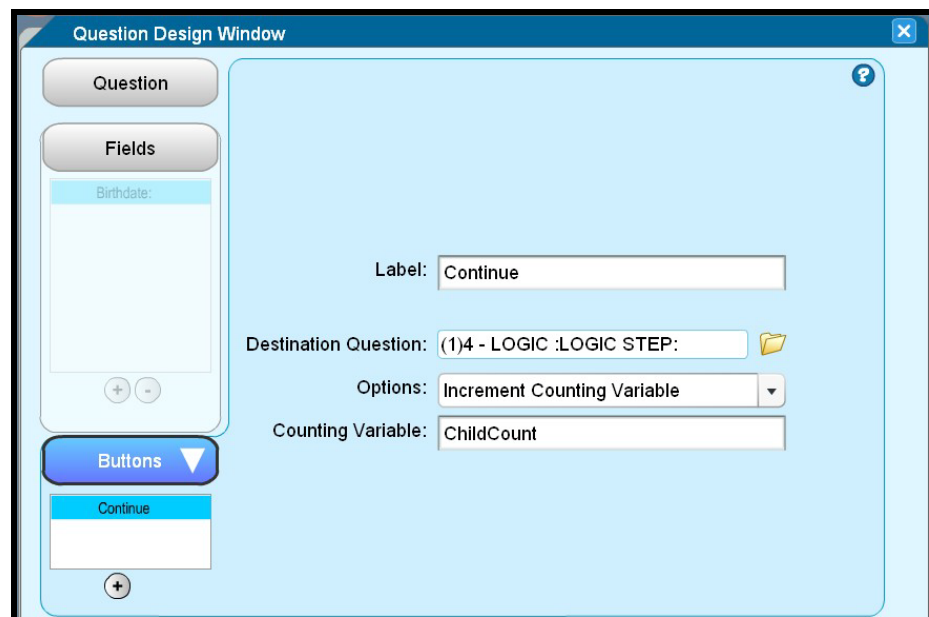


Figure 152: Increment Counting Variable on last question.

- (5) **Step 5:** Include conditions to determine if the questions should be repeated or if the end-user may move to the next interview question (Figure 153). You can set the logic in one of two ways, either 1) in the advanced tab of the last question in the dialog or 2) in an additional “logic” question. If you use the latter format, be sure to set the condition to occur “before question is displayed.”
- a. The first logic statement should be in the following format:
 - i. Condition: $ChildCount \geq NumberOfKids$ (Note: If using a separate logic question, then use the condition $ChildCount > NumberOfKids$.)
 - ii. Actions: If: True, Action: go to question, Question: [set the destination for a question outside of the loop to exit the end-user from the dialog]
 - b. The second logic statement should be in the following format:
 - i. Condition: $ChildCount < NumberOfKids$ (Note: If using a separate logic question, then use the condition $ChildCount \leq NumberOfKids$.)
 - ii. This time set the destination for the first question in the loop so that the series can repeat.

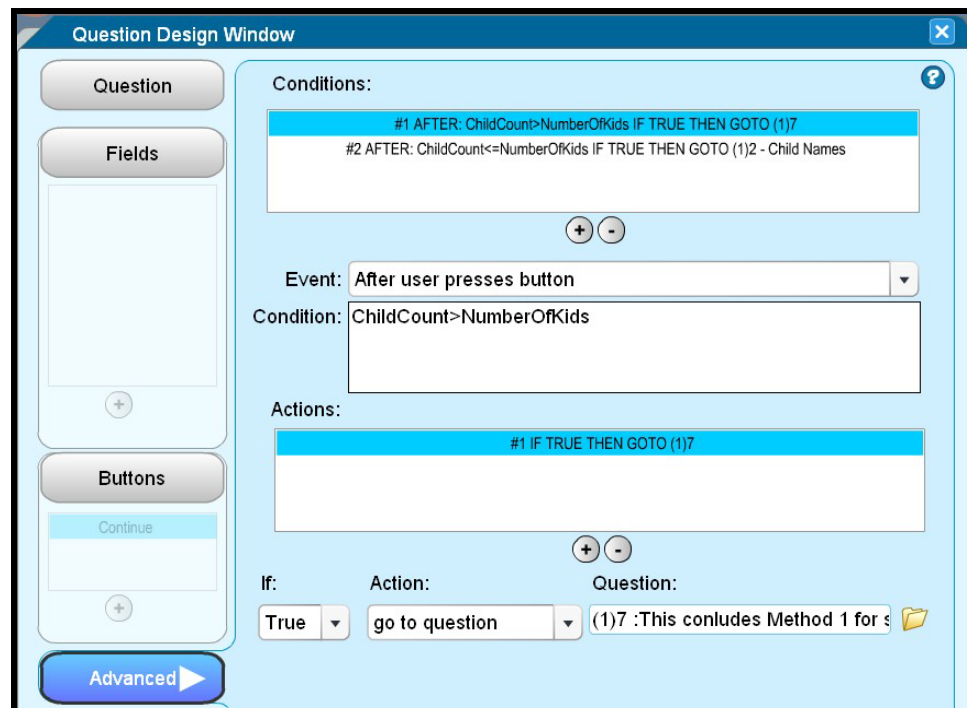


Figure 153: Two conditions to evaluate whether to repeat the dialog.

Ask the End-User at the End if They Would Like to Repeat

This approach is useful when the end-user may not know how many times the questions may need to be repeated. Below are screen shots that will demonstrate how to set up this type of Repeat Dialog.

- (1) **Step 1:** Set up the Counting Variable (Figure 154).
 - a. NOTE: Set the counting variable to 1 option is selected and the Counting Variable field contains the name of the counting variable.

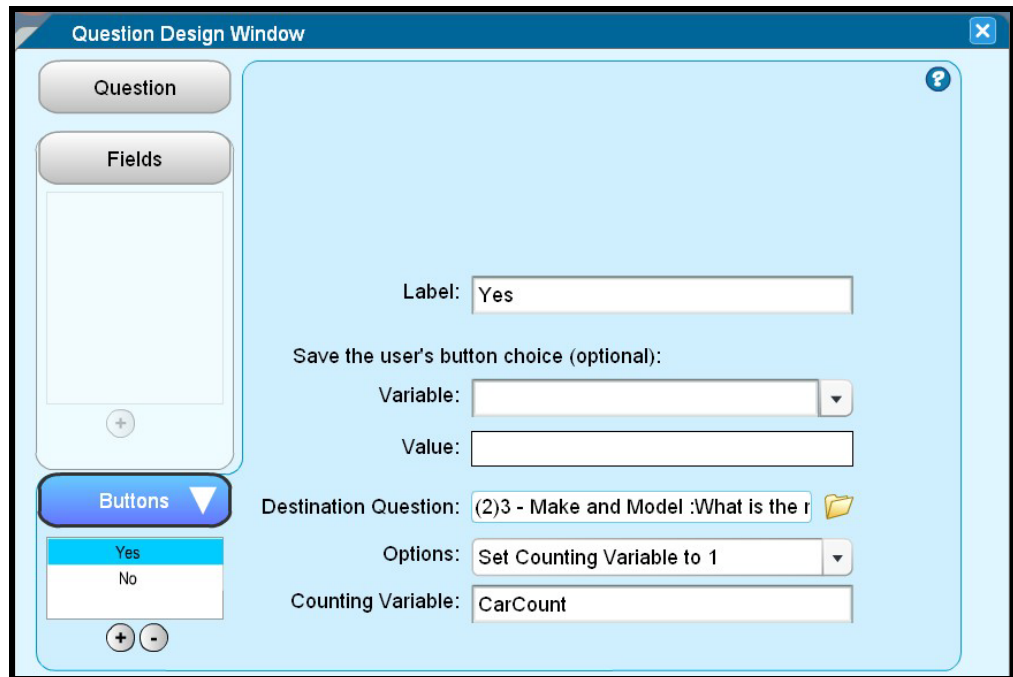


Figure 154: Set Counting Variable to 1 in Buttons Tab.

- (2) **Step 2:** Ask the end-user the questions that will be contained within the repeat dialog and set up those questions as repeating questions by identifying the Counting Variable each time (Figure 155).
 - a. NOTE: In the Question Tab, the counting variable field contains the name of the counting variable. However, the variable names of each of the input field should be designed as usual (Figure 156).

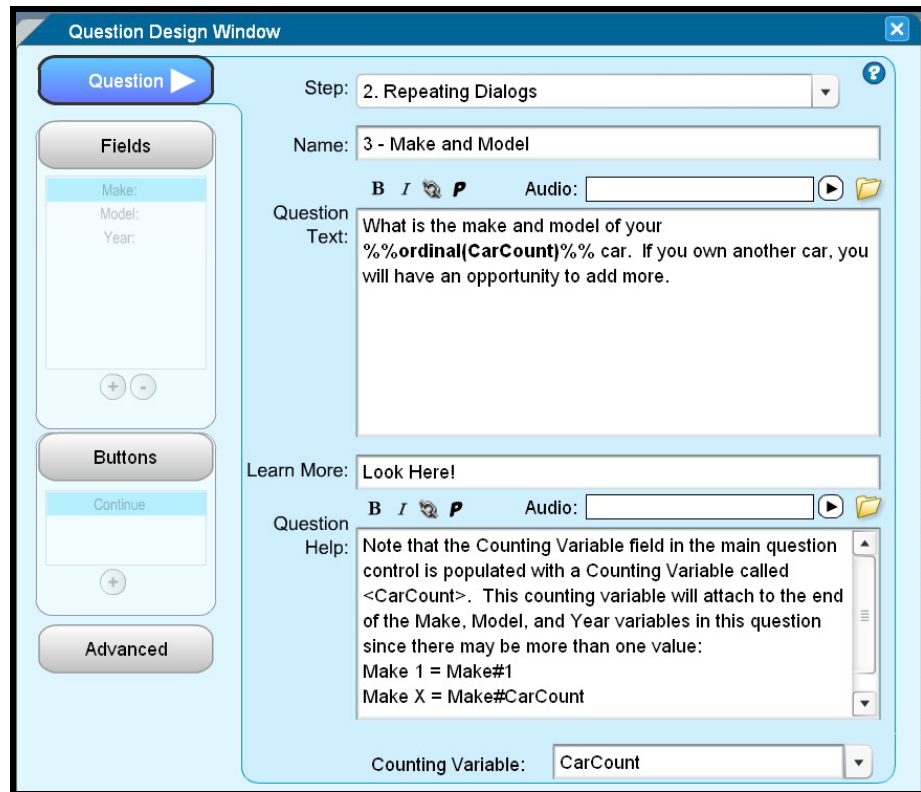


Figure 155: Identify Counting Variable for each Question in the Repeat Dialog.

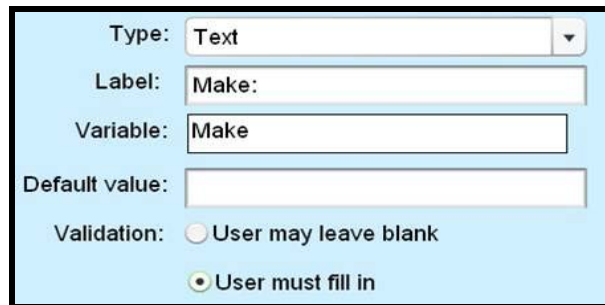


Figure 156: Set variables for input fields as normal.

- (3) **Step 3:** Then, ask the end-user if they would like to enter more data (Figure 157):

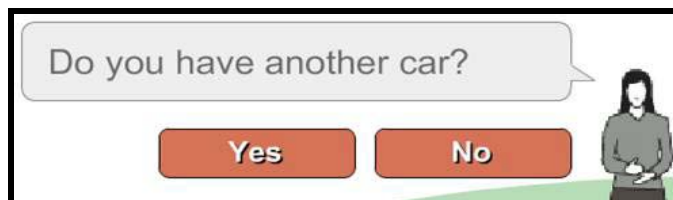


Figure 157: “Add Another?” Question.

- (4) **Step 4:** If the end-user wants to enter more data then the counting variable should be incremented on the last question (Figure 158), and the end-user sent to the first question in the repeat dialog.
- a. NOTE: The button's option is set to increment counting variable and the counting variable field contains the name of the counting variable. When this button is pressed the counting variable will be incremented by 1.

The screenshot shows the 'Question Design Window' with the following configuration:

- Question:** (Empty)
- Fields:** (Empty)
- Buttons:**
 - Yes (Selected)
 - No
- Save the user's button choice (optional):**
 - Variable: (Empty)
 - Value: (Empty)
- Destination Question:** (2)3 - Make and Model :What is the r
- Options:** Increment Counting Variable
- Counting Variable:** CarCount

Figure 158: Increment Counting Variable attached to Yes Button.

Accessing Repeat Variables

If a variable named, "Child first name TE" is used in a repeat dialog, and the end-user ultimately enters two (2) values (e.g., Bob and Cindy), the following table shows how to access these variables in the text of a question.

Variable	Value
%%[Child first name TE]%%	Bob and Cindy
%%[Child first name TE#1]%%	Bob
%%[Child first name TE#2]%%	Cindy



A training module for creating Repeat Dialogs is available at:

<http://www.a2jauthor.org/drupal/?q=node/233>

Reports Tab

Spellcheck, peer review, and troubleshooting of your interview can all be done with the help of a report.

Reports of A2J Guided Interviews[®] are available in two formats: Full Report and Script for Audio. To create a report, first select the “Report” navigation button to arrive at the Report tab where you will find a “Create Report” button for the Full Report format and a “Create Script” button for the Script for Audio format. Either report type can be viewed and, ultimately, printed by selecting the button for the desired report (Figure 159).

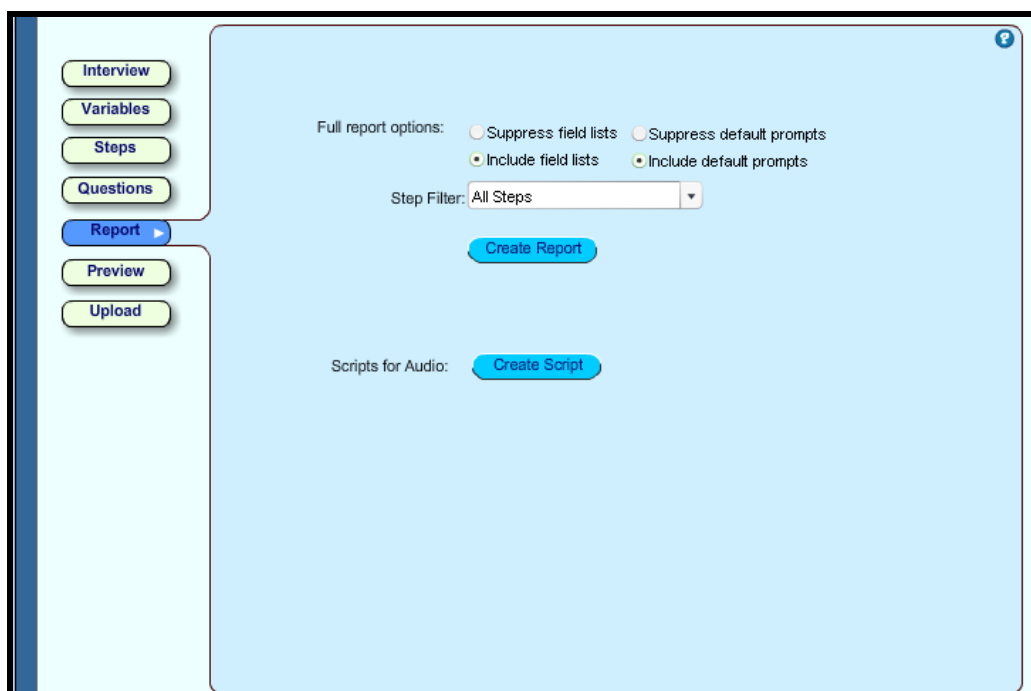


Figure 159: Report Tab options include a Full Report and a less detailed Script for Audio report.

Upon selecting either the “Create Report” or “Create Script” button, the corresponding report is populated in your internet browser for viewing. You can save the report by copying the text ([Ctrl]+A and [Ctrl]+C) and pasting it ([Ctrl]+V) into a text editor. A description of the features and purposes of each report type is found below.

Full Report

A Full Report can be used for troubleshooting an interview or peer review. On the Report tab you will find “Full report options” which include filters for limiting the interview information shown in a Full Report. These filters include radio button options for “Suppress field lists” or “Include field lists,” Suppress default prompts” or “Include default prompts,” and a drop down menu “Step Filter.” The defaults are set to include the most information you may obtain in a Full Report.

A Full Report with the default settings of “Include field lists,” “Include default prompts,” and “All Steps” includes the following elements:

- * the metadata recorded under the Interview Tab (Figure 160);

My Interview	
Interview	
Title	My Interview
Jurisdiction	Jurisdiction of my interview
Language	English
Avatar	blank
Author	Anonymous
Allow Send Feedback?	Yes
Feedback Email	webmaster@legalaid.org
Exit	(4)5-Exit Question
Version	3/29/2010
Created by A2J version	2010-01-19
Description	This is a description of my interview.
History	Interview created 3/29/2010
Templates	
Custom End Graphic	C:\Users\user\Documents\Logo.PNG
Custom Branding Logo Graphic	C:\Users\user\Documents\Logo.JPG
File name	C:\Users\user\Desktop\My Interview.a2j

Figure 160: Interview metadata section of a Full Report.

- * a complete list of the variables (Figure 161);

Variables	
Name	Questions
User Gender	(0) 3-Gender
Client first name TE	(0) 2-Name
Client middle name TE	(0) 2-Name
Client last name TE	(0) 2-Name
User Avatar	

Figure 161: Variables List in a Full Report.

- * a list of the interview's Steps (Figure 162); and,

Steps
0. ACCESS TO JUSTICE
1. DO YOU QUALIFY?
2. DO YOU AGREE?
3. YOUR INFORMATION

Figure 162: Steps List in a Full Report

- * the details of each Question (Figure 163).

Question Name	1-Sample (4)								
Text	Text of my first question goes here.								
Text Audio	1-1-Sample.mp3								
Learn	Here is a sample Learn More question?								
Help	Here is sample text for Question Help . Click here to see the pop-up text.								
	Hypertext	Popup text							
	Click here	Here is some sample text in a pop-up. 1-1-pu-Clickhere.mp3							
Help Audio	1-1-h.mp3								
Fields	Label	Variable	Value	Type	Optional	Min	Max	Prompt	List
	Please explain:	Explain script TE		textlong	Required	-	-	You must type a response in the highlighted space before you can continue. 1-1-p-explainscript.mp3	-
Buttons	Label	Variable	Value	Next					
	Exit			[Exit - User does not qualify] http://www.a2jauthor.org					
Macros	Event	Condition			Action				Comment
	BEFORE	HASANSWERED([Client middle name TE])			<ul style="list-style-type: none"> • IF TRUE THEN SET Client name TE=%[Client first name TE] + " " + [Client middle name TE] + " " + [Client last name TE]%% • IF FALSE THEN SET Client name TE=%[Client first name TE] + " " + [Client last name TE]%% 				

Figure 163: Sample format of Question in a Full Report.

If you would like less information or specific information shown in a Full Report the following filters are available: Suppress Field Lists, Suppress Routine Prompts, and the Step Filter.

Suppress Field Lists

If you have attached a list to a question for use in a drop down menu, for example the names of all the U.S. states, in a Full Report you will see that list of all the states displayed. Depending on the length of your list this could take up quite a bit of space in your report. If you select the “Suppress field lists” radio button instead of the default “Include field lists” then your attached lists will not be shown in detail (Figure 164).

Suppress Routine Prompts

In a Full Report with the default option “Include default prompts” selected, you will see the language entered as a prompt for each interview question displayed in the Question section of the Full Report. If you do not wish to see this language for each question, select “Suppress default prompts” and then you will see “default” instead of the prompt language for each question.

Suite/Floor:	HOA address 2 TE		text	Optional	-	-	[default]	-
City:	HOA city TE		text	Required	-	-	[default]	-
State:	HOA state MC		textpick	Required	-	-	[default]	List file: C:\Users\user\Documents\Work-CAJT\Collaborations\CaliforniaHomeowners\US_states.xml
Zip Code:	HOA zip TE		number zip	Required	-	-	[default]	-

Figure 164: Full Report Question without the Prompts and Field Lists

Question 2-HOA Info (54)
Text First, please provide the address information for the HOA or its [agent](#):

Hypertext		Popup text						
agent		Again, the property manager, a debt collector, or an association attorney may be the entity who has billed you. Please provide the address information of the person who has billed you. If you have made payment arrangements with the HOA, then make the payment to them.						
Fields								
Label	Variable	Value	Type	Optional	Min	Max	Prompt	List
HOA or agent:	HOA or agent name TE		text	Required	-	-	You must type a response in the highlighted space before you can continue.	-
Address:	HOA address 1 TE		text	Required	-	-	You must type a response in the highlighted space before you can continue.	-

Figure 165: Full Report Question showing the Default Prompts

Step Filter

If you wish to review only a certain section of interview questions in a Full Report, this drop down filter will allow you to choose which “step” in the interview to display. The default setting is to show the questions for “All Steps,” but you may choose one individual Step for your Full Report instead.

Script for Audio

A Script for Audio is a slimmer version of the Full Report, only including the relevant text of the interview for purposes of spell checking and recording audio clips. Of course, like the Full Report, it may also be used for peer review of the text of the interview. A short sample of its format is pictured below (Figure 166).

My Interview

Questions

0: 1-Introduction
This is the introduction.

0: 2-Name
Enter your name.

Field	Prompt
First: (text)	You must type a response in the highlighted space before you can continue.
Middle: (text)	You must type a response in the highlighted space before you can continue.
Last: (text)	You must type a response in the highlighted space before you can continue.

0: 3-Gender
Choose your gender.

Field	Prompt
Gender: (gender)	You must choose either male or female from the highlighted selection before you can continue.

