

HotDocs User 11.2

TUTORIAL GUIDE

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Chapter 1: HotDocs **User** Tutorial

Overview

The lessons in this chapter introduce you to important concepts and features available in HotDocs. Because of the work you do in these lessons the procedure should be familiar when you begin automating your own documents, allowing you to focus on your documents, not HotDocs.

These lessons are short and are structured so you can complete each one in separate sessions. This allows you to learn HotDocs in the spare minutes you have during the day. You do not need to dedicate a large block of time to using the tutorial.

You should complete all of these lessons in order. In these lessons:

- You will learn how to create template libraries and add templates to them.
- You will learn how to create a new template and replace text in it with answer field tags, called *variables*. You will then learn how to group related variables into *dialogs* so that questions can be presented to users in logical groups.
- You will also learn how to create variables that perform simple as well as complex calculations.
- You will learn how to make sections of text in a template conditional so the text will be merged in the assembled document only when it is needed.
- Finally, you will learn how to repeat variable fields so a user can enter lists of answers.

Caution

The documents used in these tutorials were drafted to suit the purposes of the tutorial. They are not provided as valid legal documents.

What is HotDocs?

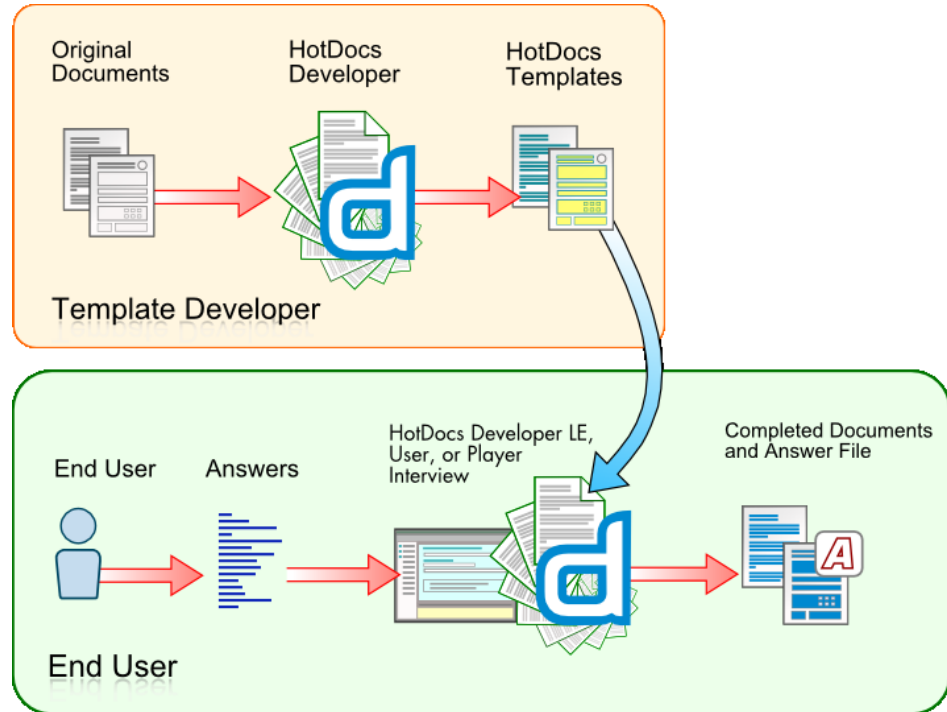
In your day-to-day routine, you may need to create custom documents for clients or customers. Without HotDocs, you must manually search through the document and replace the text that needs to be changed with the new information. This process can be time-consuming and error-prone.

Using HotDocs, however, you can transform any document into an interactive template by marking changeable text with HotDocs *variables*. Then, the next time you want to create a custom document, you can assemble the interactive template you've created. As you do this, you will be prompted for the information needed in the document and that information will be merged into the document.

Virtually any document in your workflow can be converted to a HotDocs template, including lengthy and complex documents. Using HotDocs, you can compile an

invaluable repository of special language, unique clauses or terms, correspondence, and more.

The following diagram shows the HotDocs process, from template development to document assembly:



By completing the various tutorials in this guide, you will learn how to use HotDocs to transform documents you regularly customize for clients into HotDocs templates.

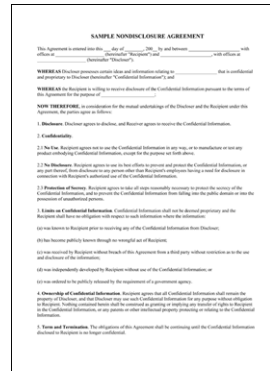
Lesson 1: Assemble a Document

Overview

Before you learn how to automate a template, it is a good idea to see how an already-automated template is used to assemble a custom document.

