

HotDocs Player Help File

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Getting Started

Common Confusions

In HotDocs there are some features which, while working as expected, may at first seem counter intuitive. The following is a list of common confusions and known issues:

See the [Troubleshooting](#) section of this help file to resolve other issues you encounter.

Document Assembly

Problems with Text Pushing Too Far to the Left Side of the Assembled Document

Templates developed in Word 2007 with [smart tags](#) enabled can display text incorrectly. This results from a bug in [Microsoft's Open XML Format SDK](#). If you have templates automated from documents developed in Word 2007, be sure to remove the smart tags in your templates or ask your template developer to resolve this problem.

Enabling Update table of contents, references, fields etc in HotDocs Server templates

On the HotDocs Server tab of Component File Properties, if you enable **Update table of contents, references, fields, etc** option, you may find that it does not produce exactly the same results as the desktop option of the same name on the Assembly tab. Unlike in desktop HotDocs, using this feature with server is known to occasionally alter or lose advanced formatting features in the assembled document. Not enabling this feature removes the chance of this error occurring but you lose the ability to dynamically update the table of contents, references, fields etc in the interview. If you choose to use this feature when converting a template for use with HotDocs server, we recommend testing all features that previously relied on the desktop version of this option.

Using the /nw Command-line Switch with the /of Switch Does Not Support Converting a Document to PDF

Normally, the file extension on the file specified in the /of command line switch instructs HotDocs to convert the assembled document to a file of that type after assembly. However, when converting to PDF, this only works when the assembly window is visible. When you hide the assembly window (by using the [/nw switch](#)), conversion to a PDF document is not supported. HotDocs does, however, save the assembled document to a file with a .PDF extension as instructed by the /of command line switch. This can be confusing if you specify "*tf=template.docx /of=document.pdf*" in the command line after using a /nw switch. In this case, HotDocs assembles a DOCX document from the DOCX template, but saves the DOCX document in the file system with the filename specified by the /of switch (document.pdf). If you then double-click that file in Windows Explorer, the application mapped to the PDF file extension (usually Adobe Reader) tries to open the file but fails because the file contains a DOCX document, not a PDF document (as the file extension claims).

In cases where the assembly window is hidden by specifying the /nw switch, only native word processor file types are supported for the /of commandline switch, as follows:

Template type	Allowed output file
DOCX	DOCX
RTF	RTF, DOCX
DOT	RTF, DOCX

Work Around

A possible work around is to use Microsoft Word's PDF conversion feature to accomplish the same result, using either Word's graphical user or programming interface.

Known Issues

The following issues are known and are either not addressable by HotDocs as they originate in external software or are planned to be resolved the future releases. In the meantime you can use the workarounds listed below:

Browser Interviews

- In a Javascript interview, selecting "None of the above" on a list style multiple choice question in the interview, occasionally does not clear any other selected options. You need to hold down Ctrl and click the selected options to clear them and then you can select "None of the above" only.

Quick Help Links

Using the links below, you can quickly find topics of interest, particularly if you are a new user.

- [New and Enhanced Features of HotDocs 11](#)
- [Get Help Using HotDocs](#)

Starting HotDocs

- [HotDocs Overview](#)
- [Start HotDocs](#)
- [Introduction: Use HotDocs Libraries](#)
- [Create a Library](#)

- [Work with Templates and Other Files in a Library](#)

Assembling a Document

- [Assemble a Text or Form Document](#)
- [Select an Answer File for Assembly](#)
- [Navigate Through Answer-Gathering Dialogs](#)
- [Preview the Assembled Text Document](#)
- [Save an Assembled Text or Form Document](#)
- [Save an Answer File During Assembly](#)

What's New in HotDocs Developer?

New and Enhanced Features of HotDocs 11

New and Enhanced Features of HotDocs 11.2

Compatibility with Microsoft Word 2016

You can now use templates compatible with the latest version of Microsoft Word.

[HotDocs 11.2](#) is a paid upgrade and license codes from earlier versions are not compatible. If you want to upgrade to [HotDocs 11.2](#) you need to contact your [HotDocs representative](#).

New and Enhanced Features of HotDocs 11.1

WordPerfect X7 Support

You can now build and use templates compatible with the latest release of WordPerfect. Note, though, that HotDocs no longer supports WordPerfect 12.

New and Enhanced Features of HotDocs 11

Word processor support

HotDocs 11 now supports Microsoft Word 2013 and WordPerfect X6.

It no longer supports Microsoft Word 2000 and XP or WordPerfect 8,9,10, and 11.

New support for DOCX file format



HotDocs now supports DOCX format templates with no file conversion throughout, allowing HotDocs to better utilize the native properties of Microsoft Word, reducing any unexpected errors in assembly and avoiding unmanageably large file sizes. HotDocs will still support all RTF templates.

New support for Plain Text Templates

In addition to word processor based templates, HotDocs now supports Plain Text Templates (.txt files). The finished document can be sent to your default text editor.

Help System Re-structure

Removal of the What's This help feature: The **What's This** help buttons have been removed from HotDocs windows and dialogs.

Window Specific Help File Pages: The **What's This** help buttons have been replaced with a new buttons  and  which will open the relevant *At a Glance* window or dialog box page from the HotDocs help file.

Re-structure of the HotDocs Help File: The HotDocs Help File has undergone a change to the style and structure of the table of contents. There has been improvements made to the search function, index and glossary as well as the introduction of new *At a Glance* pages, where you can see the main features of HotDocs dialog boxes and windows. In the new help file *Introduction* pages are also now listed as *Introduction* pages.

Additional Improvements

In addition to the new features above, this release of HotDocs contains software corrections and minor enhancements to existing features.

New and Enhanced Features of HotDocs 10

New and Enhanced Features of HotDocs 10.2

This release of HotDocs contains software corrections and minor enhancements to existing features.

New and Enhanced Features of HotDocs 10.1

This release of HotDocs contains software corrections and minor enhancements to existing features.

New and Enhanced Features of HotDocs 10 HF3

This release of HotDocs contains software corrections and minor enhancements to existing features.

New and Enhanced Features of HotDocs 10 HF2

This release of HotDocs contains software corrections and minor enhancements to existing features.

New and Enhanced Features of HotDocs 10

Edition Name Changes

HotDocs is now available in four different editions:

New Name	Previous Name
Developer	Professional
Developer LE	Standard
User	
Player	Player

Interviews

Interviews have been updated and improved for HotDocs 10.

Changes to Files and Folders

HotDocs Files

New File Name	Previous File Name
hotdocs.exe	hotdocs6.exe

HotDocs Default Installation Folder

New Folder	Previous Folder
C:\Program Files\HotDocs	C:\Program Files\HotDocs 6

Installing HotDocs

Installing HotDocs: Quick Start

Please see the installation information in the [HotDocs User Quick Start Guide](#).

Becoming Familiar with HotDocs

HotDocs Overview

HotDocs is a suite of award-winning software applications that significantly reduce the time you need to spend generating client or customer specific documents (such as contracts, sales proposals, government and court forms, loan applications, and medical forms).

HotDocs' document generation software solutions form an array of products, environments, and platforms that enables users across a wide variety of work situations to take advantage of HotDocs' automated customization capabilities.

Using HotDocs, you can transform any word processor file or form into an interactive template by replacing the changeable text with HotDocs variables. Then, the next time you want to generate a completed document, just 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.

When using HotDocs, you can perfect a template, minimizing the "human error" factor that repetitive typing introduces. Additionally, you can automate your templates so that verb tenses, gender references, dates, numbers, calculations, and more are updated automatically as users enter information. Custom interview questions and help resources guide you or your users through the interview.

Virtually any document in your workflow can be converted to a HotDocs template. HotDocs templates then become your gold standard—experienced colleagues can share their knowledge, and new colleagues come up to speed faster. Using HotDocs, you can compile an invaluable repository of special language, unique clauses or terms, correspondence, and more.

This document provides an overview of:

HotDocs Document Generation Workflow

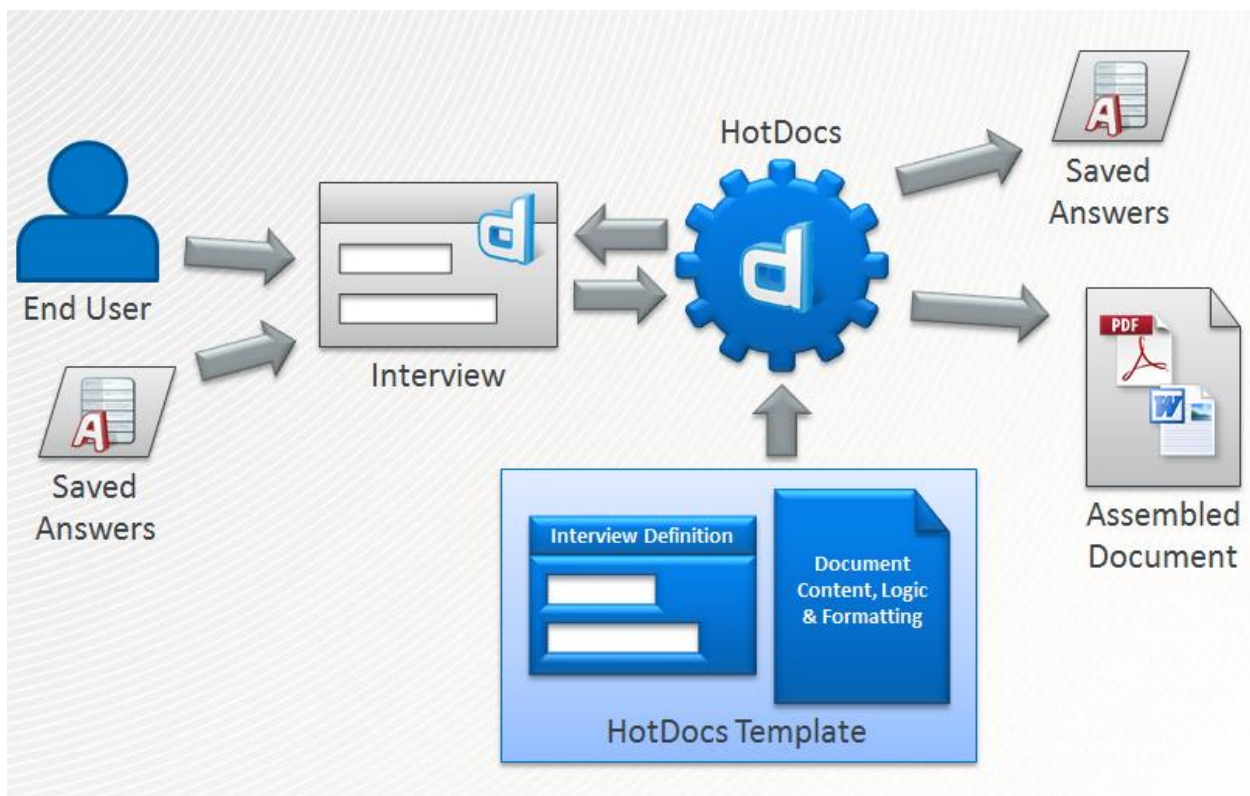
HotDocs document generation follows the following workflow:

1. You (or another [template developer](#)) use HotDocs software products and systems to produce a generic exemplar document known as a [template](#). (You can do this most easily by replacing an existing document's changeable text—text that varies from one client to another, such as names, dates, and institutions—with HotDocs [variables](#)).
2. You tell HotDocs to use the template you create to generate an interactive [interview](#) that asks your end user (a client or customer) for the data HotDocs needs to create a customized document.