1: 1-Sample
Text of my first question goes here.

1: 1-Sample.help
Here is a sample Learn More question?
Here is sample text for [Question Help](#). [Click here](#) to see the pop-up text.

Hypertext	Popup text
Click here	Here is some sample text in a pop-up.

Figure 166: Sample format of a Script for Audio.

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Preview Mode

When all else fails Preview, Preview, Preview!

Previewing your A2J Guided Interviews[®] is an essential function of authoring. It is important to “see” what the end-user will see before it is finally uploaded and published over the web. For instance, while authoring an interview, you may find, after previewing it, that you have added too much information in a single Question. Or, you may find that you could have formatted the information better, so as to make the Question more clear for the reader.

Finally, by previewing, you can troubleshoot the interview. You can determine whether Questions are flowing properly and whether information is being properly collected through the use of the variables and conditions you have written into each Question.

This chapter will explain how to enter Preview Mode, conduct a simple preview, and use the Preview Mode toolbox to troubleshoot the interview.

Entering Preview Mode

You can reach the Preview Mode in two ways. First, you can select the “Preview” navigation button from the main menu. The Preview of the interview will begin with the starting question (Figure 167). You can also Preview by selecting the “Preview” button from within the Question Design Window when editing a particular Question. This route allows you to Preview the interview, beginning with the Question which you are currently editing (Figure 168). A2J Author[®] remembers where you began your last preview session, so that if you later select the “Preview” navigation button from the main menu, you will begin a preview at the starting point of the last preview session, instead of at the beginning of the interview.

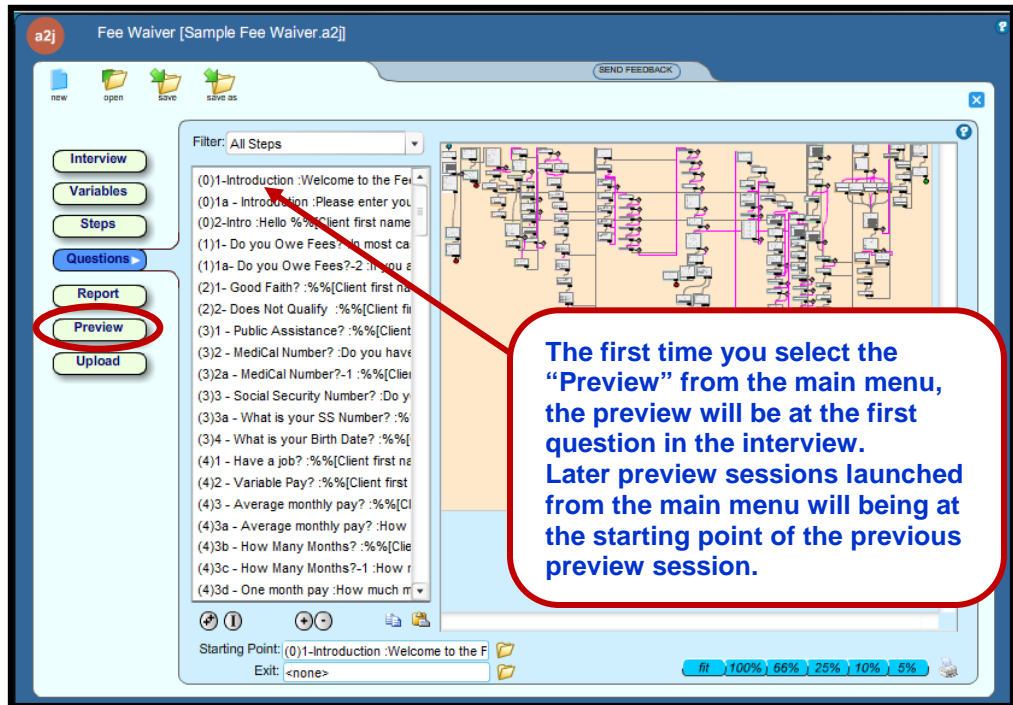


Figure 167: Preview Mode launched from the main menu.

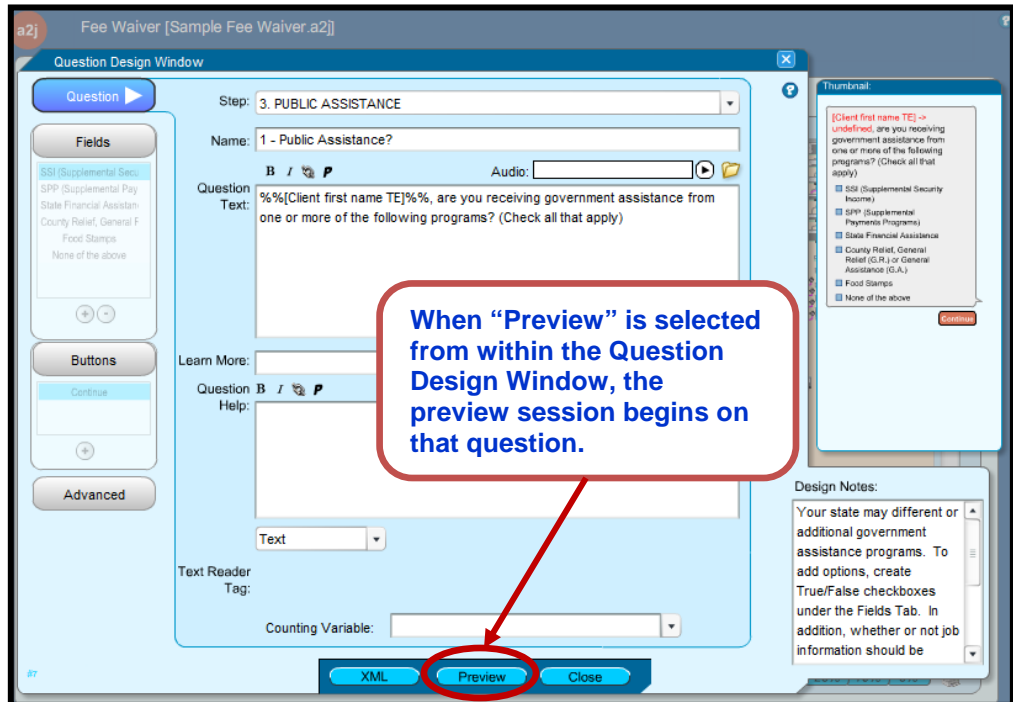


Figure 168: Preview button in Question Design Window

Once in Preview Mode you will see the interview interface and a Preview Mode toolbox (Figure 169). To return to the Question Design Window for the current question, select “Edit This.” (Figure 169). To return to the Question Design Window

for the question where you began your preview session, select the “Resume Edit” button (Figure 169). If you had launched your preview session from the main menu, then you will be returned to the Question tab interface (Question List and Flowchart).

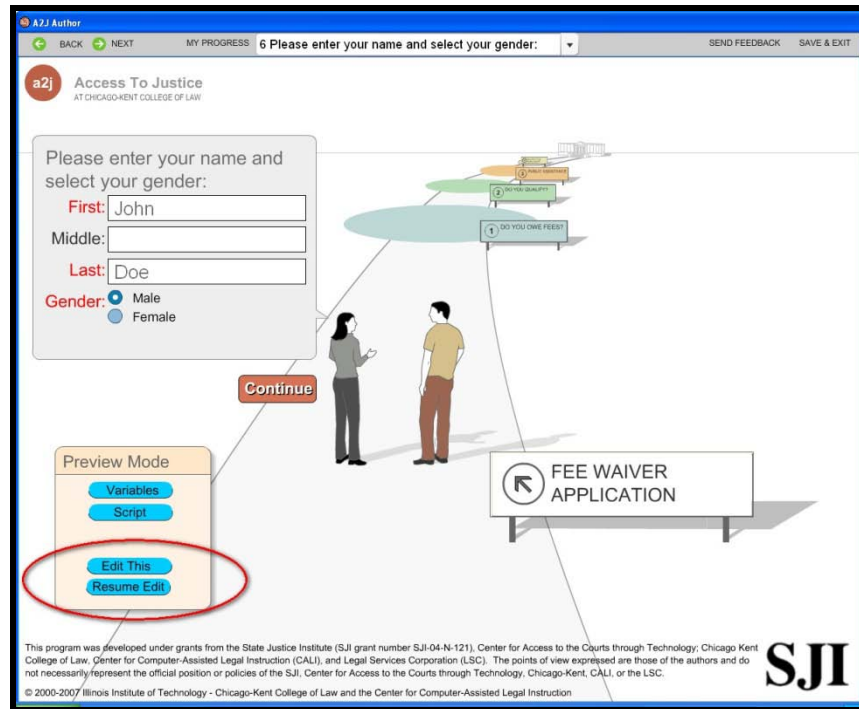


Figure 169: Preview Mode

Simple Preview for Formatting and Content

A simple preview of a Question allows you the opportunity to test a number of formatting concerns. Here is a list of items that can be checked while conducting a simple preview of a question:

1. **BUTTONS:** Does the button work properly? Does the question connect to the intended question? Even if the button works properly, does the flow make sense to the end-user? Is it logical?
2. **REQUIRED FIELDS:** Are all of the required fields programmed as “user must fill in”?
3. **FORMATTING:** Is the formatting of the text in the question, pop-ups, and question help clear? Is it too verbose?
4. **HYPERLINKS:** If there are hyperlinks, do they work? Should more words be included in the hyperlinked phrase to ensure the end-user will not have trouble selecting the link?

Previewing to Troubleshoot

Preview Mode includes a toolbox (Figure 170) from which you can select an Interview Variables window and an Interview Script window. Both of these items are crucial to troubleshooting an interview.

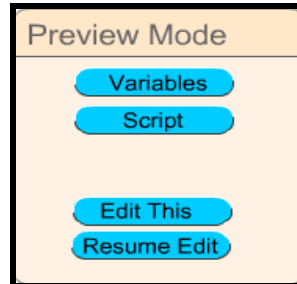


Figure 170: Preview Mode Toolbox

Interview Variables Window

The Interview Variables window contains the names of each variable and its value as it is collected during the preview of the interview (Figure 171). In the event you test a repeat dialog, the window will show, under the “Loop” heading, how many times you have repeated a loop. For instance, if you repeated a loop three times to collect names of children, the list would show the variable “Child first name TE” three times in the Variables list, with a 1, 2, and 3 listed in the adjacent Loop column, respectively.

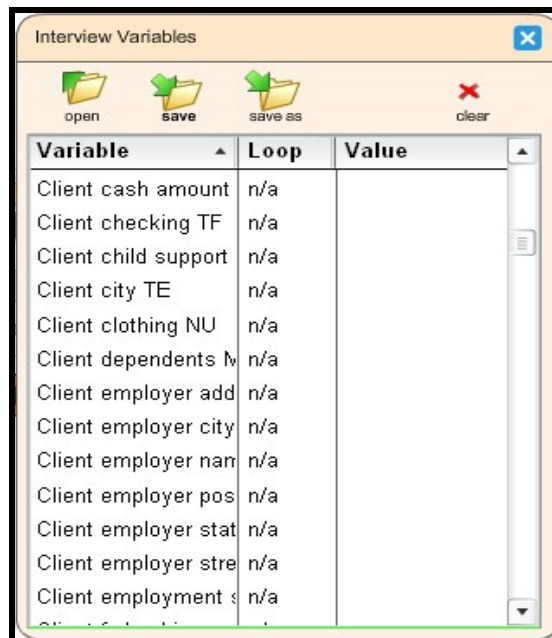


Figure 171: Interview Variables window.

Testing and retesting is made easier by the open, save, save as, and clear buttons all located at the top of the Interview Variables window. Using the “clear” button,

represented by a red “X”(Figure 171 and Figure 172), you can retest a question with new data.

If you do not have time to finish testing an interview, the collected variable values can be saved, by selecting the “save” button. To resume testing, enter Preview Mode using the Question Design Window for the last Question tested. Once in Preview Mode you can open a previously saved answer file by using the “open” button.

Variations of the test values can be made by clicking on a variable’s value and entering a new value. Variations of the variable values collected during any session can be saved using “save as.”



Saving a complete answer file is a mandatory component of testing an interview with its corresponding HotDocs® template. For more information on testing an interview with a HotDocs® template, see the “Testing an A2J Guided Interview™ with HotDocs®” chapter.

The Interview Variables window is very helpful in troubleshooting because it tells you immediately if you have failed to assign a variable to a field (Figure 172). If no value is reflected in the Interview Variables window after completing the question being tested, then you know you have to check the Question for a variable.

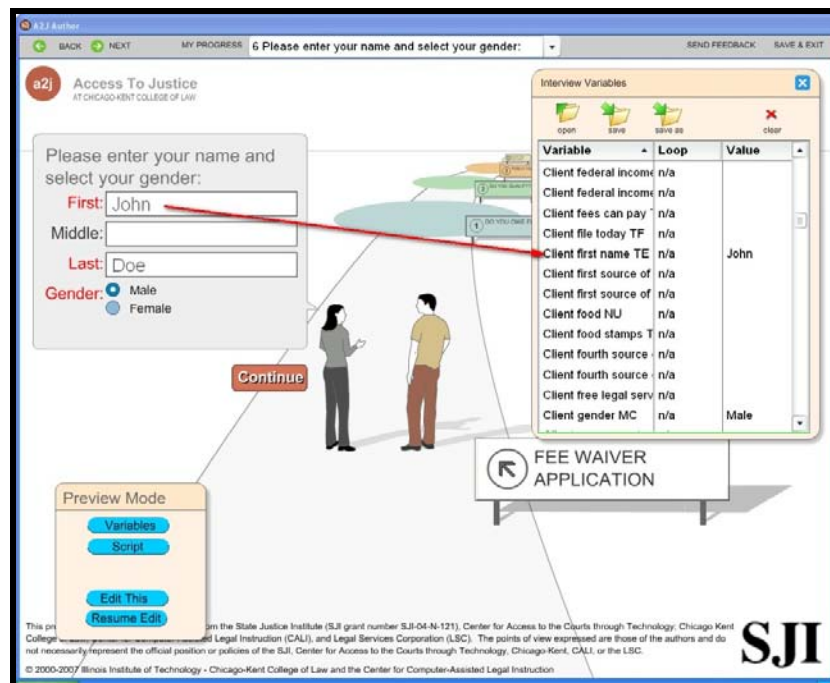


Figure 172: Interview Variables window in Preview Mode.

Interview Script Window

The Interview Script window allows you to inspect how A2J Author[®] is treating each action associated with a question (Figure 173).

QUESTION,
BUTTON
SELECTION, &
VARIABLES:

The Interview Script window will first show you the name of the question you are evaluating. In Figure 173, the first question listed is “(4)2 – Variable Pay?.” The window will then identify which button was selected as you moved through the question. In Figure 173, the button selected was “Continue.” The window will then reveal the variables for which the question was seeking values and the value of the variables collected upon clicking the button. In Figure 173, the variable “Client pay change MC” collected the value “changes.”

Similar to the Interview Variables window you will find a “clear” button located at the top of the Interview Script window, represented by a red “X”. Using the “clear” button removes the actions you have already tested from the scripting window so that you can easily test and retest a question with new data.

EVALUATING
CONDITIONS:

The Interview Script window will also show the evaluation of every advanced condition contained within that question. More specifically, a condition is shown in green if the condition evaluates as true. When a condition evaluates as true, the Interview Script window will also show how A2J Author[®] handled the actions conditioned on the advanced condition script.

If the conditioned action is to set the value of another variable, the window will show that it has “SET” a variable's value according to the advanced condition scripting. As multiple values for multiple variables can be set off of one condition, it is possible to see a number of “SET” statements following a true (green) condition statement. If the conditioned action is to alter the destination question at that point in the interview, the window will show that the interview will “GOTO” the question designated in the advanced condition scripting.

In other words, this window lets you know what A2J Author[®] is “thinking.”

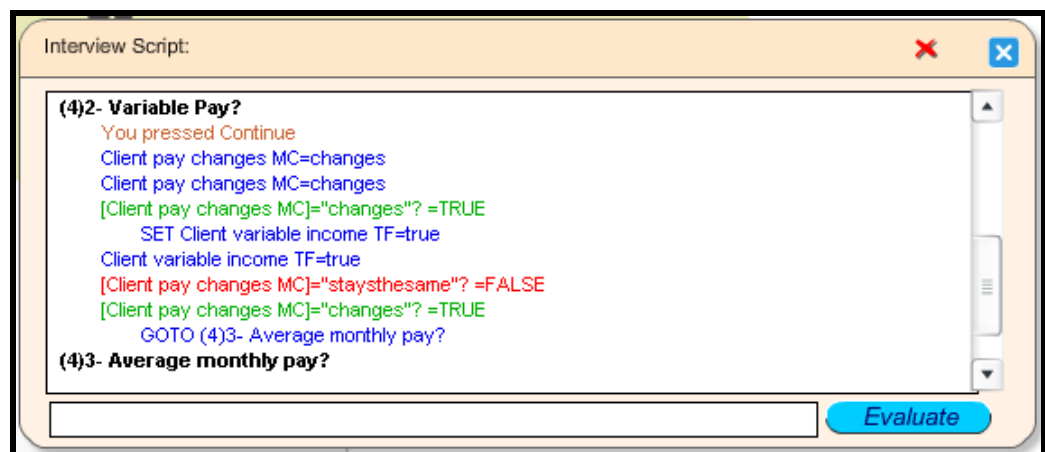


Figure 173: Interview Script example.

In the example above, the variable “Client pay change MC” was used to collect one of two values from a multiple choice question using radio buttons. The two values used in the multiple choice were “changes” and “staysthesame.” After the tester pressed “Continue,” which is reflected in the script as “You pressed Continue,” you can see that A2J Author[®] assigned one of the multiple choice values to the variable, in this case, the value assigned is “changes.”

Then, you can see that three advanced conditions were included in the question. All three advanced conditions tested the value of “Client pay change MC.” The first advanced condition (Figure 169), which appears in the Interview Script as “[Client pay change MC]= “changes”?,” tested if the value of the variable equals “changes.” Because the value did equal “changes” the condition evaluated as true and is in green text. Furthermore, because the condition was true A2J Author[®] completed the conditioned action, which was to set the value of another variable. The Interview Script represents the setting as “SET Client variable income TF = true.”

The second advanced condition (Figure 169), which appears in the Interview Script as “[Client pay change MC]= “staysthesame”?,” tested if the value of “Client pay change MC” was equal to the value “staysthesame.” Because that was not the value of that variable, the condition statement was evaluated as false and is in red text. Thus, none of the actions predicated by that condition were completed.

The last advanced condition (Figure 169), which appears in the Interview Script as “[Client pay change MC]=“changes”?,” tested again if the value of “Client pay change MC” was equal to the value “changes.” The conditioned action was to set the destination question as question “(4)3-Average monthly pay?” Because the condition evaluated as true, the interview was directed to the destination question set by the condition. The Interview Script represents the setting as “GOTO (4)3-Average monthly pay?”

TESTING AN
EXPRESSION:

You can also inspect variables and run expressions in the Interview Script window. Just type in the expression and press the evaluate button. NOTE: Pressing enter will not evaluate your expression but will instead cause a button within the interview to be selected. So be sure to click on the evaluate button with the mouse when using that feature.

INTERVIEW
SCRIPT
DECODER:

In the chart below you will find a description of each type of colored text in the Interview Script window and what it represents. In addition, the chart provides a definition of the action commands “SET” and “GOTO.”

Interview Script Decoder	
Black text	The name of the question being evaluated.
Tan text	Represents what button was selected. The statement is prefaced by the words “You pressed.”
Blue text	Variables for which the question is collecting values in any type of field, text, number, radio buttons, checkboxes, etc. If it appears underneath a green advanced condition statement, then the variable is being set as a result of the condition.
Green text	Advanced condition evaluation. If the advanced condition is in green, it represents that the condition is true. Any actions set as a result of the condition, either to “SET” a variable or to “GOTO” another question, will be reflected below the condition and indented.
Red text	Advanced condition evaluation. If the advanced condition is in red, it represents that the condition is false.
“SET”	The word “SET” shows what variable is being set with a predetermined value as a result of a condition being true.
“GOTO”	The word “GOTO” shows what destination question the current question is being directed to as a result of a condition being true.

Upload A2J Guided Interviews® to LawHelp Interactive

“Associate” your HotDocs® Templates with your A2J Guided Interviews® on the “National Server”

The majority of A2J Guided Interviews® uploaded to LawHelp Interactive (“LHI” or “the national server”) are used for document assembly in conjunction with HotDocs® templates. In order for document assembly to function properly on the national server, A2J Guided Interviews® must be associated with their corresponding HotDocs® templates. Association of the interview and template are accomplished through the upload process.



Note: A HotDocs® template must be uploaded to the national server in order to upload an A2J Guided Interview. So, even if the purpose of your A2J Guided Interview is to provide information to the end-user and not necessarily to assemble a document, you will still need to create a simple document in HotDocs. Often, developers will design a simple one-page information sheet on the relevant topic area.

In this chapter you will find instructions for the following:

- * Setting Up HotDocs® for uploading HotDocs® Templates
- * Obtaining the HotDocs® Template ID and URL
- * Uploading A2J Guided Interviews® to LHI

Setting Up HotDocs® for Uploading Templates

- (1) Highlight the template that you want to upload in the HotDocs® library.
 - a. Note: The template you highlight and upload should be the master template. If this is an update, it should be the same template you uploaded to create the link.
- (2) Click on Tools → Publishing Wizard (Figure 174)...



Note: You must be a registered template provider with LHI. If you are not a registered user, you may register at <http://www.lawhelpinteractive.org> as a template provider.

