HotDocs Developer 11.2
QUICK START GUIDE

HOTdocs™
automated document generation

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Minimum System Requirements

Before installing HotDocs, make sure your computer meets the minimum requirements necessary for using HotDocs:

Minimum Hardware Requirements

- 1 GHz processor (2 GHz or faster recommended)'
- 1 GB RAM (2 GB, recommended)
- 250 MB hard disk space for installation process, 85 MB thereafter
- 1024 x 768 screen resolution

> **Note**
>
> If you previously set your Windows display options to a font size greater than 100% you may find that some HotDocs dialog boxes do not display properly. You can check your font size setting in your Control Panel by clicking **Appearance and Personalization** > **Display**.

Recommended Software Requirements

We actively test and create fixes for software that meet our recommended software requirements. As such, we encourage you to use HotDocs with the following software:

Operating System
- Windows 7 (32-bit and 64-bit)
- Windows 8.1 (32-bit and 64-bit)
- Windows 10 (32-bit and 64-bit)

Word Processor
- Microsoft Word 2003, 2007, 2010, 2013, 2016
- Corel WordPerfect X3 SP2, X4, X5, X6 or X7 (not X8)

Internet Browser

Microsoft Internet Explorer 9, 10, and 11

Legacy Software Environments

The following list represents software that HotDocs is compatible with, but is no longer actively tested, nor do we fix issues specific to these versions.

Operating System

- Windows XP
- Windows Vista
- Windows 8 not updated to Windows 8.1

Internet Browser

Microsoft Internet Explorer 8

Platform Specific Software Requirements

To upload templates to HotDocs Server, Documents Services, or Cloud Services, and to enable Silverlight-based interviews for your HotDocs Server-enabled templates, the following items are required:

- Microsoft Silverlight 5 SDK
- Microsoft Silverlight 5.1 Runtime

Database Integration Requirements

If you plan to integrate desktop versions of HotDocs with a database, you must use one of the following databases:

- Microsoft Access
- Microsoft SQL Server
- Oracle 8 and up—It is strongly recommended that you use the Oracle Provider for OLE DB (OraOLEDB) instead of the Microsoft OLE DB Provider for Oracle (MSDAORA)
- Any ODBC level 1-compliant database (using the Microsoft OLE DB provider for ODBC (MSDASQL))

--- **Note** ---

HotDocs may also function with other OLE DB providers, as long as the following conditions are met: 1) The OLE DB provider must accept plain-text command strings, 2) the OLE DB provider must return rowsets (ADO Recordsets) as the result of commands—not records and/or streams, and 3) the database must reside in a location accessible by HotDocs. OLE DB providers that expose data in individual Rows and/or Fields (but not Rowsets) will not work. Please keep in mind that these are recommended guidelines and meeting these guidelines does not necessarily mean your provider will work with HotDocs.

Additional Minimum Requirements

If you install HotDocs using the MSI installer instead of the EXE installer, you must install the following software items manually:

- Visual C++ 2010 Redistributable (x86 or x64)
- Visual Studio 2010 Tools for Office Runtime (x86 or x64)
- Microsoft .NET Framework 4.0 Client Profile
- Open XML SDK 2.5
- MSXML 6.0 (If using Windows XP SP2 only)

Installing HotDocs

When you insert the HotDocs installation disk in your CD-ROM drive, a CD browser window should automatically appear. From this window, you can view the Readme and install HotDocs. Once installation has started, HotDocs prompts you for all of the information it needs to complete the process.

Before installing HotDocs, make sure your computer meets the minimum requirements necessary for using HotDocs (page 5).

To install HotDocs

1. Close all open programs, especially any word processors or existing versions of HotDocs you may have open.

2. Locate and double-click the **setup.exe** (for 32-bit operating systems) or **setup64.exe** (for 64-bit operating systems) file here. Follow any download prompts. When HotDocs Setup starts, click **Next**.

3. Select **I accept the terms of the license agreement** (page 30); then click **Next**.

4. On the Installation Type page, choose the type of license (page 10) you want to use:
    - 30 Day Trial—does not require a license key
    - Licensed—requires a license key

5. If you are using a license, select **Licensed**, then in the **Key** text box, type the license (page 10) HotDocs sent you.

