Expert Guide

For

Doxserá®

Doxserá DB

AURORA webData™

This expert guide covers Doxserá (**Dox**), Doxserá DB (**DB**), and Aurora webData (**AwD**). Features that are exclusive to Doxserá DB or Aurora webData are tagged with a **DoxDB** or **AwD** flag.

DoxDB AwD

powered by TheFormTool

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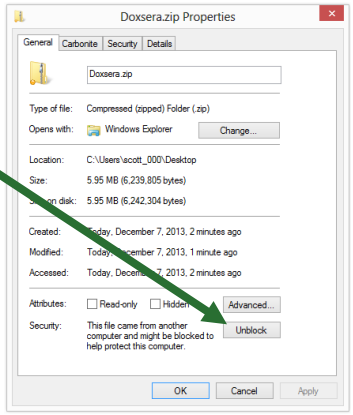
One-Page Cheat Sheet

For those who are driven to get started *right now,* without filler or fluff:



1. **Install**
   Right-click the **Doxsera.zip**, **DoxseraDB.zip**, or **Aurora.zip** file you downloaded and choose **Properties**. If you see an **Unblock** button, click it to unblock the file, then click **Apply**, **OK**.

   Double-click the same file to see the files it contains.

   Double-click the **Doxsera.docm**, **DoxseraDB.docm**, or **Aurora.docm** file to install.

2. **Activate**
   Go to the new **Doxserá**, **Doxserá DB**, or **Aurora** tab in Microsoft Word, click **Options**, **License code**, and enter the Registered Name and License Code we emailed to you. Or retrieve your license code by logging into your account at www.theformtool.com.

Quick Tip: Watch our videos instead of Steps 3 and 4: www.theformtool.com/video-demonstration-of-theformtool

3. **Create a form**
   Open a document or form you've used in the past, and save a copy wherever you like to store forms.

Older Files: If you're starting with an older document (created in Word 2003 or earlier), be sure to save it in one of Word's new formats (.docx or .dotx) with the **Maintain Compatibility** checkbox UNCHECKED.

Add a Questionnaire at the bottom of the form by clicking **Questionnaire**, **Create** on the **Dox**/**DB**/**AwD** tab.

Type questions in the Question column and a short label for each question in the Label column, like so:

Doxserá (c) 2016 Snapdone, Inc.		
Label	**Question**	**Answer**
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Add Fields to the form by placing the cursor wherever a Field is needed and clicking **Field** on the **Dox**/**DB**/**AwD** tab. The result will look something like this:

My name is {Signer}. I was born on {DOB}.

Signed: _____
{SIGNER}

Save and close the finished form.

4. **Use your new smart form to create a document**
   Open the form you created in Step 3. Type answers in the Questionnaire and click **Fill** on the **Dox**/**DB**/**AwD** tab. Done!

5. **For later:** This manual and the ***Quick-Start Guide*** are available at www.theformtool.com, along with videos, program support, and forums where you can ask questions, report problems, make suggestions, and exchange tips with the authors and other users.

Foreword

Although this is a manual that focuses exclusively on forms – how to make them more intelligent, more productive and more useful – this Expert Guide is really all about people.

It's written to help three groups in particular: a form's audience, its author and its user.

First of all, of course, are the Readers, the form's ultimate audience, those seeking information. In the final analysis, our software is ultimately about clients and their opposition; companies and customers; judges and court officials; regulators and special interest groups; knowledge worker and information user media and the general public. We hope to improve communication between you and everyone you hope to influence with the written word, whether digital or paper.

This guide is written from the perspective of the Form Author, the expert who wishes to expand the influence of his or her expertise by making it easier for others to complete a complex form quickly, accurately and as expertly as would the Author merely by answering a few questions. Our software allows the expert Author to lay out the exact circumstances where "A" is appropriate, the exceptions where "B" or "C" should apply, and the gray areas where "A" should be modified but not replaced. Since forms are by definition useful in repetitive similar-but-not-identical circumstances, the number of alternatives for consideration and inclusion are finite and therefore manageable by software.

Finally, our software is designed to make a real difference to Form Users, the men and women tasked with merging current information into pre-created documents that can at once be simplistic and complex, literal and figurative, static and dynamic. It works so well because it uses technology to make the dynamically complex alternatives built into a form simple enough to be exactly, accurately and quickly replicable by non-experts. The expert determines the outcome he or she intends; then the non-expert furnishes the input in one-fifth the time otherwise required.

As your use of Doxserá, Doxserá DB, and Aurora webData expands, watch your productivity increase while your costs decrease. Our customers report an average *three times* increase in productivity and a 100% decrease in errors, for a *20% reduction in total costs*, compared to their previous document assembly technology.

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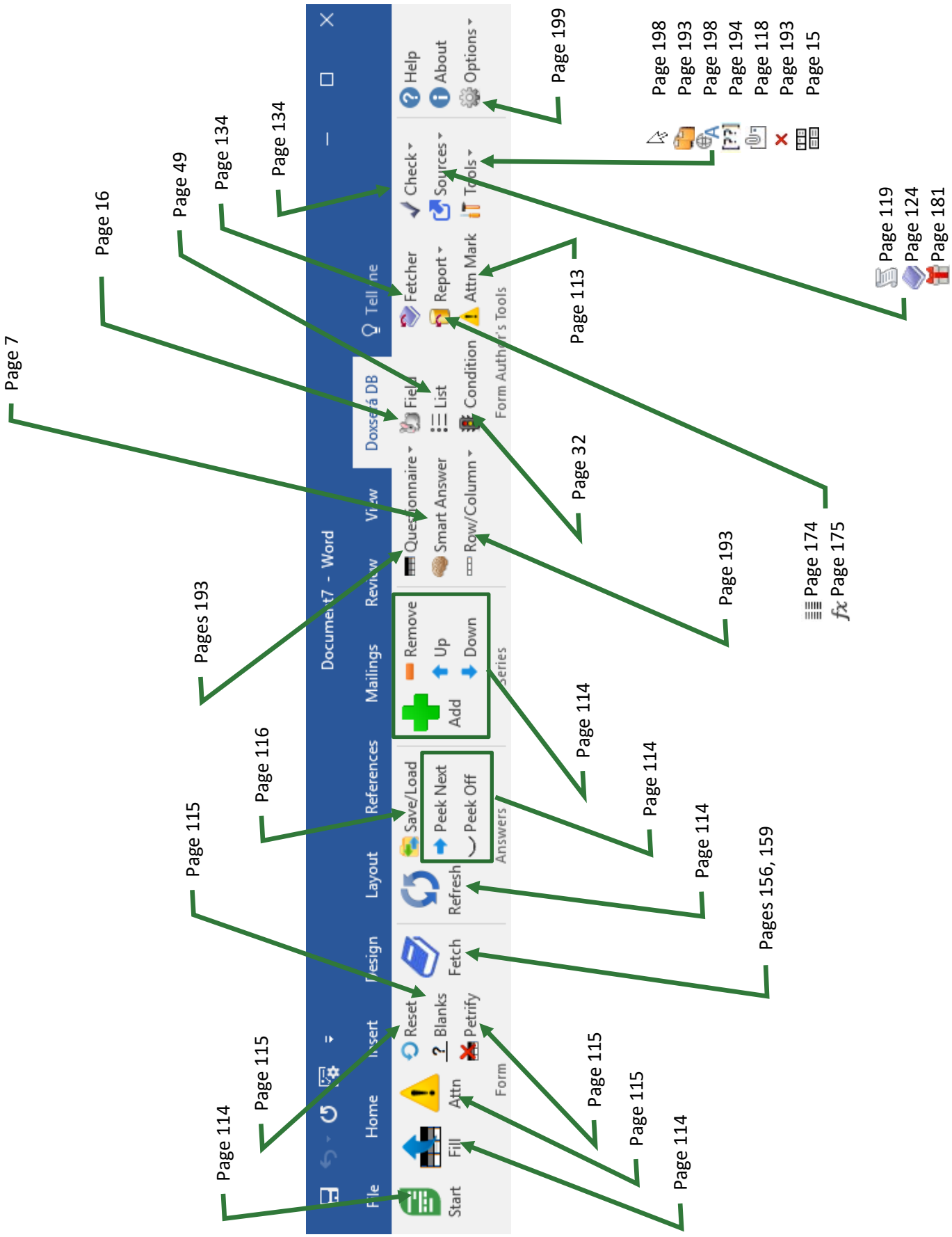
Meet the Buttons

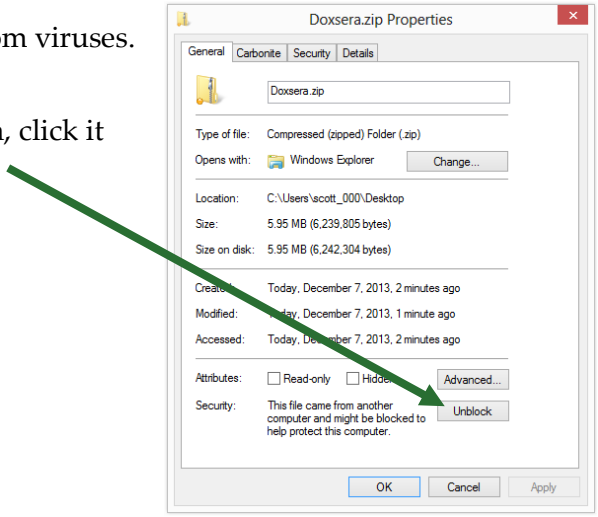


Installing

Step 1: Is the File Blocked?

Windows sometimes blocks downloaded files to protect you from viruses.

Right-click the **Doxsera.zip**, **DoxseraDB.zip**, or **Aurora.zip** file you downloaded and choose **Properties**. If you see an **Unblock** button, click it to unblock the file, then click **Apply**, **OK**.



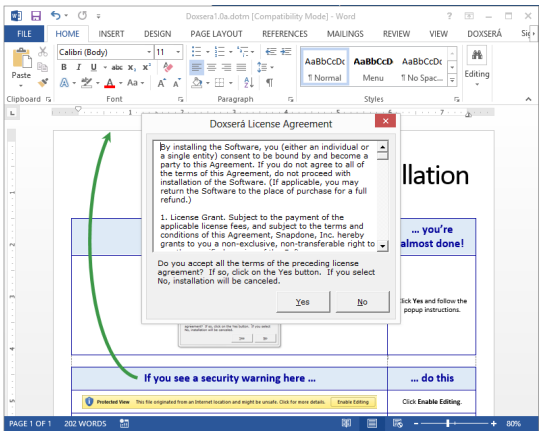
Step 2: Open the Installation File

Open the file you downloaded to see its contents. Double-click on the **Doxsera.docm**, **DoxseraDB.docm**, or **Aurora.docm** file. (Depending on your computer's configuration, you might not see the **.docm** at the end of the filename.)

Step 3: Security Warnings?

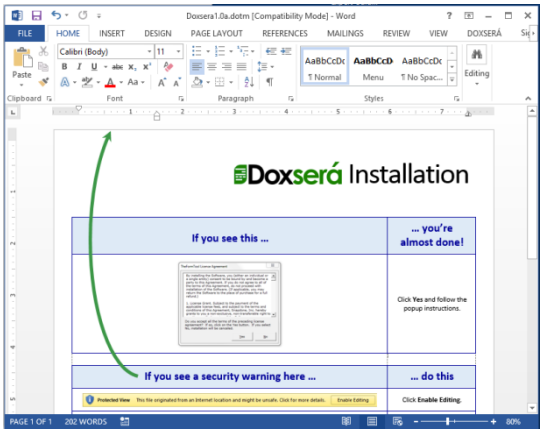
Depending on Windows and Microsoft Word settings, you may need to respond to one or more security warnings before installation can proceed.

If you see this ...



You're almost done. Click **Yes** to the license agreement, then **OK** to install.

If you see this ...

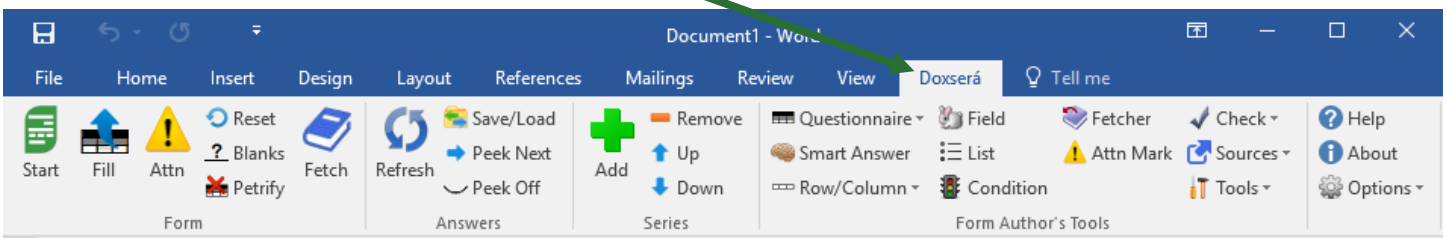


Follow the on-screen instructions to respond to your computer's security warnings.

You can reread the license agreement later by clicking **Options**, **License agreement**.

Step 4: Close and Reopen Word

Close Microsoft Word completely, including all open documents. When you reopen Microsoft Word, you'll find a new tab on Word's ribbon menu labeled **Doxserá**, **Doxserá DB**, or **Aurora**. Click that tab to reveal the new commands.



If the **Dox**/**DB**/**AwD** tab does not appear, try restarting your computer. If that doesn't work, please contact us at www.theformtool.com/resources so we can help get you started.

Step 5: Enter License Code

To activate the program, click **Options**, **License code** and enter the registered name and license code we emailed to you. If you need to buy a license, visit www.theformtool.com. If you've lost your license code, check your emailed receipt or log into your account at www.theformtool.com (click the **Log In** button in top right corner).

Step 6: Sharing Information on a Network

If you own multiple licenses, see Sharing Information on page 200.

Step 7: Updates

Check for updates periodically at our website. To be notified when updates are available, subscribe to our newsletter at www.theformtool.com/newsletter.

The Basics

What's It Do?

Authors

Think of the process of filling in a form as a series of questions and answers. The form author asks a question ("What's the name of the Grantor?"), and the form user answers the question ("Gretel Purcell").

Dox/**DB**/**AwD** makes it easy for the form author to ask a series of questions, and easy for form users to answer those questions.

Creating a Basic Form

We'll turn this document into a form. If you'd like to work along with this example, begin by typing or copying the text shown here into a blank document.

My name is Abigail Bentley. I was born on April 17, 1960.

Signed: _____
ABIGAIL BENTLEY

Step 1: Create the Questionnaire

Click **Questionnaire**, **Create** on the **Dox**/**DB**/**AwD** tab to add a Questionnaire to the end of the form.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**

Meet the Questionnaire! Take a moment to get familiar with the three-column layout of the Questionnaire. Once you're comfortable with the Label/Question/Answer pattern, guru status is within reach.

In this example, we need to ask the form user for the signer's name and birthdate. Type the two questions in the Questionnaire, including a short label for each.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**
Signer	What's the name of the signer?	
DOB	What's the birthdate of the signer?	

Adding Rows to the Questionnaire

When first creating the Questionnaire, add rows just as you would in any other Word table – by pressing **Tab** when your cursor is in the table's last cell.

Later on, **Dox**/**DB**/**AwD** "locks" the Questionnaire so form users can't accidentally alter it. But you can still add rows by clicking **Row/Column**, **Add**.

Omit space characters in Labels. For example, **SignerName** and **Signer_Name** are both okay, but don't use **Signer Name** with a space in the middle. Also avoid special characters like brackets, slashes, and braces. But don't worry too much – if you try to use a character that's not allowed, **Dox**/**DB**/**AwD** will automatically remove it for you during Step 2 below. The **Check Form** command (page 197) also catches labeling problems and is a great tool for every form author's belt.

Step 2: Add Fields to the Form

In the body of the form, add Fields wherever answers need to be inserted. For example, this form needs three Fields.

My name is Abigail Bentley. I was born on April 17, 1960.

Signed:

_____

ABIGAIL BENTLEY

Select **Abigail Bentley** and click **Field** (yes, it's the friendly Field Bunny) to open the Field screen.

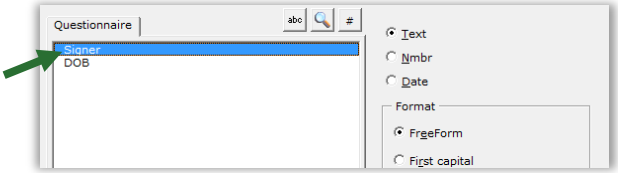
My name is Abigail Bentley. I was born on April 17, 1960.

Signed:

_____

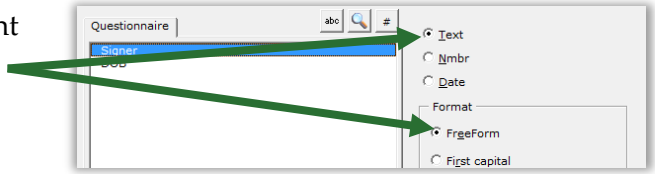
ABIGAIL BENTLEY

All the questions in the Questionnaire are listed here, using the labels you provided. In this example, there are only two: **Signer** and **DOB**. Select **Signer**.



Various Field types and formats can be selected on the right side of the screen. In this example, the default is correct (**Text**, **FreeForm**).

Click **OK** to finish.



Formatting Fields. The "format" choices above actually change the text of a Field rather than using Word's font formatting feature – from **abc** to **ABC**, for example. But you can also apply any type of font formatting to a Field, using Word's ordinary formatting commands – bold, underline, font, small caps, color, etc.

Notice that the Field you added shows up as a gray bracketed item: {Signer}.

My name is {Signer}. I was born on April 17, 1960.

Signed:

_____

ABIGAIL BENTLEY

Select **April 17, 1960** and click **Field** to add the second Field. Use the same steps as above, but this time choose the **DOB** label and the **Date** type.

My name is {Signer}. I was born on April 17, 1960.

Signed:

_____

ABIGAIL BENTLEY

Finally, select **ABIGAIL BENTLEY** and click **Field** to add the last Field. For this Field choose the **Signer** label and **UPPERCASE** format.

My name is {Signer}. I was born on {DOB}.

Signed:

_____

ABIGAIL BENTLEY

After adding all three Fields, the finished form looks like this. The first Field uses **Text**, **FreeForm**, the second uses **Date**, and the third uses **Text**, **UPPERCASE**.

Save the finished form wherever you like to keep your forms. (Consider saving your forms as *templates* instead of *documents*. See Documents Versus Templates on page 7.)

My name is {Signer}. I was born on {DOB}.

Signed:

_____

{SIGNER}

Meet the Brackets. The gray bracketed items above ({Signer}, {DOB}, and {SIGNER}) will become a familiar sight. They mark where each answer in the Questionnaire belongs in the finished document. Once the novelty wears off, you'll find yourself comfortably deleting, copying, and pasting these bracketed items just as you do other text, sometimes saving a few clicks by copying a Field rather than creating it from scratch.

Using a Basic Form

Users

Open a form and click the **Start** button to move to the Questionnaire. Answer the questions, like so:

Doxserá (c) 2016 Snapdone, Inc.		
Label	**Question**	**Answer**
Signer	What's the name of the signer?	Horace Blixt
DOB	What's the birthdate of the signer?	5/23/72

Then click **Fill** to fill in the form. Done!

My name is Horace Blixt. I was born on May 23, 1972.

Signed: _____
HORACE BLIXT

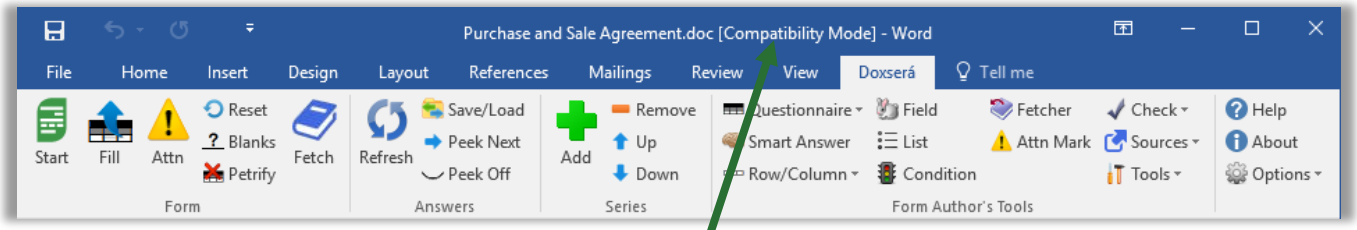
Turning Old Files Into New Forms

Authors

Old File Formats

You're using a recent version of Microsoft Word now, but some of your old documents and forms might have been created with earlier versions. It's important to convert those old files to the new format so all **Dox**/**DB**/**AwD** features are available.

Does it need to be converted?



Look at the top of the Word screen. If you see **[Compatibility Mode]**, the form needs to be converted.

Converting an old file

Open your old document or template in Word. Depending on what version of Word you use:

Word 2007	Word 2010 and later
1. Click the **Office** button (the round button in the top left corner), then click **Save As**. 2. In the **Save as type** box, choose **Word Document (.docx)** or **Word Template (.dotx)**. 3. Near the bottom of the screen, make sure the **Maintain compatibility with Word 97-2003** checkbox is UNCHECKED. 4. Click **Save**.	1. Click **File**, **Save As**. 2. In the **Save as type** box, choose **Word Document (.docx)** or **Word Template (.dotx)**. 3. Near the bottom of the screen, make sure the **Maintain compatibility with previous versions of Word** checkbox is UNCHECKED. 4. Click **Save**. 5. If you still see **[Compatibility Mode]** at the top of the screen, click **File**, **Info**, **Convert**.

Documents Versus Templates

As you create forms, you can save them as documents (files that end with **.docx**) or templates (files that end with **.dotx**). **Dox**/**DB**/**AwD** works fine with both types of files, but saving forms as templates does have one important advantage: When form users double-click a template to open it, Word creates a *new unsaved document* based on that template. This makes it impossible for the form user to accidentally overwrite the original form – when they click **Save**, they are prompted to save their brand new document elsewhere.

As the form author, you will sometimes need to revise the original form. Instead of double-clicking the template to open it, right-click and choose **Open**. This opens the form itself, rather than creating a new document, so you can make changes and save the revised form.

Creating Smarter Forms

Dox/**DB**/**AwD** builds intelligence right into the form, automatically including or removing optional text, changing pronouns and plurals, converting date and number formats, performing math calculations, and more. A single click by the form user can change the entire landscape of the finished document.

Smart Answers

Authors

In the realm of form creation, different types of questions call for different types of answers. You might ask for a yes/no response ("Is the signer a U.S. citizen?"), or you might want to offer choices ("In which of these counties is the property located?"), or you might ask for a series of items with a single question ("List all the shareholders.").

Dox/**DB**/**AwD** provides several types of answers, making it easy for form users to respond correctly and intuitively to every question. To turn a regular answer into a Smart Answer, first put the cursor in an answer box.

		Doxserá (c) 2011-2016 Snapdone, Inc.
Label	Question	Answer
Buyer	Buyer's name	
Seller	Seller's name	

These are answer boxes – one box for the Buyer question, and another for the Seller question.

To change the answer type for a particular question in the Questionnaire, put the cursor in its answer box and click **Smart Answer** to open the Smart Answer screen.

Tabs across the top of the screen allow you to choose one of five answer types.

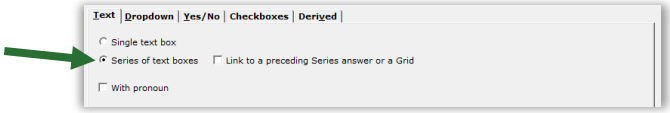
Text Answers

Each answer in the Questionnaire begins as a Text answer and stays that way unless you alter it. Text answers are appropriate for questions like: "What's the signer's name?" "What's the ID number?" "What was the date of the injury?" "What's the amount due?"

Single/Series

Select **Single text box** when you are asking for a single piece of info ("Who are you?").

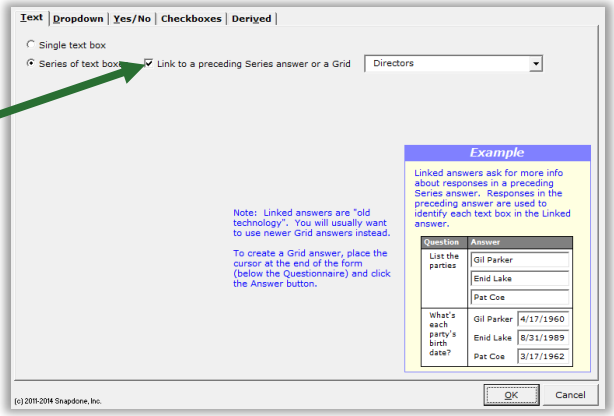
Select **Series of text boxes** to ask for several pieces of info ("What are the names of the shareholders?").



How many items in a series? When using a series answer, the form author need not specify the number of items. By default, the answer will be created with room for three items, but the form user can click **Add** to create additional slots as needed.

Linked series: If the form includes another series answer, you have the option of linking this answer to it: select **Link to a preceding series answer or a Grid**, and select the other answer.

For example, the first question in your form might ask for a list of directors (a series answer). The second question could be a linked answer asking for each director's email address.

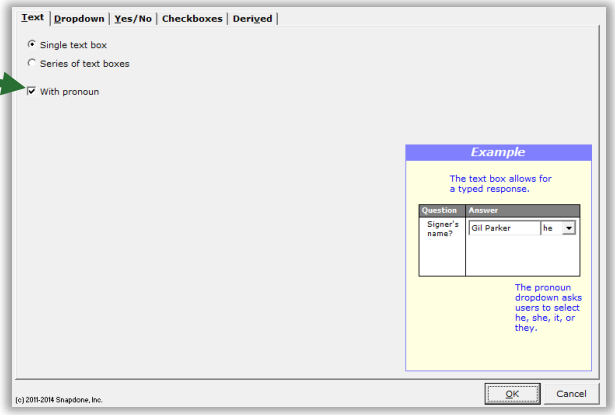


Note: linked answers are "old technology." You will usually want to use Grids instead (page 15).

With Pronoun

To include a pronoun box alongside a Text answer, select **With pronoun**.

The pronoun box allows the form user to select a pronoun to go along with their answer: **he**, **she**, **it**, or **they**. The form author can make use of this info throughout the form, using Pronoun Fields (page 23).

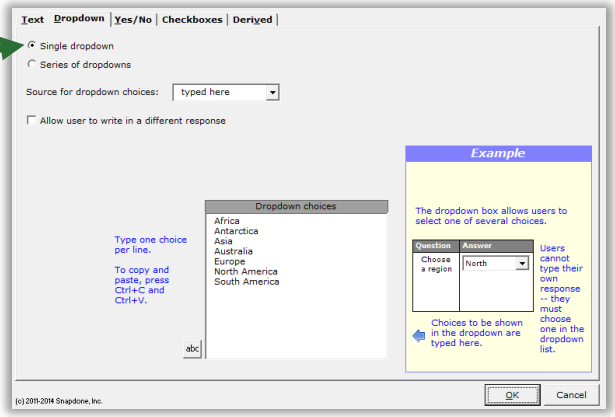


Dropdown Answers

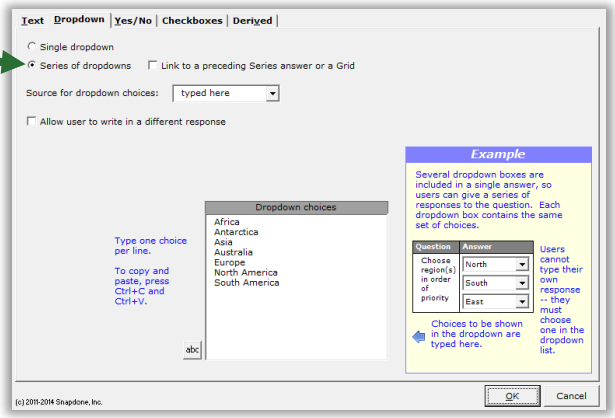
Dropdown answers present the form user with several choices in a dropdown list. The question "What's your favorite color?" could present a dropdown list of red, green, blue, and yellow. The question "What direction will you travel?" could present a dropdown list of north, south, east, and west.

Single/Series

Select **Single dropdown** when you are asking for a single piece of info ("On what continent do you live?").

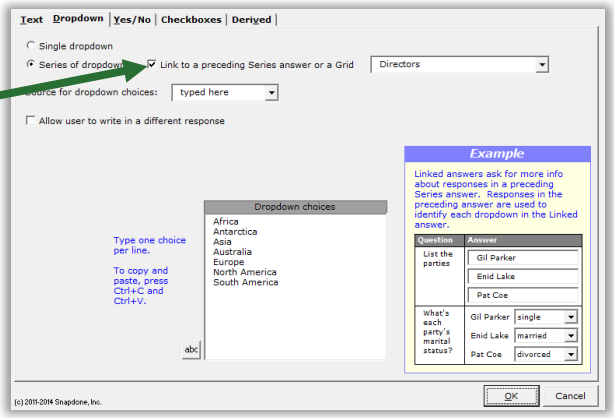


Select **Series of dropdowns** to ask for several pieces of info ("On what continents have you lived?").



Linked series: If the form includes another series answer, you have the option of linking this answer to it: select **Link to a preceding series answer or a Grid**, and select the other answer.

For example, the first question in your form might ask for a list of directors (a series answer). The second question could be a linked answer that asks in which continent each director resides.



Note: linked answers are "old technology." You will usually want to use Grids instead (page 15).

Source for Dropdown Choices

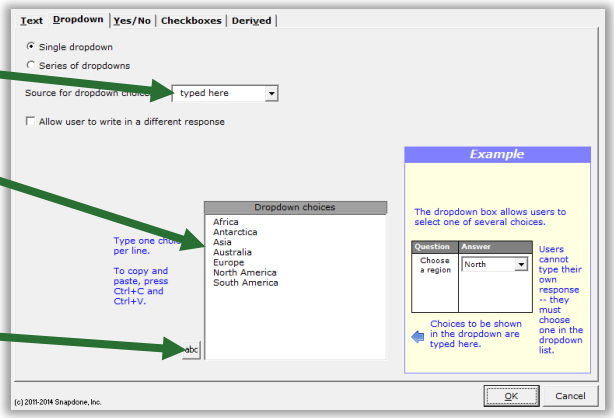
The list of choices in the dropdown box is drawn from one of four sources.

Source = typed here

The list of choices is typed right into the Smart Answer screen. Each choice is on a separate line.

You may rearrange items using **Ctrl+C**, **Ctrl+X**, and **Ctrl+P** to copy, cut, and paste.

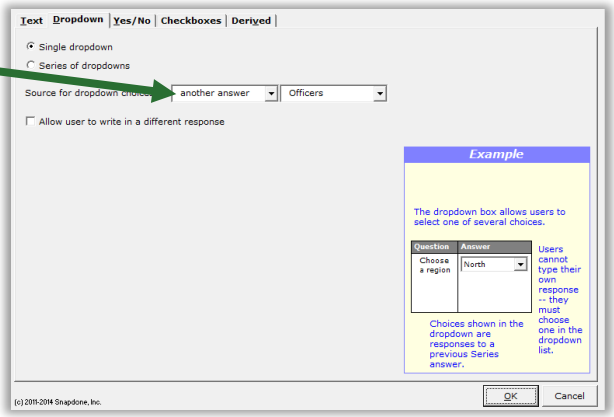
Click **abc** to sort items alphabetically.



Source = another answer

If the form includes another series answer, you have the option of using it as a source.

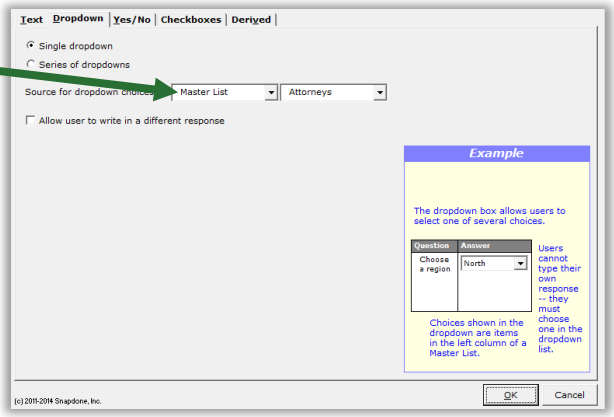
For example, the first question in your form might ask for a list of people who are officers (a series answer). The second question could ask who is the Treasurer, with a dropdown listing the people identified in the previous answer.



Source = Master List

If you have created any Master Lists (page 119), you may select one as a source.

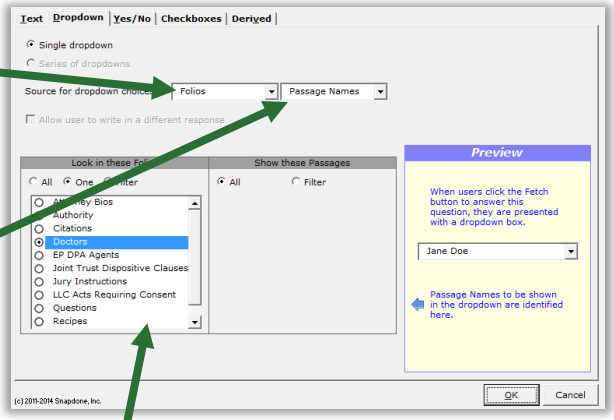
For example, a law office might have a Master List of member attorneys. A form could ask for the name of the attorney signing this document with a Dropdown answer listing all the attorneys in that Master List.



Source = Folios

Folios (page 124) are "storage bins" where Passages can be stored and later inserted into forms when and where needed. Folios and Passages are categorized with Tags.

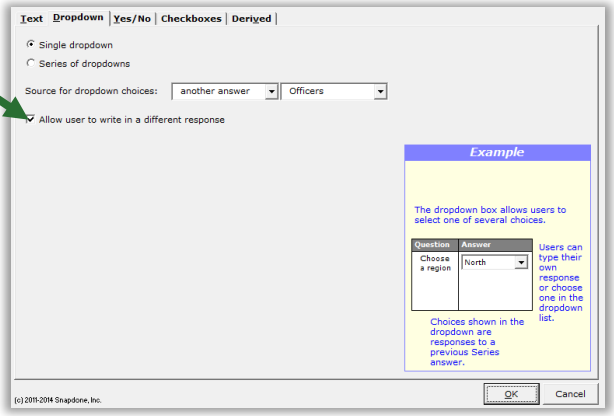
After choosing **Folios** as the dropdown source, you will choose either **Passage Names**, **Folio Names**, **Passage Tags**, or **Folio Tags** to populate the dropdown list. See Fetch Answers on page 132.



The bottom left area of the screen identifies which names or tags will be included in the dropdown list. In the example pictured here, **All** Passages contained in the **Doctors** Folio will be included.

Allow User to Write in a Different Response

When **Allow user to write in a different response** is checkmarked, users have the option of typing their own response instead of selecting one from the dropdown list.

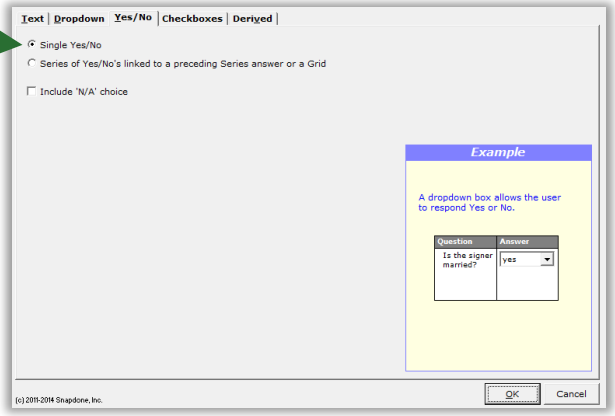


Yes/No Answers

Yes/No answers allow the form user to respond **yes** or **no** (and sometimes **n/a**).

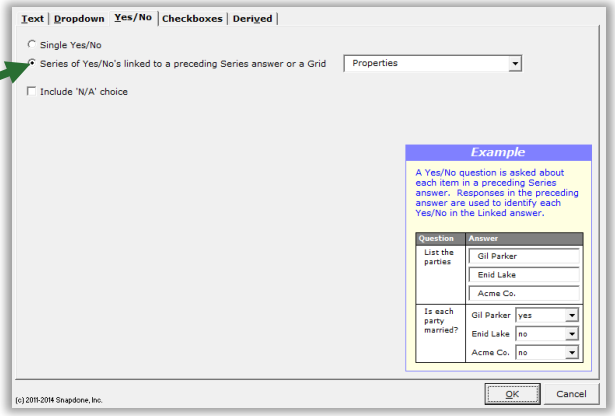
Single/Series

Select **Single Yes/No** when you are asking for a single yes/no response ("Is the property for sale?").



If the form includes another series answer, you have the option to choose **Series of Yes/No's linked to a preceding series answer or a Grid**. This asks for a yes/no response regarding each item in the other answer.

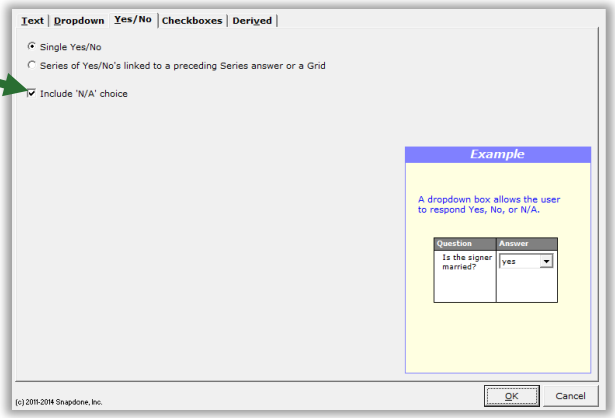
For example, the first question in your form might ask for a list of properties (a series answer). The second could ask whether each of those properties is zoned for commercial use (a series of Yes/No's).



Note: Creating a series of Yes/No's this way is "old technology." You will usually want to use Grids instead (page 15).

Include 'N/A' Choice

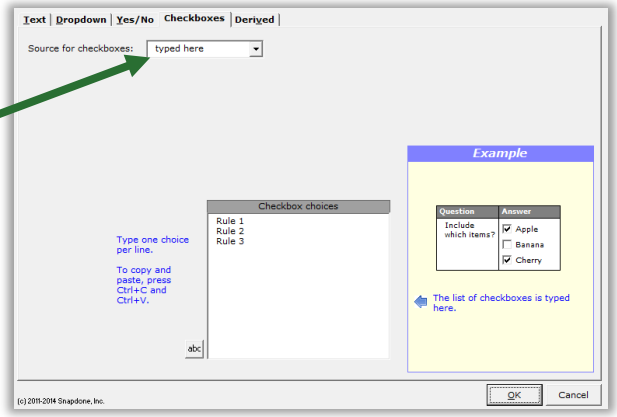
When **Include 'N/A' choice** is checkmarked, users have the option of responding **n/a** instead of **yes** or **no**. (N/A stands for "not applicable.")



Checkboxes Answers

Checkboxes answers allow the form user to check or uncheck a series of labeled checkboxes.

The series of checkboxes is drawn from one of four sources: **typed here**, **another answer**, **Master List**, or **Folios**. See page 10 for details about the four sources.

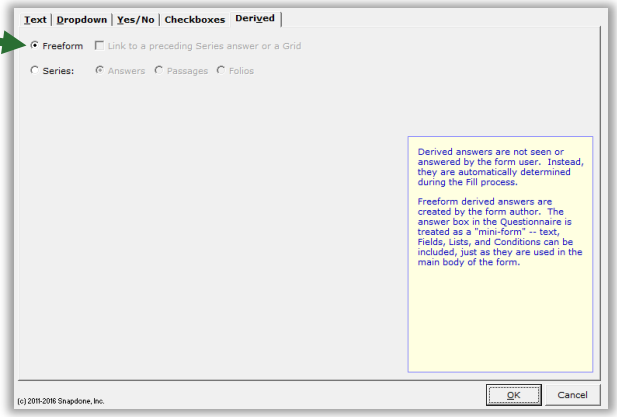


Derived Answers

Derived answers automatically process other answers (and sometimes Folios) to create new answers without any further input from the form user. For example, if another answer provides the signer's birthdate, then a Derived answer could perform a calculation to determine the signer's age.

Freeform

In a **Freeform** Derived answer, the answer box becomes the form author's private workspace to perform complex calculations behind the scenes. This is useful for:



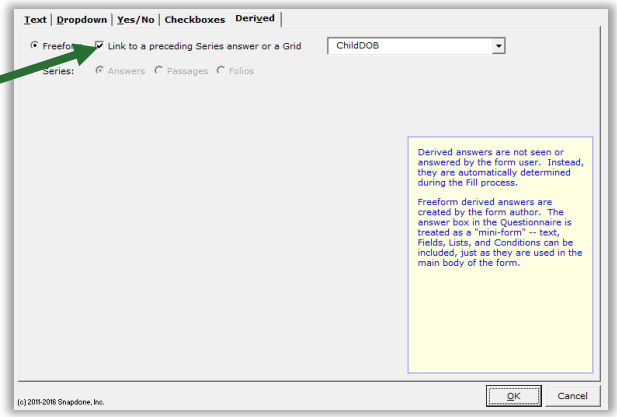
Conditions based on the results of math formulae, date offsets, or other Conditions. Given a person's birthdate, a Derived answer can use date and math functions to calculate the person's age. That age can then be used as the basis for conditional text in the form that refers to the person as either an adult or a minor.

Improved readability. If the complexity of a particular passage makes a form difficult to read, it can be tucked away in a Derived answer out of the form user's view.

Faster processing. Use a Derived answer to perform complex calculations once instead of repeatedly. For example, given a list of shareholders and the number of shares held by each, **Dox**/**DB**/**AwD** is able to determine the name of the largest shareholder. If that name appears many times in the form, put the calculation in a Derived answer with the label **LargestSH**, then use **{LargestSH}** Fields wherever needed in the form, rather than repeating the whole calculation each time the name occurs.

Use any combination of text, Fields, Lists, and Conditions in the answer box of a freeform Derived answer. Lesson 16 on page 93 uses a *whole bunch* of Derived answers.

Freeform linked: If the form includes a series answer, you have the option of linking this answer to it: select **Link to a preceding series answer or a Grid**, and select the other answer.

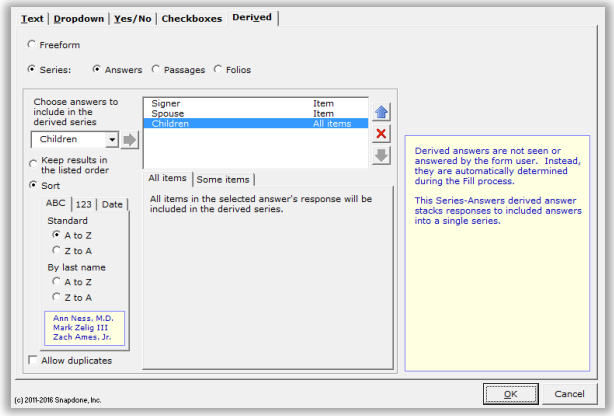


You can even chain-link answers. For example, the first question in your form might ask for a list of children (a series answer). The second question could be a linked answer that asks for each child's birthdate (a linked series). And the third question could be a derived answer that uses the second answer to calculate each child's age (linked Derived).

Note: linked answers are "old technology." You will usually want to use Grids instead (page 15).

Series of Answers

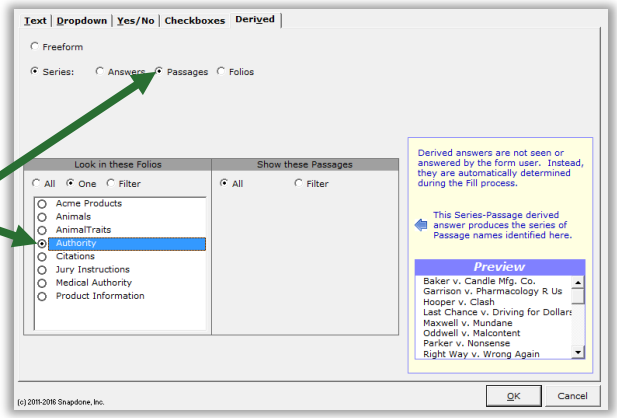
You can also create a Derived answer that is a series of other answers. Think of it as a bucket into which you toss other answers to create a new series. The other answers may themselves be series answers, and you may filter them to include only some of the items they contain. The resulting Derived series can be sorted alphabetically, numerically, or by date.



Derived series answers are enormously powerful and flexible. See Lesson 13 on page 79.

Series of Passages or Folios

If you have created any Folios (page 124), a Derived answer can also be used to generate a list of Passages or Folios.



The bottom left area of the screen identifies what will be included. In the example pictured here, the list is composed of **Passages**, and the Passages included are the ones contained in the **Authority** Folio.

The resulting Derived answer can be used to create Fields, Lists, and Conditions throughout the form just as if it were an ordinary series answer.

Hiding Derived Answers

Since Derived answers work automatically in the background, they should be hidden from form users to avoid confusion: after you've finished creating the form, click **Row/Column**, **Show/Hide** to hide all Derived answers. If you need to revise the form later, click the same button again to make everything visible.

Grids

Grids appear under the main Questionnaire and supplement it. They are composed of a whole collection of linked series answers, with each answer occupying a column.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**
DateSign	Date of signing?	12/29/2012

List all the parties:

Grid

Name	**Street**	**City**	**State**	**Zip**
Terry Porter	555 Main Street	Seattle	Washington	98101
Garth Blinth	123 Sycamore Lane	Chicago	Illinois	50103
Eva Roette	868 Meridian Drive	Houston	Texas	76023

To add a Grid, click **Questionnaire**, **Grid**, **Add**, and enter the number of columns desired. (Up to 63 columns are allowed, but you would have to use a *very small font!*)

To remove a Grid, put the cursor anywhere in the Grid and click **Questionnaire**, **Grid**, **Remove**. Or rearrange the order of multiple Grids by placing the cursor in one and clicking **Questionnaire**, **Grid**, **Move Up** or **Move Down**.

Grids can contain Smart Answers. When you apply a Smart Answer in a Grid, you are choosing a Smart Answer for an *entire column.* To add a Smart Answer, put the cursor anywhere in the desired column and click **Smart Answer**. You will see that some options in the Smart Answer screen are not available for Grids. For example, the *first* column of a Grid can only be a **Text** or **Dropdown** answer.

Converting linked answers to Grids. Linked answers are "old technology" and are generally inferior to Grids. If you previously created a linked answer and have now decided you'd like to use a Grid instead, **Dox**/**DB**/**AwD** can automatically perform that conversion for you. Put the cursor in the answer box of the series answer to which other answers are linked, and click **Tools**, **Convert to Grid**. The series answer and its linked answers are removed from the top part of the Questionnaire, and a brand new Grid is created.

To practice with Grids, see Lesson 12 on page 71.

Default Answers

To save typing for the form user, provide default answers whenever practical. For example, if your office is in Washington State, you can partially pre-fill the Questionnaire with this answer. The form user can always type a different state if necessary.

Doxserá (c) 2016 Snapdone, Inc.		
Label	**Question**	**Answer**
SigName	What's the signer's name?	
SigState	What's the signer's state of residence?	Washington

Fields

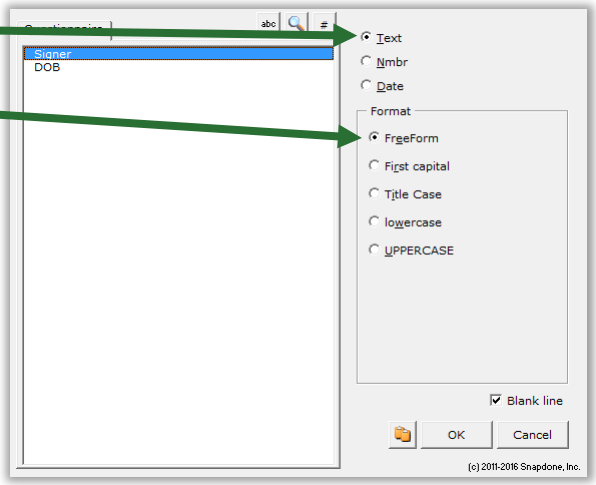
Authors

Several types of Fields are available when creating forms. Each type has its own set of formatting options, so a single answer in the Questionnaire can be used many different ways throughout the form. To insert a Field in a form, put the cursor in the document where the Field belongs and click **Field**.

Text Fields

Text Fields are the most common.

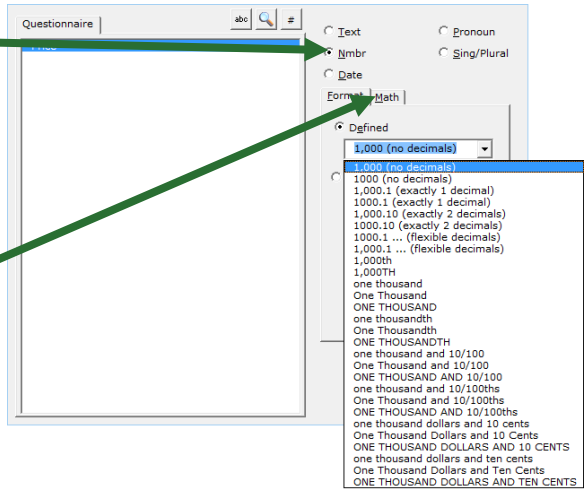
Choose **FreeForm** to capitalize text exactly as it was typed in the Questionnaire, or one of the other formats to enforce a particular type of capitalization: **First capital**, **Title Case**, **lowercase**, or **UPPERCASE**.



Number Fields

Nmbr Fields can be formatted as numerals with or without commas and with various numbers of decimal places, as ordinals (1st, 2nd, 3rd …), or as upper- or lowercase words (one, Two, THREE), ordinal words (first, second, third), or dollar amounts in several formats (Three Dollars and 38 Cents).

Number Fields can be further automated with math functions. Click **Math** to open the Math screen (page 87).

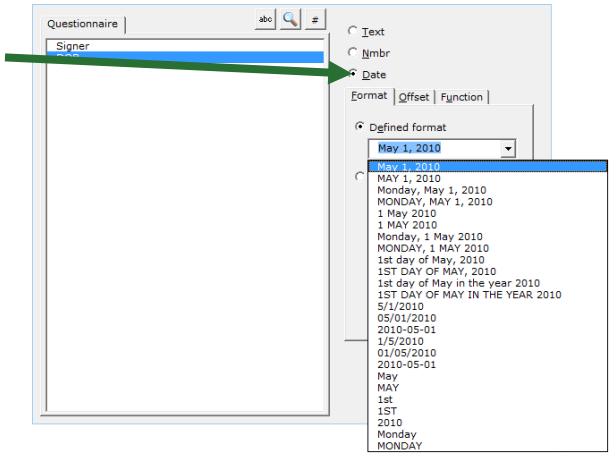


International number formats. Number formats shown in this screen always use periods for decimals and commas for digit grouping (for example, **1,000.00**). But when the form is Filled, punctuation will be reversed when necessary to conform to your computer operating system settings (for example, **1.000,00**).

Date Fields

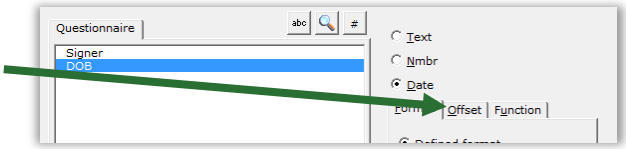
Date Format

Date Fields can also be formatted many ways, using both words and numbers. You may even choose to display only a portion of the date that's typed into a Questionnaire, like the name of the month or day of the week.



Date Offset

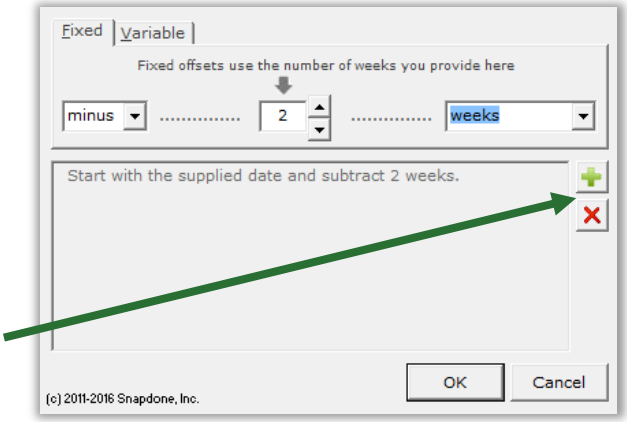
Date Fields can be further manipulated with Date Offsets. Click **Offset** to open the Date Offset screen.



In this screen, related dates can be calculated from a date typed in the Questionnaire by the form user.

For example, the Questionnaire might ask for a trial date, and the form could calculate several other dates, such as a meeting scheduled two weeks before trial, or a phone call scheduled for the weekday preceding trial.

Date Offsets are built one sentence at a time. Click ✚ to add another sentence, or ✕ to remove the last one.



Lesson 1: Fixed Date Offset

- Date Field (page 17)
- Date Offset (page 17)

Given a trial date, this form calculates two related dates.

1 Create the Questionnaire

a Type or copy/paste this paragraph into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

a Your trial date is Tuesday, April 25, 2017. Interrogatory answers must be filed 20 business days before trial, on March 28, 2017. Please have your draft answers to me no later than the preceding Friday, March 24, 2017.

b

Doxserá (c) 2011-2016 Snapdone, Inc.

Label	Question	Answer
TrialDate	What's the trial date?	

2 Add a basic Field

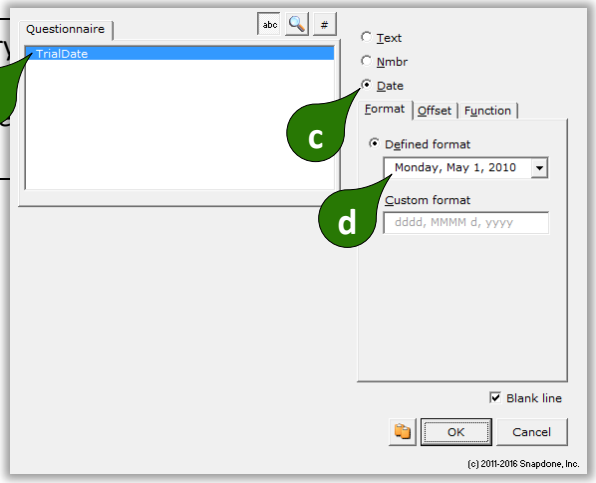
a Select **Tuesday, April 25, 2017** and click **Field**

b Select the **TrialDate** answer

c Select the **Date** Field type

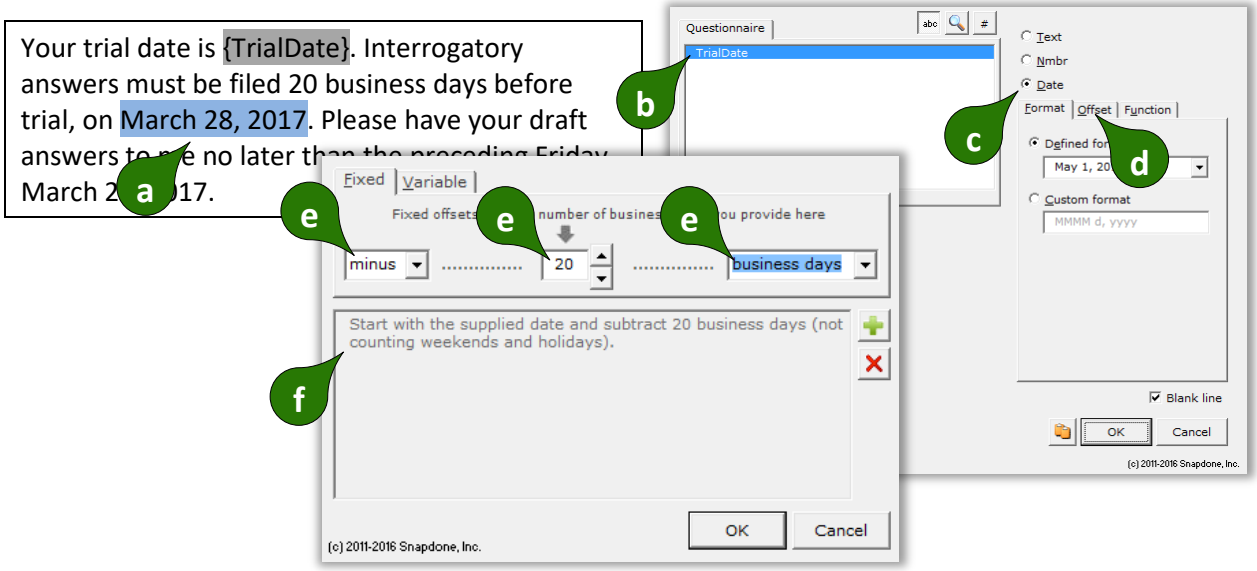
d Select the **Monday, May 1, 2010** format and click **OK**

Your trial date is Tuesday, April 25, 2017. Interrogatory answers must be filed 20 business days before trial, on March 28, 2017. Please have your draft answers to me no later than the preceding Friday, March 24, 2017.



3 Add the first Date Offset Field

- **a** Select **March 28, 2017** and click **Field**
- **b** Select the **TrialDate** answer
- **c** Select the **Date** Field type
- **d** Click **Offset** to open the Date Offset screen
- **e** Select the offset **minus 20 business days**
- **f** Read the description to make sure it's correct, then click **OK** to close the Date Offset screen and **OK** again to close the Field screen

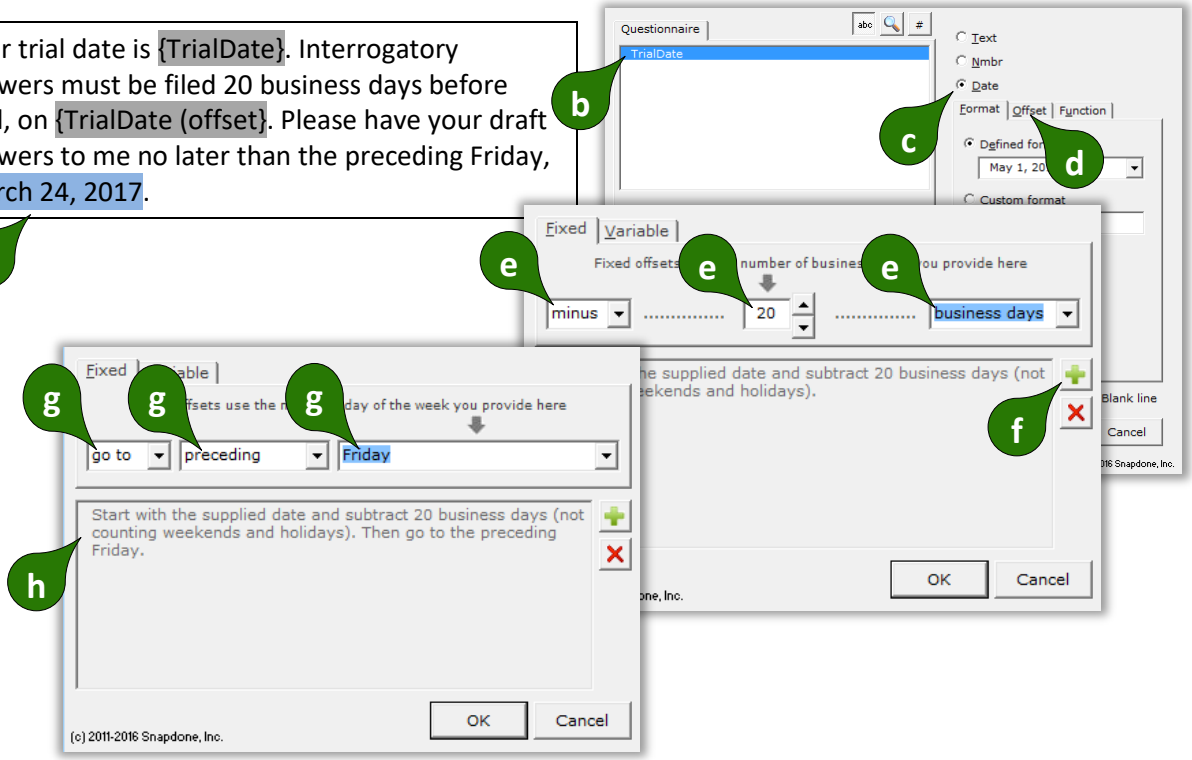


Date Offsets are built one sentence at a time. Most require only one sentence like the one above, but the one below uses two sentences to come up with the Friday preceding the day 20 business days before trial.

4 Add the second Date Offset Field

- **a** Select **March 24, 2017** and click **Field**
- **b** Select the **TrialDate** answer
- **c** Select the **Date** Field type
- **d** Click **Offset** to open the Date Offset screen
- **e** Select the offset **minus 20 business days** for the first sentence
- **f** Click + to add a second sentence
- **g** Select the offset **go to preceding Friday** for the second sentence
- **h** Read the description to make sure it's correct, then click **OK** to close the Date Offset screen and **OK** again to close the Field screen

Your trial date is {TrialDate}. Interrogatory answers must be filed 20 business days before trial, on {TrialDate (offset}. Please have your draft answers to me no later than the preceding Friday, March 24, 2017.



THE PAYOFF

The form user answers just one question, and the form calculates all three dates.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**
TrialDate	What's the trial date?	7/12/2017

Your trial date is Wednesday, July 12, 2017. Interrogatory answers must be filed 20 business days before trial, on June 13, 2017. Please have your draft answers to me no later than the preceding Friday, June 9, 2017.

Lesson 2: Variable Date Offset

- Number Field (page 16)
- Date Field (page 17)
- Date Offset (page 17)

Given a commencement date and length of term, this form calculates a termination date.

1 Create the Questionnaire

a Type or copy/paste this paragraph into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

Lessor leases the Premises to Lessee for a Term of 3 years, beginning on March 11, 2017, and ending on March 11, 2020.

a

b

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**
Date	What is the lease commencement date?	
Term	How many years long is the term?	

2 Add basic Fields

a Select **3** and click **Field**

b Select the **Term** answer

c Select the **Nmbr** Field type and click **OK**

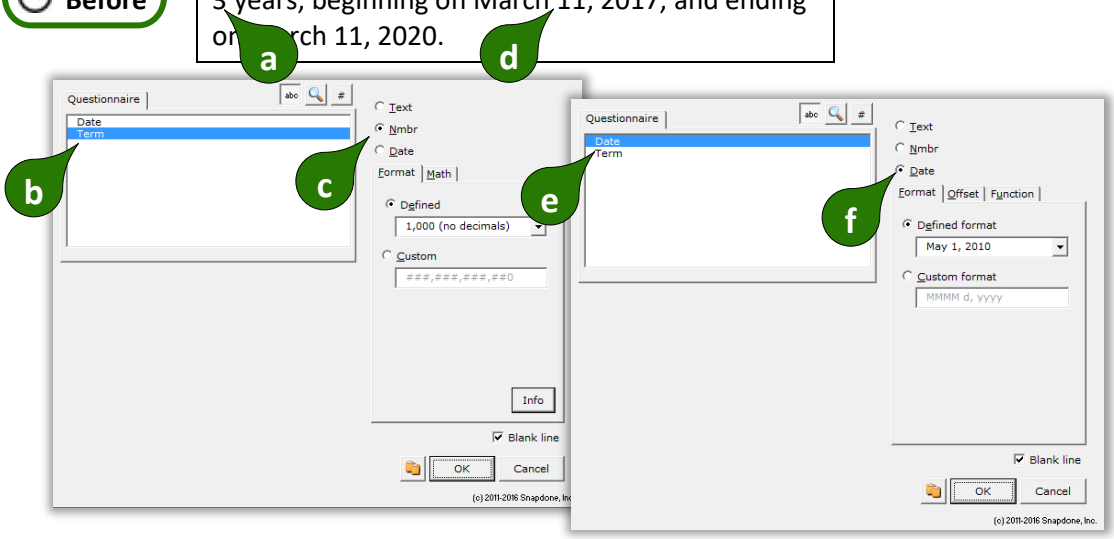
d Select **March 11, 2017** and click **Field**

e Select the **Date** answer

f Select the **Date** Field type and click **OK**

Before

Lessor leases the Premises to Lessee for a Term of 3 years, beginning on March 11, 2017, and ending on March 11, 2020.

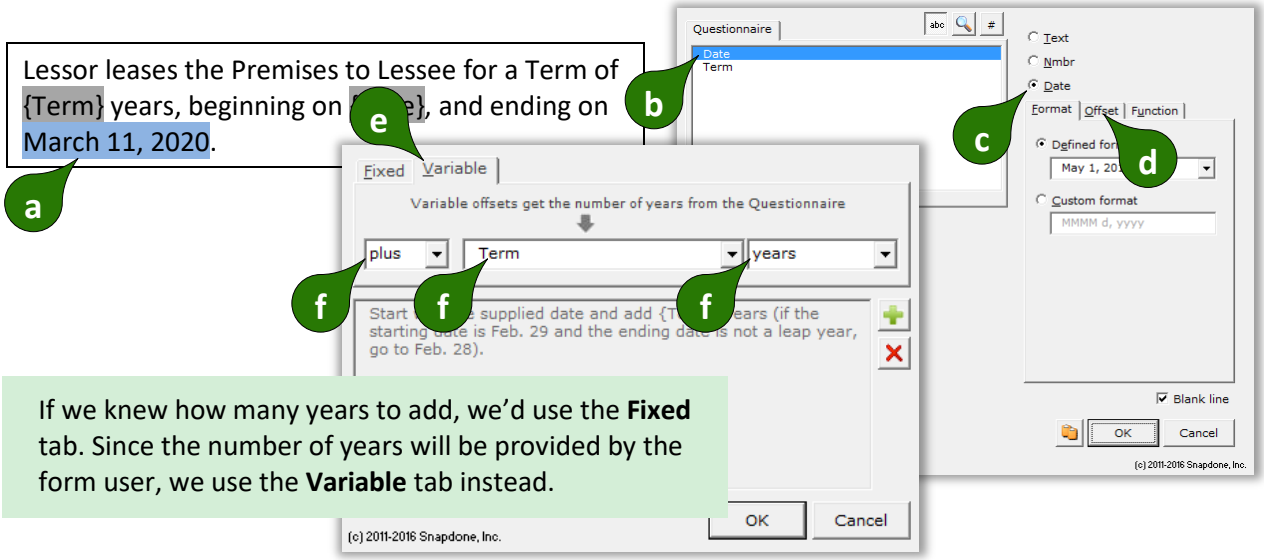


After

Lessor leases the Premises to Lessee for a Term of {Term} years, beginning on {Date}, and ending on March 11, 2020.

3 Add Date Offset Field

- **a** Select **March 11, 2020** and click **Field**
- **b** Select the **Date** answer
- **c** Select the **Date** Field type
- **d** Click **Offset** to open the Date Offset screen
- **e** Click the **Variable** tab
- **f** Select the offset **plus Term years**, click **OK** to close the Date Offset screen, and **OK** again to close the Field screen



THE PAYOFF

Two responses in the Questionnaire are used to calculate a third item in the finished document.

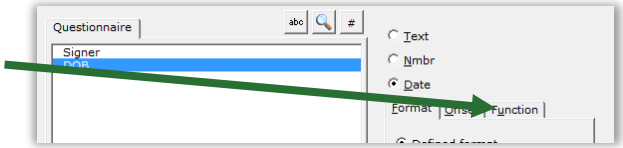
Doxserá (c) 2011-2016 Snapdone, Inc.

Label	Question	Answer
Date	What is the lease commencement date?	8/6/2017
Term	How many years long is the term?	5

Lessor leases the Premises to Lessee for a Term of 5 years, beginning on August 6, 2017, and ending on August 6, 2022.

Date Function

Dox/**DB**/**AwD** includes several date functions that are not offsets: **FirstDate**, **LastDate**, **Now**, and others To use one of these functions, click **Function** to open the Math screen (as in Lesson 16 on page 93).