3. HotDocs presents the interview to your end user either in a [desktop](#) product, or in a browser.
4. Your end user steps through the interview, providing the information you request at the prompts you set up in the template's [dialogs](#).
5. HotDocs stores this information in an [answer file](#).
6. When your user finishes the interview, HotDocs assembles a final document by merging the information in the answer file with the non-changing text in the template.

HotDocs can also use existing answer files to supply an interview with commonly reused information (for example, a company's address and contact information).

The workflow diagram below shows HotDocs' capability to use both answer files (saved answers) and end user input to provide information in an interview. The diagram also shows that HotDocs can generate an answer file or an assembled document by merging the template text with the answers from the completed interview.



HotDocs Document Generation Workflow

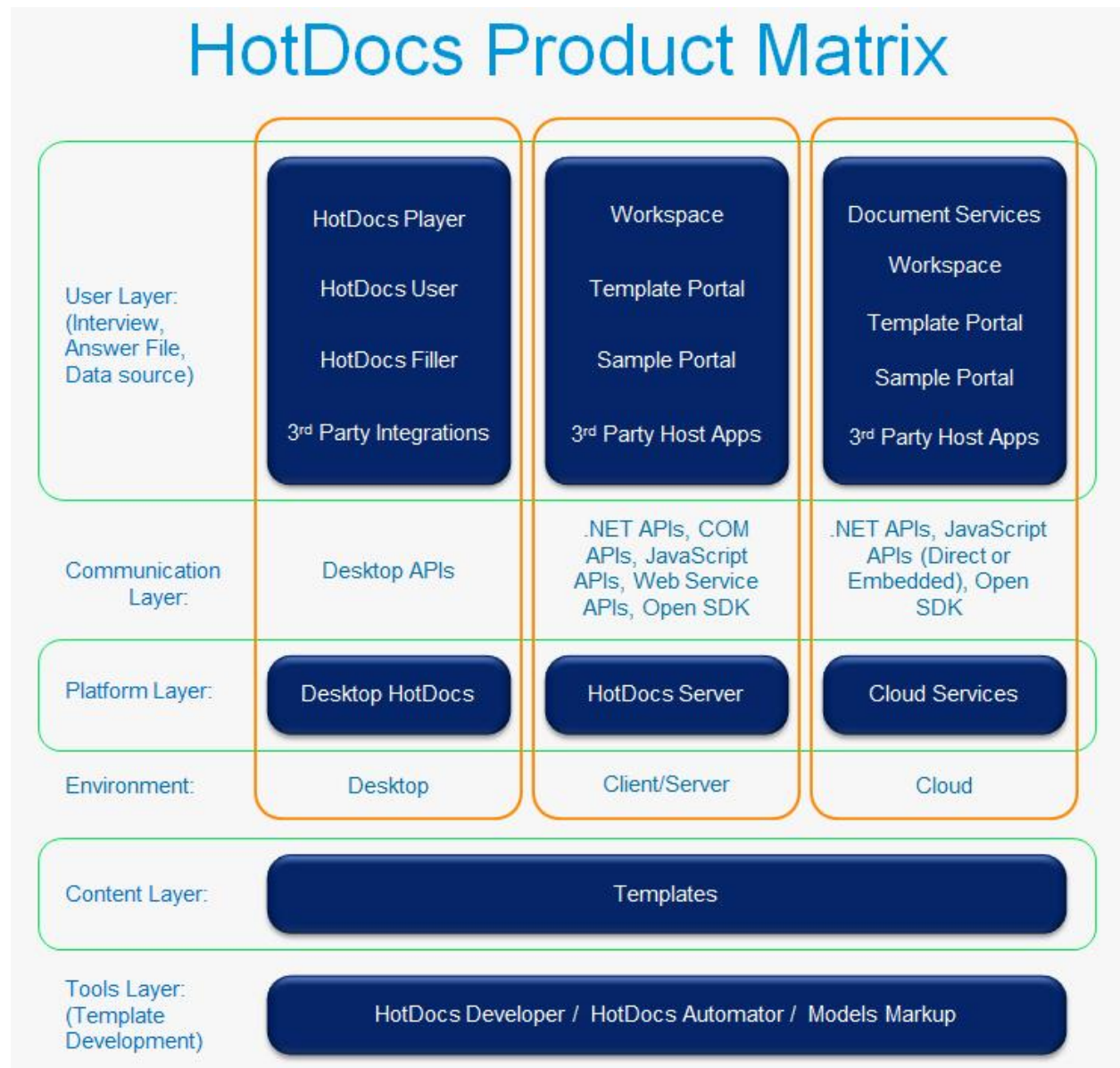
Using HotDocs, you can perfect a template, minimizing the "human error" factor that repetitive typing introduces. Additionally, you can automate templates so that verb tenses, gender references, dates, numbers, calculations, and more, update automatically as users enter information. Custom interview questions and help resources guide you or your users through the interview.

You can convert virtually any transactional document in your business to a HotDocs template. HotDocs templates then become your standard for document generation—experienced colleagues can share their knowledge, and new colleagues come up to speed faster. Using HotDocs, you can compile an invaluable repository of special language, unique clauses or terms, correspondence, and more.

HotDocs Product Matrix

HotDocs provides the products described in the product matrix below to enable you to accomplish the steps of the HotDocs document generation workflow described above. Which product or products you use to accomplish the steps depends on your particular computing circumstances and needs. You can gain a better understanding of a particular product or feature by locating it within the conceptual areas which define the matrix:

- [Tools layer](#) (template development)
- [Content layer](#) (completed templates containing non-changeable text and HotDocs variables)
- [Environment](#) (desktop, client/server, or cloud computing)
- [Platform layer](#) (desktop HotDocs products, HotDocs Server, or HotDocs Cloud Services)
- [Communication layer](#) (communications protocols)
- [User layer](#) (information gathering and final document generation)



HotDocs Product Matrix

Tools Layer

The tools layer of the HotDocs product suite is the area you use to create a HotDocs template. The tools layer consists of the following:

- HotDocs Developer—a desktop application that enables a template developer to transform a word processor file into a HotDocs template by replacing the document's changeable text with HotDocs variables

HotDocs Developer LE is also available for those creating word processor-based templates without using scripting, and for those not interested in publishing their templates for others to use.

- HotDocs Automator—an aspect of HotDocs Developer that enables a template developer to transform a graphical form into an interactive template by replacing the form's changeable text with HotDocs variables
- [Models markup](#)—a simple HotDocs [document markup notation](#) system that provides non-HotDocs [domain experts](#) a means to mark up or edit a word processor document so that HotDocs Developer can transform the marked up document into a HotDocs template

Content Layer

HotDocs templates form the content layer of HotDocs. A completed template acts as a generic or exemplar document you can use as the basis for drafting documents of the same type for various specific clients. To change the template to a client specific document, HotDocs needs to gather user information and then merge that information with the non-changeable text in your template.

Environment

To accomplish the task of gathering the user information needed to assemble a final document, HotDocs' product suite includes data-gathering solutions for three separate computing environments:

- [Desktop](#)
- [Client/Server](#)
- [Cloud](#)

These environments serve as metaphors for specific software platforms that enable HotDocs to deliver data-gathering and document assembly functionality to end-users, regardless of their local computing configurations.

Platform Layer

HotDocs provides software solutions in the desktop, client/server, and cloud environments to collect client data and assemble client specific documents. These solutions form three independent but interrelated [computing platforms](#) for gathering and processing your clients' data to produce custom documents.

HotDocs provides three platform choices in the platform layer:

- [Desktop HotDocs Platform](#)
- [HotDocs Server Platform](#)
- [Cloud Services Platform](#)

You can use products from each of these platforms in any combination that enables you to meet both your and your clients' needs.

Desktop HotDocs Platform

HotDocs Player Help File

The Desktop HotDocs Platform is not a product; rather, as the name implies, the desktop platform consists of products and communication protocols that you and your clients install on regular desktop computers or laptops.

The base product for the desktop platform is HotDocs Developer or **HotDocs Developer LE**. HotDocs Developer enables you to create text-based templates using either Microsoft® Word or Corel® WordPerfect®. You can also use HotDocs Developer to create a graphic-based form template. HotDocs Developer LE provides the same basic template creation ability as HotDocs Developer, but does not contain certain advanced features available in HotDocs Developer, such as dialog scripting and answer file linking.

In addition to creating templates, you can also generate interviews using HotDocs Developer (and answer interview questions yourself). However, your end-users in the desktop platform area usually use one of the products in the [User Layer](#) of the product matrix to answer interview questions.

HotDocs Server Platform

HotDocs Server is the name, both of the platform, and of the base software product upon which the platform depends. In contrast to the desktop HotDocs platform, the HotDocs Server platform requires a client/server configuration with a dedicated server to run HotDocs Server and a separate client interface (in the [User Layer](#) of the platform) for displaying interviews to your end users. HotDocs Server is the server-based version of HotDocs that enables you to use a standard web browser to generate and display interviews and, using the answers from the interview, assemble your end-user's final customized documents.

Cloud Services Platform

HotDocs Cloud Services is the name, both of the platform, and of the base software product upon which the platform depends. In contrast to the HotDocs Server platform, the Cloud Services platform does not require you to install any HotDocs software. The advantage of the cloud environment is that it frees firms from needing to install and maintain server software (or for that matter, any client software in the [User Layer](#)). Instead, Cloud Services exists as a HotDocs-provided service to which any third-party can make web service calls to provide their end-users access to HotDocs generated interviews, and to deliver to those same end-users their final documents.

Communication Layer

The communication layer of the product matrix consists of the communications protocols which enable interactions between the User layer and the parts of the HotDocs system that make up the platform layer of the HotDocs product matrix. These communications are necessary to present interviews to end users to gather the information needed to assemble final client-specific documents. The communication protocols used vary with the platform.

Desktop Environment

In the desktop paradigm, the [Desktop API](#) is the communication model you use if you want to integrate HotDocs functionality into your own, or third-party, applications. A typical use includes passing data from

a third party database into HotDocs. You can also use the [plug-in API](#) to, for example, add new menu items to the HotDocs Developer library window.

HotDocs Server Environment

The HotDocs Server Platform enables you to choose several modes for communicating between HotDocs Server and your client application (a HotDocs Server **host application**):

- [HotDocs Server .NET API](#)—a set of native .NET classes that wrap COM functionality; these enable communication between HotDocs Server and [HotDocs Server host applications](#) on the ASP.NET framework
- [HotDocs Server COM API](#)—Provides a set of COM objects that enable communications between HotDocs Server and HotDocs Server host applications
- [HotDocs Server JavaScript API](#)—Enables you to directly integrate a browser interview in your HotDocs Server host application web page by providing direct and synchronous communication with the interview runtime (which must either be loaded in the same frame, or have the same domain name loaded by the interview frame)
- [HotDocs Server Web Service API](#)—Enables communication between HotDocs Server and a HotDocs Server host application (using [web services](#))
- [HotDocs Open SDK](#)—An open source communication protocol for HotDocs Server or HotDocs Cloud Services; many Open SDK API calls receive quicker responses than those in the alternative communication protocols above

Cloud Services Environment

- [HotDocs Cloud Services .Net API](#)—a set of native .NET classes that enable communication between HotDocs Cloud Services and [HotDocs Cloud Services host applications](#) using the [ASP.NET framework](#)
- [HotDocs Cloud Services Direct JavaScript API](#)—Enables you to directly integrate a browser interview in your HotDocs Cloud Services host application web page by providing direct and synchronous communication with the interview runtime (which must either be loaded in the same frame, or have the same domain name loaded by the interview frame)
- [HotDocs Cloud Services Embedded JavaScript API](#)—Enables you to place HotDocs interview functionality within an IFRAME in your HotDocs Cloud Services host application web page and use the EasyXDM library for asynchronous communication between Cloud Services and the interview in a cross-domain-safe manner
- [HotDocs Open SDK](#)—An open source communication protocol for HotDocs Server or HotDocs Cloud Services; many Open SDK API calls receive quicker responses than those in the alternative communication protocols above

User Layer

The user layer of the HotDocs product matrix is where the work of presenting an interview to a user, then collecting user information in an answer file occurs. Once collected, HotDocs can use the answers (or access answers previously stored in third-party data sources) and the non-changing text in the template

to assemble the final client-specific document. The products and solutions for accomplishing these tasks vary with the platform.