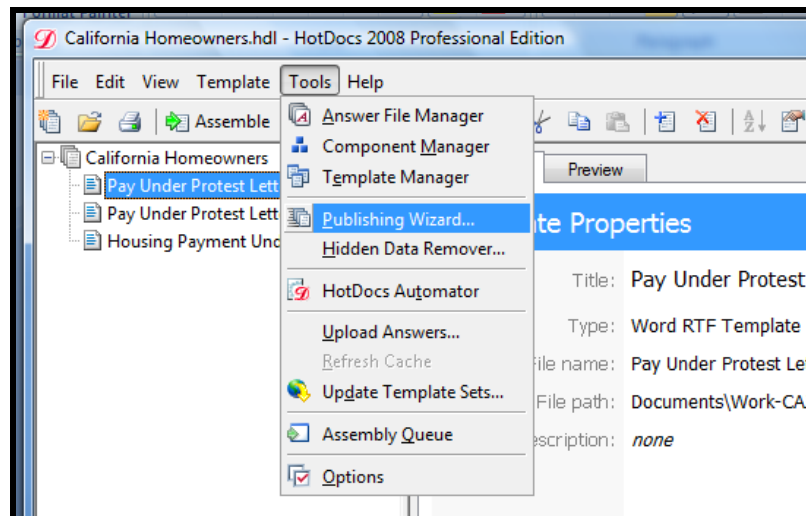


Figure 174: Tools Menu, HotDocs®.

- (3) Select “Template Files for use with HotDocs® Server” (Figure 175).
- (4) Be sure to also select “Include templates used in INSERT and ASSEMBLE instructions” (Figure 175).

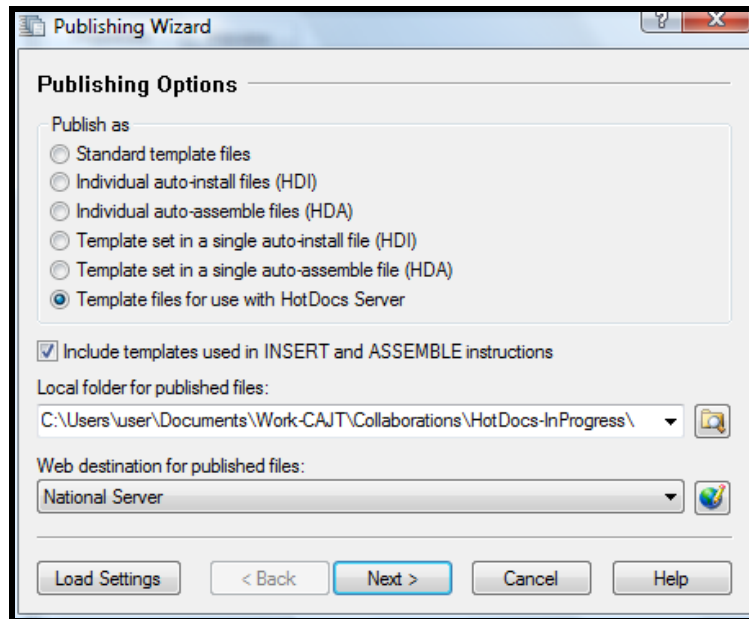


Figure 175: Set a destination for Local Folder in the Publishing Wizard.

- (5) Set a destination for **Local Folder for Published Files**. This can be any temporary directory.
- (6) Click on the pencil on the lower right side of the dialog box.
 - a. In **Web Destination** type in:
http://upload.lawhelpinteractive.org/HD_Upload.aspx.
 - b. In **Friendly Name** type in: National Server
 - c. Click OK (Figure 176)

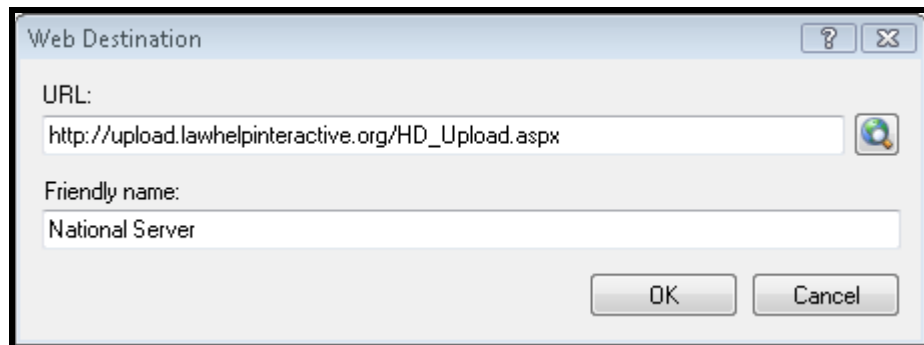


Figure 176: Set a Web Destination and corresponding “Friendly Name”.

- (7) Now make sure that the **Web Destination for published files** is set to “National Server.”

- (8) Click Next
- (9) Click Finish
- (10) Click OK when the following screen appears (Figure 177):

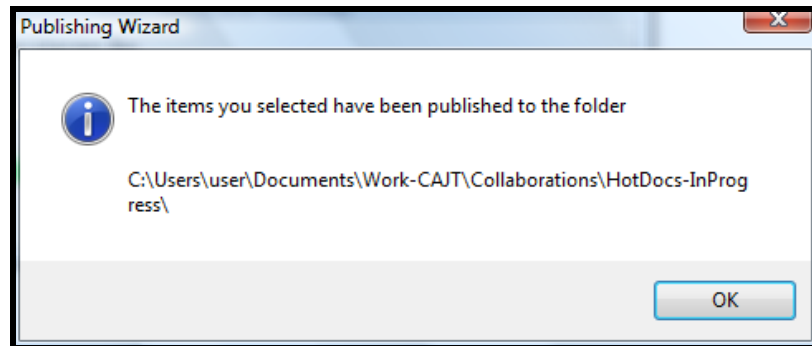


Figure 177: Finish the Publishing Wizard by selecting OK.

- (11) Component Files should also be optioned to work with HotDocs Server.
 - a. Open the Component Manager (Figure 178);
 - b. Open the Component File Properties (Figure 178);
 - c. Locate the HotDocs Server tab (Figure 178); and,
 - d. Check "Enable template for use with HotDocs Server" (Figure 178).

UPLOAD A2J GUIDED INTERVIEWS®
TO LAWHELP INTERACTIVE

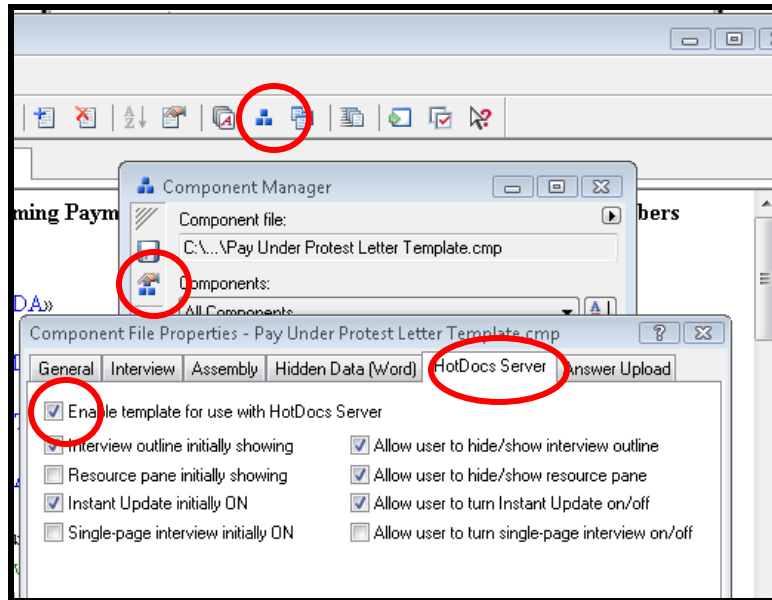


Figure 178: Component File Properties Dialog Box.

Obtaining the HotDocs® Template ID and URL on LHI

- (1) Using HotDocs®, upload the HotDocs® template that is associated with your A2J Guided Interview to the national server and activate it. (Note: If the HotDocs® template has already been uploaded you do not need to upload it again. Simply log-on to the LHI server; select the “Manage Content” link; select and “view” the template to obtain the Template ID number; and, proceed with uploading the A2J Guided Interview.)
 - a. Select the button that says “Click to upload template files.”

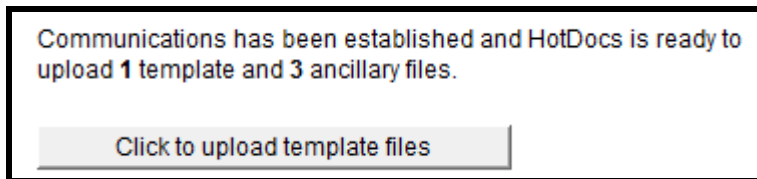
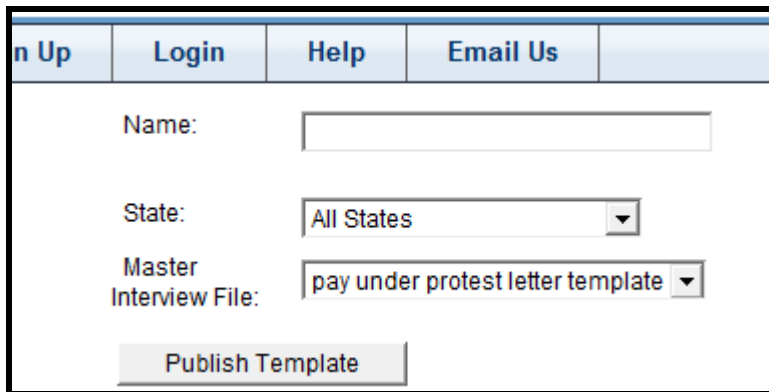


Figure 179: Click to upload template files

- b. In the next browser window, type a name for the template in the Name Field, select the state that you are in, and if you are uploading a template that has several attachments, make sure that the Master Interview File is selected. Then click “Publish Template.”

A screenshot of a web form. At the top, there is a navigation bar with links: "n Up", "Login", "Help", "Email Us". Below the navigation bar, the form has three rows of input fields:

- Row 1: "Name:" followed by a text input field.
- Row 2: "State:" followed by a dropdown menu showing "All States".
- Row 3: "Master Interview File:" followed by a dropdown menu showing "pay under protest letter template".

At the bottom of the form is a button labeled "Publish Template".

Figure 180: Name the template to obtain template ID

- c. Once the HotDocs® template is activated make sure to note the **Template ID** as shown in Figure 181. You will need the HotDocs® Template ID later. You can view the Template ID at anytime by viewing the Template properties.

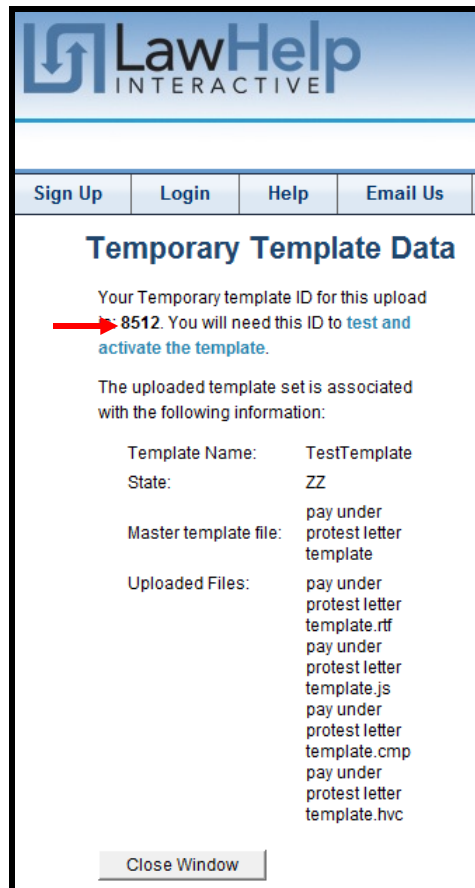


Figure 181: Obtain Temporary Template ID from LHI server. Record it and don't lose it!

- (2) Once you have recorded the **Temporary Template ID**, close the browser window and open another. Go to lawhelpinteractive.org and log in. You must be registered as a template provider on the LawHelp Interactive system.
- (3) Once you have logged in, click on “Manage Content,” see Figure 182.

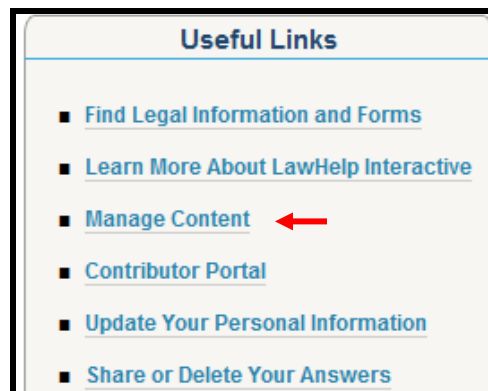


Figure 182: Manage Content link.

- (4) From the manage content screen, select “Template” from the “Add New” drop-down menu located in the upper right-hand corner of the screen. See Figure 183.

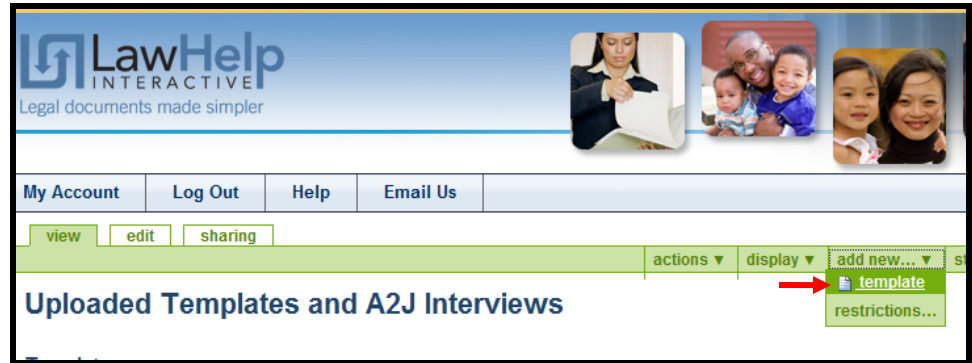


Figure 183: Template option in Add New drop-down menu.

- (5) Next, you will need to complete some information about the template. First, you will need to enter the following information (see Figure 184):
 - a. **Template Title** (This is a short title for the template that will be visible to the public when they begin an interview.)
 - b. **Template Description** (This is a short description to describe this template. It will be visible to the public when they begin an interview).
 - c. **Temporary Template ID:** input the Temporary Template ID that you recorded earlier.
 - d. **State:** Select the state that this template is for.
 - e. **County:** Type the applicable county or counties for the template. If all counties, type “All.”
 - f. **Available to all registered users?** If you would like other template providers to be able to download this template, then check this box.
 - g. **Display Live Help:** If your program uses LiveHelp and you would like LiveHelp enabled for this template, then check this box.
 - h. **Survey URL:** If you have an existing end-user survey that you would like to associate with this template, then enter the appropriate URL in this field.

Add Template

Template Title ■
A short title for this template.
TestTemplate

Template Description ■
A short description to describe this template.
For testing only

Temporary Template ID ■
This is the ID received from Hot Docs server when you saved the template.
8512

State ■
Idaho
Illinois
Indiana
Iowa
Kansas

County
Enter the county(ies), one per line, where this template is applicable

Available to all users?
Uncheck this box to make this template advocate-only (only runnable by registered advocates and fellow template providers.)

Display Live Help
Check this box to Display Live Help on this template.

Survey URL
Provide a URL pointing to a survey for this template. Please include "http://" at the beginning.
http://

Figure 184: Add Template Fields: Template Title, Template Description, Temporary Template ID, State, County, Available to all users?, Display Live Help, and Survey URL

- (6) Next, you will need to select the appropriate National Subject Matter Index code for the template. First, select “add topic” as shown in Figure 185. Then, complete the first level selection and any subcategories in the Add NSMI items screen. Be sure to select “Add,” so that the code shows up under “Currently selected items,” then select “Save.” First, you will need to enter the following information (see Figure 186):

National Subject Matter Index Code ■
Select NSMI topics by clicking on the Add Topic button.
* add topic.
You must save your changes.

Figure 185: National Subject Matter Index Code "Add Topic" button.

Add NSMI items

Level1
Use this field to make a first level selection.
Other

Level2
Use this field to make a second level selection.
-- Select a sub-category --

Add

Currently selected items:
Other::1990000:1319

Clear Save

Figure 186: Add NSMI items screen.

- (7) If you entered the NSMI code correctly, it will show up in the Add Template screen (see Figure 187):

National Subject Matter Index Code

Select NSMI topics by clicking on the Add Topic button.

add topic...

You must save your changes.

Other::1990000

Figure 187: Add Template Screen showing NSMI code.

- (8) Complete any general purpose notes and select “Save” (see Figure 188):

Notes

General purpose notes area.

save cancel

Figure 188: Notes field and Save button in Add Template screen

- (9) **You're not quite done!** Now click on “Activate Template” (Figure 189). Once the template is activated, a URL will be displayed (Figure 190).

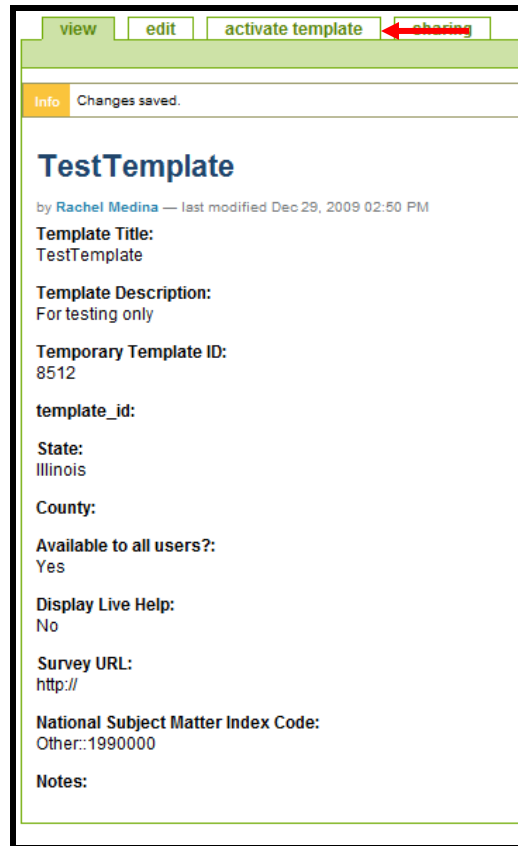


Figure 189: Activate Template button in header menu.

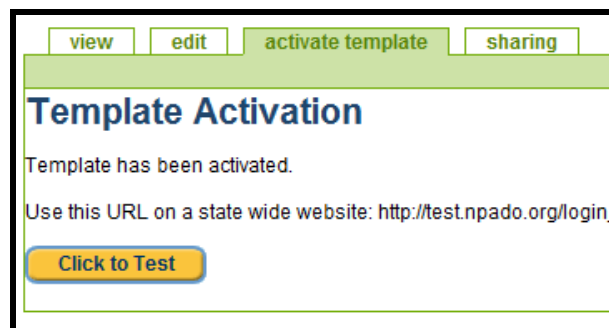


Figure 190: URL generated once "activate template" button is selected.



Note: The URL generated for the HotDocs template will not be used on your website in the event you will be associating the HotDocs template with an A2J Guided Interview. Once you upload the A2J Guided Interview, another URL will be generated which you will ultimately post on your website for access by end-users.

- (10) **VERY IMPORTANT:** If you are using an A2J Guided Interview for this template, click on the “View” tab and record the **Template ID** (not the temporary template ID). You will need the new Template ID number (see Figure 191) later in order to upload the A2J Guided Interview.

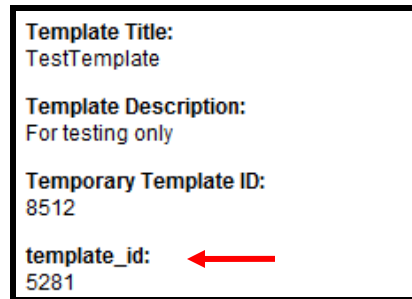


Figure 191: New "Template_ID" available under the "View" tab.

Uploading A2J Guided Interviews® to LHI

- (1) First, verify that A2J Author® is configured to upload to the proper Web address (URL). You will only need to perform this step once.
- a. Double click on My Computer and browse to the directory where A2J Author® was installed. The default installation directory is C:\Program Files\CALI\A2J Author®
 - b. Find the file called “A2JAuthor.ini” and double click on it. The file should open for editing in Notepad.
 - c. Verify that “InterviewUploaderURL=” either of the following:
Version 3.0: http://upload.lawhelpinteractive.org/A2J_Loader.aspx
Version 2.0: http://upload.lawhelpinteractive.org/A2J_upload.aspx
 - d. If you are running Windows XP, modify the entry for “InterviewUploaderURL=”, save the changes and close Notepad.
 - e. If you are running Windows VISTA, you must be an Administrator to make this change, plus take the following additional steps:
 - i. Go to Start Menu; locate "Notepad;" right click on Notepad; select "Run As Administrator;" select file-open; navigate to the .ini file above; make the change; save; and, close.
 - ii. Navigate to **C:\Users\YourName\AppData\Local\VirtualStore\Program Files\Cali** and delete the two .ini files that are there (a2jauthor.ini and a2jviewer.ini)
 - iii. Re-start A2J Author® and run the registration screens.

- (2) Next, you must either attach media files (audio, graphics, and video) to your interview or verify that all media fields are cleared.
 - a. To upload media with your interview, you need to first attach all of your audio, graphics, or video clips throughout the interview (see the “Adding Media” chapter.)
 - b. If you used an interview off of the server as a template for your interview, your interview may have references to media files that you will not be using. Thus, you must clear all references to media files.
 - i. To clear all media file references, select the “Clear All Media” button, located under the Upload Tab (Figure 192).



Figure 192: Clear All Media button found under the Upload Tab.

- (3) You are now ready to upload and activate A2J Guided Interviews®. The process for uploading and activating A2J Guided Interviews® on LHI is nearly identical to the upload and activation process for a HotDocs® template.
 - a. Open A2J Author® and your A2J Guided Interview. (If you have made any modifications to the file after opening it, be sure to save it first before uploading; otherwise, any changes you made will not be uploaded.)
 - b. Click on the upload button in A2J Author® as shown in Figure 193.