    --- **Note** ---
    In order for HotDocs to validate the license key, the install needs to access the HotDocs license server at https://licensing.hotdocs.ws/. If your network is configured with a proxy server or filter, you may need to ask your network administrator to add the license server URL to your network's "white list." If this is the case, you also have the option to install the software on a 30-day trial basis. If you choose the latter option, HotDocs attempts to connect to the licensing server whenever you start HotDocs, and once your network administrator enables access to that URL, HotDocs authenticates your installation. If the problem persists, please contact Support at http://www.hotdocs.com/support.
    ----

6. Best practice is for you to select the **Typical** install.

Tip: If you want HotDocs to install in the background, you can perform a silent install.

Tip: To install HotDocs from a CD, select **Run** from the **Start** menu and type **D:\setup**. (Substitute the correct drive letter if your CD-ROM drive is not mapped to **D:**.)

- If you want to change the install location, **Browse** to the new location.
- If needed, change the **System Language**.

7. Click **Next**.

8. Select the correct version of your word processor. If you have more than one word processor installed, use the drop-down list to select the one you want HotDocs to use by default; then click **Next**.

9. Check that the settings are correct (if not, click **Back** and change the settings as needed); then click **Install**.

10. Comply with any other install instructions; then click **Finish**.

11. Fill out the HotDocs Product Registration form in your web browser.

-- **Note** ---

If you previously set your Windows display options to a font size greater than 100% you may find that some HotDocs dialog boxes do not display properly. You can check your font size setting in your Control Panel by clicking **Appearance and Personalization** > **Display**.

Starting and Exiting HotDocs

Before you edit templates or assemble documents, you must first open the HotDocs library, which provides the functionality for working with your template files.

To start HotDocs

- From the **Start** menu, choose **HotDocs** > **HotDocs Developer**. The HotDocs library window appears.

To exit HotDocs

- From the File menu, click **Exit**.

Uninstalling HotDocs

You can remove existing versions of HotDocs from your computer by using the HotDocs uninstall program. When you uninstall, HotDocs removes all program files from your computer. However, the uninstall feature does not remove any custom templates, libraries, or answer files you created.

To uninstall HotDocs

1. At the **Start** menu, open the **Control Panel**.

2. From the Programs area, find and click the option to remove or **Uninstall a Program**.

3. Select the version of HotDocs that needs to be removed, then click **Uninstall**.

4. Follow the on-screen prompts to remove the application.

> **Note**
>
> If you plan to reinstall HotDocs and you don't want to retain custom settings from your prior installation, you must delete the user-specific settings HotDocs added to the System Registry. For details, see Restoring Installation Defaults (page 15).

HotDocs Licensing Overview

With the HotDocs 11.1 release, HotDocs is implementing a new licensing scheme for desktop HotDocs. When you install HotDocs, you encounter two licensing options:

- 30 Day Trial (an evaluation license requiring no key)
- Licensed (requires a valid HotDocs license key)

> **Note**
>
> In order for HotDocs to validate the license key, the install needs to access the HotDocs license server at https://licensing.hotdocs.ws/. If your network is configured with a proxy server or filter, you may need to ask your network administrator to add the license server URL to your network's "white list." If this is the case, you also have the option to install the software on a 30-day trial basis. If you choose the latter option, HotDocs attempts to connect to the licensing server whenever you start HotDocs, and once your network administrator enables access to that URL, HotDocs authenticates your installation. If the problem persists, please contact Support at http://www.hotdocs.com/support.

Obtaining a License Key

HotDocs provides the following types of license keys:

- A permanent license
- A time limited license (usually for extended evaluations)

To receive a valid license
- Contact HotDocs at 800-828-8328, support@hotdocs.com, or www.hotdocs.com/support.

Renewing an Expired License

If you have a time limited license, you should ensure that you replace or extend your license before the term of your license expires; otherwise, your license key becomes invalid.

To renew an expired license
- Contact HotDocs at 800-828-8328, support@hotdocs.com, or www.hotdocs.com/support to obtain a new license, or to extend the term of your current license.

Resolving an Invalid Key Error

There are various scenarios whereby you may receive a license key error.

To resolve licensing errors

- If you receive any other license key error than an expired license, Contact HotDocs at 800-828-8328, support@hotdocs.com, or www.hotdocs.com/support.

HotDocs Installation Overview

When you install HotDocs, two separate installations take place at once: the *HotDocs Setup* and the *Current User Setup*. This two-part installation process enables multiple users on a single workstation to access HotDocs, using individualized custom files and settings.

HotDocs Setup

When you first install HotDocs from *Setup.exe* (for 32-bit operating systems) or *Setup64.exe* (for 64-bit operating systems) (page 7), HotDocs installs the program files needed to run HotDocs. It also installs the HotDocs Help files and JavaScript files (which are needed for developing HotDocs Server templates). These files are installed, by default, to *C:\Program Files\HotDocs*. This location is not user-specific, so all users of a single workstation can access to the files.