Desktop Environment

The desktop platform provides the following products in the user layer:

- [HotDocs User](#)—enables you or your end users to complete interviews and [assemble](#) text documents from existing HotDocs templates
- [HotDocs Player](#)—a more basic version of HotDocs user that enables you or your end users to complete interviews and assemble text documents from existing HotDocs templates
- [HotDocs Filler](#)—enables you or your end users to complete interviews and assemble documents from existing HotDocs form templates
- Third party integrations—enable you or your end users to complete interviews and assemble text and form documents with HotDocs functionality provided through the [Desktop HotDocs API](#).

HotDocs Server Environment

The HotDocs Server platform provides several HotDocs-created examples of the host application you need to give your end-users access to HotDocs interviews. Many customers prefer to build their own host applications to customize their users' experience. The following solutions are available:

- [HotDocs Workspace](#)—a host application available from HotDocs that enables you or your end users to complete interviews and assemble documents within a web browser; available for use with HotDocs Server and HotDocs Cloud Services; uses a SQL backend to store metadata about uploaded templates
- [HotDocs Template Portal](#)—a host application available from HotDocs that enables you or your end users to complete interviews and assemble documents within a web browser; available for use with HotDocs Server and HotDocs Cloud Services; uses a SQL backend to store metadata about uploaded templates
- [HotDocs Sample Portal](#)—a sample host application designed to show how to build a custom host application for working with HotDocs Server or HotDocs Cloud Services
- [Third party host applications](#)—enable you or your end users to complete interviews and assemble text and form documents with HotDocs functionality provided through the various APIs delineated in the [Communication layer](#)

Cloud Services Environment

The HotDocs Cloud Services platform provides several HotDocs-created examples of the host application you need to give your end-users access to HotDocs interviews. Many customers prefer to build their own host applications to customize their users' experience. The following solutions are available:

- [Document Services](#)—a HotDocs Software-as-a-Service (SaaS) host application

- [HotDocs Market](#)—an ecommerce platform offering expertly crafted HotDocs templates published by bar associations and other legal industry experts.
- HotDocs Workspace—a host application available from HotDocs that enables you or your end users to complete interviews and assemble documents within a web browser; available for use with HotDocs Server and HotDocs Cloud Services
- HotDocs Sample Portal—a sample host application designed to show how to build a custom host application for working with HotDocs Server or HotDocs Cloud Services
- [Third party host applications](#)—enable you or your end users to complete interviews and assemble text and form documents with HotDocs functionality provided through the various APIs delineated in the Communication layer

List HotDocs File Name Extensions

The following is a list of all file types used by HotDocs:

File Name Extension	Type of File
.DOCX	Word DOCX Template/ Word Document
.RTF	Word RTF Template
.DOT	Word Template
.WPT	WordPerfect Template
.TTX	Plain Text Template
.HFT	HotDocs Envoy-based Form Template
.HPT	HotDocs PDF-based Form Template
.HFD	HotDocs Envoy-based Form Document
.HPD	HotDocs PDF-based Form Document
.DOC	Word Document
.WPD	WordPerfect Document
.CMP	HotDocs Component File
.CMP	HotDocs Interview Template
.HDL	HotDocs Template Library
.HDL	HotDocs Clause Library
.HCL	HotDocs Clause Archive

.HDA	HotDocs Auto-Assemble File
.HDI	HotDocs Auto-Install File
.HAL/.HDL	<p>HotDocs Answer Library</p> <p>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). By default, HotDocs will continue to use binary answer libraries as long as the file properties of items in the library use characters that are compatible with your system's default language. If you define answer file properties that contain foreign characters, HotDocs will create an XML-based answer library (so that it can properly display these characters in the Properties tab of the library window.)</p>
.ANS/.ANX	<p>HotDocs Answer File</p> <p>HotDocs 6 through HotDocs 2008 supported two types of answer files—binary answer files and XML answer files. These files were typically named using the .ANS and .ANX file name extensions, respectively. Starting with the release of HotDocs 2009, however, HotDocs can save answer files in only XML format. This means that if you open a binary answer file (such as an .ANS file) in HotDocs 2009, make a change to the file, and then save it, the contents of the answer file will be converted to and saved as XML. (The file name, however, will continue to use the ANS file name extension.) If you want the answer file to be compatible with versions of HotDocs prior to HotDocs 2009, see Compatibility of HotDocs 11 Files with Earlier Versions of HotDocs.</p>
.HDPMX	Publisher Answer Source Mapping File (This file is used to save variable mapping information created and used by other third-party applications.)
.HDUMX	User Answer Source Mapping File (This file is used to save variable mapping information created and used by other third-party applications.)

Using the Keyboard in HotDocs

Use the Keyboard to Work in HotDocs

You can use the keyboard to complete many tasks in HotDocs. The following describes some of these keyboard options.

The options described below refer to using a standard U.S. keyboard. Commands that require you to press two keys simultaneously are displayed using a plus (+) character. For example, to describe the **Print** command, the keyboard shortcut would appear as **Ctrl+P**.

There are four ways you can use the keyboard to work in HotDocs:

Tab Between the Elements in a Window, dialog box

Press the **Tab** key to move between the different elements of a HotDocs window or dialog box. Similarly, press **Shift+Tab** to move through the different elements in reverse order.

If certain elements don't appear in the tab order, use one of the other methods described in this topic, such as use an accelerator key.

For example, if you're viewing the template library and you want to assemble a document, you can press the **Tab** key to move focus to the item list of the library. Then press the **Up Arrow** or **Down Arrow** key to move between items in the library. Once the template you want to assemble is selected, press **Alt+M** (to view the **Template** menu). Finally, either press the **Down Arrow** key to select **Assemble** from the menu, or press the **A** key to activate the accelerator key in the **Assemble** command. The assembly window appears.


Use Accelerator Keys


Many commands and options in HotDocs can be accessed using an accelerator key. Accelerators appear as underlined letters in a command name or prompt. To access them, press the **Alt** key while also pressing the underlined letter. If you aren't in a text field (or a field where you can enter or select text), you can simply press the underlined letter and HotDocs will move you to that element or command.

For example, to save an answer file during an interview, at the assembly window, press **Alt+F**. The **File** menu appears. Then press **S**. The **Save Answer File** dialog box appears.

For some Windows 2000 and XP users, accelerator keys aren't identified until the **Alt** key is pressed. To always view accelerator keys, go to **Start menu > Settings > Control Panel > Display**. Click the **Advanced** tab, and then click **Effects**. Clear **Hide underlined letters for keyboard navigation until I press the Alt key**. To always view accelerator keys on Windows Vista, go to **Control Panel > Ease of Access > Ease of Access Center > Make the keyboard easier to use** and select **Underline keyboard shortcuts and access keys**.

Use the Shortcut Menu

When working with specific elements in a window or dialog, you can frequently access a list of commands for that element by displaying the shortcut menu. To access the shortcut menu, place focus on the element and then either press the  **Windows Application** key on your Windows keyboard, or press **Shift+F10**. Use the arrow keys to move between options in the menu.

For example, to view where the answer to a specific question is used in the assembled document, while your cursor is in an answer field, press the  **Windows Application** key on your keyboard. (Or, press **Shift+F10**.) A shortcut menu appears. Then, either press the **Down Arrow** key to select **Go to Answer in Document** (and then press **Enter**), or press the **G** key to issue the command.

To close a shortcut menu without choosing an option in it, press the **Esc** key.

Use Shortcut Keys

Several commands within HotDocs can be accessed using a shortcut key, which is a key or a combination of keys you can press that will quickly execute the command. (Accelerator keys can be considered shortcut keys.)

For example, to send an assembled document to the word processor, press the **F11** key. Or, to move between the different tabs of the assembly window, press **Ctrl+Tab**. (Pressing **Ctrl+Shift+Tab** moves through the tabs in reverse order.)

Click [here](#) for a complete list of shortcut keys.

Full List of Keyboard Shortcuts

You can use keyboard shortcuts to complete many tasks in HotDocs. A keyboard shortcut is a key or a combination of keys you can press that will quickly execute the command.

For example, to send an assembled document to the word processor, press the **F11** key. Or, to move between the different tabs of the assembly window, press **Ctrl+Tab**. (Pressing **Ctrl+Shift+Tab** moves through the tabs in reverse order.)

Click one of the links below to see the keyboard shortcuts for that specific part of HotDocs:

- [Keyboard Shortcuts at Template Library](#)
- [Keyboard Shortcuts for the Interview Tab of the Assembly Window](#)
- [Keyboard Shortcuts for the Document Preview Tab of the Assembly Window](#)
- [Keyboard Shortcuts for the Form Document Tab of the Assembly Window](#)
- [Keyboard Shortcuts for a Clause Library at the Assembly Window](#)
- [Keyboard Shortcuts for Answer File Manager](#)
- [General Keyboard Shortcuts](#)
- [Keyboard Shortcuts for JavaScript Interviews](#)
- [Keyboard Shortcuts for Silverlight Interviews](#)

Template Development Workflow

HotDocs Templates Overview

A HotDocs [template](#) is a software component created using HotDocs Developer. The template contains all of the document's boilerplate text (the parts of the document which remain the same every time the document is generated), the [variable](#) fields (which will be replaced with new information collected during the interview), and any template logic needed (this can be repeated fields, conditional paragraphs, inserted templates etc.). The HotDocs template and the paired HotDocs [component file](#) (generated by HotDocs alongside the template) contain all the information necessary to produce multiple documents with the information gathered in a HotDocs interview.

A HotDocs Template encapsulates three important things:

- **Natively formatted content.** For example, a HotDocs Template can be created right in Word; most of Word's formatting and document features can be built right into the HotDocs template. The documents you generate from such a template are native Word documents; no conversion or reformatting is necessary.
- **Embedded Document logic.** HotDocs embeds the business logic necessary to produce correct documents right inside your template. Computed values, conditional logic, specialized formatting, lists or tables of arbitrary length, nested lists, etc... all the know-how necessary to draft the perfect document.
- **Data-gathering Interview.** Not only does a template contain the logic HotDocs needs to produce a customized document, it also contains a definition of exactly what data is required to do so. HotDocs uses this to create a dynamic data-gathering interview based on the template. HotDocs Interviews can gather exactly the data that is necessary, leaving out the questions that are not relevant according to what's already been answered.