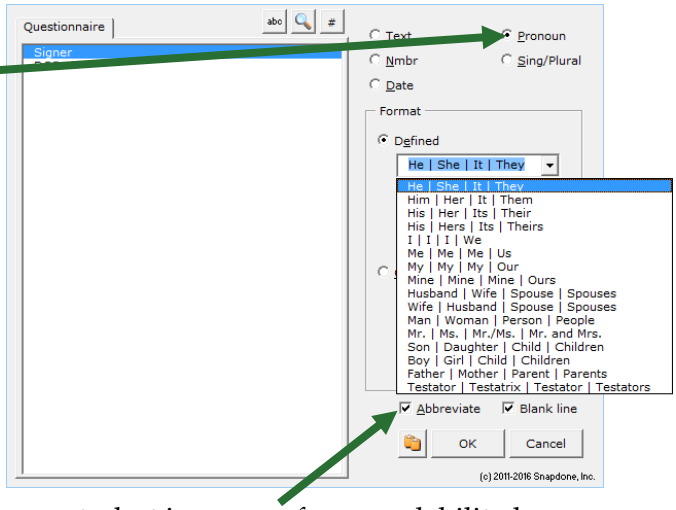


You may assign both a function and an offset to a Date Field. The offset will be applied to the result of the function.

Pronoun Fields (Got Grammar?)

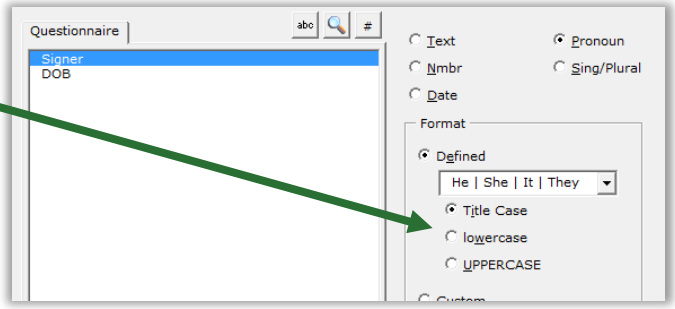
Pronoun Fields automatically choose the proper word based on a Pronoun answer – words like **he/she** and **him/her**. They also automate gender words like **husband/wife**, **son/daughter**, and **testator/testatrix**.

If you don't see the Pronoun option in this screen, add a pronoun to this answer box (page 9).



The **Abbreviate** checkbox has no effect on finished documents, but improves form readability by shortening four-part Fields (like **he/she/it/they** or **husband/wife/spouse/spouses**) to show only two parts (**he/she** or **husband/wife**). If you prefer to see all four parts displayed, uncheck this checkbox.

As you create Pronoun Fields, select **Title Case** for pronouns at the beginning of a sentence, **lowercase** for pronouns in the middle of a sentence, or **UPPERCASE** when needed.

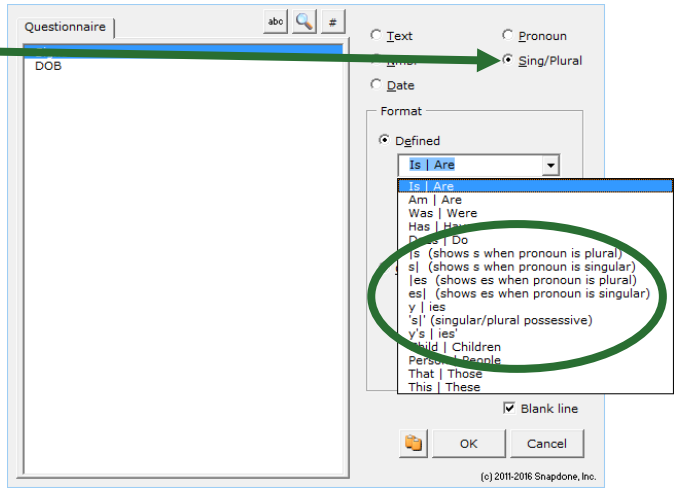


Singular/Plural Fields

Sing/Plural Fields automatically choose the proper word depending on (1) which pronoun is selected in a Pronoun answer; or (2) how many items appear in a series answer.

If you don't see the **Sing/Plural** option in this screen, change this question's answer to a Pronoun answer or series answer.

Word pairs like **is/are** and **was/were** are great when a specific word is needed, but the options shown here and described below are flexible enough to be used in lots of different situations.



|s (shows s when pronoun is plural): Use this Field to tack an **s** onto the end of any word (usually a noun) when the answer is plural – for example, after **defendant** in this form.

The defendant{s} allege{s} as follows…

s| (shows s when pronoun is singular): Use this Field to tack an **s** onto the end of any word (usually a verb) when the answer is singular – for example, after **allege** in this form.

|es (shows es when pronoun is plural): Use this Field to tack an **es** onto the end of any word (usually a noun) when the answer is plural – for example, after **breach** in this form.

es| (shows es when pronoun is singular): Use this Field to tack an **es** onto the end of any word (usually a verb) when the answer is singular – for example, after **reach** in this form.

When the contract breach{es} reach{es} a value of…

y|ies: Use this Field at the end of words that end with **Y**, as shown here.

These facts are agreed upon by the above-named part{ies}.

s|' (singular/plural possessive): Use this Field at the end of a word to form a possessive. The example shown here uses two Singular/Plural Fields – the first shows an **s** when the pronoun is plural, and the second shows either **'** or **'s**. This results in **The defendant's rights** when there is one defendant, or **The defendants' rights** for multiple defendants.

The defendant{s}{'s} rights have been violated.

y's|ies': Use this Field at the end of words that end with **Y** to form a possessive, as shown here.

The above-named part{ies'} rights have been violated.

Lesson 3: Pronouns and Plurals

- Text-with-Pronoun answer (page 9)
- Dropdown answer (page 9)
- Pronoun Field (page 23)
- Singular/Plural Field (page 23)

Using only a few questions, you'll fully automate a paragraph to produce perfect grammar in all situations.

This deceptively short sample form is chock full of opportunities to try out Pronoun answers, Pronoun Fields, and Singular/Plural Fields. When we're done, the form will adapt to every possible combination of plaintiff(s) and defendant(s) – whomever and whatever – with automatic and flawless grammatical shifts.

1 Create the Questionnaire

a Type or copy/paste this paragraph into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

Bob Lobb ("Plaintiff") hereby requests that the Court grant his motion and rule against AAA Company ("Defendant"). The Defendant has produced no evidence, so it should be required to pay Plaintiff's attorney fees.

a

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Label	Question	Answer
Client	Name of client?	
ClientParty	What party is the client?	
Opponent	Name of opponent?	
OppParty	What party is the opponent?	

b

2 Create with-pronoun Smart Answers

a Put the cursor in the **Client** answer box and click **Smart Answer**

b Checkmark **With pronoun** and click **OK**

c Do the same for the **Opponent** answer box

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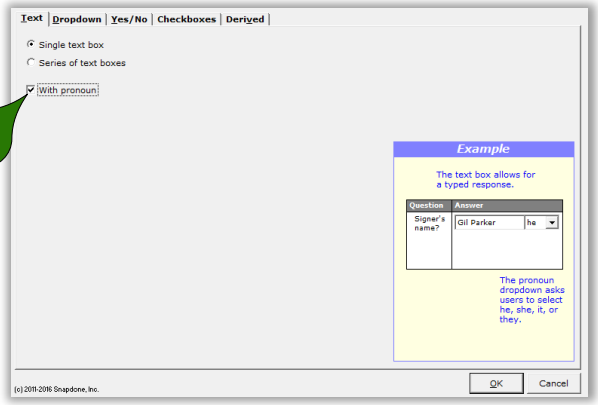
Label	Question	Answer
Client	Name of client?	
ClientParty	What party is the client?	
Opponent	Name of opponent?	
OppParty	What party is the oppone	

a

c

b



3 Create dropdown Smart Answers

- **a** Put the cursor in the **ClientParty** answer box and click **Smart Answer**
- **b** Click the **Dropdown** Field type
- **c** Select the **typed here** source
- **d** Type **Plaintiff** and **Defendant** on separate lines and click **OK**
- **e** Do the same for the **OppParty** answer box

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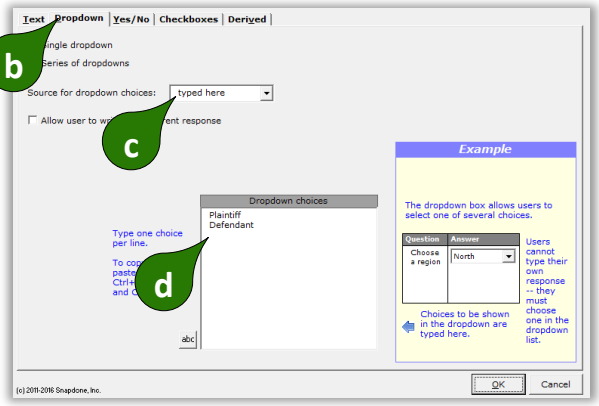
Label	Question	Answer
Client	Name of client?	[??] [??]
ClientParty	What party is the client?	
Opponent	Name of opponent?	[??] [??]
OppParty	What party is the opponent?	



4 Add basic Fields

- **a** Select **Bob Lobb** and click **Field**, select the **Client** answer, and click **OK**
- **b** Select **Plaintiff** and click **Field**, select the **ClientParty** answer, and click **OK** (twice)
- **c** Select **AAA Company** and click **Field**, select the **Opponent** answer, and click **OK**
- **d** Select **Defendant** and click **Field**, select the **OppParty** answer, and click **OK** (twice)

Before

Bob Lobb ("Plaintiff") here requests that the Court grant his motion and rule against AAA Company ("Defendant"). The Defendant has produced no evidence, so it should be required to pay Plaintiff's attorney fees.

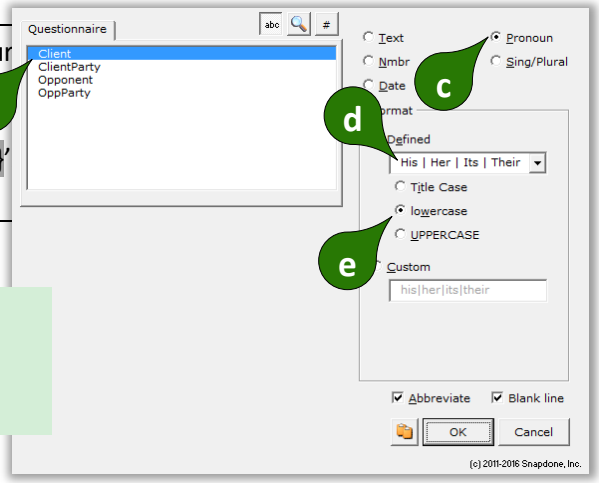
After

{Client} ("{ClientParty}") hereby requests that the Court grant his motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so it should be required to pay {ClientParty}'s attorney fees.

5 Add a pronoun for the client

- **a** Select **his** and click **Field**
- **b** Select the **Client** answer
- **c** Select the **Pronoun** Field type
- **d** Select the format **His|Her|Its|Their**
- **e** Select **lowercase** and click **OK**

{Client} ("{ClientParty}") hereby requests that the Cour
grant his motion and rule against {Opponent}
("{OppParty}"). The {OppParty} has produced no
evidence, so it should be required to pay {ClientParty}'
attorney fees.

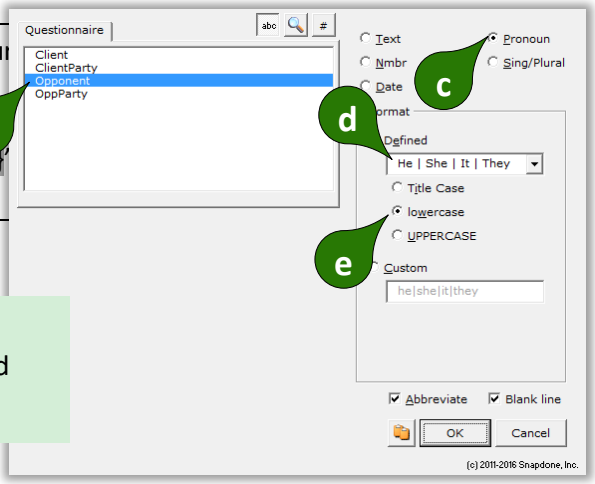


The word **his** in the original document is a pronoun related to the **Client** answer.

6 Add a pronoun for the opponent

- **a** Select **it** and click **Field**
- **b** Select the **Opponent** answer
- **c** Select the **Pronoun** Field type
- **d** Select the format **He|She|It|They**
- **e** Select **lowercase** and click **OK**

{Client} ("{ClientParty}") hereby requests that the Cour
grant {his|her} motion and rule against {Opponent}
("{OppParty}"). The {OppParty} has produced no
evidence, so it should be required to pay {ClientParty}'
attorney fees.



The word **it** in the original document is a pronoun related to the **Opponent** answer.

We want this form to give flawless results when our client is a married couple too. Note the differences in these two phrases:

Bertrand Loopin ("Plaintiff") hereby requests…

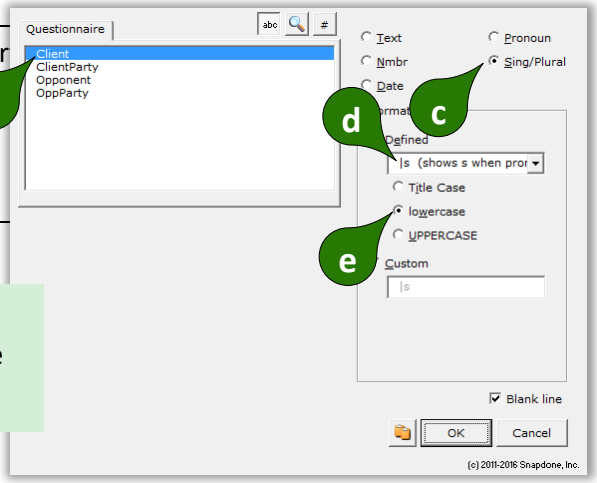
Bertrand and Agnes Loopin ("Plaintiffs") hereby request…

When there is one client, an **s** appears at the end of the verb **requests**. When there are two clients, an **s** appears at the end of the noun **Plaintiffs**. We'll use singular/plural Fields to handle this requirement.

7 Add a singular/plural Field

- **a** Put the cursor immediately after **{ClientParty}** and click **Field**
- **b** Select the **Client** answer
- **c** Select the **Sing/Plural** Field type
- **d** Select the format **|s (shows s when pronoun is plural)**
- **e** Select **lowercase** and click **OK**

{Client} ("{ClientParty}") hereby requests that the Court grant {his|her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so {he|she} should be required to pay {ClientParty}'s attorney fees.



The **shows s when pronoun is plural** Field is usually used at the end of a <u>noun</u>.

8 Add a second singular/plural Field

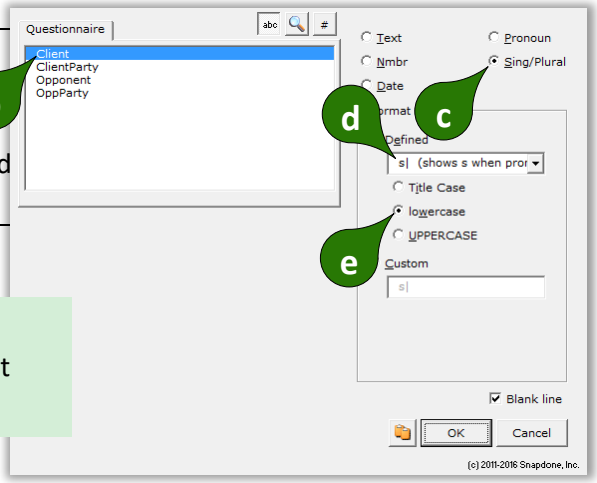
- **a** Select the **{s}** Field you just created and copy it with **Ctrl+C**
- **b** Put the cursor between **{ClientParty}** and **'s** then paste with **Ctrl+V**

{Client} ("{ClientParty}{s}") hereby requests that the Court grant {his|her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so {he|she} should be required to pay {ClientParty}'s attorney fees.

9 Add a third singular/plural Field

- **a** Select the **s** at the end of **requests** and click **Field**
- **b** Select the **Client** answer
- **c** Select the **Sing/Plural** Field type
- **d** Select the format **s| (shows s when pronoun is singular)**
- **e** Select **lowercase** and click **OK**

{Client} ("{ClientParty}{s}") hereby requests that the Court grant {his|her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so {he|she} should be required to pay {ClientParty}{s}'s attorney fees.

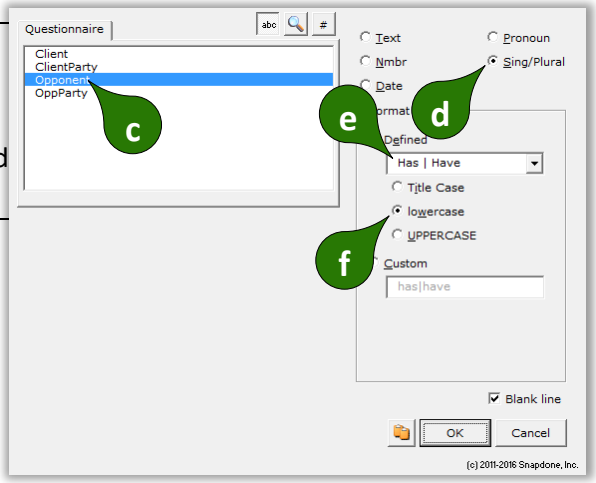


The **shows s when pronoun is singular** Field is usually used at the end of a <u>verb</u>.

10 Add three more singular/plural Fields

- **a** Use the methods from Steps **7** and **8** to add singular/plural Fields after each **{OppParty}** Field (you will select **Opponent** instead of **Client** in the Field screen)
- **b** Select **has** and click **Field**
- **c** Select the **Opponent** answer
- **d** Select the **Sing/Plural** Field type
- **e** Select the format **Has|Have**
- **f** Select **lowercase** and click **OK**

{Client} ("{ClientParty}{s}") hereby request{s} that the Court grant {his|her} motion and rule against {Opponent} ("{OppParty}"). The {OppParty} has produced no evidence, so {he|she} should be required to pay {ClientParty}{s}'s attorney fees.

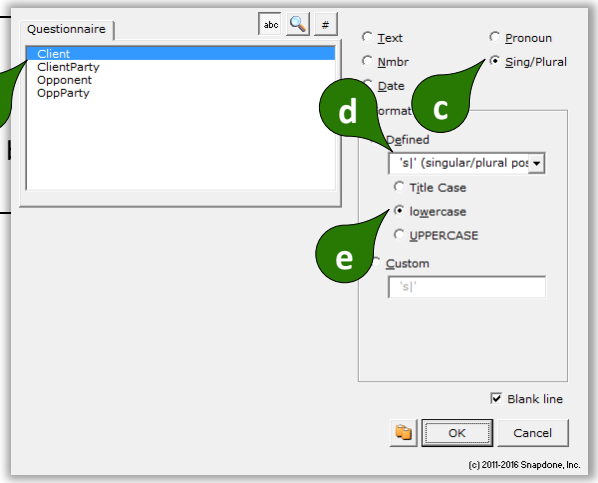


Almost done! Notice the **'s** near the end of the form: **pay {ClientParty}{s}'s attorney fees**. When there is only one client, proper spelling requires an apostrophe and an **s**. But when there are two clients, only the apostrophe is required. We'll add one more singular/plural Field to handle this quandary.

11 Add the last singular/plural field

- **a** Select both the apostrophe and the **s** and click **Field**
- **b** Select the **Client** answer
- **c** Select the **Sing/Plural** Field type
- **d** Select the format **'s|' (singular/plural possessive)**
- **e** Select **lowercase** and click **OK**

{Client} ("{ClientParty}{s}") hereby request{s} that the Court grant {his|her} motion and rule against {Opponent} ("{OppParty}{s}"). The {OppParty}{s} {has|have} produced no evidence, so {he|she} should be required to pay {ClientParty}{s}'s attorney fees.



The form is complete. Be reassured that this is an unusually high concentration of Fields. Most forms you create will not contain 15 Fields in 2 sentences – this example was contrived to pack lots of stuff into a small space just to give you a good workout.

> {Client} ("{ClientParty}{s}") hereby request{s} that the Court grant {his|her} motion and rule against {Opponent} ("{OppParty}{s}"). The {OppParty}{s} {has|have} produced no evidence, so {he|she} should be required to pay {ClientParty}{s}{'s} attorney fees.

Readability. You may have noticed that the five {s} Fields are visually indistinguishable, even though they give different results – two add **s** when the Client is plural, one adds **s** when the Client is singular, and two add **s** when the Opponent is plural. **Dox**/**DB**/**AwD** abbreviates Fields this way to keep the form readable, but you can always see the full details of any Field (and make changes if needed) by placing the cursor in the Field and clicking **Field**.

THE PAYOFF

Now that you've taken such care building this superbly intelligent form, look at how much time it saves the form user. The charts below show the end result when the Questionnaire is filled in several different ways. Note (1) how very little info is asked of the form user; and (2) the impeccably letter-perfect end results.

Here the client/plaintiff is a human and the opponent/defendant is a business entity.

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Label	Question	Answer
Client	Name of client?	Betty Fisk [she]
ClientParty	What party is the client?	Plaintiff
Opponent	Name of opponent?	AAA Company [it]
OppParty	What party is the opponent?	Defendant

Betty Fisk ("Plaintiff") hereby requests that the Court grant her motion and rule against AAA Company ("Defendant"). The Defendant has produced no evidence, so it should be required to pay Plaintiff's attorney fees.

What if the client/defendant is a company and the opponent/plaintiff is a married couple?

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Label	Question	Answer
Client	Name of client?	Generics, Inc. [it]
ClientParty	What party is the client?	Defendant
Opponent	Name of opponent?	Bob and Kay Roe [they]
OppParty	What party is the opponent?	Plaintiff

Generics, Inc. ("Defendant") hereby requests that the Court grant its motion and rule against Bob and Kay Roe ("Plaintiffs"). The Plaintiffs have produced no evidence, so they should be required to pay Defendant's attorney fees.

Here the client/plaintiff is a whole mess of people, and the opponent/defendant is one person.

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Label	Question	Answer
Client	Name of client?	John Does #1 through 38 [they]
ClientParty	What party is the client?	Plaintiff
Opponent	Name of opponent?	Herb Chappe [he]
OppParty	What party is the opponent?	Defendant

John Does #1 through 38 ("Plaintiffs") hereby request that the Court grant their motion and rule against Herb Chappe ("Defendant"). The Defendant has produced no evidence, so he should be required to pay Plaintiffs' attorney fees.

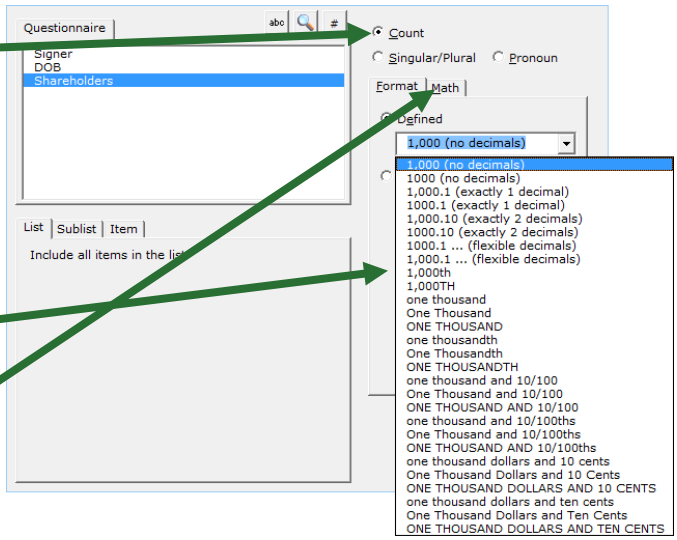
Count Fields

Count Fields refer to the number of items in a series answer ("The company has three shareholders" or "I have one child").

If you don't see the **Count** option in this screen, change the answer for this question to a series answer.

Count Fields can be formatted as numbers, words, or ordinals, in upper- or lowercase.

Count Fields can be further automated with math functions. Click **Math** to open the Math screen (page 87).

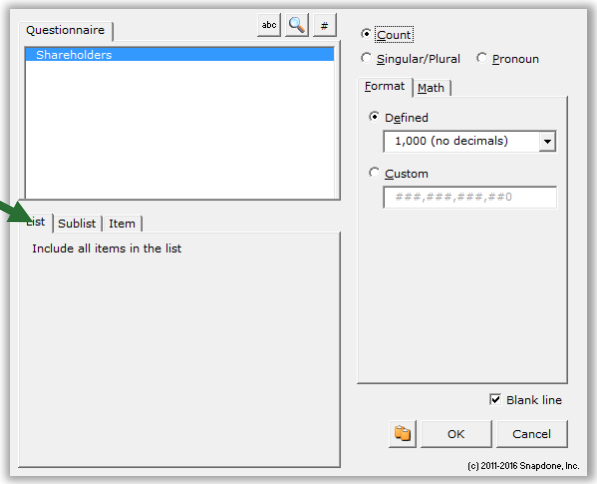


Fields for Series Answers

When a Field is inserted for a series answer, three additional choices appear:

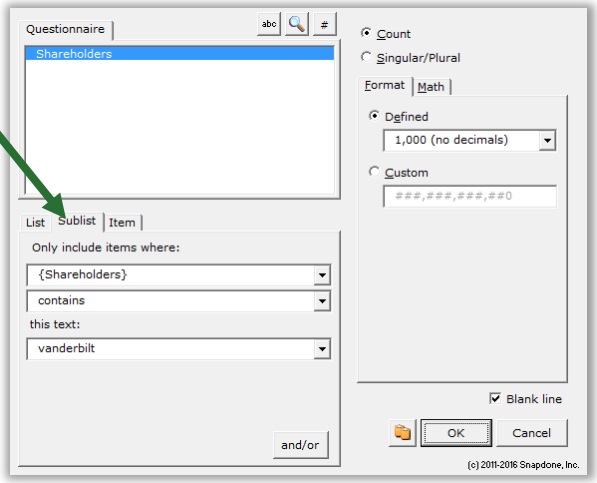
List inserts a Field that gives the total number of items in the answer.

The Field shown here gives the total number of people in the **Shareholders** series answer.



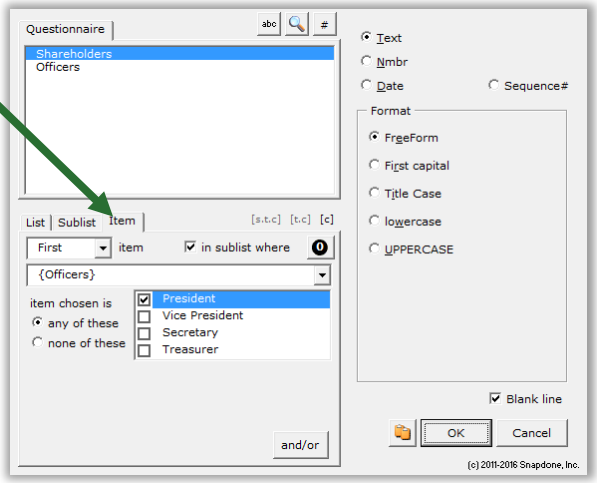
Sublist allows you to specify a subset of items from the series provided by the form user.

The Field shown here counts the number of people in the **Shareholders** answer who are named **Vanderbilt**.



Item inserts a particular item in the series – the first item, last item, 8th item, etc. You can also select an item that meets particular criteria: the first item in a series of names that contains **John**; the 2nd item in a series of numbers that's more than **100**; the last item in a series of dates that's earlier than **1/1/2000**; etc.

The Field shown here provides the name of the **First** person in the **Shareholders** answer who is designated **President** in the **Officers** answer.

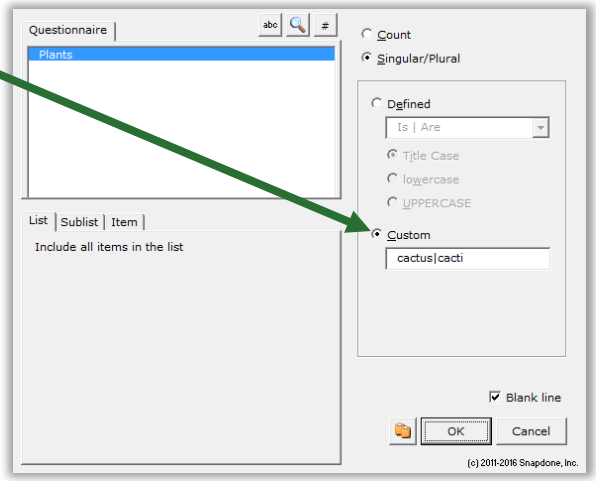


Custom Field Formats

On rare occasions, you may want to create your own custom Field format. For example, plurals of most words can be created with the built-in Singular/Plural Fields described above, but you could also create your own custom Singular/Plural Fields for unusual word pairs like **index|indices** or **cactus|cacti**.

To create a custom Field, select **Custom** and edit the contents of the box.

This example shows a custom Singular/Plural Field, but you may also create custom formats for other Field types.



Modifying Fields

You can go back and make changes to an existing Field at any time. Just put the cursor in the Field and click **Field** to return to the Field building screen.

Conditions

Authors

Conditional Text

Conditions are the intelligent worker bees of the form world. The form author makes some decisions about how a form should work, then adds Conditions to automatically implement those decisions each time the form is used.

Use Conditions to include or exclude text depending on the form user's response to a question in the Questionnaire. The conditional text can be a word, phrase, paragraph, or even multiple paragraphs or

pages. Lots of Conditions throughout the form can be tied to one answer in the Questionnaire, causing the finished document to change dramatically based on a single mouse click by the form user.

For example, consider this form.

If the signer is not married, then the second sentence should be removed. In other words, the second sentence is *conditional,* depending on whether or not the answer to the **Spouse** question is empty.

My name is {Signer}. My spouse's name is {Spouse}.

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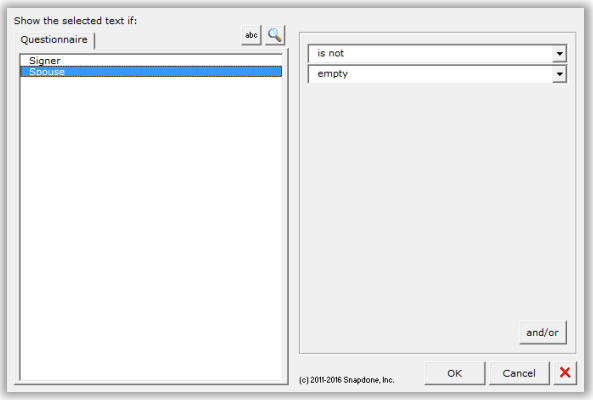
Label	**Question**	**Answer**
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

To accomplish that, you would:

1. Select the conditional text (the second sentence).
2. Click **Condition** and choose the conditions under which the sentence should be included.



Lesson 4 Lesson 4 Lesson 4

Lesson 4: Conditions

In this form, you want different language to appear in the finished document, depending on the user's answers in the Questionnaire.

1 Create the Questionnaire

a Type or copy/paste this paragraph into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

a

My name is Terry Vance. My spouse's name is Gena Vance.

b

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**
Signer	What's the signer's name?	
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

2 Add Fields

- **a** Select **Terry Vance**
  - click **Field**, select the **Signer** answer, and click **OK**
- **b** Select **Gena Vance**
  - click **Field**, select the **Spouse** answer, and click **OK**
- **c** Type an alternate sentence at the end of the paragraph: **I am not married.**

Before

a b c

My name is Terry Vance. My spouse's name is Gena Vance.

After

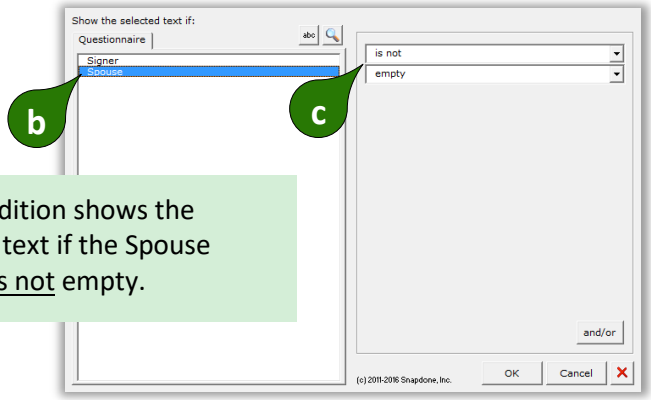
My name is {Signer}. My spouse's name is {Spouse}. I am not married.

3 Add the first Condition

- **a** Select the second sentence (including the space at the end) and click **Condition**
- **b** Select the **Spouse** answer
- **c** Select the condition **is not empty** and click **OK**

My name is {Signer}. My spouse's name is {Spouse}. I am not married.

a



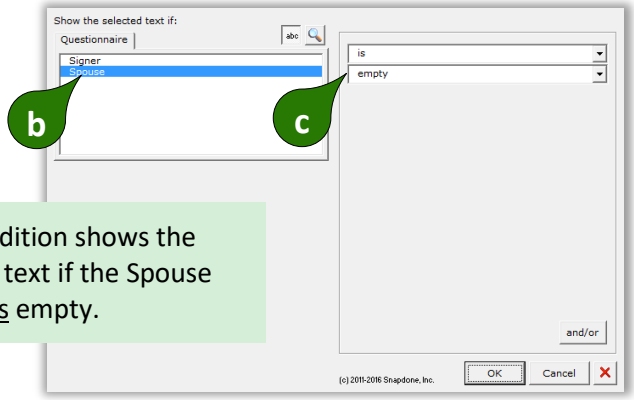
This Condition shows the selected text if the Spouse answer is not empty.

4 Add an opposing Condition

- **a** Select the last sentence and click **Condition**
- **b** Select the **Spouse** answer
- **c** Select the condition **is empty** and click **OK**

My name is {Signer}. {if:My spouse's name is {Spouse}. }I am not married.

a



This Condition shows the selected text if the Spouse answer is empty.

Lesson 4 Lesson 4 Lesson 4

THE PAYOFF

When a Spouse is typed, the result looks like this:

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Label	**Question**	**Answer**
Signer	What's the signer's name?	Betty Miller
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	Jerome Miller

My name is Betty Miller.
My spouse's name is Jerome Miller.

And when the Spouse answer is left empty, the result looks like this:

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**
Signer	What's the signer's name?	Betty Miller
Spouse	What's the signer's spouse's name? (Leave blank if unmarried.)	

My name is Betty Miller.
I am not married.

Lesson 4 Lesson 4 Lesson 4

Condition Markers

Take a close look at the markers (colored red here) that bracket this conditional sentence:

{if:My spouse's name is {Spouse}. }

Begin Condition Marker — Conditional Text — End-of-Condition Marker

Everything between the markers is removed from the finished document unless the Condition is true. To review (or make changes to) the Condition, put the cursor in the beginning marker and click **Condition**.

> **Conditions Are Flexible.** If you later change your mind about the material within a Condition, feel free to edit it. Type or copy new material between the two markers, or move the markers themselves – there's no need to recreate the Condition from scratch. To remove a Condition, be sure to delete both the beginning marker and its corresponding end marker.

Nested Conditions

Conditions can be *nested* inside other Conditions, but not *overlapped*. That means the innermost end-of-Condition marker marks the end of the innermost Condition.

{if:I live in {if:{City}, }{State}. }

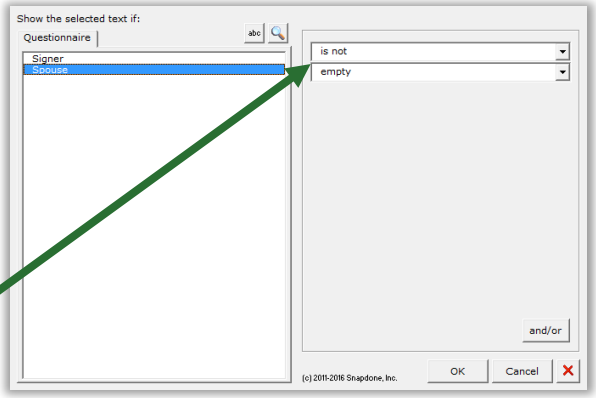
Outer Condition — Inner Condition — End of Inner Condition — End of Outer Condition

If the outer Condition is false, all of its contents are removed from the finished document – including the entire inner Condition, regardless of whether the inner Condition is true or false.

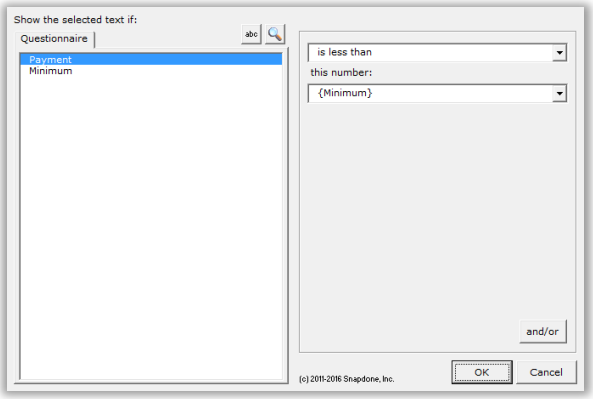
Conditions and Answer Types

The appearance of the Condition screen varies depending on what type of answer is selected.

Conditions based on Text answers can depend on all sorts of criteria. The one shown here checks to see if the answer is empty, but you can create Conditions that check whether an answer starts with **Fred**, ends with **x**, contains **pop**, or equals **Lilith**; whether it's a number less than **38** or more than **16**, whether it's a date earlier or later than **May 11, 2012**; whether it's alphabetically before **possum** or after **flan**. Take a minute to experiment with the two dropdown boxes to see the endless possibilities.

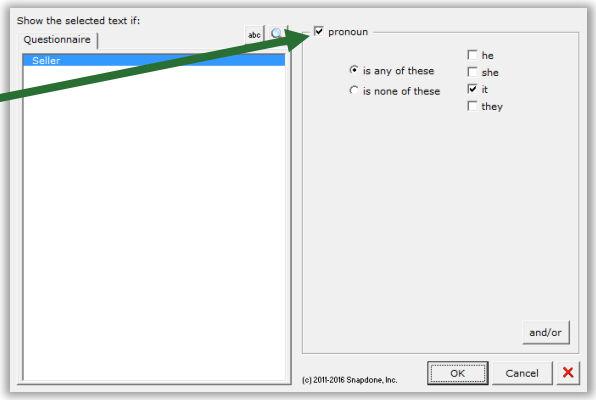


You can even compare two answers. In this example, the selected text will be included in the finished document only if the answer to the **Payment** question is less than the answer to the **Minimum** question.



Conditions based on Text-with-Pronoun answers include all the possibilities of Text answers shown above, plus additional options that appear when **pronoun** is checkmarked.

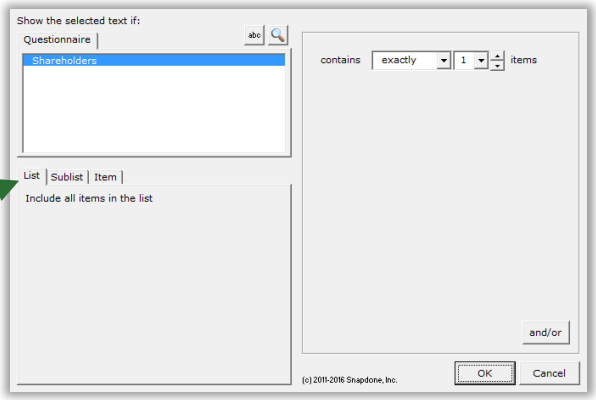
In this example, the selected text will be included in the finished document only if the **Seller** is an **it** (a corporate entity, rather than an individual).



Conditions based on series answers present all sorts of possibilities, depending on whether **List**, **Sublist**, or **Item** is chosen.

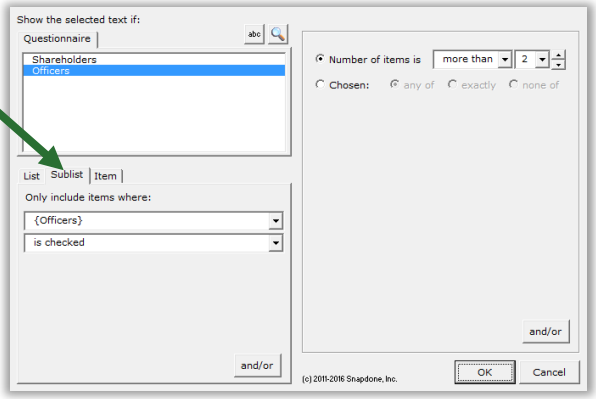
List: This Condition depends on the total number of items in the Shareholders answer.

The selected text will be included in the finished document only if there is **exactly 1** shareholder.



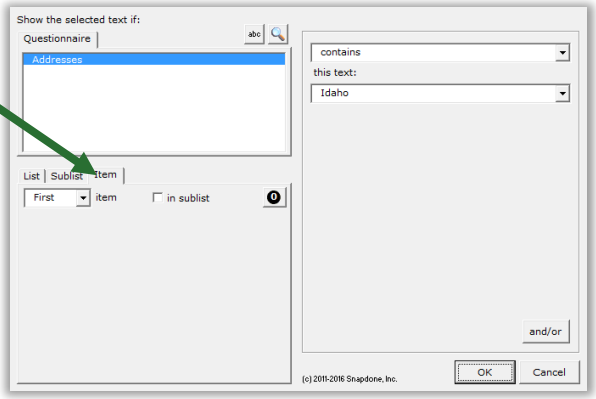
Sublist: This Condition looks at a Sublist of items in the **Officers** answer: only the items that are checkmarked.

The selected text will be included in the finished document only if **more than 2** items in the answer are checkmarked.



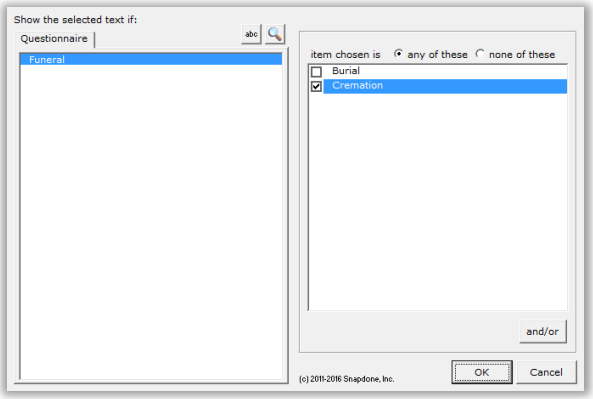
Item: This Condition depends on the contents of a particular item in the **Addresses** answer.

The selected text will be included in the finished document only if the **First** address contains **Idaho**.



Conditions based on Dropdown answers depend on the choice that is made.

In this example, the selected text will be included in the finished document only if **Cremation** is chosen in the **Funeral** answer.

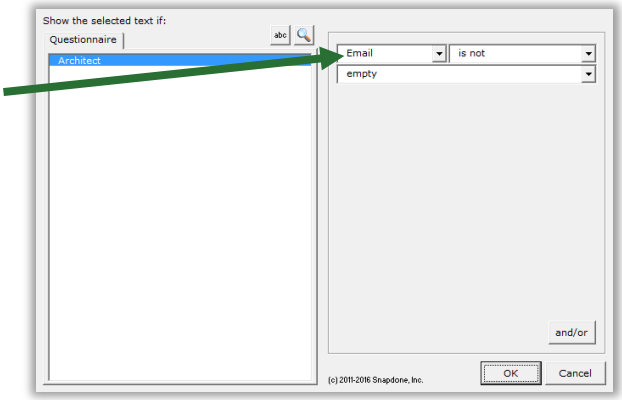


Master List columns and Folio Facts:

If the answer uses a Master List (page 119) as the source of its choices, you can select any column of the Master List to be used in the Condition.

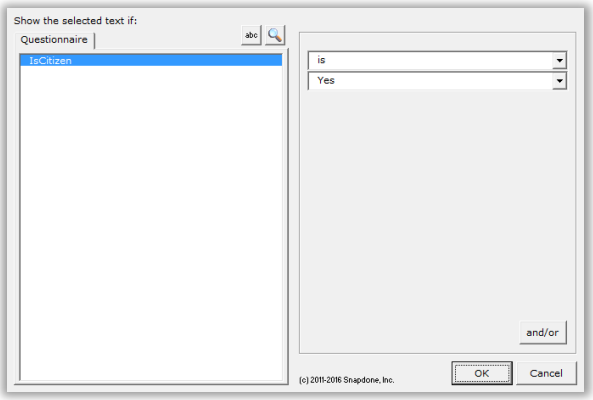
In this example, the selected text will be included in the finished document only if an email address for the selected architect is provided in the **Email** column of the Master List of architects.

Similarly, if the answer uses a Folio (page 124) as the source of its choices, you can select any Folio Fact (page 128) to be used in the Condition.



Conditions based on Yes/No answers depend on the form user's response.

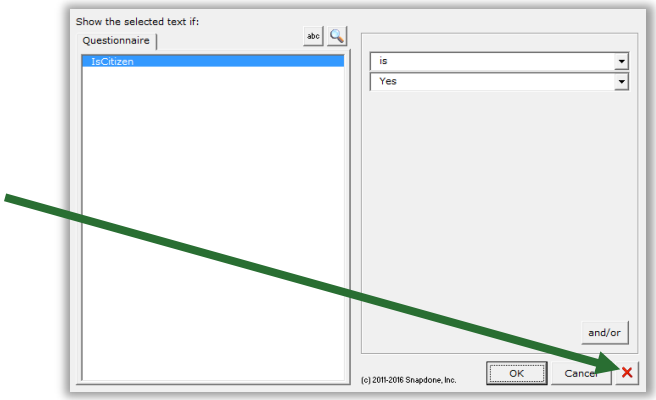
In this example, the selected text will be included in the finished document only if the answer to the **IsCitizen** question is **Yes**.



Modifying or Removing Conditions

You can go back and modify an existing Condition at any time. Just put the cursor in the **{if:** marker and click **Condition** to return to the Condition building screen.

While in this screen, you can click ✕ to remove the Condition from the form, leaving its contents intact. In other words, click ✕ to remove the **{if:** marker from the beginning of the conditional text and the **}** marker from the end of the conditional text without removing anything between the markers.



Compound Conditions (a/k/a Boolean Conditions)

A single Condition may depend on multiple criteria.

> **Example 1:** The sentence **You qualify for free shipping** might be used only when (1) the total order is over $100; **AND** (2) the shipping address is in Oregon.
>
> **Example 2:** The sentence **Please call us at your earliest convenience to avoid debt collection proceedings** might be used only when (1) the account is more than 3 months overdue; **OR** (2) the amount due is greater than $1,000.

The AND and OR above are sometimes called Boolean operators. **Dox/DB/AwD** includes three Boolean operators:

AND: For the Condition to be true, both parts must be true.

OR: For the Condition to be true, one or both parts must be true.

XOR (exclusive or): For the Condition to be true, exactly one part must be true, and the other false.

Lesson 5: This AND That

- Compound Condition (page 38)

In this form, Oregon residents qualify for free shipping on orders over $100.

1 Create the Questionnaire

a Type or copy/paste this paragraph into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

a

Your order totaling $___ will be shipped to ___. You qualify for free shipping!

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Label	Question	Answer
OrderTotal	What's the total order amount?	
ShipAddr	What's the shipping address?	

b

2 Add Fields

a Select the first blank line

- click **Field**, select the **OrderTotal** answer, and click **OK**

b Select the second blank line

- click **Field**, select the **ShipAddr** answer, and click **OK**

Before

a b

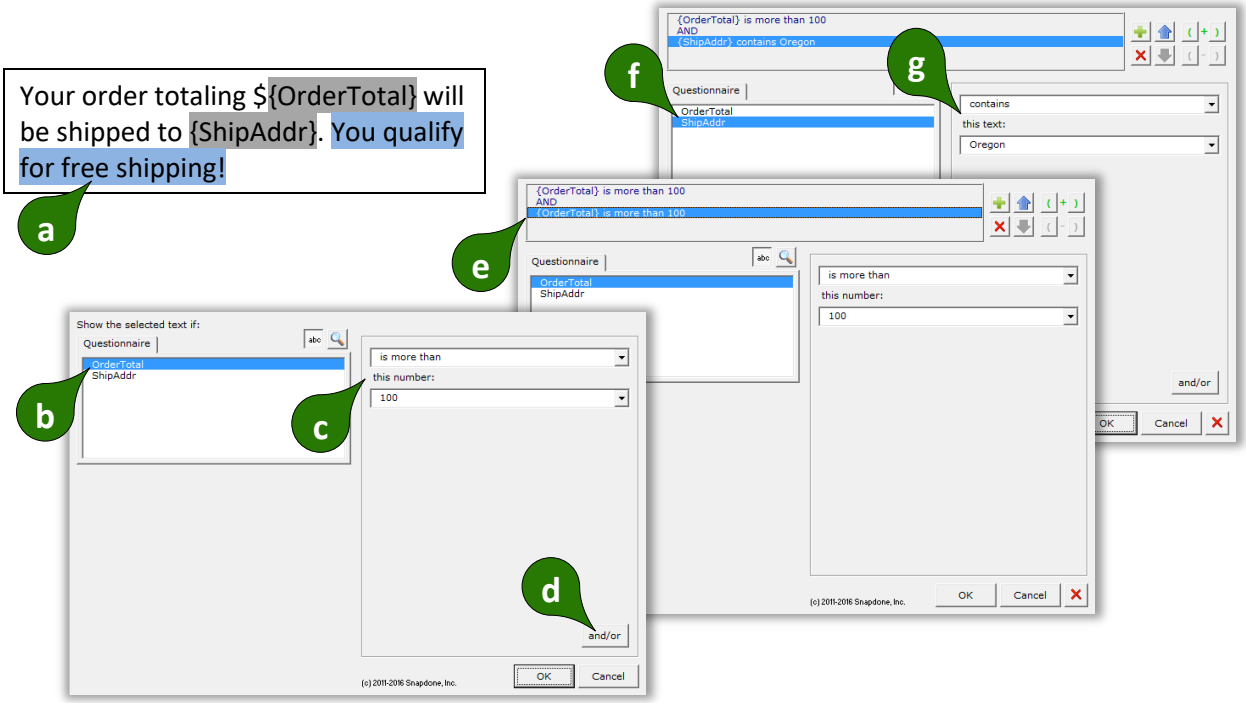
Your order totaling $___ will be shipped to ___. You qualify for free shipping!

After

Your order totaling ${OrderTotal} will be shipped to {ShipAddr}. You qualify for free shipping!

3 Add the compound Condition

- **a** Select the second sentence and click **Condition**
- **b** Select the **OrderTotal** answer
- **c** Select the condition **is more than 100**
- **d** Click **and/or** to add a second part to the condition
- **e** The top part of the screen shows a second part of the condition has been added, connected with **AND**. Select the second part.
- **f** Select the **ShipAddr** answer
- **g** Select the condition **contains Oregon** and click **OK**



THE PAYOFF

The second sentence only appears in the finished document when the total order is more than $100 AND the shipping address is in Oregon.

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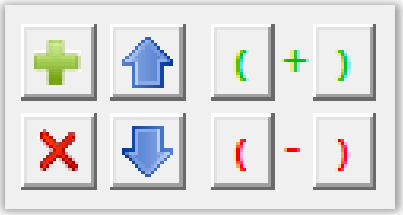
Label	**Question**	**Answer**
Total	What's the total order amount?	75
Addr	What's the shipping address?	111 Main Street, Bend, Oregon 88888

Your order totaling $75 will be shipped to 111 Main Street, Bend, Oregon 88888.

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**
Total	What's the total order amount?	250
Addr	What's the shipping address?	111 Main Street, Bend, Oregon 88888

Your order totaling $250 will be shipped to 111 Main Street, Bend, Oregon 88888. You qualify for free shipping!

Compound Conditions can be extraordinarily complex, with any number of parts connected with **AND**, **OR**, and **XOR**. To manage all those parts, use the buttons in the top-right part of the screen:



Add or remove parts with ✚ and ✕.

Move the selected part up or down with ⬆⬇.

Control the order in which parts are evaluated by **( )** adding or **( )** removing parentheses.

Parentheses in Compound Conditions

Remember back in math class when you learned that **(1 + 2) x 3** is different than **1 + (2 x 3)**? The parentheses control the order of operations. So the first statement results in **9**, while the second statement results in **7**.

Well, parentheses are just as important in compound Conditions. For example, suppose we wanted to find everyone with a first name of either Jon or John, and a last name of Smith. This statement would work perfectly, finding John Smith and Jon Smith:

(<u>{FirstName} is John</u> **OR** <u>{FirstName} is Jon</u>) **AND** {LastName} is Smith

But this statement would fail, finding John Jones, John Adams, John Smith, and Jon Smith:

<u>{FirstName} is John</u> **OR** (<u>{FirstName} is Jon</u> **AND** {LastName} is Smith)

Use parentheses to control the order of operations in compound Conditions whenever there's any potential for error.

Lesson 6 Lesson 6 Lesson 6

Lesson 6: This OR That AND the Other Thing

- Yes/No answer (page 12)
- Compound Condition (page 38)
- Parentheses in Conditions (page 41)

This Payment Due notice uses a stern tone for large or late balances, unless the client is a Preferred Customer.

1 Create the Questionnaire

a Type or copy/paste this paragraph into a blank document

- Click **Questionnaire**, ✚ **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

a

Please submit the total amount due within two weeks or we will commence legal action. The total amount due is $_____. Please submit a minimum payment of half that amount at your earliest convenience.

b

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Label	Question	Answer
TotalDue	What's the total amount due?	
Over90	Is the last payment over 90 days old?	
IsPC	Is this a Preferred Customer?	

2 Create Smart Answers

- **a** Put the cursor in the **Over90** answer box
- Click **Smart Answer**
- **b** Select **Yes/No** and click **OK**
- **c** Do the same for the **IsPC** answer box

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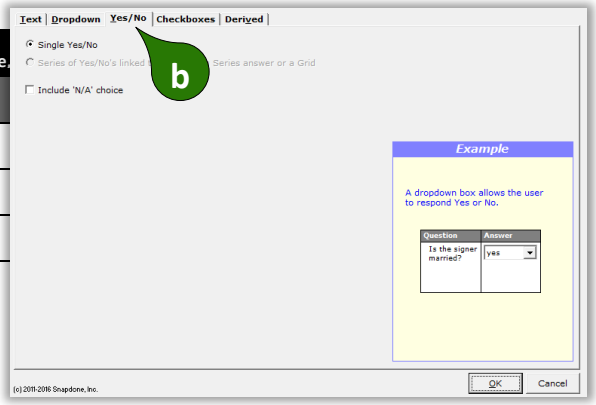
Label	Question	Answer
TotalDue	What's the total amount due?	
Over90	Is the last payment over 90 days old?	
IsPC	Is this a Preferred Customer?	



3 Add a Field

- **a** Select the blank line
- click **Field**, select the **TotalDue** answer, and click **OK**

Before

Please submit the total amount due within two weeks or we will commence legal action. The total amount due is $_____. Please submit a minimum payment of half that amount at your earliest convenience.

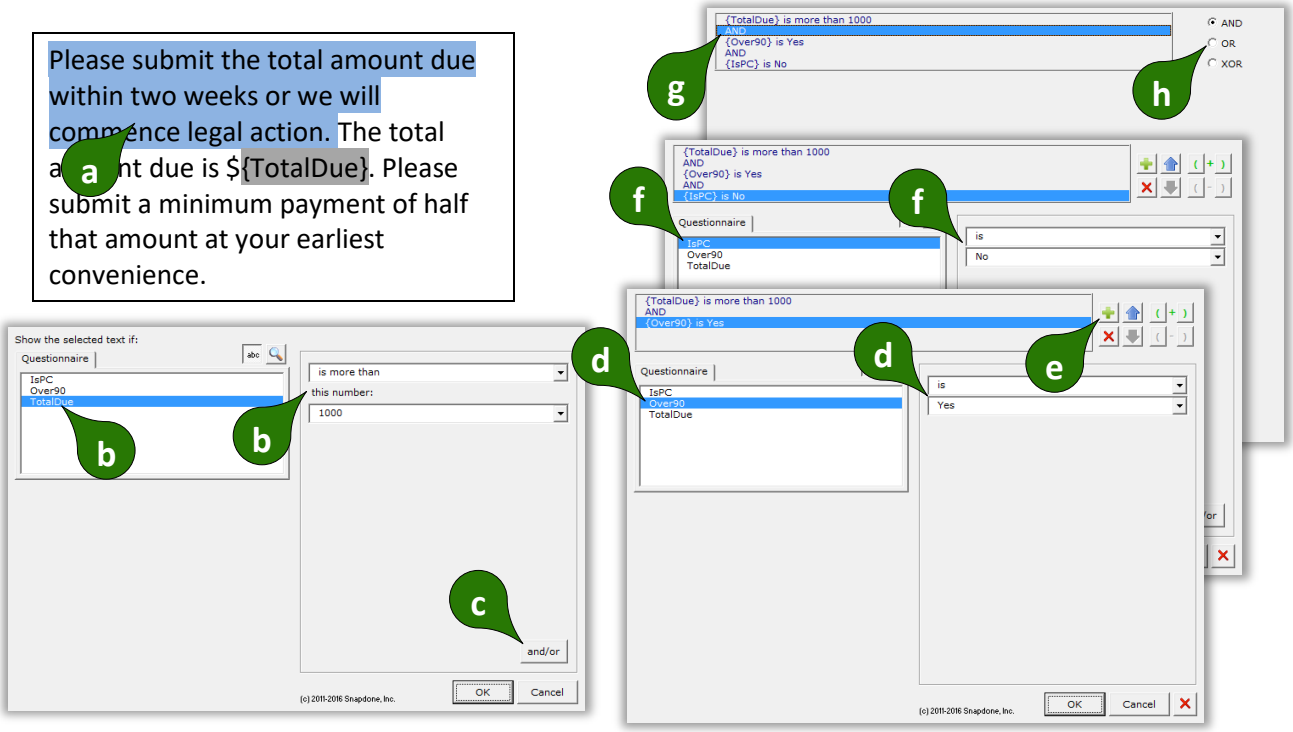
After

Please submit the total amount due within two weeks or we will commence legal action. The total amount due is ${TotalDue}. Please submit a minimum payment of half that amount at your earliest convenience.

The first sentence threatens legal action. It should appear only if the balance due is very large or very late (over $1,000 or over 90 days) AND the client is not one of our Preferred Customers.

4 Add the first Condition

- **a** Select the first sentence (including the space at the end) and click **Condition**
- **b** Select the condition **TotalDue is more than 1000**
- **c** Click **and/or** to add a second part to the condition
- **d** Select the condition **Over90 is Yes** for the second part
- **e** Click ➕ to add a third part to the condition
- **f** Select the condition **IsPC is No** for the third part
- **g** Select the **AND** operator
- **h** Select **OR** to change the operator
- Don't close this screen yet – more to come in the next step



We need to ensure that the three parts of the compound Condition are evaluated in the proper sequence. We want to determine whether or not:

(**(**{TotalDue} is more than 1000 OR {Over90} is Yes**)** AND {IsPC} is No

Note the placement of the parentheses above. They tell us that the first two parts will be evaluated first. (Is the total due more than $1,000 OR the last payment older than 90 days?) If the answer to that is true AND the third part is true (not a Preferred Customer), then the whole Condition is true.

5 Add parentheses

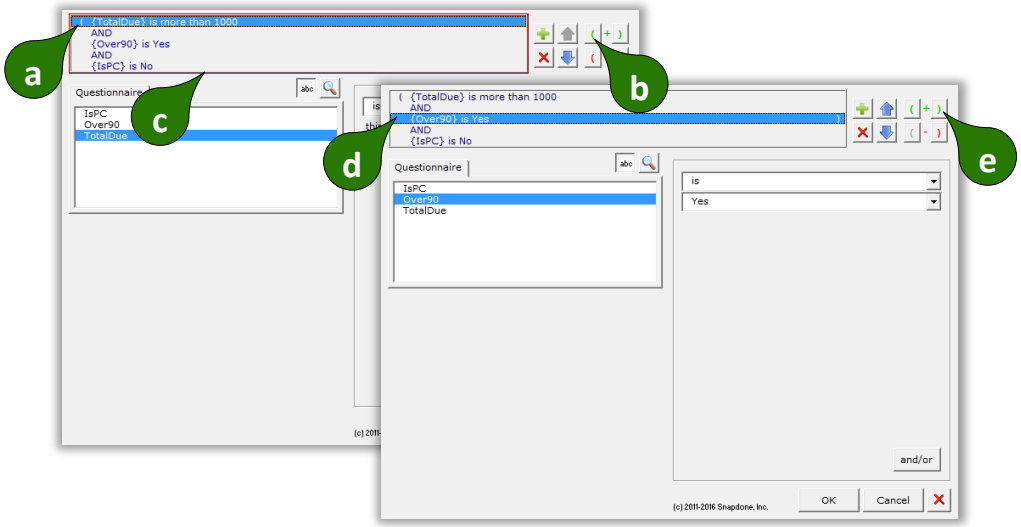
a Select the first part of the condition

b Click **(** to add a left parenthesis

c A red border warns that we don't yet have a pair of parentheses

d Select the second part of the condition

e Click **)** to add a right parenthesis, and click **OK**



The last sentence in the form should appear whenever the first sentence does not: when either (a) the balance due is small or not very late, or (b) the Client is a Preferred Customer.

({TotalDue} is less than $1,000.01 OR {Over90} is No**)** OR {IsPC} is Yes

The odd figure $1,000.01 is used so that a balance of exactly $1,000 will be included in this Condition.

6 Add the second Condition

a Select the last sentence and click **Condition**

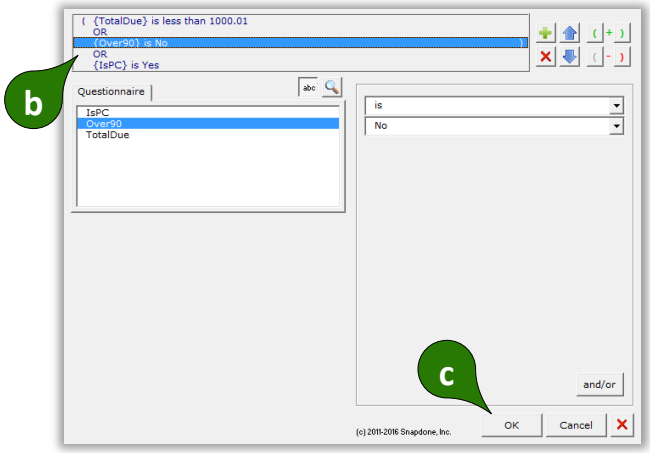
b Use the methods from Steps **4** and **5** to create this condition (note the parentheses):

({TotalDue} is less than 1000.01
OR
{Over90} is No)
OR
{IsPC} is Yes

c Click **OK**

{if:Please submit the total amount due within two weeks or we will commence legal action. }The total amount due is ${TotalDue}. Please submit a minimum payment of half that amount at your earliest convenience.

a



THE PAYOFF

The form produces two distinct outcomes. If the balance due is large or late and the client is not a Preferred Customer:

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Label	**Question**	**Answer**
TotalDue	What's the total amount due?	8,500
Over90	Is the last payment over 90 days old?	yes
IsPC	Is this a Preferred Customer?	no

Please submit the total amount due within two weeks or we will commence legal action. The total amount due is $8,500.

In all other circumstances:

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**
TotalDue	What's the total amount due?	8,500
Over90	Is the last payment over 90 days old?	yes
IsPC	Is this a Preferred Customer?	yes

The total amount due is $8,500. Please submit a minimum payment of half that amount at your earliest convenience.

Nested Conditions

Conditions can be nested inside other Conditions. You might create an agreement form in which Article III is optional, contained within one great big Condition. Within that article, several paragraphs might also be conditional, either as a group or individually. And within each of those paragraphs other

Conditions might be used to select particular sentences or words. There is no limit to how deeply Conditions may be nested.

Special Conditions

Conditional A/An

Consider this form.

The owner is a {CompanyState} corporation.

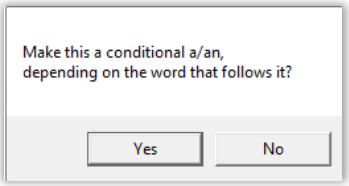
If the state is **Texas**, the resulting document looks like this – no problems.

The owner is a Texas corporation.

But if the state is **Idaho**, the resulting document looks like this. Problem! The **a** should be **an**.

The owner is a Idaho corporation.

To solve this problem, select the **a** in the form, click **Condition**, and click **Yes**.



The form now includes a conditional **{a}** code. When the form is Filled, the **{a}** will become either **a** or **an**, as needed.

{CompanyName} is {a} {CompanyState} corporation.

Conditional Period

Consider this form.

The name of the company is {CompanyName}.

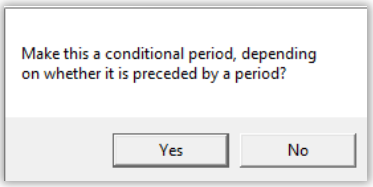
If the company is **Acme**, the resulting document looks like this – no problems.

The name of the company is Acme.

But if the company is **Acme, Inc.** the resulting document looks like this. Problem! There are two periods at the end of the sentence.

The name of the company is Acme, Inc..

To solve this problem, select the period in the form, click **Condition**, and click **Yes**.



The form now includes a conditional **{.}** code. When the form is Filled, the **{.}** will disappear if it is preceded by a period, so there will never be two periods at the end of the sentence.

The name of the company is {CompanyName}{.}

Conditional Row in Table

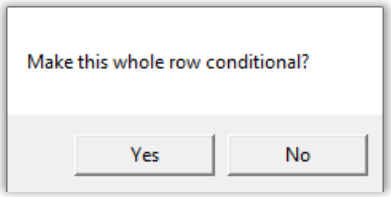
When a form includes tables, you may want to remove an entire table row under certain conditions. For example, in this form the Tax and Subtotal rows should be removed when tax is equal to 0.

Your purchases are:

Item	Price
Widgets	
Gadgets	
SUBTOTAL:	{SubtotalAmount}
Tax	{TaxAmount}
TOTAL:	{TotalAmount}

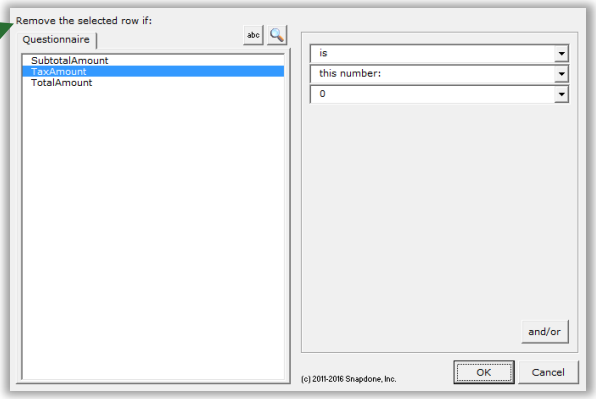
Thank you for shopping with us.

To make the Subtotal row conditional, put the cursor anywhere in that row (but don't select any text), click **Condition**, and click **Yes** to open the Condition screen.



Note that, unlike other Conditions that determine when text will be <u>included</u>, this Condition determines when the selected row will be <u>removed</u>.

In this example, the selected row will be removed when **TaxAmount is this number: 0**.



When **OK** is clicked, a **RemoveRow** Condition is added to the form.

Your purchases are:

Item	Price
Widgets	
Thingies	
SUBTOTAL: {if:[RemoveRow]}	
Tax	
TOTAL:	

Thank you for shopping with us.

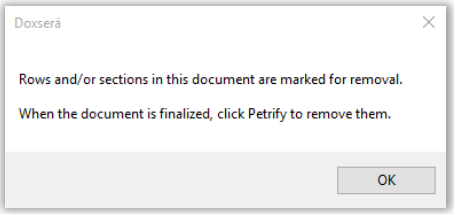
In this example, the Tax row is also conditional, so we would add the same Condition to it. (Or just copy the first Condition and paste it into the Tax row.)

Your purchases are:

Item	Price
Widgets	
Thingies	
SUBTOTAL: {if:[RemoveRow]}	
Tax {if:[RemoveRow]}	
TOTAL:	

Thank you for shopping with us.