As HotDocs installs these files, it registers the following information about them in the *Local Machine* key of the Windows System Registry:

- The location of the HotDocs executable file
- Which word processors HotDocs supports.
- Preliminary file location information for the various files HotDocs uses, including library files and template set files.

HotDocs requires the registry to store all of this information for HotDocs to work correctly.

Windows System Registry Definition

The Windows System Registry is a central hierarchical database in Windows used to store information necessary to configure the system for one or more users, programs, and hardware devices. The Registry contains the following information that Windows continually references during operation:

- Profiles for each user,
- The programs installed on the computer and the types of documents each can create
- Property sheet settings for folders and program icons
- What hardware exists on the system
- Which ports are being used.

> **Note**
>
> (Taken from the *Microsoft Press Computer Dictionary, Third Edition. Copyright © 1998 Microsoft Press*.)

Current User Setup

When you install HotDocs, the installation creates a folder named Source in the HotDocs program folder. This folder contains several files including:

- Word processor macro or startup files
- The user spell-checking dictionary
- The HotDocs tutorial files.

In order for HotDocs to access them during normal usage, these files must be in user-specific folders on the disk. However, because multiple users may use a single workstation, HotDocs Setup doesn't install these files. Instead, when a user logs on to the workstation and runs HotDocs, the Current User Setup copies these files to the correct locations for that user (page 13).

The Current User Setup also registers information about each user in the *Current User* key of the System Registry. This information includes default file locations for such things as:

- Templates,
- Answer files
- Library files.

As each user specifies preferences for working with HotDocs, these settings are likewise written to the *Current User* key. This enables each workstation user to have his or her own HotDocs settings without other users overriding those settings with their own preferences.

The Current User setup happens each time a user starts HotDocs. This means that each time you run HotDocs, HotDocs checks to make sure all of the required files (such as word processor startup files) are in their proper locations. If HotDocs can't find a file, HotDocs replaces it using a copy from the Source folder.

For example, even if you delete the tutorial files that are installed to your default Templates folder, because of the Current User Setup folder, the very next time you start HotDocs, HotDocs recopies the files from the Current User Setup folder to your default Templates folder. If you want to prevent this behavior, you can open the Source folder, select the Tutorials subfolder, then on your keyboard, press Delete.

---- **Caution** --
 HotDocs recommends you leave the tutorials intact within the Source folder since they are an important resource in learning how to user HotDocs.

Default File Locations in HotDocs

When you install and use HotDocs, the installation program makes several entries in the Windows System Registry that indicate to HotDocs where to look for files, as well as where to suggest you save files. In most situations, HotDocs uses this information each time you perform a task in HotDocs. For example, each time you

create a new template, HotDocs suggests a default location for the new template, based on the information it finds in the System Registry.

The following is a list of these default locations:

Tip: If you perform a custom installation, HotDocs installs files and sets registry entries using the information you specify during installation. Whatever settings you specify during installation apply for all users of the workstation.

File Type	Default Location
Program Files	\<Program Files>\HotDocs\
XML Schema Files	\<Program Files>\HotDocs\Schemas\
JavaScript Files	\<Program Files>\HotDocs\ServerFiles\scripts
Silverlight Files	\<Program Files>\HotDocs\ServerFiles\bin\
Help Files	\<Program Files>\HotDocs
Spelling Dictionary	\<Documents>\HotDocs\Spelling
Library Files	\<Documents>\HotDocs\Libraries
Template Files Includes text templates, form templates, interview templates, and auto-assemble files	\<Documents>\HotDocs\Templates
WordPerfect Macro Files	WordPerfect Macro Folder
MS Word Startup Files	Microsoft Word Startup Folder
Template Sets	\<Public Documents> \HotDocs\Templates
Text Document Files	Word Processor Documents Folder
Form Document Files	\<Documents>
Answer Files	\<Documents>\HotDocs\Answers
Publish Settings Files	\<My Documents>\HotDocs\Publish
Catalog Files	\<Public Documents>\HotDocs\Catalogs

--- **Note** --
\<Program Files> refers to a 32 bit machine; if your machine runs a 64 bit OS, program files is followed by x86: \<Program Files (x86)>.

Adjusting the Default HotDocs Options

Once HotDocs finishes installing, you can change most of the locations listed above.

To adjust the hotdocs options

1. Open HotDocs, then click the ☑ **HotDocs Options** button in the library toolbar.

2. Either click the **File Locations** folder or expand the **Word Processors** folder. See the HotDocs Help for details.