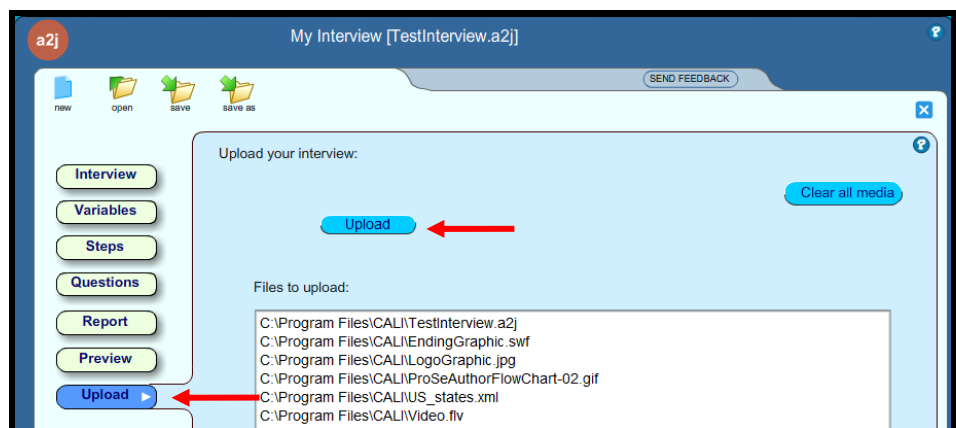


Figure 193: A2J Author Upload Tab and Upload button.

- c. After you click the Upload button a security warning may pop-up verifying you want to run the Interview Uploader program. Select “Run” (see Figure 194). (You may also wish to uncheck the “Always ask before opening this file” checkbox.)

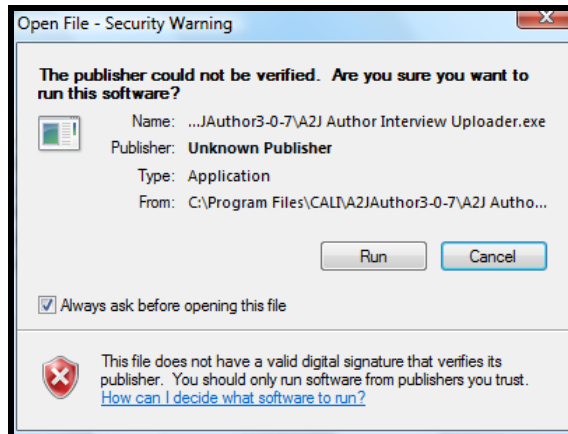


Figure 194: Security Warning for A2J Author Interview Uploader program.

- a. The A2J Author Interview Uploader (see Figure 195) will identify the file sizes for each file being uploaded and the total size of the upload.

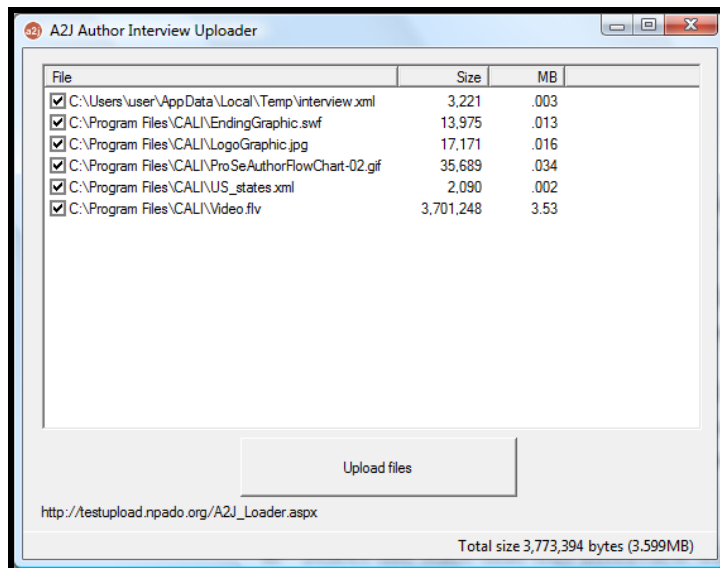


Figure 195: A2J Author Interview Uploader screen.



Note: The A2J Author Interview Uploader is capable of uploading any number of files, each with a file size limit of 100MB. However, the LHI server currently limits interview uploads to a combined file size of 16MB. If you have questions regarding the file size limitation imposed by the LHI server or have an interview that exceeds this limitation, you may e-mail an inquiry to the managers of the server at npado@probono.net.

- e. After you click the Upload Files button in the A2J Author Interview Uploader, a web browser will open up as shown in Figure 196 below prompting you to fill in values to define the A2J Module Properties.
 - i. Enter a name for your interview.
 - ii. **IMPORTANT:** Enter the **Associated Template ID** for the HotDocs® template that you uploaded earlier that will work with this A2J Guided Interview. This will be a number value.
 - iii. Select the state that this Interview will be used in.
 - iv. Click “Publish Template.”

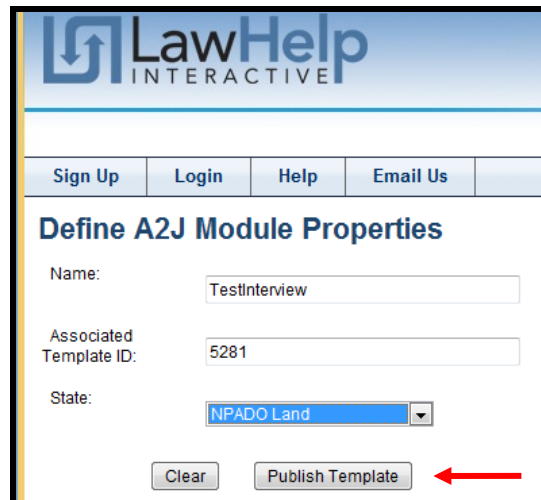


Figure 196: Define A2J Module Properties portal on LHI server.

- f. After you click “Publish Template” a new web page displaying a Temporary module ID (e.g., “Temp_A2J_3647”) will be displayed as shown in **Error! Reference source not found.**Figure 197 below. **IMPORTANT → Record the Temporary module ID number.** The Temporary module ID is needed for activation.

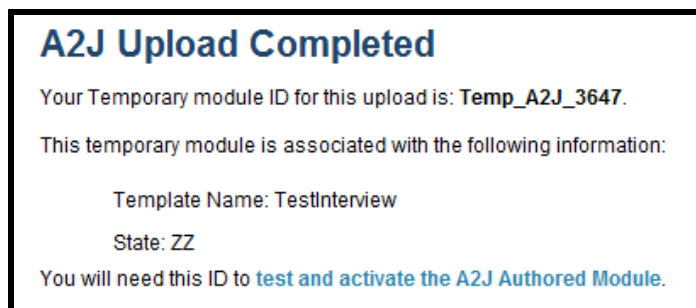


Figure 197: Temporary IDs for A2J Guided Interviews® should be recorded.

- (4) **Activation:** After you have recorded the Temporary module ID you will be ready to “Activate” the A2J Guided Interview on the national server.
- a. Click on the “test and activate the A2J Authored Module” link on the page displayed above.
 - b. The “test and activate” link will prompt you to Log In to LawHelp Interactive (see Figure 198).

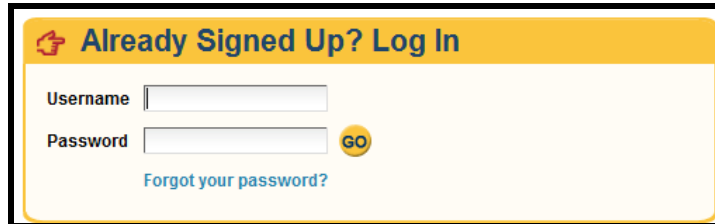
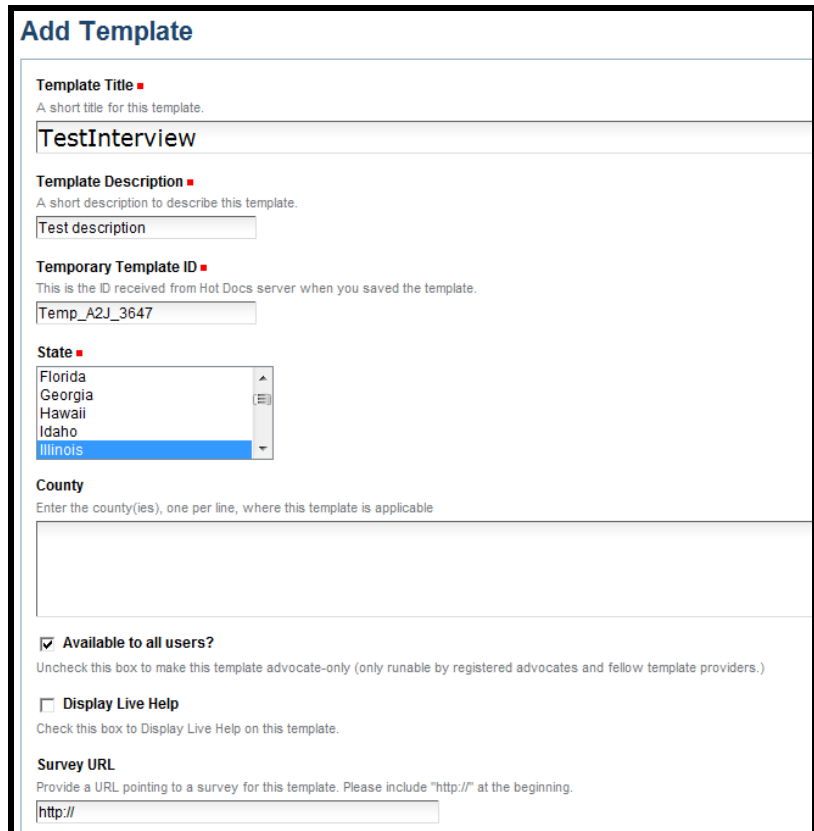


Figure 198: Log-In screen.

- c. Log in with your username and password, and navigate to the **Manage Content** page.
- d. Select the “template” option from the “add item” drop-down menu -- the same link that you would use to activate a HotDocs® template.
- e. Fill in the add template page as shown in Figure 199 below.
 - i. **Template Title:** Title of the A2J Guided Interview.
 - ii. **Template Description:** Enter a description. This description will populate the LawHelp Interactive screen that launches the interview and will be visible to all users of the interview.
 - iii. **Temporary Template ID** – type in the Temporary module ID that you recorded earlier EXACTLY as it was displayed when you uploaded the interview.
 - iv. **State:** Select the state the interview will be used in.
 - v. **County:** Enter the counties that this interview is suited for.
 - vi. **Available to all users?** Select whether the interview should be made available to all users.
 - vii. **Display LiveHelp:** If your program uses LiveHelp and you would like to enable LiveHelp for the interview, then check the LiveHelp box.

- viii. **Survey URL:** If you have designed a survey to be used by the end-user in conjunction with the interview, enter the URL for the survey in the designated field.



Add Template

Template Title ■
A short title for this template.
TestInterview

Template Description ■
A short description to describe this template.
Test description

Temporary Template ID ■
This is the ID received from Hot Docs server when you saved the template.
Temp_A2J_3647

State ■
Florida
Georgia
Hawaii
Idaho
Illinois

County
Enter the county(ies), one per line, where this template is applicable

Available to all users?
Uncheck this box to make this template advocate-only (only runnable by registered advocates and fellow template providers.)

Display Live Help
Check this box to Display Live Help on this template.

Survey URL
Provide a URL pointing to a survey for this template. Please include "http://" at the beginning.
http://

Figure 199: Add Template screen.

- ix. Select the “Add Topic” button (see Figure 200).

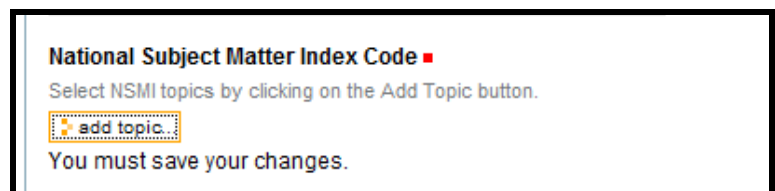


Figure 200: National Subject Matter Index Code "Add Topic" button.

- x. Complete the National Subject Matter Index Code and save your changes as shown above in Figure 186, Figure 187, and Figure 188.
- f. Once you have clicked on the “Save” button all that remains is to click the “**activate module**” link as shown in Figure 201.

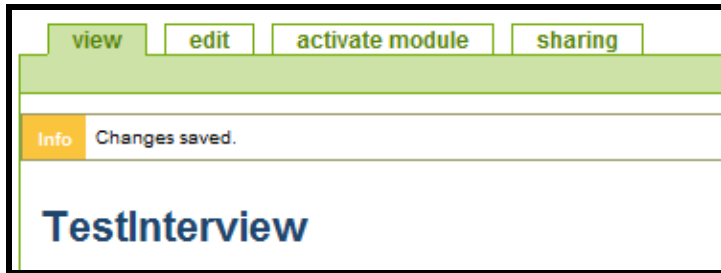


Figure 201: Activate Module link should be selected after you save the template data.

- g. When the “activate module” link is clicked, the URL address for your A2J Guided Interview should be returned.



Figure 202: Module Activation returns URL for A2J Guided Interview.

- (5) **Test:** Paste the URL link provided into a new browser window and test it. Verify that document assembly functions properly at the end of the interview.
- (6) **Managing the Uploaded Interview:** The A2J Guided Interview will be displayed along with your other templates in the Manage Content page on the LHI server. To reveal the link again, simply log-in to the server, go to the Manage Content area, select the interview and select “Show URL” (see Figure 203).



Figure 203: Show URL button reveals URL for an uploaded A2J Guided Interview.

UPLOAD A2J GUIDED INTERVIEWS®
TO LAWHELP INTERACTIVE

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Testing A2J Guided Interviews® with HotDocs®

This chapter will demonstrate how to test A2J Guided Interviews® with corresponding HotDocs® templates. Conducting such a test allows you to determine the following:

1. that your A2J Guided Interviews® are collecting all of the necessary HotDocs® template variables; and,
2. that the variables collected by your A2J Guided Interviews® will properly populate the HotDocs® template.

Please note that it is not necessary to upload A2J Guided Interviews® to the LawHelp Interactive (“LHI”) server in order to test the interview -- the testing process can be completed on your local PC. However, it is also important to upload a final interview to the LHI server and test it over the web before publishing the interview’s link on your website.

Introduction to Testing

In order to test A2J Guided Interviews®, you must assemble the HotDocs® template with an A2J Author®-created answer file. An A2J Author®-created answer file is created by answering interview questions and then saving the answer variables while in A2J Author® Preview Mode.

Creating an Answer File

The first step in the testing process is to create an “Answer file.” An answer file contains all the answers to the questions asked during the A2J Guided Interview. An Answer file can be created by opening the A2J Guided Interview that you want to test, and entering the Preview mode (Figure 204 below and the “Preview Mode” chapter).

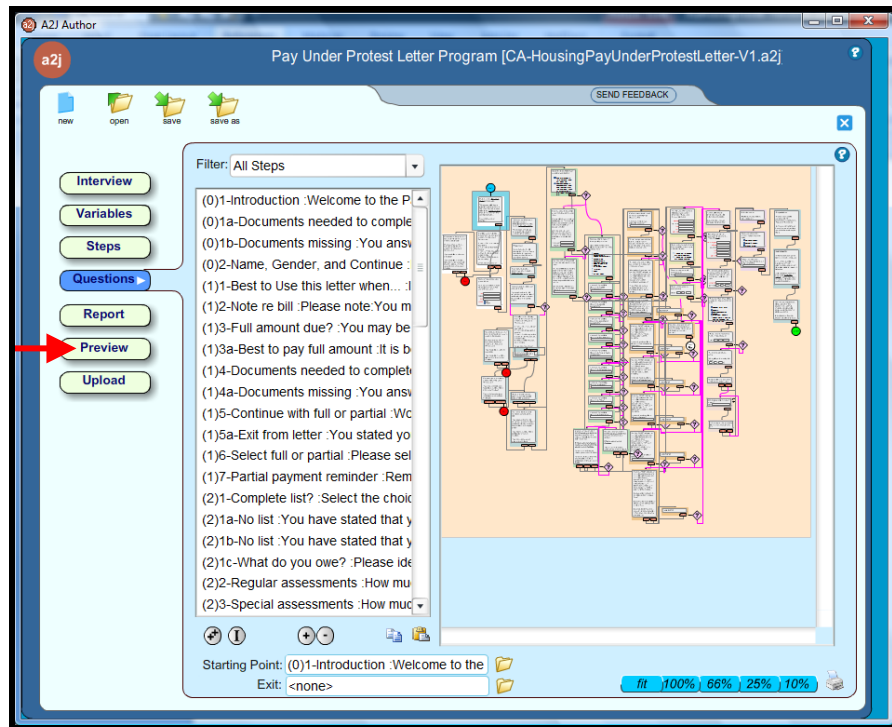


Figure 204: Preview Tab on the main menu.

When you enter Preview Mode, make sure you are starting from the beginning of the interview. Next, open your Interview Variables Window (Figure 205) by pressing the “Variables” button on the Preview Mode Toolbox (Figure 206).

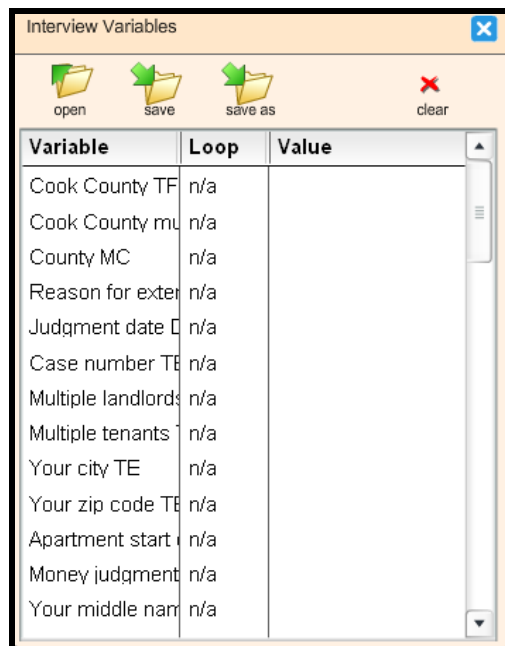


Figure 205: Interview Variables window

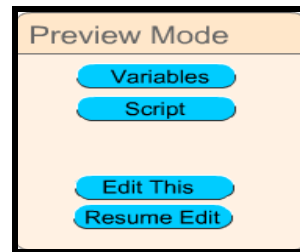


Figure 206: Preview Mode Toolbox

Next, Step through the entire interview making sure that you have answered all the questions in the interview. Once you have completed answering the questions in your interview, save your answers by clicking the “save” icon on the Interview Variables window (Figure 205).



If you plan on performing multiple tests, save your answer file using a convention that will be easy to track, e.g., Testanswerfile01.anx, Feewaiver-testanswer02.anx, etc.

Test Assembling a Template

In order to test assemble a document you must now open your saved document template in HotDocs®. Open HotDocs®, right click on a current library, and select “add item” (see Figure 207).

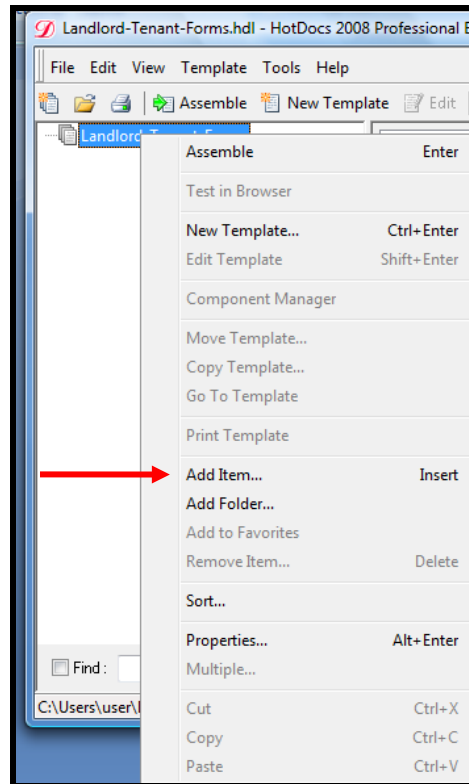


Figure 207: Adding a HotDocs® Template to a current Library

Next, select the appropriate template type from the drop down list. Then, click the browse icon and navigate to the folder where your HotDocs® template is stored (Figure 208).

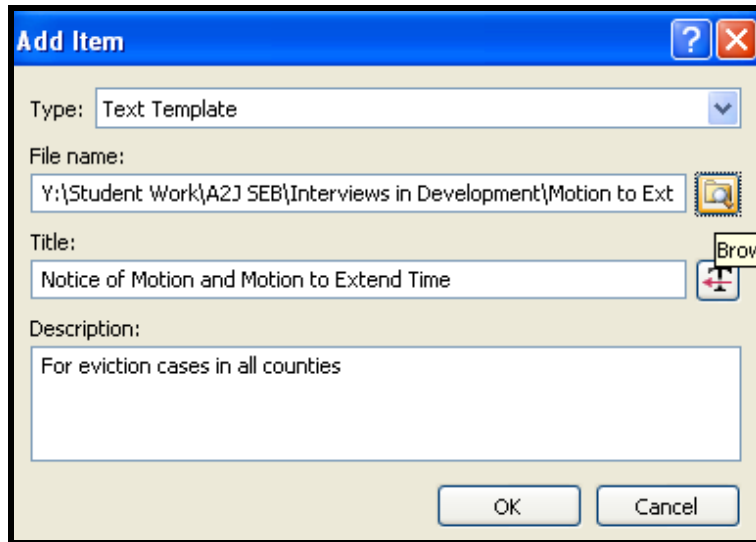


Figure 208: Browsing for your HotDocs® Template

Next, highlight the HotDocs® template that you want to test. Select “Assemble” from the menu bar. The “Answer File” dialog box will appear (Figure 209).