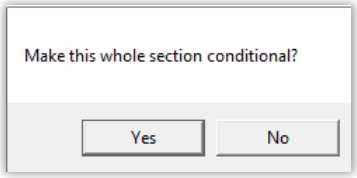
Unlike other Conditions that are fully processed during **Fill**, conditional rows are merely marked for deletion and are not removed from the document until it is finalized with **Petrify** (page 115). A message notifies form users of this requirement at the end of **Fill**.



Conditional Section in Document

When a form is divided into sections using Word's Section Break feature, you may want to remove an entire section under certain conditions.

To make a whole section conditional, put the cursor anywhere in that section (but not in a table, and don't select any text) and click **Condition**. Click **Yes** to open the Condition screen, and create the Condition as you ordinarily would. Like the conditional rows described above, this Condition determines whether the selected section will be removed. A **RemoveSection** marker is added to the form, similar to the **RemoveRow** marker described above.



Like conditional rows, conditional sections are merely marked for deletion during **Fill** and are not removed from the document until it is finalized with **Petrify**.

Telescoping Parentheses

This special condition is designed especially for legal pleading captions. It produces a flexible vertical stack of parentheses separating the two halves of a caption.

As shown here, create a 3x1 Word table with a very narrow middle column, and with border lines turned off (a dotted line is shown here for clarity). Type a lone parenthesis **)** in the middle column, select it, click **Condition**, and click **Yes**.

When the form is Filled, parenthesis will telescope to precisely fill the center column.

{PltfName}, Plaintiff, v. {RspName}, Respondent.	)	Case No. {CaseNum} {PleadTitle}

Lists

Authors

The Difference Between a Field and a List

When inserting info from a series answer into a form, it makes a big difference whether you click **Field** or **List**. Fields retrieve *info about the series* (e.g., the number of shareholders) or *a particular item* in the series (e.g., the name of the largest shareholder); and Lists retrieve *a set of items* from the List (e.g., the name of each shareholder). Since Lists can retrieve multiple items, the options for arranging those items are extensive (or, to be more precise: infinite).

For example, to turn this sentence into a form, you would create a Questionnaire with just one question, using a Text series answer (page 8).

> I have three children: Sue, Tom, and Mary.

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Label	**Question**	**Answer**
Kids	List all the children.	[??] [??] [??]

Then you'd insert a Field to retrieve the number of children *(info about the series).*

> I have {#} children: Sue, Tom, and Mary.

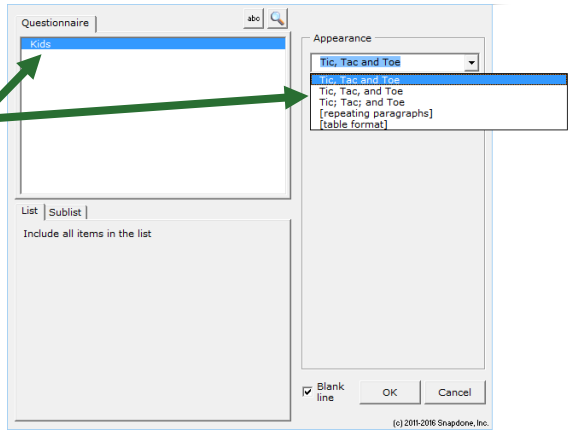
And you'd insert a List to retrieve the names of the children *(a set of items from the series).*

> I have {#} children: {List❶:{Kids❶X}|, {Kids❶X}| and {Kids❶X}}.

Inserting a List

To insert a List in a form (shareholders, signers, children, executors, etc.), click **List**.

Select the desired answer, choose a built-in List format, and click **OK**. The formats are described below.



> Only series answers are included in the List screen. If the answer you want does not appear, it is not a series answer (Textbox series, Dropdown series, Yes/No series, Checkboxes, Derived series, or Grid).

The built-in List formats are:

Tic, Tac and Toe creates a narrative List separated by commas, without a comma before the last item.

> Griselda Pugh, Horace Blixt, Eunice Brimley and Bertrand Guff

Tic, Tac, and Toe creates a narrative List separated by commas, with a comma before the last item.

Griselda Pugh, Horace Blixt, Eunice Brimley, and Bertrand Guff

Tic; Tac; and Toe creates a narrative List separated by semicolons.

Griselda Pugh; Horace Blixt; Eunice Brimley; and Bertrand Guff

The **[repeating paragraphs]** format repeats a paragraph for each item in a List.

Sample paragraph about Griselda Pugh. Sample paragraph about Horace Blixt. Sample paragraph about Eunice Brimley. Sample paragraph about Bertrand Guff.

Choose **[table format]** to arrange items in a Word table.

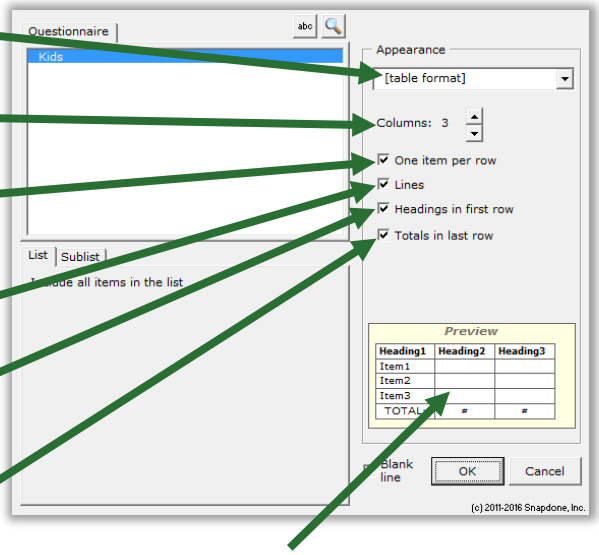
Choose the number of **Columns** in the table.

If **One item per row** is checked, each List item appears in the left column, and the remaining columns can be used for other info.

The **Lines** checkbox determines whether border lines appear in the table.

Checkmark **Headings in first row** to include headings for each column in the table.

Checkmark **Totals in last row** to create an additional row under the List items that automatically generates totals for each column.



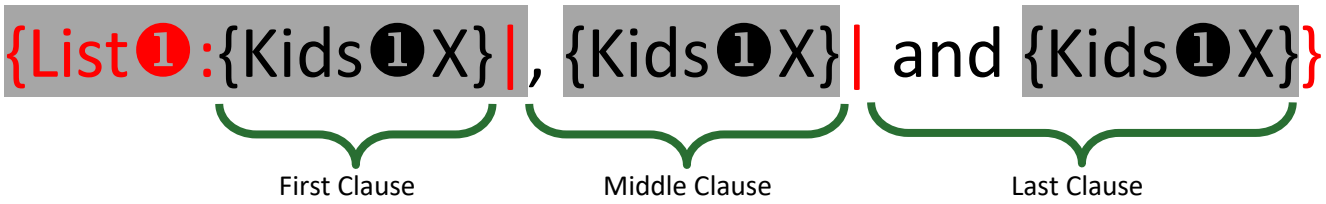
See a preview of your choices here.

After adding a table-formatted List to a form, you can further customize the table – type your own headings, remove totals from columns where they don't apply, add shading or other formatting, etc. In fact, you can customize any of the List formats to fit your exact needs.

Number Dots? You might be wondering about the circled numbers that show up in List structures: {List❶:{Kids❶X}|, {Kids❶X}| and {Kids❶X}}. They indicate the ***layer*** of a List or Field. Mostly you'll see ❶, but if you start nesting Lists inside other Lists you'll see ❷, ❸, and maybe more. See page 54 for more about layers.

Three Clauses in Every List

Every List contains three clauses separated by markers (the markers are colored red below):



The three clauses give flexibility when crafting Lists. For example, in the List shown above, the middle clause includes a comma, and the last clause includes **and**. With four kids, the resulting List looks like this: **Andy, Betty, Carl and Debra**. (There are two commas, because the middle clause appears twice, because there are two middle kids.)

Look at two more sample Lists below, and their results for four kids. Notice that the middle clause appears twice in each sample, because there are two middle kids.

This custom List …	… creates this finished product
{List:My firstborn child is {Kids#X}|, the next oldest is {Kids#X}|, and the youngest is {Kids#X}}.	My firstborn child is Andy, the next oldest is Betty, the next oldest is Carl, and the youngest is Debra.
The remainder of my estate is divided as follows: {List:One equal share to {Kids#X}|; One equal share to {Kids#X}|; and One equal share to {Kids#X}}.	The remainder of my estate is divided as follows: One equal share to Andy; One equal share to Betty; One equal share to Carl; and One equal share to Debra.

Lesson 7 Lesson 7 Lesson 7

Lesson 7: Lists

- Text series answer (page 8)
- Dropdown answer (page 9)
- List (page 49)

This form uses a series answer three different ways: two types of Lists and as a source for another answer.

1 Create the Questionnaire

a Type or copy/paste this text into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

a

The following shareholders attended the meeting: Gretel Murphy and Derek Wiley. The shareholders unanimously elected Gretel Murphy as President of the Company.

Shareholders:

_____
Gretel Murphy

_____
Derek Wiley

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Label	Question	Answer
Shareholders	List all the shareholders.	
President	Who is the president of the company?	

b

2 Create Smart Answers

- **a** Put the cursor in the **Shareholders** answer box and click **Smart Answer**
- **b** Select **Series of text boxes** and click **OK**
- **c** Put the cursor in the **President** answer box and click **Smart Answer**
- **d** Click the **Dropdown** answer type
- **e** Select the source **another answer**, **Shareholders** and click **OK**

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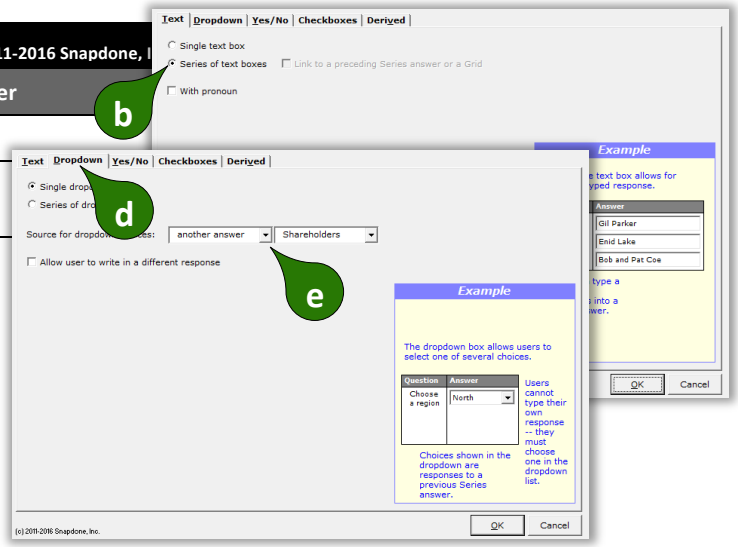
Label	Question	Answer
Shareholders	List all the shareholders.	
President	Who is the president of the company?	



3 Add a Field

- **a** Select Gretel Murphy in the second sentence
- click **Field**, select the **President** answer, and click **OK**

Before

The following shareholders attended the meeting: Gretel Murphy and Derek Wiley. The shareholders unanimously elected Gretel Murphy as President of the Company.

a

After

The following shareholders attended the meeting: Gretel Murphy and Derek Wiley. The shareholders unanimously elected {President} as President of the Company.

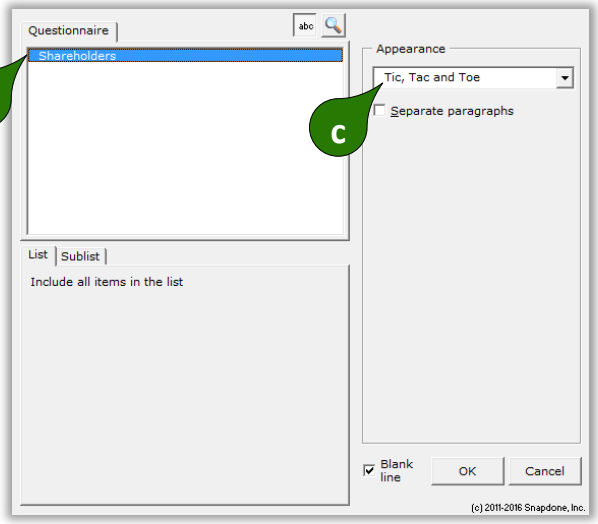
4 Add the first List

a Select **Gretel Murphy and Derek Wiley** and click **List**

b Select the **Shareholders** answer

c Select the **Tic, Tac and Toe** appearance and click **OK**

The following shareholders attended the meeting: Gretel Murphy and Derek Wiley. The shareholders unanimously elected {President} as President of the Company.



5 Add the second List

a Select the signature block and click **List**

b Select the **Shareholders** answer

c Select the **[repeating paragraphs]** appearance and click **OK**

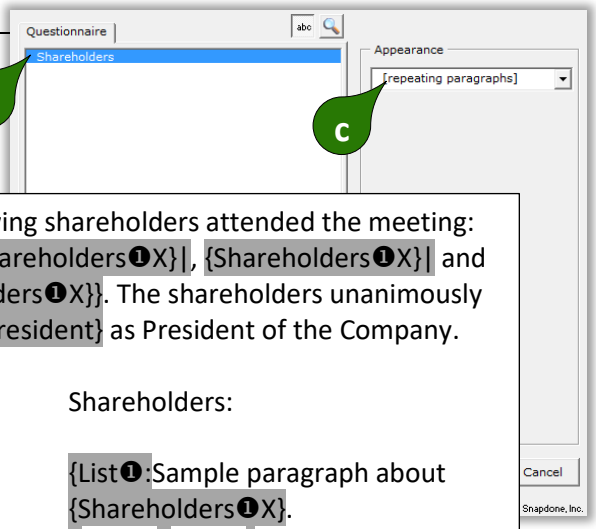
The following shareholders attended the meeting: {List❶:{Shareholders❶X}|, {Shareholders❶X}| and {Shareholders❶X}}. The shareholders unanimously elected {President} as President of the Company.

Shareholders:

Gretel Murphy

Derek Wiley

Before



The following shareholders attended the meeting: {List❶:{Shareholders❶X}|, {Shareholders❶X}| and {Shareholders❶X}}. The shareholders unanimously elected {President} as President of the Company.

Shareholders:

{List❶:Sample paragraph about {Shareholders❶X}.
|[ditto]|[ditto]}

After

In the **[repeating paragraphs]** List appearance, **[ditto]** indicates that the contents of the first clause are duplicated in the middle clause, and duplicated again in the last clause. So any changes made in the first clause are reflected in the middle and last clauses. This is handy when you want every item in the List to be treated identically.

6 Customize the second List

a Replace **Sample paragraph about** with a blank line followed by a hard return (**Enter**)

b Delete the period

Before

Shareholders:

{List❶:Sample paragraph about {Shareholders❶X}.
|[ditto]|[ditto]}

After

Shareholders:

{List❶:_____
{Shareholders❶X}
|[ditto]|[ditto]}

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Note that the shareholder names only need to be typed once, but appear twice in the form. And the form user selected the president in a dropdown box containing shareholder names, so the president's name was used three times in the form but only typed once.

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Label	Question	Answer
Shareholders	List all the shareholders.	Roger Billings Esther Graves Bea Lester
President	Who is the president of the company?	Esther Graves

The following shareholders attended the meeting: Roger Billings, Esther Graves and Bea Lester.

The shareholders unanimously elected Esther Graves as President of the Company.

Shareholders:

Roger Billings

Esther Graves

Bea Lester

After typing shareholder names in the first answer and moving the cursor to the second answer box, a flag appears above the cursor, reminding the form user to **click Refresh to update list**. After clicking **Refresh**, the names from the first answer are selectable in the second answer's dropdown box.

List Layers

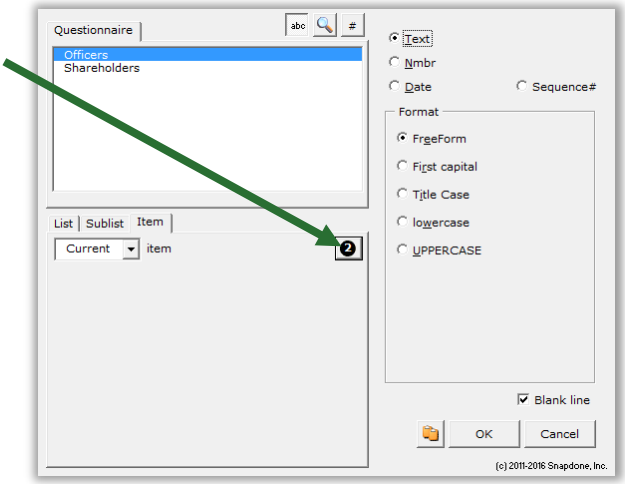
A List can be nested inside another List (which may itself be nested inside another List, up to 10 layers deep). To keep track of nested Lists and the Fields and Conditions they contain, **Dox/DB/AwD** uses ❶❷❸ indicators. You will most commonly see ❶s in your forms, but other numbers will appear in rare situations where nested Lists occur. If you ever add an item Field *outside* a List (unusual, but possible), it will be tagged with a ⓪.

Here a List of shareholders (layer ❶) creates a paragraph for each shareholder. Within each paragraph, a List of directors (layer ❷) is nested.

{List❶:Shareholder {Shareholders❶X} votes to approve the following directors: {List❷:{Directors❷X}|, {Directors❷X}| and {Directors❷X}}.

|[ditto]|[ditto]}

When working within nested Lists, note the layer selector button that appears in many screens. You can ignore it *almost* always. But in rare circumstances (like the lesson below), you will click this button to refer to info from an outer layer while you're working within a nested layer.



Lesson 8 Lesson 8 Lesson 8

Lesson 8: List Layers

- Grid (page 15)
- Dropdown answer (page 9)
- Date Field (page 17)
- Sublist (page 67)
- List layers (page 54)

This form uses nested Lists to create a hierarchy of signatures from a Grid.

Consider this signature block:

Signed this ___ day of _____, ____.

[name of buyer]

By: _____
[signer], [title]

We should put the Buyer signature in a List, so the form will be able to handle multiple Buyers. And what if one of the Buyers has several parties signing for it? They can be handled with a nested List.

1 Create the Questionnaire and a Grid

a Type or copy/paste the signature block into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

- Click **Questionnaire**, **Grid**, **Add**, and choose **2** columns

a

Signed this ___ day of _____, ____.

[name of buyer]

By: _____
[signer], [title]

b

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Label	Question	Answer
SignDate	Date of signing	

Every Grid has four parts:

Overall instructions that apply to the entire Grid.

A label for each column (Field names)

A heading for each column (instructions for user)

Answer boxes where the form user responds

[instructions]

[label]	[label]	[label]	[label]
[heading]	**[heading]**	**[heading]**	**[heading]**

2 Fill in the Grid

a Fill in the Grid and its instructions as shown

List the Buyer(s) first, then any people/entities signing for Buyer(s):

a

Name	Parent
Name of Buyer or signer	**If signing for a Buyer, which one?**

3 Create a Smart Answer

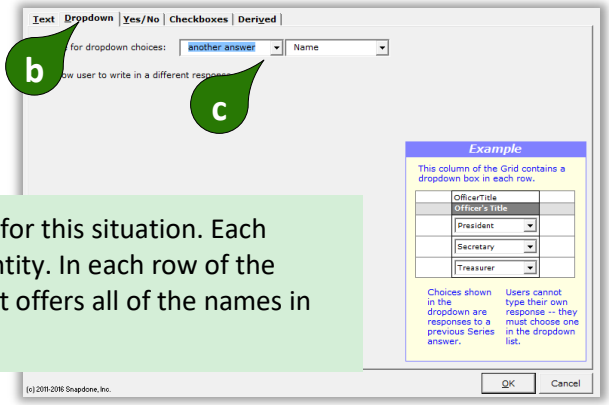
a Put the cursor anywhere in the **Parent** column of the Grid and click **Smart Answer**

b Click the **Dropdown** answer type

c Select the source **another answer, Name** and click **OK**

Name	Parent
Name of Buyer or signer	**If signing for a Buyer, which one?**

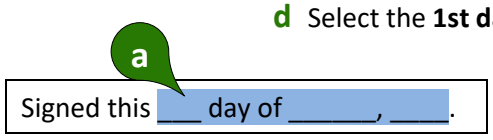
a

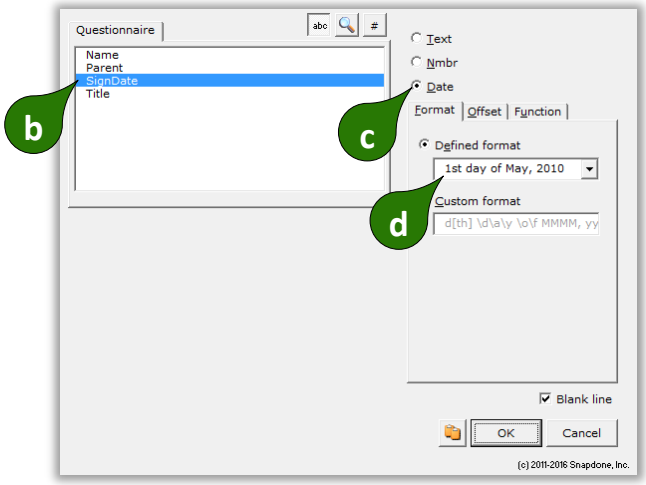


This is an unusual arrangement, but it works well for this situation. Each entity in the left column might have a "parent" entity. In each row of the right column, we provide a dropdown answer that offers all of the names in the left column as its choices.

4 Add a date Field

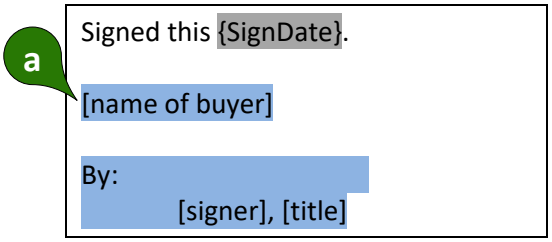
- **a** Select the text that will be replaced with a date Field and click **Field**
- **b** Select the **SignDate** answer
- **c** Select the **Date** Field type
- **d** Select the **1st day of May, 2010** format and click **OK**

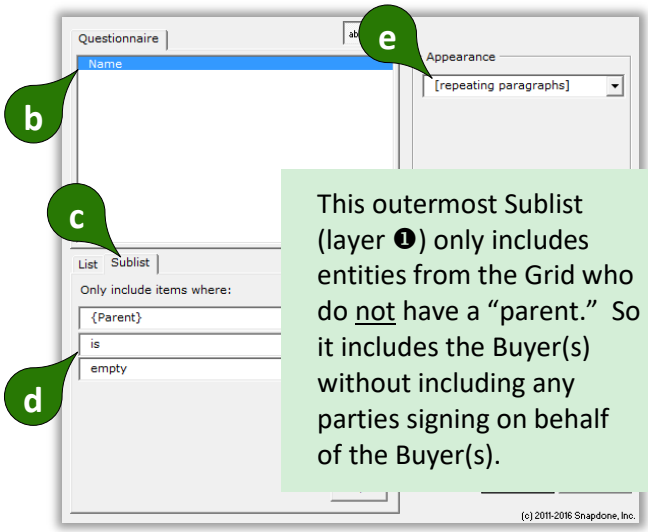




5 Add a Sublist

- **a** Select the signature block and click **List**
- **b** Select the **Name** answer
- **c** Click **Sublist**
- **d** Choose to only include items where **{Parent} is empty**
- **e** Select **[repeating paragraphs]** appearance and click **OK**





This outermost Sublist (layer ❶) only includes entities from the Grid who do <u>not</u> have a "parent." So it includes the Buyer(s) without including any parties signing on behalf of the Buyer(s).

6 Customize the Sublist

- **a** Delete **Sample paragraph about**
- **b** Replace the period with two hard returns (press **Enter** twice)

Before

Signed this {SignDate}.

{Sublist❶:Sample paragraph about {Name❶X}.
|[ditto]|[ditto]}

After

Signed this {SignDate}.

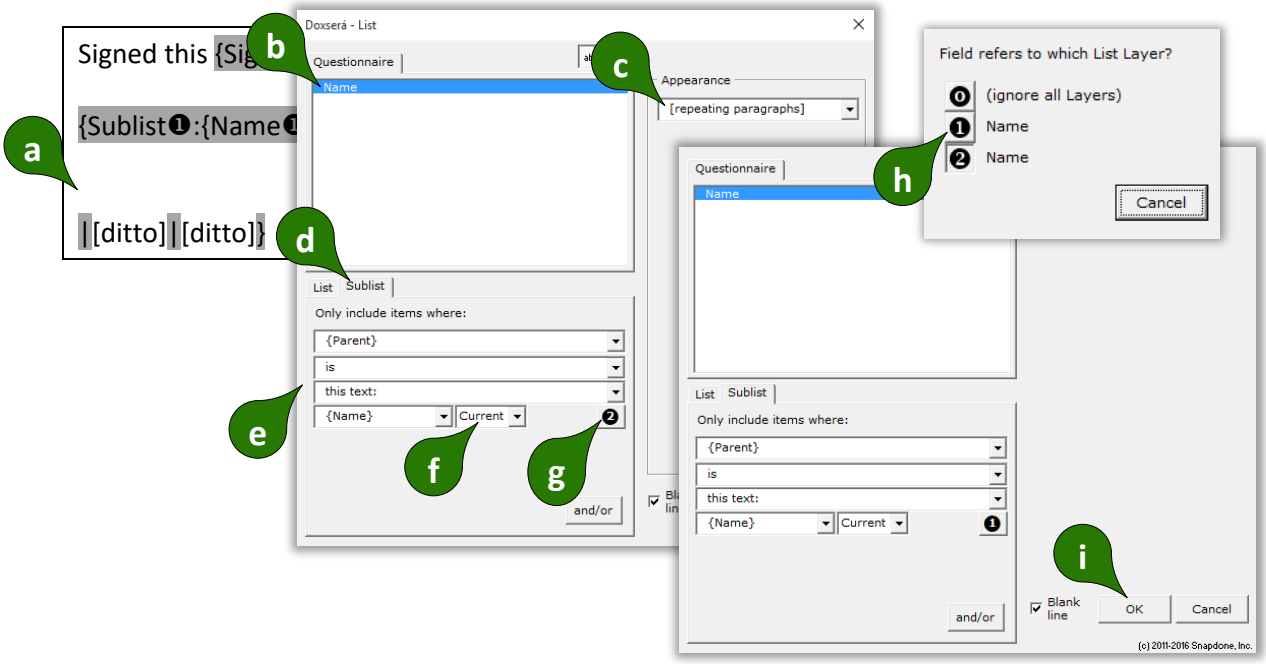
{Sublist❶:{Name❶X}

|[ditto]|[ditto]}

The outer List (layer ❶) will repeat once for each Buyer **{Name❶X}**. Within each iteration, we'll create a nested List (layer ❷) that repeats once for each of the current Buyer's signers.

7 Add a nested Sublist

- **a** Put the cursor where signers' names should appear (the line above the **[ditto]**s) and click **List**
- **b** Select the **Name** answer
- **c** Select **[repeating paragraphs]** appearance
- **d** Click **Sublist**
- **e** Choose to only include items where **{Parent} is this text: {Name}**
- **f** Select the **Current** item
- **g** Click ❷ to change the layer
- **h** Click ❶ to use the name from layer ❶
- **i** Click **OK**



To help explain why we chose layer ❶ above, suppose we have two buyers and three signers:

Name	Parent
Name of Buyer or signer	**If signing for a Buyer, which one?**
Acme, Inc.	
Smith Co.	
Alan Acme	Acme, Inc.
Bernice Smith	Smith Co.
Claudia Smith	Smith Co.

The outer List (layer ❶) is a list of *buyers.* It will repeat twice: once for buyer **Acme, Inc.** and once for buyer **Smith Co.** For each buyer there is an inner List (layer ❷) of *signers.*

The first time through the outer List, buyer **Acme, Inc.** is named, and the inner List consists of all the people whose parent is **Acme, Inc.** (the current buyer in layer ❶).

The second time through the outer List, buyer **Smith Co.** is named, and the inner List consists of all the people whose parent is **Smith, Co.** (the current buyer in layer ❶).

In both cases, the inner list of signers is determined by looking to see who is a child of the current buyer in layer ❶.

8 Customize the nested Sublist

a Replace **Sample paragraph about** with **By: _____** followed by a hard return (**Enter**) and a **Tab**

b Delete the period

Signed this {SignDate}.

{Sublist❶:{Name❶X}

{Sublist❷:Sample paragraph about {Name❷X}.
|[ditto]|[ditto]}
|[ditto]|[ditto]}

a b

Before

Signed this {SignDate}.

{Sublist❶:{Name❶X}

{Sublist❷:By: _____
{Name❷X}
|[ditto]|[ditto]}
|[ditto]|[ditto]}

After

THE PAYOFF

Nested lists create a flexible hierarchy of signatures from a single Grid.

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Label	Question	Answer
SignDate	Date of signing?	2/17/2017

List the Buyer(s) first, then any people/entities signing for Buyer(s):

Name	Parent
Name of Buyer or signer	**If signing for another entity, for whom?**
Acme, Inc.	[??]
Smith Co.	[??]
Alan Acme	Acme, Inc.
Bernice Smith	Smith Co.
Claudia Smith	Smith Co.

Signed this 17th day of February, 2017.

Acme, Inc.

By: _____
Alan Acme

Smith Co.

By: _____
Bernice Smith

By: _____
Claudia Smith

Linked Answers in Lists

Every List is based on a particular series answer in the Questionnaire. But when customizing Lists, you can include Fields that refer to *any* answer, not just the original series answer. And you'll get even more mileage out of answers that are linked to the original series.

Lesson 9 Lesson 9 Lesson 9

Lesson 9:
List with Linked Answer

- Text series answer (page 8)
- Linked answer (page 8)
- List (page 49)
- Current item Field (page 63)

This form gathers and presents related data (names and birthdates).

1 **Create the Questionnaire**

a Type or copy/paste this paragraph into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

a

I leave the remainder of my estate to my children: Andy (born January 1, 1991), Betty (born February 2, 1992), Carl (born March 3, 1993) and Debra (born April 4, 1994).

b

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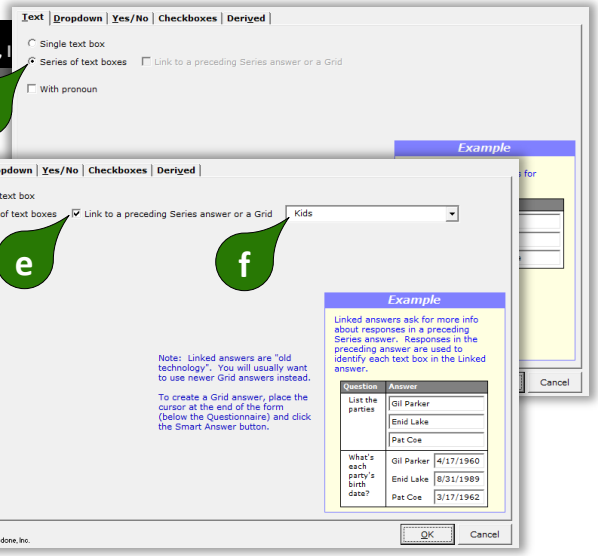
Label	Question	Answer
Kids	List the will maker's children.	
DOB	What's each child's date of birth?	

2 Create Smart Answers

- **a** Put the cursor in the **Kids** answer box and click **Smart Answer**
- **b** Select **Series of text boxes** and click **OK**
- **c** Put the cursor in the **DOB** answer box and click **Smart Answer**
- **d** Select **Series of text boxes**
- **e** Checkmark **Link to a preceding series answer or a Grid**
- **f** Select the **Kids** answer and click **OK**

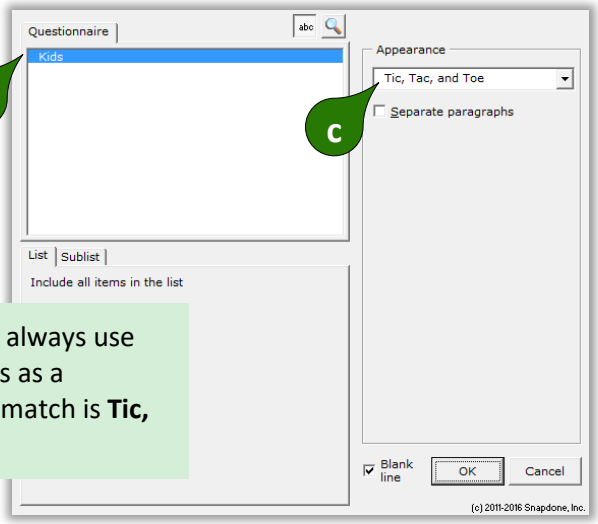
Doxserá (c) 2011-2016 Snapdone, I		
Label	Question	Answer
Kids	List the will maker's children.	
DOB	What's each child's date of birth?	



3 Add a List

- **a** Select the kids and dates that will be replaced with a List and click **List**
- **b** Select the **Kids** answer
- **c** Select the **Tic, Tac, and Toe** appearance and click **OK**

I leave the remainder of my estate to my children: Andy (born January 1, 1991), Betty (born February 2, 1992), Carl (born March 3, 1993) and Debra (born April 4, 1994).



Even when creating a custom List, you always use one of the predefined List appearances as a starting point. In this case, the closest match is **Tic, Tac, and Toe**.

4 Customize the List with additional text

a In each of the three clauses, type **(born ___)** after the **{Kids❶X}** Field

Before

I leave the remainder of my estate to my children: {List❶:{Kids❶X}|, {Kids❶X}|{#>2:,} and {Kids❶X}}.

After

I leave the remainder of my estate to my children: {List❶:{Kids❶X} (born ___)|, {Kids❶X} (born ___)|{#>2:,} and {Kids❶X} (born ___)}.

5 Add a Field

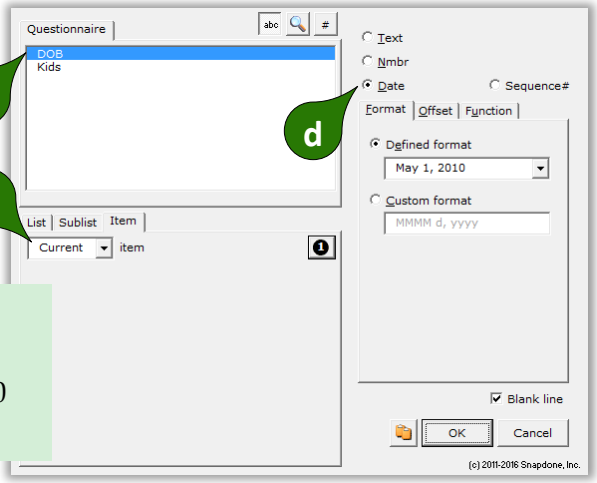
a Select the first blank line and click **Field**

b Select the **DOB** answer

c Select the **Current** item

d Select the **Date** Field type and click **OK**

I leave the remainder of my estate to my children: {List❶:{Kids❶X} (born ___)|, {Kids❶X} (born ___)|{#>2:,} and {Kids❶X} (born ___)}.



You will almost always use **Current** item when adding Fields from a linked answer into a List. For an exception, see Lesson 10 on page 64.

6 Add two more Fields

a Select **{DOB❶X}** and copy with **Ctrl+C**

b Select each remaining blank line and paste with **Ctrl+V**

Before

I leave the remainder of my estate to my children: {List❶:{Kids❶X} (born {DOB❶X})|, {Kids❶X} (born ___)|{#>2:,} and {Kids❶X} (born ___)}.

After

I leave the remainder of my estate to my children: {List❶:{Kids❶X} (born {DOB❶X})|, {Kids❶X} (born {DOB❶X})|{#>2:,} and {Kids❶X} (born {DOB❶X})}.

Lesson 9 Lesson 9 Lesson 9

THE PAYOFF

No matter how many children are typed in the Questionnaire, the custom List expands to accommodate them, and includes supplemental info (a birthdate) for each.

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Label	Question	Answer
Kids	List the will maker's children.	Ann Bill Carla Dan
DOB	What's each child's date of birth?	Ann: 1/1/2001 Bill: 2/2/2002 Carla: 3/3/2003 Dan: 4/4/2004

I leave the remainder of my estate to my children: Ann (born January 1, 2001), Bill (born February 2, 2002), Carla (born March 3, 2003), and Dan (born April 4, 2004).

Lesson 9 Lesson 9 Lesson 9

First, Previous, Current, Next, and Last

You might have wondered about the **X** in Fields that appear within Lists:

{Kids❶X} {DOB❶X}

The character after the ❶ indicates which item in the List should be used for that Field. **X** refers to the ***current*** item. But once in a blue moon special circumstances may arise — you might want the third clause to refer to the ***first*** item, or you might want each occurrence of the middle clause to refer to the ***next*** item. The five possibilities are:

F = First **P = Previous** **X = Current** **N = Next** **L = Last**

Lesson 10: List with Previous Item

- Text series answer (page 8)
- List (page 49)
- Current item Field (page 63)
- Previous item Field (page 63)

This form automatically handles a fiddly situation – referring to previous items in a list – that you previously had to do by hand.

1 Create the Questionnaire

a Type or copy/paste this paragraph into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

a

I select Alan Avery as my personal representative. If Alan Avery is unable or unwilling to serve, then I select Brenda Blake. If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.

b

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Label	Question	Answer
PRs	List the personal representatives	

Note the structure of the paragraph in this form. The first sentence refers to the first personal representative.

I select Alan Avery as my personal representative.

The middle sentence refers to the first and second personal representatives.

If Alan Avery is unable or unwilling to serve, then I select Brenda Blake.

And the last sentence refers to the second and third personal representatives. We'll handle this awkward situation with "previous" Fields.

If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.

2 Create a Smart Answer

a Put the cursor in the **PRs** answer box and click **Smart Answer**

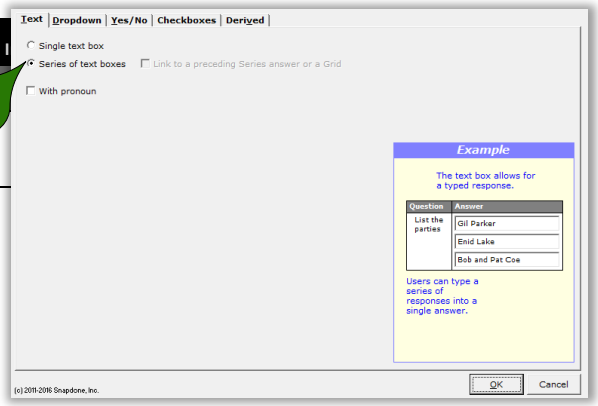
b Select **Series of text boxes** and click **OK**

Doxserá (c) 2011-2016 Snapdone, I

Label	Question	Answer
PRs	List the personal representatives	

a

b



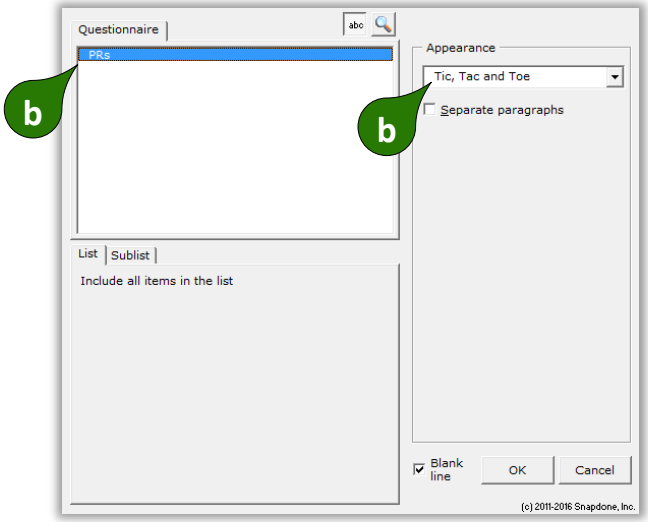
3 Add a List

a Select the whole passage and click **List**

b Select the **PRs** question and **Tic, Tac and Toe** appearance, and click **OK**

a

I select Alan Avery as my personal representative. If Alan Avery is unable or unwilling to serve, then I select Brenda Blake. If Brenda Blake is unable or unwilling to serve, then I select Carla Cooper.



4 Customize the first clause

In the first clause:

a Type **I select** before **{PRs❶X}**

b Type **as my personal representative.** (including space at the end) after **{PRs❶X}**

a

Before

{List❶:{PRs❶X}|, {PRs❶X}| and {PRs❶X}}

b

After

{List❶:I select {PRs❶X} as my personal representative. |, {PRs❶X}| and {PRs❶X}}

5 Customize the middle clause

In the middle clause:

a Delete the comma and type **If ___ is unable or unwilling to serve, then I select** before **{PRs❶X}**

b Type a period and space after **{PRs❶X}**

b

Before

{List❶:I select {PRs❶X} as my personal representative. |, {PRs❶X}| and {PRs❶X}}

a

After

{List❶:I select {PRs❶X} as my personal representative. |If ___ is unable or unwilling to serve, then I select {PRs❶X}. | and {PRs❶X}}

6 Customize the last clause

In the last clause:

a Delete **and** and type **If ___ is unable or unwilling to serve, then I select** before **{PRs❶X}**

b Type a period after **{PRs❶X}**

Before

{List❶:I select {PRs❶X} as my personal representative. |If ___ is unable or unwilling to serve, then I select {PRs❶X}. | and {PRs❶X}}

After

{List❶:I select {PRs❶X} as my personal representative. |If ___ is unable or unwilling to serve, then I select {PRs❶X}. |If ___ is unable or unwilling to serve, then I select {PRs❶X}.}

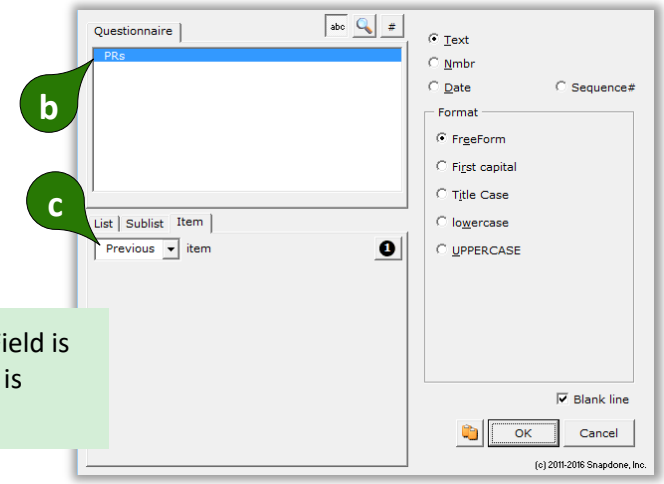
7 Add a Field

a Select the first blank line and click **Field**

b Select the **PRs** answer

c Select the **Previous** item and click **OK**

{List❶:I select {PRs❶X} as my personal representative. |If ___ is unable or unwilling to serve, then I select {PRs❶X}. |If ___ is unable or unwilling to serve, then I select {PRs❶X}.}



When the form is Filled and a "previous" Field is encountered, the previous item in the List is retrieved instead of the current item.

8 Add one more Field

a Select **{PRs❶P}** and copy with **Ctrl+C**

b Select the blank line and paste with **Ctrl+V**

Before

{List❶:I select {PRs❶X} as my personal representative. |If {PRs❶P} is unable or unwilling to serve, then I select {PRs❶X}. |If ___ is unable or unwilling to serve, then I select {PRs❶X}.}

After

{List❶:I select {PRs❶X} as my personal representative. |If {PRs❶P} is unable or unwilling to serve, then I select {PRs❶X}. |If {PRs❶P} is unable or unwilling to serve, then I select {PRs❶X}.}

Lesson 10 Lesson 10 Lesson 10

THE PAYOFF

The language changes dynamically depending on the number of personal representatives typed into the Questionnaire.

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Label	Question	Answer
PRs	List the personal representatives.	Humphrey Cogg

I select Humphrey Cogg as my personal representative.

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Label	Question	Answer
PRs	List the personal representatives.	Humphrey Cogg Ella Grendle

I select Humphrey Cogg as my personal representative. If Humphrey Cogg is unable or unwilling to serve, then I select Ella Grendle.

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Label	Question	Answer
PRs	List the personal representatives.	Humphrey Cogg Ella Grendle Stanley Frock Quentin Lacrosse

I select Humphrey Cogg as my personal representative. If Humphrey Cogg is unable or unwilling to serve, then I select Ella Grendle. If Ella Grendle is unable or unwilling to serve, then I select Stanley Frock. If Stanley Frock is unable or unwilling to serve, then I select Quentin Lacrosse.

Lesson 10 Lesson 10 Lesson 10

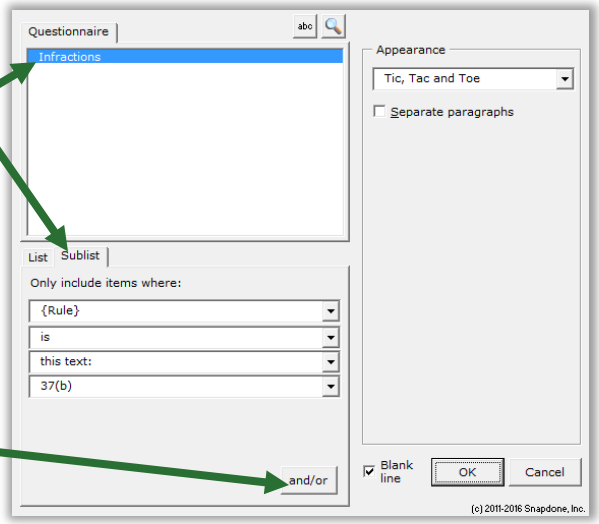
Sublists

You may also create a List that includes only some of the items typed by the form user in a series answer.

To insert a Sublist in a form, click **List**, select an answer, then click **Sublist** and choose which items should be included.

In the example shown here, the Questionnaire includes a series answer labeled **Infractions**, and a linked answer labeled **Rule**. The Sublist being created will only include infractions that violate **Rule 37(b)**.

If additional criteria are required to create your Sublist, click **and/or** to create a compound Condition (page 38).



Lesson 11: Sublists

- Text series answer (page 8)
- Dropdown linked series answer (page 9)
- Sublist (page 67)

This form derives two Sublists from a single series of names.

1 Create the Questionnaire

a Type or copy/paste this paragraph into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

Officers who attended the meeting were Alan Diggle, Bernice Fenster, and Roy Barnes. Also present were Jerome Fuller, Cynthia Wilson, and Esther Spaulding.

a

b

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Label	Question	Answer
Attendees	List all the attendees.	
Officers	For the attendees who are officers, choose an office.	

2 Create Smart Answers

a Put the cursor in the **Attendees** answer box and click **Smart Answer**

b Select **Series of text boxes** and click **OK**

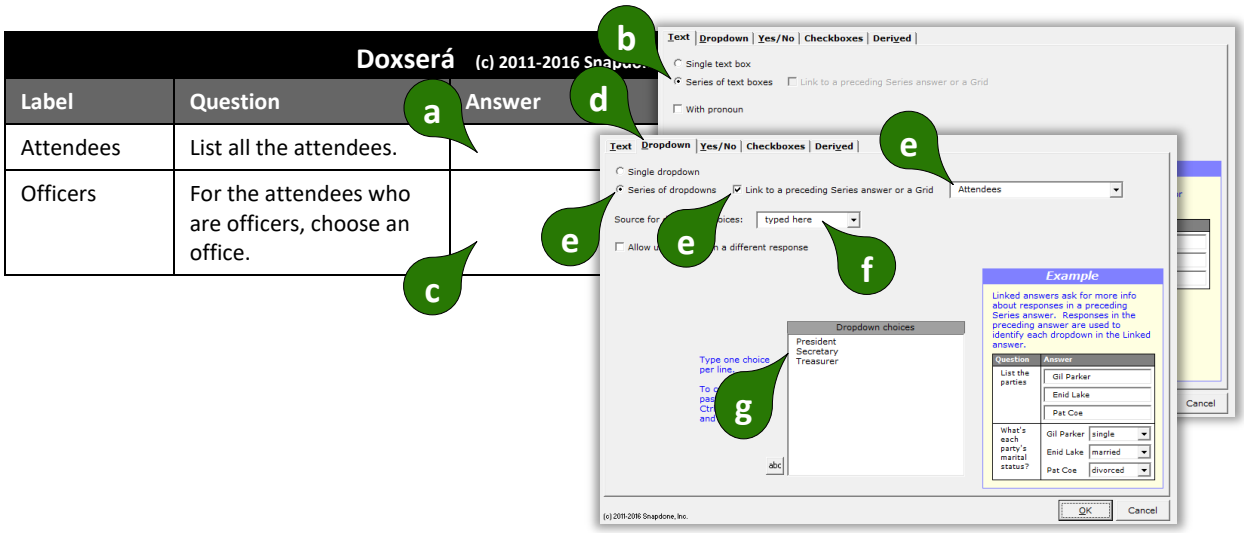
c Put the cursor in the **Officers** answer box and click **Smart Answer**

d Click the **Dropdown** answer type

e Select **Series of dropdowns**, **Link to a preceding series answer or a Grid**, **Attendees**

f Select the source **typed here**

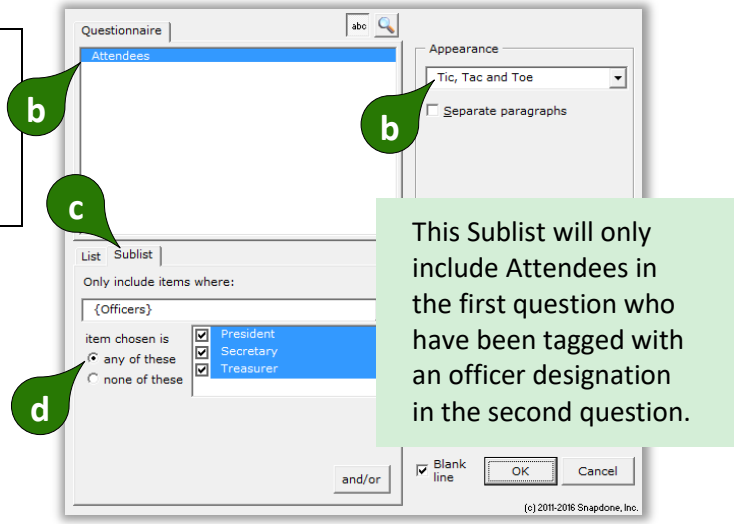
g Type the choices **President**, **Secretary**, and **Treasurer** (each on a separate line) and click **OK**



3 Add the first Sublist

- **a** Select **Alan Diggle, Bernice Fenster, and Roy Barnes** and click ☰ **List**
- **b** The **Attendees** question and **Tic, Tac and Toe** appearance are selected
- **c** Click **Sublist**
- **d** Choose to include items where the **{Officers}** answer is **<u>any</u> of these**: **President**, **Secretary**, **Treasurer**, and click **OK**

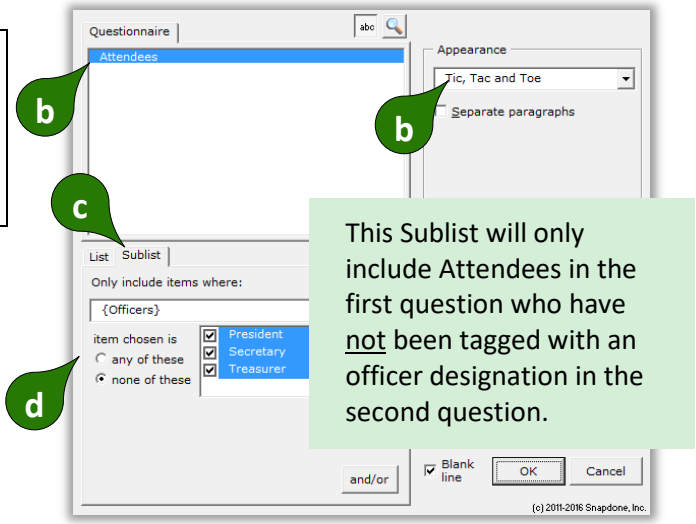
Officers who attended the meeting were Alan Diggle, Bernice Fenster, and Roy Barnes. Also present were Jerome Fuller, Cynthia Wilson, and Esther Spaulding.



4 Add the second Sublist

- **a** Select **Jerome Fuller, Cynthia Wilson, and Esther Spaulding** and click ☰ **List**
- **b** The **Attendees** question and **Tic, Tac and Toe** appearance are selected
- **c** Click **Sublist**
- **d** Choose to include items where the **{Officers}** answer is **<u>none</u> of these**: **President**, **Secretary**, **Treasurer**, and click **OK**

Officers who attended the meeting were {Sublist❶Attendees❶X}|, {Attendees❶X}| and {Attendees❶X}}. Also present were Jerome Fuller, Cynthia Wilson, and Esther Spaulding.



At first glance, the two **{Sublist❶:** codes appear to be identical, but they are not. To review (or change) the specifics of a Sublist, put the cursor in the code and click ☰ **List** to return to the List editing screen.

> Officers who attended the meeting were {Sublist❶:{Attendees❶X}|, {Attendees❶X}| and {Attendees❶X}}. Also present were {Sublist❶:{Attendees❶X}|, {Attendees❶X}| and {Attendees❶X}}.

THE PAYOFF

A series and linked answer in the Questionnaire are used to populate two distinct Sublists in the finished document.

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Label	Question	Answer
Attendees	List all the attendees.	Judith Flambe Orson Coot Roger Beeman Hana Lorang Inez Pierce
Officers	For the attendees who are officers, choose an office.	Judith Flambe: President Orson Coot: [??] Roger Beeman: [??] Hana Lorang: Secretary Inez Pierce: Treasurer

MEETING MINUTES

Officers who attended the meeting were Judith Flambe, Hana Lorang, and Inez Pierce. Also present were Orson Coot and Roger Beeman.

Grids and Lists

Grids are often used as a source for Lists. Each Grid is composed of a series answer in the first column (used to create the List structure), and linked series answers in the secondary columns (each of which can be incorporated when customizing the List).

Lesson 12: List with a Grid

- Grid (page 15)
- Dropdown answer (page 9)
- List (page 49)
- Number Field (page 16)
- Condition (page 32)
- Sublist (page 67)
- First item Field (page 63)

This form gathers info with a Grid, then translates it to a narrative structure.

1 Create the Questionnaire

a Type or copy/paste this text into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

- Click **Questionnaire**, **Grid**, **Add**, and choose **4** columns

c Fill in the Grid and its instructions as shown

a

Estimate for Smith Residence

Overview: Rodents were found in three rooms. Termites were found in one room.

Plan: Deploy rat traps ($60). Spray pesticide ($150).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the traps are retrieved.

b

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Label	**Question**	**Answer**
Client	Client's last name?	

c

Describe the pests and proposed action:

Pest	Rooms	Action	Cost
Type of pest	**# of rooms**	**Proposed action**	**Price quote**

2 Create a Smart Answer

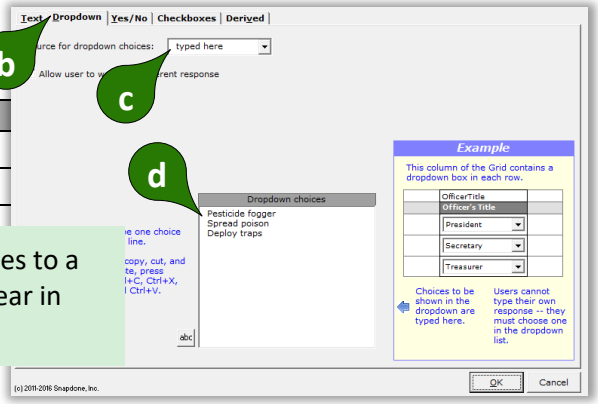
a Put the cursor anywhere in the third column of the Grid and click **Smart Answer**.

b Click the **Dropdown** answer type

c Select the **typed here** source

d Type the choices **Pesticide fogger**, **Spread poison**, and **Deploy traps** (each on a separate line) and click **OK**

Pest	Rooms	Action	Cost
Type of pest	**# of rooms**	**Proposed action**	**Price quote**



When a Smart Answer is applied to a Grid, it applies to a whole column. So this dropdown answer will appear in the third column for each answer row.

3 Add a Field

a Select **Smith** and click **Field**

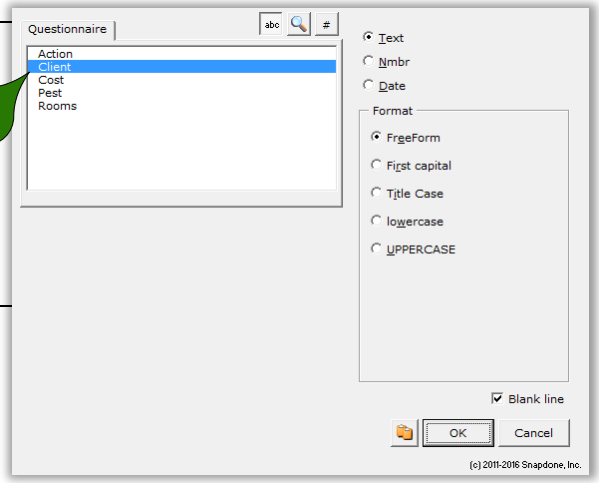
b Select the **Client** answer and click **OK**

Estimate for Smith Residence

Overview: Rodents were found in three rooms. Termites were found in one room.

Plan: Deploy rat traps ($60). Spray pesticide ($150).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the traps are retrieved.



4 Add the first List

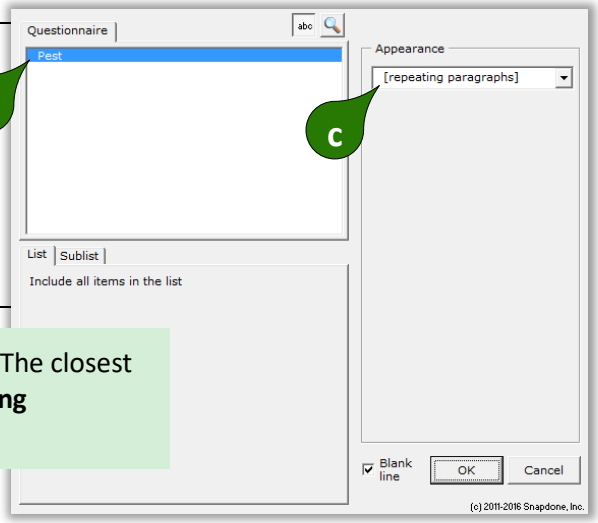
- **a** Select these two sentences and click ☰ **List**
- **b** Select the **Pest** answer
- **c** Select the **[repeating paragraphs]** appearance and click **OK**

a **mate for {Client} Residence**

Overview: Rodents were found in three rooms. Termites were found in one room.

Plan: Deploy rat traps ($60). Spray pesticide ($150).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the traps are retrieved.



This custom List consists of repeating sentences. The closest match among the appearance choices is **[repeating paragraphs]**, so we'll use that as a starting point.

5 Customize the first List

- **a** Delete **Sample paragraph about**
- **b** Type **were found in ___ rooms** after **{Pest❶X}**
- **c** Replace the hard return with a space

Before

Overview: {List❶:Sample paragraph about {Pest❶X}. |[ditto]|[ditto]} a b c

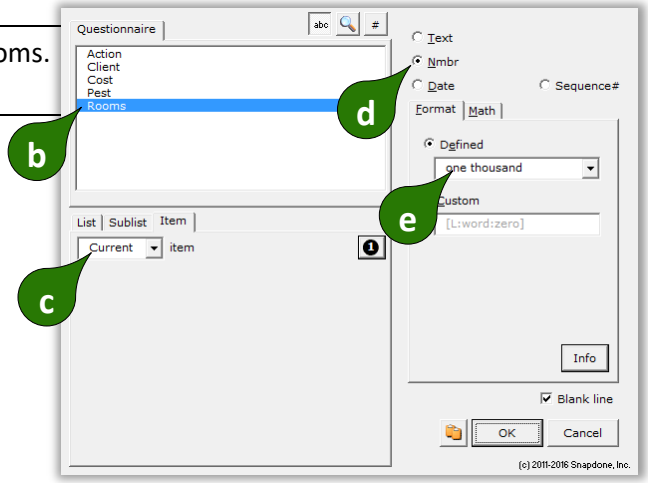
After

Overview: {List❶:{Pest❶X} were found in ___ rooms. |[ditto]|[ditto]}

6 Add a Field to the first List

- **a** Select the blank line and click **Field**
- **b** Select the **Rooms** answer
- **c** Select the **Current** item
- **d** Select the **Nmbr** Field type
- **e** Select the **one thousand** format and click **OK**

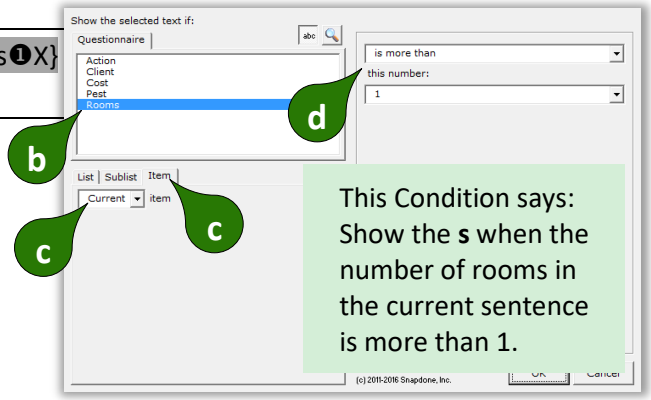
Overview: {List❶:{Pest❶X} were found in ___ rooms. |[ditto]|[ditto]}



7 Add a Condition to the first List

- **a** Select the **s** at the end of **rooms** and click **Condition**
- **b** Select the **Rooms** answer
- **c** Click **Item** and select the **Current** item in the List
- **d** Select the condition **is more than 1** and click **OK**

Overview: {List❶:{Pest❶X} were found in {Rooms❶X} rooms. |[ditto]|[ditto]}



8 Add the second List

a Select these two sentences and click ☰ **List**

b Select the **Pest** answer

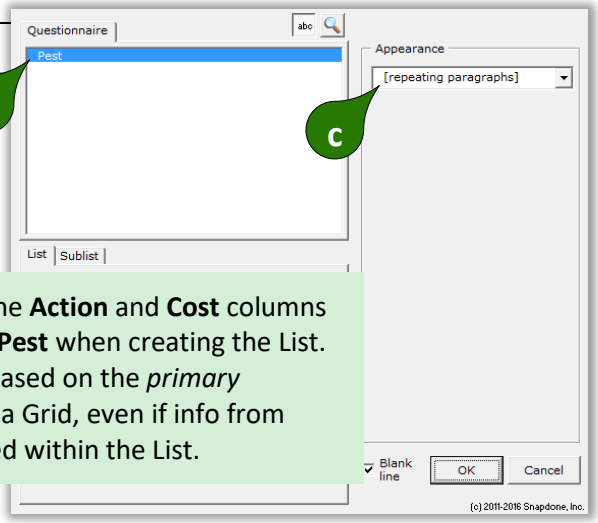
c Select the **[repeating paragraphs]** appearance and click **OK**

Estimate for {Client} Residence

Overview: {List❶:{Pest❶X} were found in {Room ro[illegible]if:s}. |[ditto]|[ditto]}

Plan: Deploy rat traps ($60). Spray pesticide ($150).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the traps are retrieved.



This List will only use info from the **Action** and **Cost** columns of the Grid, but we still selected **Pest** when creating the List. That's because Lists are always based on the *primary* column (the leftmost column) in a Grid, even if info from that column is ultimately not used within the List.

9 Customize the second List

a Replace **Sample paragraph about** with a blank line

b Replace **{Pest❶X}** with **($___)**

c Replace the hard return with a space

Before

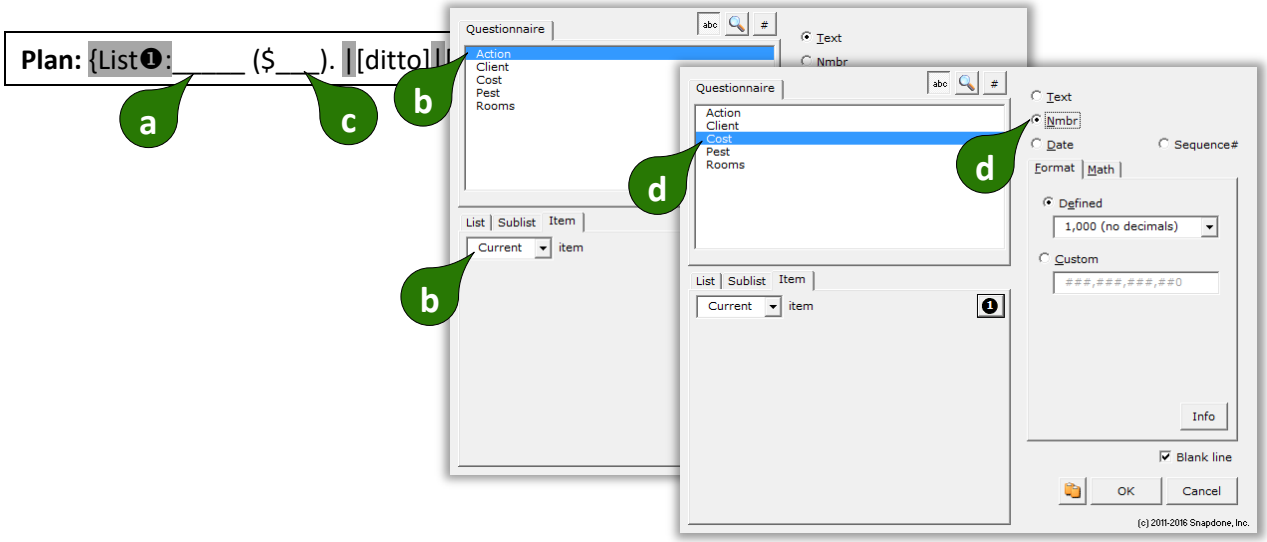
Plan: {List❶:Sample paragraph about {Pest❶X}. |[ditto]|[ditto]}

After

Plan: {List❶:_____ ($___). |[ditto]|[ditto]}

10 Add Fields to the second List

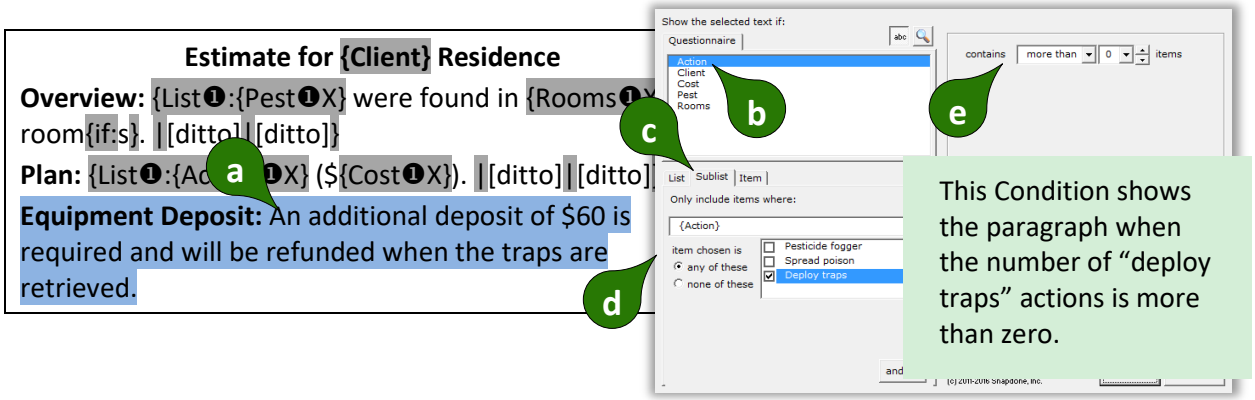
- **a** Select the first blank line and click **Field**
- **b** Select the **Action** answer and **Current** item, and click **OK**
- **c** Select the second blank line and click **Field**
- **d** Select the **Cost** answer and **Nmbr** Field type and click **OK**



We want the final paragraph to appear in the finished document only if the form user has selected **Deploy traps** in the **Action** column of the Grid.