HotDocs Player Compatibility with Other Desktop HotDocs Products

If you want to install HotDocs Player on the same system with another HotDocs Desktop product (User, Developer LE, or Developer), there are some important things to keep in mind:

- If HotDocs User, Developer LE or Developer is already installed on the computer, then by default, HotDocs installer places the Player binary files at *C:\program files\hotdocs\player*.
- You should ensure that the version of Player you install should be the same or a more recent release than the version of User, Developer LE or Developer installed. This insures that both programs can work together and that Player can handle HotDocs templates you produce using the other Desktop product.
- Once you install Player on a machine with another desktop HotDocs product (User, Developer LE or Developer) already installed, if you double-click a HotDocs Library (**.HDL**) shortcut, HotDocs uses Player to open the library. To open a file within User, Developer LE or Developer, you must open that program, then click **Open Library** to navigate to the library file you want to edit.

> **Caution**
> Any HotDocs options you change in HotDocs Player also apply for any other desktop product on the same machine.

Restoring Installation Defaults

At times, you may want to restore default settings in HotDocs. You can accomplish this by clearing the *Current User* key of the registry.

> **Caution**
> You must be extremely careful when working in the Windows System Registry. Failure to follow the instructions below with exactness could result in your making changes that negatively affect all programs on your computer. You may want to ask your system administrator for help if you are unsure of what you are doing.

To restore default settings

1. From the Start menu, select **Run**. The Run dialog box appears.

2. In the **Open** text box, type **regedit** and click **Yes**. The **Registry Editor** appears.

3. Navigate to **HKEY_CURRENT_USER > Software > HotDocs > HotDocs.**

4. Select the **HotDocs** subfolder and press **Delete**. Click **Yes** to confirm the deletion.

5. Check for the registry key **HKEY_CURENT_USER > Software > LexisNexis > HotDocs**. If this location exists, proceed to Step 6. Otherwise, proceed to Step 7.

6. Select the **HotDocs 6** subfolder and press **Delete**. Click **Yes** to confirm the deletion.

7. Close the **Registry Editor**. When you restart HotDocs, HotDocs resets the registry to the default settings.

Compatibility of HotDocs 11 Files with Earlier Versions of HotDocs

This topic describes the compatibility of files between earlier versions of HotDocs and the current version of HotDocs:

Installs and Overwrites

When you install the current version of HotDocs over earlier versions of HotDocs (starting with HotDocs 6), it overwrites the previous installation.

Library Files

HotDocs contains both template and answer libraries where you can organize your approach to templates and answer files respectively.

Template Libraries

HotDocs 2008 and earlier saved template libraries in binary format. Starting with the release of HotDocs 2009, however, you can save template libraries in either binary format or as XML (page 20). When you open an existing template library in HotDocs, HotDocs keeps the template library in binary format until you either manually convert the file to XML format, or you attempt to use foreign characters (characters that are not compatible with your system's default language) in the properties of the library. When you do this, HotDocs prompts you to save the file as XML.

To manually save the file in either format:

- From the **File** menu, choose **Save Library As** and then choose the option you want from the **Save as type** drop-down list

Answer Libraries

HotDocs 6 through HotDocs 2008 supported binary answer libraries (or answer libraries with the .HAL file name extension). Starting with the release of HotDocs 2009, however, HotDocs now supports both binary answer libraries and XML-based answer libraries (which use the .HDL file name extension). HotDocs continues to use binary answer libraries as long as the answer file properties of items in the library use characters compatible with your computer's default language. If you define answer file properties that contain foreign characters, HotDocs creates an XML-based answer library (so that it can properly display these characters in the **Properties** tab of the library window.)

Templates and Component Files

When you upgrade from earlier versions of HotDocs (starting with HotDocs 6), HotDocs prompts you to convert your component files to the format of the current HotDocs release. When you encounter this prompt, if the file is in the HotDocs 2009 or HotDocs 10 format, you can choose to convert the file either to the current, HotDocs 11 format, or to keep it in the format in which it was last edited. For example, if you are upgrading from HotDocs 2009, you can choose to convert the file to HotDocs 11, or you can choose to keep it in HotDocs 2009 format.

Once you convert a component file to HotDocs 11format, you can make it backwards-compatible with HotDocs 2009 and HotDocs 10 by specifying a specific format at the **Component File Properties** dialog box of Component Manager.

If you need to keep several templates in their existing pre-HotDocs 11 format and you don't want to be prompted to make this selection on a template-by-template basis, you can use Template Manager to change the component file format for several files at once. See Modify Component File Properties Across Multiple Files for details.