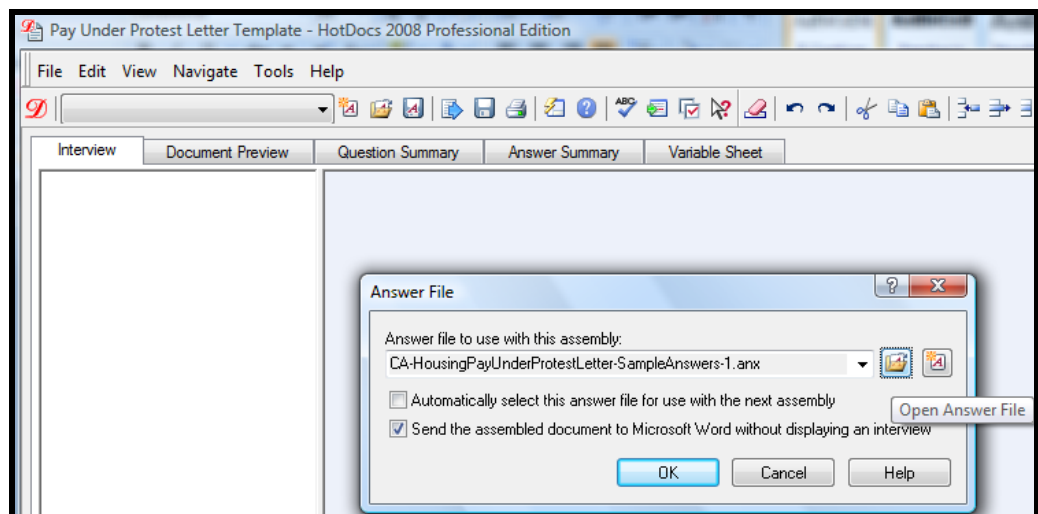


Figure 209: Answer File Dialog

Next, select the “Open Answer File” icon. The “Open Answer File Name” dialog will appear. Navigate to the folder where your answer file for your A2J Guided Interview is stored. (An answer file has the “.anx” file extension.) Select or highlight the file name and then click “Open” (Figure 210).

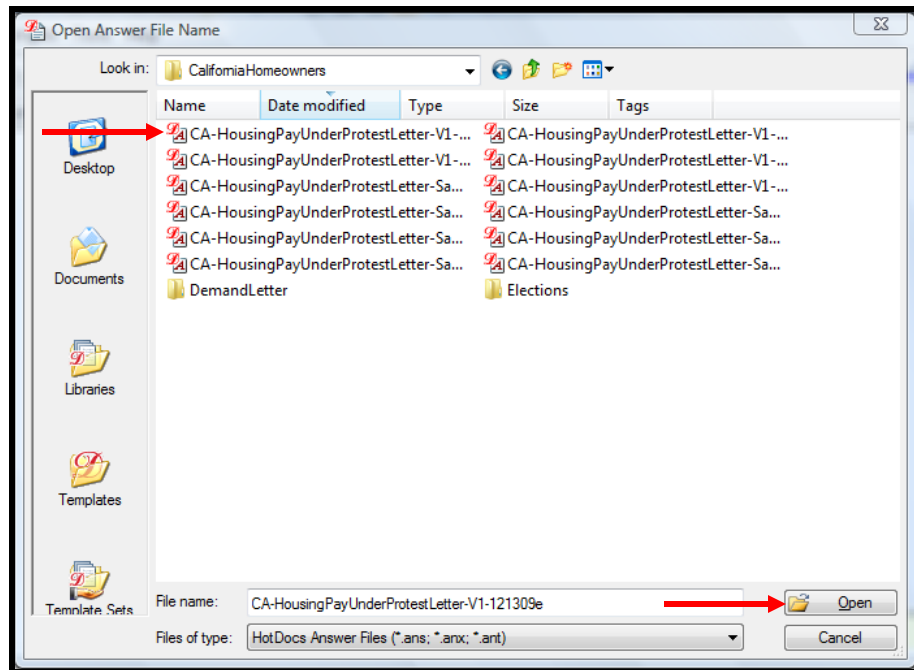


Figure 210: Open Answer File Name Dialog Box

Once you have selected the appropriate answer file, you will see the name of that answer file populate the “Answer File” dialog box (Figure 211). Check the “Send the assembled document to Microsoft Word without displaying an interview” check box, and click “OK.”

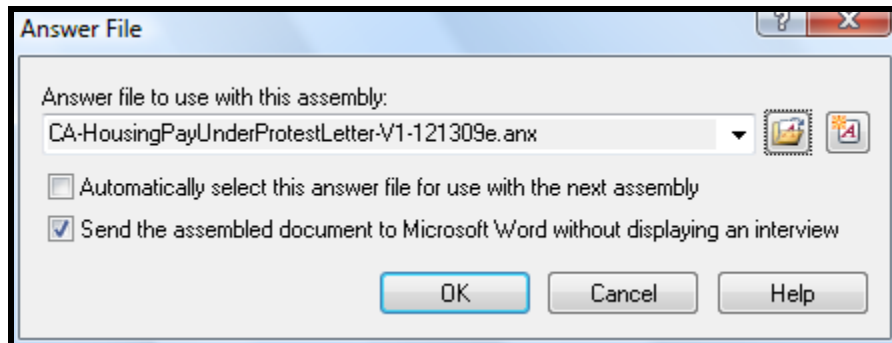


Figure 211: Answer File Dialog Box

The assembled document should open in Microsoft Word. Search the template to make sure all the variables that you entered in the A2J Guided Interview are showing up in the assembled document. If you see any words with “<<>>” around them, this likely means that a variable in your A2J answer file (.anx) did not match up with a variable on your HotDocs® template. Make sure that the variables are *named* exactly the same, and that the variable *types* are the same in your A2J Guided Interview as they are in the corresponding HotDocs template. Once corrections are made, try to reassemble the document.

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Chapter
12

Adding Audio

“Welcome to the Interview” – Avatar Guide

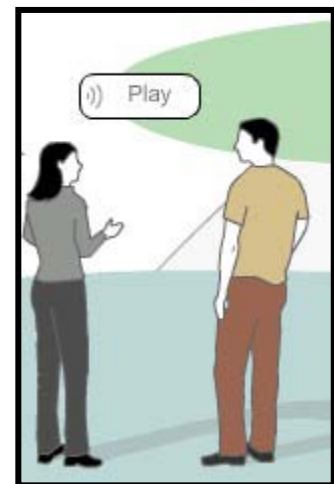
Audio can be very helpful to many end-users, so we encourage you to include the audio feature within your A2J Guided Interviews®. A2J Author® allows you to attach audio to each question, to each question help bubble, and also to pop-up bubbles. A2J Author® uses audio files in MP3 format. While many software choices for recording MP3s are available, this chapter describes the method for (1) recording, (2) editing, (3) creating, and (4) attaching MP3 files to A2J Guided Interviews® using the software Audacity.

Recording the audio for A2J Guided Interviews®

Many different software products can be used to record audio, edit, and convert it to MP3 format. This manual describes how to use Audacity. Audacity is free, open source software for recording and editing sounds. It is available for Mac OS X, Microsoft Windows, GNU/Linux, and other operating systems.

Setting Up and Configuring Audacity

- (1) In order to properly run Audacity make sure that the computer you are using has the following:
 - a. Sound card
 - e. Microphone jack & microphone (you’ll need to plug in a microphone to record the audio)
 - f. At least 2 GB of hard drive space
- (2) Download and install the Audacity application from: <http://audacity.sourceforge.net/>
- (3) Next, before using the Audacity application, you need to download an “MP3 encoder.” Because of software patents, Audacity cannot distribute



MP3 encoding software within the application. The MP3 encoder is what allows Audacity to record directly to MP3 file formats.

- a. The most common *free* MP3 encoder is called LAME. Follow these steps to download and install the LAME MP3 encoder:
 - iii. Download LAME by clicking on the following link: <http://rarewares.poskolio.com/lame3.97a10.zip>
 - iv. The file that you downloaded is a ZIP file which means it's compressed. Use a utility like WinZip to extract the zip file.
 - v. Unzip or extract the zip file to the directory where Audacity was installed (Figure 212).
 1. For example: C:\Program Files\Audacity\

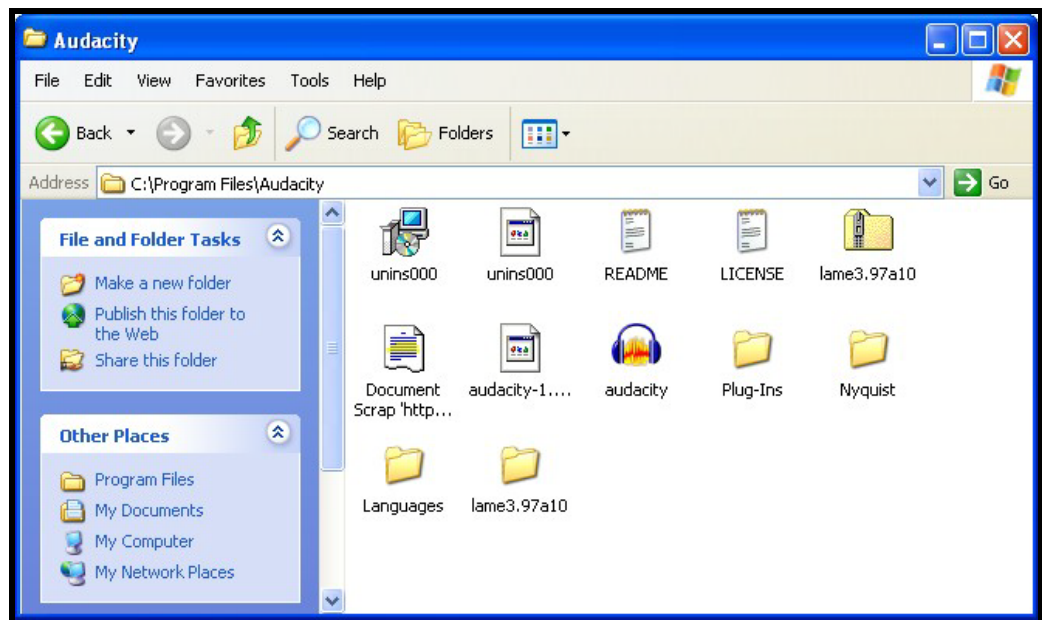


Figure 212: After extracting zip file the Audacity folder should contain a folder containing the LAME files.

- (4) Now launch the Audacity application.
- (5) To configure Audacity to use the MP3 encoder, follow these steps:
 - a. Click Edit Menu → Preferences...
 - i. In the Audacity Preferences dialog box, click on the third tab that says “File Formats” (Figure 213).

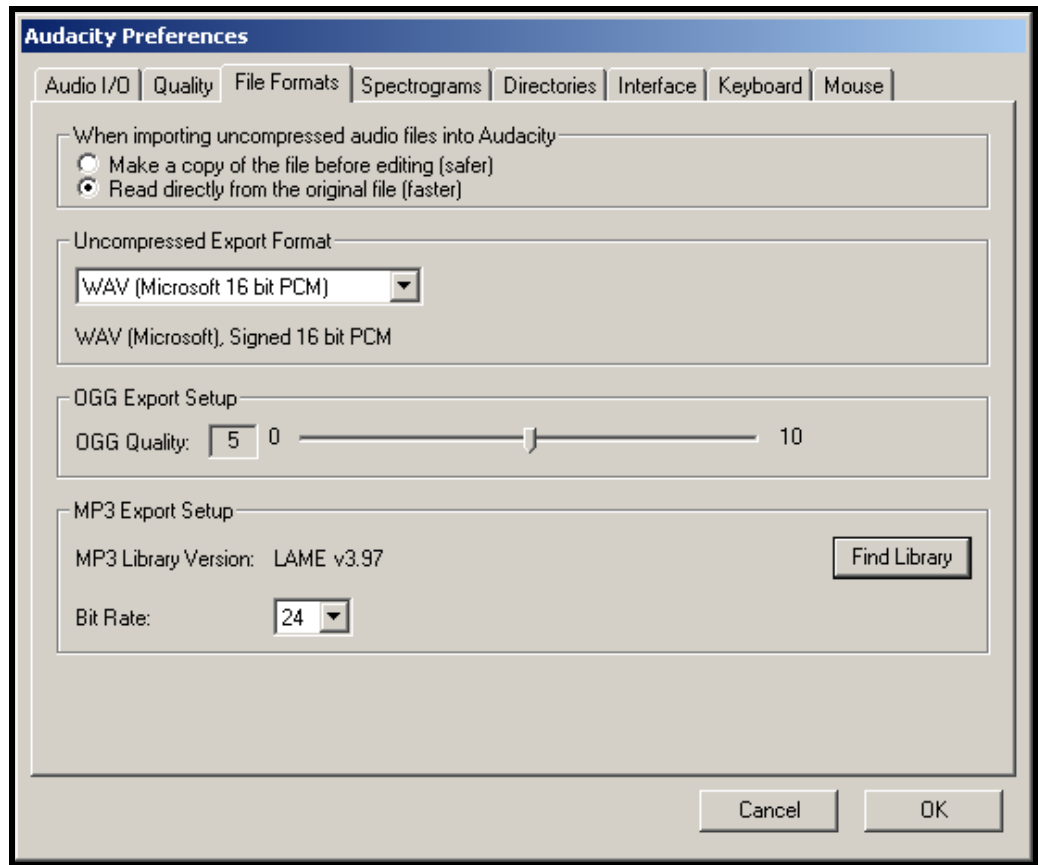


Figure 213: Edit Menu → Preferences → File Formats

- ii. Now click on the button that says “Find Library” and browse to the location where you extracted the LAME files.
 1. Select **“lame_enc.dll”**
- iii. Now select a Bit Rate of 24 as shown in Figure 213 above.
 1. If you’ve done it correctly, the MP3 Export Setup section will look like Figure 213 above.
- iv. Now, while you still have the Audacity Preferences dialog box open, select the second tab that says “Quality”
 1. Set the Default Sample Rate to **11025 Hz**. Leave all other settings (see Figure 214 below).

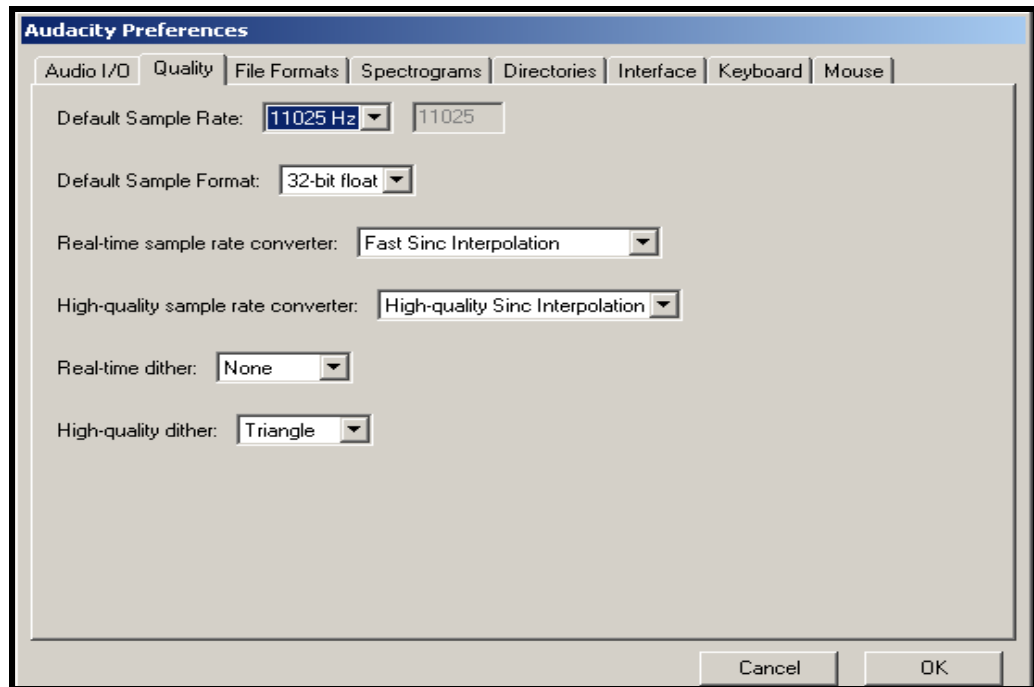


Figure 214: Edit Menu → Preferences → Quality

- (6) Click OK to exit back to the main Audacity program

Testing the Recording Setup

- (1) Plug your microphone into the computer.
 - a. Make sure that the microphone is selected as the input device (see Figure 215 below.)

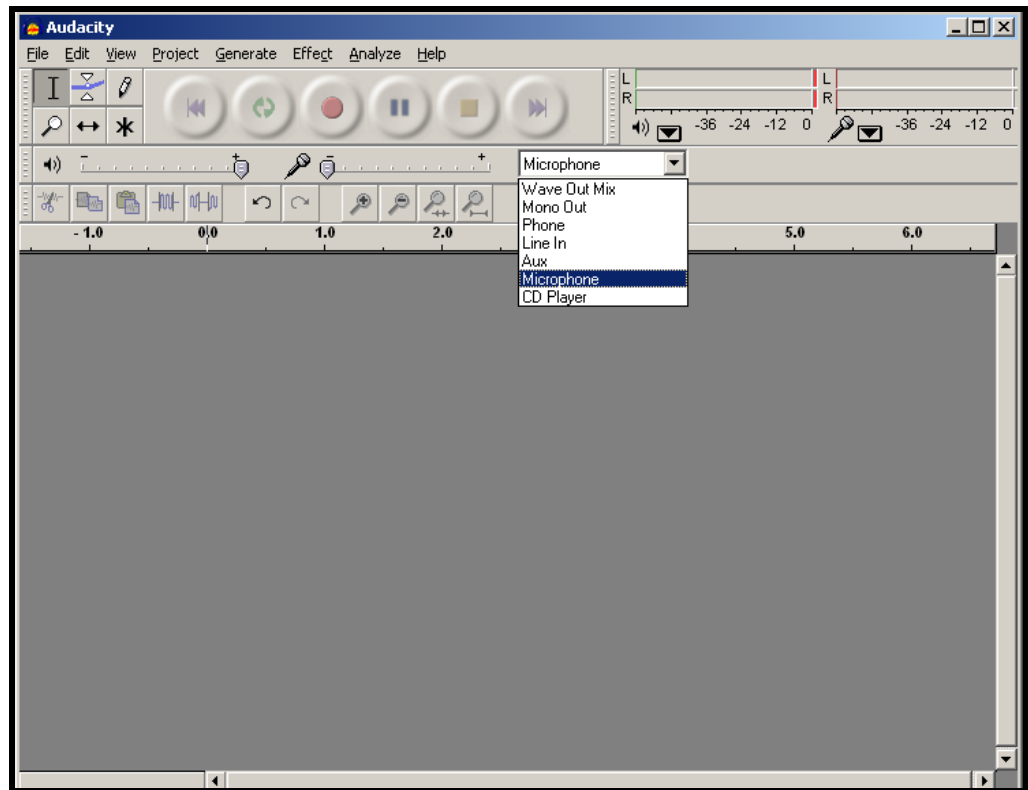
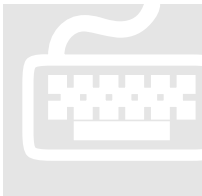


Figure 215: Select microphone for input device. Interface includes a “Record” button (red circle) and a “Stop” button (yellow square).

- (2) Test by clicking on the “Record” button (red circle).
- (3) Say a few words; then click “Stop” (yellow square).
- (4) Click play to make sure that you can hear what was just said.

Recording Audio

- (1) In A2J Author[®] click on the Report button in the main menu of A2J Author[®] and then press the “Create Script” button. This will produce a script of the text of each Question, Question Help, and Pop-up. So, printing this out will give you a script of everything that needs to be recorded. (See the “Reports Tab” chapter for more about producing reports in A2J Author[®].)



It is also recommended that you copy ([CTRL]+[A], [CTRL]+[C]) and paste ([CTRL]+[V]) the script into a Word Document so that you can save the script. Pasting the script into a Word Document will also allow you to spell check the text of the interview.

ADDING AUDIO

- (2) Select Record.
- (3) Read the entire script of your interview while recording.
- (4) Do not worry about making mistakes during the recording. If you make a mistake while reading a particular question's text, simply restate the text for that question.
- (5) This recording will function as the Master Audio Recording, which you will later edit into separate files in the next step.

Editing and Exporting Audio Clips

You should have finished recording the entire script for your A2J Guided Interview. In this step, you will edit the master recording to produce several audio files – breaking the master up into the audio for each individual question.