11 Add a Condition

- **a** Select the last paragraph and click **Condition**
- **b** Select the **Action** answer
- **c** Click **Sublist** to include only some of the items in the answer
- **d** Include items where the **{Action}** is **any of these**: **Deploy traps**
- **e** Select the condition **contains more than 0 items** and click **OK**



Our final challenge is the **60** in the last paragraph. We need a Field that provides a particular number from the **Cost** column of the Grid. It has to be the number that appears in the same row as **Deploy traps**, but we don't know whether that will be the first row, last row, or somewhere in between. The solution is to use a Field that is smart enough to locate a particular item in the Grid.

12 A Field that pinpoints a particular Grid item

- **a** Select **60** and click **Field**
- **b** Select the **Cost** answer
- **c** Click **Item** to retrieve a particular item in the answer
- **d** Select the **First** item **in the sublist where** the **{Action}** is **any of these**: **Deploy traps**
- **e** Select the **Nmbr** Field type and click **OK**

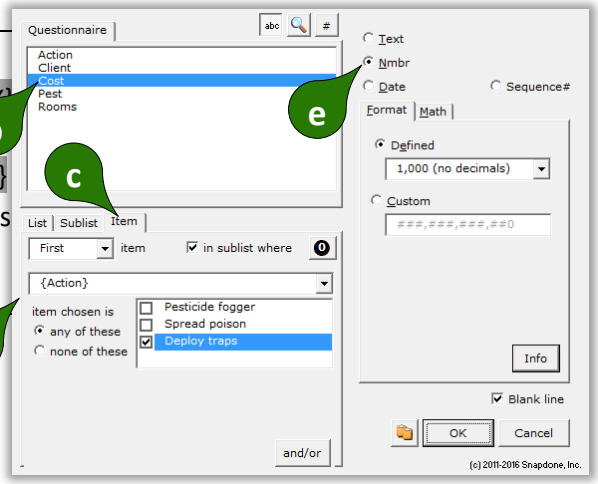
Estimate for {Client} Residence

Overview: {List❶:{Pest❶X} were found in {Rooms❶X
room{if:s}. |[ditto]|[ditto]}

Plan: {List❶:{Action❶X} ($${Cost❶X}). |[ditto]|[ditto]}

{if:Equipment Deposit: An additional deposit of $60 is
re trap
re

This Field will show a particular item in the **Cost** column. The item it selects will be the first item where **Deploy traps** has been selected in the **Action** column.



Before saving this form to be used by others, click **Row/Column**, **Show/Hide** to hide the first column of the Questionnaire and first row of the Grid. This hides material that could be confusing for the form user.

Before

Doxserá (c) 2011-2016

Label	Question	Answer
Client	Client's last name?	

Describe the pests and proposed action:

Pest	Rooms	Action	Cost
Type of pest	**# of rooms**	**Proposed action**	**Price quote**

After

Doxserá (c) 2011-2016

Question	Answer
Client's last name?	

Describe the pests and proposed action:

Type of pest	# of rooms	Proposed action	Price quote

If you need to revise the form later, click **Row/Column**, **Show/Hide** again to reveal the hidden material.

Lesson 12 Lesson 12 Lesson 12

THE PAYOFF

A single Grid provides all the info needed to build two distinct Lists, decide whether a deposit is required, and determine a deposit amount based on particular item within the Grid.

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Question	Answer
Client's last name?	Barclay

Describe the pests and proposed action:

Type of pest	# of rooms	Proposed action	Price quote
Termites	3	Pesticide fogger	150

Estimate for Barclay Residence

Overview: Termites were found in three rooms.

Plan: Pesticide fogger ($150).

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Question	Answer
Client's last name?	Channing

Describe the pests and proposed action:

Type of pest	# of rooms	Proposed action	Price quote
Ants	2	Spread poison	35
Rodents	1	Deploy traps	60

Estimate for Channing Residence

Overview: Ants were found in two rooms. Rodents were found in one room.

Plan: Spread poison ($35). Deploy traps ($60).

Equipment Deposit: An additional deposit of $60 is required and will be refunded when the traps are retrieved.

Lesson 12 Lesson 12 Lesson 12

Lists with Derived Series Answers

Every List is based on a series answer. That includes Text series (page 8), Dropdown series (page 9), Yes/No series (page 12), and Checkboxes (page 13). But don't forget that three types of Derived answers are also series answers that work as the foundation of a List: series of answers (page 14) and series of Passages or Folios (page 14).

Lesson 13: Derived Series Answers

- Text series answer (page 8)
- Checkboxes answer (page 13)
- Text linked series answer (page 8)
- Derived series answer (page 14)

This form reconfigures several separate answers into new Lists.

1 Create the Questionnaire

a Type or copy/paste these paragraphs into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

All family members: _____

All adult family members: _____

All family members who live in the same state as client: _____

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Label	Question	Answer
ClientName	Name of client	
SpouseName	Name of spouse	
ClientState	Client's state of residence	
ChildName	List the children	
ChildMinor	Which of the children are minors?	
ChildState	Each child's state of residence	
WholeFamily	(derived)	
AllAdults	(derived)	
SameState	(derived)	

We're assuming that the first six questions have already been determined by material elsewhere in the form. Now it's our job to create three Derived answers that reconfigure the info that's already been gathered.

2 Create Smart Answers

- **a** Put the cursor in the **ChildName** answer box and click **Smart Answer**
- **b** Select **Series of text boxes** and click **OK**
- **c** Put the cursor in the **ChildMinor** answer box and click **Smart Answer**
- **d** Click the **Checkboxes** answer type
- **e** Select the source **another answer**, **ChildName** and click **OK**
- **f** Put the cursor in the **ChildState** answer box and click **Smart Answer**
- **g** Select **Series of text boxes**
- **h** Checkmark **Link to a preceding series answer or a Grid**
- **i** Select the **ChildName** answer and click **OK**

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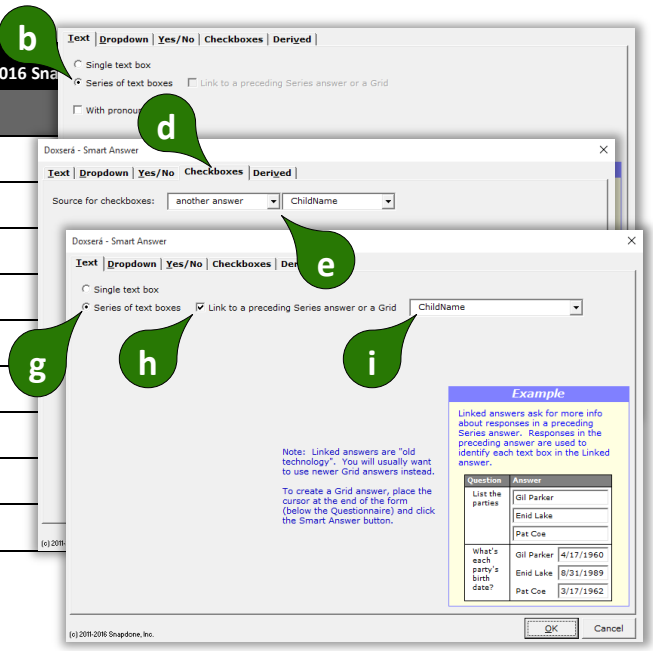
Label	Question	Answer
ClientName	Name of client	
SpouseName	Name of spouse	
ClientState	Client's state of residence	
ChildName	List the children	
ChildMinor	Which children are minors?	
ChildState	Each child's state of residence	
WholeFamily	(derived)	
AllAdults	(derived)	
SameState	(derived)	



3 Derived series of answers

- **a** Put the cursor in the **WholeFamily** answer box and click **Smart Answer**
- **b** Click the **Derived** answer type
- **c** Select **Series**, **Answers**
- **d** Select the **ClientName** answer and click to add it to the series
- Repeat **d** to add the **SpouseName** and **ChildName** answers to the series
- **e** Click **OK**

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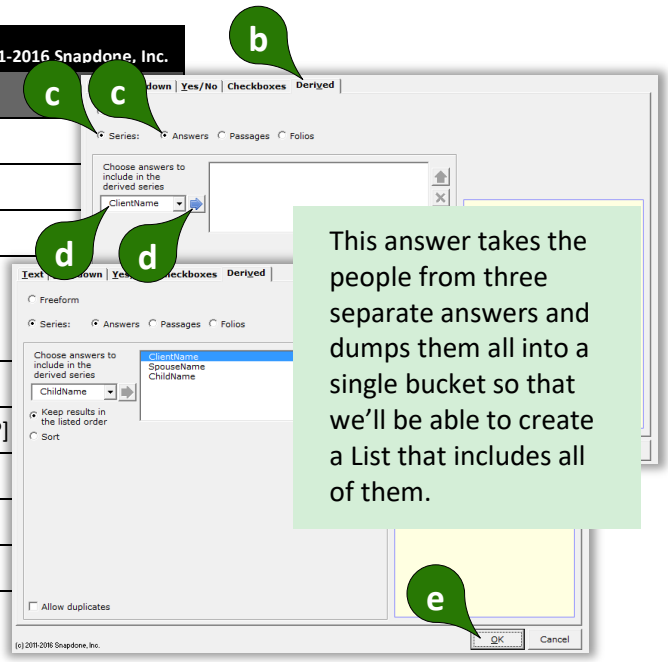
Label	Question	Answer
ClientName	Name of client	
SpouseName	Name of spouse	
ClientState	Client's state of residence	
ChildName	List the children	[??] [??] [??]
ChildMinor	Which children are minors?	☐ [??]
ChildState	Each child's state of residen	??]: [??]
WholeFamily	(derived)	
AllAdults	(derived)	
SameState	(derived)	



This answer takes the people from three separate answers and dumps them all into a single bucket so that we'll be able to create a List that includes all of them.

4 Derived series of answers with a filter

- **a** Put the cursor in the **AllAdults** answer box and click **Smart Answer**
- **b** Click the **Derived** answer type
- **c** Select **Series**, **Answers**
- **d** Select the **ClientName** answer and click to add it to the series
- • Repeat **d** to add the **SpouseName** and **ChildName** answers to the series
- **e** Select **ChildName** in the series
- **f** Click **Some items**
- **g** Choose to only include items where **{ChildMinor} is unchecked**, and click **OK**

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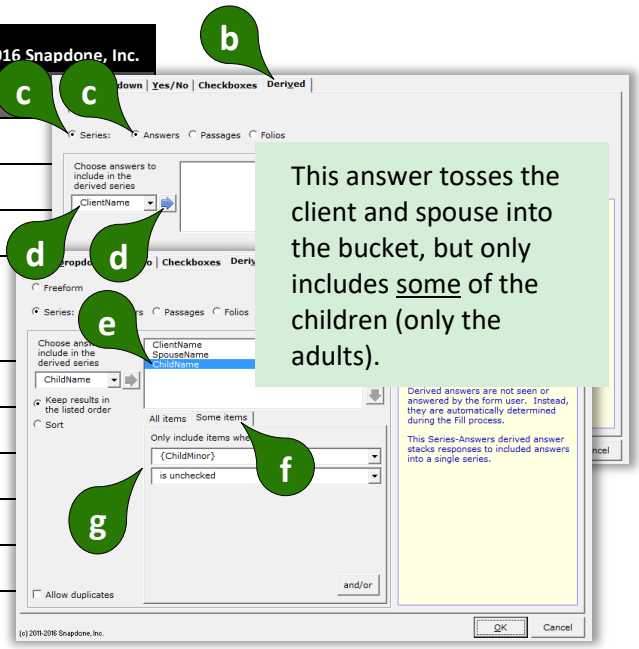
Label	Question	Answer
ClientName	Name of client	
SpouseName	Name of spouse	
ClientState	Client's state of residence	
ChildName	List the children	[??] [??] [??]
ChildMinor	Which children are minors?	☐ [??]
ChildState	Each child's state of residence	[??]: [??]
WholeFamily	(derived)	[??]
AllAdults	(derived)	
SameState	(derived)	



5 Derived series of answers with a flexible filter

- **a** Put the cursor in the **SameState** answer box and click **Smart Answer**
- **b** Click the **Derived** answer type
- **c** Select **Series**, **Answers**
- **d** Select the **ClientName** answer and click to add it to the series
- • Repeat **d** to add the **SpouseName** and **ChildName** answers to the series
- **e** Select **ChildName** in the series
- **f** Click **Some items**
- **g** Choose to only include items where **{ChildState} is this text: {ClientState}**

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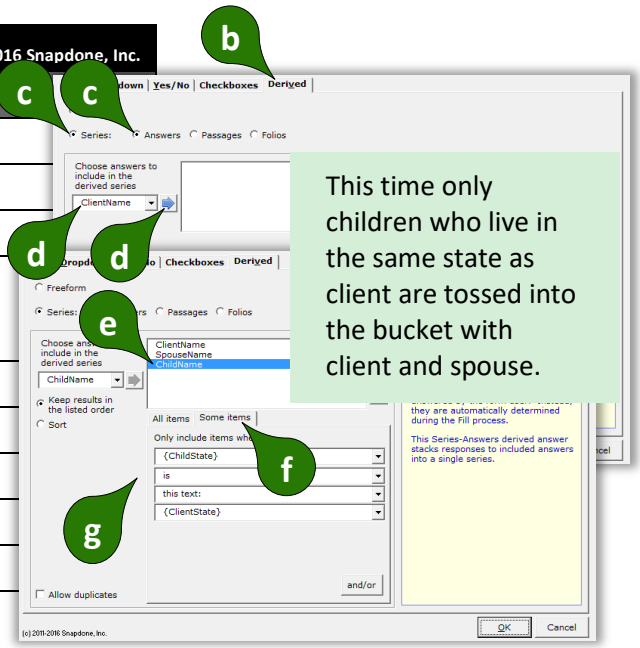
Label	Question	Answer
ClientName	Name of client	
SpouseName	Name of spouse	
ClientState	Client's state of residence	
ChildName	List the children	[??] [??] [??]
ChildMinor	Which children are minors?	☐ [??]
ChildState	Each child's state of residence	[??]: [??]
WholeFamily	(derived)	[??]
AllAdults	(derived)	[??]
SameState	(derived)	



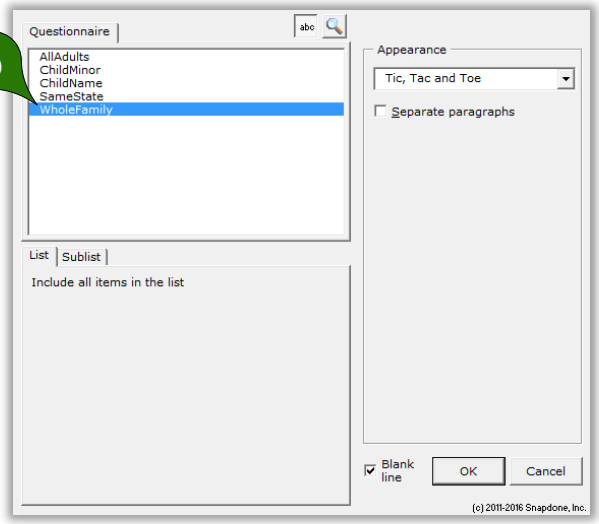
6 Add the Lists

- **a** Select the first blank line and click **List**
- **b** Select the **WholeFamily** answer and click **OK**
- **c** Repeat **a** and **b** to create a similar List with the **AllAdults** answer
- **d** Repeat **a** and **b** to create a similar List with the **SameState** answer

All family members: _____

All adult family members: _____

All family members who live in the same state as client: _____



Before saving this form to be used by others, click **Row/Column**, **Show/Hide** to hide the Derived answers. Since they're processed automatically in the background, they would only confuse the form user if they were left visible.

THE PAYOFF

Even when info is gathered in separate answers, it can be combined to produce cohesive Lists.

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Question	Answer
Name of client	Jerome Purcell
Name of spouse	Ella Purcell
Client's state of residence	Oregon
List the children	Alan Purcell Betty Rawlings Carl Purcell Diane Purcell Ed Purcell
Which of the children are minors?	☐ Alan Purcell ☐ Betty Rawlings ☒ Carl Purcell ☒ Diane Purcell ☐ Ed Purcell
Each child's state of residence	Alan Purcell: Oregon Betty Rawlings: Texas Carl Purcell: Oregon Diane Purcell: Oregon Ed Purcell: Vermont

All family members: Jerome Purcell, Ella Purcell, Alan Purcell, Betty Rawlings, Carl Purcell, Diane Purcell and Ed Purcell

All adult family members: Jerome Purcell, Ella Purcell, Alan Purcell, Betty Rawlings and Ed Purcell

All family members who live in the same state as client: Jerome Purcell, Ella Purcell, Alan Purcell, Carl Purcell and Diane Purcell

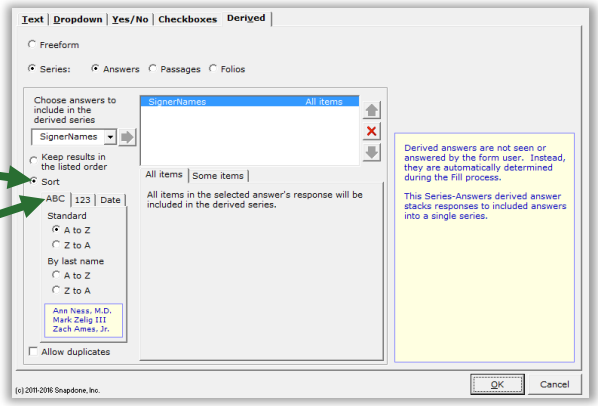
Sorting Lists

When form users respond to a series question, the items may appear in any order. If the form author requires a particular order, the items can be sorted with a Derived series answer.

Sorting is controlled in the Smart Answer screen when creating a Derived series answer.

Click **Sort** to turn on sorting.

Click **ABC** for alphabetical sorting, **123** for numerical sorting (the items in the series must all be numbers), or **Date** for chronological sorting (the items in the series must all be dates). All three methods allow either ascending or descending order.



Alphabetical sorting also allows **By last name** sorting. It is used with a series of names that have been typed "normally," with first names first, last names last, and prefixes and suffixes all in their proper place (**Mr. John Doe**, **Jane X. Smith**, **Dr. Ellen Blake**, **Fred Grant Esq.**, **Sir Perry Reginald Bishop III**, etc.).

Lesson 14: Sorting a List

- Text series answer (page 8)
- Derived series answer (page 14)
- Sort (page 84)

This form sorts a series of names by last name.

1 Create the Questionnaire

a Type or copy/paste this sentence into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

a

The meeting was attended by _____.

b

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Label	Question	Answer
Attend	Who attended the meeting?	
AttendSort	(derived)	

2 Create a series answer

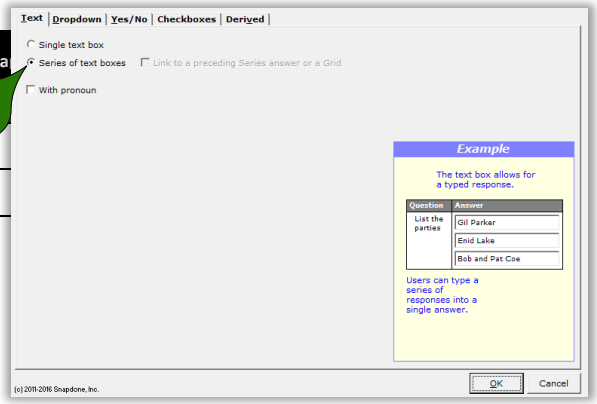
a Put the cursor in the **Attend** answer box and click **Smart Answer**

b Select **Series of text boxes** and click **OK**

Doxserá (c) 2011-2016 Sna

Label	Question	Answer
Attend	Who attended the meeting?	
AttendSort	(derived)	

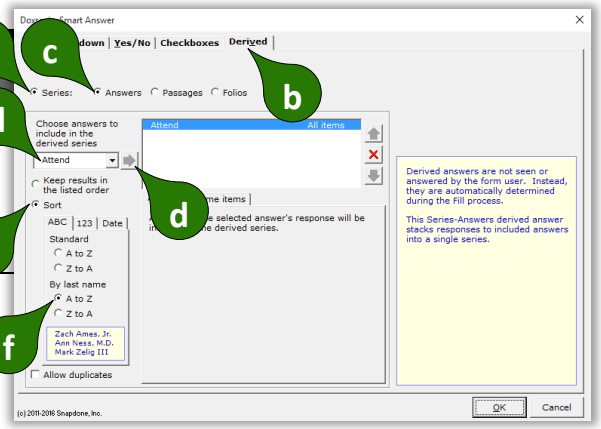
a b



3 Create a sorted Derived series answer

- **a** Put the cursor in the **AttendSort** answer box and click **Smart Answer**
- **b** Click the **Derived** answer type
- **c** Select **Series**, **Answers**
- **d** Select the **Attend** answer and click to add it to the series
- **e** Select **Sort**
- **f** Select to sort **By last name A to Z** and click **OK**

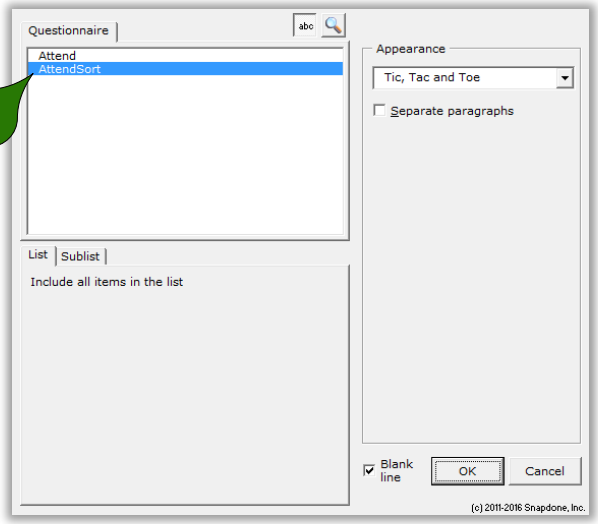
Doxserá (c) 2011-20		
Label	Question	Answer
Attend	Who attended the meeting?	[??] [??] [??]
AttendSort	(derived)	



4 Add a List

- **a** Select the blank line and click **List**
- **b** Select the **AttendSort** answer and click **OK**

The meeting was attended by _____.



Before saving this form to be used by others, click **Row/Column**, **Show/Hide** to hide the Derived answer. Since it's processed automatically in the background, it would only confuse the form user if it were left visible.

Lesson 14 Lesson 14 Lesson 14

THE PAYOFF

As form author, you control the order of items in a List.

Doxserá (c) 2011-2015 Snapdone, Inc.	
Question	**Answer**
Who attended the meeting?	Mr. John Doe Jane X. Smith Dr. Ellen Blake Fred Grant Esq. Sir Perry Reginald Bishop III

The meeting was attended by Sir Perry Reginald Bishop III, Dr. Ellen Blake, Mr. John Doe, Fred Grant Esq. and Jane X. Smith.

Lesson 14 Lesson 14 Lesson 14

Math

Authors

Dox/DB/AwD includes math functions to perform calculations automatically. For example, given a series of shareholders and the number of shares held by each, the form could calculate the total number of outstanding shares and the percentage of the company owned by each shareholder.

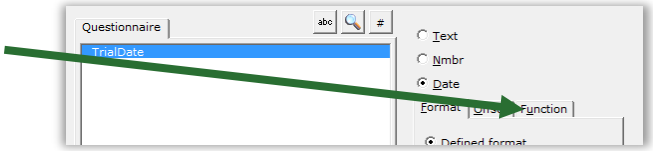
Adding Math to a Field

Number and Count Fields

Begin by creating a Number field (page 16) or a Count Field (page 31). Then click **Math** to open the Math screen.

Date Fields

Begin by creating a Date field (page 17). Then click **Function** to open the Math screen.

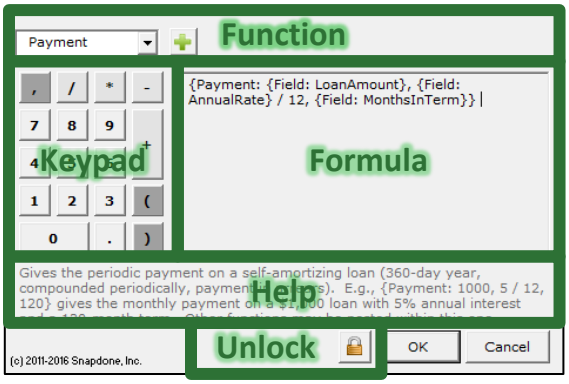


The Math Screen

Formula. Build your math formula here. The formula can be as simple as **1 + 2** or might contain functions within functions within functions.

Function. Functions perform special math duties, like **Days** to count the number of days between two dates, or **Round** to round off a number. To add a function to the formula, select it from the dropdown menu and click ✚.

Keypad. Click these buttons to add numbers and operators (plus, minus, etc.) to the formula. You may also type numbers and symbols on your keyboard. Use * for multiplication and / for division.



Help. This area describes the currently selected function and gives pointers on its use.

Unlock. Click 🔒 to turn on freeform editing mode. Expert users may find this mode more convenient so they can type the formula directly (or copy and paste from another source) rather than selecting functions from a menu.

> **What's with all the curly braces?** You may have noticed that math formulae contain lots of curly braces: **{ }**. They show where each math function begins and ends. But you don't need to worry about typing the curly braces – they are automatically included each time you add a function to the formula.

Lesson 15 Lesson 15 Lesson 15

Lesson 15: Math Fields

- Number Field (page 16)
- Math (page 87)
- Field function (page 99)
- Payment function (page 103)

This form calculates monthly loan payments.

1 Create the Questionnaire

a Type or copy/paste this sentence into a blank document

- Click **Questionnaire**, ✚ **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

The loan amount is $___, to be paid in ___ monthly payments of $___ each.

a

b

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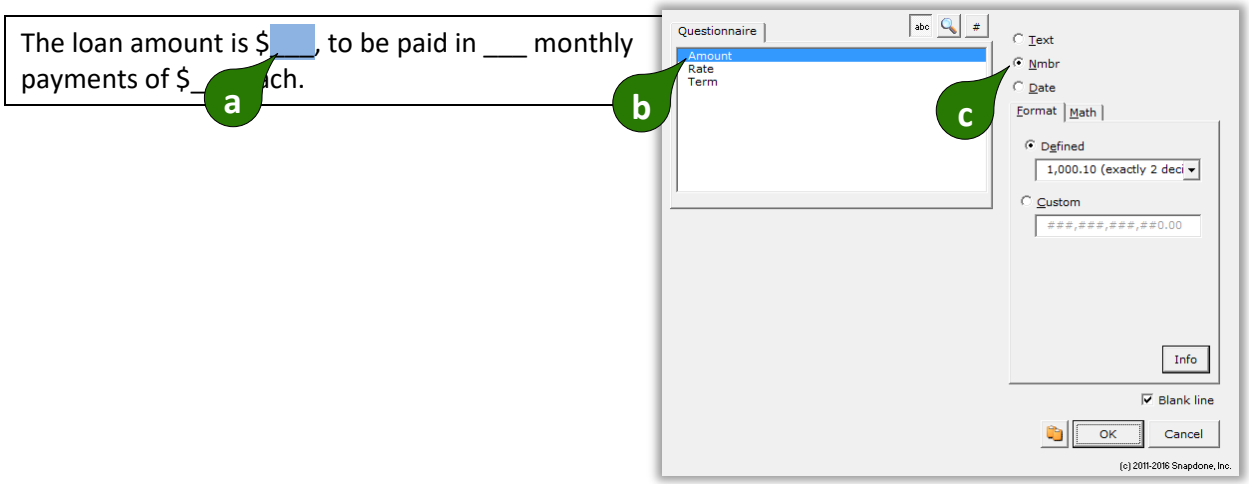
Label	Question	Answer
Amount	Amount of loan?	
Rate	Annual Interest rate?	
Term	How many years long is the loan term?	

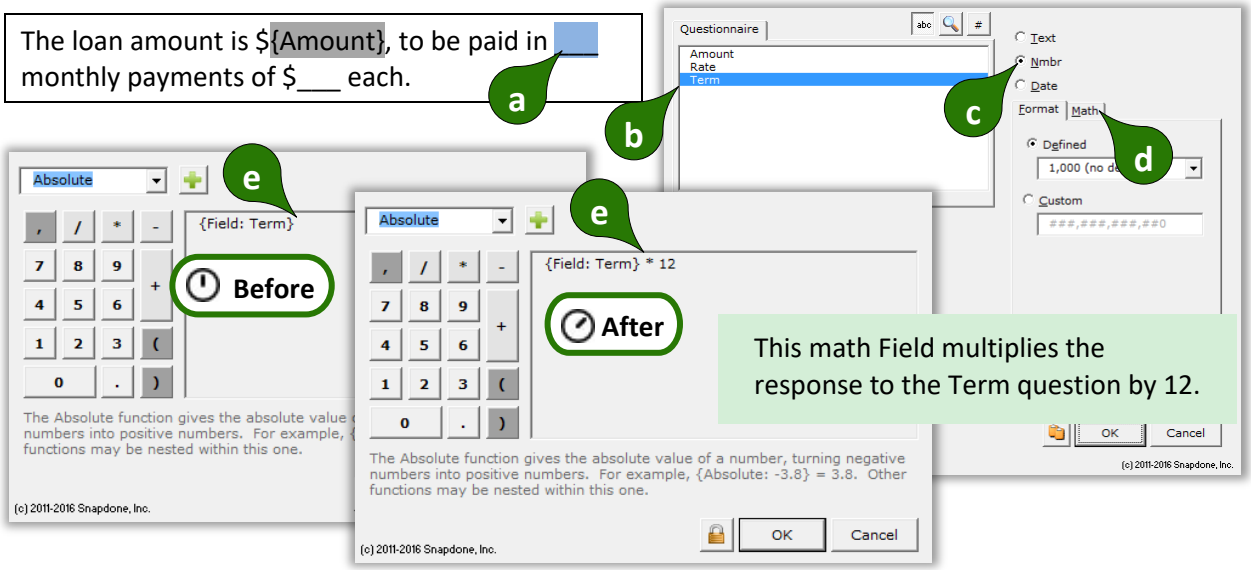
2 Add a basic Field

- **a** Select the first blank line and click **Field**
- **b** Select the **Amount** answer
- **c** Select the **Nmbr** Field type and click **OK**



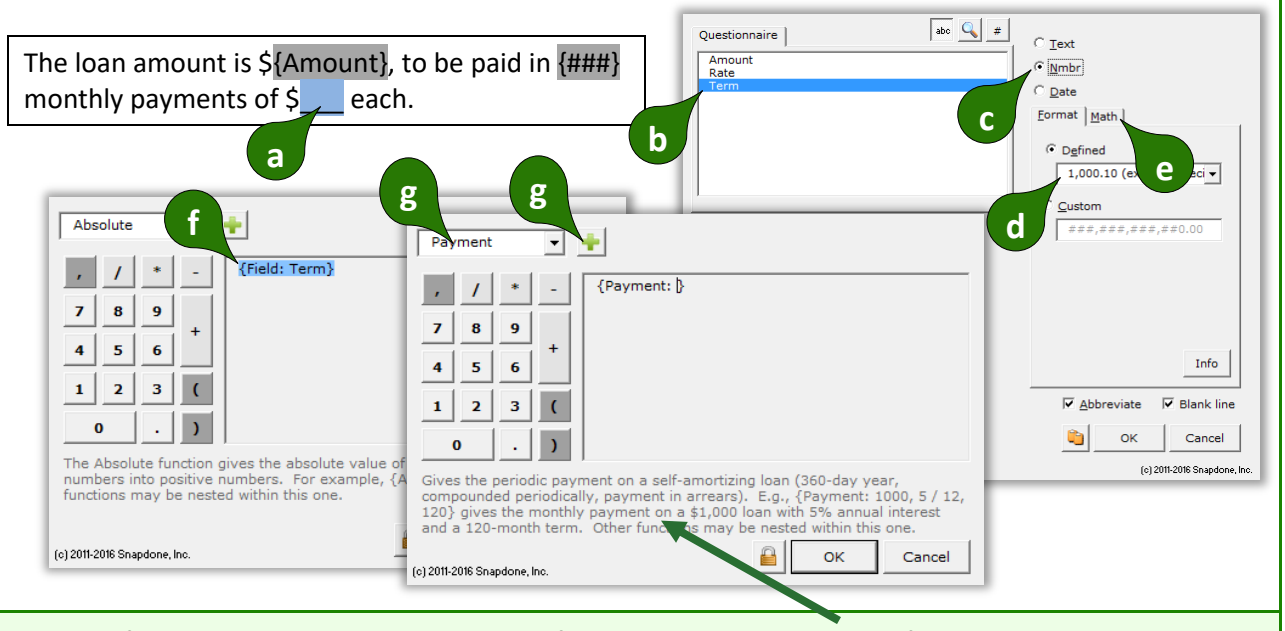
3 Add a simple math Field

- **a** Select the next blank line and click **Field**
- **b** Select the **Term** answer
- **c** Select the **Nmbr** Field type
- **d** Click **Math** to open the Math screen
- **e** Type ***12** at the end of the formula (the asterisk means multiply), then click **OK** to close the Math screen and **OK** again to close the Field screen



4 Add a math Field that uses the Payment function

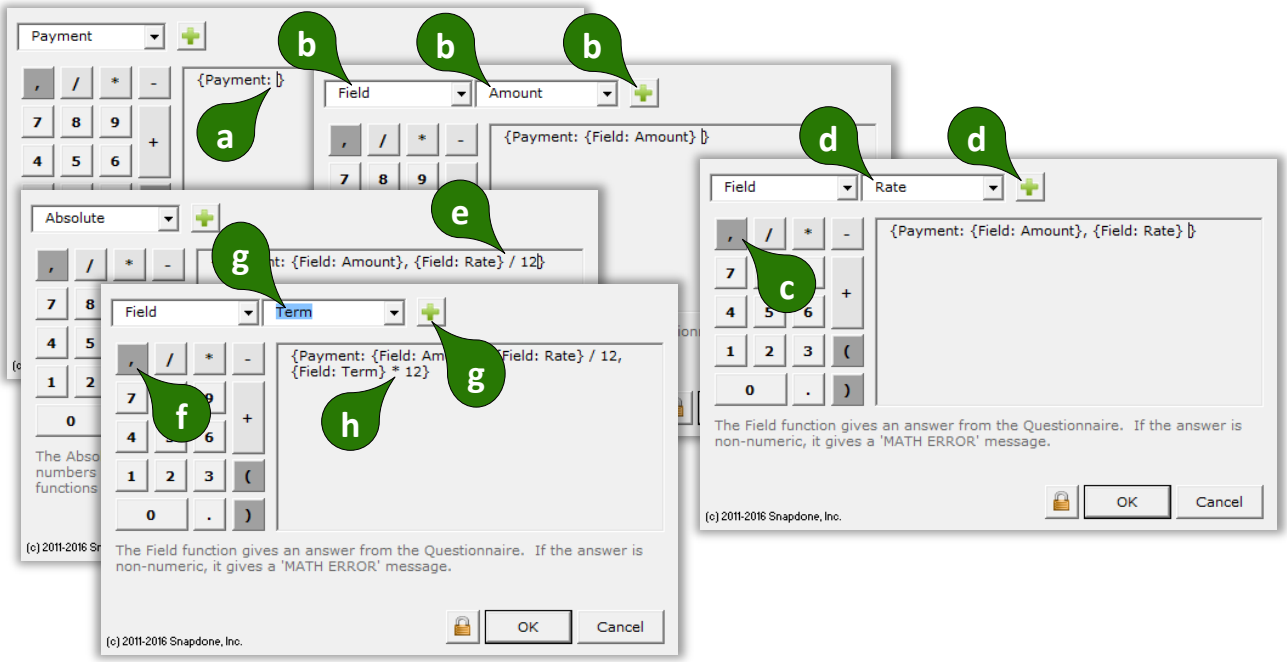
- **a** Select the last blank line and click **Field**
- **b** Select the **Term** answer
- **c** Select the **Nmbr** Field type
- **d** Select the **1,000.10 (exactly 2 decimals)** format
- **e** Click **Math** to open the Math screen
- **f** Delete the function **{Field: Term}** to start with a clean slate
- **g** Select the **Payment** function and click to add it to the formula
- Don't close this screen yet — more to come in the next step



Most math functions require some additional info. The tip in the lower part of the screen tells us the Payment function requires three numbers separated by commas: loan amount, periodic interest rate, and the number of periods in the term of the loan. Those numbers can either be typed directly into the formula or they can be represented with other functions. In this form, we'll use a Field function to provide each of the three numbers the Payment function requires.

5 Add three functions within the Payment function

- **a** Start with the cursor inside the Payment function where the loan amount is required
- **b** Select the **Field** function, the **Amount** Field, and click ✚ to add it to the formula
- **c** Click the comma button (or type a comma with your keyboard)
- **d** Select the **Rate** Field and click ✚ to add it to the formula
- **e** Type **/12** to divide the annual rate into the monthly rate required by the Payment function
- **f** Click the comma button (or type a comma with your keyboard)
- **g** Select the **Term** Field and click ✚ to add it to the formula
- **h** Type ***12** to convert the **Term** response to a number of months, then click **OK** to close the Math screen and **OK** again to close the Field screen



THE PAYOFF

When the form user supplies loan amount, annual interest rate, and loan term, the number of payments and monthly payment are calculated automatically.

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Label	Question	Answer
Amount	Amount of loan?	150,000
Rate	Annual interest rate?	4.5
Term	How many years long is the loan term?	20

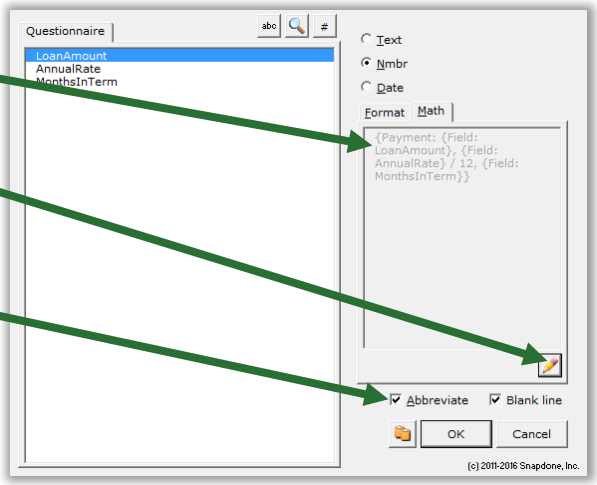
The loan amount is $150,000, to be paid in 240 monthly payments of $948.97 each.

The Math Tab

After a formula is created in the Math screen, it appears here on the Math tab (or the Function tab for Date Fields).

Click to return to the Math screen if more editing is needed.

The **Abbreviate** checkbox has no effect on finished documents, but improves form readability by displaying **{###}** instead of the full formula.



Math Functions

Math mavens read on for a complete catalog of **Dox**/**DB**/**AwD** math functions. (Those of us who napped through Algebra might want to skip this bit.)

Add, Subtract, Multiply, Divide

Symbols for basic math are just as you expect:

- **+** Addition. For example: **5 + 2 = 7**
- **-** Subtraction. For example: **5 - 2 = 3**
- ***** Multiplication. For example: **5 * 2 = 10**
- **/** Division. For example: **5 / 2 = 2.5**
- **( )** Parentheses control the order of operations. For example: **(1 + 2) * 3 = 9**, but **1 + (2 * 3) = 7**

> **Dates are not numbers.** You might be tempted to use addition and subtraction to calculate date offsets, but don't. The result would be a "MATH ERROR" message. Instead, use Date Offsets (page 17), which are waaaay more flexible than addition and subtraction.

Absolute

The **Absolute** function gives the absolute value of a number, turning negative numbers into positive numbers. For example, **{Absolute: -3.8}** = 3.8. Other functions may be nested within this one. For example, if the Questionnaire asks for PriceA and PriceB, the difference between the two prices is **{Absolute: {Field: PriceA} - {Field: PriceB}}**.

In the Formula	Plain English
{Absolute: *number*}	The absolute value of a number

Age

Given a person's birthdate, the **Age** function gives their age on a particular date. *Note that the age depends on whether or not the birthday has already occurred in the target year.* For example, **{Age: 4/17/2000, 4/17/2010}** = 10 because the birthday has occurred in 2010; while **{Age: 4/17/2000, 4/16/2010}** = 9 because the birthday has not yet occurred in 2010. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one. The **Age** function is often used to calculate a person's age on the date when the form is used, with a formula like this: **{Age: {Field: DOB}, {Now}}**.

In the Formula	Plain English
{Age: *date1*, *date2*}	Someone born on Date1 is this old on Date2

Lesson 16 Lesson 16 Lesson 16

Lesson 16: Dates, Math, and Derived Answers

- Freeform Derived answer (page 13)
- Number Field (page 16)
- Math (page 87)
- Age function (page 93)
- Field function (page 99)
- Now function (page 103)
- A/An Condition (page 46)

Given a birthdate, this form determines age and minor/adult status.

1 Create the Questionnaire

a Type or copy/paste this sentence into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

a The beneficiary is a minor/adult, age ___.

b

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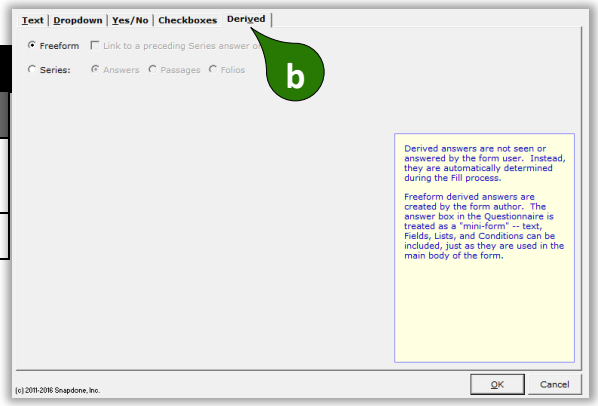
Label	Question	Answer
DOB	What's the beneficiary's birthdate?	
Age	(derived)	

2 Create Derived answer

- **a** Put the cursor in the **Age** answer box and click **Smart Answer**
- **b** Click the **Derived** answer type and click **OK**

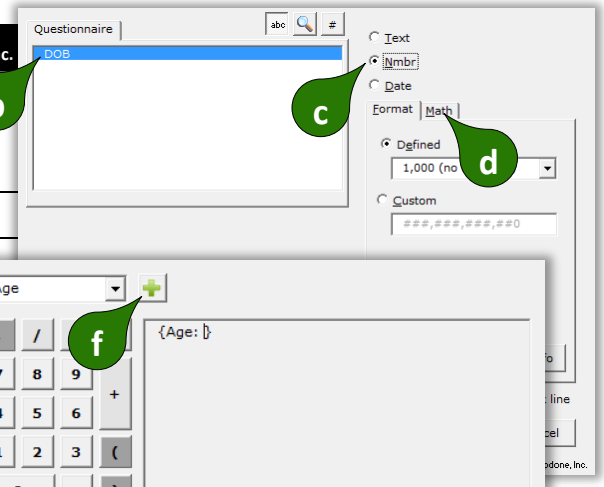
Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**
DOB	What's the beneficiary's birthdate?	
Age	(derived)	

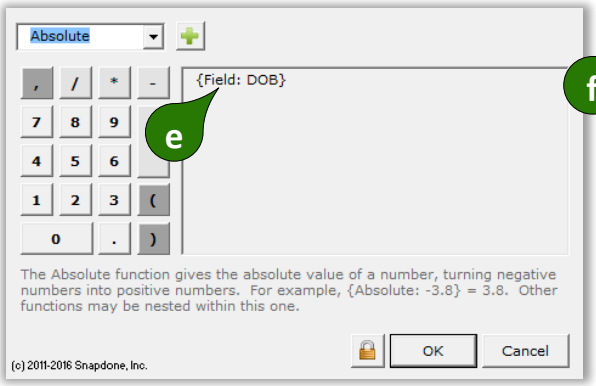


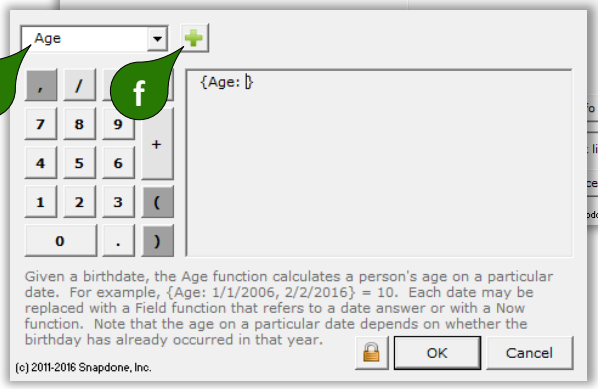
3 Add a Field with Age function

- **a** Put the cursor in the **Age** answer box and click **Field**
- **b** Select the **DOB** answer
- **c** Select the **Nmbr** Field type
- **d** Click **Math** to open the Math screen
- **e** Delete the **{Field: DOB}** function to start with a clean slate
- **f** Select the **Age** function and click to add it to the formula
- Don't close this screen yet — more to come in the next step

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**
DOB	What's the beneficiary's birthdate?	
Age	(derived)	



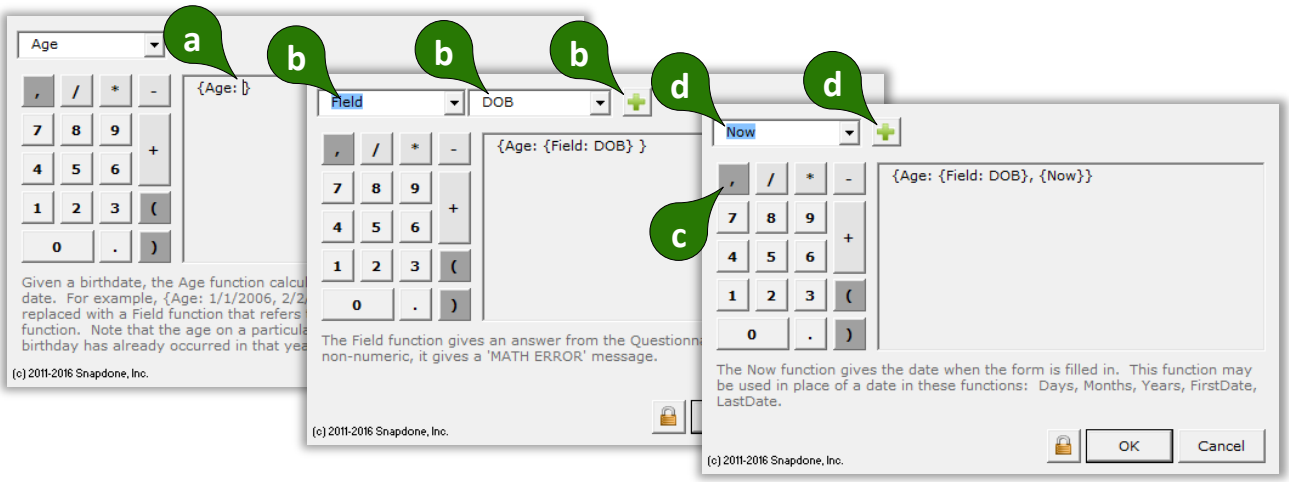




The **Age** function uses a birthdate to calculate a person's age on a target date. The birthdate will be provided with a **Field** function, and the target date will be **Now** (the day the form is used).

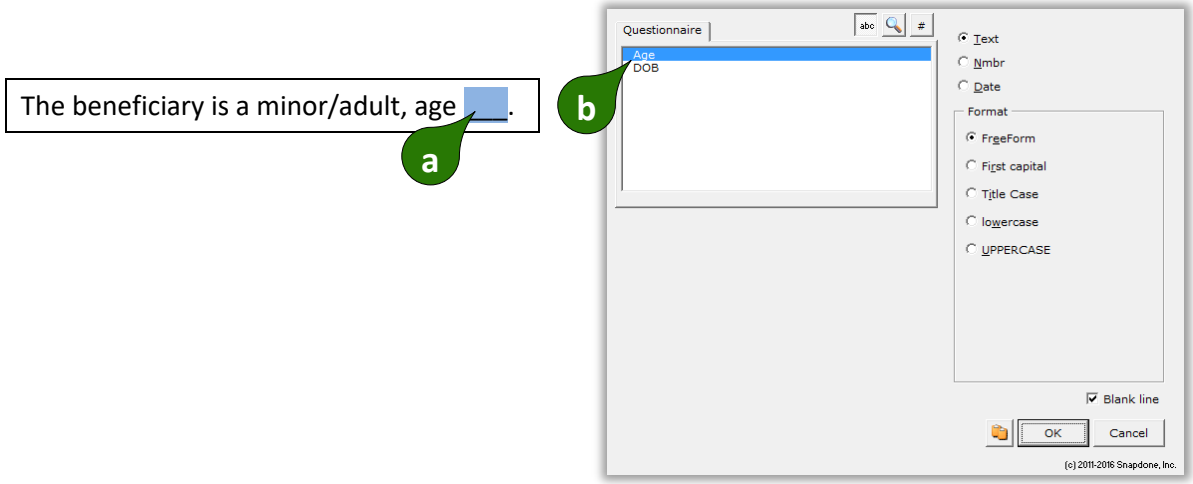
4 Add two functions within the Age function

- **a** Put the cursor inside the **Age** function where the birthdate is required
- **b** Select the **Field** function and **DOB** Field, and click ✚ to add it to the formula
- **c** Click the comma button (or type a comma with your keyboard)
- **d** Select the **Now** function and click ✚ to add it to the formula, then click **OK** to close the Math screen and **OK** again to close the Field screen



5 Add a Field to the Form

- **a** Select the blank line and click **Field**
- **b** Select the **Age** answer and click **OK**



6 Add opposing Conditions to the Form

- **a** Select **minor** and click **Condition**
- **b** Select the **Age** answer
- **c** Select the condition **is less than 18** and click **OK**
- **d** Delete the slash
- **e** Select **adult** and click **Condition**
- **f** Select the **Age** answer
- **g** Select the condition **is more than 17** and click **OK**

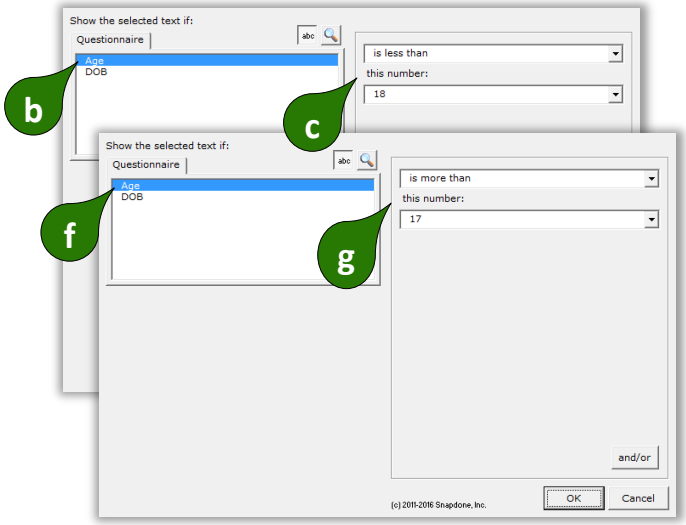
a

The beneficiary is a minor/adult, age {Age}.

d

The beneficiary is a {if:minor}/adult, age {Age}.

e



One more challenge remains in this surprisingly recalcitrant sentence, though it's an obscure one.

The beneficiary is a {if:minor}{if:adult}, age {Age}.

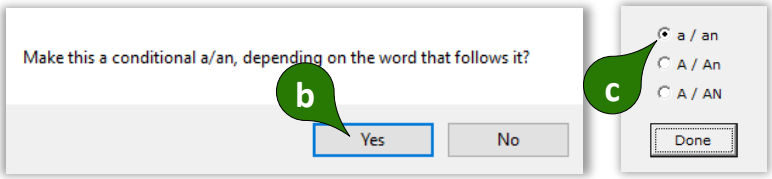
When the beneficiary is a minor, **a** is fine. But when the beneficiary is an adult, **a** should change to **an**.

7 A/An Condition

- **a** Select the **a** and click **Condition**
- **b** Click **Yes**
- **c** Select **a/an** and click **Done**

a

The beneficiary is a {if:minor}{if:adult}, age {Age}.



Before saving this form to be used by others, click **Row/Column**, **Show/Hide** to hide the Derived answer. Since it's processed automatically in the background, it would only confuse the form user if it were left visible.

Lesson 16 Lesson 16 Lesson 16

THE PAYOFF

The date of birth only needs to be entered once. When it is used in forms today, next month, and next year, the age and adult/minor designation will always be correct.

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Label	Question	Answer
DOB	What's the beneficiary's birthdate?	8/31/2013

The beneficiary is a minor, age 2.

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Label	Question	Answer
DOB	What's the beneficiary's birthdate?	8/31/1990

The beneficiary is an adult, age 25.

Lesson 16 Lesson 16 Lesson 16

Constant

The **Constant** function gives one of two math constants (*e* or *pi*), accurate to the 14th decimal place.

In the Formula	Plain English
{Constant: *name*}	A mathematical constant

Days

The **Days** function gives the number of days between two dates. For example, **{Days: 1/31/2011, 2/3/2011}** = 3. Dates should use month/day/year format; both two-digit and four-digit years are allowed. If date1 is the same as date2, the result is zero. If date2 is earlier than date1, the result is a negative number. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **Now**, and others) may be nested within this one. For example, if the Questionnaire asks for a ClosingDate, then **{Days: {Now}, {Field: ClosingDate}}** gives the number of days between the closing date and the date on which the form is used. (This will be a negative number if the closing date precedes the date when the form is used.)

In the Formula	Plain English
{Days: *date1*, *date2*}	The number of days between two dates

DerivedCount

The **DerivedCount** function is only available if the Questionnaire contains a Derived answer. It gives the number items in a Derived answer. Items must be separated by hard returns (each item on a separate line).

In the Formula	Plain English
{DerivedCount: *label*}	Count the number of items in a Derived answer

DerivedFirstDate

The **DerivedFirstDate** function is only available if the Questionnaire contains a Derived answer. It gives the earliest date in a Derived answer. Dates must be separated by hard returns (each date on a separate line).

In the Formula	Plain English
{DerivedFirstDate: *label*}	The earliest date in a Derived answer

DerivedLastDate

The **DerivedLastDate** function is only available if the Questionnaire contains a Derived answer. It gives the latest date in a Derived answer. Dates must be separated by hard returns (each date on a separate line).

In the Formula	Plain English
{DerivedLastDate: *label*}	The latest date in a Derived answer

DerivedMax

The **DerivedMax** function is only available if the Questionnaire contains a Derived answer. It gives the largest number in a Derived answer. Numbers must be separated by hard returns (each number on a separate line).

In the Formula	Plain English
{DerivedMax: *label*}	The biggest number in a Derived answer

DerivedMin

The **DerivedMin** function is only available if the Questionnaire contains a Derived answer. It gives the smallest number in a Derived answer. Numbers must be separated by hard returns (each number on a separate line).

In the Formula	Plain English
{DerivedMin: *label*}	The smallest number in a Derived answer

DerivedMultiply

The **DerivedMultiply** function is only available if the Questionnaire contains a Derived answer. It gives the product of all numbers in a Derived answer multiplied together. Numbers must be separated by hard returns (each number on a separate line).

In the Formula	Plain English
{DerivedMultiply: *label*}	Multiply all the numbers in a Derived answer together

DerivedSum

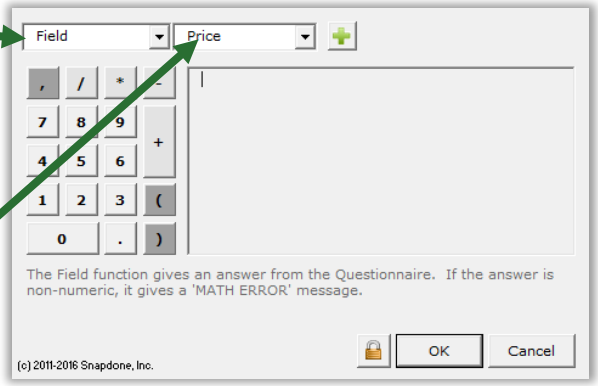
The **DerivedSum** function is only available if the Questionnaire contains a Derived answer. It gives the sum of all numbers in a Derived answer added together. Numbers must be separated by hard returns (each number on a separate line).

In the Formula	Plain English
{DerivedSum: ***label*****}**	Add all the numbers in a Derived answer together

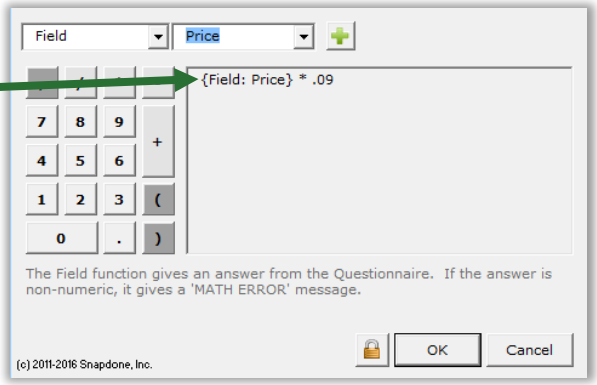
Field

The **Field** function gives an answer from the Questionnaire. If the answer is non-numeric (for example, if someone types **five dollars** as the answer to your **Price** question), a **MATH ERROR** message appears.

After selecting **Field** in the first box, select a particular Field name in the second box.



For example, if the Questionnaire includes a question labeled **Price**, then sales tax could be computed with this formula (assuming the sales tax is 9%).



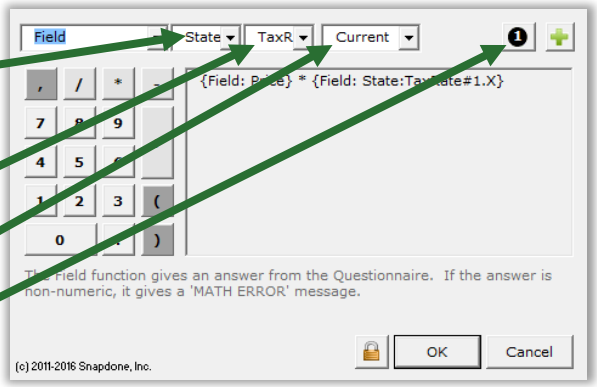
Additional controls appear when needed. In the example shown here:

The **State** Field is selected.

The State answer is a dropdown that uses a Master List (page 119) as its source, and the Master List includes a column labeled **TaxRate**.

The Field appears within a List, and the **Current** item in the list is selected (page 63).

The Field is in List Layer **1** (page 54).



In the Formula	Plain English
{Field: ***label*****}**	The answer to a question in the Questionnaire

FirstDate

The **FirstDate** function gives the earliest of a series of dates, ignoring items that are not dates. For example, **{FirstDate: 5/5/2011, 3/15/2011, 2/20/2012}** = 3/15/2011. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one. For example, if today's date is 3/12/2017 and the CommencementDate in the Questionnaire is 4/1/2017, then **{FirstDate: {Now}, {Field: CommencementDate}, 3/15/2017}** = 3/12/2017.

In the Formula	Plain English
{FirstDate: ***date1, date2, … dateX*****}**	The earliest of these dates

Integer

The **Integer** function gives the integer portion of a number, truncating any decimal portion. For example, **{Integer: 3.84}** = 3. Other functions may be nested within this one. For example, if the Questionnaire asks for an EggCount, the form can compute the number of 3-egg omelets with **{Integer: {Field: EggCount} / 3}**.

In the Formula	Plain English
{Integer: ***number*****}**	Convert a number to an integer, ignoring any fractional portion

LastDate

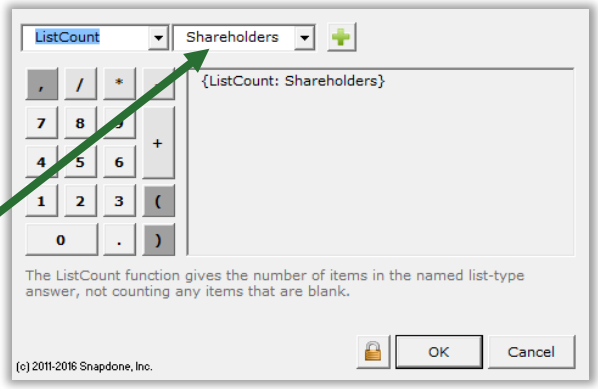
The **LastDate** function gives the latest of a series of dates, ignoring items that are not dates. For example, **{LastDate: 5/5/2011, 2/20/2012, 3/15/2011}** = 2/20/2012. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one. For example, if today's date is 3/12/2017 and the CommencementDate in the Questionnaire is 4/1/2017, then **{LastDate: {Now}, {Field: CommencementDate}, 3/15/2017}** = 4/1/2017.

In the Formula	Plain English
{LastDate: ***date1, date2, … dateX*****}**	The latest of these dates

ListCount

The **ListCount** function is only available if the Questionnaire contains a series answer. It gives the number of items in a series answer, not counting any items that are blank. If all items are blank, the result is zero.

When one of the List functions is selected (**ListCount**, **ListFirstDate**, **ListItem#**, **ListLastDate**, **ListMax**, **ListMin**, **ListMultiply**, **ListSum**), choose a particular series answer in the second box.



In the Formula	Plain English
{ListCount: ***label*****}**	Count the number of items in a series answer

ListFirstDate

The **ListFirstDate** function is only available if the Questionnaire contains a series answer. It gives the earliest date in a series answer, ignoring items that are not dates. If none of the items in the series is a date, an **ERROR - DATE FORMAT** message appears.

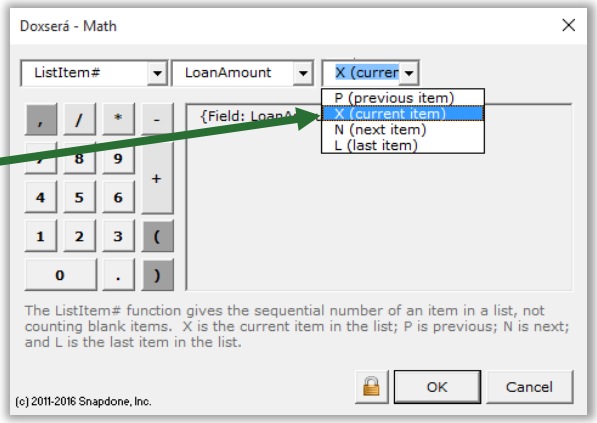
In the Formula	Plain English
{ListFirstDate: ***label*****}**	The earliest date in a series answer

ListItem#

The **ListItem#** function is only available when creating a Field within a List. It gives the sequential position of a List item, not counting blank items.

Use **X** for the position of the current item; **P** for the previous item; **N** for the next item; and **L** for the last item in the List.

For example, if a series answer in the Questionnaire contains 5 non-blank items, **{ListItem#: L}** = 5.



In the Formula	Plain English
{ListItem#: ***item*****}**	The position of an item in a series answer

ListLastDate

The **ListLastDate** function is only available if the Questionnaire contains a series answer. It gives the latest date in a series answer, ignoring items that are not dates. If none of the items in the series is a date, an **ERROR - DATE FORMAT** message appears.

In the Formula	Plain English
{ListLastDate: ***label*****}**	The latest date in a series answer

ListMax

The **ListMax** function is only available if the Questionnaire contains a series answer. It gives the largest number in a series answer, ignoring items that are blank or non-numeric. If none of the items in the series is a number, a **MATH ERROR** message appears.

In the Formula	Plain English
{ListMax: ***label*****}**	The biggest number in a series answer

ListMin

The **ListMin** function is only available if the Questionnaire contains a series answer. It gives the smallest number in a series answer, ignoring items that are blank or non-numeric. If none of the items in the series is a number, a **MATH ERROR** message appears.

In the Formula	Plain English
{ListMin: ***label*****}**	The smallest number in a series answer

ListMultiply

The **ListMultiply** function is only available if the Questionnaire contains a series answer. It gives the product of all numbers in a series multiplied together, ignoring items that are blank or non-numeric. If none of the items in the series is a number, a **MATH ERROR** message appears.

In the Formula	Plain English
{ListMultiply: *label*}	Multiply all the numbers in a series answer together

ListSum

The **ListSum** function is only available if the Questionnaire contains a series answer. It gives the sum of all numbers in a series added together, ignoring items that are blank or non-numeric. If none of the items in the series is a number, a **MATH ERROR** message appears.

In the Formula	Plain English
{ListSum: *label*}	Add all the numbers in a series answer together

Logarithm

The **Logarithm** function gives the base *n* logarithm of a number. For example, **{Logarithm: 10, 100}** gives the base 10 logarithm of 100. Other functions may be nested within this one. To calculate natural logarithms, use the **{Constant: e}** function as the base number. For example, the natural logarithm of 100 is **{Logarithm: {Constant: e}, 100}**.

In the Formula	Not-So-Plain English
{Logarithm: *n*, *number*}	The base *n* logarithm of a number

Maximum

The **Maximum** function gives the largest of a series of numbers. For example, **{Maximum: 5, 10, 3}** = 10. Other functions may be nested within this one. For example, if the Questionnaire asks for Income and two possible tax rates – TaxRateA and TaxRateB – then the largest possible amount of tax owed is **{Maximum: {Field: TaxRateA} * {Field: Income}, {Field: TaxRateB} * {Field: Income}}**.

In the Formula	Plain English
{Maximum: *number1*, *number2*, … *numberX*}	The biggest of these numbers

Minimum

The **Minimum** function gives the smallest of a series of numbers. For example, **{Minimum: 5, 3, 10}** = 3. Other functions may be nested within this one. For example, if the shipping and handling fee is 3% of the purchase price, but not to exceed $7.50, use **{Minimum: {Field: Price} * .03, 7.50}**.

In the Formula	Plain English
{Minimum: *number1*, *number2*, … *numberX*}	The smallest of these numbers

Months

The **Months** function gives the number of months between two dates. *This function counts transitions from month to month, not the number of elapsed days divided by 30.* For example, **{Months: 1/31/2011, 3/3/2011}** = 2. If both dates occur in the same month, the result is zero. If date2 is in an earlier month than date1, the result is a negative number. The **Field** function (if it refers to a date answer) and other

date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one. For example, if the Questionnaire asks for a ClosingDate, then **{Months: {Now}, {Field: ClosingDate}}** gives the number of months between the closing date and the date on which the form is used. (This will be a negative number if the closing date precedes the date when the form is used.)

In the Formula	Plain English
{Months: *date1*, *date2*}	The number of months between two dates

Now

The **Now** function gives the date when the form is filled in. It may be used by itself or inside a date function: **Days**, **Months**, **Years**, **FirstDate**, **LastDate**.

In the Formula	Plain English
{Now}	The date when the form is filled in

Payment (PMT)

The **Payment** function gives the periodic payment on a self-amortizing loan, assuming 360-day years, interest compounded periodically, payment in arrears. For example, **{Payment: 1000, 5 / 12, 120}** gives the monthly payment on a $1,000 loan with a 5% annual rate of interest and a 120-month term. Other functions may be nested within this one. For example, if the Questionnaire asks for LoanAmount, AnnualRate, and MonthsInTerm, then the monthly payment could be computed as **{Payment: {Field: LoanAmount}, {Field: AnnualRate} / 12, {Field: MonthsInTerm}}**.

In the Formula	Plain English
{Payment: *amount*, *rate*, *term*}	Calculates the periodic payment amount when given the loan amount, interest rate per period, and number of periods in the loan term

RaiseToPower (exponentiation)

The **RaiseToPower** function performs exponentiation, multiplying a number by itself a number of times. For example, **{RaiseToPower: 8, 3}** = 512, because 8 x 8 x 8 = 512. Other functions may be nested within this one. For example, if the Questionnaire asks for the Length of a square plot of land, the acreage equals the Length squared: **{RaiseToPower: {Field: Length}, 2}**.

In the Formula	Plain English
{RaiseToPower: *number*, *exponent*}	Multiply a number by itself a number of times

Remainder (modulo)

The **Remainder** function gives the remainder value after division. For example, **{Remainder: 10, 3}** = 1, because 10 divided by 3 leaves a remainder of 1. Other functions may be nested within this one. For example, if the Questionnaire asks for a List of People to be split into 4 equal groups, the number of leftover people is **{Remainder: {ListCount: People}, 4}**.