Answer Files

HotDocs 6 through HotDocs 2008 releases supported two types of answer files—binary answer files (.ANS) and XML answer files (.ANX). Starting with HotDocs 2009, HotDocs saves answer files in XML format only. This means that if you open a binary answer file (an .ANS file) in HotDocs 11.x, change one or more answers, and then click **Save**, HotDocs saves the answer file as XML. However, the file exten-

sion does not change; instead, it continues to display as .ANS even though the contents are XML.

If you are using HotDocs 11 to create answer files for use with earlier versions of HotDocs, you must save the answer file in a backwards-compatible format. Specifically, if you need to use the answer file with HotDocs 2005 through HotDocs 2008, you must save the file as a HotDocs 2005-2008 answer file. You can select this format at the **New Answer File** dialog box or the **Save Answer File As** dialog box. You can also select it at the **Item Properties** dialog box for the answer file. Any unsupported foreign characters you use appear may as boxes or question marks in HotDocs 2005-2008.

---- **Note** --

You can use HotDocs 11 answer files with HotDocs 2008 SR2 or higher without making the files backwards compatible.

---- **Caution** ---

When you convert a template created in an earlier version of HotDocs, you should check for to see if it contains any variable names written in all uppercase letters (ex: CLIENT NAME), since HotDocs can interpret these as expressions or instructions, causing an error. For more information on naming variables see Tips on Naming Your Variables.

HotDocs in Microsoft Word 2007, 2010, and 2013

If you are using HotDocs with Microsoft Word 2007, 2010, or 2013, you should be aware of a few differences with how HotDocs works in Microsoft Word 2007 and later as opposed to earlier versions of Word:

- **Location of HotDocs toolbar:** To access the HotDocs editing and navigation toolbar buttons, you must click the HotDocs tab of the Word ribbon. This displays each of the editing and navigation commands.
- **Accessing the HotDocs button:** The HotDocs button is located on the HotDocs tab of the Word ribbon.
- **File formats:** Word 2007/2010/2013 includes two new XML-based template formats—.DOTX (indicates the file does not use macros) and .DOTM (indicates the file does use macros). These template formats are not supported in HotDocs. However, if you are using Word 2007/2010/2013 to save assembled documents, you can save in these formats: .DOCX and .DOCM.

- **Compatibility Mode:** When you edit existing templates in Word 2007/2010/2013, the template opens in Compatibility Mode. According to the Microsoft Word 2010 Help file, "Compatibility Mode makes sure that no new or enhanced features in Word 2010 are available while you work with a document, so that people who are using previous versions of Word will have full editing capabilities." If you plan to use your templates with just Word 2007/2010/2013, you can convert your templates to Word 2007-13 format using the Word conversion tool. (See the Word Help file for additional information on doing this.) If you plan to distribute or share your templates with users who are using earlier versions of Word, however, you should either continue to work in Compatibility Mode, or you should take care not to use features specific to Word 2007/2010/2013. (The Word Help file has a full list of Word 2007/2010/2013 elements.)
- **Styles:** When you create a new, empty Word template, HotDocs applies whatever styles are in HotDocs.dotx to the new template. When you create a new template based on another template or document, HotDocs applies the styles used in that template or document to the new template.

HotDocs and XML File Formats

In versions of HotDocs prior to HotDocs 2009, HotDocs saved HotDocs-specific files such as library files, component files, and so forth in *binary* formats.

Binary file formats are common in most software applications. They enable information about the files to be encoded for storage and processing purposes; however, in the case of HotDocs, they have the following disadvantages:

- Storing information in a binary format limits third-party application developers' ability to inspect, edit, or otherwise make use of information contained in these files
- The binary formats used in HotDocs do not support the use of foreign characters, or international characters that are not represented in your computer system's default language

Previous versions of HotDocs supported saving library and answer files both in binary format, and XML format. While HotDocs can still read and write (save) library files in both XML and binary formats, from HotDocs 2009 onwards, HotDocs can only read (but not write) answer files in binary format. HotDocs now saves all answer files in XML format only. HotDocs made this change as part of its support of Unicode, because Unicode answers cannot be saved in binary format. See *Compatibility of HotDocs 11 Files with Earlier Versions of HotDocs* () for details on using backwards-compatible HotDocs 11 answer files.