Generally speaking there are three types or categories of templates:

Template Type	Description
Text Templates	<p>You create and automate a text template in a word processor, such as Microsoft Word or WordPerfect. You can modify the underlying text of a text template both as you automate the template and as you view the assembled document in the word processor. Text templates have a .DOCX, .RTF, .DOT, .WPT or .TTX file name extension.</p> <p>Microsoft Word .DOT templates cannot be used with HotDocs Server.</p>
Form Templates	<p>A form template is based on static graphical or text content, such as a PDF document. You place variable fields directly on top of the static content so that during the document assembly process, HotDocs can overlay answers on top of the static text. When you answers are merged with the static document content, the underlying static text and formatting does not change. Form templates have a .HFT or .HPT file name extension.</p>

Interview Templates

An [interview template](#) gathers specific information (such as court, attorney, or client information). HotDocs saves the answers your end users provide for use in assembling documents; however, unlike text and form templates, HotDocs does not generate a document directly from an interview template. The only direct output of an interview template is an answer file. However, starting with an interview template, HotDocs can trigger subsequent assembly of additional documents using the ASSEMBLE instruction. Interview templates have a [.CMP](#) file name extension.

When you create a new template file, HotDocs creates a companion file called the [component file](#). The component file contains information about variables and other [components](#) used in the template. The component file has the same base file name as the template file, but with a .CMP file name extension. Both the template file and the component file are necessary for a template to work. Whenever you [copy a HotDocs template](#)—for example, to share a template with another user—you must be sure to copy both the template file and the component file.

The component file works in the background—as you create various components in the template, HotDocs stores the component file. Normally, each template uses its own component file, but you can make two or more templates share one component file.

Interview templates consist of only a component file; they do not have a separate template file.

Templates used with HotDocs Server also require an additional file: the template manifest (.manifest.xml). Like a component file, this file also shares the same base file name as the template except for the file name extension. It is created when you publish a template for use with HotDocs Server.

Versions of HotDocs Developer prior to 11 uploaded JavaScript (.JS) and Variable Collection (.HVC) files when publishing content for use with HotDocs Server. These files are no longer of concern when working with HotDocs Server version 11 or later.

Template Relationships

Any HotDocs template can potentially refer to (and thus rely on) other templates in two ways:

- **INSERT instructions.** When one template "inserts" another, this means content and logic from the inserted template dynamically become part of the parent template. The inserted template can influence the parent template's interview (changing which questions need to be asked, for example), and the content of the inserted template becomes part of the assembled document that is produced.
- **ASSEMBLE instructions.** When one template "assembles" another, this means the assembled template is "queued up" for subsequent interview and/or assembly after the current interview or assembly has been completed by the user. This is a separate operation, but it is necessary to implement the full feature set on which HotDocs template authors generally rely for proper execution of their templates.

Plan Your HotDocs Project

Gather and Review Documents

Before you can [automate any templates](#), you must first identify which documents you want to include in a set of templates. You should gather all of these documents into one central location. Documents you should consider are those you routinely create for clients.

As you review your documents, you'll probably realize you've created the same type of document for multiple clients. While each of these documents contains generally the same content, some documents may contain unique or different paragraphs or clauses. To capitalize on the work you've already done, create a HotDocs Model where you copy all of these text variations. Then, when you automate the template, you can use HotDocs scripting to include or omit these different paragraphs, depending on the user.

Define the Audience

Another point to consider is your audience. Are you the only one who will use the automated templates, or will you share your work with others, perhaps in your firm or more broadly? If others will use the templates, how do you plan to distribute these templates to them? (Template distribution options are covered [later](#) in this document.)

As you identify your audience, you should also consider their experience in using the types of documents you are automating. If your users don't have the same understanding or experience you do with the documents, you may need to change the way the templates are automated to help them better understand the documents. For example, you may need to include additional resources to help users better understand how to answer questions in the interview.

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Mark Up the Document Set

The process of marking up a document for template automation includes identifying the text in the document that will change, depending on the person for whom the document is being created. Once identified, you indicate the variable that should replace that text. Variable information includes names, dates, numbers, and so forth.

How you mark up the document depends on your project and your needs. Following are some options:

- You can create a HotDocs Model using the HotDocs Markup Tools. Once the document is marked up, you can convert it to HotDocs template format. (See Introduction: Create HotDocs Models for details.)
- You can manually mark up word processor documents and store the markup information in a spreadsheet application, such as Excel. You can then take the marked up documents and create templates from them, referring back to the spreadsheet for specific information about how the template should be automated.
- Another option is to simply print a copy of each document in your set and mark up the documents by hand. You can write directly on the printed document what variables should be used and identify which properties should be assigned to these variables.

Regardless of which markup option you choose, you should try to address these questions in the markup:

1. How should variables be named? While it might not seem important at first, defining a naming scheme up front will save you time later when you need to manage a large list of components. For example, should you name related variables using a consistent format (like *Client Name*, *Client Address*, *Client City*, *Client State*, etc.)?
2. Which variables can be reused in other templates in the set? When templates require the same information, you should mark the variables using the same name. This way, when users save answer files after assembling a document, the answers can be used with those other documents. This saves the user from retyping common answers.
3. How should answers in the document be formatted? For example, should text answers be written using all capital letters? Should number answers be numeric (7) or spelled out (*seven*)?
4. How much information does the user need to know in order to answer certain questions during the interview? How should questions be phrased, punctuated, and capitalized? Should they contain examples of possible answers?
5. How much additional information should be included with variables? For example, when should variable resource (or help) information be included? How much is too much?
6. What other information should be known about the variables? For example, are there restrictions or limits for answers? Should an answer be formatted a certain way? If the answer must be calculated, what kind of calculation should it be? (For a complete list of properties you can assign to the different variables, see [Appendix 1: Variable Properties](#).)
7. What text in the document should be included only under certain conditions? For example, if there's a paragraph about the client's spouse, but the client isn't married, you wouldn't want to include the paragraph.

You can also mark in the document where lists of answers should be merged and where boilerplate text should be inserted. See [Appendix 2: Template Instructions](#) for details.

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Prepare to Automate the Templates

Once the templates in your set are marked up, you should think about the following things before you begin the actual automation process:

Decide if you want to share component files. If there are common variables across most of the templates, you may consider pointing each template in your set to a shared component file. Then, when you make a change to a shared component, (for example, if you change a prompt or resource text, the change will appear in all templates that use that component.) (See [Use One Component File for Multiple Templates](#).)

[It's a good idea to point all the templates that will share a component file to the shared component file before you start creating components in the templates. That way, they are saved directly in the shared component file and are ready for use when you automate other templates.](#)

Identify boilerplate text. If there is boilerplate text in the templates, consider saving that text in a separate template file and then dynamically inserting that template in each template that requires it. (Examples of boilerplate text include captions, signature blocks, and so forth.) Then, when you need to make a change to the text, you only need to make it in one file.

Create common document styles. If automating a Microsoft Word template, make good use of styles. Ultimately, this will help retain formatting throughout your templates. The Microsoft Word Help file contains a lot of useful information on using styles.

Set HotDocs Options. As you prepare to automate your templates, there may be some custom settings you want applied to all new templates you create. For example, if your templates will be used with HotDocs Server, you can specify a setting that enables all new templates you create for use with HotDocs Server.

[To view a list of settings you can change, at the HotDocs template library, choose **Options** \(**Tools** menu\) and then open the **Template Development** folder. \(See \[HotDocs Options\]\(#\)\)](#)

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Automate Your Templates

The next step in the process is to actually start automating your **templates**.

[You can find detailed instructions on each phase of this process in the HotDocs Help.](#)

Create the Template

You first begin by creating templates from the documents you marked up.

When you create a new template, you can enter a title and a description for the template. Include as much information as necessary to better identify the file. For example, if the file that's created and saved to disk uses some cryptic file naming scheme (such as *RLWHCP.docx*), you could enter a different title that makes more sense, such as *Revocation of Living Will and Health Care Proxy*. In the description you can enter as little or as much information about the template as you feel necessary.

Also, if you plan to point your templates to a shared component file, you should do so right after you create the template and before you begin any automation work. That way HotDocs will correctly save any variables and other components you create to the shared component file.

We recommend that template names are kept to less than 52 characters and don't use non-ASCII characters. .

Replace Template Text with Variables

Once the template has been created, you replace changeable text in the template with variable fields. If you've previously marked up the template, you should be using variable names and properties you defined in the markup.

As you create variables, you should test them (by clicking the **Test** button on the component editor). This shows you how the question will appear to the user. Frequently, testing helps you identify ways to improve the variable question. For example, if you're testing a Text variable that requires the user to enter a long description, you may realize you forgot to adjust the answer field height to allow for multiple lines of answer text.

Make Text Conditional

Once you have replaced all of the variable information with variable fields, you should then review the document to identify sections of text that are optional. To mark these sections, you use IF instructions. IF instructions use a True/False variable (for example, *Is the Client Married?*) to determine whether to include text or not. More complicated instructions usually require more than a simple yes/no question to determine. An example of an expression would be `IF YEARS FROM(Child's Birth Date, TODAY) <= 17.`

There are two different ways you can use conditional text:

First, you can use IF and END IF instructions to include or exclude simple optional text. For example, in an employment agreement, you may need to include or exclude a paragraph describing a probationary period for the new employee. If the employee isn't required to complete a probationary period, you wouldn't include information about it.

Second, you can use IF, ELSE IF, ELSE, and END IF instructions to include alternative text. For example, you may have different versions of a paragraph, only one of which the user will include in the assembled document. Using ELSE IF and ELSE, you can create a series of conditions under which the user determines which text HotDocs will include.

Repeat Variables to Create Lists

Sometimes there are variables in a template that you need to repeat so users can enter more than one answer. For example, you may need to list the client's children. Because you don't know how many children a client may have, you can repeat the *Child Name* variable. This allows the user to enter as many children as necessary. You accomplish this by using a REPEAT instruction. You can repeat a single variable, or you can repeat entire sections of text.

Often, you must repeat information within a word processor table. For instructions on how to repeat a single cell or an entire row, see [Use a Word Processor Table to Display a List](#).

Group Variables in Dialogs

As you know, variables in the template represent the questions users must answer during the interview. You can organize these variables into logical groupings, called dialogs.

Typically, when you create a dialog, you group similar questions together. For example, if the template asks for the name and address of a client, you could group all of these variables together in a single dialog named *Client Information*. Information about the spouse could be asked in a separate dialog, as could information about the case.

If HotDocs should ask questions only under certain conditions, you can use dialog scripting to include or exclude those questions. You can also select several different options that control the way the questions appear in the dialog. For example, you can choose to place all of the questions above the answer fields, or you can choose to place each question to the left of its answer field.

Test Assemble the Template

Test assembling a template is an imperative task in the template development process. Testing allows you to see the full interview as the user will see it. It provides an opportunity for you to correct mistakes, as well as fine-tune the interview process by improving questions and adding other information to make the process easier for the user.

It's important that as you are testing, you enter many different combinations of answers. This exercises the scripting in your template and helps you ensure that no matter what answers users enter, HotDocs will assemble the document correctly.

As you test assemble a template, you should check for the following things:

- HotDocs isn't reporting any errors or warnings that you need to fix.
- The interview outline looks right and operates properly.
- Dialogs look right and operate properly.
- HotDocs has assembled the document correctly with no unanswered questions and has correctly formatted the answers.

If you find problems as you are testing, you can leave the test assembly window open and make changes to the underlying components. You can then update the test assembly window with your changes.