In the Formula	Plain English
{Remainder: *dividend*, *divisor*}	The remainder that's left over after dividing a number by another number

Root

The **Root** function gives the *n*th root of a number (square root is 2nd root; cube root is 3rd root, etc.). For example, the square root of 9 is **{Root: 2, 9}**; and the cube root of 125 is **{Root: 3, 125}**. Other functions may be nested within this one. For example, according to the Pythagorean Theorem, if the Questionnaire asks for the lengths of Leg1 and Leg2 of a right triangle, then the length of the hypotenuse is **{Root: 2, {RaiseToPower: {Field: Leg1}, 2} + {RaiseToPower: {Field: Leg2}, 2}}**.

In the Formula	Not-So-Plain English
{Root: *n*, *number*}	The *n*th root of a number

Round

The **Round** function rounds a number to the nearest integer. Halves are rounded up. For example, **{Round: 5.4}** = 5; and **{Round: 5.5}** = 6. Other functions may be nested within this one. For example, if the Questionnaire asks for a List of SharesHeld by each shareholder, then the average number of shares held by each shareholder is approximately **{Round: {ListSum: SharesHeld} / {ListCount: SharesHeld}}**.

In the Formula	Plain English
{Round: *number*}	Round off a number

Years

The **Years** function gives the number of years between two dates. *This function counts transitions from year to year, not the number of elapsed days divided by 365.* For example, **{Years: 12/31/2010, 1/1/2012}** = 2. If date1 is in the same year as date2, the result is zero. If date2 is in an earlier year than date1, the result is a negative number. The **Field** function (if it refers to a date answer) and other date functions (**FirstDate**, **LastDate**, **ListFirstDate**, **ListLastDate**, **Now**) may be nested within this one.

In the Formula	Plain English
{Years: *date1*, *date2*}	The number of years between two dates

Math in Lists

Among the subjects included in the everything-but-the-kitchen-sink lesson below, see how item Fields become important when using Math within Lists.

Lesson 17: List in Table Format, Master List, and Math

- Master List (page 119)
- Dropdown series answer (page 9)
- List formatted as table (page 50)
- Date Field (page 17)
- Number Field (page 16)
- Math (page 87)
- Field function (page 99)

This form asks just one question to produce a neatly tabulated invoice.

We'll create a form that produces finished documents like this:

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
Basic Personhood	3/3/2012	125	11.00	136.00
Advanced Humanity	3/17/2012	200	17.60	217.60
TOTAL:				$353.60

Payment is due one week before the class date.

1 Create the Questionnaire

a Type or copy/paste this text into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

Thank you for registering for the following classes:

Payment is due one week before the class date.

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Label	Question	Answer
Classes	List the classes registered	

Rather than make the form user type a lot of dates and tuition fees, we'll create a Master List of classes that can be maintained and updated in one place, and used by this form and other forms too.

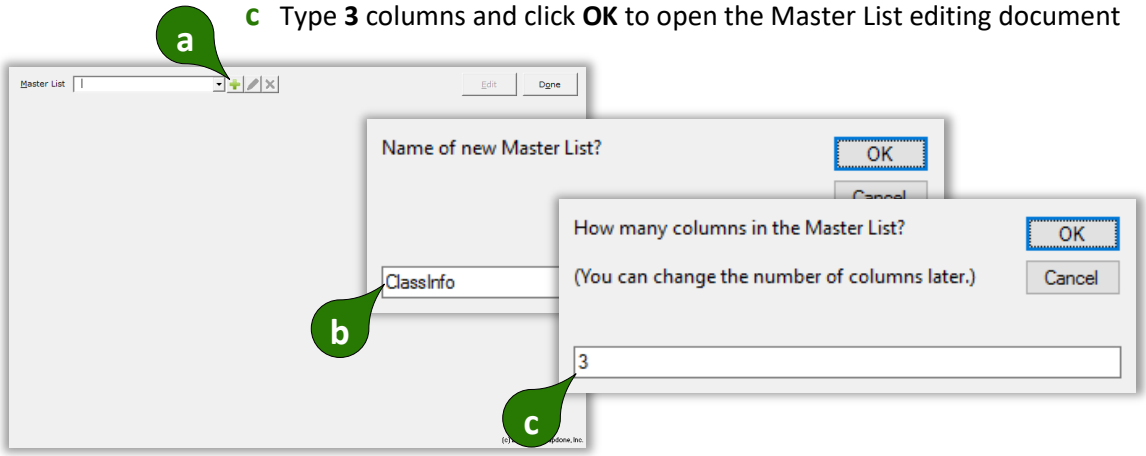
2 Create a Master List

- Click **Sources**, **Master Lists** to open the Master Lists screen

a Click to create a new Master List

b Type the name **ClassInfo** and click **OK**

c Type **3** columns and click **OK** to open the Master List editing document

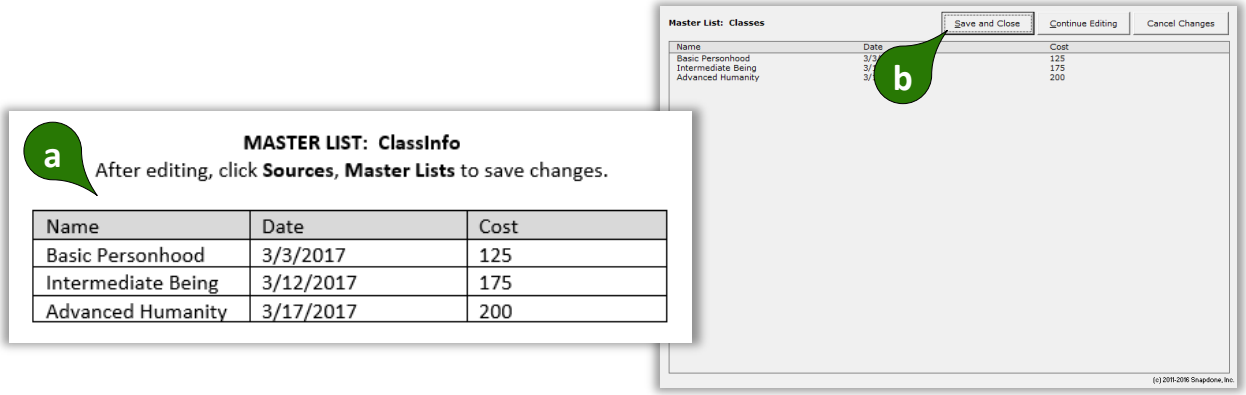


3 Fill in the Master List

a Fill in the Master List as shown (to add a new row, press **Tab** when the cursor is in the last cell)

- Click **Sources**, **Master Lists** to return to the Master Lists screen

b Click **Save and Close**



4 Create a Smart Answer

- **a** Put the cursor in the **Classes** answer box and click **Smart Answer**
- **b** Click the **Dropdown** answer type
- **c** Select **Series of dropdowns**
- **d** Select the source **Master List**, **ClassInfo** and click **OK**

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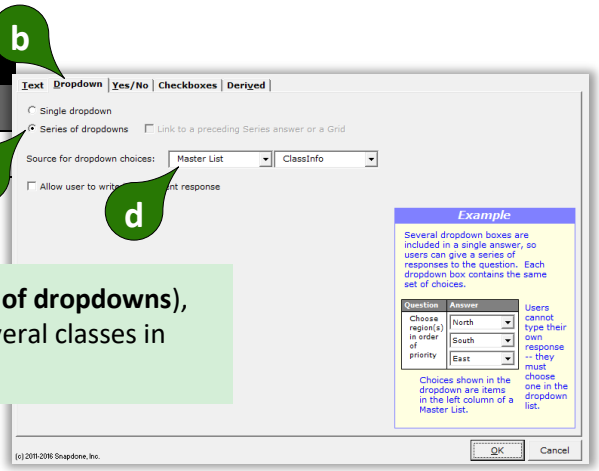
Label	Question	Answer
Classes	List the classes registered	



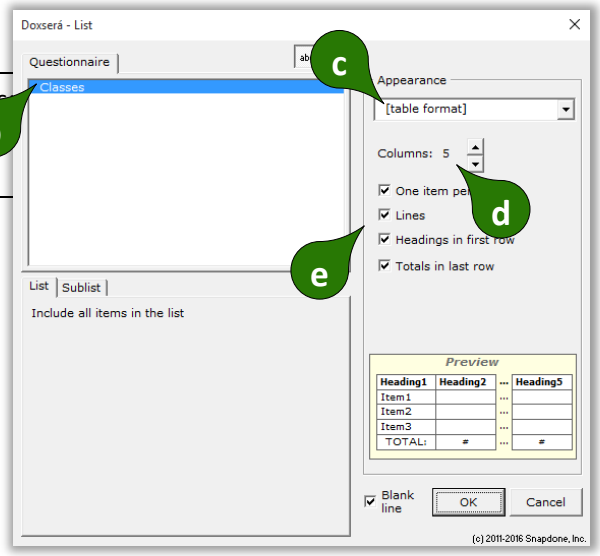
Because this is a series answer (**Series of dropdowns**), the form user will be able to select several classes in response to this one question.

5 Add a List

- **a** Put the cursor between the two paragraphs and click **List**
- **b** Select the **Classes** answer
- **c** Select the **[table format]** appearance
- **d** Select **5** columns
- **e** Checkmark **One item per row**, **Lines**, **Headings in first row**, and **Totals in last row**, then click **OK**

a Thank you for registering for the following classes

Payment is due one week before the class date.



6 Customize the List

a Replace the placeholder headings with **Class**, **Date**, **Tuition**, **Tax**, and **Total**

b Delete the **0** field from columns 2, 3, and 4

Before

Thank you for registering for the following classes:

Heading1	Heading2	Heading3	Heading4	Heading5
{List❶:{Classes:Name❶X}				
|{Classes:Name❶X}				
|{Classes:Name❶X}				
TOTAL:	0	0	0	0

}Payment is due one week before the class date.

After

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
{List❶:{Classes:Name❶X}				
|{Classes:Name❶X}				
|{Classes:Name❶X}				
TOTAL:				0

}Payment is due one week before the class date.

Remember that every List has 3 clauses (page 50). The same is true for Lists that are formatted as tables, with each clause occupying a row:

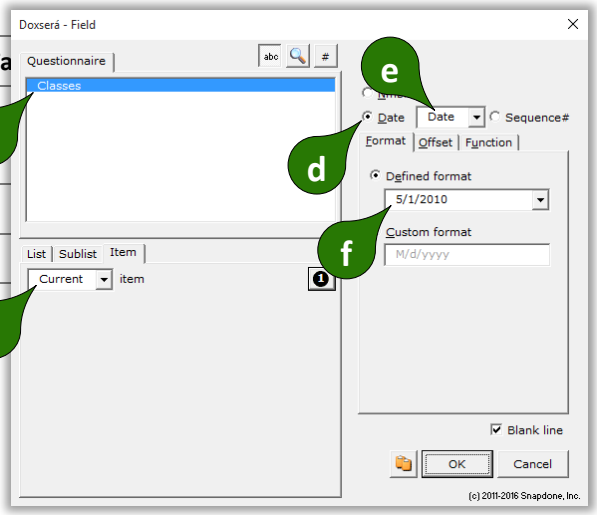
	Class	Date	Tuition	Tax	Total	
First ➡	{List❶:{Classes:Name❶X}					⬅ First
Middle ➡	|{Classes:Name❶X}					⬅ Middle
Last ➡	|{Classes:Name❶X}					⬅ Last
	TOTAL:				0	

When we add info to the first clause, if we want that info to appear for each item in the List, we'll have to add it to the middle clause and last clause too.

7 Add a date Field in the first clause

- **a** Put the cursor in the first cell under the **Date** heading and click **Field**
- **b** Select the **Classes** answer
- **c** Select the **Current** item
- **d** Select the **Date** Field type
- **e** Select the **Date** column of the Master List
- **f** Select the **5/1/2010** format and click **OK**

Class	Date	Tuition	Ta
{List❶:{Classes:Name❶X}			
|{Classes:Name❶X}			
|{Classes:Name❶X}			
TOTAL:			



8 Copy the date Field to the middle and last clauses

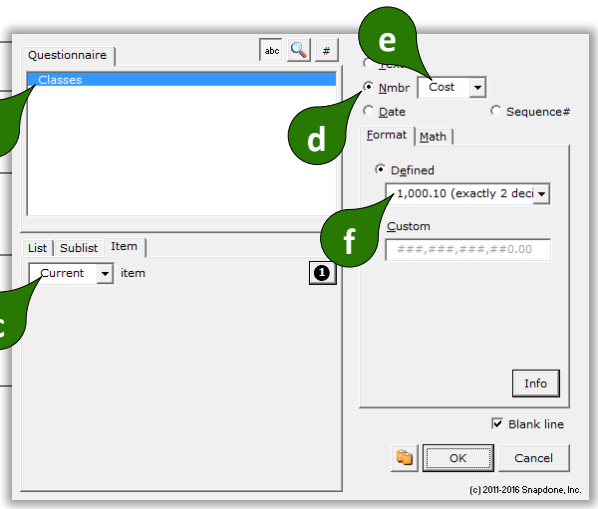
- **a** Select the **{Classes:Date❶X}** Field and copy with **Ctrl+C**
- **b** Use **Ctrl+V** to paste the Field into the middle clause and last clause

Class	ate	Tuition	Tax	Total
{List❶:{Classes:Name❶	{Classes:Date❶X}			
|{Classes:Name❶X}				
|{Classes:Name❶X}				
TOTAL:				0

9 Add a number Field

- **a** Put the cursor in the first cell under the **Tuition** heading and click **Field**
- **b** Select the **Classes** answer
- **c** Select the **Current** item
- **d** Select the **Number** Field type
- **e** Select the **Cost** column of the Master List
- **f** Select the **1,000.10 (exactly 2 decimals)** format and click **OK**
- **g** As in Step **8** above, copy and paste the Field from the first clause to the middle and last clauses

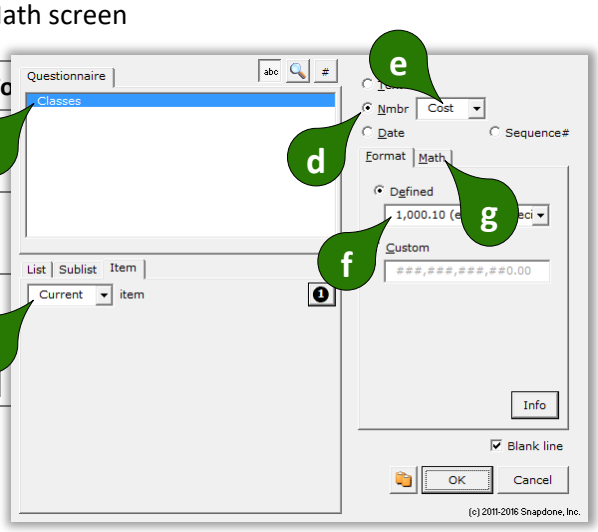
Class	Date	Tuition
{List❶:{Classes:Name❶X}	{Classes: Date❶X}	
|{Classes:Name❶X}	{Classes: Date❶X}	
|{Classes:Name❶X}	{Classes: Date❶X}	
TOTAL:		



10 Add a math Field

- **a** Put the cursor in the first cell under the **Tax** heading and click **Field**
- **b** Select the **Classes** answer
- **c** Select the **Current** item
- **d** Select the **Number** Field type
- **e** Select the **Cost** column of the Master List
- **f** Select the **1,000.10 (exactly 2 decimals)** format
- **g** click **Math** to open the Math screen

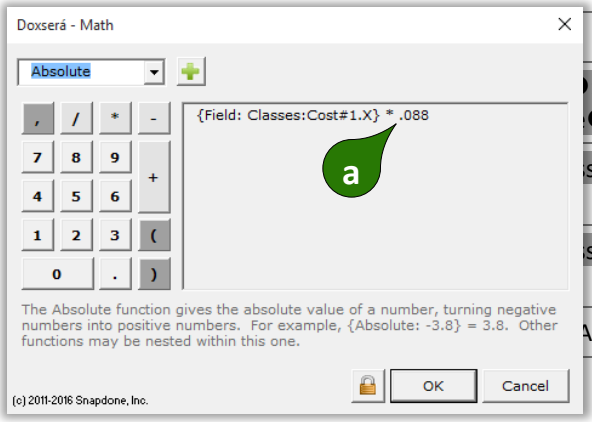
Class	Date	Tuition	Tax	To
{List❶:{Classes: Name❶X}	{Classes: Date❶X}	{Classes: Cost❶X}		
|{Classes:Name❶X}	{Classes: Date❶X}	{Class Cost❶X}		
|{Classes:Name❶X}	{Classes: Date❶X}	{Classes: Cost❶X}		
TOTAL:				0



11 Create a formula

a Put the cursor at the end of the formula and type ***.088**, then click **OK** to close the Math screen and **OK** again to close the Field screen

b As in Step **8** above, copy and paste the **{###}** Field from the first clause to the middle and last clauses



	Date	Tuition	Tax	Total
:{Classes: ❶X}	{Classes: Date❶X}	{Classes: Cost❶X}	{###}	
ses:Name	{Classes: Date❶X}	{Class Cost❶X}		
ses:Name	{Classes: Date❶X}	{Classes: Cost❶X}		
AL:				0

When creating math formulae, you can sometimes get a head start by copy/pasting an existing math Field and then modifying the formula. In the next step, we'll copy a Field that calculates tax, then modify the formula to calculate tax + tuition.

12 Create a second math Field and edit it

a Select the **{###}** Field and copy with **Ctrl+C**

b Put the cursor in the first cell under the **Total** heading and paste with **Ctrl+V**

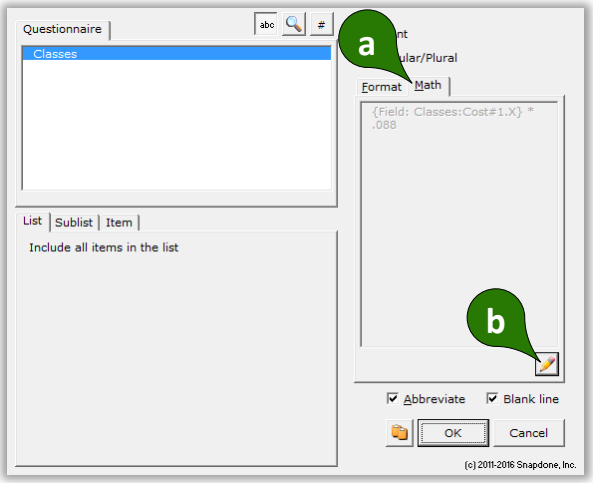
c Put the cursor in the new **{###}** Field and click **Field** to edit it

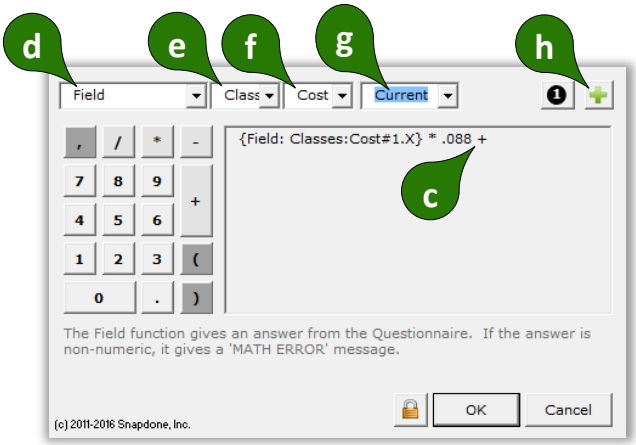
Class	Date	Tuitio	Tax	Total
{List❶:{Classes: Name❶X}	{Classes: Date❶X}	{Classes: Cost❶X}	{###}	
|{Classes:Name ❶X}	{Classes: Date❶X}	{Classes: Cost❶X}		
|{Classes:Name ❶X}	{Classes: Date❶X}	{Classes: Cost❶X}		
TOTAL:				

Class	Date	Tuition	Tax	Total
{List❶:{Classes: Name❶X}	{Classes: Date❶X}	{Classes: Cost❶X}	{###}	{###}
|{Classes:Name ❶X}	{Classes: Date❶X}	{Classes: Cost❶X}	{###}	
|{Classes:Name ❶X}	{Classes: Date❶X}	{Classes: Cost❶X}	{###}	
TOTAL:				0

13 Change the formula in the new math Field

- **a** Click **Math** to see the formula
- **b** Click to open the Math screen
- **c** Type **+** at the end of the previous formula
- **d** Select the **Field** function
- **e** Select the **Classes** answer
- **f** Select the **Cost** column of the Master List
- **g** Select the **Current** item in the List
- **h** Click to add the function to the formula, then click **OK** to close the Math screen and **OK** again to close the Field screen





14 Copy the new math Field to the middle and last clauses

- **a** As in Step **8** above, copy and paste the Field from the first clause to the middle and last clauses

Class	Date	Tuition	Tax	Total
{List❶:{Classes: Name❶X}	{Classes: Date❶X}	{Classes: Cost❶X}	{###}	{###}
|{Classes:Name ❶X}	{Classes: Date❶X}	{Classes: Cost❶X}	{###}	
|{Classes:Name ❶X}	{Classes: Date❶X}	{Classes: Cost❶X}	{###}	
TOTAL:				0

a a a

One more item requires attention. The **0** in the last cell is a standard Word sum Field, so it needs to be formatted with the standard Word procedure: right-click on the Field, choose **Edit Field**, click **Formula**, and choose the number format **$#,##0.00**.

Lesson 17 Lesson 17 Lesson 17

THE PAYOFF

The form user makes a couple quick choices, and additional info is drawn from the ClassInfo Master List and included in the resulting document, along with several math calculations.

Doxserá (c) 2011-2015 Snapdone,		
Label	**Question**	**Answer**
Classes	List the classes registered	Basic Personhood Advanced Humanity

Thank you for registering for the following classes:

Class	Date	Tuition	Tax	Total
Basic Personhood	3/3/2017	125	11.00	136.00
Advanced Humanity	3/17/2017	200	17.60	217.60
TOTAL:				$353.60

Payment is due one week before the class date.

Lesson 17 Lesson 17 Lesson 17

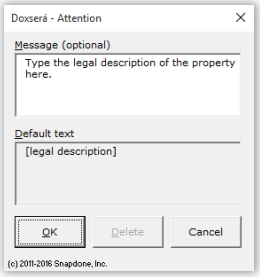
Attention Markers

Authors

Occasionally you will want to draw the form user's attention to a particular portion of the form – perhaps a lengthy section needs to be drafted from scratch.

Select the location in the document, click **Attn Mark**, and type a message if desired.

When the form is used, the cursor jumps to the marked location and your message (if any) is presented. If you have marked several spots for attention, the form user clicks **Attn** to visit each of them.



Using Smarter Forms

Answering Questions in the Questionnaire

Users

Tabbing Is the Best!

When answering questions in the Questionnaire, press **Tab** to move from one answer to the next (**Shift+Tab** to move backwards). It's quicker than reaching for the mouse (quicker even than reaching for the arrow keys on your keyboard). And it has an additional enormous advantage when the Questionnaire contains Smart Answers: it moves your cursor exactly where needed to respond to the next question, skipping over any extraneous text and preselecting the entire answer for easy type-over replacement. Just tab 'n type!

Series Answers

Several buttons on the **Dox**/**DB**/**AwD** tab make it easy to work with series answers (including Grids).

If the series answer doesn't contain enough empty boxes to hold your answer, click **Add** to create more. (When working in one of these answers, a flag appears above the cursor, reminding you to **click Add button to add a row**.)

Click **Remove** to remove an item from the series answer (or a whole row from a Grid).

Click **Up** or **Down** to rearrange items in the series answer.

Refresh Dropdowns and Checkboxes

Linked answers (page 8) draw their choices from previous answers. To update them with current choices, click **Refresh**. (When working in one of these answers, a flag appears above the cursor, reminding you to **click Refresh to update choices**.)

Fetch Answers

Some answers draw their choices from Data Sources (page 159) or Folios (page 124). When the cursor is in one of these answers, a flag appears above the cursor, reminding you to **click Fetch to choose**. Don't type a response in this answer box – instead, click **Fetch** and select an answer from the Fetch screen.

Peeking

While typing answers, you may want to peek at the location(s) in the form where your answer will be used. Click **Peek Next** to turn on a split-screen view showing where the current answer is used in the form. Click **Peek Next** again to advance to the next spot where the same answer is used, or click **Peek Off** when you're finished with the split-screen view.

Filling in the Form

Users

Start

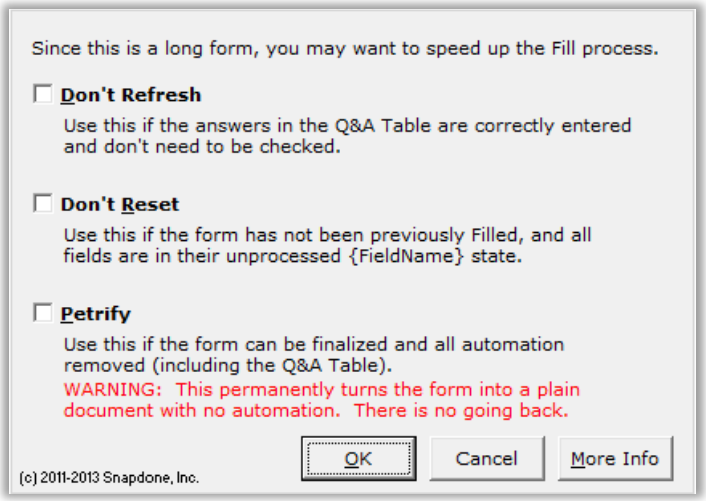
After opening a form, click **Start** to move the cursor to the top of the Questionnaire, ready to start answering questions. This also updates any Smart Answers that use Master Lists (page 119) as their source. If the form is especially large and complicated and you don't want to wait, you can bypass the updating step by holding down **Shift** while clicking **Start**.

Fill

After typing answers in the Questionnaire, click **Fill** to move all of the answers up into the form, automatically formatting Fields properly, changing pronouns and singular/plural words, calculating date offsets and math, and including or excluding conditional text as appropriate.

After filling in the form, you may save it in its "filled" state indefinitely. At some later date, if a misspelling is discovered or other info changes, simply make the revision in the Questionnaire then click **Fill** again to update the entire form.

If your form is exceptionally large (over 1,000 Fields, Lists, and Conditions), you qualify for Speedy Fill mode. After clicking **Fill**, this screen appears, with three options:



Don't Refresh: This skips the Refresh step that ordinarily occurs at the beginning of the Fill process. That step attempts to fix any problems with answers in the Questionnaire. If you're comfortable that answers are entered correctly, then it's safe to use this option. If the Questionnaire contains a bajillion answers, this will save some time.

Don't Reset: This skips the Reset step that ordinarily occurs next in the Fill process. That step restores all Fields, Lists and Conditions to their original, pristine state, which is important if the form has been previously filled with **Fill** or **Blanks** (page 115). Use this option if you're certain the form has not already been filled in. If the form contains a ton of Fields, this will save some time.

Petrify: When this option is selected, the form is both Filled and Petrified, just as if you clicked **Petrify** (page 115) immediately after **Fill**. If the form contains a great big buncha Conditions, this will save a *lot* of time. But remember: This step is irreversible. All automation (including the Questionnaire) is removed from the form, so you cannot go back and change your answers later.

Attention Markers

If a form contains an Attention Marker, it will automatically be selected when you click **Fill**, and its message (if any) displayed. To move on to other Attention Markers in the same form, click **Attn**.

Reset

After filling in a form with **Fill**, you may want to return to the original unfilled view. Click **Reset** to return the form to its original state, without disturbing the contents of the Questionnaire.

This is especially important for form authors when testing a form. After clicking **Fill** to test a form, always **Reset** before making changes to the form; otherwise your changes might be lost.

Blanks

Click **Blanks** to replace Fields with blank lines. This is handy if you want to print out a copy of the form so that it can be filled in by hand. Some form authors save their finished forms with **Blanks** turned on because it makes the form look less complex and more welcoming to form users.

Petrify

After finalizing a document, you may click **Petrify** to convert all Fields to plain text and remove the Questionnaire. The document is then an ordinary Word document stripped of **Dox**/**DB**/**AwD** features, ready for emailing to a client or any other purpose. You may also choose to automatically scrub metadata from the finished document during **Petrify** (page 199).

Capturing and Reusing Data (Save/Load)

Users

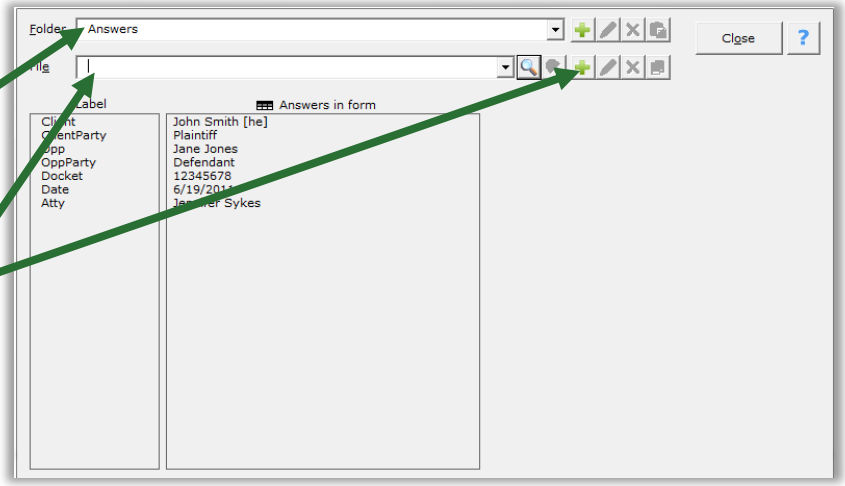
Many forms might be used in a single matter, and lots of info is repeated among those forms – the client's name, address, phone number, and so on. Rather than retype all that info in each form, you can save answers from one form and reuse those answers in later forms.

Saving Answers

After typing answers in a Questionnaire, click **Save/Load**.

Choose where the answer file will be saved in the **Folder** box. (See page 118 for more on creating, renaming, and deleting folders.)

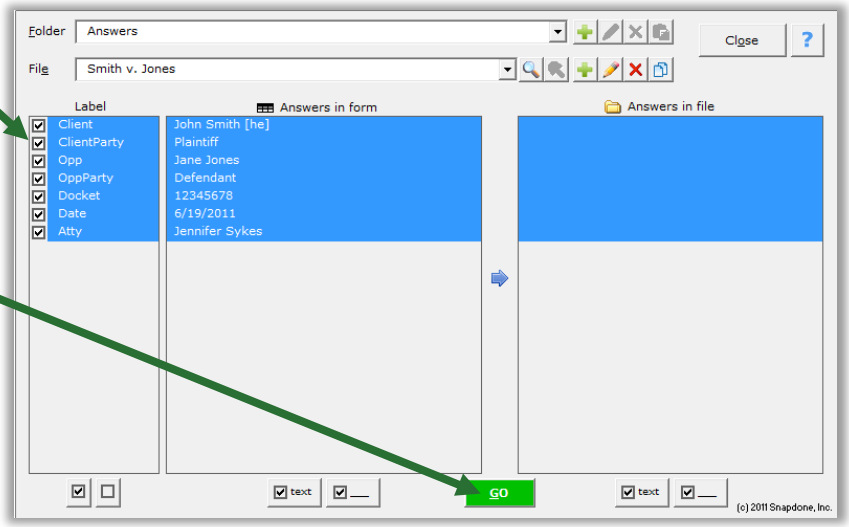
If an answer file has already been created for this matter, select it in the **File** box. If not, Click to create a new file.



After selecting (or creating) an answer file for this matter, click to indicate answers should be copied *from the form to the file.*

Checkboxes show which answers will be copied to the file and give you a chance to refine the selection if needed.

Click **GO** to finish.



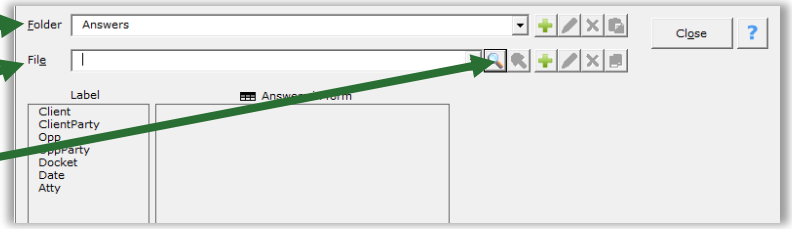
Loading Answers

Now suppose that you are using a second form for the same matter. Instead of retyping answers into the second form's Questionnaire, simply load the answers you saved previously.

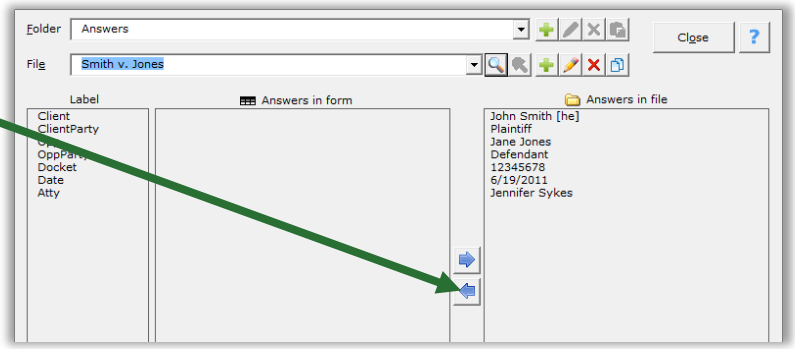
Click **Save/Load** and select the **Folder** where the answer file is saved.

Select an answer file in the **File** box.

If there are lots of answer files, use the search button for fast results.

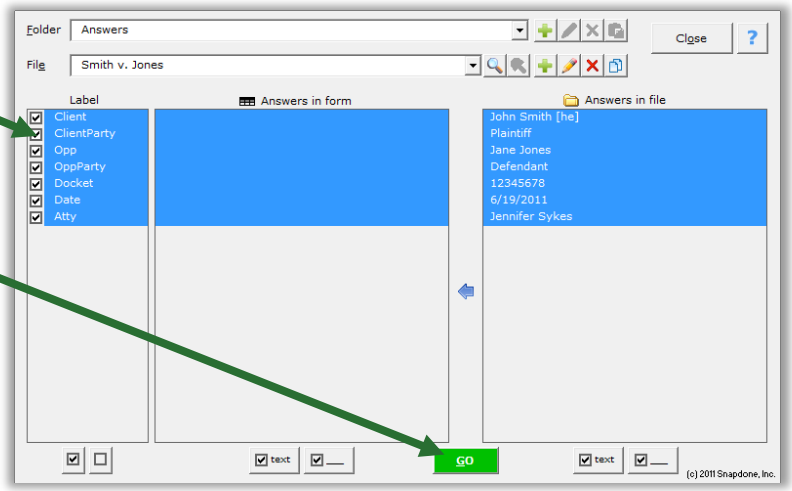


After selecting an answer file, click to indicate answers should be copied *from the file to the form.*



Checkboxes show which answers will be copied to the form.

Click **GO** to finish.



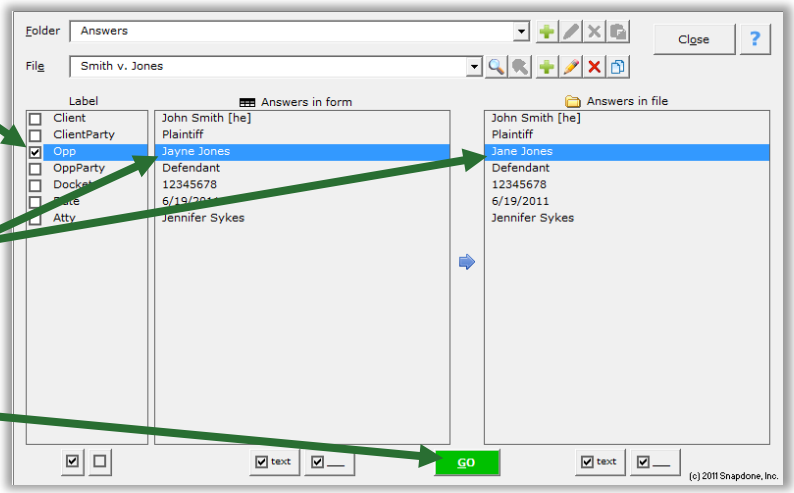
Updating Answers

You will frequently want to update the answers in an answer file. Perhaps you corrected a name spelling, or maybe a new form asked questions that did not appear in earlier forms. With the current form on your screen (and accurate answers in the form's Questionnaire), click **Save/Load**, select the answer file, and click to indicate answers should be copied *from the form to the file.*

Answers that differ between the form and the saved file are automatically selected.

In this example, the opposing party's name was spelled **Jane Jones** in the saved file, but it has been corrected to **Jayne Jones** in the form.

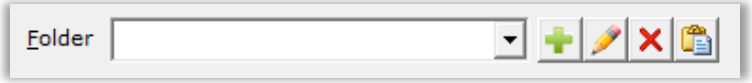
Click **GO** to finish, and the file is updated with the new name spelling.



Organizing Answer Files

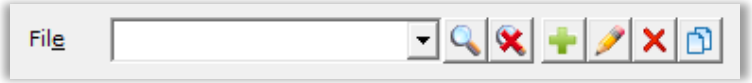
When first installed, **Dox**/**DB**/**AwD** stores all answer files in a single folder named "Answers." But you may want to subdivide that folder into several subfolders or even sub-subfolders.

Use the **Folder** buttons at the top of the **Save/Load** screen to organize the area where answers are saved in your office.



Click to create a subfolder within the selected folder, to rename a subfolder, or to remove a subfolder. Use to paste an answer file into the selected folder after copying it from another folder.

Use the **File** buttons at the top of the **Save/Load** screen to manage answer files.



Click to find a file in the currently selected folder or its subfolders, and to return to a listing of all files. Click to create a new answer file within the selected folder, to rename an answer file, or to permanently remove an answer file and all the answers it contains.

To use one answer file as a starting point for another (for instance, if two matters are related and share much of the same info), click to copy the first file, select the folder where the new file belongs, then click to paste it.

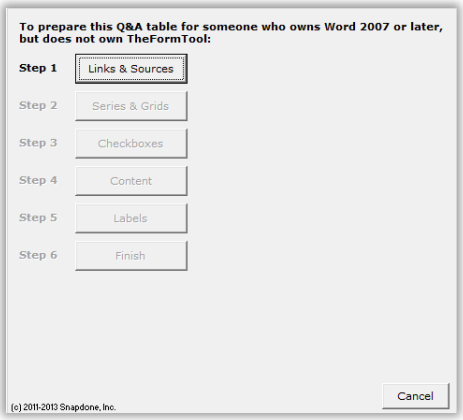
Sharing the Questionnaire

Rather than fill in the Questionnaire yourself, you can use it to collect answers from someone else, even if that person does not own **Dox**/**DB**/**AwD** or The**Form**Tool. All they need is Microsoft Word, version 2007 or later.

1. Prepare and Send the Questionnaire

First open a form as if you were going to fill it in yourself, then click **Tools**, **Prepare to Share**.

This screen walks you through several steps to make the Questionnaire usable by anyone who owns Microsoft Word, version 2007 or later. Depending on your choices, it will:



Step 1 Check linked answers and sourced answers (answers that use other answers as a source for choices). You are prompted to convert linked answers to Grids, while sourced answers are automatically made sharable.

Step 2 Adjust series answers to include enough empty slots for complete answers.

Step 3 Convert checkboxes to be compatible with Word 2007.

Step 4 Remove the content of the form so the Questionnaire can be shared by itself.

Step 5 Hide the Label column of the Questionnaire.

When finished, send the prepared Questionnaire to your target audience, asking them to return it to you after answering all the questions.

2. Save Answers

When the Questionnaire is returned to you, open it and click **Save/Load** to save the responses to an answer file (page 116). Then close the Questionnaire – it's not needed for Step 3.

3. Fill in the Form

Use the original form to start a fresh document, and click **Save/Load** to load the responses you saved in Step 2. Click **Fill**, and the form is complete.

Sources: Master Lists

Master Lists are great repositories for tabular info (arranged in columns and rows) that is used in multiple forms. For example, many firms maintain a Master List of employees, along with their direct dial numbers, email addresses, and other info. That info is then available in all forms to create signature blocks and personalized letterhead. Rather than require the form user to type a name, create a Dropdown answer that uses a Master List as its source (page 11). Not only have you saved the form user the trouble of typing the name; they also don't have to type (or even remember) the email address and phone number. And when a new employee joins the firm, type the new name, direct dial number, and email address in a single location – the Master List – and all of the forms using that Master List are updated with the new info.

Lesson 18: Creating Master Lists

In this lesson, you create a Master List named "Employees" to store employee names, direct dial numbers, and email addresses.

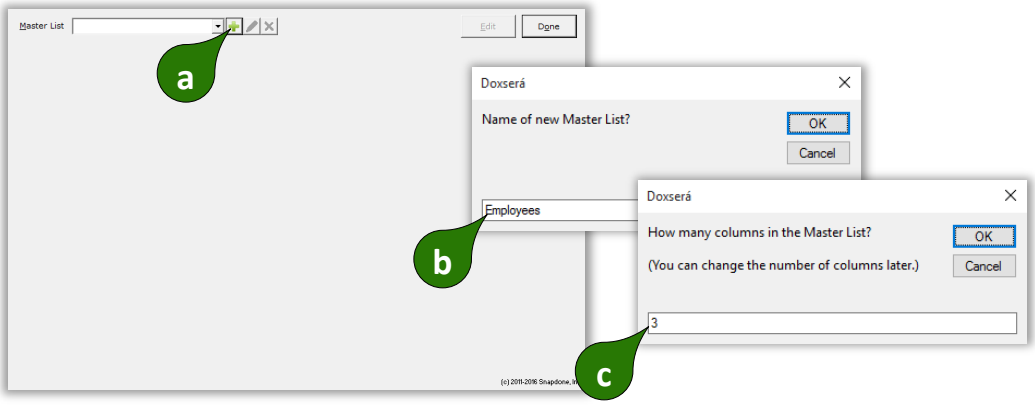
1 Add a new Master List

- Click **Sources**, **Master Lists** to open the Master Lists screen

a Click to create a new Master List

b Name the Master List **Employees** and click **OK**

c Choose **3** columns and click **OK** to open the Master List editing document



2 Add content to the Master List

a Type column headings in the first row: **Name**, **Ext**, **Email**

b Fill in as many rows as you like (to add a new row, press **Tab** when the cursor is in the last cell)

a

MASTER LIST: Employees

After editing, click **Sources**, **Master Lists** to save

Name	Ext	Email
Jennifer Sykes	8934	sykes@lawfi
Herb Blount	9478	blount@law
Ethel Adams	8234	adams@law

b

This is an ordinary Word table, so you can use all of Word's built-in table editing commands to add, delete, and move rows and columns. A summary of handy keystrokes is included in the footer of the Master List editing document.

3 Save your work

- Click **Sources**, **Master Lists** to return to the Master Lists screen

a Click **Save and Close**

This Master List will be used in Lesson 19 on page 122.

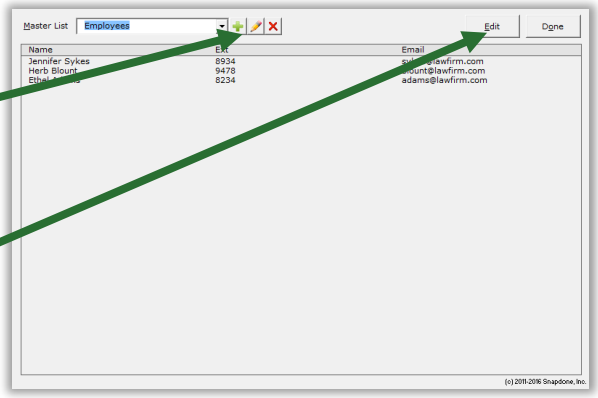
Modifying Master Lists

Authors

Click **Sources**, **Master Lists** at any time to return to the Master List screen and manage your Master Lists.

After selecting a Master List, click to rename , or ✕ to permanently remove the whole Master List and all the data it contains.

Click **Edit** to open the Master List editing document so you can make changes or additions.



Import and Export Master Lists

Authors

When **Dox**/**DB**/**AwD** is installed on a network, Master Lists are shared among all users. But you may wish to download and install sample Master Lists or share Master Lists with **Dox**/**DB**/**AwD** users at other offices.

To import a Master List: Open the Master List document that you downloaded or received, click **Sources**, **Master Lists** to open the Master Lists screen, and click **Save and Close**. **WARNING:** If you already have a Master List with the same name as the Master List being imported, it will be overwritten with the imported Master List.

To export a Master List: Click **Sources**, **Master Lists** to open the Master Lists screen, select a Master List, and click **Edit**. Save the resulting Word document and send it to the recipient.

Lesson 19 Lesson 19 Lesson 19

Lesson 19: Using Master Lists

- Master List (page 119)
- Dropdown answer (page 9)

Use your Master List of Employees to create an automated signature block.

Prerequisites:

- "Employees" Master list from Lesson 18 on page 120

1 Create the Questionnaire

a Type or copy/paste this text into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

I swear that the above-stated facts are true and correct.

a

Jennifer Sykes
(555) 555-8934
sykes@lawfirm.com

b

Doxserá (c) 2011-2016 Snapdone, Inc.

Label	Question	Answer
Signer	Who will sign this document?	

2 Create a Smart Answer

a Put the cursor in the **Signer** answer box and click **Smart Answer**

b Click the **Dropdown** answer type

c Select the source **Master List**, **Employees** and click **OK**

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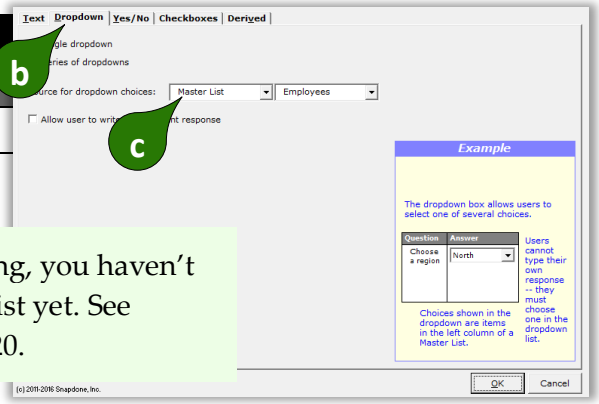
Label	Question	Answer
Signer	Who will sign this document?	

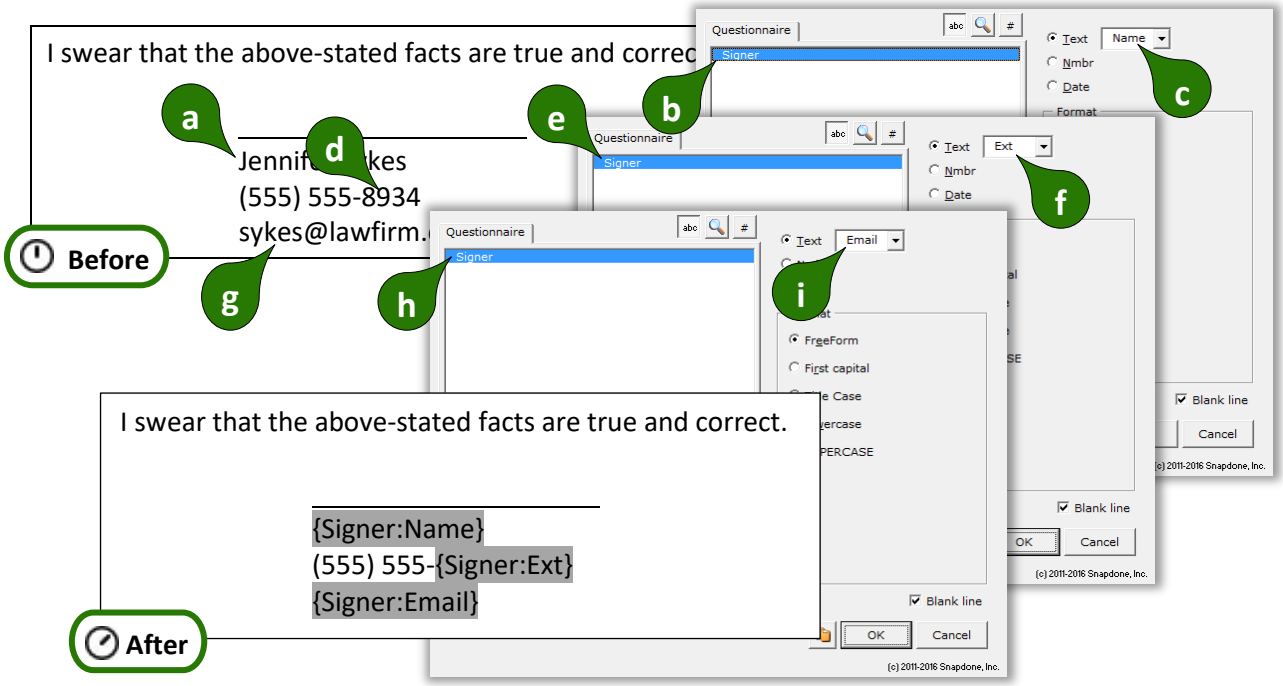
a



If **Employees** is missing, you haven't created the Master List yet. See Lesson 18 on page 120.

3 Add Fields

- **a** Select **Jennifer Sykes** and click **Field**
- **b** Select the **Signer** answer
- **c** Select the **Name** column of the Master List and click **OK**
- **d** Select **8934** and click **Field**
- **e** Select the **Signer** answer
- **f** Select the **Ext** column of the Master List and click **OK**
- **g** Select **sykes@lawfirm.com** and click **Field**
- **h** Select the **Signer** answer
- **i** Select the **Email** column of the Master List and click **OK**



THE PAYOFF

All that's required of the form user is to select an employee from a dropdown box in the Questionnaire. When **Fill** is clicked, the name, extension, and email address are all filled in automatically.

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Label	Question	Answer
Signer	Who will sign this document?	Herb Blount

I swear that the above-stated facts are true and correct.

Herb Blount
(555) 555-9478
blount@lawfirm.com

Sources: Folios

Folios store multiple texts, called *Passages*, that can be brought into documents manually with **Fetch** or into forms automatically with **Fetcher**.

A Folio could contain boilerplate paragraphs or pages, employee biographies, parts lists, jury instructions, interrogatories, letterheads, captions, or any set of text passages, even if they include graphics, formatting, footnotes, hyperlinks, special characters, and other non-text features.

Consider using Folios if:

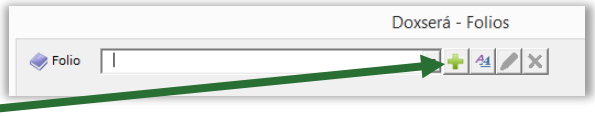
- You use standardized blocks of text in multiple forms.
- You want to create a library of info that can be searched and selected for insertion at any point in any document.
- You want to create forms that intelligently select and insert blocks of external text. Decisions made by the form can be based on responses to questions in the Questionnaire combined with internal logic.

Creating Folios

Authors

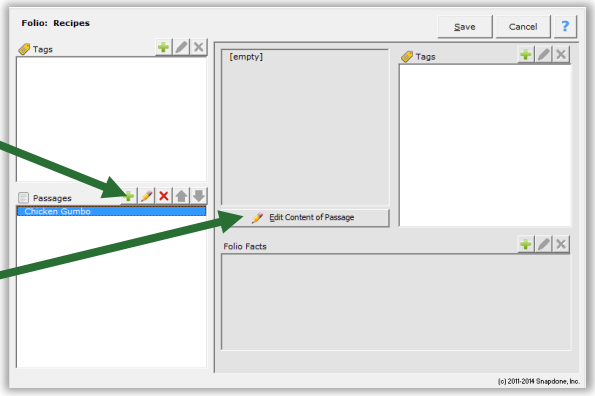
Basic Folios

To create a Folio, first click **Sources**, **Folios** to open the Folios screen.



Click to add a new Folio. You will be asked to name the Folio and the first Passage. (For example, a Folio of recipes might be named **Recipes**, and the first Passage might be named **Chicken Gumbo**.)

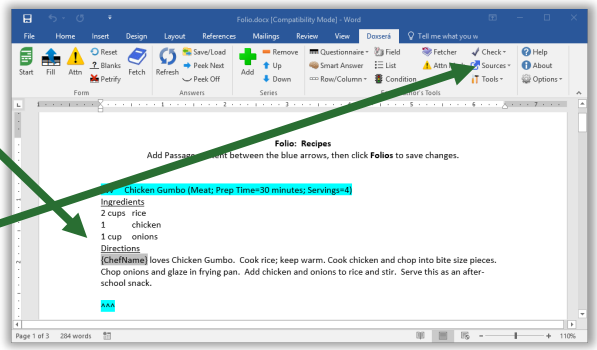
Click to add additional Passages.



To add text to a Passage, select it and click **Edit Content of Passage** to open a Folio document.

The content of each Passage is typed (or copied and pasted) between the blue vvv and ^^^ markers.

When finished, click **Sources**, **Folios** to return to the Folios screen, then click **Save** to save your changes.



Lesson 20: Creating Folios

In this lesson, you are a keeper of recipes, and you have decided to store them in a Folio for easy access.

1 Create a Folio and its first Passage

- Click **Sources**, **Folios**

a Click to add a new Folio

b Type the Folio name **Recipes** and click **OK**

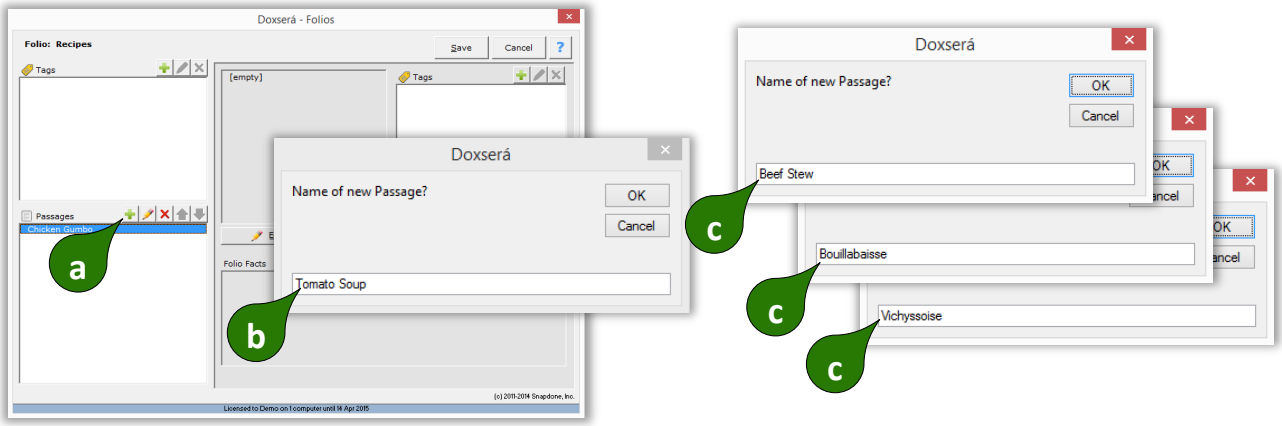
c Type the first Passage name **Chicken Gumbo** and click **OK**

2 Add more Passages

a Click to add a new Passage

b Type the Passage name **Tomato Soup** and click **OK**

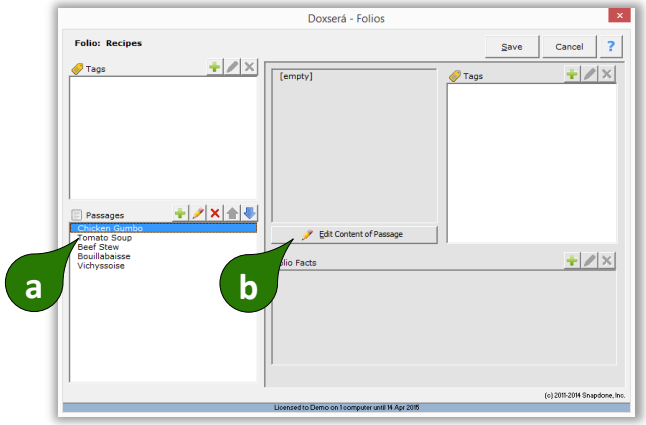
c Repeat **a** and **b** to create three more Passages: **Beef Stew**, **Bouillabaisse**, and **Vichyssoise**



3 **Open the Folio document**

a Select any Passage

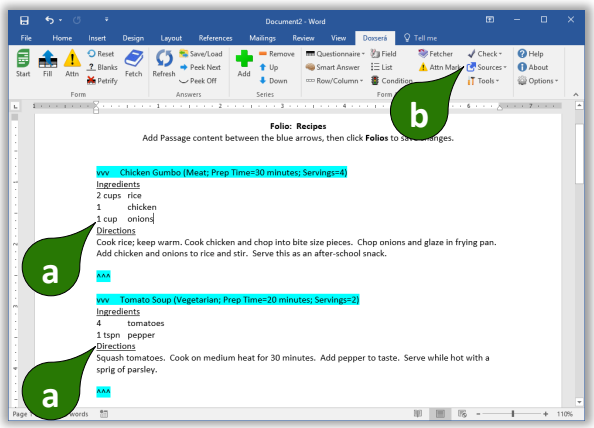
b Click **Edit Content of Passage**



4 **Edit content of Passages**

a Between the blue arrows, type or paste a recipe for each dish

b Click **Sources**, **Folios** to return to the Folios screen, and click **Save** to save your work



This Folio will be used in Lesson 21 on page 127.

Folio and Tags

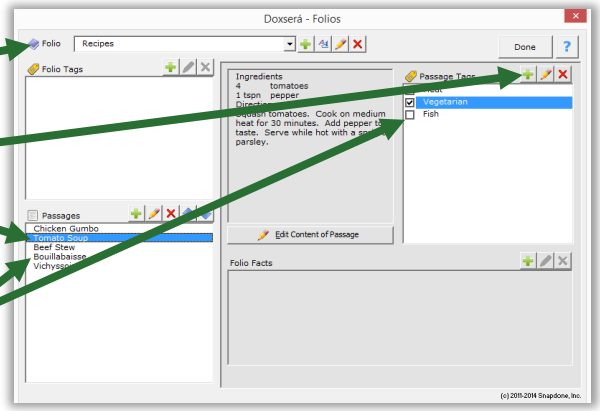
Tags are most commonly used to earmark Passages in a Folio. They make it easier to find Passages, and are also used when creating forms that automatically insert tagged Passages.

To tag Passages in a Folio, click **Sources**, **Folios** to open the Folios screen.

Select a Folio and any Passage.

Click to add a new Passage Tag.

To tag a particular Passage with a particular Tag, select the Passage and checkmark the Tag. Note that a single Passage may be tagged with multiple Tags.



After making changes to a Folio, **Save** and **Cancel** buttons appear. Be sure to **Save** your changes.

Lesson 21 Lesson 21 Lesson 21

Lesson 21: Passage Tags in Folios

- Folio (page 124)
- Passage Tag (page 126)

Tags are used to earmark Passages in a Folio.

Prerequisites:

- "Recipes" Folio from Lesson 20 on page 125

1 Add Passage Tags

- Click **Sources**, **Folios** to open the Folios screen

a Select the **Recipes** Folio

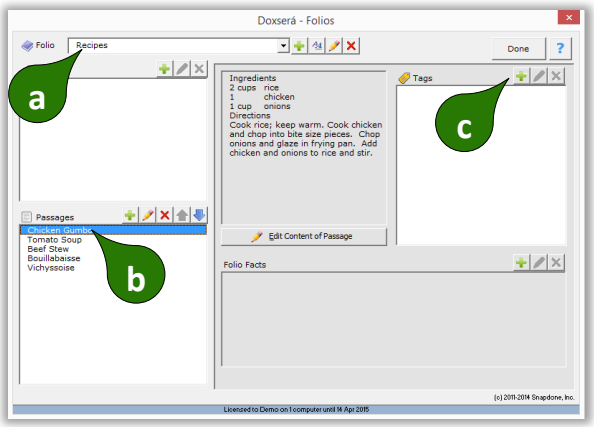
b Select any Passage

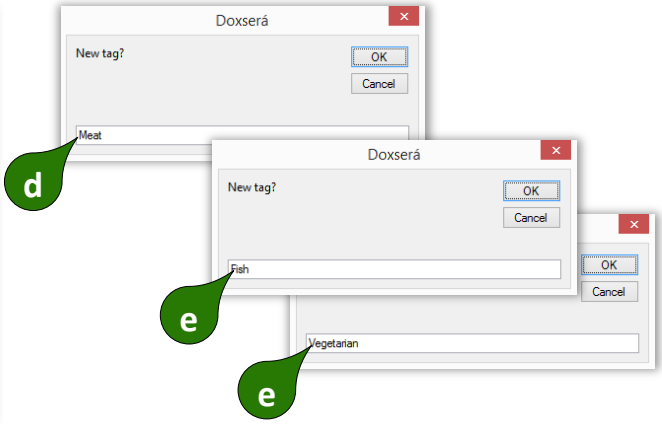
c Click to add a new Tag

d Type the Tag name **Meat** and click **OK**

e Repeat **c** and **d** to create Tags named **Fish** and **Vegetarian**

- Don't close this screen yet — more to come in the next step



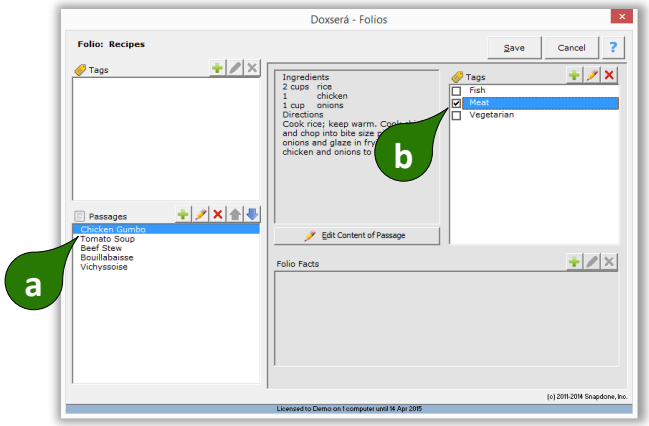


2 Tag each Passage

a Select the **Chicken Gumbo** Passage

b Checkmark the **Meat** Tag

- Repeat **a** and **b** to tag the remaining recipes: **Tomato Soup** is **Vegetarian**; **Beef Stew** is **Meat**; **Bouillabaisse** is **Fish**; and **Vichyssoise** is **Meat**
- Click **Save** to save your work



This Folio will be used in Lesson 22 on page 129.

Folio Facts

Folio Facts add supplemental info to Passages. They are useful when, in addition to inserting a Passage into a form, form authors also need to insert info about that Passage. For example:

- A form that inserts biographies from a Folio could also include a separate listing of each person's name and profession.
- The same Passages and Facts might be arranged differently in two forms. For example, a catalog might show a product's name in a large font above its description. But the same product could appear in a two-column invoice with the name on the left and description on the right.

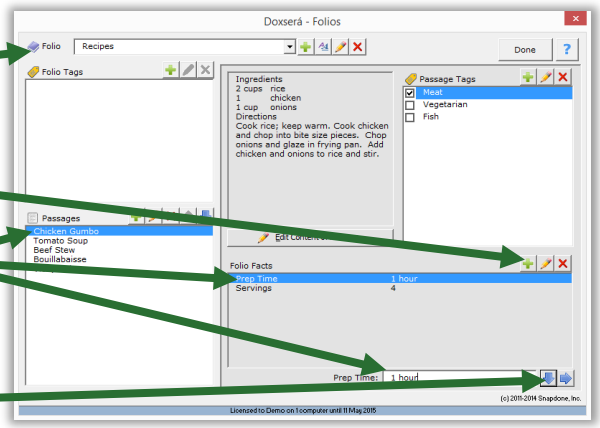
To add Facts to a Folio, click **Sources**, **Folios** to open the Folios screen.

Select the Folio.

Click to add a new Fact label for the whole Folio.

To fill in a Fact for a particular Passage: (1) select the Passage, (2) select the Fact label, and (3) type the Fact.

When typing Facts, click (or press **Enter**) to advance to the next Fact; click (or press **Alt+N**) to advance to the next Passage.



After making changes to a Folio, **Save** and **Cancel** buttons appear. Be sure to **Save** your changes.

Lesson 22: Folio Facts

- Folio (page 124)
- Folio Fact (page 128)

In this lesson, you will add supplemental info to each dish in the "Recipes" Folio.

Prerequisites:

- "Recipes" Folio from Lesson 21 on page 127

1 Add a Fact label

- Click **Sources**, **Folios** to open the Folios screen

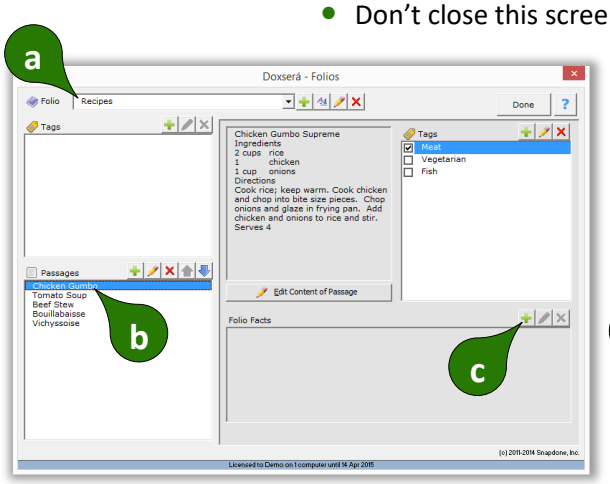
a Select the **Recipes** Folio

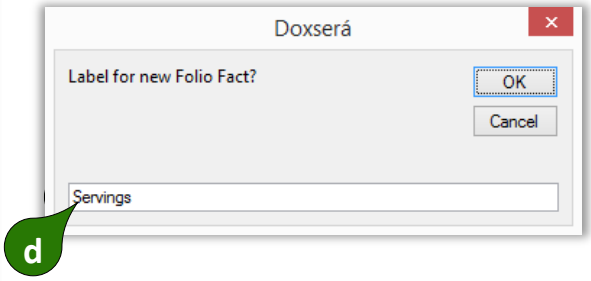
b Select any Passage

c Click to add a new Fact

d Type the Fact label **Servings** and click **OK**

- Don't close this screen yet — more to come in the next step





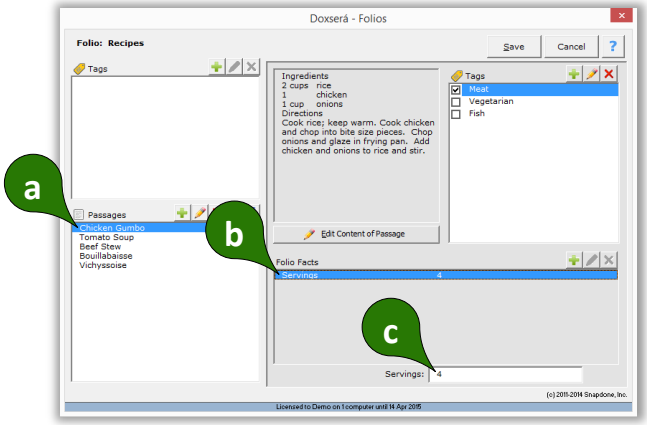
2 Enter Facts

a Select the **Chicken Gumbo** Passage

b Select the **Servings** Fact

c Type **4** in the Servings box

- Repeat **a** thru **c** for the remaining Passages: **Tomato Soup** serves **3**; **Beef Stew** serves **4**; **Bouillabaisse** serves **4**; and **Vichyssoise** serves **2**
- Click **Save** to save your work



This Folio will be used in Lesson 23 on page 130.

Advanced Folio Editing

Once you understand the format of the Folio document, you may find it quicker to make extensive revisions there rather than through the Folios screen.

First open a Folio document: click **Sources**, **Folios**, select a Folio, select any Passage, and click **Edit Content of Passage**.