Edit Audio / Create Clips

- (1) You should have one long master audio recording. Audacity will look something like this (Figure 216):

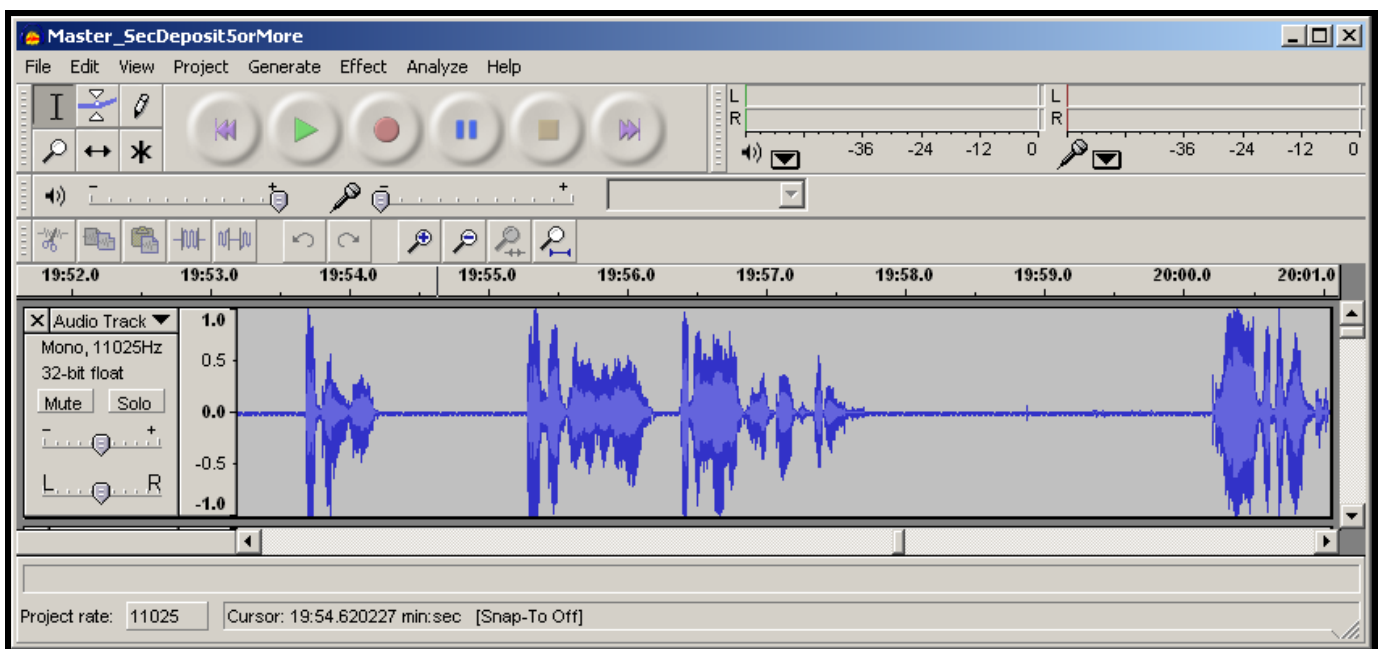


Figure 216: Master Audio Recording will have audio for every Question, Question Help, Pop-up, and Prompt.

- (2) Remember to save your work in audacity.

(3) **Now listen to the recording**

- a. With a copy of the audio script in hand press play (green triangle) to start listening to your recorded audio.
- b. When a complete item has been read, press stop and highlight the audio that corresponds to a single portion of the script.
- c. Press [CTRL]+ [D] to create a copy of the selected audio.
- d. Scroll down to the bottom of the audacity window and find the audio clip that you just copied.
- e. Left click on the “Audio Track” which is on the left hand side of your track and select “Name...” (see Figure 217 below.)

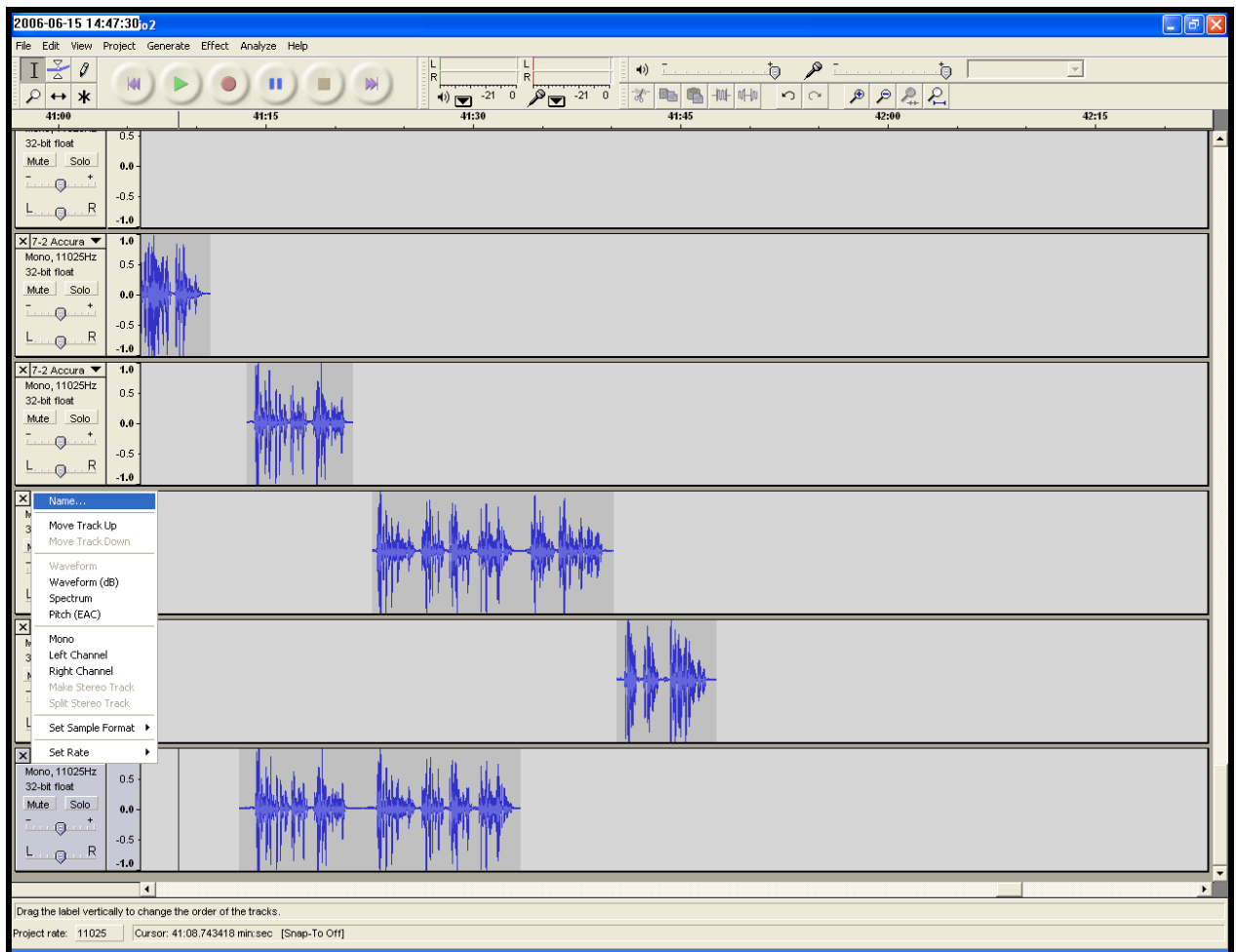
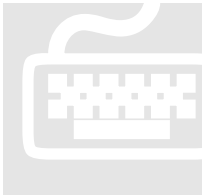


Figure 217: Create audio clips from the master audio recording by using [CTRL]+[D]; then be sure to name each clip.

- (4) Enter a name which corresponds to this audio clip. This name will be the audio clip’s filename when the track is exported.



The most efficient way to name each audio clip is to use the question number. Each question’s number is reflected in the script (Figure 218). By using the question number it will be easier to attach audio clips to the corresponding questions in the interview. Listed below is a suggested convention for naming audio clips.

0: 3-Gender
Choose your gender.

0: 3-Gender.help
here is a help question

here is the answer to the help [question](#)

Hypertext	Popup text
question	here is the text of a pop-up

Field	Prompt
Gender: (gender)	I need more information. You must choose either male or female from the highlighted

Figure 218: Sample Script of Question 3 under Step 0 of an A2J Guided Interview.

Text Type	Suggested File Name Convention
Question	[step #] + [question #] + [question name], e.g., 0-3-Gender.mp3
Question Help	[step #] + [question #] + “H”, e.g., 0-3-h.mp3
Pop-Ups	[step #] + [question #] + “PU” + [hypertext word], e.g., 0-3-pu-question.mp3
Prompts	[step #] + [question #] + “P” + [field name] e.g., 0-3-p-gender.mp3

- (5) Press play to continue.
- (6) Repeat this process until you have audio clips for the entire interview. Remember to save often to avoid losing your work.

Export the audio clips

- (1) In the directory where you created your A2J Guided Interview create a folder called “MP3”.
- (2) In the “File” menu of the Audacity program, select “Export Multiple...”
- (3) Select MP3 as the “Export format” (Figure 219).
 - a. Press the “Choose...” button and navigate to the MP3 folder that you created in your interview’s folder.

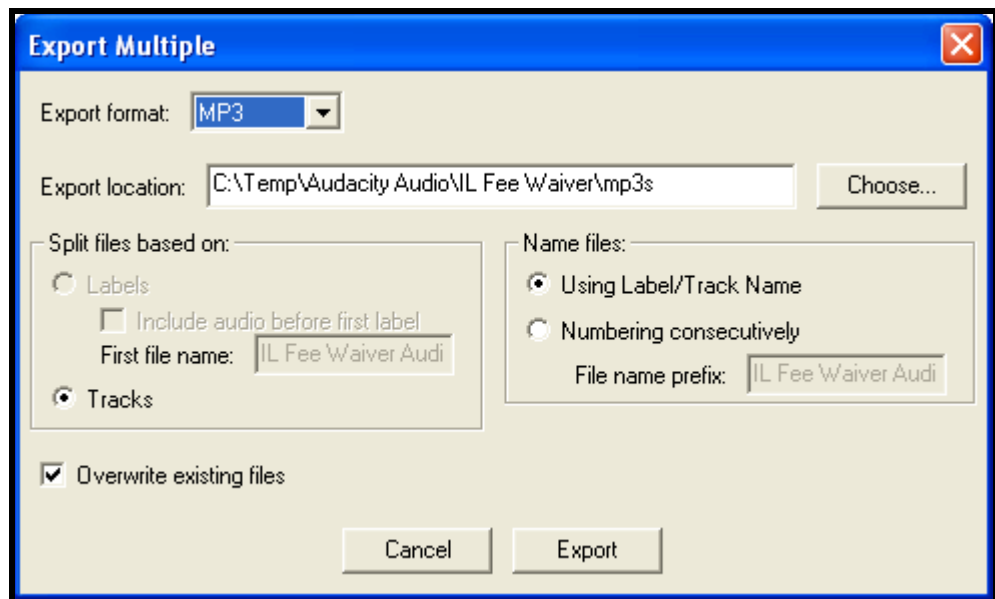


Figure 219: Export Multiple interface in Audacity.

- (4) Press “Export” and then “OK.”
- (5) When audacity is finished exporting your MP3s, you will have one MP3 file for each track.

Attaching Audio to A2J Guided Interviews®

- (1) Open your A2J Guided Interview.
- (2) In each question add audio to the question's text and any Question Help, Pop-up, or Prompt text for each Question (Figure 220, Figure 221, and Figure 222).
- (3) To attach a file, click on the folder above the Question's, Question Help's, Pop-Up's, or Prompt's text.

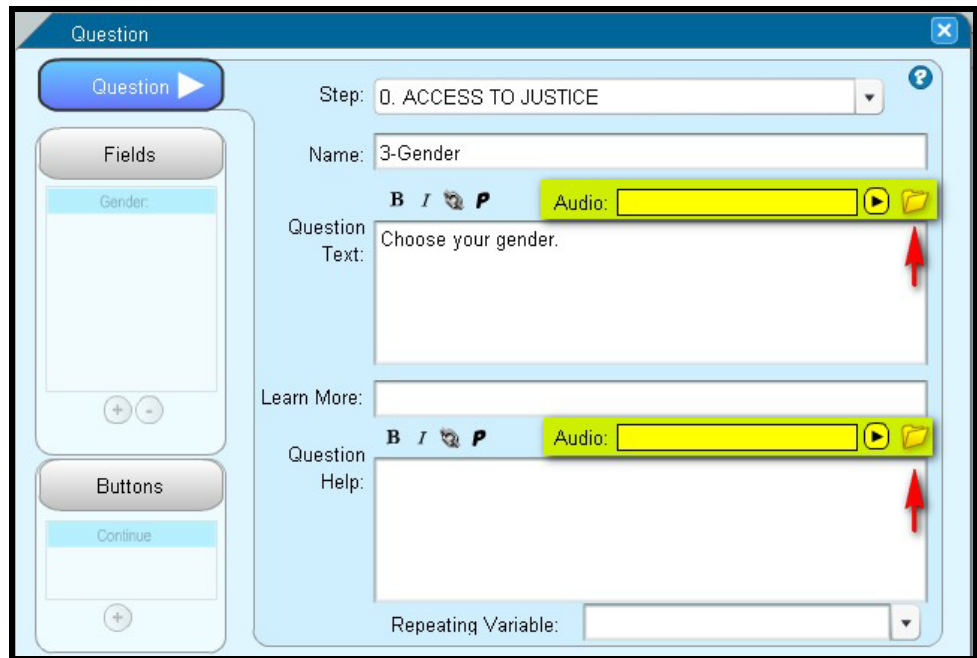


Figure 220: The Question Design Window provides an Audio attachment field for both the Question and the Question Help. Simply browse for the MP3 file by selecting the yellow folder icon.

ADDING AUDIO

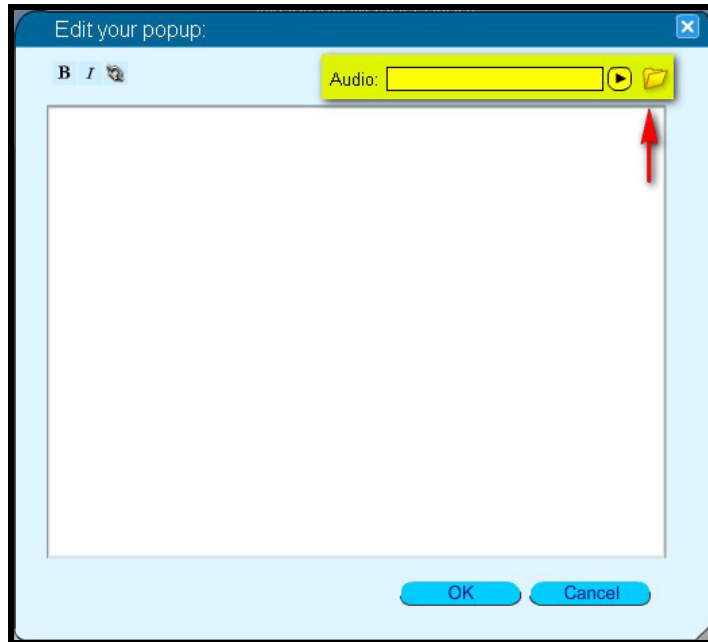


Figure 221: The Pop-Up Editing Window provides an Audio attachment field. Select the yellow folder icon to browse for the MP3 file.

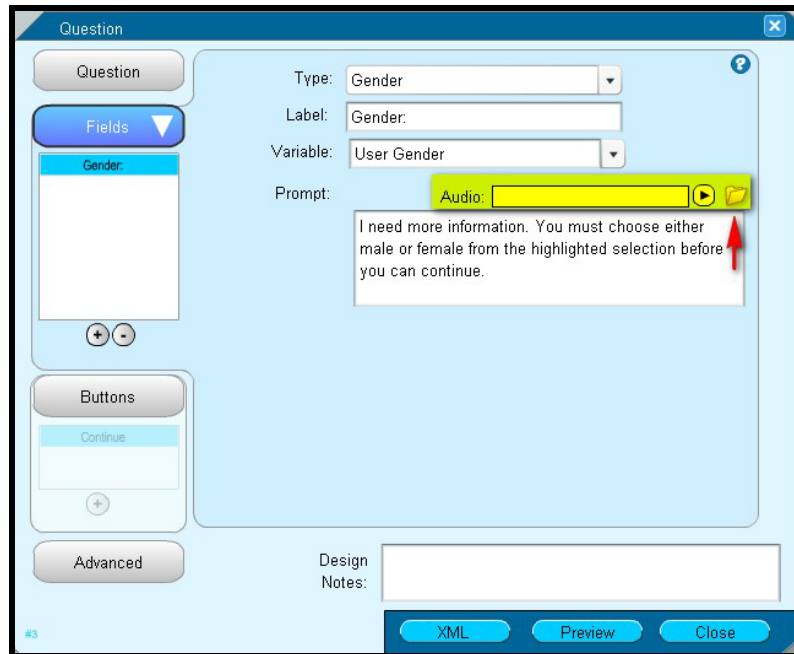



Figure 222: Each Field provides an Audio attachment field.

- (4) You can test an MP3 file once it is attached by pressing “Play”  in the Preview Mode (see chapter entitled “Preview Mode”).
- (5) Continue adding MP3 files to all of your questions.

Presentation of Audio to the End-User

- (1) If audio is included in the interview, then the audio clips will automatically play once the end-user launches the interview.
- (2) To stop an audio clip, the end-user can select the “Stop” button located to the right of the question bubble (Figure 223). Conversely, the end-user may select “Play” to replay the audio for a particular screen. (The “Stop” button toggles to “Play” once selected and vice versa.)
- (3) The end-user also has the option of deselecting audio altogether by pressing the Sound On/Off button in the main menu (Figure 223). By turning off the sound entirely, they will not have to select “Stop” at every question.
- (4) The end-user may also pause and rewind the audio as well as adjust the volume from the audio control box.
 - a. Note: The Sound On/Off button and audio control box will not appear in an interview that is not equipped with audio.



Figure 223: Sound On/Off button and Stop button for audio.



APPENDIX A: Software Documentation

Find out what's new about the latest version of A2J Author®.

In this appendix we have provided a history of the revisions to the software. If you have not recently updated your A2J Author® software, this appendix can function as a quick means of determining what is new and different about the latest version. We have identified whether each revision item is either, a bug which has been “Fixed”, or a feature that has been “Added,” “Changed,” or “Removed.” Dates of the Official Releases of the software have also been identified for your reference. The revision history also serves as a quick index to additional documentation, including explanations, tutorials, or diagrams, located elsewhere within this Authoring Guide regarding the more recently developed features. Please also visit the Download page on www.a2jauthor.org to find a brief description of all of the new features in 3.0.

A2J AUTHOR® REVISION HISTORY	
	REVISIONS FOR 1.1.3 (2006-05-07) (INTERNAL)
Added.	You may set variable 'User Avatar' to 'blank' or 'tan'. Setting to "" is treated like setting to 'blank'.
Added.	Phone number now displays like this: (###) ###-####. If existing phone number includes an extension it's added to the end of the third part of the number.
Changed.	Can now open more than one A2J Author® window at the same time.
Changed.	Hyperlinks in A2J are currently an orange-red color. This modification will make any hyperlink appearing in A2J the standard blue color used on regular web pages. Text that is a Pop-Up will remain the same orange-red color.
Fixed.	URL length limitation.
Fixed.	Ability to hyperlink to https sites. Removed http:// from url box. It's now added automatically if another protocol such as https is not specified. So one can enter: www.cali.org, http://www.cali.org or https://www.cali.org.
Added.	Avatar Options.
Fixed.	Hyperlink character limit.
Added.	Multiple A2J Author® windows - open two A2J Author® windows at the same time.
	REVISIONS FOR 1.1.4 (2006-05-11)
Added.	Multi-language support.
	REVISIONS FOR 1.1.6 (2006-08-17) (INTERNAL)
Fixed.	Buttons bigger to support Spanish word length.
Fixed.	User Avatar can be set within scripts.
Added.	User Gender can be set from scripts.
Fixed.	Buttons are sized to their captions.
Fixed.	Users can enter month names.
Added.	Date defaults to mm/dd/yyyy format.
Fixed.	Author prompted to save changes upon exit.

Removed.	'Scope' of variables is obsolete. Authors use naming conventions instead.
Fixed.	Blank notes field no longer shows 'undefined'.
Fixed.	Hyperlinks are blue and underlined.
Fixed.	Apostrophe bug - ' would appear in Reports instead of '.
Added.	Popup text now displayed within the question text in Reports.
Fixed.	Unused learn more and help fields are skipped in Reports.
<i>Official Release</i>	REVISIONS FOR 1.5 (2007-01-22)
	REVISIONS FOR 1.6.1 (2007-08-10) (INTERNAL)
Fixed.	Support uppercase AND/OR in Advanced scripts.
Fixed.	Removed extraneous 'and' when printing repeat variables.
Fixed.	Age function returns correct age (taking leap year into account).
Fixed.	Sorting of steps ≥ 10 in question list.
Fixed.	Gender is now optional.
Added.	URL in Exit links no longer requires 'http://'.
Fixed.	Counter variable wording.
Changed.	Sample variable names standardized.
Fixed.	Only Text type repeating answer variables were loaded from answer file.
	REVISIONS FOR 1.7 (2007-11-15) (INTERNAL)
Fixed.	Gender variable bug fixed.
Added.	10% zoom for flowchart.
Added.	INTEGER, INTEGER2, ROUND, ROUND2 functions.
Added.	Sound On/Off button active only when audio present.
Added.	Can set sign post text through variables (text set under Advanced Tab).
Fixed.	Space between styled text no longer disappears.

Changed.	New question gets named with next higher number.
Fixed.	Renamed windows and standardized wording.
	REVISIONS FOR 1.7.5 (2007-11-19) (INTERNAL)
Added.	Set multiple variables or actions in condition. Note: This feature includes a simple true/false toggle which implements non-nested if/else. *When loading older interviews A2J always creates an entry for 'true'. *The new format of the XML won't be applied until an interview is saved. *The scripting tracer is fixed to work with it. Report mode is also updated. *The Question dialog is a bit taller to support the new sublist – other tab layouts have yet to be optimized.
	REVISIONS FOR 1.7.6 (2007-11-26) (INTERNAL)
Fixed.	Include URLs in FULL REPORT.
Added.	Clear All Audio Button now on the Report tab.
Added.	Add question vs insert question. Press + adds new question unconnected. Press I to insert new question after current selected question. Press ++ to exactly clone question.
Changed.	Remove 15 command limit under advanced tab. Upped to 50 for condition and statements.
	REVISIONS FOR 1.7.7 (2007-11-28) (INTERNAL)
Added.	Use variable to set text in Radio Button or Multiple Choice Label. You can use macro notation inside a label. Undefined values cause some “ickiness” in display – still needs to be addressed. Eliminating <FONT tag may be sufficient.
Changed.	Automatic placement of labels if too wide.
Added.	Reorder date list in date field option.
Fixed.	Continue button locked. Hard to pin down – appears to be fixed.
	REVISIONS FOR 1.8 (2008-01-14) (INTERNAL)
Added.	Custom ending graphic.
Fixed.	Sorting names handles mixed numbers and text.
Fixed.	INTEGER function replaced with TRUNC.
Added.	Number and Text lists can be sorted.