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Organize the Final Template Library

Once all of your templates are automated, you can organize them within the library. How you organize the library depends on the template set. (See [Introduction: Use HotDocs Libraries.](#))

One way you can organize the library is to create folders for storing the templates. Frequently, you can group similar templates in these folders. For example, wills can be organized in one group or a series of subgroups, depending on the number and types of wills you have automated. (See [Organize the Contents of a Library.](#))

If you have a large set of templates, it may make more sense to create individual libraries for the template types. Real estate templates can be stored in one library, while family law templates could be saved in a different library.

Because the items in the library work like shortcuts to the actual files, you must be cautious when working with the actual files. Moving an actual file without updating the reference in the library will make the file inaccessible from the library. If you need to move the files in the library, use either the **Move** command or the **Copy** command (both commands found in the **Template** menu). If you need to update references, choose **Properties** or **Multiple** (**Edit** menu). (See [Move Items to New Locations on Disk](#), [Change the Properties of a Single Library Item](#), and [Change the Properties for Multiple Items in a Library.](#))

When you created the templates, you may have added template titles and descriptions for each template you added to the library. If you did not, this is a good time to do this. Template titles and descriptions are an easy way to help the user identify the template. You do this by editing the template properties. (See [Change the Properties of a Single Library Item.](#))

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Distribute the Templates

The final task in the template development process is to distribute your template sets so they can be used for assembly. Before doing this, you must first identify who will use your templates.

If you've automated your templates for your own practice, there may not be a distribution plan—you can assemble documents from the same templates you are editing. Or, if you'd like to separate template development from document assembly, you can create a new library and copy your completed templates to a different folder. As you make corrections to the templates, you can update those files saved in the assembly-only location.

If you plan to share your templates with others in the firm, you should place copies of the files on a network location for your co-workers. You should restrict access to the templates as much as possible to keep users from inadvertently changing the files. Some ways you can do this include:

- Making the network folder where the templates are saved read-only. (You should also make the template files themselves read-only.)
- Placing a copy of the files on a network and then having users import the library to their local drives for assembly-only. (See [Copy Templates to New Locations](#) and [Import One Library Into Another](#).)
- Publishing the template set as a HotDocs auto-install file, which users can then install on their computers. (See [Publish Templates as Auto-Install Files \(HDI\)](#).)

If you plan to share your templates with those outside the firm, you should publish the templates and distribute them using the Internet or even a CD.

If you plan to sell your automated templates and distribute copies of HotDocs Player with the templates, you must acquire a publishing license from HotDocs Corporation, which allows you to redistribute HotDocs Player to your customers. (HotDocs Player is a free, assembly-only version of HotDocs.) (See [Publish and Register Templates for Use With HotDocs Player](#).)

Another option is to publish your templates using HotDocs' publishing feature. Publishing options are only available to HotDocs Developer users, however. For information on upgrading your license, please contact your sales representative.

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Conclusion

Conclusion

As with any major project, the more planning you do up front, the better your results will be. While this document covers the basics, it's expected that you will also discover tips and tricks that will help you improve the template automation process.

For helpful lists of Variable Properties and Template Instructions see the appendices to this section:

- [Appendix 1: Variable Properties](#)
- [Appendix 2: Template Instructions](#)

Appendix 1: Variable Properties

Following is a list of the different variable types, followed by the properties you can assign to each variable type:

Text Variables	
Patterns	HotDocs allows you to assign a pattern to a text variable. The two most common patterns are telephone number patterns and Social Security number patterns. These patterns format users' answers correctly both in the interview and in the assembled document.
Answer field height	Each variable in a template is asked in an answer-gathering dialog during the interview. You can control how tall (up to 12 lines) the answer field is in the dialog.
Maximum	The maximum number of characters allowed in a text answer is 15,000. If an answer requires a specific number less than this, you can specify it.
Number Variables	
Maximum and minimum values	You can specify limits for how large or small a number can be. For example, if new employees are allowed between 10 and 15 paid vacation days, you can specify these limits so that users don't inadvertently specify more vacation days than they are allowed.
Decimal places	You can indicate the number of decimal places (up to 7) that should be allowed in a number.
Currency symbol	You can designate whether a currency symbol should be used for a monetary amount. Predefined options include \$, £, DM, and €, but you can enter your own. (Patterns have a 3-character limit).
Multiple Choice Variables	
Multiple Choice options, prompts, and merge text	<p>Multiple Choice variables allow users to choose an answer from a list of predefined options. If the options you specify aren't descriptive enough, you can define a prompt for each option. Additionally, you can specify different text for each option that will be merged in the completed document.</p> <p>For example, say you need to merge gender-specific pronouns (like he/she or his/hers) in the document. To do this, you would</p>

Selection options and styles

create a Multiple Choice variable (Gender) with two options—Male and Female—and then specify merge text that will merge the correct pronoun (he or she), based on the user's gender.

You can allow users to select only one option or select multiple options. You can also designate whether the options appear as buttons or as lists.

By default, all new Multiple Choice variables are set to **Select One Only**.

Computation Variables**Scripts**

Computation variables tell HotDocs to perform a particular task during assembly, such as insert one template into another or perform some action based on an answer the user provides. Similarly, they are used to calculate monetary amounts or other figures, or find the number of years between two given dates, and so forth.

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Appendix 2: Template Instructions**HotDocs Instruction****What It Does****IF instruction**

Designates that a variable, word, phrase, or paragraph should only be included in the assembled document when a certain condition is met.

REPEAT instruction

Repeats variables and text so that users can enter more than just one answer.

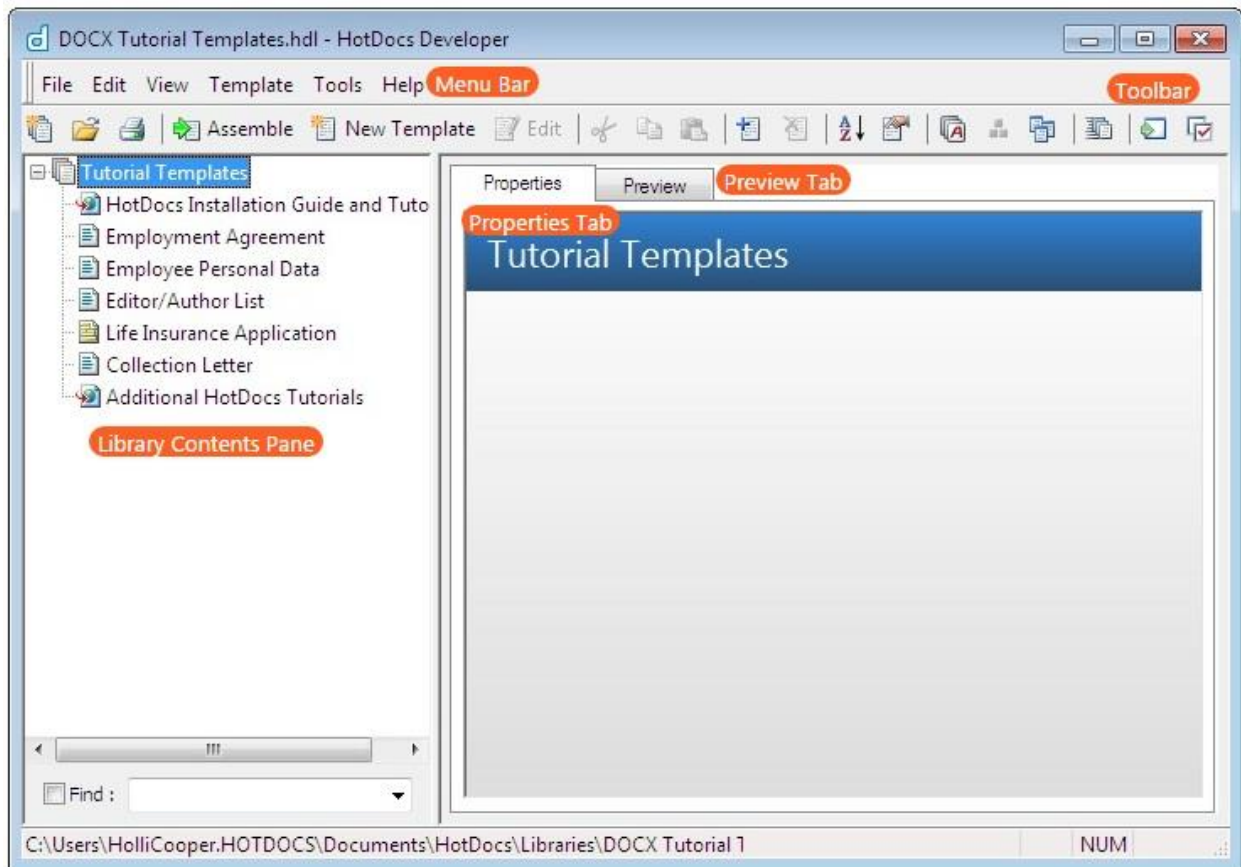
INSERT instruction

Inserts another template into the current template. (For example, perhaps you have a separate file that includes boilerplate language. You can use a separate document for this language and then just insert it wherever you need it.) In most cases, inserted templates appear "inline" with the template into which they are inserted.