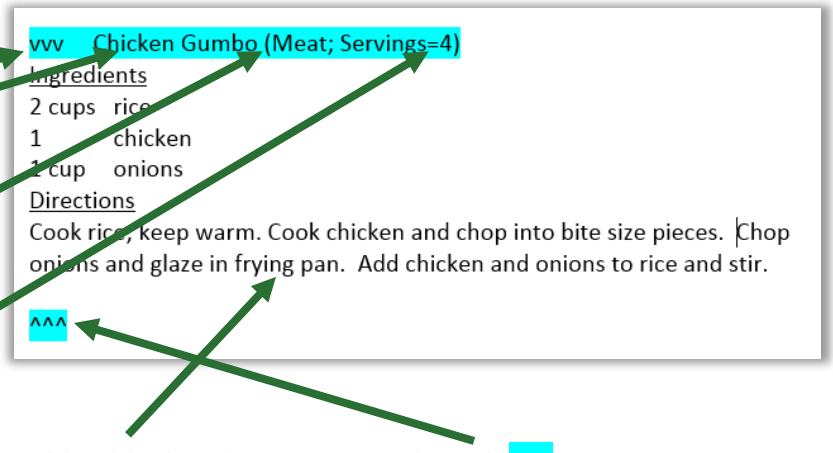
Each Passage in a Folio follows this format:

The Passage begins with **vvv**.

The Passage name.

Parentheses enclose a list of Tags and Facts separated by semicolons.

Facts are distinguished from Tags with an **"="** symbol. For example, **Meat** is a Tag, and **Servings=4** is a Fact.



The Passage contents appear between the two blue blocks. The Passage ends with **^^^**.

Following these rules, you can rename Passages; edit Passage contents; add, rename, and delete Tags; add, relabel, and delete Facts; and change Fact info – all directly within the Folio document.

After making revisions, click **Sources**, **Folios** to return to the Folios screen, then **Save** your changes.

Lesson 23 Lesson 23 Lesson 23

Lesson 23: Advanced Folio Editing

- Folio (page 124)
- Passage Tag (page 126)
- Folio Fact (page 128)

In this lesson you will use advanced methods to expand the "Recipes" Folio.

Prerequisites:

- "Recipes" Folio from Lesson 22 on page 129

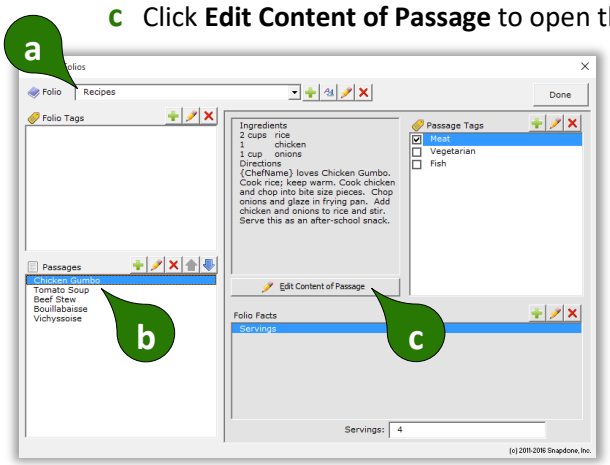
1 Open the Folio document

- Click **Sources**, **Folios** to open the Folios screen

a Select the **Recipes** Folio

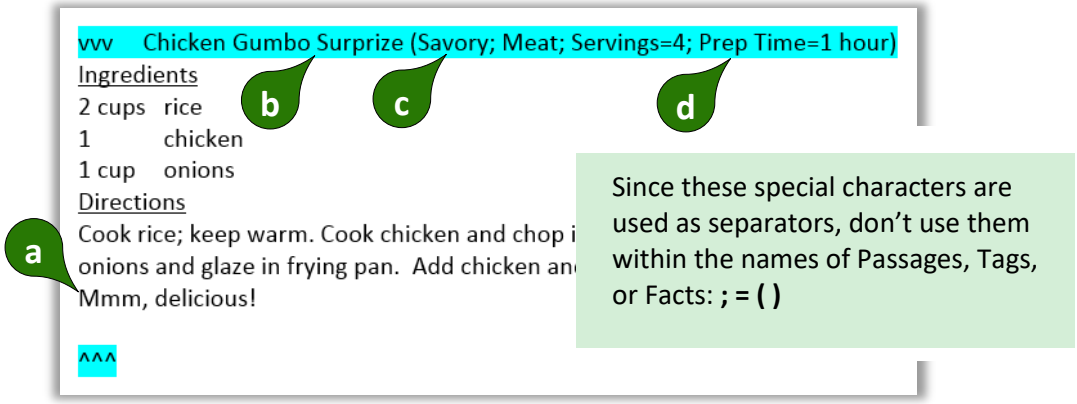
b Select any Passage

c Click **Edit Content of Passage** to open the Folio document



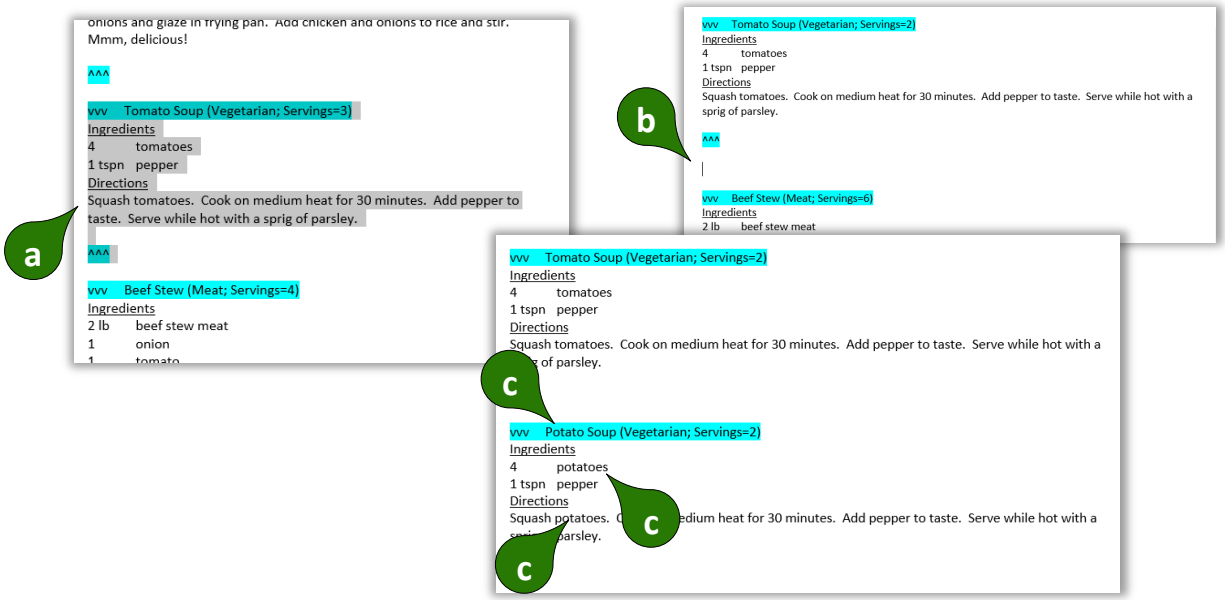
2 Edit all aspects of a Passage

- **a** Edit the *content* of the Passage by typing **Mmm, delicious!** at the end
- **b** Edit the *name* of the Passage by changing **Chicken Gumbo** to **Chicken Gumbo Surprize**
- **c** Add a *Tag* by typing **Savory;** (including the semicolon) before **Meat**
- **d** Add a *Fact* by typing **; Prep Time=1 hour** (including the semicolon) after **Servings=4**



3 Create a new Passage with copy/paste

- **a** Select the entire **Tomato Soup** Passage, making sure to include **vvv** at the beginning and **^^^** at the end, and copy with **Ctrl+C**
- **b** Add a blank line between the **Tomato Soup** and **Beef Stew** Passages, and use **Ctrl+V** to paste the copied Passage
- **c** Revise the copied recipe so it refers to potatoes instead of tomatoes
- Click **Sources**, **Folios** to return to the Folios screen, and **Save** to save your work



This Folio will be used in Lesson 24 on page 133.

Import and Export Folios

When **Dox**/**DB**/**AwD** is installed on a network, Folios are shared among all users. But you may wish to download and install sample Folios or share Folios with **Dox**/**DB**/**AwD** users at other offices.

To import a Folio: Open the Folio document that you downloaded or received, click **Sources**, **Folios** to open the Folios screen, and click **Save**. **WARNING:** If you already have a Folio with the same name as the Folio being imported, it will be overwritten with the imported Folio.

To export a Folio: Click **Sources**, **Folios** to open the Folios screen, select a Folio, select any Passage, and click **Edit Content of Passage**. Save the resulting Word document and send it to the recipient.

Creating Forms that Use Folios

Authors

Form authors have full access to Folios, Passages, and Tags to further automate their form library and add even more flexibility. Possibilities include:

- A form for jury instructions, where the user selects which instructions should be included from a full list of jury instructions.
- A lease agreement composed of clauses selected from a Folio of boilerplate paragraphs.
- An invoice form where parts are chosen from a Folio containing the entire inventory.

The usual approach is to (1) create a Fetch answer that asks the form user to select Folios, Passages, or Tags; then (2) add Fetchers to the form that use those responses to find and fetch particular Passages at particular locations in the finished document.

Fetch Answers

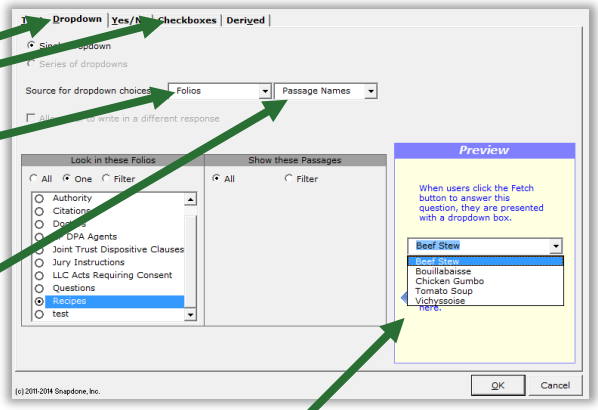
Fetch answers prompt the form user to click **Fetch** to answer a question by selecting from a prescribed list of Folios, Passages, Folio Tags, or Passage Tags.

To create a Fetch answer, put the cursor in an answer box and click **Smart Answer** to open the Smart Answer screen.

Select the **Dropdown** or **Checkboxes** answer type.

Select the **Folios** source.

You will most frequently ask the form user to choose **Passage Names** ("Which of these articles?"), but you may also ask for **Folio Names** ("Which collection of articles?"), **Folio Tags** ("Which type of collection of articles?"), or **Passage Tags** ("Which type of articles?").



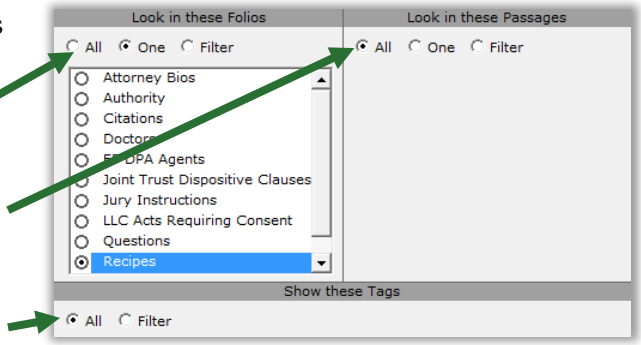
The Preview shows choices that would be presented to a form user *right now.* When the form is used in the future, the choices will reflect the then-current state of the source Folio(s), which might change in the meantime.

The panel in the bottom left corner controls which choices will be shown to the form user.

Select which Folios will be shown: **All**, **One**, or **Filter** by Folio name or Folio Tags.

Select which Passages are shown: **All**, or **Filter** by Passage name or Passage Tags.

If asking the form user to choose Tags, select which Tags are shown: **All**, or **Filter** by Tag name.



Lesson 24 Lesson 24 Lesson 24

Lesson 24:
Asking for Passage Names from a Folio

- Folio
- Checkboxes fetch answer (pages 13, 132)

In this lesson, you create a "Cookbook" form that asks the form user to select dishes from the "Recipes" Folio.

Prerequisites:

- "Recipes" Folio from Lesson 22 on page 129

1 Create a Questionnaire

a Type or copy/paste this text into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

The Adequate Cookbook
for Adequate Cooks

Here are some recipes you're sure to enjoy.

Happy cooking!

Doxserá (c) 2011-2016 Snapdone, Inc.

Label	Question	Answer
MyRecipes	Which recipes should be included?	

2 Add a Smart Answer

a Put the cursor in the **MyRecipes** answer box and click **Smart Answer**

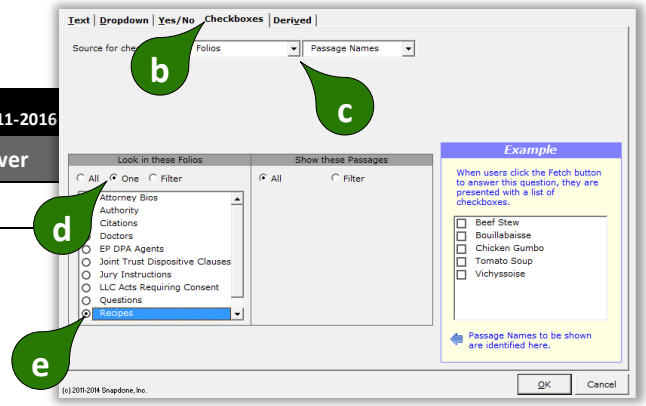
b Click the **Checkboxes** answer type

c Select the source **Folios**, **Passage Names**

d Select **One** Folio

e Select the **Recipes** Folio and click **OK**

Doxserá (c) 2011-2016		
Label	Question	Answer
MyRecipes	Which recipes should be included?	



3 Save your work

Save this form somewhere handy (name it "Cookbook"). We'll finish it in the next lesson.

This form will be used in Lesson 25 on page 135.

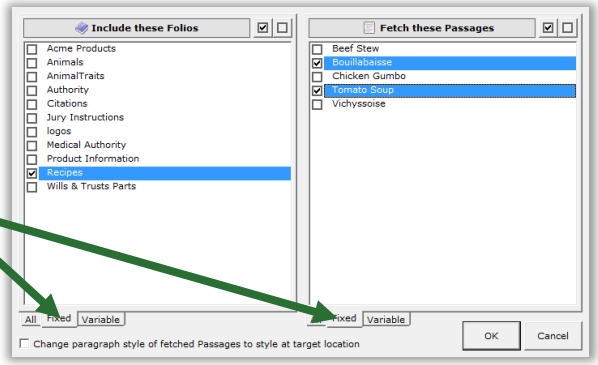
Fetchers

A Fetcher is a marker in a form that automatically finds and fetches Passages when a form is used. It could be relatively static (find our current disclaimer and fetch it into this footer) or highly adaptive (the form user has selected a disease and a treatment; find and fetch all medical authority that justifies the use of that treatment for that disease).

To create a Fetcher, put the cursor in the form where the Passage(s) will appear and click **Fetcher** to open the Fetcher screen.

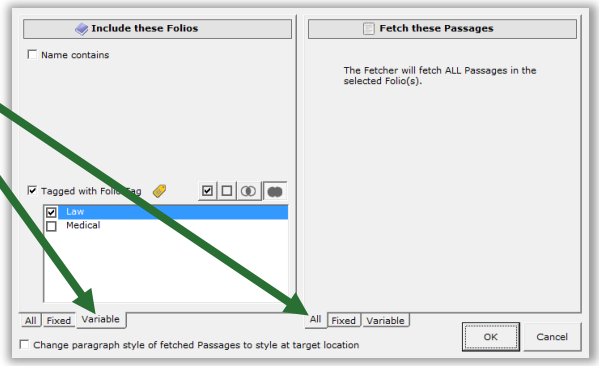
Fetchers are tremendously flexible. The most basic sort of Fetcher uses a **Fixed** Folio selection and a **Fixed** Passage selection.

For example, the screen shown here creates a Fetcher that fetches two Passages (**Bouillabaisse** and **Tomato Soup**) from the **Recipes** Folio during **Fill**.



Select **Variable** to be more flexible, or **All** to include everything.

For example, the screen shown here creates a Fetcher that fetches every Passage from the **Law** category of Folios (Folios that have been tagged with the **Law** Tag).



Lesson 25: Folio Fetchers

- Folio (page 124)
- Fetcher (page 134)

In this lesson, you finish the "Cookbook" form, making it automatically fetch selected Passages.

Prerequisites:

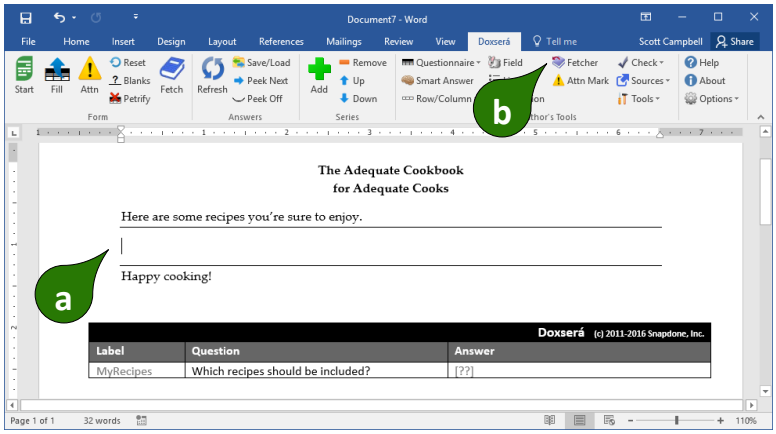
- "Recipes" Folio from Lesson 22 on page 129
- "Cookbook" form from Lesson 24 on page 133

1 Start with sample Form

- Open the "Cookbook" form from Lesson 24 on page 133

a Put the cursor where recipes will be inserted

b Click **Fetcher**



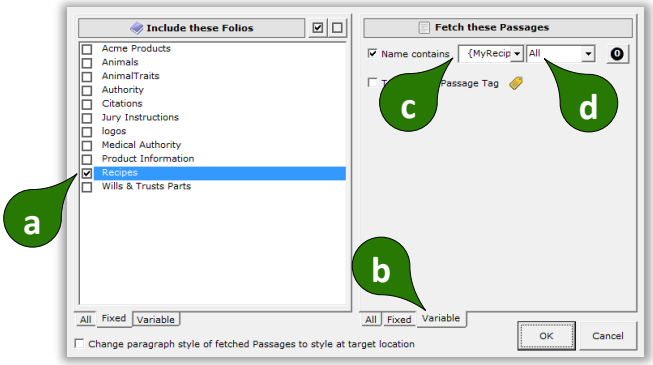
2 Identify Passages to be fetched

a Select the **Recipes** Folio

b Since we don't know in advance which Passages will be used, click **Variable**

c The Passages to be fetched are chosen in the **MyRecipes** answer, so select **Name contains {MyRecipes}**

d Select **All** to include all recipes selected in the **MyRecipes** answer, and click **OK**



3 Save your work

Save your changes to this form so you can continue with it in the next lesson.

This form is now functional, fetching Passages that are individually selected by the form user. We'll modify it two different ways. In Lesson 26 (page 137) we'll allow the user to select a whole category of Passages rather than hand-picking individual Passages. In Lesson 28 (page 144) we'll use a List structure to dress up the appearance of the recipes.

Lesson 26: Asking for a Passage Tag from a Folio

- Folio (page 124)
- Dropdown fetch answer (pages 9, 132)
- Fetcher (page 134)

You will modify the "Cookbook" form so that the form user chooses a recipe category rather than selecting each recipe individually.

Prerequisites:

- "Recipes" Folio from Lesson 22 on page 129
- "Cookbook" form from Lesson 25 on page 135

1 Create a Smart Answer that asks for a Passage Tag

- Open the "Cookbook" form from Lesson 25 on page 135

a Change the question to **Which type of recipes should be included?**

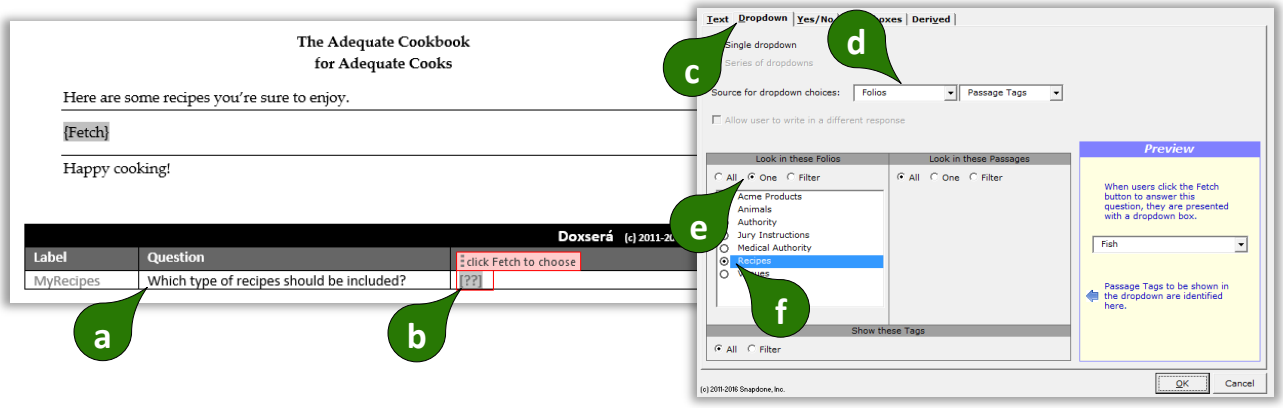
b Put the cursor in the **MyRecipes** answer box and click **Smart Answer**

c Click the **Dropdown** answer type

d Select the source **Folios**, **Passage Tags**

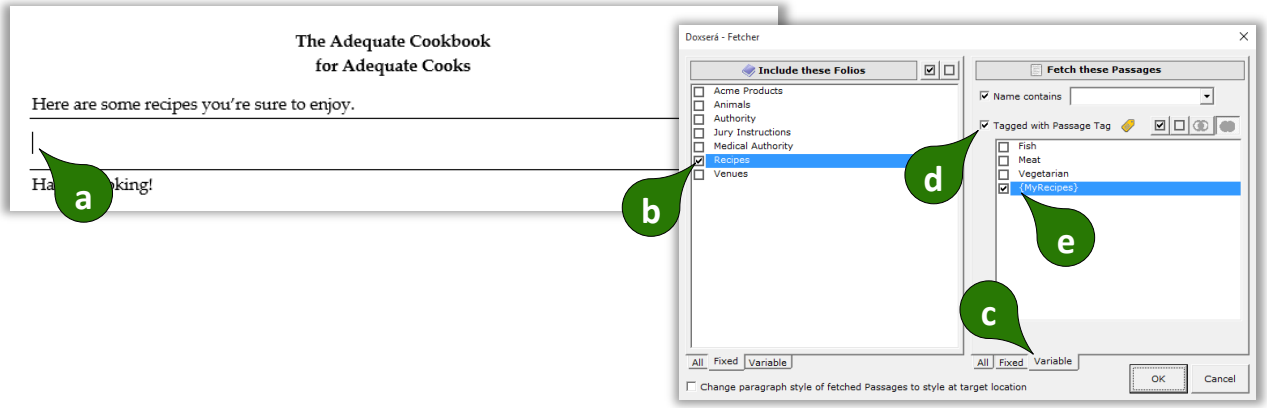
e Select **One** Folio

f Select the **Recipes** Folio and click **OK**



2 **Create a Fetcher that fetches tagged Passages**

- **a** Delete the old **{Fetch}** code, put the cursor where it was, and click **Fetcher**
- **b** Checkmark the **Recipes** Folio
- **c** Click **Variable**
- **d** Checkmark **Tagged with Passage Tag**
- **e** Select the **{MyRecipes}** answer and click **OK**



This form is now functional, fetching a whole set of Passages when the form user chooses a category. But don't save it over the top of the previous Cookbook form, because we're going to use that one again in Lesson 28 (page 144).

Questionnaires in Folios

Coordinating Questionnaires between forms and Folios can lead to astounding results:

- When boilerplate paragraphs are fetched into a document, language within the boilerplate can be customized with info from the Questionnaire of the target document.
- Passages in Folios can contain Conditions that resolve according to answers in the target form's Questionnaire.

Before adding Fields, Lists, and Conditions within Folio Passages, you will need to add a Questionnaire to the Folio document. First open the Folio document: click **Sources**, **Folios**, select a Folio, select any Passage, and click **Edit Content of Passage**. Then add a Questionnaire by (1) clicking **Questionnaire**, **Load** to load a previously saved Questionnaire; or (2) copy/pasting the Questionnaire from a form to the bottom of the Folio document.

Once the Questionnaire is in place, you can add Fields, Lists, and Conditions throughout its Passages just as if you were adding them to an ordinary form. Note that, just like a form, a Folio can only contain *one* Questionnaire, so it's wise to group related Passages in a single Folio where they all share access to the same Questionnaire.

Important: Be sure answer labels in the Folio's Questionnaire correspond to answer labels in forms where the Folio's Passages will be used. For example, suppose your Real Estate Agreement form fetches Passages from the **RE Provisions** Folio. The form includes a question labeled **OwnerName** and **{OwnerName}** fields. To include the owner's name within Passages in the **RE Provisions** Folio, make sure its Questionnaire

includes a matching **OwnerName** question. When the form is used, the response to the **OwnerName** question in the form's Questionnaire will be used to fill in **{OwnerName}** fields in both the original form and in Passages fetched from the **RE Provisions** Folio.

Lesson 27: Questionnaires in Folios

- Folio (page 124)
- Dropdown fetch answer (pages 9, 132)
- Fetcher (page 134)

In this lesson, your law firm practices in two venues. Rather than create a separate form for each venue, you create a single form that asks the form user to choose a venue.

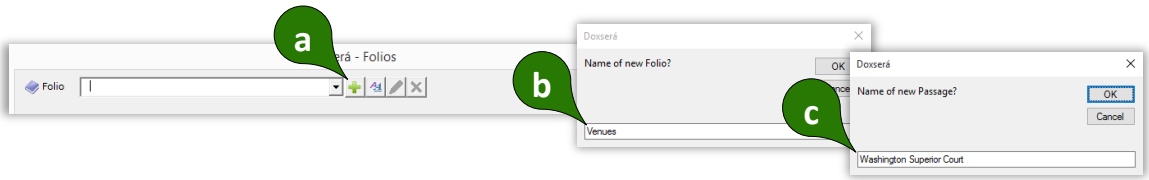
1 Create a Folio and its first Passage

- Click **Sources**, **Folios** to open the Folios screen

a Click to add a new Folio

b Type the Folio name **Venues** and click **OK**

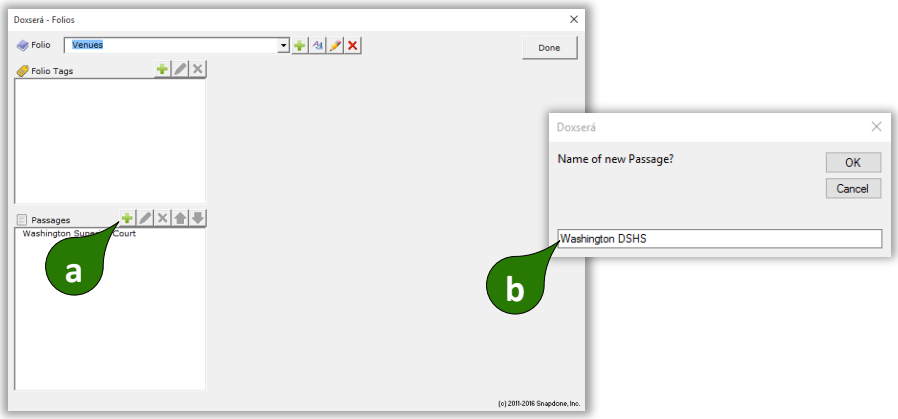
c Type the first Passage name **Washington Superior Court** and click **OK**



2 Add a second Passage

a Click to add a new Passage

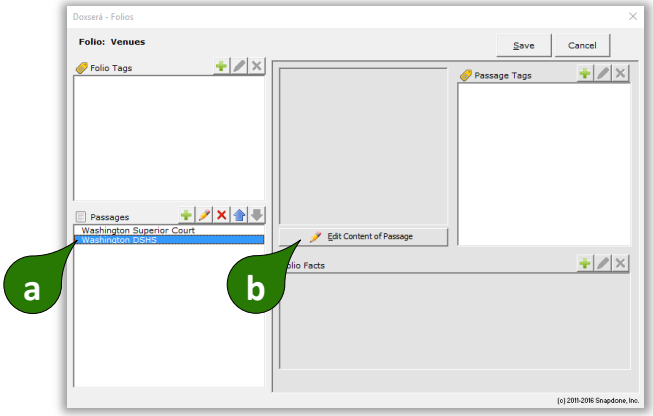
b Type the Passage name **Washington DSHS** and click **OK**



3 Open the Folio document

a Select any Passage

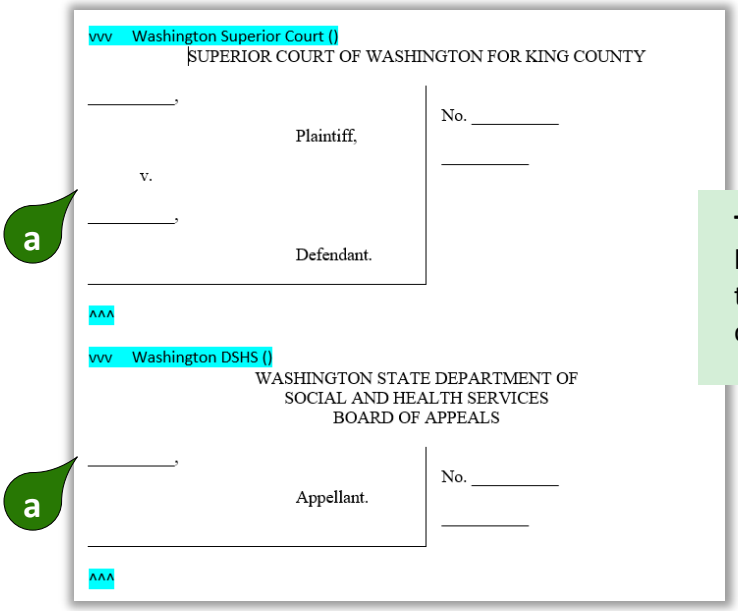
b Click **Edit Content of Passage**



4 Edit content of Passages

a Between the blue arrows, create a caption for each venue similar to those shown below

- Click **Sources**, **Folios** to return to the Folios screen, and click **Save** to save your changes.



Tip: Use a 2x1 table with some border lines turned off to split the left and right halves of a caption.

5 Create the Questionnaire

- **a** Type or copy/paste this text into a blank document
- Click **Questionnaire**, **Create** to add a Questionnaire
- **b** Fill in the Questionnaire as shown

[caption]

Defendant _____ moves the Court to rule that all charges should be dismissed.

Doxserá (c) 2011-20

Label	Question	Answer
CaseVenue	Venue	
CauseNum	Cause number	
ClientName	Name of client	
OppName	Name of opponent	
PldgTitle	Title of pleading	Motion to Dismiss

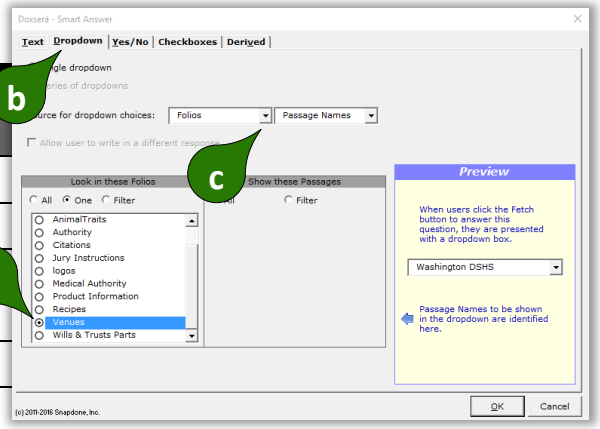
In addition to the **ClientName** question used in this form, we also include questions that will be used in the "Venues" Folio.

6 Create a Fetch answer

- **a** Put the cursor in the **CaseVenue** answer box and click **Smart Answer**
- **b** Click the **Dropdown** answer type
- **c** Choose source **Folios**, **Passage Names**
- **d** Choose the **Venues** Folio and click **OK**

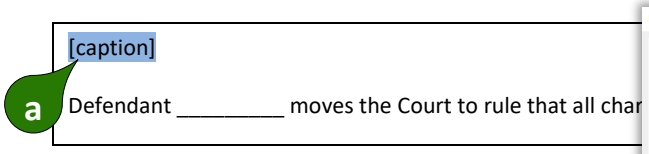
Doxserá (c) 2011-2016 Sn

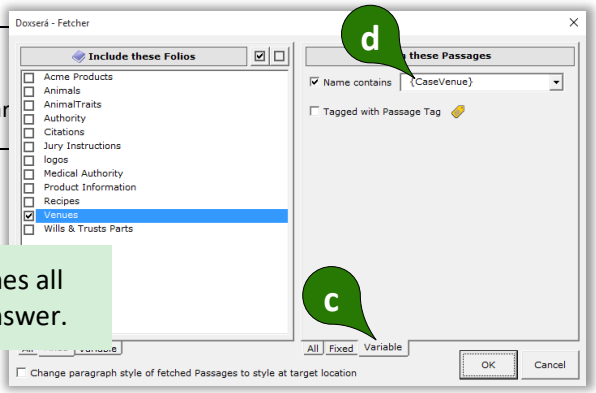
Label	Question	Answer
CaseVenue	Venue	
CauseNum	Cause number	
ClientName	Name of client	
OppName	Name of opponent	
PldgTitle	Title of Pleading	Motion to Dismiss



7 Create a Fetcher

- **a** Delete **[caption]**, place the cursor where it was, and click **Fetcher**
- **b** Checkmark the **Venues** Folio
- **c** Select **Variable** Passages
- **d** In the **Name contains** box, select the **{CaseVenue}** answer

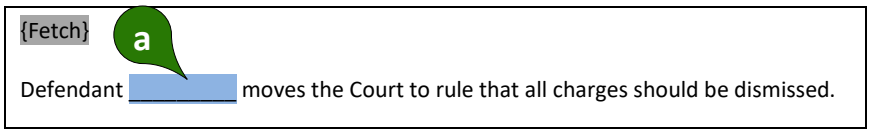




This Fetcher looks in the **Venues** Folio and fetches all Passages that are named in the **{CaseVenue}** answer.

8 Add a Field

- **a** Select the blank line where the client's name belongs
- Click **Field**, select **ClientName**, and click **OK** to add a **{ClientName}** Field to the form

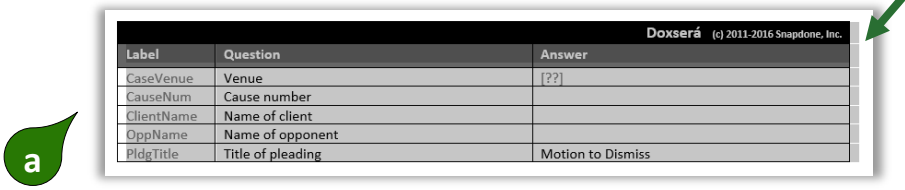


9 Save the form

Save the finished form with the name "Motion to Dismiss"

10 Copy the Questionnaire

- **a** Select the whole Questionnaire, making sure to include the "phantom" column along the right edge, and copy with **Ctrl+C**



11 Paste Questionnaire into the Folio document

- Click **Sources**, **Folios** to open the Folios screen

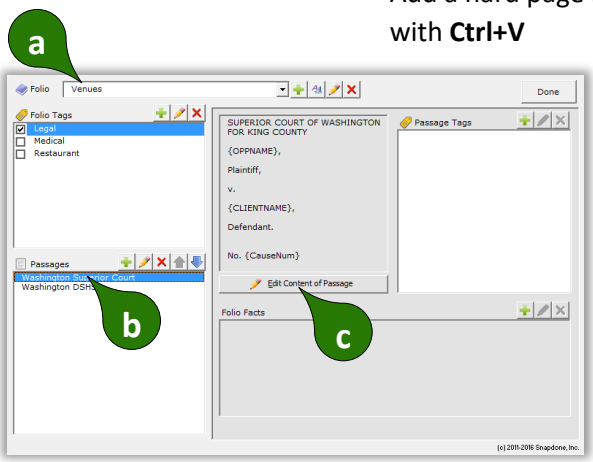
a Select the **Venues** Folio

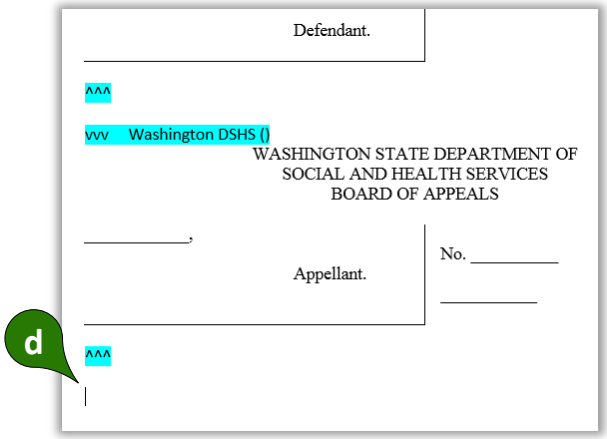
b select any Passage

c Click **Edit Content of Passage** to open the Folio document

d Put the cursor at the end of the Folio document, making sure it is below the ^^^

- Add a hard page break (**Ctrl+Enter**), then Paste the copied Questionnaire with **Ctrl+V**

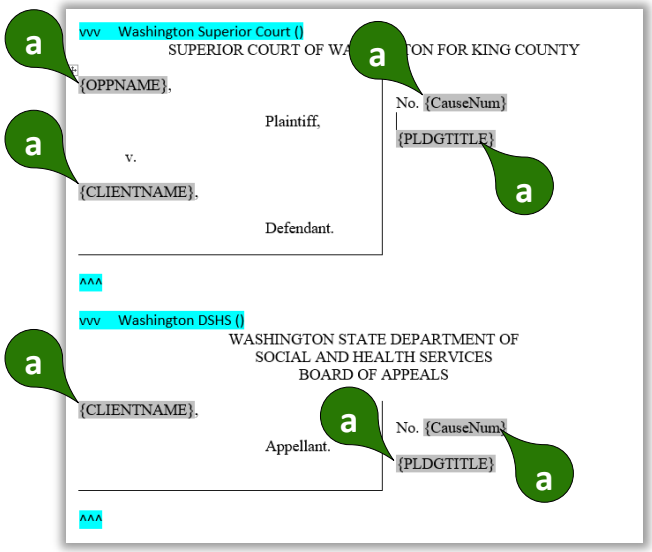




12 Add Fields to Passages

a Now that the Folio contains a Questionnaire, you can click **Field** to add Fields everywhere they're needed in both Passages

- Click **Sources**, **Folios** to return to the Folios screen, and **Save** to save your work



Lesson 27 Lesson 27 Lesson 27

THE PAYOFF

When the form is Filled, answers from the Questionnaire are used to fill in not only the Fields in the original form, but also Fields in the fetched caption.

SUPERIOR COURT OF WASHINGTON FOR KING COUNTY

JANE SMITH, Plaintiff, v. JOHN DOE, Defendant.	No. 123-45678 MOTION TO DISMISS

Defendant John Doe moves the Court to rule that all charges should be dismissed.

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Label	Question	Answer
CaseVenue	Venue	Washington Superior Court
CauseNum	Cause number	123-45678
ClientName	Name of client	John Doe
OppName	Name of opponent	Jane Smith
PldgTitle	Title of pleading	Motion to Dismiss

Lesson 27 Lesson 27 Lesson 27

Folios and Lists

Passages in Lists

Some forms require not only that Passages be inserted, but that they be arranged in a particular way and perhaps embellished. This is done by arranging the Passages in a List, a three-step process: (1) create a Smart Answer that allows the form user to select Passages; (2) add a List to the form that lists the Passage names; and (3) customize the List by adding Fetchers.

Lesson 28 Lesson 28 Lesson 28

Lesson 28: Folio Passages in Lists

- Folio (page 124)
- List (page 49)
- Fetcher (page 134)

You will modify the "Cookbook" form so that each fetched recipe is preceded with the recipe's name.

Prerequisites:

- "Recipes" Folio from Lesson 22 on page 129
- "Cookbook" form from Lesson 25 on page 135

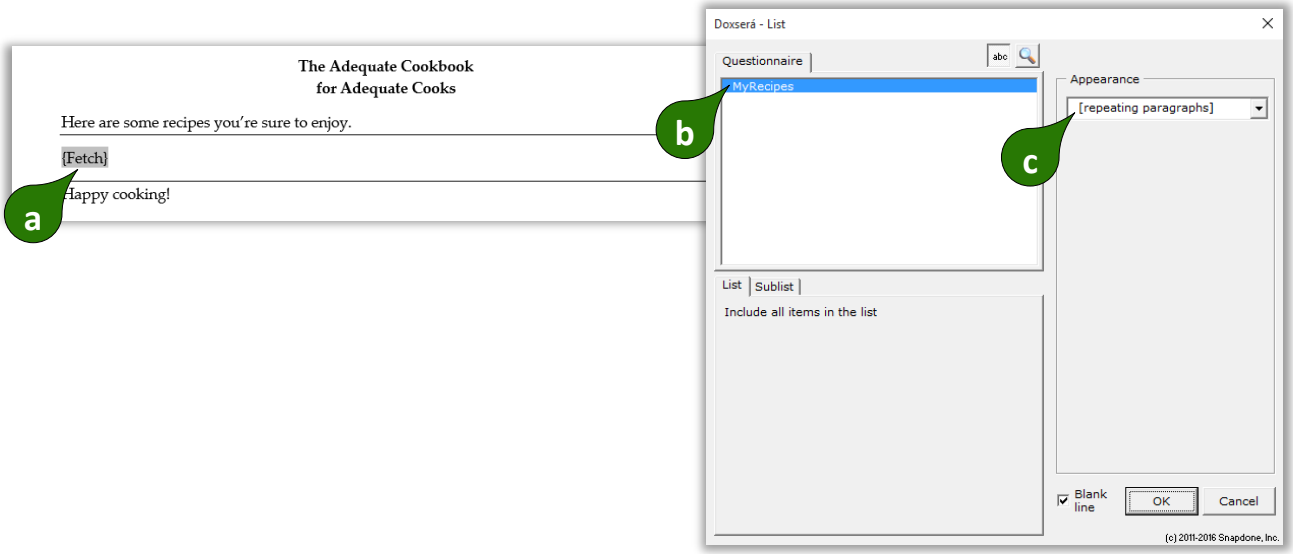
1 Add a List

- Open the "Cookbook" form from Lesson 25 on page 135 (if you mistakenly overwrote during Lesson 26, you need to switch the Smart Answer type back to Checkboxes, Folios, Passage Names)

a Delete the old **{Fetch}** code, put the cursor where it was, and click **List** to open the List screen

b Select the **MyRecipes** answer

c Select the **[repeating paragraphs]** appearance and click **OK**



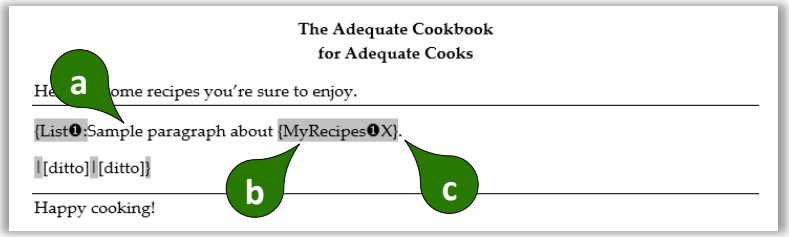
2 Customize the List

a Delete **Sample paragraph about**

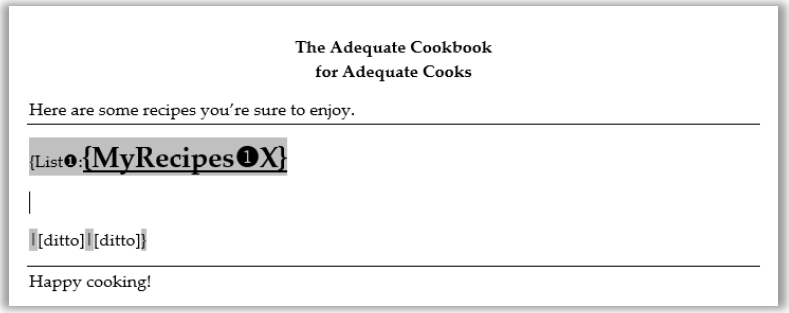
b **{MyRecipes❶X}** marks where each Passage's name will appear — make it bold, underlined, and a larger font size.

c Replace the period with a hard return (**Enter**)

Before



After



3 Add a Fetcher

a Put the cursor in the blank line where a recipe will be fetched and click **Fetcher**

b Select the **Recipes** Folio

c Select **Variable** Passages

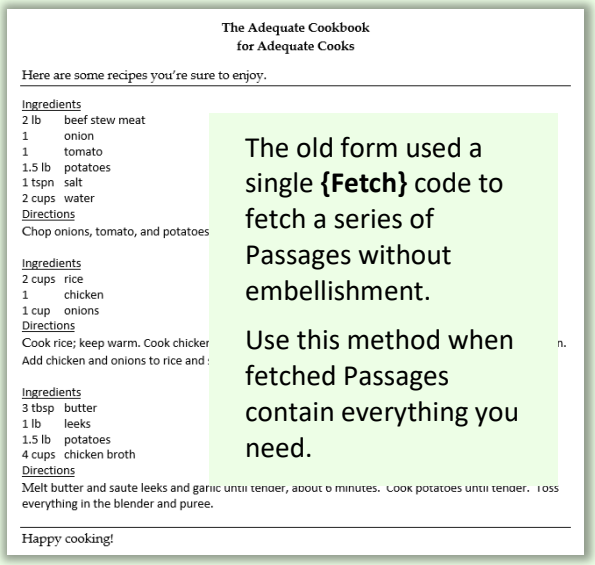
d In the **Name contains** box, select **{MyRecipes}** and click **OK**

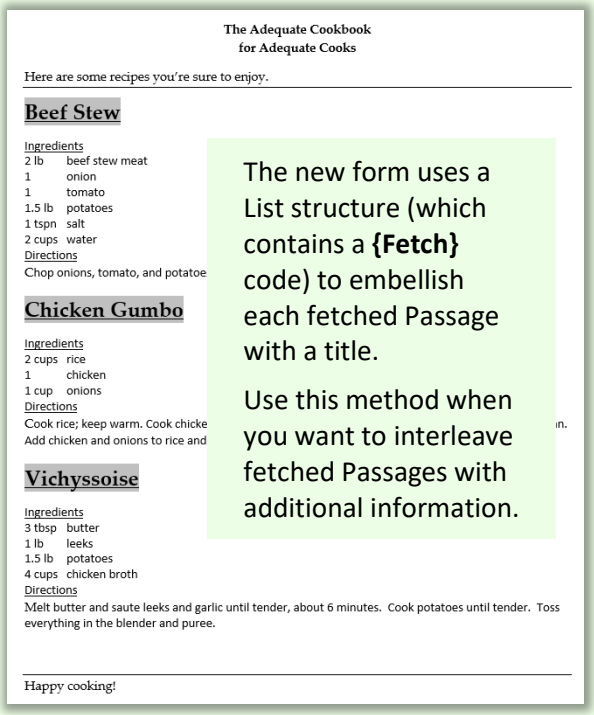
4 Save your work

Save your changes to this form. We'll use it again in the next lesson.

This form will be used in Lesson 29 on page 148.

THE PAYOFF





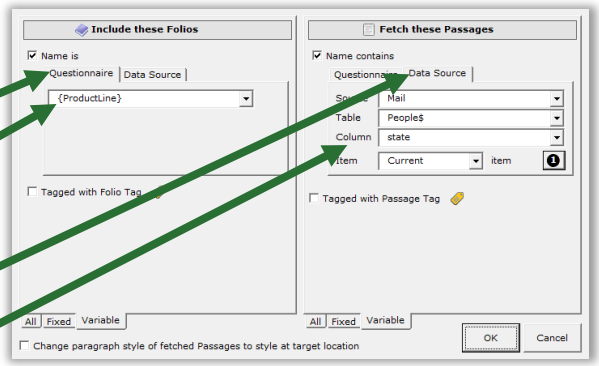
Data-Driven Fetchers

When creating variable (non-fixed) Fetchers within a List structure (see page 50 to learn about customizing Lists), the targeted Folio and Passage can be determined either by answers in the *Questionnaire* or by info in a *Data Source*.

For example, this Fetcher occurs within a List of people that's pulled from a Data Source.

The name of the Folio where the Passage can be found is provided by an answer in the **Questionnaire**. (To be more specific, the name of the Folio is contained in the the **ProductLine** answer.)

The name of the Passage to be fetched from that Folio is provided by info in the **Data Source**. (To be more specific, the name of the Passage is found in the **Mail** Data Source, in the **People$** table, in the **state** column, for the **Current** person in the List.)



The result is a form that lists people from a Data Source, and for each listed person a Passage related to that person's state of residence is inserted. So the "Arizona" Passage is inserted for Joe who lives in Arizona, and the "Alaska" Passage is inserted for Jane who lives in Alaska.

Folio Facts in Lists

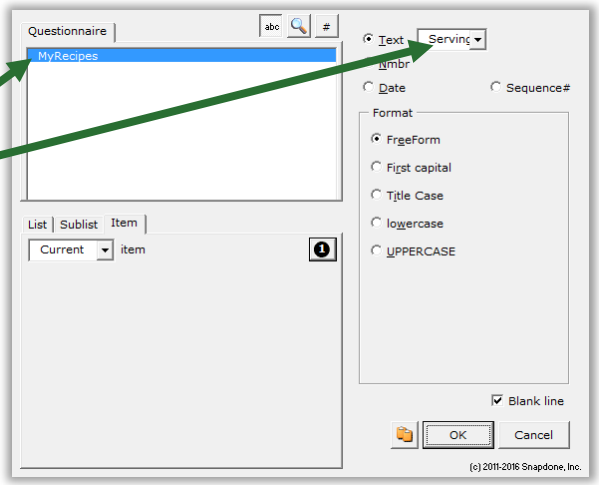
When Passages are used in a form, Folio Facts (page 128) related to those Passages can also be used. For example:

- When a selected doctor's bio is fetched from a Folio of bios, the doctor's first name and number of years in practice could be inserted elsewhere in the form.
- A catalog form that fetches part descriptions into the left column of a table could also insert part numbers and prices into the middle and right columns.

To retrieve a Folio Fact, put the cursor where you want the Folio Fact to appear and click **Field**.

Select the answer that contains the Passage chosen by the form user.

Select the desired Folio Fact and click **OK**.



Lesson 29: Folio Facts in Lists

- Folio (page 124)
- Folio Fact (page 128)

In this lesson, the "Cookbook" form's list of recipes is embellished with serving sizes.

Prerequisites:

- "Recipes" Folio from Lesson 22 on page 129
- "Cookbook" form from Lesson 28 on page 144

1 Customize the List

- Open the "Cookbook" form from Lesson 28 on page 144

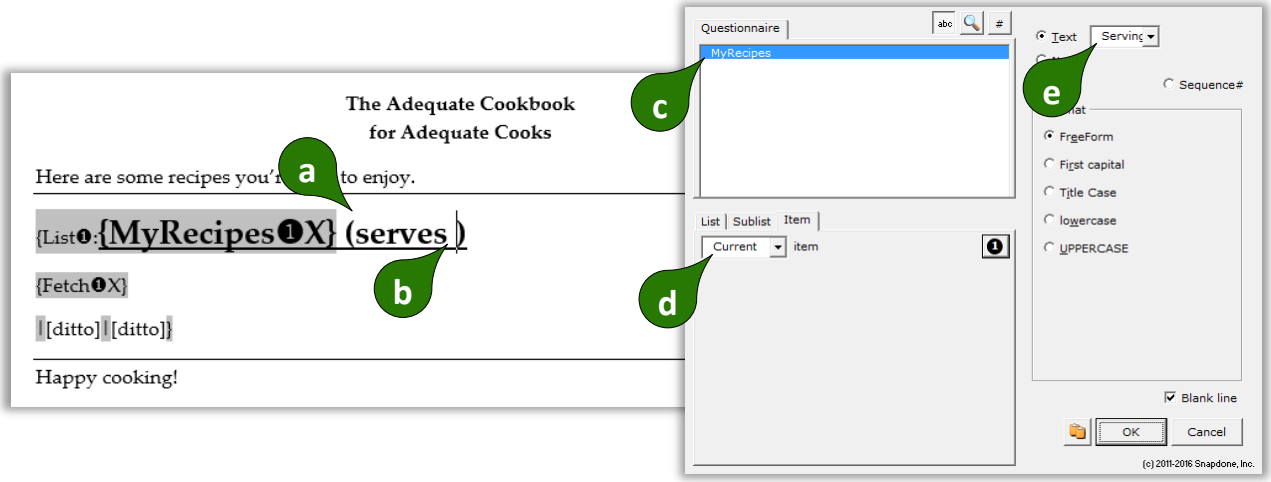
a Type **(serves)** after the **{MyRecipes#X}** Field

b Put the cursor where the serving number belongs and click **Field**

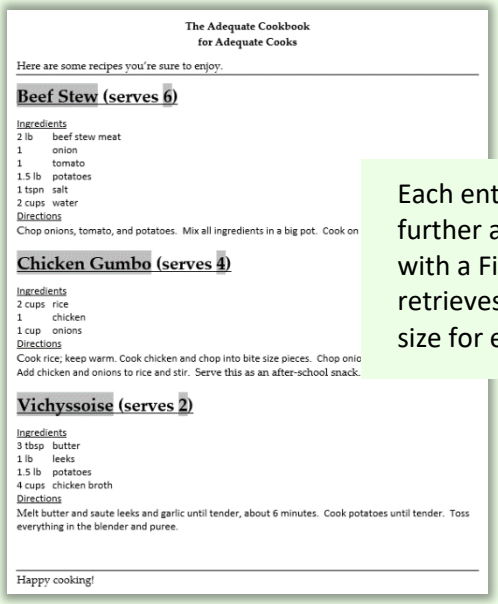
c Select the **MyRecipes** answer

d Select the **Current** item in the List

e Select the **Servings** Folio Fact and click **OK**



THE PAYOFF



Each entry has been further augmented with a Field that retrieves the serving size for each recipe.

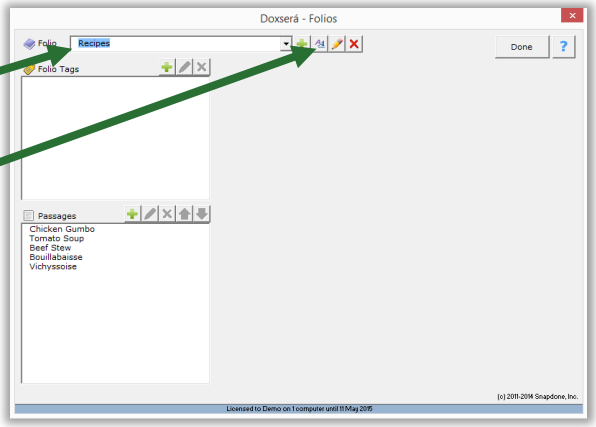
Folios and Styles

Microsoft Word's "styles" feature is often used to format text. It's possible for the format of identically named styles in two documents to differ. For example, the **Heading 1** style in Folio X might be **bold and underlined**, while the **Heading 1** style in Form Y might be *italic and blue*. When a Passage from Folio X is inserted into Form Y, headings that were **bold and underlined** in the source Folio become *italic and blue* in the target form. This effect is often undesirable, and can be managed by making styles in the Folio and the target form identical.

Open a target form into which Passages will be inserted and click **Sources**, **Folios** to open the Folios screen.

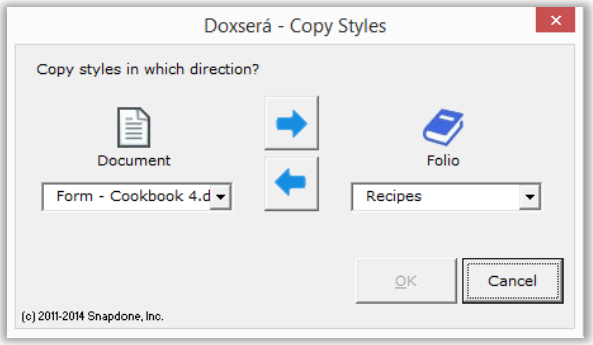
Select the source Folio.

Click to open the Copy Styles screen.



Click to copy styles from the form to the Folio, or to copy styles from the Folio to the form, then click **OK**.

If there are lots of styles and the form and Folio are large, it will take a while – don't be alarmed.



Folio Screen Details

Folios Screen

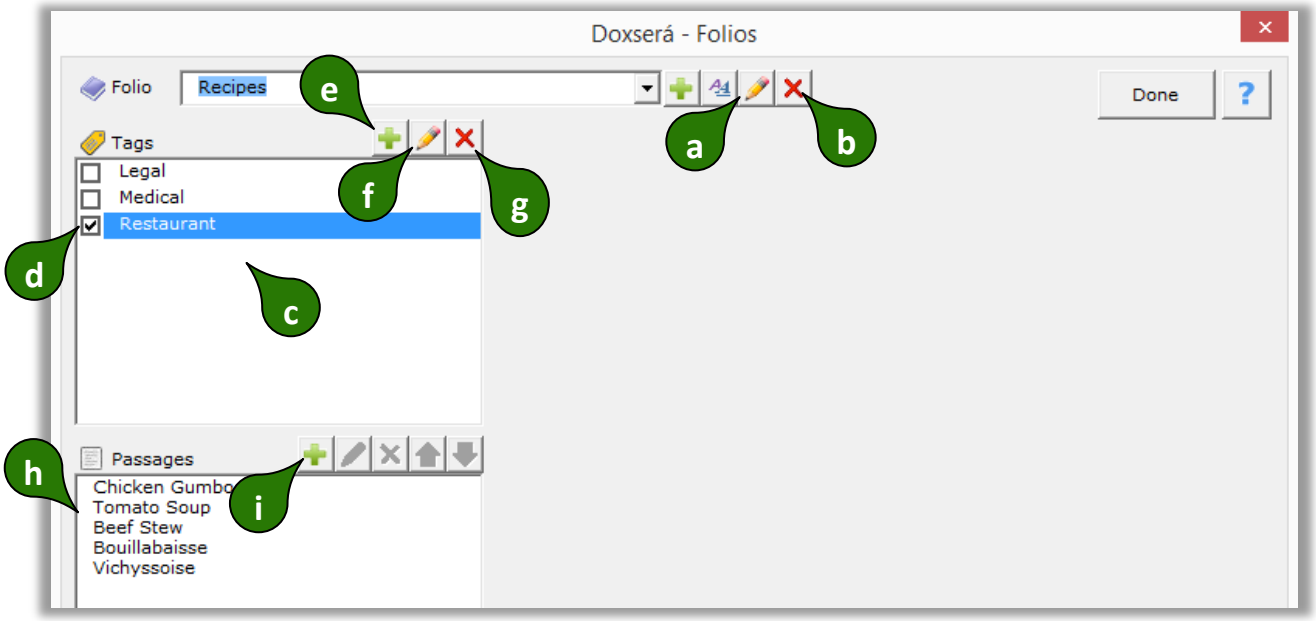
Click **Sources**, **Folios** to open the Folios screen.

a Select a Folio here

b Click to create a new Folio. **Note:** If a Folio is selected in box **a**, you will have the option to use it as a model for the new Folio, preserving styles and any Questionnaire contained in the source Folio.

c Click to reconcile styles in the selected Folio with another document (page 149).

After selecting a Folio:



a Click to rename the selected Folio. **Warning:** Any forms that refer to this Folio by name will need to be updated.

b Click ✕ to delete the selected Folio. **Warning:** Any forms that refer to this Folio by name will need to be updated.

c Like Passages, Folios can also be tagged. All available Folio Tags are listed here. **Note:** If a Tag is not assigned to any Folios, it will disappear from this list when this screen is closed.

d Assign a Folio Tag to the selected Folio by checkmarking it here. **Note:** Multiple Tags can be assigned to a single Folio.

e Click to add a new Folio Tag.

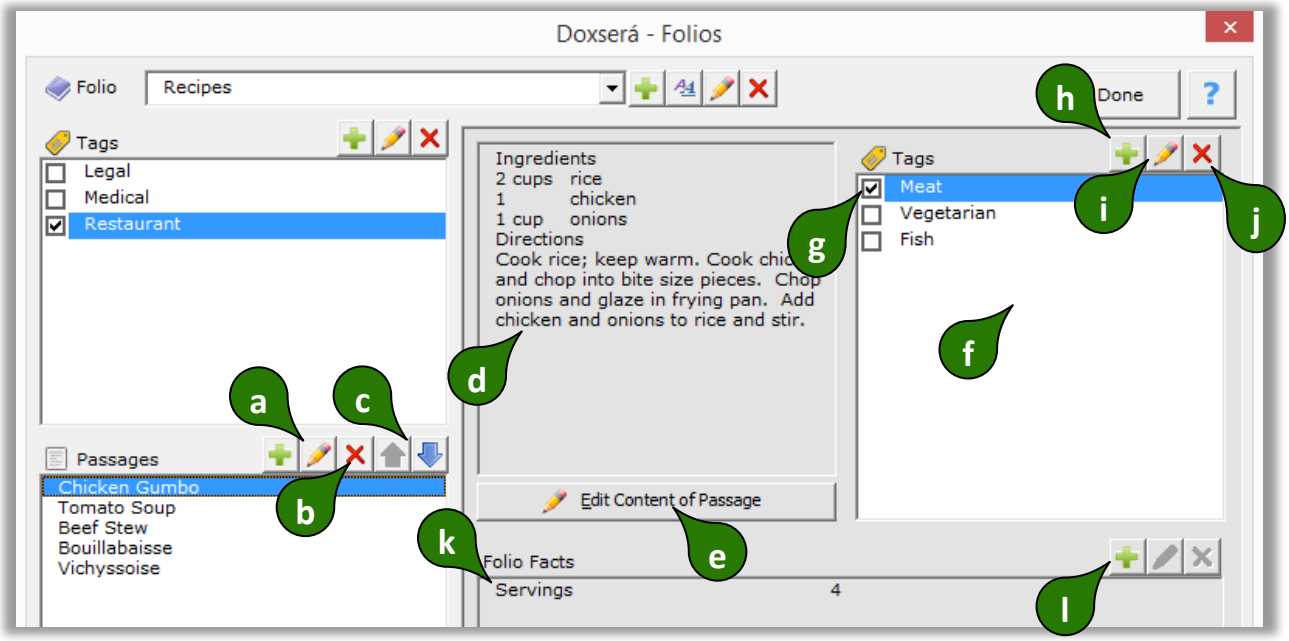
f Click to rename the selected Folio Tag. Any Folios that were previously tagged with this Tag will be tagged with the new Tag name. **Warning:** Any forms that refer to this Tag by name will need to be updated.

g Click ✕ to delete the selected Folio Tag. Any Folios that were previously tagged with this Tag will no longer be so tagged. **Warning:** Any forms that refer to this Tag by name will need to be updated.

h All Passages contained in the selected Folio are listed here. Select a Passage to see its details.

i Click to add a new Passage to the selected Folio.

After selecting a Passage:



a Click to rename the selected Passage. **Warning:** Any forms that refer to this Passage by name will need to be updated.

b Click ✕ to delete the selected Passage. **Warning:** Any forms that refer to this Passage by name will need to be updated.

c Click to move the selected Passage up or down in the Folio. **Note:** Folio Passages are not necessarily alphabetized. In some cases, form authors may decide another arrangement is more useful.

d The content of the selected Passage is previewed here.

e Click **Edit Content of Passage** to open a Folio document for the selected Folio, and move the cursor to the currently selected Passage. All editing of Passage contents occurs in the Folio document. When revisions are complete, click **Sources**, **Folios** to return to this screen.

f All Tags contained in the selected Folio are listed here.

g Assign a Passage Tag to the selected Passage by checkmarking it here. **Note:** Multiple Tags can be assigned to a single Passage.

h Click to add a Tag to the list of Passage Tags. **Note:** If a Tag is not assigned to any Passages, it will disappear from this list when this screen is closed.

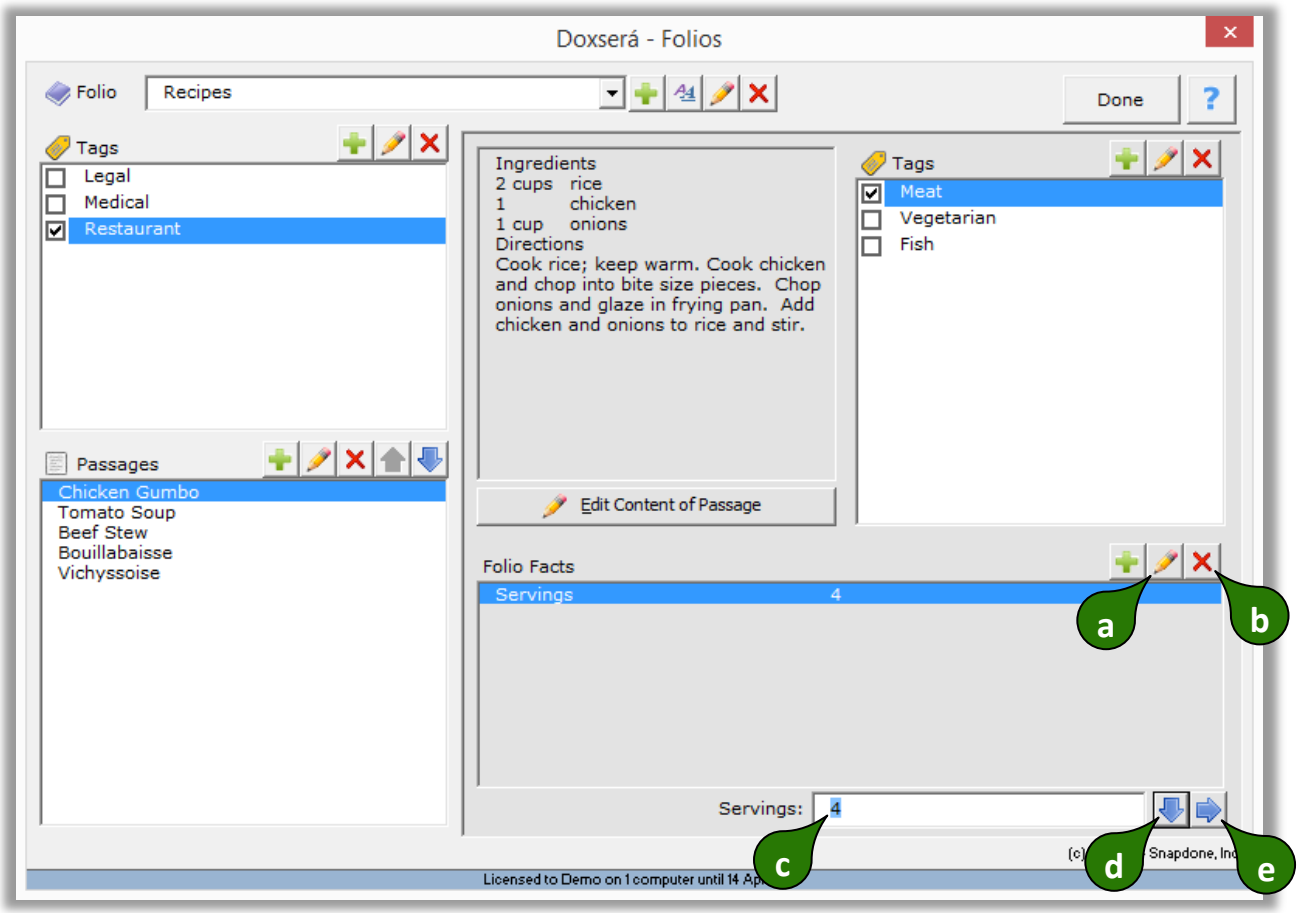
i Click to rename the selected Passage Tag. Any Passages that were previously tagged with this Tag will be tagged with the new Tag name. **Warning:** Any forms that refer to this Tag by name will need to be updated.

j Click ✕ to delete the selected Passage Tag. Any Passages that were previously tagged with this Tag will no longer be so tagged. **Warning:** Any forms that refer to this Tag by name will need to be updated.

k All Folio Fact labels that occur in the selected Folio are listed here. Facts that have been filled in for the selected Passage are also shown. Select a Fact to modify it. **Note:** If a Folio Fact is not filled in for any Passages in the selected Folio, it will disappear from this list when this screen is closed.

l Click ✚ to add a new label to the list of Folio Facts for the selected Folio.

