A2J Author®
Field Types v. Variable Types

Field Types v. Variable Types

- **What is the Difference?**
- Field Types
  - Categories
  - Field Properties
  - Field Templates
  - Gender – Field of It's Own
- Variable Types
  - Categories
  - Gender – Variable of It's Own
  - Variable Naming
- Matching Field & Variable Types
- Additional Resources

What is the Difference?

▸ Field Type: Format of the data entry area where end-users enter information.

▸ Variable Type: How data should be treated once entered by end-user.

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Field Type Categories
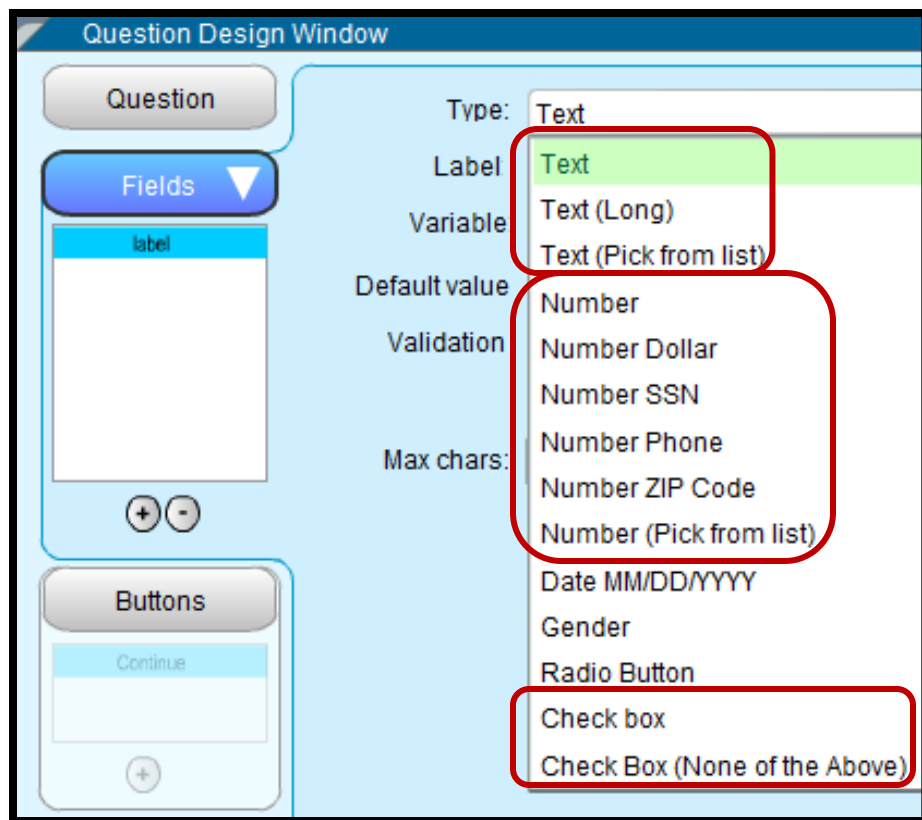
- There are six basic field types categories
  - Text (optional field designs)
  - Number (optional field designs)
  - Date
  - Gender
  - Radio Button
  - Checkbox ("None of the Above" allows the end-user to answer without selecting an actual answer)

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Field Properties

▸ Every field type has three properties which need to be defined: **Type, Label and Variable**

▸ **Default Value**: set a "default value" for most field types except Checkboxes and Gender.
(value appears in the field, but end-user can enter alternate value)

Question Design Window

Question

Fields ▼

Employer Name:
County:
What are your job duties

⊕ ⊖

Buttons

Continue

Type: Text (Pick from list)
Label: County:
Variable: Employer county MC
Default value: Cook
List: ⦿ Customized List
         Ed
         ○ List from external fil
Order List: Ascending
Validation: ⦿ User may leave blank
                ○ User must fill in

▸ **Validation**: require the user to give an answer or allow them to leave it blank. "User may leave blank" is the default setting.

▸ **Other properties**: field types may have additional optional properties such as "max characters," "limit values," "calculator," and "calendar."