There are two types of templates with which you work in HotDocs—text templates and form templates:

- Text templates** are automated in a word processor, such as Microsoft Word or WordPerfect. As you automate a text template, you indicate in the text where users' answers should be merged. When you assemble a text document, you save the document as a regular word processor file. You have all of the editing capabilities that are included with word processor files.



- Form templates** use a Windows program (such as a form design program) to create a static form, or one in which the user will not be able to change or modify the underlying text. Once designed, you then use HotDocs to create a PDF version of the form. When you assemble a form document, you can view the assembled document in either HotDocs Filler or a PDF viewer.



When you use HotDocs to assemble a document, HotDocs presents a series of questions you must answer in an interview. Your answers are then merged into the assembled document. Once all of the answers are provided and you have verified that the document is correct, you can print the document or save it to disk. You also can save the answers you've provided in an answer file, which you can reuse to assemble other documents.

The following diagram shows the assembly process:



Start HotDocs and View a Template Library

To start the tutorial, you must first open the HotDocs template library.

A template library allows you to manage a collection of template files associated with a specific project or area of business. Using the tools available in the library, you can edit templates, assemble documents, and access other HotDocs tools, such as Answer File Manager, HotDocs Options, and Component Manager. Items referenced in a template library act as shortcuts to the actual files on disk.

To start HotDocs

- Choose **Start > Programs > HotDocs 11 > HotDocs**. The **Tutorial Templates** library appears.

-- Note

If the **Tutorial Templates** library does not appear, choose **Open Library** (**File** menu), select the library for your word processor in the default **Libraries** folder (for example, **DOCX Tutorial Templates.hdl**), and click **Open**.

Tip: The items you see in the left pane are not the actual HotDocs files on your local disk or network. Instead, they are *references* to the files, operating similar to Windows-type shortcuts. When you select an item for assembly, HotDocs follows the assigned file path to locate the actual template and then opens it.

This *Tutorial Templates* library you are viewing includes fully automated versions of the templates you will automate throughout this tutorial. You may refer to these templates for help as you complete the different lessons in the tutorial.

The template library is divided into two main panes. The left pane shows a list of the items referenced in the library. These items can include folders, templates, clause libraries, or other files.

The right pane displays two tabs of information about the selected item. If you click the **Properties** tab, you can see the properties of the selected file. If you click the **Preview** tab, you can preview the template's contents.

Assemble a Custom Document

Once you have opened the tutorial library, you can select a template for assembly.

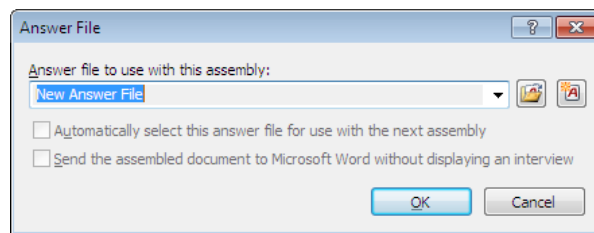
Each time you use a template to assemble a document, HotDocs displays a series of dialogs that prompt you to provide variable information, or information that changes for whomever the document is being created. (Examples of variables include names, dates, and instructions for conditional paragraphs).

Once you have entered the information the document requires, HotDocs merges your answers and carries out your instructions to produce a finished document. The document can then be printed, saved, or edited further.

To see how a HotDocs template produces a complete document, you will assemble an Employment Agreement. (You will automate your own copy of this template later in this tutorial.)

To assemble the Employment Agreement document

1. From the template list, select **Employment Agreement** and click  **Assemble**. The **Answer File** dialog box appears.



The **Answer File** dialog box shows a new, untitled answer file as the answer file that will be used with this assembly. This file does not yet contain any answers.

2. Click **OK** to continue. HotDocs displays the interview.


You see a list of dialogs (or groups of questions) in the left pane of the window. These dialogs comprise the *interview outline*. When you click one of these dialogs, HotDocs displays the associated questions and answer fields in the right pane, or *dialog pane*.

3. At the first dialog, **Employee Information**, type a name in the **Employee Name** answer field.
4. Answer the **Employee Gender** question.
5. Click **▶ Next** (or press **Page Down**) to advance to the next dialog, **Agreement Information**.
6. Answer questions in the dialog and click **▶ Next** to move to the next dialog in the interview outline.