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Using Libraries

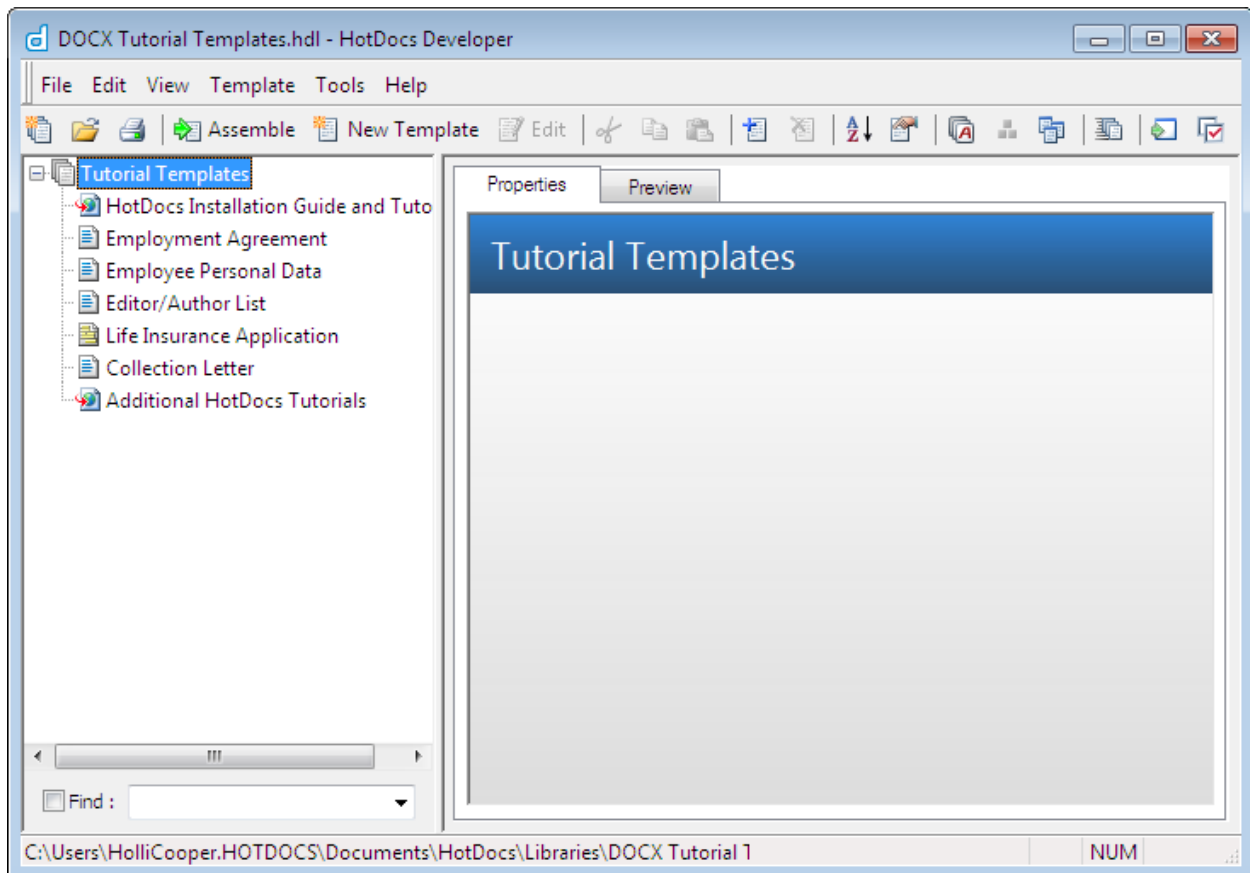
At a Glance: The HotDocs Library Window



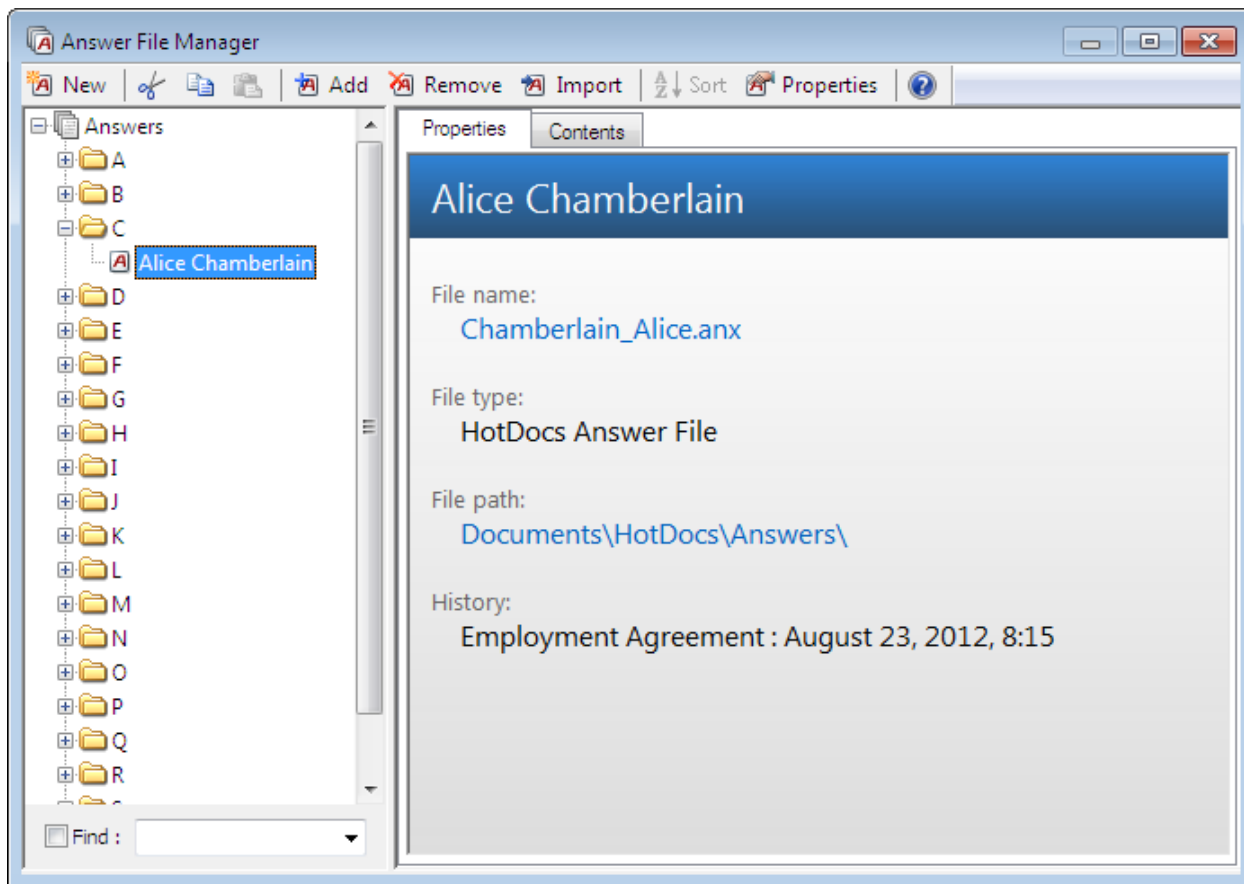
Introduction: Use HotDocs Libraries

HotDocs files—such as templates, clause libraries, and answer files—reside in folders on your local disk or on a network. To make it easier to organize templates and clause libraries, you can use a HotDocs template library or, for answer files, the Answer File Manager. Using a library lets you assign titles and descriptions to files, and, in the case of answer files, track the history of when a file is used.

Template libraries help you organize template files and provide quick access to many HotDocs tools, such as the Assembly Queue and HotDocs Options:



The Answer File Manager is a library of answer files. You can group answer files as well as sort them. You can also view a history of when a specific answer file was used:



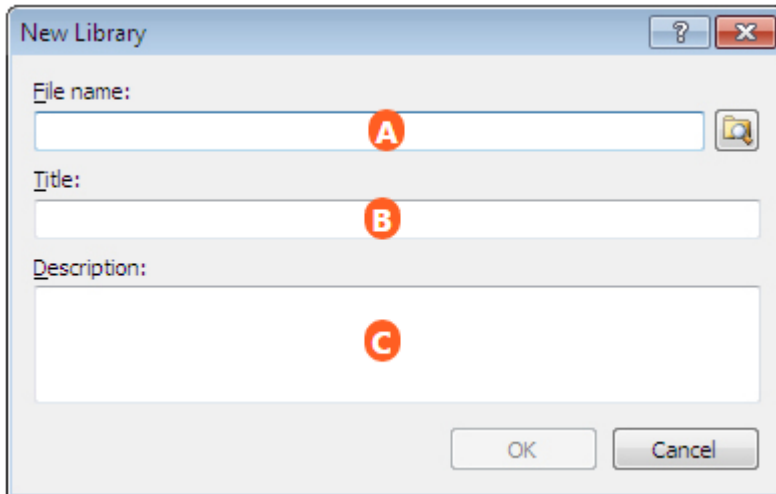
Both the template library and Answer File Manager are divided into two panes. The left pane shows a list of the items referenced in the library. Depending on what kind of library it is, these items can include folders, templates, clause libraries, or answer files. The right pane displays information about the selected item. A different view shows the contents of the file.

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 and locates the actual template or answer file.


Additionally, folders in a library help you organize the list of files in the library—not the actual folders on the local disk or network.


Because the items in the library work like shortcuts to the actual files, you must be cautious when working with the actual files. Moving an actual file without updating the reference in the library will make the file inaccessible from the library. If you need to move the files in the library, use either the **Move** command or the **Copy** command (see [Move Items Within a Library](#) and [Copy Templates to New Locations](#)). If you need to update references, choose **Properties** or **Multiple** from the **Edit** menu. (See [Change the Properties of a Single Library Item](#) or [Change the Properties for Multiple Items in a Library](#).)

At a Glance: The New Library dialog box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening the HotDocs Library, you can open the **New Library** dialog box by clicking on the  **New Library** button on the toolbar.

In the first text field **A** you can enter a file name for the new template and you can use the  **Browse** button to the right specify a location for the new library file in your file system.

HotDocs will automatically copy the file name into the second text field **B** as the template title, but you can edit this if you would like to use a different title for the template. This title will appear in the title bar of the library window.

In the third text field **C** you can enter an optional description of the library. Here you can specify information about the library, such as what kinds of templates are included, or when the library should be used. If specified, it appears when the user views the properties of the top folder in the library.

To learn more about creating a new library follow the link below:



- [Create a Library](#)

Creating a Library

You may want to use separate libraries for templates that deal with different matters. For example, you may want to create one library for divorce templates and another library for estate planning templates. When you create a library, you create an .HDL file on the disk. Once it's created, you can add references to templates to it as well as organize it in whatever way you need.

By default, all new libraries you create will be saved in XML format. If you need to use the library with versions of HotDocs prior to HotDocs 2009, you must specify this format by choosing **Save Library As** from the **File** menu and then choosing **HotDocs 2005-2008 Library** from the **Save as type** drop-down list. (See HotDocs and XML File Formats for details.)

To create a library

1. At the HotDocs library window, click the  **New Library** button. The **New Library** dialog box appears.
2. Click the  **Browse** button next to the **File Name** field. The **New Library File Name** dialog box appears.
3. Browse to the location where you want to save the file and enter a name in the **File Name** field. (Click **OK** once you have specified the file location.)
4. At the **New Library** dialog box, enter a name for the library in the **Title** field. This title appears as the top folder in the library window. (Library titles can be up to 100 characters long.)
5. Optionally, type a description of the library in the **Description** field. The description appears in the **Properties** tab when the user views the main folder in the library.


Once you create a new library, you can add templates and other files to it. See [Add Templates and Other Files to a Library](#).

See [Change HotDocs Program File Locations](#) for information on the default location HotDocs looks for and saves library files.

Open a Library

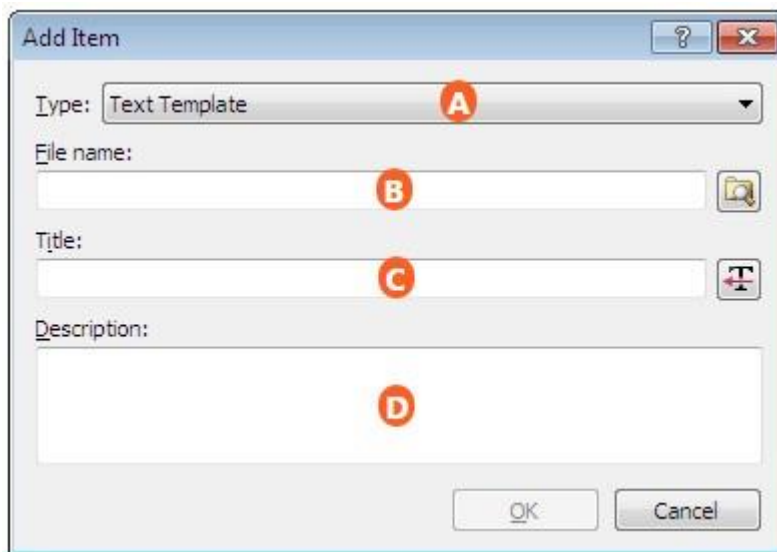
Often you have templates that are located in different libraries. You can access any library by using the **Open** command at the library you are currently viewing.

To open a different HotDocs library


1. Start HotDocs. (See Start HotDocs.)
2. At the library window, click the  **Open Library** button. The **Open Library** dialog box appears.
3. Locate and select the library (.HDL) file with which you want to work, then click **Open**. The folders, templates, and clause libraries in the new library appear in the template list.

See [Change HotDocs Program File Locations](#) for information on the default location HotDocs looks for and saves library files.

At a Glance: The Add Item dialog box






Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.


After opening the HotDocs Library, you can open the **Add Item** dialog box by clicking on the  **Add Item** button on the toolbar.