After selecting a Folio Fact:



a Click ✎ to relabel the selected Fact in every Passage that contains it. **Warning:** Any forms that refer to this Fact by name will need to be updated.

b Click ✕ to delete the selected Fact from all Passages in this Folio. **Warning:** Any forms that refer to this Fact by name will need to be updated.

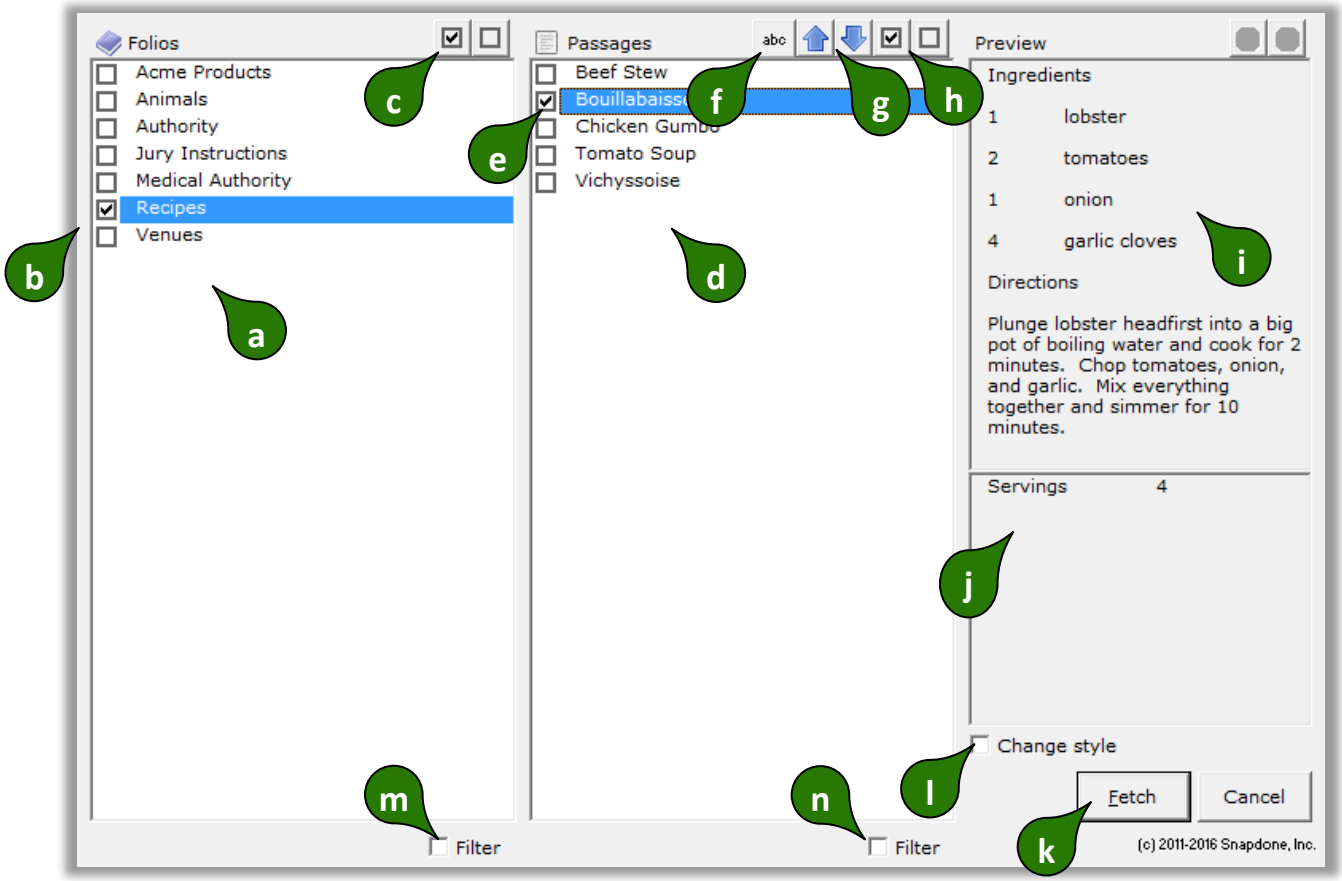
c Use this box to edit the selected Fact for the selected Passage.

d Click ⬇ (or press **Enter**) to move to the next Fact in the list. **Note:** This button only appears when the cursor is in box **c**.

e Click ➡ (or press **Alt+N**) to move to the next Passage in the list. **Note:** This button only appears when the cursor is in box **c**.

Fetch Screen

Click **Fetch** to open the Fetch screen.



a All Folios are listed here.

b Checkmark one or more Folios to see the Passages they contain.

c Click ☑ to select all Folios or ☐ to select none.

d All Passages contained in the selected Folios are listed here.

e Checkmark one or more Passages to select them, either for insertion into a document or to respond to a fetch question.

f Click **abc** to toggle sorting, either alphabetical or the order that they appear in the Folio.

g When fetching multiple Passages, you may want to insert them in a particular order. Click ⇧⇩ to move the selected Passage up or down in the list.

h Click ☑ to select all Passages or ☐ to select none.

i The contents of the currently selected Passage are previewed here.

j If the currently selected Passage includes Folio Facts, they are listed here.

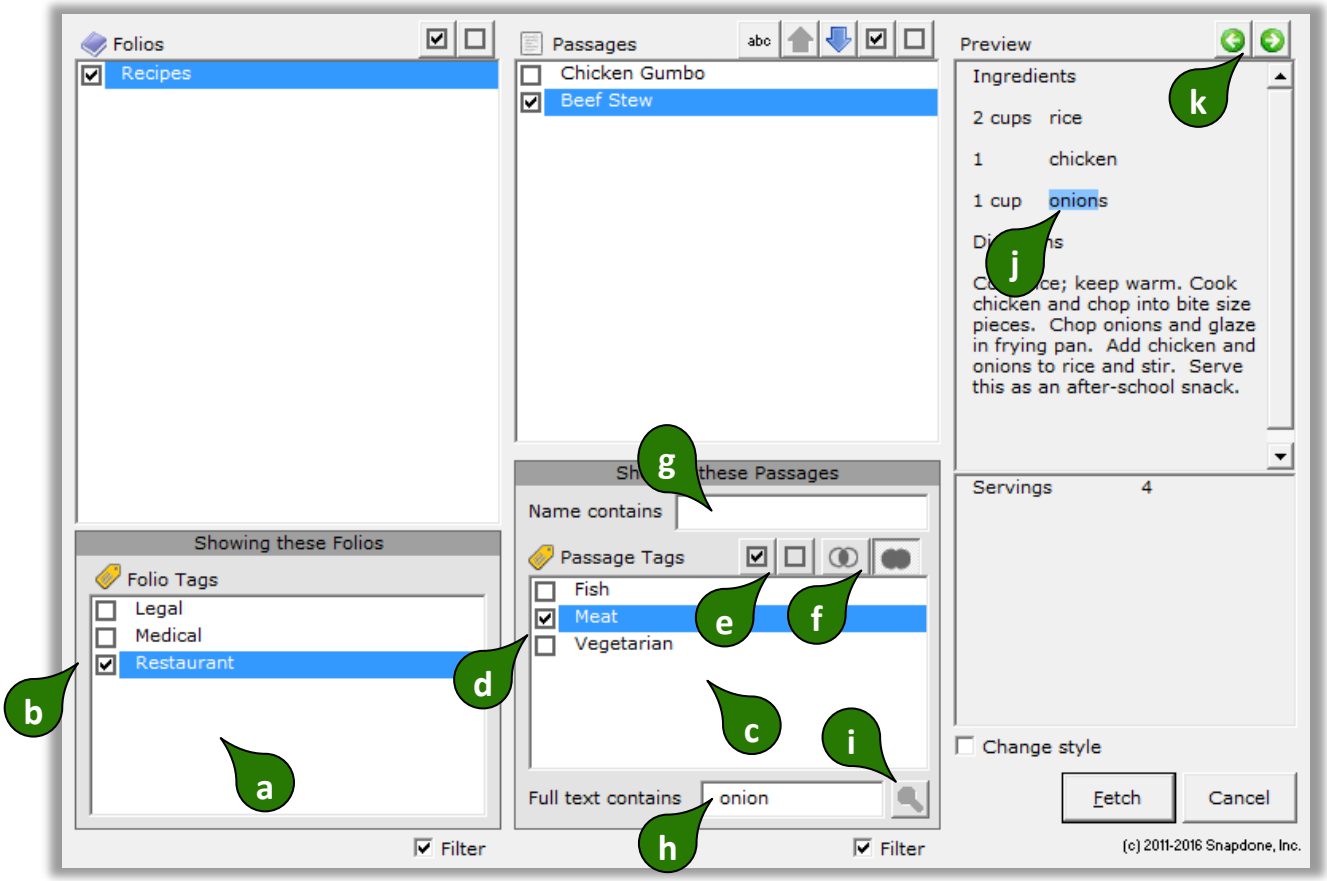
k After selecting Passages, click **Fetch** to either insert them in a document or respond to a Fetch question.

l Checkmark **Change style** to change styles in the fetched Passage to the style at the cursor (page 157).

m Checkmark **Filter** to show the Folio search panel.

n Checkmark **Filter** to show the Passage search panel.

After turning on the search panels (**m** and **n** above):



a All Folios Tags are listed here.

b Checkmark one or more Folio Tags to choose which Folios are shown.

c All Passage Tags in the selected Folios are listed here.

d Checkmark one or more Passage Tags to choose which Passages are shown.

e Click ☑ to select all Passage Tags or ☐ to select none.

f Click ◯ or ● to control how Tag filters are applied. When ◯ is selected, only Passages tagged with *all* of the selected Tags are shown. When ● is selected, Passages tagged with *any* of the selected Tags are shown.

g When text is typed here, only Passages that contain that text in their name are shown.

h To search the content of Passages, type a search term here and click 🔍 to find Passages that contain it.

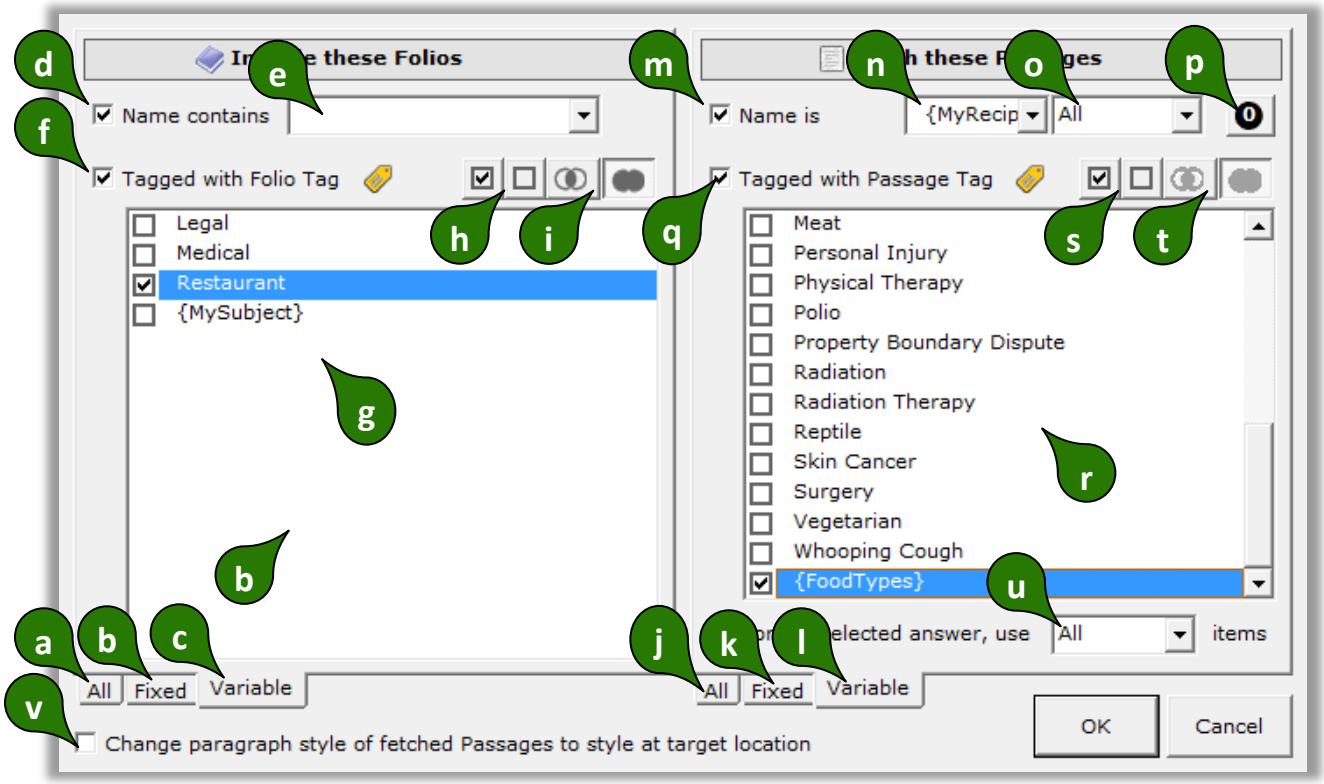
i Click 🔍 to search after typing a search term in box **h**.

j After searching with **h** and **i**, the search term is highlighted in the preview of found Passages.

k After searching with **h** and **i**, click to highlight the previous or next occurrence of the search term in the Preview panel.

Fetcher Screen

Click **Fetcher** to open this screen.



a Click **All** if the Passages to be fetched are drawn from the pool of all Folios. **Note:** It takes longer to look in **All** Folios, so use **Fixed** or **Variable** whenever possible.

b Click **Fixed** if the Passages to be fetched are drawn from a limited set of Folios that you can identify right now. (This is the most common setting – you will typically identify a single Folio here.)

c Click **Variable** if the Passages to be fetched are drawn from a flexible set of Folios identified with the Folio filtering controls (**d** thru **i**).

d Checkmark **Name contains** to filter the set of Folios by name.

e When filtering Folios by name with **d**, either (1) type text here to include only Folios whose name contains that text; or (2) select a Questionnaire answer here to include Folios that are selected by the form user in a fetch answer that asks for Folio names.

f Checkmark **Tagged with Folio Tag** and checkmark Tags in **g** to filter the set of Folios.

g This list includes (1) all Folio Tags, and (2) any Questionnaire answers that ask for Folio Tags. When the latter is checkmarked, the form user's answer to that question determines which Folio Tag(s) apply to the filter.

h Click ☑ to select all Folio Tags or ☐ to select none.

i Click ◐ or ● to control how Tag filters are applied. When ◐ is selected, only Folios tagged with *all* of the selected Tags are shown. When ● is selected, Folios tagged with *any* of the selected Tags are shown.

j Click **All** to create a Fetcher that fetches all Passages in the selected Folios.

k Click **Fixed** if you can identify the Passages to be fetched right now.

l Click **Variable** to allow for a flexible selection of Passages identified with the Passage filtering controls (**m** thru **u**).

m Checkmark **Name contains** to filter the set of Passages by name.

n When filtering Passages by name with **m**, either (1) type text here to include only Passages whose name contains that text; or (2) select a Questionnaire answer here to include Passages that are selected by the form user in a fetch answer that asks for Passage names.

o When **n** is used to select an answer that includes multiple Passages, this box indicate which ones are included. (You will usually choose **All** to include all the Passages selected by the form user.)

p If the Fetcher occurs within a nested List of Passages, the layer selector button allows selection of containing layers (page 54).

q Checkmark **Tagged with Passage Tag** and checkmark Tags in **r** to filter the set of fetched Passages.

r This list includes (1) Passage Tags that exist in the selected Folios; and (2) any Questionnaire answers that ask for Passage Tags. When the latter is checkmarked, the form user's answer to that question determines which Passage Tag(s) are applied to the filter.

s Click ☑ to select all Passage Tags or ☐ to select none.

t Click ◐ or ● to control how Tag filters are applied. When ◐ is selected, only Passages tagged with *all* of the selected Tags are fetched. When ● is selected, Passages tagged with *any* of the selected Tags are fetched.

u When **r** is used to select an answer that includes multiple Passage Tags, this box indicates which ones are included. (You will usually choose **All** to include all the Passage Tags selected by the form user.)

v Checkmark **Change paragraph style…** if you want to change the style of each fetched paragraph to the style of the Fetcher (page 149).

Users

Using Folios

Fetching Passages

The **Fetch** command makes it quick and easy to find text that's been stored in a Folio and insert it at any location in a document. Put the cursor in a document where you want to insert text and click **Fetch** to open the Fetch screen.

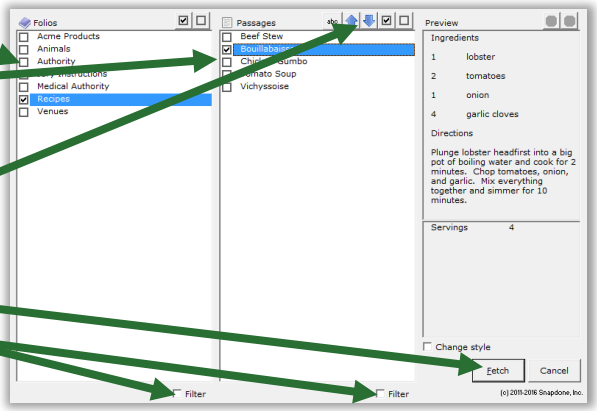
Select one or more Folios to see the Passages they contain.

Select one or more Passages to be inserted in the document.

Use ⬆⬇ to change the order of Passages if desired.

Click **Fetch** to insert the selected Passages.

For advanced searching techniques, click **Filter** to reveal the search panels shown below.

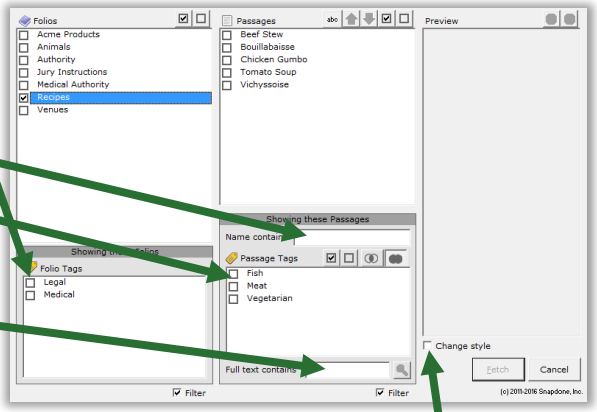


Select one or more Folio Tags to show only Folios that are so tagged.

Type a word in the Passage **Name contains** box to show only Passages that include that word in their name.

Select one or more Passage Tags to show only Passages that are so tagged.

To search for text contained within a Passage, type a word in the **Full text contains** box and click 🔍 .



If style formatting is an issue, use the **Change style** checkbox. When this box is <u>unchecked</u> (the default), paragraph styles assigned in the Folio are retained. So a paragraph that uses **Heading 1** style in the Folio still uses **Heading 1** style after it is inserted in the document. (But if the format of **Heading 1** in the Folio differs from that in the document, the inserted text will conform to the format defined in the document – see page 149.) When this box is <u>checked</u>, paragraph styles assigned in the Folio are abandoned, and all inserted paragraphs are instead formatted with the style at the cursor's location in the document.

Lesson 30: Fetching Folio Passages

- Folio (page 124)
- Fetch (page 156)
- Passage Tag (page 126)

In this lesson, you are typing a letter and want to insert some recipes.

Prerequisites:

- "Recipes" Folio from Lesson 22 on page 129

1 Find and fetch a Passage with Tags

- Select a spot in a document where you want to insert a vegetarian recipe and click **Fetch**

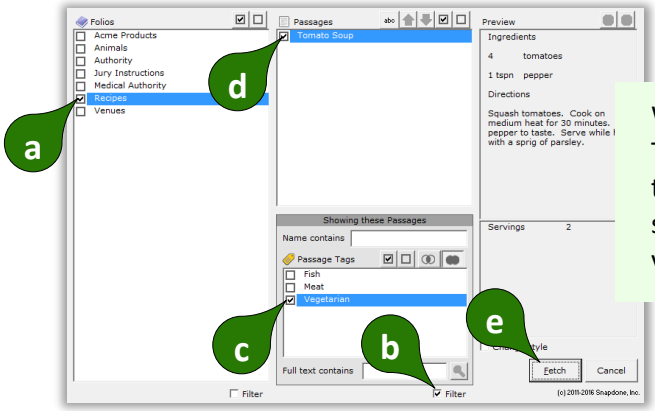
a Select the **Recipes** Folio

b Click **Filter** to show the search panel

c Select the **Vegetarian** Tag

d Checkmark **Tomato Soup**

e Click **Fetch** to insert the recipe in the document



When the **Vegetarian** Tag is checkmarked, the list of Passages shrinks to show only vegetarian recipes.

2 **Find and fetch Passages with full text search**

- Select a spot in a document where you want to insert some garlicky recipes and click **Fetch**

a Select the **Recipes** Folio

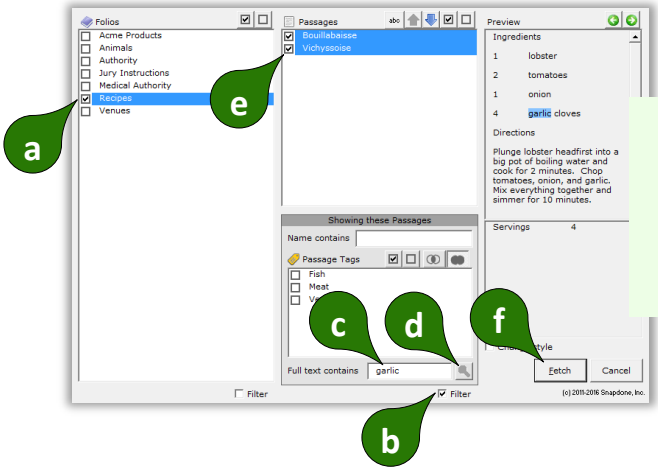
b Click **Filter** to show the search panel

c Type **garlic** in the search box

d Click to search

e Checkmark **Bouillabaisse** and **Vichyssoise**

f Click **Fetch** to insert the recipes in the document



When is clicked, the list of Passages shrinks to show only recipes that contain the word **garlic**.

Answering Fetch Questions from Folios

When answering questions, you will sometimes encounter "fetch" questions. You will recognize them because:

- The answer box has a red border (only if you are using Word 2013 or later).
- The flag above the answer box says **click Fetch to choose**.

To respond to a fetch question, do not type in the answer box; instead, click **Fetch** to select your response in the Fetch screen.

Sources: Data

AwD DoxDB

DB/**AwD** reaches into external data sources to import and make decisions based on the info stored there. After identifying an Excel workbook, Access database, or SQL database as a Data Source, you can use it to inform Smart Answers, Lists, Conditions, and Fields in much the same way you use the Questionnaire, Grids, Master Lists, and Folios. Creating a Data Source is a one-time operation giving *all* of your forms live, real-time access to its info, no matter how frequently it changes.

The Source Material

No matter whether your source material is an Excel workbook, an Access database, or a SQL database, several key concepts apply.

Tables

Access and SQL use the term "table" to describe a two-dimensional grid of information. In Excel, a worksheet is the equivalent of a table. Just as an Access or SQL database may contain many tables, an Excel workbook may contain many worksheets. No matter what the source, be sure your tables have meaningful names, so they'll be easy to recognize. (To rename an Excel worksheet, right-click the worksheet's tab at the bottom of the screen and choose **Rename**.)

Column Labels

DB/**AwD** requires that the first row of each table contains column labels (also known as field names). This is akin to the Label column in the Questionnaire. Column labels cannot contain these special characters: **( ) [ ] . : ; | # < >**

Access and SQL tables always have column labels, but Excel worksheets sometimes do not. If you want to use an unlabeled Excel worksheet as a **DB**/**AwD** Data Source, you'll first need to add a row at the top containing column labels.

column labels ➡

ID	Name	DOB
1	Ann Ames	5/16/1972
2	Bill Blake	8/1/1990
3	Cathy Carson	12/30/1988

⬅ *column labels*

Key Columns

A key column is a super-charger for your data. It contains a unique value to individually identify each row. The first column in a table is often sequentially numbered to serve as a key column. But any column can serve as a key column, even if it contains text instead of numbers, as long as it contains unique non-blank text in each row.

Here the **Name** and **DOB** columns should not be used as keys, because eventually there may be two people with the same name, or two people with the same birthdate. So an **ID** column has been added to serve as a unique key for each row.

ID	Name	DOB
1	Ann Ames	5/16/1972
2	Bill Blake	8/1/1990
3	Cathy Carson	12/30/1988

When a key column exists, all the columns in that table are related. That means (using the above table as an example), when a form user chooses **Ann Ames** in response to a question, the form can automatically fill in not only Ann's name, but also her birthdate and info from any other column in the table (even if additional columns are added later). Key columns also speed up processing and are used to create relationships that span tables (more about relationships on page 161).

Pronoun Columns

If your table includes pronoun columns, they can behave like text-with-pronoun answers in the Questionnaire (page 9). For example, a **Gender** column could give gender info (**M** or **F**) about the person in each row. Then forms that use this Data Source can use Pronoun Fields for the people named in it.

ID	Name	DOB	Gender
1	Ann Ames	5/16/1972	F
2	Bill Blake	8/1/1990	M
3	Cathy Carson	12/30/1988	F

Pronoun columns must use particular words or characters to identify gender so that **DB**/**AwD** can interpret them properly. These are all valid words and characters that may appear in a pronoun column (capitalization does not matter):

he	**she**	**it**	**they**
M	**F**	**N/A**	**Group**
Male	**Female**	**Neuter**	**Plural**

Relationships

Tables are sometimes "related" to each other. That means each row in one table is related to a row in another table. You can give your forms a big boost of intelligence by informing **DB**/**AwD** of any relationships that exist in your data. But first you need to understand what a relationship is. To illustrate, consider these two tables, named **Authors** and **Books**:

ID	Name
1	Herman Melville
2	Agatha Christie
3	Mark Twain

Authors

ID	Title	AuthorID
1	Tom Sawyer	3
2	Moby Dick	1
3	Huckleberry Finn	3

Books

In the **Books** table, we see that *Tom Sawyer* and *Huckleberry Finn* were written by author **3**. Checking the **Authors** table, we see that author **3**'s name is Mark Twain. The two tables are related. The columns that tie them together are the **Books** table's **AuthorID** column and the **Authors** table's **ID** column. Said another way: the **Books** table's **AuthorID** column contains numbers that correspond to numbers in the **Authors** table's **ID** column. That's very wordy and difficult to visualize, so we use this notation to describe the relationship:

Authors.ID <--> Books.AuthorID

*The **Authors** table's **ID** column is related to the **Books** table's **AuthorID** column*

A Data Source may contain many relationships. Here's a database maintained by a library where they use four tables to keep track of (1) authors, (2) the books written by those authors, (3) the people borrowing the books, and (4) the books each person has borrowed.

ID	Name
1	Herman Melville
2	Agatha Christie
3	Mark Twain

Authors

ID	Title	AuthorID
1	Tom Sawyer	3
2	Moby Dick	1
3	Huckleberry Finn	3

Books

ID	Name
1	Ann Ames
2	Bill Benson
3	Carol Carson

Borrowers

BrwrID	BookID
2	2
2	3
1	1

Loans

Relationships: Authors.ID <--> Books.AuthorID
Books.ID <--> Loans.BookID
Borrowers.ID <--> Loans.BrwrID

Let's track a relationship through all four tables. Start in the **Loans** table. The first row of data tells us that borrower **2** has borrowed book **2**. The second row tells us that the same borrower **2** has also borrowed book **3**.

Looking in the **Borrowers** table, we see that borrower **2** is named Bill Benson.

Looking in the **Books** table, we see that book **2** is *Moby Dick* by author **1**, and book **3** is *Huckleberry Finn* by author **3**.

Finally, the **Authors** table tells us that author **1** is Herman Melville, and author **3** is Mark Twain.

Putting it all together: Bill Benson borrowed *Moby Dick* by Herman Melville and *Huckleberry Finn* by Mark Twain. You will do the same sort of trick in forms you create, using relationships between tables to translate dry, arcane data into plain English.

Armed with knowledge of tables, key columns, pronoun columns, and relationships, you're now ready to add a Data Source.

Adding a Data Source

AwD DoxDB

AwD owners get a free pass here, because **AwD** automatically creates Data Sources during the step when you convert a Questionnaire to a webQ (see the Aurora Manual). You might want to skip a few pages and pick up with Data Sources in the Questionnaire on page 167.

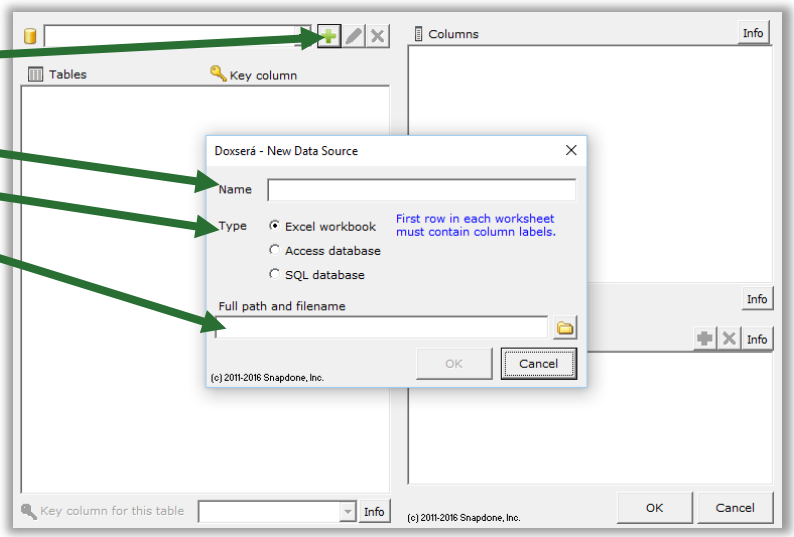
But **DB** owners need to know how to create their own Data Sources. (And the same is true for **AwD** owners who want to use other Data Sources in addition to their **AwD** databases.) Once a Data Source exists, *all* of your forms have access to the data, even if the info changes over time. Click **Sources**, **Data** to open the Data Sources screen.

Click to add a new Data Source, and select an Excel workbook.

Type a name for this Data Source.

Identify the type: **Excel**, **Access**, or **SQL**.

For Excel and Access sources, supply the full path and filename for the Excel workbook file or Access database file. For SQL sources, supply the name of a Windows DSN that uses a Trusted Connection.



SQL and DSNs

A DSN (Data Source Name) is a Windows feature that contains the connection info required to access a particular SQL database: user name, password, and all sorts of parameters that enable your computer to interact with the database. Creating a DSN is a bit of an art form and generally requires an IT professional and/or the support team of the database in question.

The good news is: Once the DSN has been created, all you need to know is the name that has been assigned to it. Just use that name when prompted for the SQL database's DSN name, and you immediately have access to the entire contents of the database.

A note to the person who creates the DSN

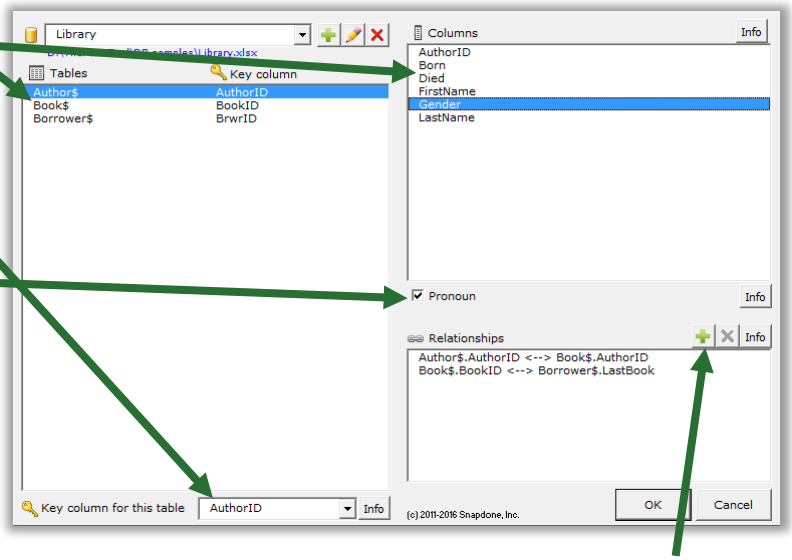
The preferred method is to use a Trusted Connection DSN. Alternately, you may use an Authenticated Windows DSN. In that case, you will type a connection string into DoxDB's Create Data Source screen. The connection string will include the name of the DSN, the user ID, and the password. DoxDB only requires read-only access to the database, so you're welcome to use a non-admin login that only provides read-only access. A sample connection string:

DSN=MyData;User Id=TomJones;Password=p@$$w0rd;

Each table in the Data Source is listed on the left, and columns in the selected table are listed on the right.

Identify key columns by selecting a table then choosing its key column here.

Identify any pronoun columns by selecting a column then checkmarking the **Pronoun** checkbox. If a table contains multiple pronoun columns, you will also need to select the column to which each applies.



If relationships exist among the tables, select one of the related tables and click ✚ to add a relationship. You will be asked to identify the related columns in each of the two tables.

After entering the Data Source's characteristics (key columns, pronoun columns, and relationships), click **OK** to save it. If you later add tables or columns to the source (whether it's an Excel file, Access file, or SQL database), you do not need to return to this screen to make any changes unless you have altered the key columns, pronoun columns, or relationships. You may also return to this screen if you need to delete a Data Source (by clicking the ✕ button) or change its name, path, DSN, or connection string (by clicking the button).

Lesson 31: Add a Data Source

- Data Source (page 159)

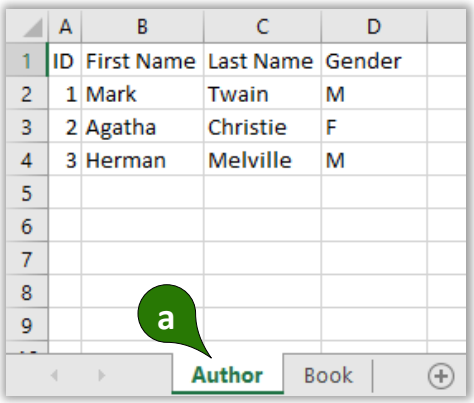
In this lesson, you will save info about books and authors in an Excel workbook, then add a Data Source to make all of that info available to your forms.

1 Create a workbook

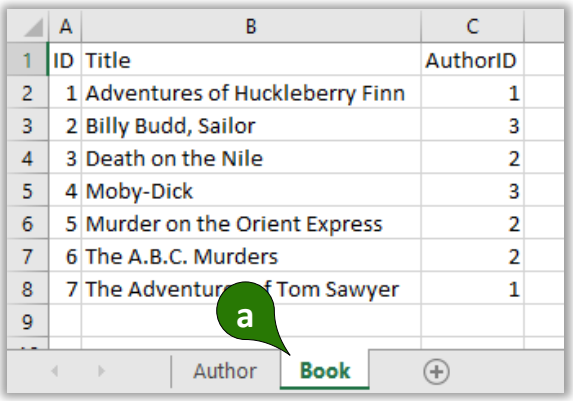
- Use Excel to create a workbook that includes the two spreadsheets shown below.

a Name the two worksheets **Author** and **Book**. (To name a worksheet, right-click its tab at the bottom and choose **Rename**.)

- Save the workbook with the name **Authors and Books**



ID	First Name	Last Name	Gender
1	Mark	Twain	M
2	Agatha	Christie	F
3	Herman	Melville	M



ID	Title	AuthorID
1	Adventures of Huckleberry Finn	1
2	Billy Budd, Sailor	3
3	Death on the Nile	2
4	Moby-Dick	3
5	Murder on the Orient Express	2
6	The A.B.C. Murders	2
7	The Adventur f Tom Sawyer	1

2 Add a Data Source

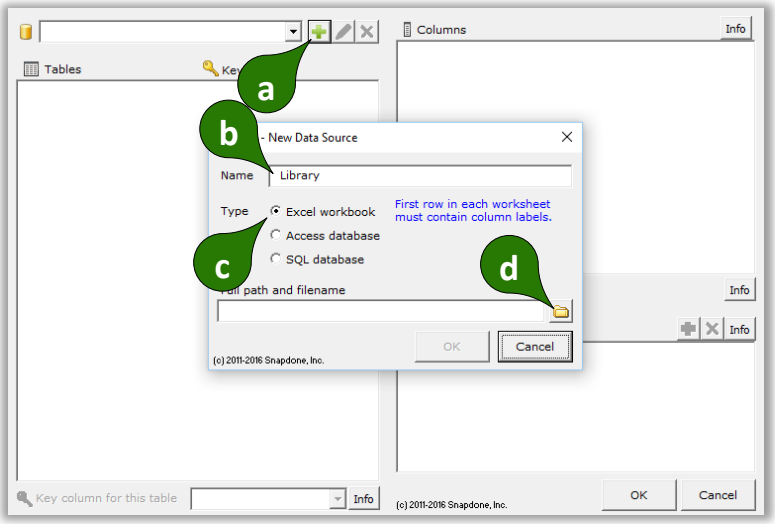
- Back in Word, click **Sources**, **Data** to open the Data Sources screen (you don't need to have a form open)

a Click to add a new Data Source

b Name the Data Source **Library**

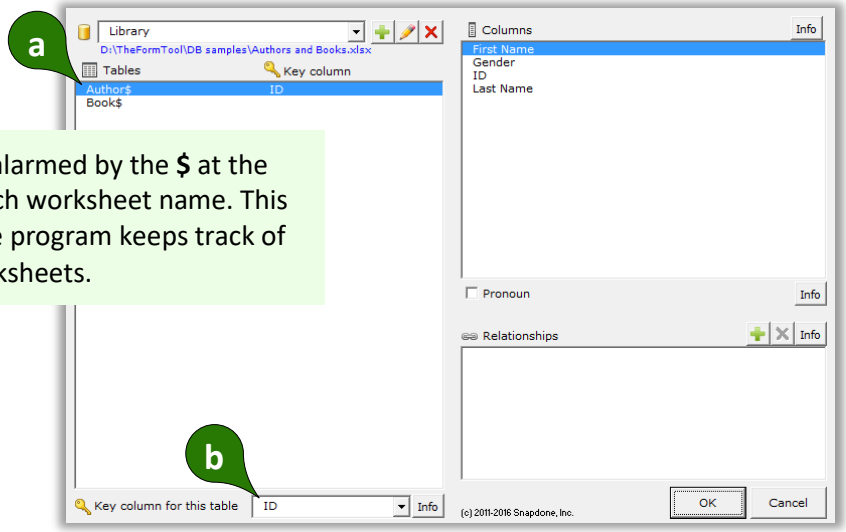
c Select the type **Excel workbook**

d Click to browse to and select the **Authors and Books** workbook you created in Step **1**, then click **OK**



3 Identify key columns

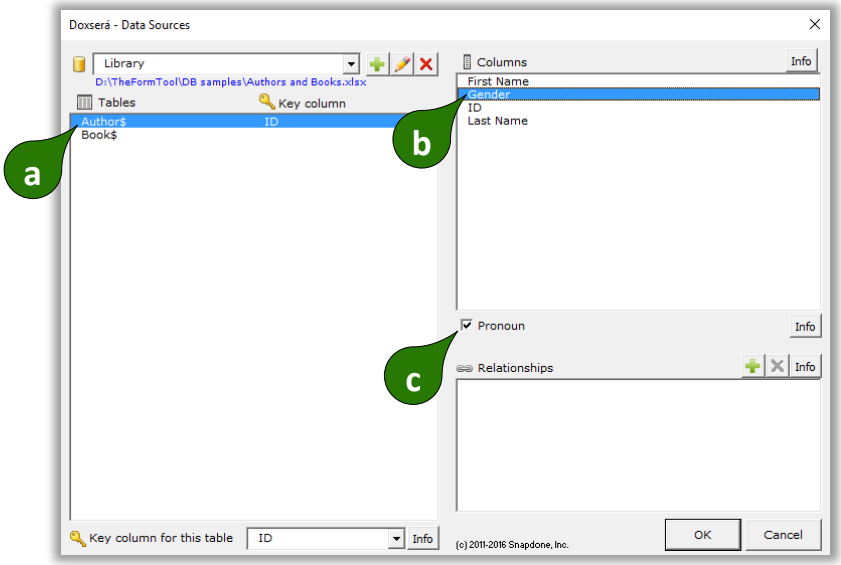
- **a** Select the **Author$** table
- **b** Select the key column **ID**
- Select the **Book$** table and its key column **ID**



Don't be alarmed by the **$** at the end of each worksheet name. This is how the program keeps track of Excel worksheets.

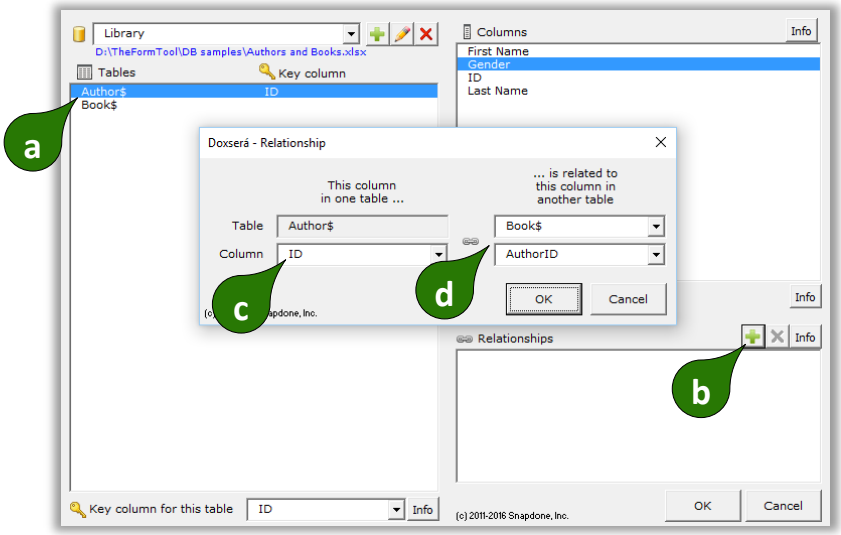
4 Identify any pronoun columns

- **a** Select the **Author$** table
- **b** Select the **Gender** column
- **c** Checkmark the **Pronoun** checkbox



5 Identify any relationships

- **a** Select the **Author$** table
- **b** Click ➕ to add a relationship
- **c** Select the **ID** column in the **Author$** table
- **d** Select the **AuthorID** column in the **Book$** table, then click **OK** twice



This Data Source will be used in Lesson 32 on page 169.

Data Sources in the Questionnaire

You may have already created Dropdown or Checkboxes answers that use other answers, Master Lists, or Folios as their source for choices (pages 9, 13). **DB**/**AwD** adds another option: **Data Source**.

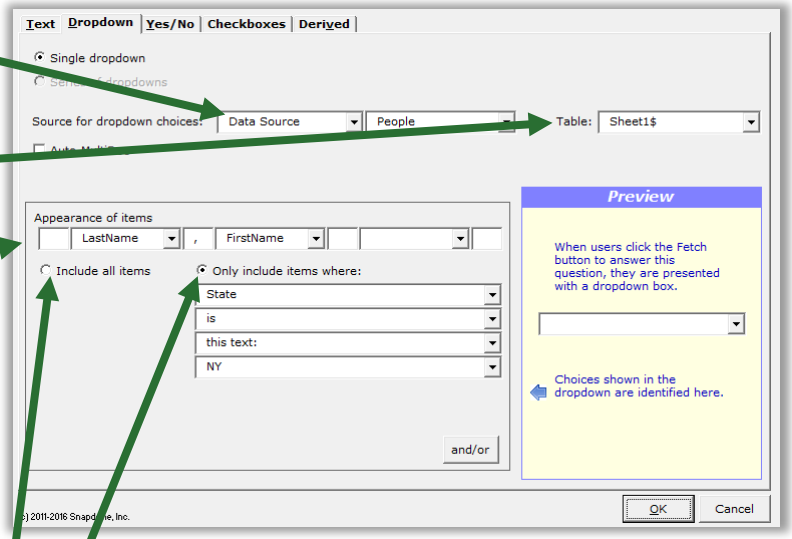
For example, here we're creating a Dropdown answer that draws its choices from a **Data Source** named **People**.

The table we're interested in is named **Sheet1$** (Excel's default).

The table might include many columns (City, State, Zip, Phone, Fax, etc.). Up to three of them (plus surrounding text) can be used as building blocks to assemble the Appearance of our dropdown list of choices. This example uses the **LastName** and **FirstName** columns, separated by a comma that we type right into the Appearance box.

This Appearance results in a dropdown list that looks like this:

Doe, Fred
Jones, Jane
Smith, John



Select **Include all items** to allow the form user to choose any row in the table, or **Only include items where** to restrict them to certain rows. In this example, the form user will only be allowed to select people who live in New York (**State is this text: NY**).

Data Sources in Fields, Lists and Conditions

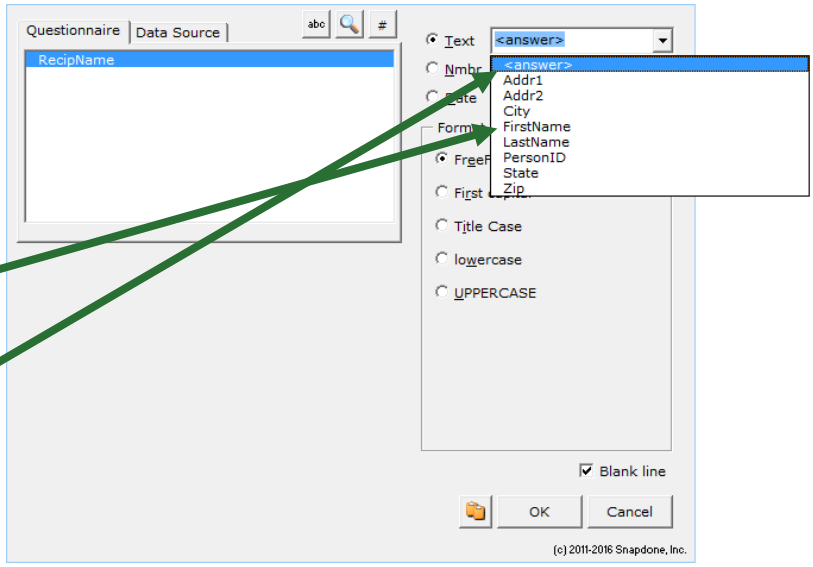
Via the Questionnaire

When creating Fields and Conditions based on Dropdown and Checkboxes answers that use a Data Source for their choices, you have access not only to the selected answer, but also to all of the columns in all of the tables that are linked to that answer.

For example, here we're creating a Field based on a **RecipName** answer that draws its choices from a Data Source. (It's the answer we created in the previous illustration.)

The Field can retrieve info from any column in the Data Source table: **Addr1**, **Addr2**, **City**, **State**, etc.

Select the **<answer>** choice at the top of the list if you want to ignore the contents of the Data Source and instead use the exact contents of the response in the Questionnaire.



For example, in the answer illustrated above, the answer's Appearance was **LastName, FirstName**, so selecting **<answer>** here would create a Field that results in something like **Smith, John** or **Jones, Jane** in the finished document.

Directly from the Data Source

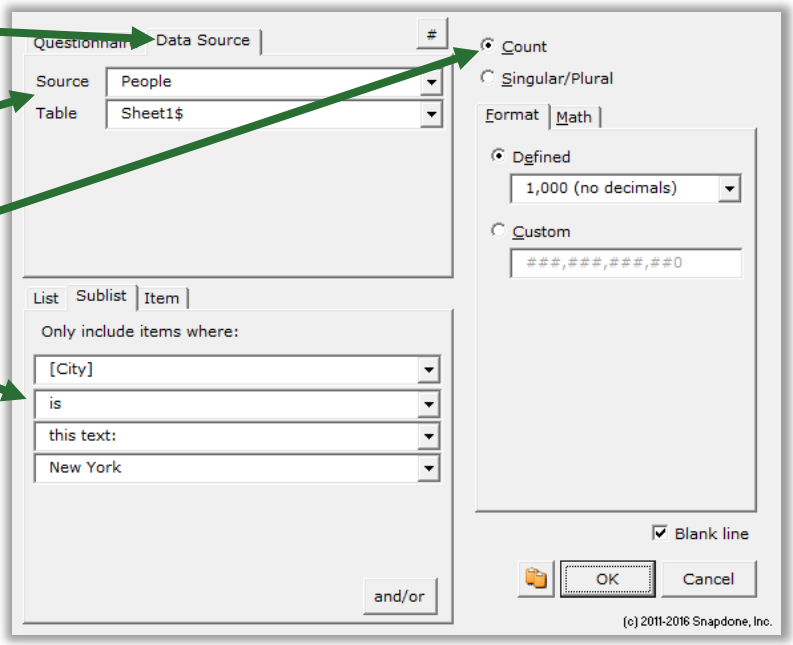
You can also create Fields, Lists, and Conditions that pull info directly from a Data Source, without any reference to the Questionnaire at all. The Field screen is shown below, but the same is true for Lists and Conditions.

Click **Data Source** for direct access to your Data Sources.

Here we've chosen to look at the **Sheet1$** table in the **People** Data Source.

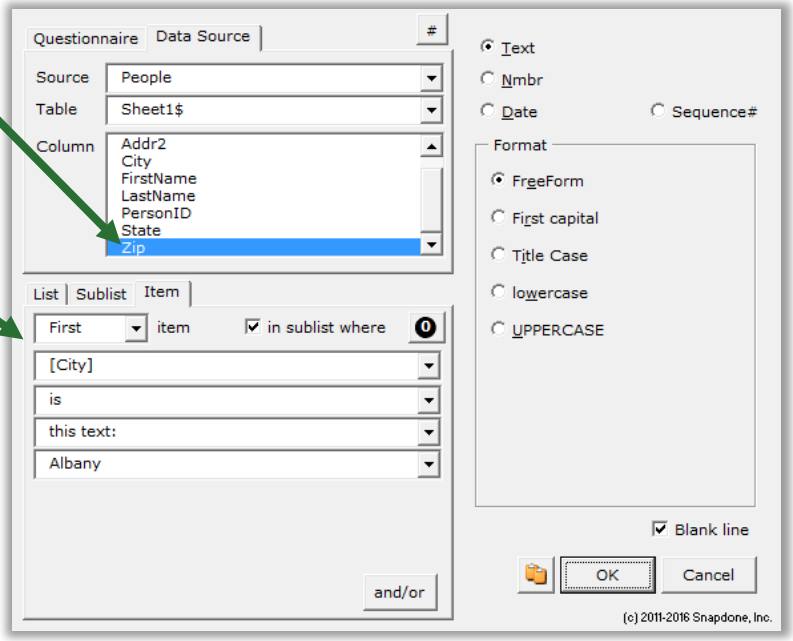
We're creating a **Count** field that will insert a number in the finished document.

The Field will count up the number of people in the **People.Sheet1$** table who live in New York by finding all the rows that have **New York** in the **[City]** column.



This Text Field looks in the same table to retrieve a Zip code.

When the form is Filled, this Field retrieves the Zip code of the first person it finds who lives in Albany (**First item in sublist where [City] is this text: Albany**).



Lesson 32 Lesson 32 Lesson 32

Lesson 32: Use a Data Source in a Form

- Data Source (page 159)
- Dropdown answer (page 9)
- Compound Condition (page 38)
- Sublist (page 67)

In this lesson, you will create a form that pulls info from a Data Source -- some directly, and some via answers in the Questionnaire

Prerequisites:

- "Library" Data Source from Lesson 31 on page 164

1 Create the Questionnaire

a Type or copy/paste this sentence into a blank document

- Click **Questionnaire**, **Create** to add a Questionnaire

b Fill in the Questionnaire as shown

c Place the cursor in the **AuthorName** answer box and click **Smart Answer** to open the Smart Answer screen

The book ___ was written by ___. He/she also wrote _____.

a

b

c

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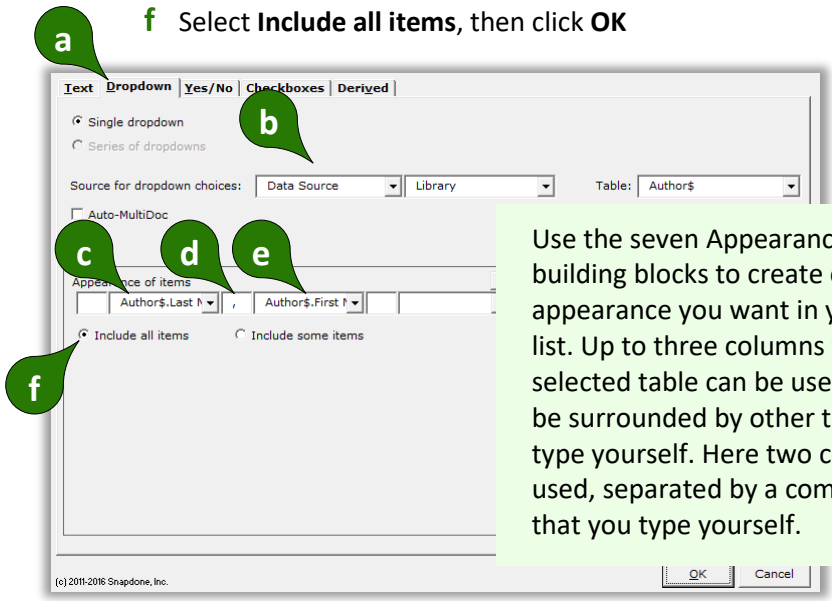
Label	Question	Answer
AuthorName	Choose an author	
BookName	Choose a book by that author	

2 A Smart Answer that shows all authors

- **a** Click **Dropdown**
- **b** Select **Data Source**, **Library**, **Author$** as the source for dropdown choices
- **c** Select **Author$.Last Name** as the first part of the Appearance
- **d** Type a comma followed by a space for the second part of the Appearance
- **e** Select **Author$.First Name** as the third part of the Appearance
- **f** Select **Include all items**, then click **OK**



Use the seven Appearance boxes as building blocks to create exactly the appearance you want in your dropdown list. Up to three columns from the selected table can be used, and they can be surrounded by other text that you type yourself. Here two columns are used, separated by a comma and space that you type yourself.

3 A Smart Answer that shows <u>some</u> books

a Place the cursor in the **BookName** answer box and click **Smart Answer** to open the Smart Answer screen

b Click **Dropdown**

c Select **Data Source**, **Library**, **Book$** as the source for dropdown choices

d Select **Book$.Title** as the Appearance

e Choose to **Only include items where: Book$.AuthorID is this text: {AuthorName} Author$.ID**, then click **OK**

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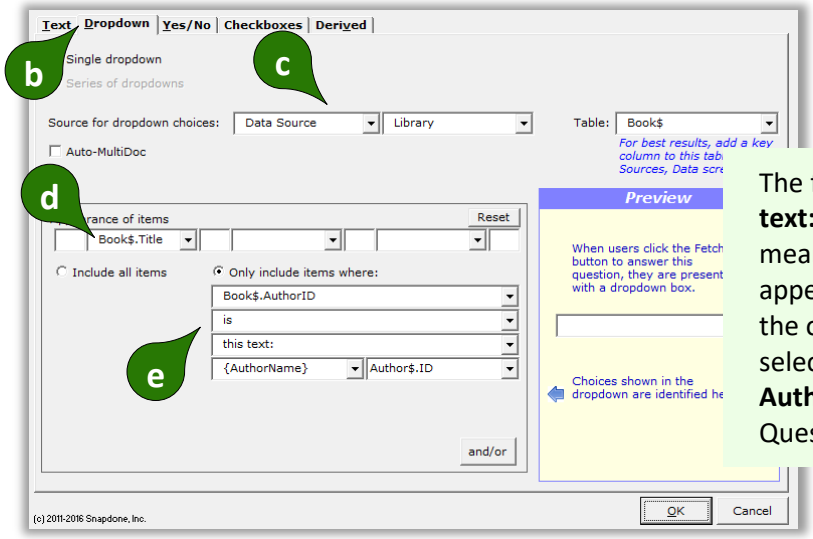
Label	**Question**	**Answer**
AuthorName	Choose an author	a ??]
BookName	Choose a book by that author	



The filter **Book$.AuthorID is this text: {AuthorName} Author$.ID** means only *some* books will appear in the dropdown -- only the ones by the author who was selected in response to the **AuthorName** question in the Questionnaire.

4 Add Fields

- **a** Select the first blank and click **Field** to open the Field screen
- **b** Select the **BookName** answer
- **c** Note that **<answer>** is selected, then click **OK**
- **d** Select the next blank and click **Field**
- **e** Select the **AuthorName** answer
- **f** Select the **Author.FirstName** column, then click **OK**
- **g** Add a space after the **{AuthorName:FirstName}** Field, position the cursor before the period, and click **Field**
- **h** Select the **AuthorName** answer
- **i** Select the **Author.LastName** column, then click **OK**
- **j** Select **He/she** and click **Field**
- **k** Select the **AuthorName** answer
- **l** Select the **Pronoun** type
- **m** Note that format **He|She|It|They**, **Title Case** is selected, and click **OK**

a

The book ___ was written by ___.
He/she also wrote _____.

d

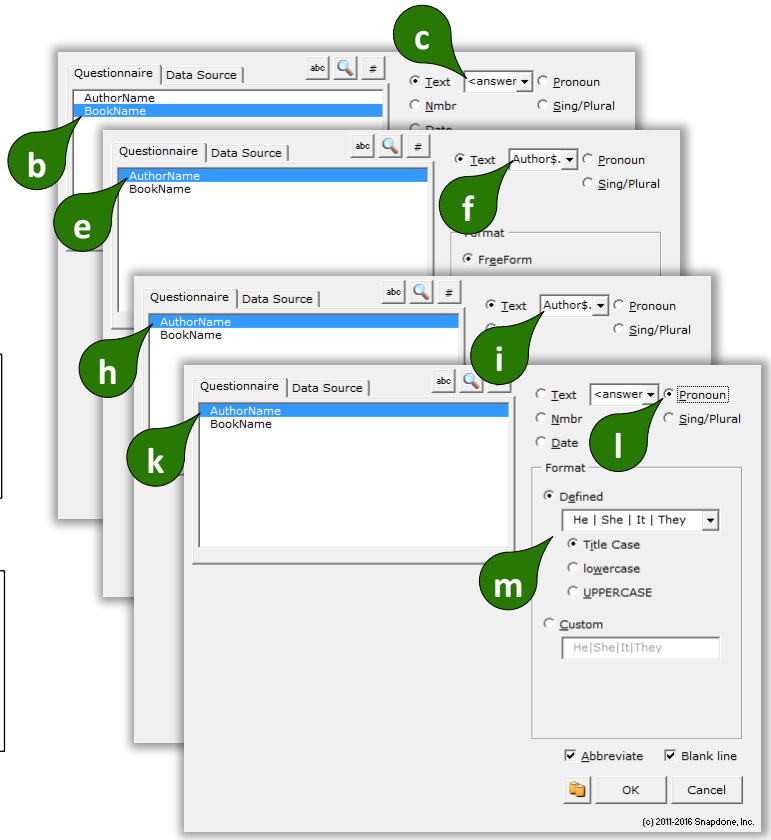
The book {BookName} was written by ___. He/she also wrote

g

The book {BookName} was written by {AuthorName:FirstName}.
He/she also wrote _____.

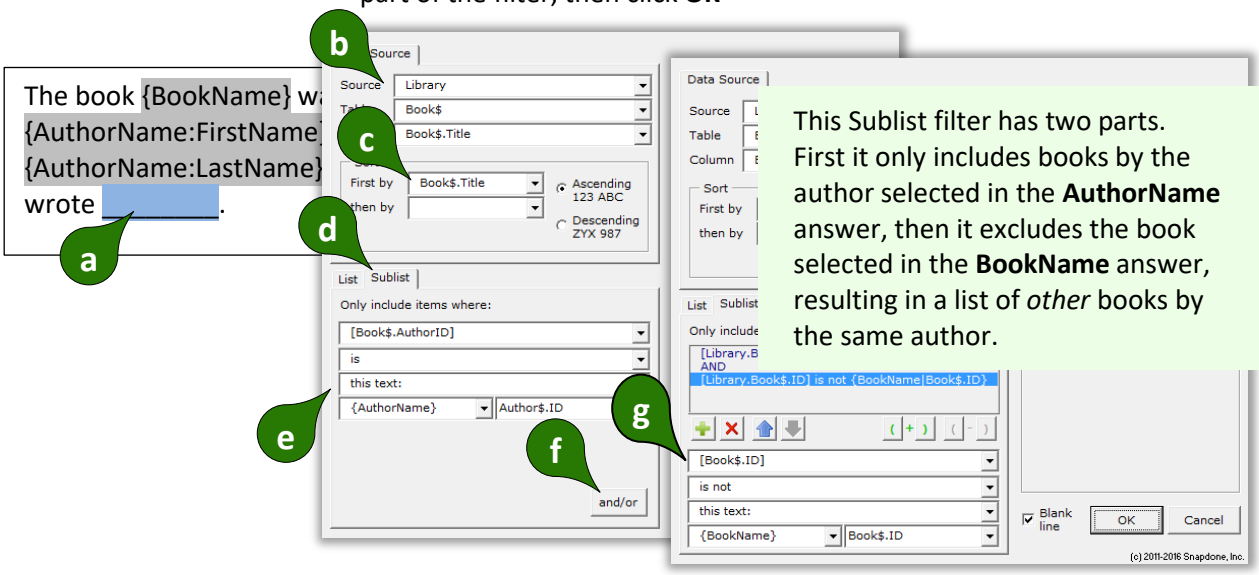
j

The book {BookName} was written by {AuthorName:FirstName} {AuthorName:LastName}. He/she also wrote _____.



5 Add a List

- **a** Select the remaining blank and click **List** to open the List screen
- **b** Select the **Library** source, **Book$** table, and **Book$.Title** column
- **c** Choose the sort order **Book$.Title**, **Ascending**
- **d** Click **Sublist** to filter the List so only *some* items in the table will be included in the finished document
- **e** Choose to only include items where **[Book$.AuthorID] is this text: {AuthorName} Author$.ID**
- **f** Click **and/or** to add a second part to the sublist filter
- **g** Choose **[Book$.ID] is not this text: {BookName} Book.ID** for the second part of the filter, then click **OK**



This Sublist filter has two parts. First it only includes books by the author selected in the **AuthorName** answer, then it excludes the book selected in the **BookName** answer, resulting in a list of *other* books by the same author.

THE PAYOFF

The answer to the first question is used as a filter to reduce the number of choices when answering the second question. This is a great technique to keep things manageable even when your Data Source contains unwieldy amounts of info.

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Label	Question	Answer
AuthorName	Choose an author	Christie, Agatha
BookName	Choose a book by that author	Death on the Nile

The book Death on the Nile was written by Agatha Christie. She also wrote Murder on the Orient Express and The A.B.C. Murders.

Reporting

AwD DoxDB

In the parlance of database enthusiasts, pulling information from a database into a document is sometimes called "Reporting." **DB**/**AwD** includes two reporting commands to quickly pull lots of data (or information *about* lots of data) into a form.

Data Tables

Authors

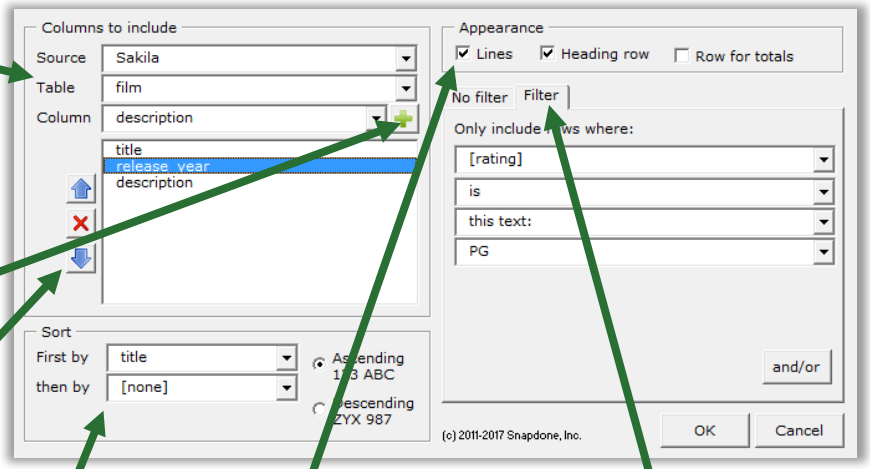
When large amounts of unmodified tabular data need to be pulled from a Data Source into a form, use a Data Table for extra-speedy results. Data Tables sacrifice formatting flexibility and decision-making in exchange for blazing speed when vast amounts of data need to be inserted quickly. For example, you might need to pull several selected columns and hundreds (or even thousands) of rows filtered with particular criteria from an Excel spreadsheet. A Data Table would accomplish this very rapidly, but would not allow reformatting or decision-making based on the retrieved information. Think of a Data Table as a pure "data dump" where you can choose what information to dump, but you don't have a whole lot of control over how it's presented. (If you need to manipulate or analyze the retrieved information, use a List instead (page 49) -- it's a lot slower, but way more flexible.)

To insert a Data Table in a form, click **Report**, **Data Table** to open the Data Table screen.

Select columns to be included in the Data Table. You may only include columns that are *related* to each other (they either appear in the same Table or in Tables that are related via Key Columns -- see page 161).

Click the green to add a column to the list of included columns.

Use the blue arrows to rearrange the columns. The top column in this list is left-most in the resulting table, and remaining columns follow from left to right. To remove a column from the list, select it and click the red .



The Data Table can be sorted on any of the selected columns, either ascending or descending.

Control the appearance of the Data Table by choosing whether to include border lines, a row at the top for headings, and/or a row at the bottom for totals or other information.

Choose **No filter** to include all rows in the Data Source, or **Filter** to only include certain rows. In the example pictured here, the filter **[rating] is this text: PG** only includes films that are rated PG.

When you click OK, a DataTable structure is inserted in the form. Depending on the choices you made above, it will look more-or-less like this:

Heading1	Heading2	Heading3
{DataTable}title	release_year	description

This row appears if you selected ☒ **Heading Row**

The DataTable row always appears

This row appears if you selected ☒ **Row for Totals**

Modify the **heading row** however you wish. You may include anything you like (text, formatting, images, Fields, Conditions, etc.), just as in any other part of your form.

DO NOT modify the contents **DataTable row**. When the form is Filled, this row will be repeated as many times as necessary, depending on how many rows of info are pulled from the Data Source.

Modify the **row for totals** however you wish. You may include anything you like (text, formatting, images, Fields, Conditions, etc.), just as in any other part of your form. This row is often used to show column totals with **Sum** Data Functions, but you can use it for any purpose.