SOFTWARE DOCUMENTATION

Fixed.	Clear All Audio Button moved to Upload Tab.
Fixed.	Default conditions are now blank.
	REVISIONS FOR 2008-01-15 1.8.1 (INTERNAL)
Fixed	Script tracer clarified.
Fixed.	Repeating answers load properly.
	REVISIONS FOR 2008-01-16 1.8.2 (INTERNAL)
Fixed.	Default User variable names.
Added.	'True/False and 'true'/'false' are now equivalent.
	REVISIONS FOR 2008-01-18 1.8.3 (INTERNAL)
Fixed.	List selection problem.
Added.	Server test option.
Fixed.	Potential upload naming issue.
	REVISIONS FOR 2008-01-20 1.8.4 (INTERNAL)
Added.	Double-click to edit variable's question.
Fixed.	Question names >10 properly numbered.
	REVISIONS FOR 2008-01-28 1.8.6 (INTERNAL)
Added.	'Edit This' button.
Fixed.	Clear audio now refreshes upload list.
Fixed.	Importing HotDocs [®] variables updates pickers.
Fixed.	Answer files now have proper 'blank' setting.
	REVISIONS FOR 2.0 (2008-02-21) (INTERNAL)
Added.	Version 2.0.0.
	REVISIONS FOR 2008-03-10 2.0.1 (INTERNAL)
Fixed.	Path to courthouse on server.
	REVISIONS FOR 2008-03-31 2.0.2 (INTERNAL)

Fixed.	Space issue.
Fixed.	Removed debug buttons from viewer.
<i>Official Release</i>	REVISIONS FOR 2.0.2 (2008-04-01)
	REVISIONS FOR 2.5.0 (2008-09-29) (INTERNAL)
Added.	Copy/Paste Question(s) Between Interviews.
Added.	Select and move multiple questions in flowchart.
Added.	Attach video .flv to help popups.
	REVISIONS FOR 2.6.0 (2008-10-27) (INTERNAL)
Added.	Setting variable "A2J Navigation TF" to false turns off Next/Back and History.
Removed.	Viewer Send Feedback button.
Added.	Clear Video button.
Fixed.	Changing field type 'list' to 'text' must erase the list reference.
Added.	Report options to suppress lists and routine prompts and filter steps.
	REVISIONS FOR 2.7.0 (2008-12-23) (INTERNAL)
Added.	Support for ShowMe pictures such as JPG, GIF and PNG.
Added.	Option to enlarge long text fields.
	REVISIONS FOR 2.7.1 (2009-02-06) (INTERNAL)
Fixed.	Large file uploads. Upload any number of files but no individual file >100MB.
	REVISIONS FOR 2.7.5 (2009-04-06) (INTERNAL)
Added.	Logo branding option.
Changed.	Reports use color only on Steps.
Fixed.	Smoother "Show Me" pictures.
	REVISIONS FOR 2.7.6 (2009-04-14) (INTERNAL)

SOFTWARE DOCUMENTATION

Added.	Clear Media button.
Added.	Zoom button captions.
Changed	"A2J Navigation TF" hides navigation buttons.
Changed.	Logo always visible.
	REVISIONS FOR 2.7.7 (2009-04-20) (INTERNAL)
Fixed.	Minor changes.
	REVISIONS FOR 2.9.0 (2009-05-06) (INTERNAL)
Added.	Text Reader tags for video/images.
Fixed.	Checkbox/radio button font size.
	REVISIONS FOR 3.0.0 (2009-06-15) (BETA RELEASE)
Fixed.	Report questions sorted.
	REVISIONS FOR 3.0.1 (2009-08-17) (INTERNAL)
Fixed.	Pasting questions now includes popup content.
Fixed.	Inserting a question hilites the new question.
Changed.	Debug bar toggle is now ctrl-shift click on A2J logo.
Changed.	Save&Exit is now Exit with author control.
Added.	Go back as a button branch option. (As if user pressed Back button.)
Added.	Exit with save incomplete data. Set A2J Interview Incomplete TF to true.
Added	Exit question picker on Question panel.
	REVISIONS FOR 3.0.2 (2009-08-24) (INTERNAL)
Changed.	Fonts are black.
Added.	'Resume' option after Exit.
	REVISIONS FOR 3.0.3 (2009-09-01) (INTERNAL)

SOFTWARE DOCUMENTATION

Added.	Answer saving progress indicator.
	REVISIONS FOR 3.0.4 (2009-11-03) (INTERNAL)
Added.	Upload Answers language prompt.
	REVISIONS FOR 3.0.5 (2009-11-04) (INTERNAL)
Added.	Timeout information for the server.
	REVISIONS FOR 3.0.6 (2009-11-11) (INTERNAL)
Fixed.	Video player volume bar.
Changed	Only multi-file upload active.
Added	Confirm maximum file sizes on upload.
	REVISIONS FOR 3.0.7 (2009-12-03) (INTERNAL)
Fixed.	Video player controls ghost.
<i>Official Release.</i>	REVISIONS FOR 3.0.8 (2010-01-19)
Fixed.	Spanish label cropping.
Changed.	Viewer is taller to support bigger checkbox font size and legacy interviews.
Removed.	Gray border if custom logo not specified.
	REVISIONS FOR 3.2.0 (2010-03-11)
Fixed.	Very tall questions in flowchart.
Added.	Calculator popup.
Added.	Calendar popup.
	REVISIONS FOR 3.2.1 (2010-3-18) (INTERNAL)
Added.	3 user font sizes.
Added.	Scrollbar for questions.
Added.	Audio controls.

SOFTWARE DOCUMENTATION

Changed.	Viewer is 930x660 (130 pixels wider).
	REVISIONS FOR 3.3.0 (2010-3-30) (INTERNAL)
Added.	Maximum characters per field.
	REVISIONS FOR 3.5.0 (2010-4-01) (INTERNAL)
Added.	Minor changes.
	REVISIONS FOR 3.5.1 (2010-4-13) (INTERNAL)
Added.	Minor changes.
	REVISIONS FOR 3.6.0 (2010-05-05) (INTERNAL)
Added.	Localized interviews (no network required).
	REVISIONS FOR 3.6.1 (2010-05-05) (INTERNAL)
Changed.	Clear media prompts.
	REVISIONS FOR 3.8.0 (2010-08-02) (INTERNAL)
Added.	Calendar optional.
Fixed.	Calendar date orders.
Changed.	Calendar defaults to today.
Added.	Increased authoring area.
Fixed.	Cloned popups with question copying.
Fixed.	Registration/settings.
	Revisions for 3.9.0 (2010-09-22) (internal)
Added.	Answer file import checks.
	Revisions for 3.9.1 (2010-11-18) (internal)
Added.	Double-click to open interview within A2J Author.
Added.	Option to save answer file as UTF-16, Base 64 encoded.

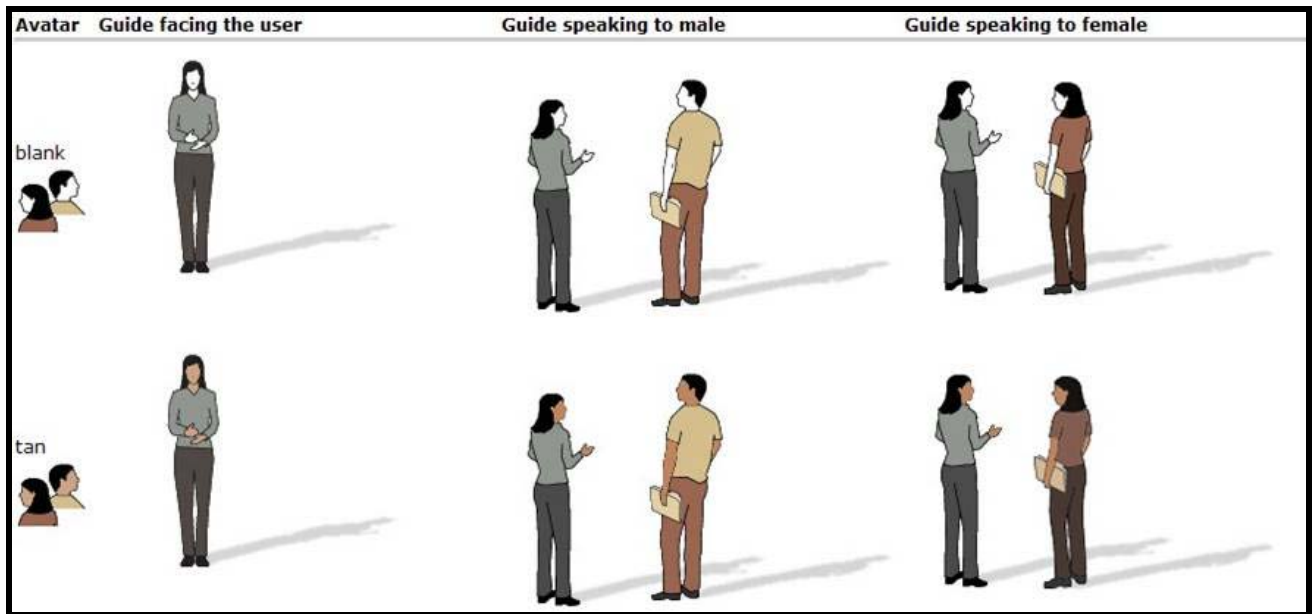
SOFTWARE DOCUMENTATION

<i>Official Release</i>	REVISIONS FOR 4.0.0 (2010-12-16)
-------------------------	----------------------------------

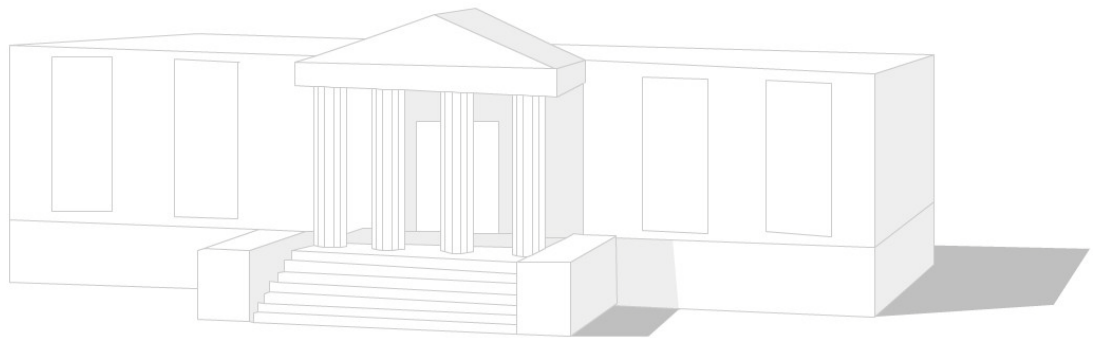
APPENDIX B: Images and Diagrams

This Appendix is intended to serve as a quick reference to the images used in both the online A2J Guided Interview™ interface and A2J Author® desktop software interface. You will find images for each type of Avatar that can be used in an interview and an image of the default end graphic. In addition, you will find a detailed diagram of each of the “Tabs” in A2J Author®: Interview, Variables, Steps, Questions, Reports, Preview, and Upload. Diagrams of certain pop-up windows are also provided, including the Variables Information window, and each of the Tabs in the Question Design window.

Avatars



End Graphic



Start-Up Screen

The screenshot shows the start-up screen of the Access To Justice Authoring System. At the top left is the 'a2j' logo. A callout box explains that the logo is dynamic and clicking it reveals version and authorship information. At the top right is a 'SEND FEEDBACK' button and a question mark icon. A callout explains that the question mark icon is used to access the Authoring Guide on the A2J Author Community Website (www.a2jauthor.org). The main heading reads 'Welcome to the Access To Justice Authoring System'. Below this is a woman icon with a speech bubble asking 'What would you like to do?'. Two main options are presented: 'Create a new interview' (with a blue document icon) and 'Open an existing interview' (with a yellow folder icon). A callout box explains that 'Create a new interview' starts a new interview with four starter questions, while 'Open an existing interview' allows browsing and opening a previously saved A2J Guided Interview. At the bottom, logos for Chicago-Kent College of Law (Illinois Institute of Technology), CALI, SJI State Justice Institute, and LSC are displayed. A footer contains a copyright notice: '© 2000-2007 Illinois Institute of Technology - Chicago-Kent College of Law and the Center for Computer-Assisted Legal Instruction'.

a2j

The A2J logo is dynamic.
Click on the icon to reveal the software's version number and authorship information.

We would love to hear from you.
Send us feedback on the software by clicking this icon.

SEND FEEDBACK

The "?" symbol appears on every A2J Author program screen.
Click on the icon to access the Authoring Guide on the A2J Author Community Website (www.a2jauthor.org)

Welcome to the Access To Justice Authoring System

What would you like to do?

Create a new interview

Open an existing interview

Select "Create a new interview" to start a new interview which includes four starter questions.

Select "Open an existing interview" to browse and open a previously saved A2J Guided Interview.

Chicago-Kent College of Law
ILLINOIS INSTITUTE OF TECHNOLOGY

CALI

Center for Access to the Courts Through Technology

SJI STATE JUSTICE INSTITUTE

LSC

Access to Justice Author was developed under grants from the State Justice Institute (SJI grant number SJI-04-N-121), Center for Access to the Courts through Technology, Chicago Kent College of Law, Center for Computer-Assisted Legal Instruction (CALI), and Legal Services Corporation (LSC). The points of view expressed are those of the authors and do not necessarily represent the official position or policies of the SJI, Center for Access to the Courts through Technology, Chicago-Kent, CALI, or the LSC.

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Interview Tab

The screenshot shows a web-based form titled "Pay Under Protest Letter Program" with a sub-tab "Interview". The form contains several input fields and sections:

- Title:** Pay Under Protest Letter Program
- Description:** This interview allows the end user to file a claim with the Homeowner's Association or related...
- Jurisdiction:** California
- Author:** A2J Author Consultant
- Feedback:** Allow 'Send Feedback'
- Mail to (optional):** [Empty field]
- Version:** 10/1/2009
- Language:** English
- Avatar:** blank
- Logo Graphic:** [File selection button]
- End Graphic:** [File selection button]
- History:** Interview created 8/20/2009
Draft 2 completed - 8/27/2009
Draft 3 completed - 9/13/2009
Question (1)3: text needs to be completed for...

Information fields: Title, Description, Jurisdiction, Author, Version, and History.
Note: The "Title" is *not* the same as the name of your file; however, the "title" will be reflected on all reports.

Other preference settings:
Language: Selecting English or Spanish will change the language of static labels/buttons in the online interface.
Avatar: Selecting blank or tan will change the color of the Guide and User Avatar.
Send Feedback: Check the box and enter an appropriate e-mail address to receive feedback from end-users.

Graphic preference settings:
Logo Graphic: Select a 120x120 pixel sized graphic to appear in the bottom right-hand corner of your interview.
End Graphic: Select your own graphic to customize the interview. If you do not select a graphic, the courthouse default graphic will appear.

Variables Tab

Sample Health Care Power of Attorney [Sample Healthcare Power of Attorney]

HotDocs Templates:

Variables:

Used	Name	Type	Repeat	Comment
1	Agent address line 1 TE	Text	F	
1	Agent last name TE	Text	F	
1	Agent middle name TE	Text	F	
1	Agent postal code TE	Text	F	
1	Agent state MC	Multiple Choice	F	
1	Agent telephone TE	Text	F	
1	Alternate agent address line 1 TE	Text	F	
1	Alternate agent address line 2 TE	Text	F	
1	Alternate agent city TE	Text	F	
1	Alternate agent county TE	Text	F	
1	Alternate agent first name TE	Text	F	

Load variables: Load variables from a HotDocs Component

Information about your HotDocs Template (does not affect the interview)

"Used" - shows how many times the variable is used in the interview

"Name" - the name of the variable (the variable collects the value of an answer entered in a field)

"Type" - Text True/False Multiple Choice Number etc.

"Repeat" - whether the variable is used in a repeat dialog

"Comment" - metadata about the variable

"Load variables" folder icon: allows you to import the variable names used in the corresponding HotDocs template

Variables Information Window

Provide information about your Interview's forms.

HotDocs Templates:

Variable Information

Name: Signed copy postal code TE

Type: Text

Repeat: Multiple values

Notes:

Used by: (5)1e-Signed Copies: Addre
(5)1b-Signed Copies: Addre

OK Cancel

"Name" - name of the variable

"Type" - make sure the type listed here matches with the type used in HotDocs template

"Repeat" - whether the variable was used in a repeat dialog (loop)

"Notes" - metadata about the variable

"Used by": Shows you which questions in the interview have used the variable.

1	User Gender	Text	F	User's gender will be used to disj
---	-------------	------	---	------------------------------------

Load variables: Load variables from a HotDocs Component

Steps Tab

Question steps: 5

Health Care Power of Attorney Interview

- 1 AGENT INFORMATION
- 2 LIMITATIONS
- 3 PHYSICIAN INFORMATION
- 4 INSTRUCTIONS FOR HEALTH CARE
- 5 CONCLUSION

Interview
Variables
Steps
Questions
Report
Preview
Upload

SEND FEEDBACK

new open save save as

To modify the language in a step 'Click' on the text.

"Question steps" - select the up or down arrows to add or take away

Each step is represented as a new road sign along the path to justice.

Steps should be used to break up questions into logical groups.

Questions Tab

The screenshot shows the 'Pay Under Protest Letter Program' interface. The 'Questions' tab is active, displaying a list of questions on the left and a flowchart on the right. The interface includes a sidebar with buttons for Interview, Variables, Steps, Questions, Report, Preview, and Upload. A filter dropdown is set to 'All Steps'. The question list shows items like '(3)9-F', '(3)9a', '(3)10', etc. The flowchart shows a complex network of question nodes connected by lines, with some nodes highlighted in pink. At the bottom, there are buttons for 'fit', '100%', '66%', '25%', and '10%', along with a printer icon. The starting point is '(0)1-Introduction :Welcome to the P' and the exit is '(7)2-Exit Option :This is question 92'.

Use the Filter to zoom-in on a series of Questions assigned to a particular Step.

Question List
Here is where you will add and delete questions in the interview. Added and inserted questions are automatically numbered in consecutive fashion. Question names can also be modified by the author.

Questions are also sorted by step number and name, and do not necessarily accord with the order in which they

Deleted a Question.

Added Questions are not connected to surrounding Questions.

Inserted Questions are connected to the two questions immediately surrounding it.

Cloned Questions are an exact copy of the question cloned.

Question Flowchart
Here is where you can get a “bird’s eye” view of the entire interview.

The Flowchart shows how each of the questions are connected, where advanced logic is taking place, where repeat-dialogs are located, where a question is unconnected, and where the interview begins and ends.

Use these buttons to Copy and Paste Questions from one interview to another.

Print the entire flowchart using the printer icon.

Use these button selections to zoom-in on the Questions.

Select starting and optional exit question here.

Question Tab

The screenshot shows the 'Question Design Window' in the A2J Author application. The window is titled 'My Interview [not saved]' and contains several sections:

- Question:** A blue button to navigate to the question design area.
- Fields:** A section for adding data collection fields.
- Buttons:** A section for adding 'Continue', 'Yes/No', 'Submit', and other buttons.
- Advanced:** A section for writing conditions or logic for branching or setting variables.
- Design Notes:** A section for including metadata.

The main design area includes the following fields and options:

- Step:** A dropdown menu currently set to '1. DO YOU QUALIFY?'.
- Name:** A text field containing '1-Question 1'.
- Text:** A rich text editor with formatting options (B, I, U, P) and an audio icon. The text reads 'Text of my first question goes here.'.
- Learn More:** A text field for additional information.
- Question Help:** A text field for help text.
- Text Reader Tag:** A dropdown menu with options: 'Text', 'Show Me Graphic', 'Show Me Video', and 'Counting variable'.
- Thumbnail:** A preview area showing a speech bubble with the question text and a 'Continue' button.

Red callout boxes with arrows point to specific features, providing the following instructions:

- Step:** 'Select the step to which the Question belongs & name the question for easy reference.'
- Name:** 'Add audio file for Question Text here.'
- Fields Tab:** 'Add and design Fields to collect data under the Fields Tab.'
- Buttons Tab:** 'Add Continue, Yes/No, Submit and other buttons here.'
- Advanced Tab:** 'Write conditions or logic for branching or setting variables here.'
- Design Notes:** 'Include metadata here.'
- Text Field:** 'Design the text of each Question under the Question Tab in the Question Design Window.'
- Learn More/Question Help:** '"Just-in-Time Learning" features include: Pop-ups ("P" symbol) - provide definitions or further explanation of terms/choices; Hyperlinks (link symbol) - link to helpful external resources; Learn More/Question Help (Text option) - pose a frequently asked question and provide text to address the question; Learn More/Question Help (Show Me Graphic option) - provide graphical help by attaching a .jpg, .png, or .gif; and, Learn More/Question Help (Show Me Video option) - provide audio/visual help by attaching a short video file in .flv format.'
- Text Reader Tag:** 'Use a counting variable to index all variables in a question belonging to a repeat dialog.'

At the bottom of the window, there are buttons for 'XML', 'Preview', and 'Close', along with a progress indicator showing 100%, 66%, 25%, and 10%.

Fields Tab

Question Design Window

Question

Fields

Address 1:
Address 2:
City:
County:
State:
Zip:
Phone:

Add fields here.