As you proceed through the interview, dialog icons in the interview outline change appearance, indicating whether the questions in the dialog are unanswered (□), partially answered (◻), or completely answered (▣).

7. Continue answering questions in the interview, clicking **▶ Next** to move to new dialogs.
8. After the last dialog, the **End of Interview** dialog appears.

Tip: As you assemble documents, you can save your answers in an answer file, which can then be reused if you reassemble this document or if you assemble other documents that require similar information.

Tip: To enter dates, you can type the date directly in the answer field, or you can click the  **Calendar** icon to the right of the answer field and choose a date there.

The **End of Interview** dialog gives you options for working with the assembled document. For example, you can send a copy of the assembled document to the word processor.

Preview the Assembled Document

Once an assembled text document is sent to the word processor, the document is no longer associated with HotDocs. This means that if you change any text in the document, including any text that was merged because of answers you entered during the interview, the changes are only reflected in that document—not the template or the answer file. Because of this, you should always review assembled documents for accuracy before sending them to the word processor.

You can review a copy of the assembled employment agreement at the **Document Preview** tab of the HotDocs assembly window.

To preview the assembled document

- At the assembly window, click the **Document Preview** tab. The assembled document appears.

The **Document Preview** tab shows all of the answers you entered during the interview merged into the document.

Note


Because of technical restrictions, HotDocs cannot display the actual word processor document. Instead, it uses a third-party application to render the text of the template or document in RTF format. This means that Word templates or documents are previewed fairly accurately because they are in a format that can be displayed in RTF. Some of the formatting may be different, but, for the most part, it is a good representation. However, because WordPerfect text can't be converted to RTF at the time the document is displayed, the application is only able to display the text in plain format. In either case, however, the actual text in the template or document is correct. And, once you send the assembled document to the word processor, the document will appear exactly as designed.


Edit Answers at the Document Preview Tab (Word Users)

If you are using Microsoft Word, you can change answers while viewing the **Document Preview** tab. When you edit an answer, any other questions affected by the answer are likewise updated.

If you are using WordPerfect, skip to **Send the Assembled Document to the Word Processor** ([page 12](#)).

To edit an answer in the document

1. If answers aren't already highlighted (or marked as blue) in the document, click the  **Highlight Answers** button in the assembly window toolbar.

2. In the first paragraph of the document, double-click the answer for the employee's name. The **Employee Information** dialog appears in a pop-up interview.
3. Change the answer in the **Employee Name** field.
4. Click  **Finish**. The pop-up interview closes and all references to the employee's name are updated with your new answer.

Tip: You can also right-click the answer and choose **Edit Answer** from the shortcut menu.

Conclusion

You are now finished with this lesson. In it, you learned how to assemble a document from a HotDocs template.


In Lesson 2, you will create a new library.

If you are not continuing on to Lesson 2 at this time, close HotDocs by choosing **Exit** from the template library **File** menu.

Send the Assembled Document to the Word Processor

Now that you have completed the interview and previewed the assembled document, you can send a copy of it to your word processor.

To send the document to the word processor

1. At the assembly window toolbar, click the  **Send Document to Word Processor** button. HotDocs opens the word processor and displays the complete document.

When the document is in the word processor, you can print, save, or edit it. For the purposes of this tutorial, however, you will simply view the document and then close the word processor without saving the document.

2. Close the word processor document. Do not save it.
3. At the HotDocs assembly window, choose **Close** (File menu). When HotDocs prompts you, don't save your answers or a copy of the assembled document.

You are now finished with this lesson. In it, you learned how to assemble a text document. You also learned how to preview the assembled document before sending it to the word processor.

In the next lesson, you will begin automating your own version of the employment agreement.

If you are not continuing on to Lesson 2, close HotDocs by choosing **Exit** from the template library **File** menu.

Lesson 2: Create a New Template Library

Overview

When you start HotDocs, the template library appears. It is from this window that you begin most tasks in HotDocs, such as creating templates, choosing templates for assembly, and so forth.

The template library itself represents a collection of files you use to create custom documents for your clients. This collection can include text templates, form templates, clause libraries, word processor documents, HTML pages, and PDF documents.

When working with a template library, you should understand that files listed in a library act like shortcuts to the actual files on disk. This “virtual” organization of files provides an easy way to organize and manage the files you use in your practice or business. For example, even though template files can all be saved to the same common folder on disk, within the library, you can organize them into unique folders. Say you are creating an estate planning library. You can create three separate folders in the library, like *Wills*, *Trusts*, and *Other Documents*.