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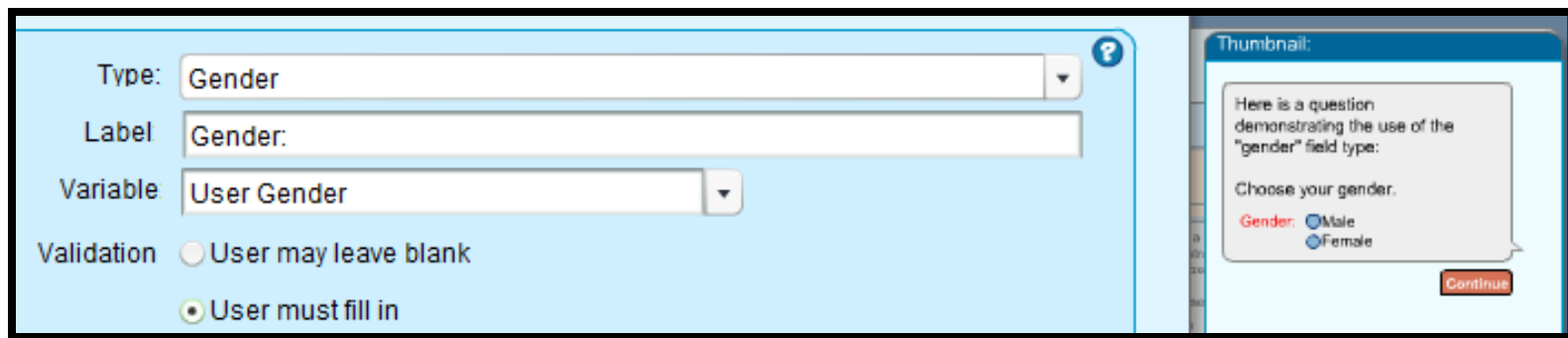
Field Templates

‣ A2J Author has 18 field templates. Scroll list to see a preview.

‣ Templates might create multiple fields with one click.

‣ **Be careful!**
Templates create variables.
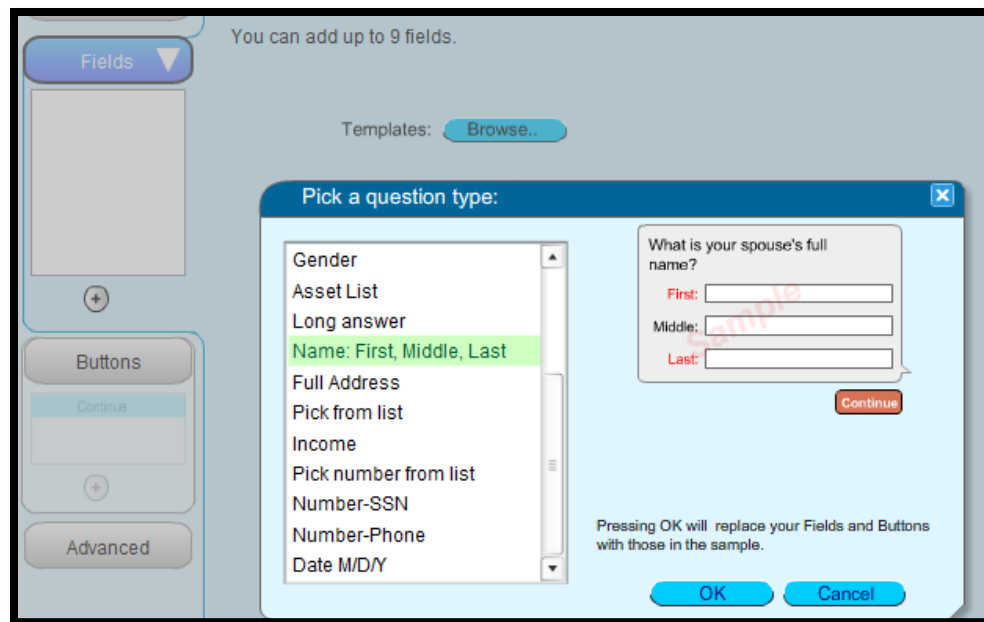
Gender – Field of It's Own

‣ User Gender is collected to create an avatar of the end-user.

‣ Gender field appears as Radio Buttons.

‣ When selecting the Gender field, the Label, Variable and Validation properties are pre-set.

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Variable Type Categories

▸ Variable type determines how the data collected will be evaluated.

▸ **A2J Author 6 Variable Types:**
  - **Text:** Stores data to be treated as text (including numbers like SSN).
  - **Number:** Stores data that needs to be evaluated ([Children NU] > 1) or used in a calculation ([Income amount NU] + [Benefits amount NU]).
  - **Date:** Stores dates. Could store date as text, but date fields allows calculations such as ([Filing date DA] + 90).
  - **True/False:** Stores value of "true" or "false" only.
  - **Multiple Choice:** Stores a single value from set of options.
  - **Unknown:** Default setting when unsure of variable types (assigned to variables created with buttons).