Type: Text

Label: Address 1:

Variable: Client address line 1 TE

Default value:

Validation: User may leave blank
 User must fill in

Prompt: You must enter an address in the highlighted space before you can continue.

Audio:

Define the Field Type: Text, Number, Number Phone, Radio Button, Checkbox, etc.

Select an imported variable or type a new variable name here.

If you require users to fill in an answer, you can provide a prompt to explain why.

Record and attach an audio clip (.mp3) for your prompt.

Buttons

Continue

Advanced

Special Properties:

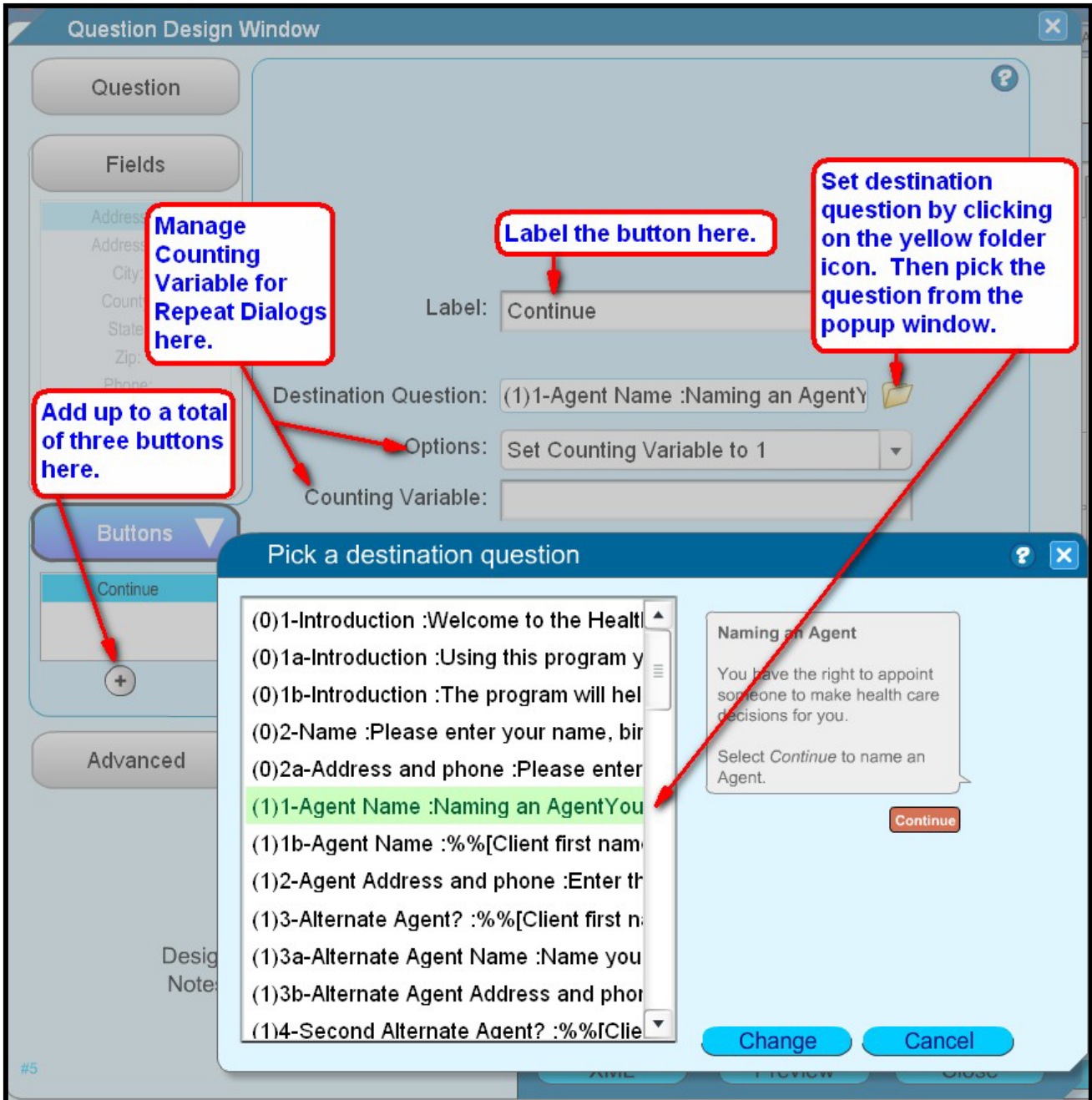
- *Text(Pick from list): create a custom list or attach a pre-formatted .xml list
- *Number, Number(Pick from list), and Date: set max and min limits to range of values allowed
- *Radio Buttons: set multiple choice values for each button
- *Text(Pick from list), Number(Pick from list), and Date: order list by ascending or descending order

Design Notes:

#5

XML Preview Close

Button Tab



Advanced Tab

Question Design Window

Question

Fields

- Address 1:
- Address 2:
- City:
- County:
- State:
- Zip:
- Phone:

Buttons

Advanced

Conditions:

#1 AFTER: TRUE IF TRUE THEN SET =

Event: After user presses button

Condition: Script an expression here: `[Income NU]>25000`
To force a variable to be set every time a user completes the question type 1=1 in the condition field.

Actions:

#1 IF TRUE THEN SET =

If: True

Action: set variable to value

Variable:

Value:

Notes:

Design Notes:

Callouts:

- Add a condition to be evaluated either after the user presses the button or before the user sees the question.
- Script an expression here: `[Income NU]>25000`
To force a variable to be set every time a user completes the question type 1=1 in the condition field.
- The action can be to set a variable to a value or to branch the user to a different question.
- Set multiple actions based on the expression written in the condition field.
- Actions can be based on whether the expression is true or false.
- To set a variable to a value, enter the variable name and the value.
The value can include:
 - * the value of another variable: `%%[Client first name TE]%%`
 - * a space: " ", or other text: "children"
 - * a function: `DOLLAR([Asset total NU])`

Buttons: XML, Preview, Close

Reports Tab

A Full Report includes a list of variables and steps; text of questions, fields, and prompts; button designations; and, descriptions of all conditions.

Options: Field lists and default prompts can be suppressed from the report.

Step Filter: It is also possible to run a report which includes only the questions associated with the Step designated in the Step Filter.

Select **Create Report** to view a Full Report in your internet browser.

Full report options:

- Suppress field lists
- Suppress default prompts
- Include field lists
- Include default prompts

Step Filter: All Steps

Create Report

Scripts for Audio:

Create Script

Select **Create Script** to view the script of all questions and prompts in an interview.

Note: This option should be used for spellchecking or when recording audio files.

To spellcheck, select **Create Script**. Then Copy ([Ctrl] + A) + [Ctrl]+C) and Paste ([Ctrl] + V) the text into a word processor. Run spellcheck.

To record audio, select **Create Script**. Print and read from the Script using audio recording software (e.g., Audacity) to create audio files for each question and prompt.

Preview Tab

Access To Justice
AT CHICAGO-KENT COLLEGE OF LAW

2 Please enter your address and telephone number.

Please enter your address and telephone number.
Address 1:
Address 2:
City:
County:
State: Choose from this list:
Zip:
Phone: () -

Continue

Learn More

Interview Variables

Variable	Loop	Value
User Gender	n/a	
User Avatar	n/a	
Client first name TE	n/a	John
Client middle name TE	n/a	R.
Client last name TE	n/a	Doe
Client gender MC	n/a	Male
Agent first name TE	n/a	
Agent middle name TE	n/a	
Agent last name TE	n/a	
Client address line 1 TE	n/a	
Client address line 2 TE	n/a	
Client city TE	n/a	
Client county TE	n/a	

Interview Script:

```

SET Client gender MC=%
Client gender MC=Male
(0)2a-Address and phone
Client address line 1 TE=
Client address line 2 TE=
Client city TE=
Client county TE=
Client state MC=
Client postal code TE=
Client telephone TE=
    
```

Preview Mode

- Variables
- Script
- Edit This
- Resume Edit

Evaluate

Keep the Interview Variables window open while previewing the interview to monitor whether variables are collecting the values entered in fields.
Variables can be saved as an .anx file for testing with a HotDocs template.

Clear Variable Values here.

Opens the Interview Variables and Interview Script windows.

End Preview Mode and Return to Question Design Window
"Edit This" returns you to the last question previewed.
"Resume Edit" returns you to the question where you began your preview session.

Keep the Interview Script window open while previewing the interview to monitor how A2J Author is processing advanced conditions and values collected during the interview.

Clear the history of the script here.

Evaluate an expression here.

Upload Tab

Select the Upload button to upload an interview to the LawHelp Interactive Server.

If you used an existing interview as a template or have copied questions from another interview, you can clear all references to media files (.jpg, .flv, and .mp3) by selecting Clear all media.

This interview includes audio files (.mp3), video files (.flv), and graphic files (.jpg). Notice that all attached files should be located in the same directory and folder as the interview (.a2j) in order to upload properly.

Files to upload:

- C:\Users\user\Documents\Work-CAJT\Conferences\EJC-2009\EJC-NotJustaPrettyFace.a2j
- C:\Users\user\Documents\Work-CAJT\Conferences\EJC-2009\2.flv
- C:\Users\user\Documents\Work-CAJT\Conferences\EJC-2009\2009ejc_john_mayer\2xalt.jpg
- C:\Users\user\Documents\Work-CAJT\Conferences\EJC-2009\2009ejc_john_mayer\cali.jpg
- C:\Users\user\Documents\Work-CAJT\Conferences\EJC-2009\CourtMap.JPG
- C:\Users\user\Documents\Work-CAJT\Conferences\EJC-2009\DecisionTree.JPG
- C:\Users\user\Documents\Work-CAJT\Conferences\EJC-2009\Spanish.mp3
- C:\Users\user\Documents\Work-CAJT\Conferences\EJC-2009>Welcome3.mp3

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APPENDIX C: Variable Naming Conventions

Whenever possible it is best to use some sort of convention for naming variables in your A2J Guided Interviews[®]. Using a standard convention is even better. Using a convention helps you keep track of what the variables represent, thus making editing and troubleshooting much easier.

Using a standard helps others also. Through the use of the LHI server, interviews and templates are made readily available to other organizations. Leveraging and combining the work of others with your own corresponding template or interview, whatever the case may be, is much easier where variable names are consistent. Furthermore, as time goes on, the possibilities for integration of interviews with document e-filing and case management system integration increase. Integration with these types of systems involves the transfer of data using XML standards. In the event an XSL transform for a particular A2J Guided Interview has already been built to correspond to a particular system, a lesser amount of modifications to that transform will be necessary as additional A2J Guided Interviews[®] are designed, so long as those interviews have used the same naming conventions for variables.

SUGGESTED VARIABLE NAMING CONVENTION

The examples in this Appendix were formulated by consulting formats developed by Marc Lauritsen of Capstone Practice Systems and Jeff Hogue of Legal Aid of Western New York; the LSXML schema, a standard for exchanging information between different law-related software; and, some peer review by other developers. The standard naming convention issue has received much attention recently from authors developing interviews and templates for the legal aid community. Thus, we expect that standards acceptable to most developers will eventually deviate from what is suggested here. So please 'stay tuned' to the HotDocs[®] listserv for more discussion on this topic. To subscribe to this list go to <http://lists.lstech.org/index.html/info/hotdocs>.

VARIABLE FORMATTING

In general, variable names are formatted with a capitalized first word, normal spaces, and then two capital letters at the end. These two capital letters tell everyone what kind of variable it should be: Text, Number, Multiple Choice, etc. For example, the variable you assign to capture the client’s first name should be called Client first name TE. TE stands for “text”. If you use a proper noun, though, capitalize the proper noun, e.g., Landlord is Massachusetts corporation TF.

VARIABLE SUFFIX

The variable types and corresponding suffix conventions you will use most often in A2J Guided Interviews® are:

Variable Suffix	Variable Type	Description
TE	Text	Use for the vast majority of variables. Numbers are usually stored as text variables unless used to calculate something. Ex-> Client first name TE or Client postal code TE
MC	Multiple Choice	Use when you want the end-user to pick a single answer from a list or series of “radio buttons”. (Note: Use true/false variables when you want to allow the end-user to select more than one choice from a list.) Ex-> Client state MC
DA	Date	Use when a specific date is captured. Ex-> Client birth date DA
TF	True/False	Use when the result can only be true or false. Ex-> Print bad conditions factsheet TF might be set in an A2J Guided Interview™ to decide whether or not to print a certain factsheet with the output.
NU	Number	Use when the variable is used in a math equation. Ex-> Client asset amount NU
CO	Computation	Used in HotDocs® templates, NOT in A2J Guided Interviews®. It is most often used to combine other variables. Ex-> Client full name CO Can be set to equal = Client first name TE + Client middle name TE + Client last name TE

VARIABLE NAMING CONVENTIONS

CLIENT INFORMATION

The Client is the person who will be filing the pleading, or the “person served.” Only programmers see this variable name, so we use Client, understanding that we don’t mean a client of an attorney.

Variable Name	Description
Client first name TE	
Client middle name TE	
Client last name TE	
Client suffix MC	
Client address line1 TE	
Client address line2 TE	
Client city TE	
Client county MC	(If client might be from another state, this can be Client county TE)
Client state MC	There is a standard external file called ussstates.xml
Client postal code TE	This is the zip code, but postal code matches the xml lingo.
Client address CO	HotDocs® variable that combines the address info
Client home phone TE	Today, cell and home phone are often the same
Client cell phone TE	
Client alternate phone TE	Phone that belongs to family or shelter
Client marital status MC	We need a standard list of status choices.
Client mailing address line1 TE	
Client mailing address line2 TE	
Client mailing city TE	
Client mailing state MC	There is a standard external file called ussstates.xml

VARIABLE NAMING CONVENTIONS

Variable Name	Description
Client mailing postal code TE	
Client birth date DA	
Client email address TE	
Client has children TF	True/false variable that is set to true if client has children. Generally, this should mean client has children in the financial household, since this variable might be used for eligibility in some interviews.
Client is married TF	
Client primary language TE	
Client ethnicity TE	
Client citizenship MC	USA, for example. Oddly, LSXML uses a 3 letter code for countries. A standard list is needed.

ADVERSE INFORMATION

When there is only one opposing party, use Adverse as the tag for the opposing party. If you have more than one opposing party, identify them by role: Undertenant last name TE, etc. We are not creating standards for all of these potential roles.

Variable Name	Description
Adverse first name TE	Could be the soon-to-be-former husband
Adverse middle name TE	
Adverse last name TE	
Adverse suffix MC	
Landlord1 first name TE	If it is possible to have two adverse parties, identify by role. (Linda and Lenny Landlord both brought the eviction proceeding)
Landlord2 first name TE	

VARIABLE NAMING CONVENTIONS

SPOUSE INFORMATION

Variable Name	Description
Client is married TF and Client is divorced TF	Marital status.
<i>If using a multiple choice option, then use:</i>	
Client marital status MC	
Spouse first name TE	The spouse name variables follow the same convention as the client names.
Spouse birth date DA	
Spouse gender MC	
Spouse information dialog CO	HD only

CHILD INFORMATION

Variable Name	Description
Children NU	Number of children in the household. If you need a different count, such as minor children or children not in foster care, use a different variable.
Child first name TE	Same convention as the client name variables.
Child gender MC	
Child state MC	
Child birth date DA	
Children dialog title CO	HotDocs [®] only



The template questions in a new interview in A2J Author[®] use variables according to this convention. Likewise, the sample questions found in the browse menu under the Fields Tab also include variables according to the conventions suggested above. Keep in mind, however, that the standard naming convention issue has yet to be settled, and we expect that standards acceptable to most developers will change, even if only slightly, from what is suggested here. As this Authoring Guide is a living document, it will be revised as needed in accordance with standards ultimately accepted by the authoring community. To ‘stay tuned’ to the standards conversation occurring most frequently on the Document Assembly listserv, request a subscription to that list at the following location: <https://lists.mayfirst.org/cgi-bin/mailman/listinfo/docassembly>.



The Starter Interviews included in the A2J Author[®] Starter-Kit also use variables according to the conventions suggested in this Appendix. The A2J Author[®] Starter-Kit can be downloaded from www.a2jauthor.org. Select the “Downloads” link. If desired, variable names can easily be changed for any of these interviews by modifying the names under the Variables Tab.

APPENDIX D: Frequently Asked Questions

These frequently asked questions cover a variety of topics, including general questions about the use of A2J Author[®], authoring and troubleshooting.

Will new users with completely no IT background be able to use A2J Author[®] efficiently?

A2J Author[®] was specifically designed for use by legal aid personnel, court clerks, etc. that do not have technical backgrounds. It is not necessary to be a computer programmer or have an IT background in order to program or write A2J Guided Interviews[®]. The scripting of the questions takes no more expertise than using a word processing program; and, the level of difficulty for writing various types of logical conditions is comparable to using a basic spreadsheet program.

Is there any support for ongoing usage of the software?

Developer calls are held on a periodic basis to address commonly asked questions and provide explanations of program features. In addition, we encourage all members of the growing A2J Author[®] developer community to place their questions in the discussion forums on this website so that knowledge and support can be shared.

What are other factors to consider before deciding if A2J Author[®] is suitable for a particular organization?

A2J Guided Interviews[®] created in the A2J Author[®] tool are more efficient for filling out forms. They can provide guidance to the user where human guidance is not available. A2J Guided Interviews[®] are more likely to be correctly filled out the first time so that the client is not going back and forth to gather information missed the first time. This also saves time for the court, judges, clerks, etc.

A2J Guided Interviews[®] can provide MORE INFORMATION than the form itself. It can ask questions to make sure that the client is filling out the right form thereby avoiding wasting their time on the wrong form and causing them frustration. This increases the client's overall satisfaction and lowers their level of upset while dealing with the bureaucracy of the courts.

A2J Guided Interviews[®] can provide supplemental information that educates the client regarding their issues. Just-in-time learning features can be used to point the user to

other web resources that may be hard for the client to find on their own or outside the context of filling out the form.

What is NPADO and will I need it to use A2J Author®?

A2J Author® is a tool that runs on Windows operating systems that is used to produce A2J Guided Interviews® that will run in any browser. Out of the box, A2J Author® allows authors (courts and legal services) to upload and host A2J Guided Interviews® on the LawHelp Interactive (LHI) server. The LHI server, not only hosts the A2J Guided Interview so that it can be served to the public, but it also provides document assembly services via HotDocs®. In very simple summary, A2J Author® is used to create customized A2J Guided Interviews®. A2J Guided Interviews® collect the information from the interviewee over the web. The interviewee's information is assembled (merged) with a customized template using the HotDocs® services on LHI. The assembled template (court form, pleading, letter, etc.) is then presented to the interviewee over the web. The interviewee can then print the document which is ready for filing, etc. Detailed information about the LHI server including who operates it can be found by visiting the About Us at www.lawhelpinteractive.org.

What document assembly or case management programs are compatible with A2J Author®?

Out of the box, A2J is compatible with HotDocs® for document assembly purposes. However, it is possible to develop XSL transforms that will translate the data exported in an A2J Guided Interview answer file (.anx) into an alternative XML format. One such XSLT has been written thus far for LSXML, which is used by Pika case management systems. For further information on this subject, please direct your system administrator to the following article: Local Server Setup & XML Transforms.

Besides online training materials, is there any other form of training available for A2J Author®?

We provide a complementary series of trainings for introductory and advanced users of A2J Author®. For further information send an inquiry to: a2j-author@kentlaw.edu.

Do I need HotDocs® if I have A2J Author®?

It is not necessary to use HotDocs® with A2J Author®. That said, if you want to use A2J Author® for document assembly, you need to use A2J Author® in conjunction with either HotDocs® or another document assembly program. Using A2J Author® with any other program, whether it is for the purpose of document assembly, case management system data collection, or e-filing, requires that the answer file generated by an A2J Guided Interview™ be translated using an XSL transform. For more information, please direct your system administrator to the following article on a2jauthor.org: [Local Server Setup & XML Transforms](http://a2jauthor.org/Local%20Server%20Setup%20&%20XML%20Transforms).

Is A2J Author® able to work with only session cookies?

A2J Author® does not set or read any session cookies. That is the job of the browser.

<p>Are there any long term plans for A2J Author[®]?</p> <hr/>	<p>A2J Author[®] is primarily supported by grant-funded projects. A project is currently underway that will maintain the A2J Author[®] project through January 2012. A sustainability evaluation is underway to plan for future support of A2J Author[®].</p>
<p>Is a specific database (SQL or Oracle) required for the use of A2J Author[®]?</p> <hr/>	<p>No specific database is required.</p>
<p>What points should I keep in mind when planning and working on an A2J Guided Interview project?</p> <hr/>	<p>A2J Guided Interview[™] Development Tips - courtesy of Camille Cameron:</p> <ol style="list-style-type: none"> 1. Don't over plan, just get a general big picture idea in mind, start with laying out the Steps and get started. 2. Always keep your audience in mind when you are writing the interview questions. Consider all of the terms you are using to ask a question and either simplify them, or if you can offer a resource (Learn More), try to do so. For example: a) Define technical words like plaintiff/defendant; b) Give examples (but make it clear they are examples, not legal advice); c) Offer links to look up zip codes, counties, phone numbers, etc. 3. Whatever amount of time you spend developing your interview, plan on about twice that for collecting feedback/comments, testing and making revisions. 4. Before uploading, do not forget to clean up your variables and make sure all of the 'types' are set correctly -- especially for variables created "on-the-fly". For example: 'check all that apply' type multiple choice questions should be True/False variables in HotfDocs.
<p>Where is the date coming from in the TODAY function?</p> <hr/>	<p>...the end user's computer clock? or the server where the A2J Guided Interview[™] is living? "TODAY" comes from the end user's computer clock.</p>
<p>What screen size is A2J designed for?</p> <hr/>	<p>A2J Author[®] is currently designed for an 800x640 browser window which assumes the screen is at least 1024 wide.</p>