Tip: Windows Vista users may need to click the document's icon on the Windows taskbar in order to view the document.

Tip: By default, template libraries are created and saved in the *Documents\HotDocs\Libraries* folder. You can change the default folder at **HotDocs Options**.

Note

Template libraries have an **.HDL** file name extension.

Start the Tutorial

If you are continuing immediately from Lesson 1, skip the instructions for starting HotDocs and proceed to “[Create a New Template Library](#).”

If you closed HotDocs at the end of Lesson 1, complete the following steps.


To start HotDocs

- Choose **Start > Programs > HotDocs 11 > HotDocs**. The **Tutorial Templates** library appears.


Note

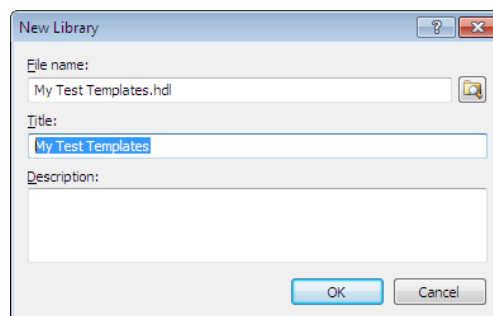
If the **Tutorial Templates** library does not appear, choose **Open Library** (**File** menu), select the library for your word processor in the default **Libraries** folder (for example, **DOCX Tutorial Templates.hdl**), and click **Open**.

Create a New Template Library

You will create a new template library to organize the templates you will automate throughout this tutorial. (If you ever need to refer back to this tutorial library, simply open it using the  **Open Library** command.)

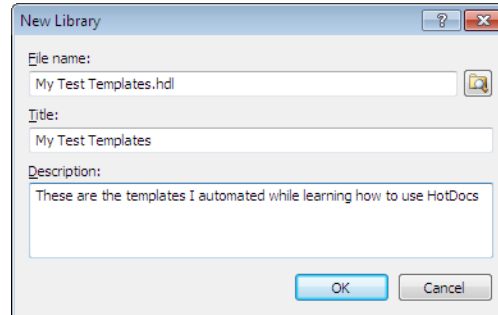
To create a new library

- At the existing template library, click the  **New Library** button. The **New Library** dialog box appears.
- In the **File name** box, enter **My Test Templates**. This is the name of the file that will be saved on disk.
- Click in the **Title** box. HotDocs suggests **My Test Templates** as the title. This is correct.



The title is a required property that is used to identify the library. It is assigned to the top folder in the library.

4. In the **Description** box, type **These are the templates I automated while learning how to use HotDocs**.



The **Description** is an optional property that can provide additional information about the library. It appears in the **Properties** tab of the library.

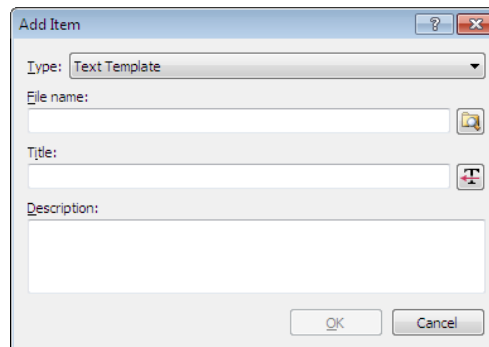
5. Click **OK**. The **Tutorial Templates** library is closed and the new library is created.

In the next part of this lesson, you will add templates to the library list.

Add Existing Template to the Template Library

To add a template to the library

1. Click on the top folder (**My Test Templates**) in the library.
2. Click the **Add Item** button. The **Add Item** dialog box appears.



Tip: These files are found in your default *Templates* folder, which is *Documents\HotDocs\Templates* by default.

3. Click the **Browse** button next to the **File name** box. The **Add Item File Name** dialog box appears.
4. Click **OK**. The file is added to the library.

You will automate this template later in this tutorial.

In the next lesson, you will create a new template and add it to the library.

Conclusion

You are now finished with this lesson. In it, you learned how to create a new template library. You also learned how to add existing templates to a library.

In Lesson 3, you will create a new template.

If you are not continuing on to Lesson 3 at this time, close HotDocs by choosing **Exit** from the template library **File** menu.

Tip: If you need to move a file in the list to a different location, you can click it and drag it up or down in the list. The horizontal bar that appears indicates where the file will be placed when you release the mouse button.