HotDocs' move to saving files in the XML format provides the following benefits:

- XML format lends the ability to more easily recover files that become corrupted or unusable (using the XML schema documents, you, or someone with XML programming experience, can investigate how to reconstruct the contents, where this is still possible)

- XML format enables third-party developers to integrate HotDocs with other applications
- XML format enables support of a wide range of left-to-right-reading international characters

HotDocs uses XML schema documents (or XSD files) to validate XML content. By default, these documents are located at *C:\Program Files\HotDocs\Schemas*.

Caution
If you generate XML files using a program other than HotDocs, you must ensure the encoding declaration in the XML file matches the actual encoding used in the document.

XML Explained

In HotDocs, template libraries, answer libraries, answer files, and component files are all created using XML. This format enables easier integration between HotDocs and other third-party applications. It also enables you to use a wider range of international languages (as long as they read left to right) both as you develop templates and as you assemble documents.

XML (eXtensible Markup Language) is a computer language designed to store and transmit data between applications. Like HTML (HyperText Markup Language), it contains customized markers, or tags, that identify the information in an XML file. However, while HTML describes the way a page looks, XML defines what the content is and controls the way data is structured, making it easy for diverse programs to access the same information.

For example, in HTML, to indicate a book title, you would italicize it using the <i> tag. In XML, you could mark the title using a <booktitle> tag. The HTML tag simply formats the text (making it italic), while the XML tag actually defines what the text is (a book title).

All XML code must be validated to ensure proper use of tags and the correct exchange of data with the application accessing the XML (in this case, HotDocs). This validation happens using either a document type definition file (or DTD) or an XML schema document (or XSD file). HotDocs files use the latter method for validating XML content. By default, these schema documents are found in *C:\Program Files\HotDocs\Schemas*.

Several resources are available on the Internet and in print that contain extensive information on XML, including the official documentation of the World Wide Web Consortium, which is a non-profit organization responsible for setting Internet standards. The W3C provides a useful index that references XML technology.

Caution
Only people who have a solid understanding of XML should attempt to manually modify the contents of an XML file.

International Characters in HotDocs

Unicode is a computer specification that makes it possible for computers to represent and manipulate characters used in most of the world's written languages.

According to the technical description given by the Unicode Consortium:

> Unicode provides a consistent way of encoding multilingual plain text and brings order to a chaotic state of affairs that has made it difficult to exchange text files internationally. Computer users who deal with multilingual text—business people, linguists, researchers, scientists, and others—will find that the Unicode Standard greatly simplifies their work. Mathematicians and technicians, who regularly use mathematical symbols and other technical characters, will also find the Unicode Standard valuable.[1]

--- **Note** ---

This help file defines Unicode characters that are not part of your typical language set as foreign or international characters.

HotDocs and Unicode

Unicode support in HotDocs makes it possible to automate and assemble documents in non-native, left-to-right-reading languages. This includes automating and assembling Microsoft Word templates as well as PDF-based form templates.

--- **Caution** ---

WordPerfect does not support Unicode; therefore, Unicode characters you add to templates do not display properly when HotDocs assembles them into WordPerfect documents.

For example, say you need to automate a template using the German language. You can draft the underlying template text in German, and then create all of the components in the template using German (if you want). This may include assigning component names, titles, prompts, resources, and so forth in that language. Users can then complete the interview by typing their answers in German. The resulting assembled document appears entirely in German.

--- **Note** ---

While HotDocs supports using Unicode to produce templates, interviews, and assembled documents in most languages supported by Unicode, the HotDocs application itself continues to be an English only application.

Concerns with Unicode Character Fonts

Even though HotDocs supports Unicode characters, these characters may not display properly if you or users do not have fonts installed that can display them. Some scenarios that may cause this problem follow:

[1.]"The Unicode Standard: A Technical Introduction. 17 Sept, 2008, 12:27 PM. 5 Dec 2008 http://www.unicode.org/standard/principles.html.

- Say you automate a template using the Tahoma font on Windows 8. If someone loads that template on an earlier operating system such as Windows Vista, some of the characters you used in the template may not display properly because those characters may not be supported in the version of Tahoma available on that earlier operating system.
- If you use a very specialized font for displaying symbolic characters in your template, if your users do not have the same font installed on their computers, your text appears as unrecognized characters—usually boxes or question marks.

You should also be careful when assigning font styles (such as bold or italic) to international characters, as these characters may not display correctly when you apply these styles.

Foreign Language Number and Date Formats

The following is a list of formats you can customize for foreign language Number and Date variable formats:

- Alphabetic cardinal numbers (nine, one thousand nine hundred and ninety)
- Ordinals both in dates and numbers (9th, ninth)
- Month names and abbreviations (June, Jun)
- Weekday names and abbreviations (Sunday, Sun)
- The keyword percent used in a number format
- The keyword minus used in a number format
- A comma, period, or spaces used as a thousands separator
- A comma or period used as a decimal separator

You should be familiar enough with the foreign-language equivalent of these words and phrases to ensure proper spelling and punctuation.