At the top of the dialog box is a drop-down list **A** where you can choose the type of item you wish to add to the library. You can choose from:

- Text Template
- Form Template
- Interview Template
- Clause Library
- HotDocs Model
- Auto-Assemble File
- Web Address
- Folder

In the first text field **B** you can enter a file name for the new template or you can use the  **Browse** button to the right to locate a file in your file system.

In the second text field  you can specify the title of the item, which appears when you select the item and view its properties. HotDocs suggests a title based on the file name. If the template provider has specified a default title, you can click the  **Get Title** button and that title will be used instead.

In the third field  you can enter an optional description of the library item, such as how the item should be used, or when it was created. This information appears when you select the item and view its properties.

To learn more about adding an item to a library follow the link below:

- [Add Templates and Other Files to a Library](#)

Adding Templates and Other Files to a Library



After you create a library, you can add folders, template files, Web addresses, and miscellaneous files to the folder. In order to [upload a template](#) (or any other file) to a **host application**, you must first add it to a library.

When you create new templates, they are automatically added to the library. Clause libraries created at the template library are likewise added to the library automatically. Adding an item to a library does not affect the files on your local disk or network. For example, you could select a form template from a library on your network and add it to a library on your local disk. However, the actual file would remain on the network.

Adding a Single Item to a Library

The items you add using this method are those available in the Type drop-down list.

To add a single item to the library


1. At the HotDocs library window, select a folder.
2. Click the  **Add** button. The **Add Item** dialog box appears.
3. From the **Type** drop-down list, select the appropriate kind of library item. (Your options include **Text Template**, **Form Template**, **Interview Template**, **Clause Library**, **Auto-Assemble File**, **Web Address**, and **Folder**.)
4. Click the  **Browse** button next to the **File name** field and locate the library item.
5. Select the item you want to add and click **OK**. The **Add Item** dialog box appears again.
6. In the **Title** field, enter a title for the library item (100 characters or less). The title will identify the item in the library.

7. Optionally, enter a description in the **Description** field. The description appears in the **Properties** tab when the library item is selected.

Adding Multiple Items at Once

You can add multiple files to a library simultaneously. Doing this however, means you must wait to [assign properties](#) (such as titles and descriptions) to each individual file until after you add the files to the library.

To add multiple items at once

1. Follow the steps in the procedure above until you choose the item type.
2. Click the  **Browse** button next to the **File name** field and locate the library item.
3. Select all the items you want to add and click **OK**. Once they are added, you can modify the properties.

Adding Miscellaneous Files

You can also add miscellaneous files such as word processor documents, PDF files, and so forth to the library. Once you add the file, you can [assign properties](#) (such as titles and descriptions) to each individual file.

To add miscellaneous files





- In Windows Explorer, browse to the file or files you want to add to your library, drag and drop the files onto the library at the location where you want them. Once they are added, you can modify the properties.

Work with Templates and Other Files in a Library

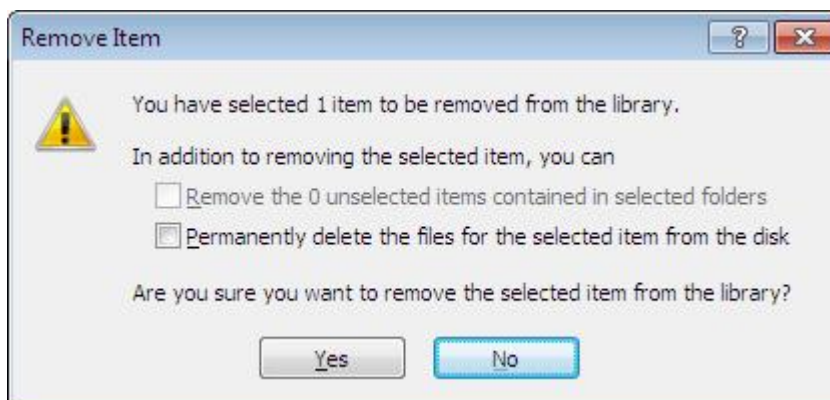
You use a HotDocs library to organize and maintain your template set, including adding and removing templates from the library and changing the properties of templates in the library. (See [Organize the Contents of a Library](#).) You can also use commands in the library to work directly with the templates. For example, you can select a template and assemble it.

To use the library to access the templates and clause libraries


1. At the HotDocs library window, open the desired HotDocs library. (See [Open a Library](#).)
2. Perform tasks as explained in the following table:

To	Do This
Assemble the selected document	Select the template and click the  Assemble button.
Create a new folder in the library	Choose Add Folder (Edit menu).
Add an existing item to the library	Click the  Add Item button. (See Add Templates and Other Files to a Library .)
Remove the selected item from a library	Click the  Remove Item button. (See Remove Items from a Library .)
Move items up or down in the library list	Click on the item and drag it up or down in the list. HotDocs displays a horizontal bar indicating where the item will be placed when you release the mouse.
Modify the selected item's file name, title, or description	Click the  Properties button. (See Change the Properties of a Single Library Item .)
View or hide all of the items within a folder in the library list	Choose Expand All (View menu). (To hide the list again, choose Collapse All .)

At a Glance: The Remove Item Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening the HotDocs Library, you can open the **Remove Item** dialog box by clicking on the  **Remove Item** button on the toolbar.

You can use the two check boxes to specify any options for the removal. Check the top box to approve the removal of items stored within the folder you have selected and check the bottom box to delete the selected files from the disk as well as deleting the references from the library.

To learn more about removing an item to a library follow the link below:

- [Remove Items from a Library](#)


Remove Items from a Library

Libraries do not contain the actual files that HotDocs uses, such as template files, component files, or answer files. Libraries only contain *references* to those files, similar to shortcut icons on a Windows desktop. When you remove an item from a library, you can choose to remove just the reference, or you can choose to delete the actual file from disk.

The available options for removing items in a library depend on the type of item:

- When you remove the reference for a template, you can choose to also delete the associated template file, component file, and clause library file (if any) from disk. If you do this, the files you delete are either sent to the Windows Recycle Bin (if the template is stored on your local disk) or permanently deleted (if it's stored on a network drive). Or, you can delete only the reference, leaving the template, component file, and clause library file in place on the disk—perhaps for use in another library.
- When you remove the reference for a folder, you can choose to delete the items within the folder. If you choose to remove the items in the folder, all of the items in that folder and in all subfolders will be removed. If you choose to leave the files, they will be moved to the next higher folder.

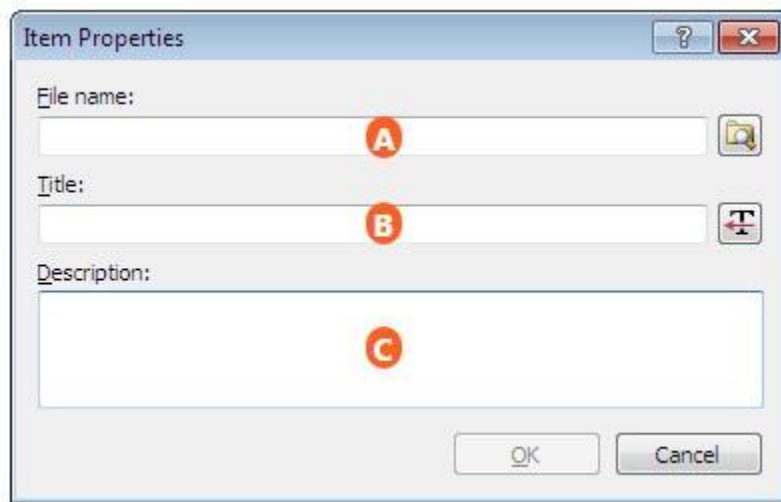
To remove items from a library

1. At the HotDocs library window, select the item (or items).
2. Click the  **Remove Item** button. The **Remove Item** dialog box appears, asking if you want to remove the reference to the file from the library.
3. Optionally, if you have selected a folder and you want to remove items within the folder, select **Remove the unselected items contained in selected folders**.
4. Optionally, if you want to delete the actual files from disk, select **Permanently delete the files for selected items from the disk**.
5. Click **Yes**.


If the template you are deleting is in the same folder as another template with the same file name but a different file name extension (for example, you are deleting *Invoice.rtf* and the same folder


also contains *Invoice.wpt*), HotDocs doesn't delete the associated files, like the component file. You need these files for the other template.

At a Glance: The Item Properties dialog box




Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening the HotDocs Library, you can open the **Item Properties** dialog box by clicking on the  **Properties** button on the toolbar.

In the **File name** field **A** you can enter a file name for the new template. You can use the  **Browse** button to view or change the location on the disk where your template is saved. This field can also be used to enter command-line options for the template. For example, by adding different [command-line options](#) to the end of the file name, you can have HotDocs automatically save answer files, send the finished document directly to the word processor and many [more](#).

HotDocs will automatically copy the file name into the **Title** field **B** when you click into it, but you can edit this if you would like to use a different title for the template.

In the **Description** field **C** you can enter an optional description of the library item, such as when it was created, or how it should be used. This description will appear when the user views the item properties tab in the library.

Clicking on the  **Get title** button pulls the title and description information from the Component File Properties and will overwrite anything currently in both fields.

To learn more about item properties follow the link below:


- [Change the Properties of a Single Library Item](#)
- [Change the Properties for Multiple Items in a Library](#)
- [Introduction: Command-Line Options](#)



Change the Properties of a Single Library Item

You can change the title and description of a library item. If the item is a template or clause library, you can also change the file name and add command-line options.

Changes made at the **Item Properties** dialog box affect only the reference to the item—not the template or clause library files themselves. For example, if you change a template's file name at the **Item Properties** dialog box, it does not change the template's name on your local disk or network. Unless you also update the underlying file, the template may no longer work because the reference is incorrect.

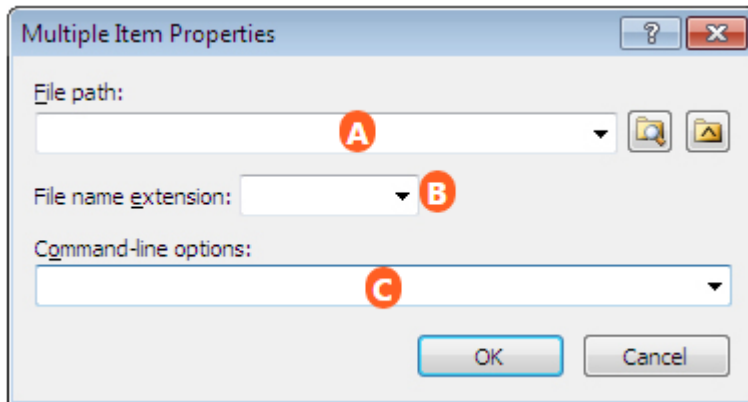
To modify a library item

1. At the HotDocs library window, select the item you want to modify.
2. Click the  **Properties** button. The **Item Properties** dialog box appears.
3. Make changes based on the following options:


To	Do This
Change the file path	In the File Name field, type the new file path, or click the  Browse button and specify a new path.
Change the item title	In the Title field, either type a new title in the field, or click the  Get Title button to use the default title. (Titles can be 100 characters long.)
Change the command-line options	In the File Name field, type the new options. (For example, <i>Refund.wpt /af=bwhittington.anx</i>). See Introduction: Command-Line Options .
Change the item description	In the Description field, enter a new description. (The description appears in the Properties tab when the library item is selected.)