Data Functions

Authors

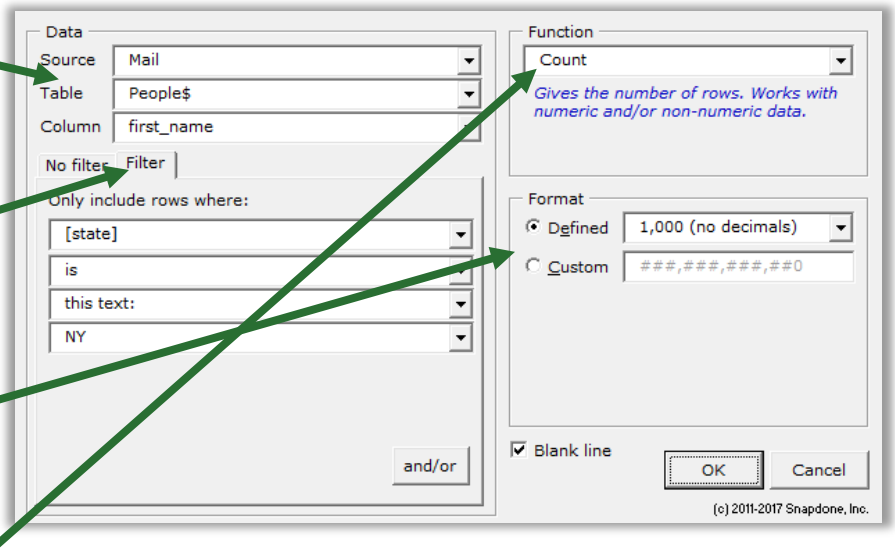
Data Functions are used to determine information *about* data contained in a Data Source, without actually retrieving the data. For example, the **Count** Data Function could determine how many people are on a mailing list without taking the time to retrieve all their names into a document.

To insert a Data Function in a form, click **Report**, **Data Function** to open the Data Function screen.

Select the column to be examined by the Data Function.

Choose **No filter** to include all rows in the column, or **Filter** to only include certain rows. In the example pictured here, the filter **[state] is this text: NY** will only count people who live in New York.

Choose a format for the number that will be inserted in the finished document (page 16).



Select one of the five Data Functions:

Average adds together all the numbers in the selected rows in the selected column, then divides that sum by the number of selected rows.

Count gives the number of selected rows.

Maximum gives the largest number that exists in any of the selected rows in the selected column. If no numbers exist, it gives zero.

Minimum gives the smallest number that exists in any of the selected rows in the selected column. If no number exists, it gives zero.

Sum adds together all the numbers in the selected rows in the selected column.

AwD

Lesson 33: An Aurora Report

- Data Table (page 174)
- Data Function (page 175)

In this lesson, you will create a report form to compiles info that has been gathered from multiple data providers in an **AwD** database via a webQ.

Prerequisites:

- Complete the exercise contained in *Your First Aurora webQ and Form* packaged in your **AwD** download alongside this Expert Guide.

1 Create the Questionnaire

a Type or copy/paste the body of the form shown below

b Click **Questionnaire**, **Create** to add a Questionnaire

Hamster Age Brackets:

Junior (under 2 years old): ___

Senior (2 years and older): ___

a

Registrants:

b

Label	Question	Answer

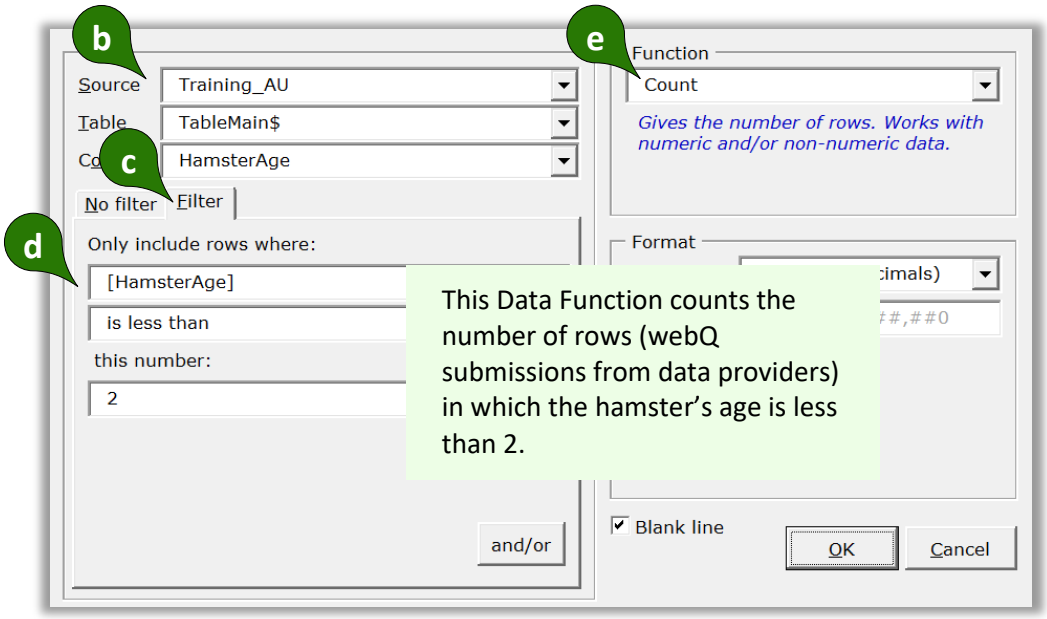
This Questionnaire is empty because the form pulls all necessary info directly from a Data Source without requiring any additional info from the form user. Other forms might use a combination of sources, but this form only has one source.

2 Data Functions

- **a** Select the first blank line and click **Report**, **Data Function** to open the Data Function screen
- **b** Select the source **Training_AU**, table **TableMain$**, and column **HamsterAge**
- **c** Click the **Filter** tab
- **d** Only include rows where **[HamsterAge] is less than 2**
- **e** Select the **Count** function, then click **OK**
- Select the second blank and repeat the above, but in step **d** only include rows where **[HamsterAge] is more than 1**

Hamster Age Brackets:
Junior (under 2 years old): ___
Senior (2 years and older): ___

Registrants:



This Data Function counts the number of rows (webQ submissions from data providers) in which the hamster's age is less than 2.

3 Data Table

a Place the cursor in a blank line under **Registrants** and click **Report**, **Data Table** to open the Data Table screen.

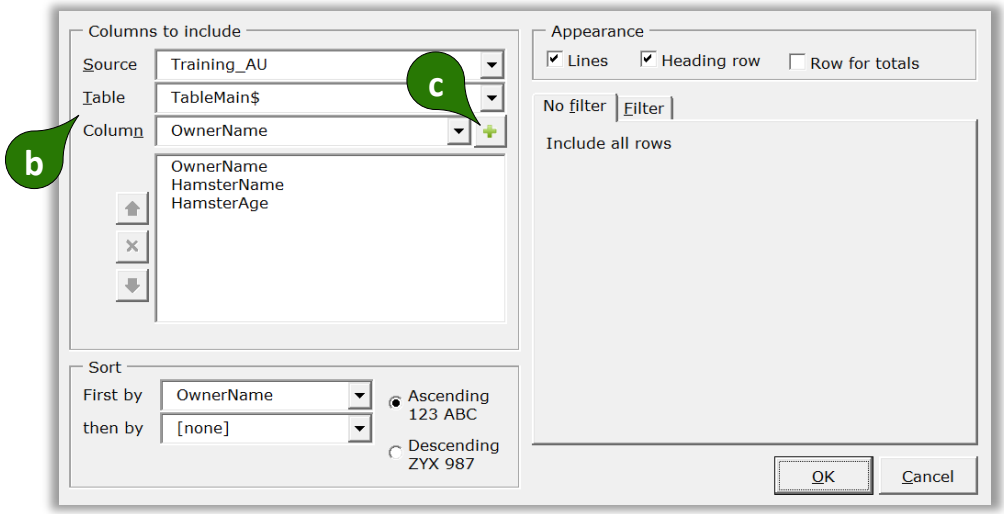
b Select the source **Training_AU**, table **TableMain$**, and column **OwnerName**

c Click to add the OwnerName column to the table, then add two more columns: select column **HamsterName** and click , then select column **HamsterAge** and click , then click **OK**

d Replace **Heading1** with **Name of Owner**, **Heading2** with **Name of Hamster**, and **Heading3** with **Age of Hamster**

Hamster Age Brackets:
Junior (under 2 years old): {fx}
Senior (2 years and older): {fx}

a Registrants:



Hamster Age Brackets:
Junior (under 2 years old): {fx}
Senior (2 years and older): {fx}

d Registrants:

Heading1	Heading2	Heading3
{DataTable}OwnerName	HamsterName	HamsterAge

Lesson 33 Lesson 33 Lesson 33

AwD

THE PAYOFF

When this form is Filled, it pulls together info provided by multiple data providers via an Aurora webQ.

Hamster Age Brackets:
Junior (under 2 years old): 2
Senior (2 years and older): 3

Registrants:

Name of Owner	Name of Hamster	Age of Hamster
Betty Cooper	Cheeky	3
Fred Olsen	Romp	2
Gary Phelps	Bingo	4
Jane Doe	Puff	1
John Smith	Fluffy	0

Lesson 33 Lesson 33 Lesson 33

Volume, Volume, Volume (MultiDoc and Auto-MultiDoc)

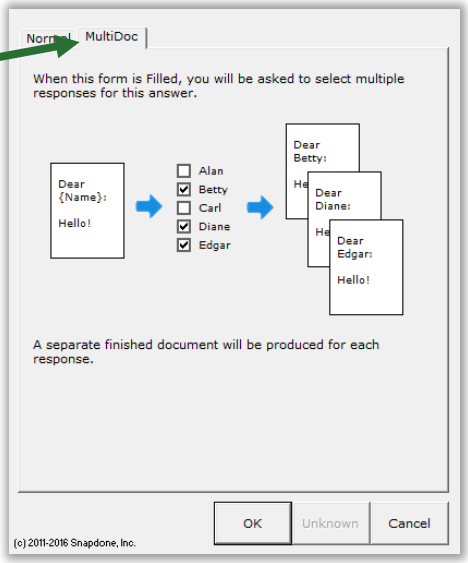
AwD DoxDB

DB/**AwD** can produce hundreds or even thousands of finished documents in a single operation, each one individually customized with an unlimited array of Fields, Lists, and Conditions. (Think mail merge on steroids.) Form *users* may choose to produce multiple finished documents with **MultiDoc**, and form *authors* may choose to enforce this process with **Auto-MultiDoc**.

MultiDoc for Form Users

Users

When responding to a Dropdown answer that uses a Data Source for its choices (like the one shown on page 167), click **MultiDoc** to create a whole batch of finished documents. Then click **OK** and answer any remaining questions in the Questionnaire before clicking **Fill**.



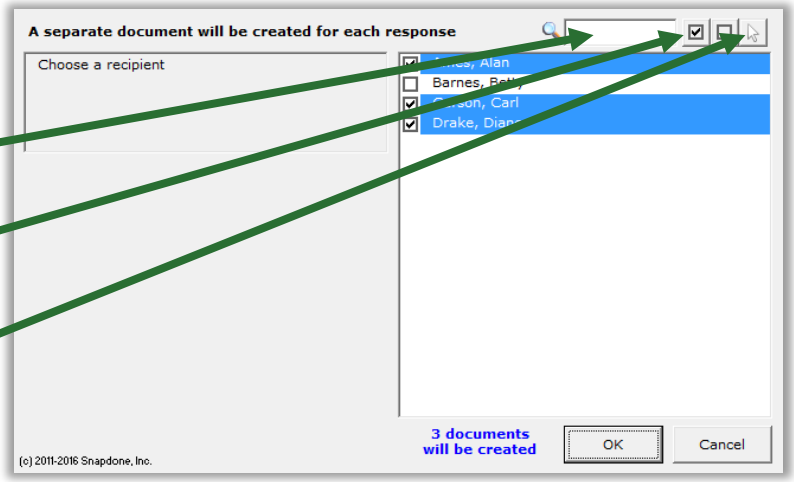
When the form is Filled, this screen appears. A separate finished document will be created for each item selected.

Type a word in the search box to find items that contain that word.

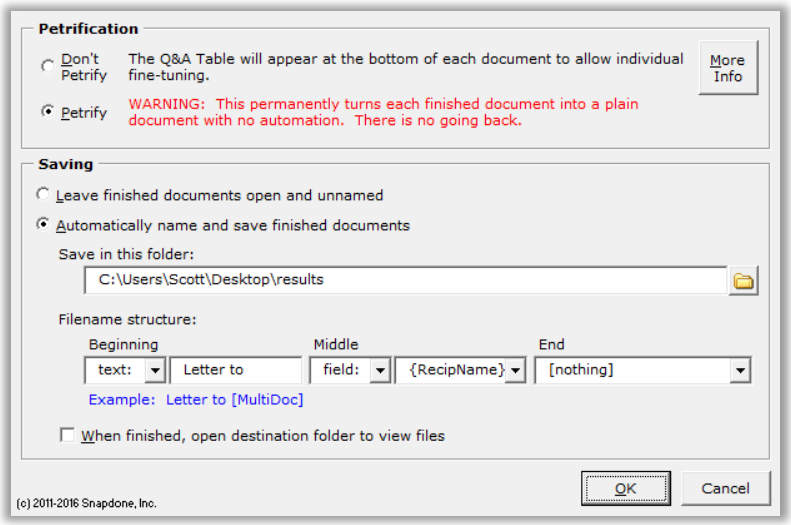
Click ☑ to select all items or ☐ to select none.

Click to change the selection mode. Then you can use **click** to select a single item, **Ctrl+click** to select additional items, and **Shift+click** to select a range of items.

When finished selecting items, click **OK**.



Use this screen to choose where and how the finished documents will be saved. See page 191 for a full description of these options.



Auto-MultiDoc for Form Authors

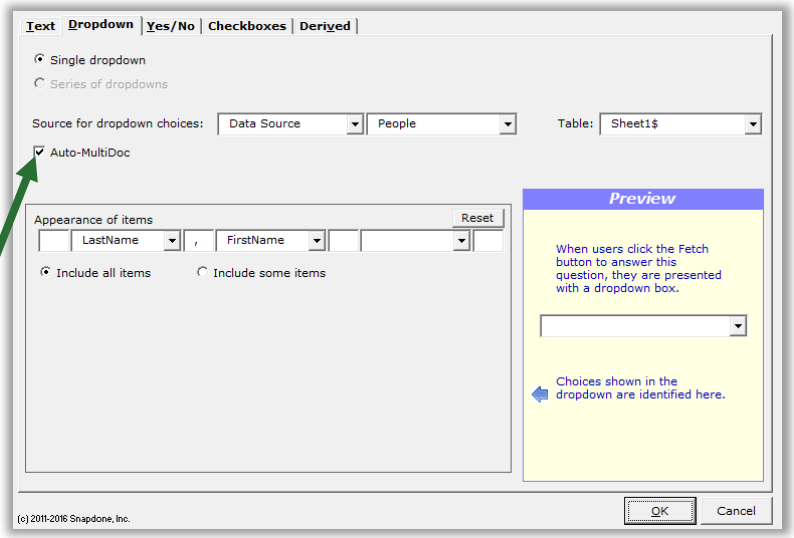
Authors

The form author may want a particular Dropdown answer to *always* behave as a MultiDoc answer. This is a good practice in forms that are frequently used to create a whole batch of finished documents, because it allows form users to skip the step described above where they need to respond to the question and click **MultiDoc**.

To make the MultiDoc feature automatic for a form, it must first contain a Dropdown answer that uses a Data Source for its choices. (See Data Sources in the Questionnaire on page 167.)

Put the cursor in that answer box and click **Smart Answer** to open the Smart Answer screen.

Checkmark the **Auto-MultiDoc** checkbox and click **OK**.



Like Derived answers, Auto-MultiDoc answers work automatically in the background, so they should be hidden from form users to avoid confusion. When the form is complete and ready to be saved, click **Row/Column**, **Show/Hide** to hide the Auto-MultiDoc answer. If you need to revise the form later, click the same button again to make everything visible.

Sources: Outlook Contacts

AwD DoxDB

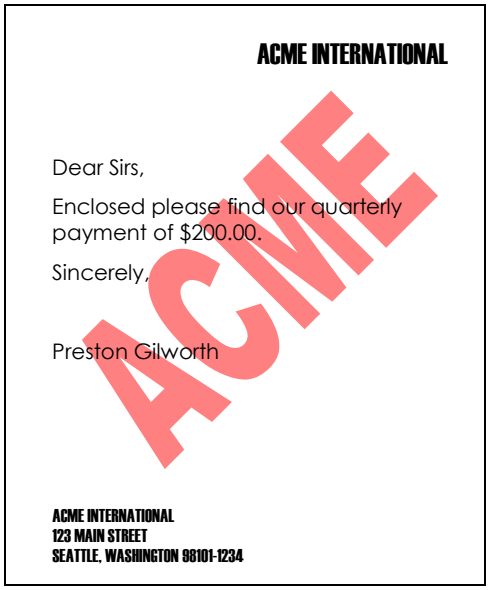
Outlook contacts can also be used as a data source, very much like Excel, Access and SQL described in the preceding section. But each form user has a potentially unique collection and arrangement of Outlook contact data. Alan might store private contacts locally in a single folder; Betty might store shared contacts on a network in multiple folders; Carl might store contacts online in the cloud; and Diane might use a combination of all three. That flexible nature of Outlook contact storage means a few different rules apply:

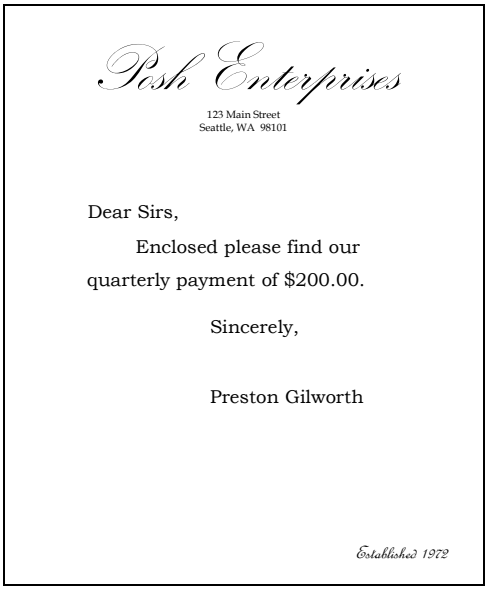
- **Always Available.** There is no need to add a data source in the Data Sources screen (as shown for Excel, Access and SQL on page 162). Outlook contacts are always available as a data source when authoring forms.
- **In the Questionnaire.** When choosing a source for dropdown answers or checkboxes answers (as shown for Excel, Access and SQL on page 167), select **Outlook Contacts** instead of **Data Source**.
- **No Direct Access.** Outlook contact info can only be accessed via answers in the Questionnaire, not directly via the **Data Source** tab (as shown for Excel, Access and SQL on page 168).

Apart from those three differences, Outlook contacts work the same as Excel, Access, and SQL, described in the preceding section, beginning on page .

Sources: Wrappers

Wrappers change the overall *appearance* of a finished document without changing the *content*. Use Wrappers to produce the same content with a variety of "looks."





In the two letters above, the content is identical ("Dear Sirs, Enclosed please find…"), but Wrappers have dramatically changed the appearance (fonts, margins, headings, indents, spacing, headers, footers, watermarks, styles, etc.). Wrappers turn a single form into a chameleon that can instantly rebrand itself to serve multiple affiliates, subsidiaries, jurisdictions, or marketing channels. And Wrappers can automatically apply your own corporate identity to generic forms supplied by form publishers and other external sources.

Creating Wrappers

Authors

1. Get the Right "Look"

First open a document that has the right "look." If headers and footers are part of the look, be sure to check both first- and second-page headers and footers (and odd/even headers and footers if applicable). Page formatting is also important – margins, paper size and orientation.

Pay close attention to the Styles contained in the document. (In fact, this might be a good time to brush up on your Microsoft Word Style skills, if you're not already familiar with that feature.) The **Normal** Style, in particular, controls the appearance of much of the document, and the **Body Text** Style is often employed to determine default paragraph formatting. Heading Styles (**Heading 1** through **Heading 9**) are excellent tools to customize the appearance of a document, and can include automatic numbering. If this Wrapper will be applied to documents that contain footnotes, endnotes, tables of contents, tables of authority, or indexes, then be sure those Styles are all formatted as desired (**Footnote Text**, **Endnote Text**, **TOC 1** through **TOC 9**, **TOA Heading**, and **Index 1** through **Index 9**).

More generally speaking, be aware that when a Wrapper is applied to a form, every Style used in the form will be converted to that Style's appearance in the Wrapper. That's great, because it gives you enormous freedom and flexibility to dramatically alter document appearance; but it does mean you must be vigilant about the format of Styles in Wrappers and the way Styles are applied in forms that use Wrappers.

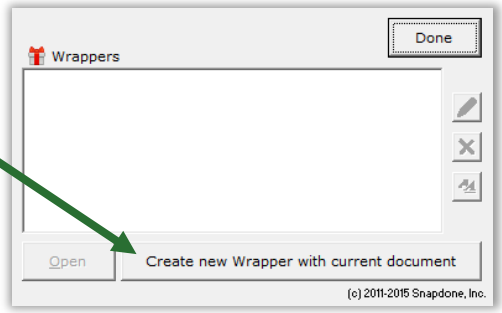
2. Remove Content and Save-As

Once the page format, headers, footers, and Styles are correct, delete all the text in the body of the document. Remember: We are creating a Wrapper for content that will supplied by a form; the Wrapper itself does not contain any content (except what's contained in the headers and footers).

Save the empty model document (be sure to use the **Save-As** command if you don't want to overwrite the document you started with).

3. Create and Name the Wrapper

With the saved model document open on your screen, click **Sources**, **Wrappers**, **Create new Wrapper with current document**. You will be prompted to type a name for the new Wrapper.



Adding Wrappers to Forms

Authors

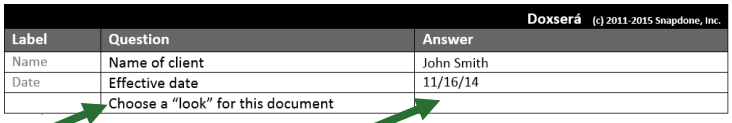
Ask the User to Choose a Wrapper

As a form author, you may want to allow the form user to choose a Wrapper. For example, if we had created two Wrappers named **Acme** and **Posh**, we could ask the form user to choose one of them to create a finished document branded with either look.

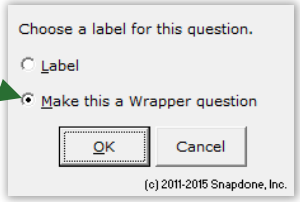
To create a Wrapper question, add a new row wherever desired in the Questionnaire (click **Row/Column**, **Add**).

Type a question in the Question column, but leave the Label column blank. (The label will be provided automatically in the next step.)

Put the cursor in the new row's answer box.

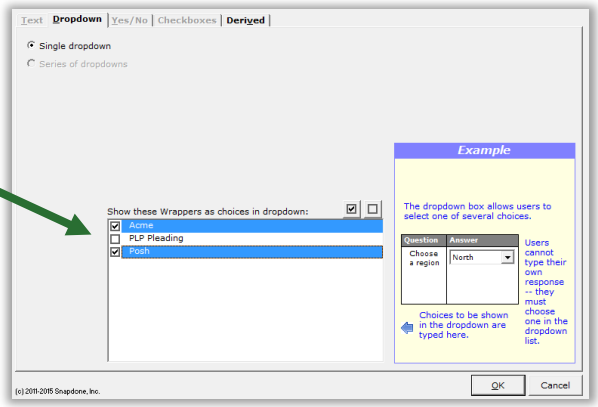


Click **Smart Answer**, select **Make this a Wrapper question**, and click **OK**.



Select the Wrappers that should appear as choices for the user (in this example, **Acme** and **Posh**).

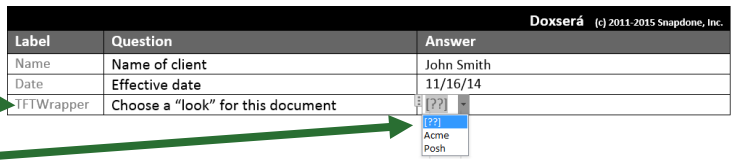
Click **OK**.



Two things happened:

(1) The label **TFTWrapper** was added.

(2) The selected Wrappers appear as choices in a dropdown answer.



When this form is used and the form user selects **Acme** or **Posh**, the corresponding Wrapper will be applied during the **Fill** step, instantly transforming the appearance of the finished document. At a later date, if a different appearance is needed, the user can select a different Wrapper and click **Fill** again.

Automatically Apply a Particular Wrapper

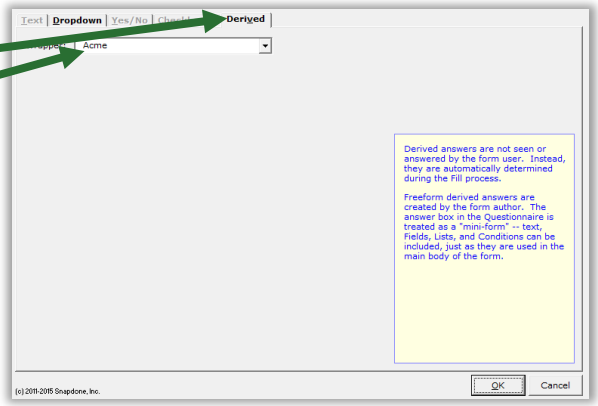
Sometimes the form author wants to apply a particular Wrapper to a particular form each and every time the form is used. Since no input is required from the form user, this is best handled with a Derived answer.

The steps are the same as above, except in the Smart Answer screen:

Click **Derived**.

Select the Wrapper to be applied.

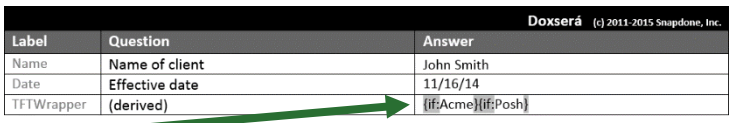
Click **OK**.



Automatically Decide Which Wrapper to Apply

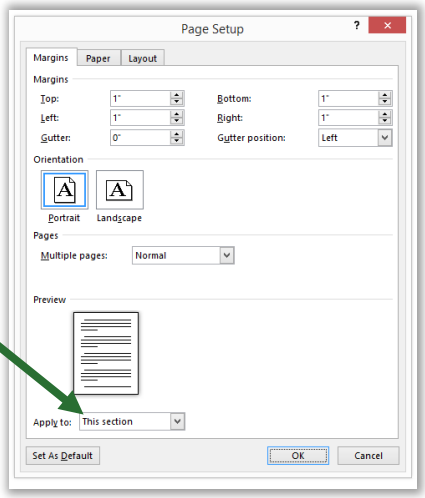
As a variation of the above, the form author could add Conditions within a freeform Derived answer so that the correct Wrapper is automatically selected, depending on responses to other questions in the questionnaire.

In this form two Conditions have been created, so that the Acme Wrapper will be applied in some circumstances, and the Posh Wrapper will be applied in others.



Wrappers and Section Breaks

If your form contains section breaks (accessed in Word's **Page Layout**, **Breaks** menu), be aware that some Wrapper formatting will only be applied to the *last section* in the finished document. This is because formatting stored in preceding section breaks takes precedence over formatting stored in the Wrapper. This has no impact on Styles, but does affect headers, footers, and Page Setup settings that are applied to **This section**.



In this situation, if you require headers and footers to change throughout the form instead of just in the last section, you could (1) eliminate the section breaks; (2) split the form into separate forms; or (3) save alternate headers and footers as Folio Passages and use Fetcher codes to fetch them when and where needed.

Form Sets

Think of a Form Set as a collection of pointers (or "shortcuts," in Windows terms). Each pointer aims at a form that exists somewhere on your computer or network. When a Form Set is used, the target forms are retrieved from their various locations for simultaneous processing.

Use Form Sets to organize forms into groups that fit your needs. For example, suppose you're a car dealer and you need to complete these three forms every time you sell a car:

Proof of Sale

This document proves that {Buyer} is the legal owner of a {Model} automobile, VIN #{VIN}, purchased on {Date}.

_____

{Seller}

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Buyer	Name of buyer?	
Seller	Name of seller?	
Model	Model of car?	
VIN	VIN # of car?	
Date	Date of sale?	

Emissions Certificate

On {Date}, the automobile with VIN No. {VIN} passed its emissions test with a carbon monoxide rating of {Rating}.

_____

{Seller}

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Date	Date of sale?	
VIN	VIN # of car?	
Rating	Carbon monoxide rating?	
Seller	Name of seller?	

License Application

{Buyer} hereby applies to the Department of Transportation for a vehicle license.

Vehicle Model: {Model}
Vehicle Color: {Color}
VIN No.: {VIN}

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Buyer	Name of buyer?	
Model	Model of car?	
Color	Color of car?	
VIN	VIN # of car?	

Rather than fill out each form separately, **Dox**/**DB**/**AwD** allows you to create a Form Set so the whole batch of documents can be completed in one go. Note that the three Questionnaires vary from each other but have several fields in common. When the Form Set is used, **Dox**/**DB**/**AwD** builds a compiled Questionnaire that

includes all relevant questions for the selected forms and no duplicates, so the form user can work with one Questionnaire instead of three:

FORM SET

C:\My Forms\Emissions Certificate.dotx

C:\My Forms\License Application.dotx

C:\My Forms\Proof of Sale.dotx

Doxserá (c) 2011-2013 Snapdone, Inc.

Label	Question	Answer
Date	Date of sale?	[??]
VIN	VIN number of car?	[??]
Rating	Carbon monoxide rating?	[??]
Seller	Name of seller?	[??]
Buyer	Name of buyer?	[??]
Model	Model of car?	[??]
Color	Color of car?	[??]

Creating Form Sets

Authors

In your role as a form author, you will create Form Sets that are later used to create batches of finished documents. This involves telling **Dox**/**DB**/**AwD** one or more Locations where forms are stored, then assigning a group of forms to a particular Form Set.

1. Open the Form Sets Screen

Make sure no forms are open in your Word screen, then click the **Start** button to open the Form Sets screen.

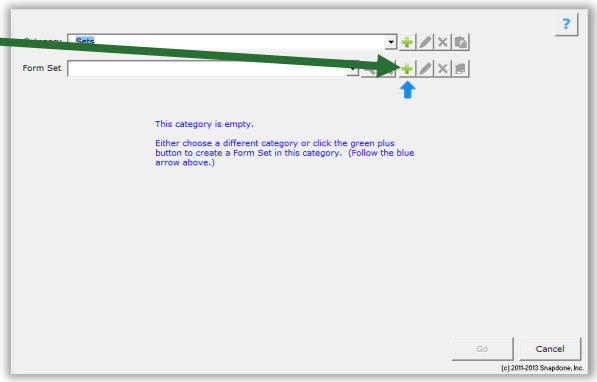
> Note that the **Start** button has two functions. If a form is open, it moves the cursor to the beginning of the Questionnaire. If a form is not open, it opens the Form Sets screen, where sets can be created or used.

2. Create a Form Set

Click ✚ to create a new Form Set.

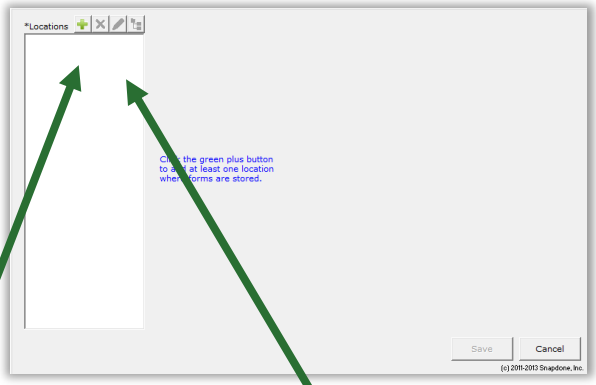
(If this is your first Form Set, the blue arrow gives a nudge in the right direction.)

You will be asked to name the Form Set. For this example, we'll use the name **Car Sale**.



> **Categories:** Large offices may want to subdivide their collection of Form Sets into various categories. If so, see page 118 to learn about the category controls at the top of this screen.

3. Add Locations If Necessary



When you first use **Dox**/**DB**/**AwD**, this list of Locations is empty. That's because **Dox**/**DB**/**AwD** doesn't know where you store forms. Maybe you keep them all in a single folder on your computer. Or maybe they're spread out among several different folders on your computer, your server, and other computers on your network.

Before **Dox**/**DB**/**AwD** can help you build a Form Set, we need to tell it one or more Locations where your forms are stored.

Click ✚ to add a Location to this list, and select a folder where forms are stored. You will be asked to give the Location a short name.

Offices that store all their forms in one place will only need one Location in this list. But if your forms are all over the place and you're managing several Locations, the other buttons at the top of this screen will be useful. Click ✕ to remove a Location (this breaks any Form Sets that use that location), to rename a Location; or to change the path of a Location (so you can easily adjust if the IT Department decides to change your server location).

The Goldilocks Rule: You might be tempted to choose the root of your C: drive as a Location, thinking, "Hey, every form I ever make is going to be stored *somewhere* on my C: drive." The problem is that thousands of other files exist on your C: drive too, and sifting through those thousands of files will severely impair the Form Sets screen.

Another sort of person will be tempted to create one Location for the forms stored in their **X:\My Forms\Litigation\Civil\Family Law\Custody** folder, and another Location for the forms stored in the neighboring **X:\My Forms\Litigation\Civil\Family Law\Probate** folder. This is also a problematic approach, because at this rate you will spend extra time adding a new Location nearly every time you create a new Form Set. And next week when the IT Department decides to replace Drive X: with Drive Y:, you'll have to go back and modify every one of them.

To create a Location that's *just right*, choose the highest level folder that contains only forms. So if the **X:\My Forms** folder contains nothing but forms (and perhaps subfolders that contain other forms), then that is a proper Location to be added to the list.

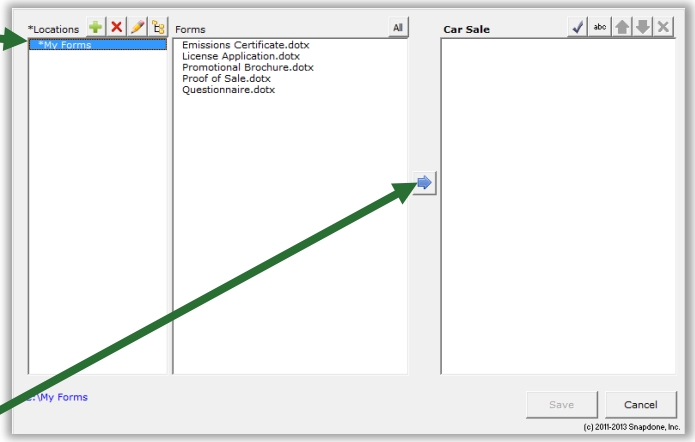
4. Add Forms to the Set

Here a Location named **My Forms** has been added in the left panel.

The center panel shows all the forms that exist in the selected Location, and the right panel shows all the forms that have been added to the **Car Sale** Form Set (none so far).

A Form Set can include as many or as few forms as you like. And the forms in a set can be drawn from multiple Locations.

To include forms in this Set, select each desired form and click ➡.



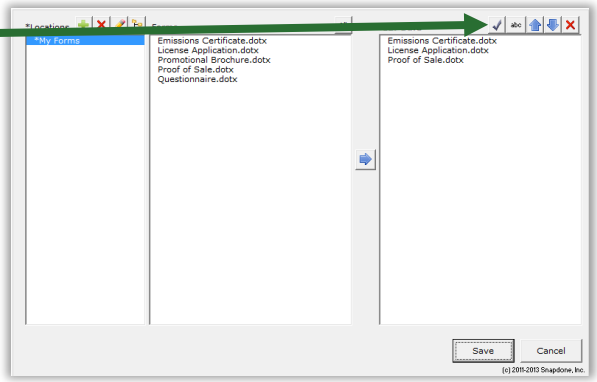
The five buttons above the Form Set provide further control.

Click ✓ to check the set, making sure the answers contained in the forms are compatible with each other.

Click **abc** to sort the forms alphabetically.

Select a form and click ⬆⬇ to move it up or down.

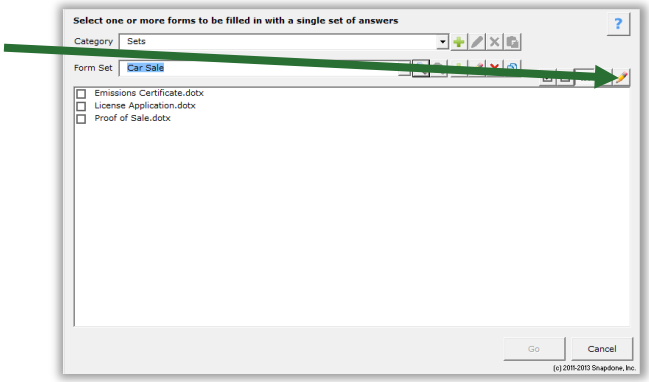
Click ✕ to remove a form from the set. (This does not delete the form wherever it's stored; it only removes the form from this Form Set.)



Once the Form Set is to your liking, click **Save** to return to the previous screen.

Compatible Answers: It's possible to create a Form Set that doesn't work due to incompatible answers. For example, if Form A includes a question labeled **Invntry** that asks for the name of a particular inventory item (a Text answer), and Form B includes an identically labeled **Invntry** question that asks for several inventory items (a Text series answer), those answers are incompatible – one is a single item, and the other is a series of items. This would cause an error message when the forms are used. When in doubt, use the ✓ button above to make sure the answers in your Form Set are compatible. More broadly, you can generate a Label Report (page 197) to check compatibility across any collection of forms, even if they're not in a Form Set.

If you need to make changes to the Form Set later, click to return to the Form Set editing screen.



5. Determining the Order of Questions

Remember that when a Form Set is used, **Dox**/**DB**/**AwD** examines each of the Questionnaires contained in those forms and compiles them into a single Questionnaire. The order of questions in that compiled Questionnaire is controlled by the order of forms in the Form Set. For example, if a particular question appears early in one form's Questionnaire but late in another form's Questionnaire, the ultimate placement of that question in the compiled Questionnaire will be determined by the form that appears higher in the Form Set list. So a good rule of thumb is to put your biggest, most well-organized form at the top of the list, and all the others will fall in line.

Dividers (page 194) also control the arrangement of answers in the compiled Questionnaire. If you use identical Divider headings in multiple forms, then **Dox**/**DB**/**AwD** will group those questions together when it creates the compiled Questionnaire.

Using Form Sets

Users

1. Select the Forms

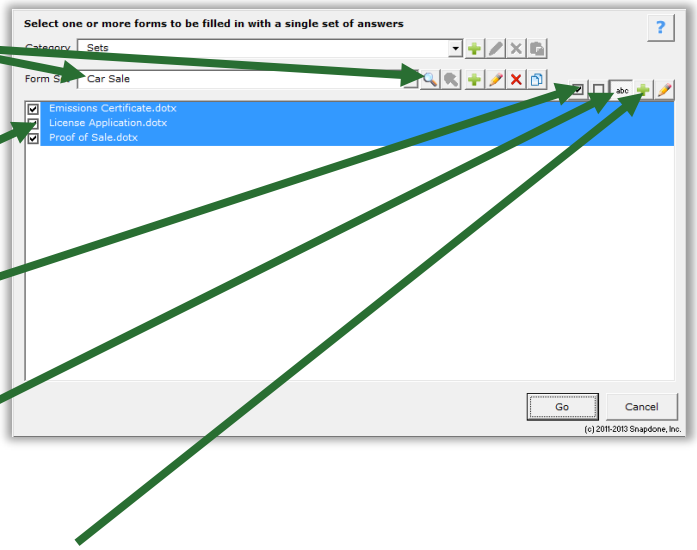
To use a Form Set, make sure no forms are open in your Word screen (either by closing any open forms or by creating a blank document), then click the **Start** button to open the Form Sets screen.

Select a Form Set. If there are lots and lots of sets, you can use the search button to find it more quickly.

Select the forms you want to use. You don't have to use *all* the forms in the set – just pick the ones you want.

Use the checkbox buttons to quickly select or deselect *all* of the forms.

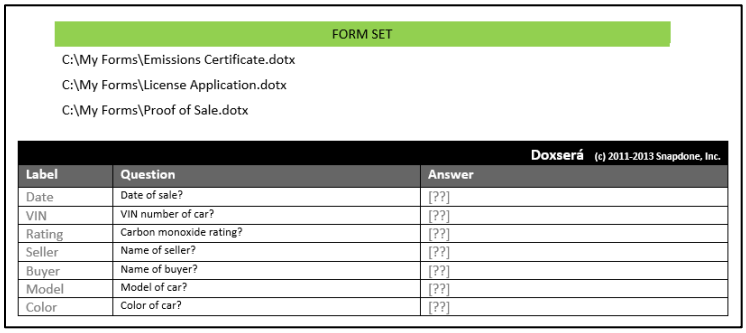
By default, the forms are presented in the order determined by the author of the Form Set. But you can click **abc** to sort them alphabetically if you prefer.



Occasionally, you might want to add a form "just this once" that's not included in the selected Form Set. You can do this by clicking and browsing to the form, wherever it may be stored on your computer or

server. But if you find yourself doing this repeatedly, you should really consider adding the form to the Form Set so that it's easier to select when you need it.

After selecting the forms you want to use, click **Go** to create a compiled Questionnaire that includes all of the questions contained in each of the selected forms, with no duplicates.



FORM SET

C:\My Forms\Emissions Certificate.dotx

C:\My Forms\License Application.dotx

C:\My Forms\Proof of Sale.dotx

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Label	Question	Answer
Date	Date of sale?	[??]
VIN	VIN number of car?	[??]
Rating	Carbon monoxide rating?	[??]
Seller	Name of seller?	[??]
Buyer	Name of buyer?	[??]
Model	Model of car?	[??]
Color	Color of car?	[??]

2. Answer the Questions

Fill in the compiled Questionnaire just as you would any other Questionnaire. You can even save and load answers into it (page 116).

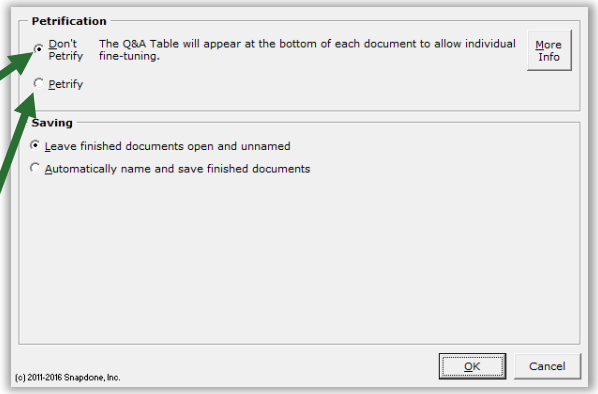
3. Fill in the Forms

When the answers are complete, click **Fill** to display the screen below.

Petrification

If you expect to further revise the individual documents, choose **Don't Petrify**. This appends a functional Questionnaire at the bottom of each finished document, so you can make changes and individually tweak each one. This should be your choice if you like to retain a "live" copy of each finished document with the Questionnaire intact.

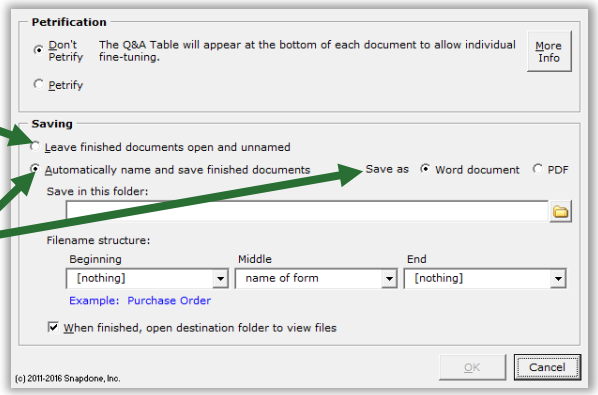
If you don't need to adjust the finished documents and don't want to retain a "live" copy, choose **Petrify**. This removes all Questionnaires and converts all fields to plain text, just as if you had used the Petrify command (page 115) on each finished document. You may also choose to automatically scrub metadata from the finished document during **Petrify** (page 199).



Saving

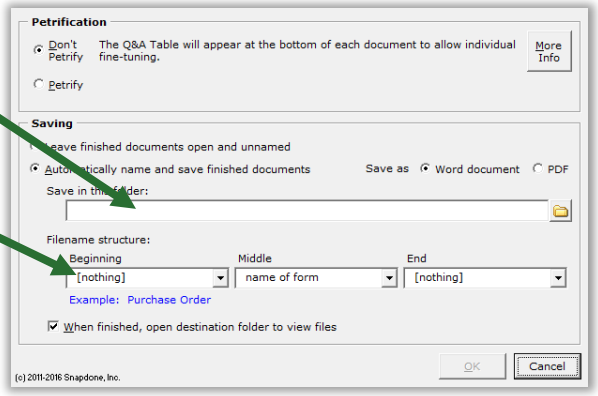
You may choose to **Leave finished documents open and unnamed**. When the Fill process is finished, each finished document will remain open in Word, and you can print, save, and/or edit each one individually.

Or you may prefer to have **Dox/DB/AwD Automatically name and save finished documents** in either Word format or PDF format. The finished documents will be named and saved according to the specifications described below.



Folder: Choose a folder where the finished documents will be saved.

Filename: Filenames are constructed from three parts: **Beginning**, **Middle**, and **End**. Each of the three parts may be (a) nothing; (b) today's date; (c) the filename of the original form; (d) a sequential number; or (e) text that you specify.



These building blocks can be rearranged in whatever configuration suits your needs. For example, suppose you're using a Form Set to create four documents for client Smith: Lease Agreement, Bill of Sale, Property Description, and Certificate of Insurance. You could choose to number the finished documents and include the client name on each:

Filename structure	
Beginning	sequential number
Middle	text: Smith
End	[nothing]

Resulting filenames
001 Smith.docx 002 Smith.docx 003 Smith.docx 004 Smith.docx

Or you could choose to name each finished document with today's date, the name of the original form, and ID No. **86A423X** in parentheses:

Filename structure	
Beginning	date (yyyy.mm.dd)
Middle	name of form
End	text: (86A423X)

Resulting filenames
2014.01.19 Lease Agreement (86A423X).docx 2014.01.19 Bill of Sale (86A423X).docx 2014.01.19 Property Description (86A423X).docx 2014.01.19 Certificate of Insurance (86A423X).docx

Click **OK** when ready, and the selected forms are used to create a series of finished documents, using answers provided in the single compiled Questionnaire.

More Tools for the Form Author

The Field/List/Condition Screen

Authors

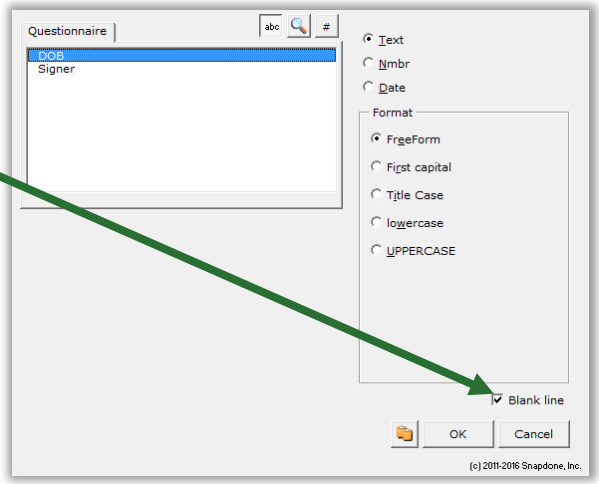
The **Field**, **List**, and **Condition** screens contain a few more features to make life easier for form authors.

Blank Lines

When inserting many types of Fields and Lists, a **Blank line** checkbox appears in the Format screen to determine what happens during the **Fill** step when answers are left empty in the Questionnaire.

If **Blank line** is checked for a particular Field or List and its answer is left empty, a blank line is left in the finished document to mark where info is missing.

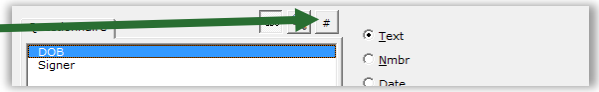
If **Blank line** is unchecked for a particular Field or List and its answer is left empty, the Field or List is removed from the finished document with no placeholder left behind.



Including blank lines is usually preferable, because they provide a visual cue when info is missing. But you may want to exclude blank lines for Fields in table cells, for instance, because the blank line looks confusing (and unattractive) when combined with the table grid lines.

Field/List/Condition Count

The Field screen includes a button to count how many times each answer is used in the form, whether as a Field, List, or Condition.

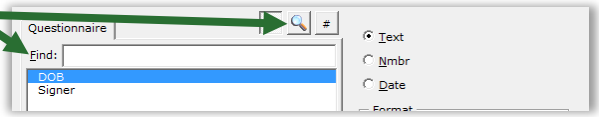


After clicking **#**, the column of numbers appears.

Search for a Label

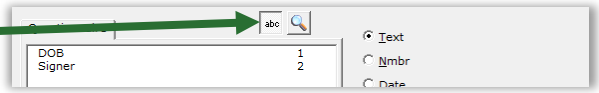
When the Questionnaire is long, it can be tough to find a particular answer. Click to display the **Find** box.

Type any part of the label name in the box to locate the one you want.



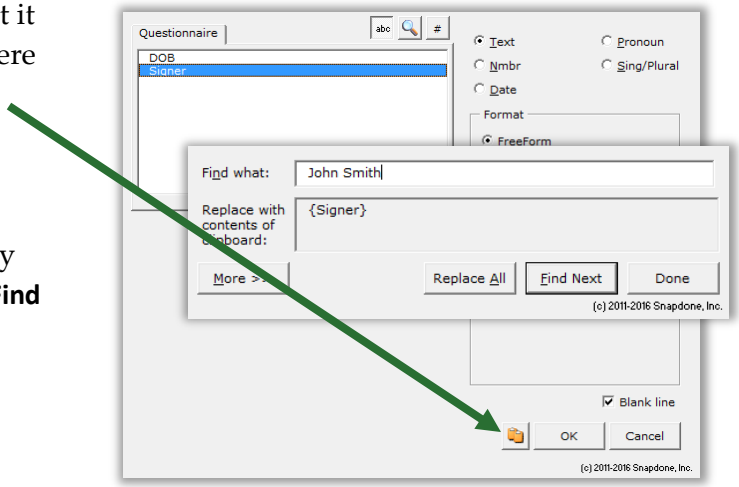
Alphabetize

Click **abc** to toggle alphabetical sorting. With alphabetical sorting turned off, labels are listed in the same order that they appear in the Questionnaire.



Find Other Locations to Paste Field

When adding a Field, instead of clicking **OK** to insert it once, click to find other locations in the form where you want to paste the same Field.



You can also open the Find-and-Paste screen directly from the **Dox**/**DB**/**AwD** tab by clicking **Tools**, **Find and Paste** (page 193).

Editing Questionnaires and Grids

Authors

The Questionnaire is "locked down" to prevent form users from accidentally changing the structure that was built by the form author. So you cannot use Word's ordinary table editing commands to delete a row, for example. But **Dox**/**DB**/**AwD** provides several complementary commands so you still have full control.

Questionnaire Removal

Questionnaires are ordinarily only removed from finished documents after a form has been used (Petrify, page 115). But if you're working on a form and you need a complete fresh start, you can click **Questionnaire**, **Remove** to completely wipe out the Questionnaire along with any Grids.

Row/Column

Click **Row/Column** for a list of commands to manipulate rows in the Questionnaire or columns in a Grid. Add and remove rows/columns with **Add** and **Remove**. Copy a row/column with **Copy**. Rearrange rows with **Move Row Up** and **Move Row Down**, and columns with **Move Column Left** and **Move Column Right**. (Select multiple rows/columns to move several at once.) Toggle the visibility of Labels, Derived answers, and Auto-MultiDoc answers with **Show/Hide**. Organize long Questionnaires and colorize Grids with **Divider** (page 194).

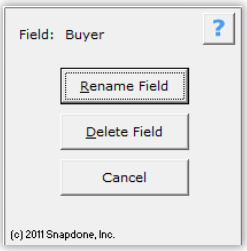
> Once a form is complete, you may want to hide the Label column of the Questionnaire so it does not distract form users. Click **Row/Column**, **Show/Hide** to toggle the visibility of that column.

Empty Cells

When you need a clean slate, select any number of cells in the Questionnaire or a Grid and click **Tools**, **Empty Cells** to delete their contents. To prevent corruption, only use **Empty Cells** on an *entire* row in the Questionnaire or an *entire* column in a Grid.

Relabeling and Deleting Questions

To relabel or delete a question in the Questionnaire or a column in a Grid, select its label and click **Field**. Relabeling or deleting a question also relabels or deletes all of its associated Fields in the form.



Clearing Answers

While creating a form, you may type sample data into the Questionnaire for testing purposes. When the form is finished, you can empty out all of the sample data by clicking **Tools**, **Clear Answers**.

Dividers

Use the **Row/Column**, **Divider** menu to organize large Questionnaires with explanatory dividers and eye-catching color schemes.

Lesson 34 Lesson 34 Lesson 34

Lesson 34: Dividers in Questionnaires

In this lesson, you make a Questionnaire more approachable by subdividing it into Buyer Info and Seller Info.

1 Create a Questionnaire

- Open a blank document and click **Questionnaire**, **Create** to add a Questionnaire

a Fill in the Questionnaire as shown

a

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	**Question**	**Answer**
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
SellerName	Name of seller?	
SellerAddr	Address of seller?	
SellerPhone	Phone number of seller?	

2 Add a Divider

a Put the cursor anywhere in the **BuyerName** row and click **Row/Column**, **Divider**, **Add**

Before

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
SellerName	Name of seller?	
SellerAddr	Address of seller?	
	Phone number of seller?	

a

After

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
[type heading here]		
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
SellerName	Name of seller?	
SellerAddr	Address of seller?	
ne	Phone number of seller?	

3 Add a heading and a second Divider

a Type **Buyer Info** in the Divider

b Put the cursor anywhere in the SellerName row and click **Row/Column**, **Divider**, **Add**, and type **Seller Info**

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Buyer Info		
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
SellerName	Name of seller?	
SellerAddr	Address of seller?	
SellerPhone	Phone number of seller?	

a

b

4 **Add color**
(if corporate gray isn't your thing)

a Put the cursor anywhere in the **Buyer Info** divider

- Click **Row/Column**, **Divider**, **Color**, **Blue**

b Put the cursor anywhere in the **Seller Info** divider

- Click **Row/Column**, **Divider**, **Color**, **Yellow**

Before

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Buyer Info		
BuyerName	a me of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
Seller Info		
SellerNa b	Name of seller?	
SellerAddr	Address of seller?	
SellerPhone	Phone number of seller?	

If you want to remove a Divider later, put the cursor in it and click **Row/Column**, **Divider**, **Remove**.

After

Doxserá (c) 2011-2016 Snapdone, Inc.		
Label	Question	Answer
Buyer Info		
BuyerName	Name of buyer?	
BuyerAddr	Address of buyer?	
BuyerPhone	Phone number of buyer?	
Seller Info		
SellerName	Name of seller?	
SellerAddr	Address of seller?	
SellerPhone	Phone number of seller?	

You can also colorize an entire Grid by putting the cursor in the Grid, clicking **Row/Column**, **Divider**, **Color**, and choosing a shade.

Reusing Questionnaires

Authors

As you create more forms, you will find yourself asking the same types of questions in many different Questionnaires. For example, an attorney might have one set of questions that are typically used in Estate Planning matters, another set for Litigation matters, and another for Corporate matters. Rather than recreate those Questionnaires from scratch in each form (or finding an old form to copy-and-paste the Questionnaire), save your frequently-used Questionnaires in a "bank" for future use.

Saving a Questionnaire

Note that this process is different than saving *answers* (page 116). Here we're saving the *questions* so that they can be used to quickly create similar Questionnaires in other forms.

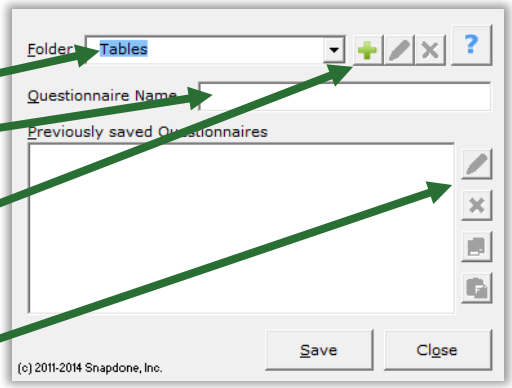
Open a form that contains a good Questionnaire and click **Questionnaire**, **Save** to open this screen.

Choose a **Folder** in which to save the Questionnaire.

Type a **Questionnaire Name**, and click **Save**.

Other buttons in this screen work the same as those in the answer-saving screen (page 118). Use the three buttons at the top to create, rename, and delete subfolders.

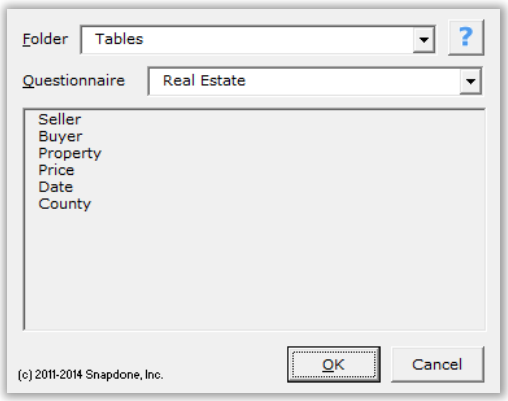
And use the four buttons on the right to rename, delete, copy, and paste previously saved Questionnaires.



r

Reusing a Saved Questionnaire

Once you've saved a Questionnaire, it can be retrieved into any document you want to turn into a similar form. Just click **Questionnaire**, **Load**, and select the previously saved Questionnaire.



Checking Forms

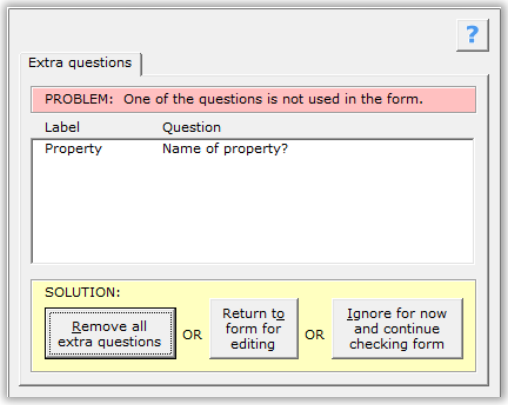
Authors

Check Form

After creating a form, it's a good idea to click **Check Form**. **Dox**/**DB**/**AwD** checks for problems or inconsistencies and helps fix them.

In this example, the Questionnaire contains a question asking for the name of the property, but the form doesn't contain any Fields that use that question. Clicking **Remove all extra questions** would remove that question from the Questionnaire, since it is not used in the form.

If you have forms that were created with earlier versions of **Dox**/**DB**/**AwD**, use **Check Form** to convert them to current standards – this will make the **Fill** process a little faster.



Check Labels in Multiple Forms

As your form library grows, consistency among Questionnaires becomes important so that answers can be saved from one form and loaded into another without retyping. Use consistent Labels, and use the same type of answer (Text, Checkboxes, Yes/No, etc.) every time you use a particular label.

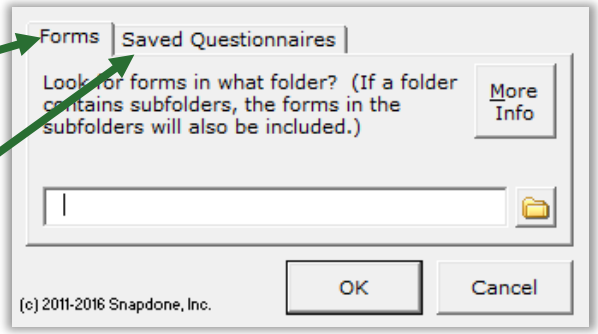
Dox/**DB**/**AwD** can help by generating a Label Report – a lexicon of all the Labels occurring in a particular collection of forms, complete with red highlighting to warn of potential problems.

Click ✓ **Check, Labels in multiple forms** to open this screen.

Choose **Forms** to examine a set of forms that exist in a particular folder, either on your local computer or a network.

Choose **Saved Questionnaires** to examine Questionnaires you have previously saved (page 196).

In either case, if the selected folder includes subfolders, the forms/Questionnaires in those subfolders will be included in the report.



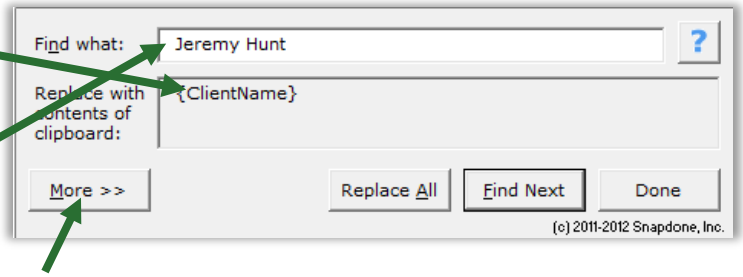
Find and Paste

Authors

The Find and Paste screen (**Tools**, **Find and Paste**) allows you to search for any text and replace it with whatever you most recently copied to the Windows clipboard. It is most commonly used when creating forms from old documents – search for the old client's name everywhere it appears in the document, and replace it with a corresponding Field that you've copied.

In the example shown here, a **{ClientName}** Field was recently copied to the Windows clipboard (with **Ctrl+C** or any other copying method).

The Find and Paste command is being used to paste that copied Field everywhere the name **Jeremy Hunt** appears in the document.



Click **More** to see the same search options that appear in Word's search-and-replace screen: wildcards, sounds-like, special characters, etc. A shortcut to the Find and Paste screen also appears in the Field screen when inserting Fields (page 193).

Highlighting Conditions and Lists

Authors

In a complex form with lots of coding, it's sometimes difficult to see exactly where a particular Condition or List ends. To highlight a whole Condition, List or Sublist, put the cursor in the beginning marker – **{if:** or **{List:** or **{Sublist:** – and click **Tools**, **Highlight List/Condition**.

Language for Date Fields

Users

When Date Fields are processed, the language used for months is determined by the computer's language settings. But you can override that setting and dictate that English be used instead by clicking **Tools**, **Language, English**.

Options

Authors

Authoring

In an office where the people who use forms are not the same people who author forms, you may wish to restrict non-authors from using **Dox**/**DB**/**AwD**'s authoring commands. To restrict those commands for a particular user on a particular computer, click **Options**, **Authoring**, type a password, and click **Restrict Authoring**. If you later decide to unlock authoring for that user on that computer, click **Options**, **Authoring**, type the password, and click **Unlock Authoring**.

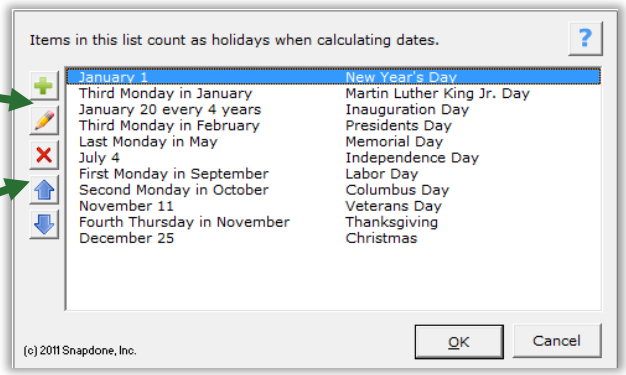
Holidays

When creating Date Offsets (page 17), you can choose to skip holidays. **Dox**/**DB**/**AwD** initially includes the 11 official U.S. federal holidays, but you can modify that list.

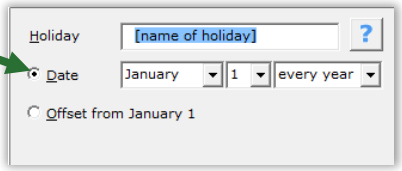
Click **Options**, **Holidays** to open this screen.

Clicking to create a new holiday or to modify an existing holiday opens the holiday editing screen, shown below.

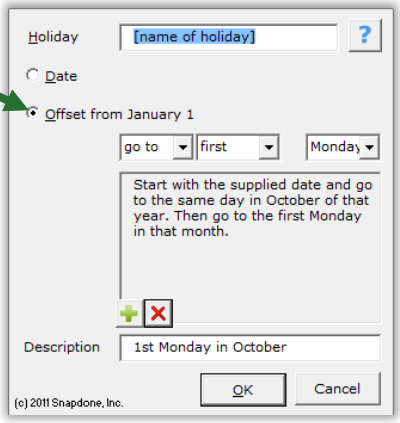
Click ✕ to remove a holiday or to reorder the list.



Select **Date** for holidays that occur on a specific date, either each year or in a particular year.



Select **Offset from January 1** for holidays that require a formula, like the first Monday in October.



Metadata Scrubbing

Microsoft Word includes sophisticated built-in metadata scrubbing, but it's easy to forget to use it. Click **Options**, **Metadata scrubbing** to automatically include scrubbing during Petrify (page 115).

Sharing Information

Dox/**DB**/**AwD** initially saves program info (saved answers, saved Questionnaires, holidays, Master Lists, Folios, and Wrappers) on your local computer. But if your firm owns more than one license, you will likely want to share all of that info with other people in your office. To do so, click **Options**, **Path** and enter the path to a shared folder on your network. If you previously saved info on your local computer, you will be asked whether you want to copy that info to the shared folder.

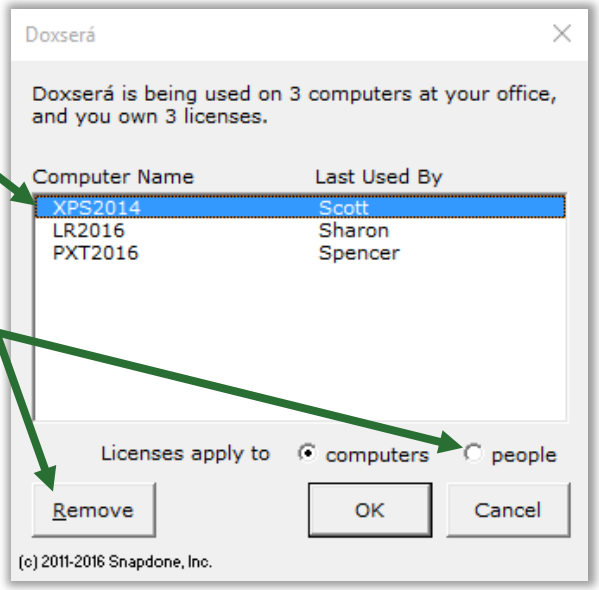
If several people in your office have separately saved info on their local computers and you now want to combine the various collections of files in one shared folder, exercise some discretion over which files are copied from each user to avoid duplications and overwriting. To do that, use Windows Explorer to browse to each user's local **Dox**/**DB**/**AwD** file location (indicated in their **Options**, **Path** screen) and copy only the desired files from that user's local folder to the new shared folder.

Uninstalling

To uninstall **Dox**/**DB**/**AwD** from a computer click **Options**, **Uninstall**. A message directs you to the file that needs to be deleted on your computer.

To remove a computer from **Dox**/**DB**/**AwD**'s list of licensed computers so that the license may be used on another computer, click **Options**, **Manage licenses**, select the computer, and click **Remove**.

You may also choose to have licenses apply *per person* instead of *per computer*. This is a good option for offices where a few people use a lot of computers (or a lot of virtual computers via remote connections).



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Here are some helpful online resources at www.theformtool.com:

Quick-Start Guide	If the 200-page Expert User Guide seems a bit … well … *daunting*, then this 20-page Guide will be more to your liking.
Expert User Guide	For the true form aficionado who needs to *know it all.* A copy is included in each program download. Or click here for an interactive online version.
Online training course	Click here to browse a collection of short, graduated videos that will take you from the basics to rocket science. We strongly encourage all users to review the Beginning and The Basics levels of The Learning Curve. Doing so will provide a strong foundation for productivity with the software and save an enormous amount of time.
Timely updates	If you haven't already done so, click here to sign up for our newsletter to stay informed of updates and improvements.
And the kitchen sink	Our general help page is here. Everything else you need is here at the Service Center, where you may search or browse hundreds of questions, answers, tips and suggestions, and contribute your own. You may also open a service ticket if you're having any trouble with the program.

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