▸ **Special Program Variables:** User Avatar, User Gender, A2J Step (1-12), A2J Navigation TF, A2J Interview Incomplete TF.
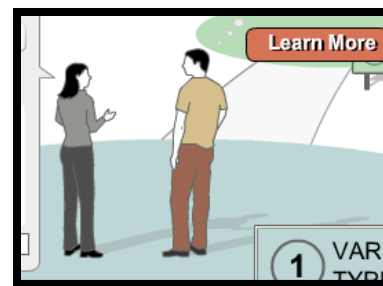
Gender – Variable of It's Own

▸ Gender variable name is pre-set as "User Gender."
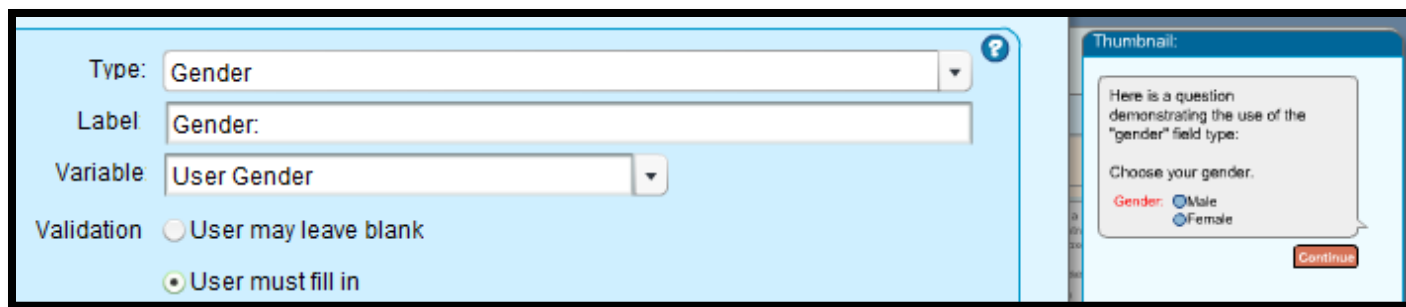
▸ "User Gender" is the only variable that can create an avatar of the end-user.
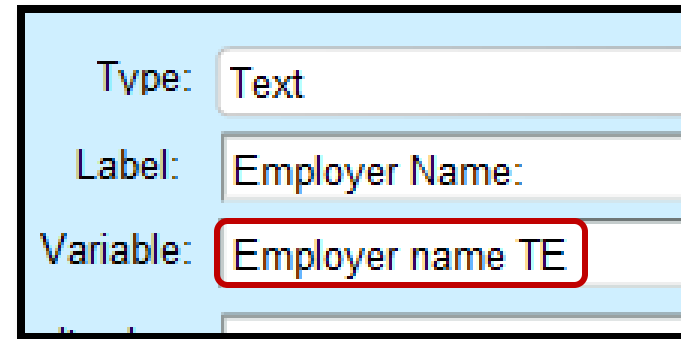

▸ "User Gender" is a Text variable type.

▸ If HotDocs variable has a different name use the Advanced Tab.

Variable Naming

▸ **Community standard variable naming convention:**

- Capitalize the first letter of first word only.
- Spaces between words.
- Include 2 letter abbreviation for the variable type at the end.

Type:	Text
Label:	Employer Name:
Variable:	Employer name TE

▸ **Variable Naming Examples:**

- Text : User full address TE
- Number: User age NU
- Date: Court date DA
- True/False: Married TF
- Multiple Choice: Income type MC

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Matching Field & Variable Types

▸ **Field type does not always match Variable type**

▸ Text (pick from list) is a multiple choice variable type.

▸ Number fields gathering data that is not used for evaluation or computation are matched with Text variable types. (SSN, Phone, ZIP)

▸ Checkboxes are a series of individual True/False variables, not a multiple choice variable.

Matching Field & Variable Types

‣ A2J Author defaults variables created with new fields as the most appropriate variable type.

‣ Chosen A2J Author Field Type = A2J Author Default Variable Type
  - Text = Text
  - Text (Pick from list) = Multiple Choice
  - Text (Long) = Text
  - Number = Number
  - Number Dollar = Number
  - Number SSN = Text
  - Number Phone = Text
  - Number ZIP Code = Text
  - Number (Pick from list) = Number (notice different from "Text pick from list")
  - Date MM/DD/YYY = Date
  - Gender = Gender
  - Radio Button = Multiple Choice
  - Check box = True/False
  - Check Box (None of the Above) = True/False

Matching Field & Variable Types

▸ Verify, assign and/or change variable types on the Variables tab

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Additional Resources

- **A2J Authoring Guide**
  - Chapter 7: Creating Questions – Pg. 80 – Fields Tab
  - Chapter 5: Variables Tab – Pgs. 41 – Variable Type Properties
  - Chapter 5: Variables Tab – Pgs.44 – Variables Reference Chart (indicates which A2J variable types correspond with which HotDocs variable types)

- **Online Authoring Guide on A2JAuthor.org**
  - Interview Questions – Tutorials – Field Types
  - Interview Questions – Modules – Fields Types Training Module (download demo .a2j)
  - Variables – Tutorials – Variable Types

- **Trainings & Presentations on A2JAuthor.org**
  - Previously recorded trainings and presentations

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