Working with the Library

If you want to create a new template "from scratch," or edit an existing template, you begin in the library.

1. Navigate to the HotDocs library window, open a HotDocs library.

2. From the library toolbar, you can complete any of the following tasks:
   - Create a **New Template**
   - **Edit** an existing template or clause library
   - Click **Add Item** to add a template or other file to the library
   - Click **Remove Item** to remove a template or other file from the library (select the item first)
   - **Assemble** a document

Creating a New Text Template

The first step in automating a HotDocs text template is to create a new template file that contains your document text.

1. In the HotDocs library window, click the folder where you want to place the new template.

2. Click **New Template**. The **New Template** dialog box appears.

3. From the **Type** drop-down list, select the type of text template you want to create.

4. In the **File name** box, type a file name.

5. In the **Title** box, type a title for the template (or accept the suggestion HotDocs makes). The title is what appears in the library.

6. Optionally, in the **Description** box, type a description of your new template.

7. Select the contents for the new template using one of the following options:
   - **Empty**—creates an empty template file; you can type or copy and paste text into your template later
   - **Current open word processor document**—copies the contents of the currently open word processor file into the new template
   - **Browse**—enables you to browse to and then copy the contents of some other file (for example, a word processor file or another template file) into the new template

8. From the **New Template** dialog box, click **OK**. HotDocs opens your selected word processor and displays the new template.

> **Note**
>
> To edit an existing template, select the template and click 📝 **Edit**.

Inserting a Variable in the Template

To insert a variable in your template text, you can select a portion of the changeable text in the template (such as a name, date, number, and so forth) and replace that text with a variable field.

To replace template text with a variable

1. With the document open in your word processor, select the text you want to replace and click the «» **Variable Field** button. The **Variable Field** dialog box appears.

2. Select the type of variable you want to insert. Your options include **Text**, **Number**, **Date**, **True/False**, **Multiple Choice**, and **Computation**.

3. In the **Variable** box, type a variable name.

4. Optionally, clear **Use defaults** and from the **Format** drop-down list, select an example format.

5. To modify the variable's properties, click the 🖌 **Edit Component** button. When finished making changes, click **OK**. The **Variable Field** dialog box appears again.

6. Click either **Replace Once** or **Replace Multiple**.

7. If you selected **Replace Multiple**, the **Find and Replace** dialog box appears where you can click the appropriate replacement option: **Replace**, **Replace All**, or **Find Next**. HotDocs replaces the text.

> **Note**
>
> To insert a variable without replacing text, simply place your cursor where you want the variable and click the «» **Variable Field** button. Then follow the steps outlined above.

Assembling a Document

You assemble a document by selecting a template and then answering the questions in the interview. When you assemble a document, HotDocs merges your answers with the unchanging text in the template to produce the final the document. Once HotDocs assembles the final document, you can view, print, or save the document.

To assemble a document

1. At the HotDocs library window, select a template.

2. Click 📋 **Assemble**. The **Answer File** dialog box appears.

3. Select an answer file, then click **OK**. The assembly window appears, showing the interview outline and the first information-gathering dialog.

4. Answer the questions in each dialog, clicking ▶ **Next** to advance to each new dialog.

5. After the final dialog, the **End of Interview** dialog identifies how many questions remain unanswered. This dialog also provides options for working with the assembled document.

The Interview Outline Icons

The interview outline to the left of the interview indicates the status of questions in each dialog:

- ⬜ Indicates you have yet to answer any of the questions in the dialog
- ◩ Indicates you have answered at least one of the questions in the dialog
- ▤ Indicates you have answered all questions in the dialog
- ▥ Indicates that the dialog repeats, enabling you to provide more than one set of answers for that interview element
- ⊞ Indicates you can add a new set of answers to a repeating dialog
- ⊡ Indicates the dialog is required, but still unanswered
- ▭ Indicates the dialog is unreachable, as it follows a required but unanswered dialog

Other Resources for Learning to Use HotDocs

HotDocs Tutorials

Included on the installation CD is a copy of the HotDocs Tutorials, which cover the basics of template automation and assembly. The lessons are structured such that you can complete them individually. Alternatively, you can download the tutorial guide here: http://help.hotdocs.com/desktop.htm.

HotDocs Helps

HotDocs includes a comprehensive help file to help you learn to use the software. To access this help file, choose 🔵 **HotDocs Help** from any **Help** menu within HotDocs, or open the help file here: http://help.hotdocs.com/desktop.htm.

Other HotDocs Documentation Resources

When visiting the HotDocs help website, you can also:

- Download additional tutorials that cover more advanced features of HotDocs
- Explore the other HotDocs documentation resources such as:
  - HotDocs Resource Center
  - HotDocs Wiki
  - HotDocs Forum
  - HotDocs Software Updates

Help For Using HotDocs

HotDocs Help Window

HotDocs includes a help file to assist you in using the product.

------ **Note** ---
The HotDocs Help window is divided into three parts—the navigation bar along the top
of the help window, the main help content pane, and the topic navigation path that
appears along the bottom of the window (which is visible as you are viewing specific
help topics). As you view individual help topics, related topics are displayed in the
right-hand navigation bar.

Organization of the Help File

Some contents within the help file are categorized by the type of information available:

1. **Introduction** (or **Overview**): These topics describe, in general terms, a particular feature or tool of HotDocs.

2. **At a Glance:** These topics provide information for a specific dialog box or window. (You can directly access these help topics by clicking the ⓘ **Help** button on the toolbar or the **Help** button at the top of a dialog box.

Finding Topics in the Help File

To use the help file, you have several options:

- Click the **Contents** tab in the navigation bar to view the main table of contents for the help file. You can click a folder and navigate to the specific help topic that most interests you.
- Click on the **Search tab** () and type a search term or phrase in the **Search** box and press the ENTER key to view topics that contain your search phrase. If the search phrase is found, a **Search Results** page is displayed, showing the different topics, grouped by category, that meet your criteria.
- Click the **Index** tab to view a listing of topics in the help file, referenced by index keyword.
- Click the **Glossary** tab to search for the definition of a specific HotDocs term.

Forming a Help Search Query

Using Search is perhaps the most powerful option you have for searching the help file. To form a search query, please keep the following in mind:

- If you want to find a topic that contains two or more terms, regardless of where the terms appear in the topic, type those terms in the search box. For example, if you want to find a topic on using the instant update feature for a document, you could type the search words *instant update document*. All topics that contain all of those search terms are listed in the results.

- To search for a specific phrase, you can surround the phrase in quotation marks. For example, to find information about the **Highlight Fields** button, type the search phrase (including quotation marks) *"highlight fields button"*. All topics with that exact phrase are listed on the **Search Results** page.

- You can also search using capitalized Boolean phrases such as **AND**, **OR**, and **NOT**:

  — Words separated by **AND** display results that contain all of the words in your search. (This is the way Search works by default.)

  — Words separated by **OR** display results that contain either of the words in your search. (For example, you could search using *"intake interview" OR "interview template"* and view all topics that contain either of those phrases.

  — Words separated by **NOT** display results that contain the first word in the search, but not the second. For example, if you want to find all topics that contain the word *group* but not *table*, you could type the search phrase *group NOT table*.

Other Help Resources

- Click [icon] **Hide** to hide the navigation tabs and [icon] **Show** to show them.

- Click [icon] **Back** to return to the previous topic.

- Click [icon] **Print** to open the **Print** dialog box and print a copy of the current page.

- Click [icon] **Options** to view the Options drop-down menu where you can choose from: **Hide**, **Tabs**, **Back**, **Forward**, **Home**, **Stop**, **Refresh**, **Internet Options**, **Print**, and Search Highlights **Off/On**.

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Contacting HotDocs

Customer Service

Experienced HotDocs consultants are available to help you with a variety of services, including integrating HotDocs with other products, building a template library, or providing training. Please contact us using any of the following methods.

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Contacting Technical Support

Technical Support specialists are available 24 hours a day, seven days a week to help you use HotDocs. If you are having difficulty installing or using the software, or if you encounter an error message, please contact a technical support representative at (800) 828-8328 (US) or 0843 208 0704(UK).

Providing Documentation Feedback

To improve the quality of the tutorials and the help files, we invite you to make comments or suggestions. When doing so, please include as much information about your experience using the documentation as possible. For example, include which version of the product you are using, as well as whether your suggestion is in regards to the printed *HotDocs Installation Guide and Tutorial* or the electronic help file. If commenting about a specific topic, include that information as well.

--- **Note** --

Please keep in mind that we cannot respond to technical support or project consulting issues. We are mainly interested in problems with the documentation itself—such as erroneous information, grammatical and spelling errors, or suggestions for topics to include in the next release of the software.

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