You can change the properties of several other library items at once. See [Change the Properties for Multiple Items in a Library](#).

At a Glance: The Multiple Item Properties dialog box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening the HotDocs Library, you can open the **Item Properties** dialog box by clicking on the  **Multiple** button in the **Edit** Menu with the items selected.

In the first text field **A** you can choose to leave the <default> file path, enter a new file path for the selected items, choose from recently used paths in the drop-down list, click the  **Browse** button to navigate to and select a new folder, or click the  **Reference Path** button to select the path you pre-defined in HotDocs Options (See [Change HotDocs Program File Locations](#)).

Using the second text field **B**, you can keep the <various> file names, or choose to give all the selected items the same file name extension (by typing it into the field or alternatively, by selecting one of the items existing extensions using the drop-down list). Note, however, that changing the file name extension here does not change the extension for the actual file.

In the third text field **C** you can type in any command-line options you would like to add to the items or choose from a list of currently used options in the drop-down list. Any options you specify here will be applied to all the items you have selected. (To learn more about command-line options see [Introduction: Command-Line Options](#) and to view a list of command-line options see [Full List of Command-Line Options](#))

To learn more about item properties follow the link below:

- [Change the Properties of a Single Library Item](#)
- [Change the Properties for Multiple Items in a Library](#)


Change the Properties for Multiple Items in a Library




You can change the folder paths, file name extensions, and command-line options for two or more library items in a folder. For example, if you have used Windows Explorer to move templates from one folder to another, you can update all the file paths in the library at once. (Remember, moving the files on disk does not automatically update the references to those files in the library.)

If you select a folder, the changes affect all items in the folder and in any subfolders. For example, if you select the top folder of a library, you will change the properties for every item in the library.

Changing properties of library items does not affect the files on your local disk or network. For example, changing the file path in the **Multiple Item Properties** dialog box does not actually move the file to a different folder—you must manually move the files. (See [Move Items to New Locations on Disk](#).)

To change the properties of two or more items in a library folder

1. Select the items (or the folder that contains the items) and select  **Multiple** (**Edit** menu). The **Multiple Item Properties** dialog box appears.
2. Make changes as specified in the following table:

To	Do This
Change the file path for the selected items	<p>Click the File path  Browse button and browse to the new folder. Then click OK. The new folder path is inserted. (Click the File path drop-down button to view a list of all the various file paths used for the templates in your list.)</p> <p>To specify the default folder the different files, choose <default> from the File path drop-down list and click OK. (The default folder is the location HotDocs looks for the file when no file path is given. You can specify what this default location is at HotDocs Options. See Change HotDocs Program File Locations.)</p>
Change the reference path for the selected items	<p>Click the  Reference path button and choose a path from the Select Reference Path dialog box. When you click OK, HotDocs inserts the reference path keyword in the File path field.</p> <p>To remove all reference paths and specify the default folder for the different files, choose <default> from the File path drop-down list and click OK. (The default folder is the location HotDocs looks for the file when no file path is given. You can specify what this default location is at HotDocs Options. See Change HotDocs Program File Locations.)</p> <p>The  Reference path button isn't available unless you have at least one reference path defined in the File Locations folder of HotDocs Options. (See Change HotDocs Program File Locations.)</p>

Change the file name extension for the selected items

[Assign Reference Paths to HotDocs Files.](#))

Click the **File name extension** drop-down button and make a selection. If the desired extension is not listed, type it.

HotDocs displays a list of the file name extensions for all the items you have selected in the **File path** drop-down list. If you have multiple file types selected, **<various>** appears in the **File name extension** field.

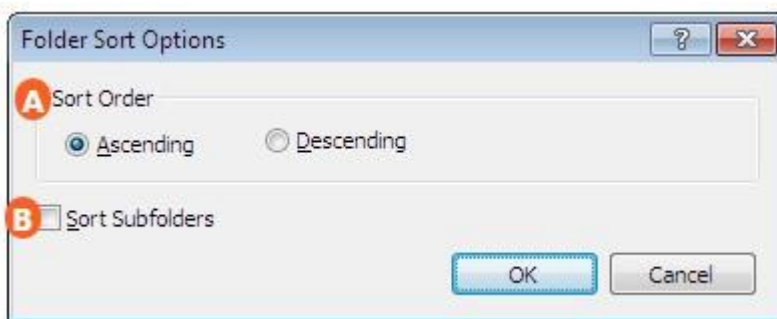
Change the command-line option or options for the selected items

Type the command-line option (for example, */af=path and file name*) in the **Command-line options** field and click **OK**. If assigning multiple options, include spaces between each option. (See [Introduction: Command-Line Options.](#))


To remove existing command-line options, select **<none>** from the **Command-line options** drop-down list and click **OK**.

3. Click **OK** at the **Multiple Item Properties** dialog box.
4. When HotDocs confirms the change, click **Yes**.

At a Glance: The Folder Sort Options Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening the HotDocs Library and clicking on your chosen folder (or the entire library), you can open the **Folder Sort Options** dialog box by clicking on the  **Sort** button on the toolbar.

Using the multiple choice menu **A** you can choose between **Ascending** or **Descending**. **Ascending** sorts the contents of a folder from 1 to 9, and from A to Z and **Descending** sorts the contents of a folder from 9 to 1, and from Z to A.

Clicking on the check box **B** below will sort items in any subfolders based on the Sort Order option you selected.

To learn more about sorting library folders follow the link below:

- [Sort Items in a Library](#)

Sort Items in a Library

To help you locate or organize files in the library, you can sort the items in a folder in alphanumeric order.

To sort library items

1. At the HotDocs library window, select the folder whose items you want to sort.
2. Click the **Sort** button. The **Folder Sort Options** dialog box appears.
3. Select the order for sorting the library items:
 - To organize them *A to Z* and *1 to 9*, select **Ascending**, then click **OK**.
 - To organize them *Z to A* and *9 to 1*, select **Descending**, then click **OK**.
4. Optionally, select **Sort Subfolders** to sort the folders inside the selected folder.

The template list changes to show the rearranged library items.

You can save templates you frequently use to a *Favorites* folder in the library for quicker access, select the template and click **Add to Favorites** (**View** menu). See [Create a Favorites Folder in the Template Library](#).








Organize the Contents of a Library

Once you create a library and add templates to it, you often want to organize the contents of the library into logical groups. This may include grouping items by subject matter in folders, or grouping items

alphabetically. Additionally, you may need to print a list of templates in the library or remove templates you no longer need.

To organize the contents of a HotDocs library

1. At the HotDocs library window, open the desired HotDocs library. (See [Open a Library](#).)
2. Use any of the following commands to work with files in the library:

To	Do This
Add a folder to the library so you can group library items	Choose Add Folder (Edit menu). The Add Item dialog box appears where you can specify the folder name and a description. (Once you create a folder, you can move items to it.)
Print a list of the titles, file names, and descriptions of templates and folders in a library	Click the  Print Library button. (See Print a List of Items in a Library .)
Remove an item from the library	Select the item and click  Remove Item button. (See Remove Items from a Library .)
Remove an item from the library and places a copy of it on the Clipboard so you can paste it elsewhere in the library	Select the item and click the  Cut button.
Copy an item in the library to the Clipboard so you can paste it elsewhere in the library	Select the item and click the  Copy button.
Paste an item to a new location in the library	Select the folder in the library where you want the item pasted and click the  Paste button.
Sort items in a library in ascending or descending order based on their titles	Select the folder on which you want to sort, and click the  Sort button. (See Sort Items in a Library .)
Change an item's file name, title, or description	Select the item and click the  Properties button.
Search for a specific template in the library list	Type the text for which you are searching in the Find field. HotDocs will show only those files that contain the search text in the template title, file name, or description. (See Search for a Specific Template in a Library .)
Group templates you use most frequently in a Favorites folder	Select the template and choose Add to Favorites (Edit menu). (See Create a Favorites Folder in the Template Library .)

Create a Favorites folder in the Template Library

You can create a *Favorites* folder in your template library and add templates to it. This may be useful if you find you assemble some documents more than others and you want to access them quickly each time you view the library.

To add templates to a Favorites folder in the library

1. At the template library, select the template you want to add to the *Favorites* folder.
2. Click **Add to Favorites** (**Edit** menu).

If no *Favorites* folder exists, HotDocs creates the folder and adds the template to it.


Create a New Library by Exporting Part of an Existing Library

You can create smaller libraries by exporting some of the folders and files of a larger, existing library. Creating a library this way eliminates the need to manually create a new library and then add each folder, template, or clause library to it.


When you export part of a library, HotDocs asks you for the file name and title of the new library. Then it creates the library, and finally creates the library references in it. During the process, you can choose to have HotDocs copy the files in the library you are exporting to the new location, or you can choose to have the library reference the original files.


Exporting will only export the files you select at the library. This means that if a template you are exporting contains references to other templates or files not listed in the library, those items will not be exported and you may receive errors when you attempt to use the template for assembly.

To export part of an existing library

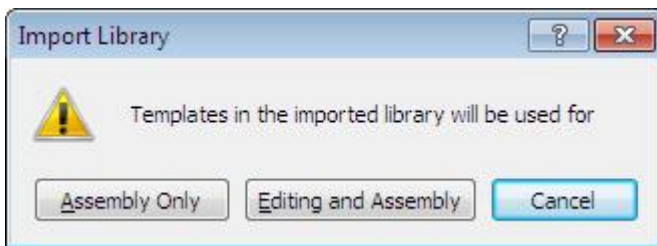
1. At the HotDocs library window, select the library items you want to export. (If you select a folder, all the items in the folder will be exported.)
2. Choose **File > Export Library To > HotDocs Library File**. The **Export HotDocs Library File** dialog box appears.
3. At the **File name** field, click  **Browse**, select a location for the new library, and enter a library name in the **File name** field. (Click **OK** when you are finished.)

4. At the **Export HotDocs Library File** dialog box, enter a name for the new library in the **Title** field, or accept the suggestion HotDocs makes. This title will appear in the **Properties** tab of the HotDocs library window.
5. Optionally, in the **Description** field, type a description of the library. (The description appears in the **Properties** tab when a library (or folder) is selected.)
6. Click **OK**. HotDocs asks if you want to export the selected files:
 - Click **Yes** to copy the selected files to the same folder as the new library.
 - Click **No** to have the new library refer to the files in their current location.

After exporting the items, the original library items are still available. (HotDocs does not delete the references from the original library—templates can be referenced in multiple libraries.) If you want the old references deleted, select the library items and click  **Remove Item**.

HotDocs does not automatically display the new library. To open it, click  **Open** and select the file name for the new library. (See [Open a Library](#).)

At a Glance: The Import Library Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening the HotDocs Library, you can open the **Import Library** dialog box by choosing **Import Library** from the **File** menu and selecting a HotDocs library at the browse window.

You have three options at the **Import Library** dialog box:

- **Assembly Only:** Imports the library in such a way that you will be able to assemble documents, but not modify the library structure or edit items in the library.
- **Editing and Assembly:** Imports the library in such a way that you will be able to edit the items in the library, assemble them, and modify the structure of the library.
- **Cancel:** Cancels the import process without making any changes to the library.

To learn more about importing a library follow the link below:

- [Import One Library Into Another](#)

Import One Library Into Another

You can import a copy of another library into the current library. The imported library will become a folder in the current library.


To import one library into another

1. At the HotDocs library window, select the folder where you want the imported library to be located.
2. Click **Import Library** (**File** menu). The **Import Library** dialog box appears.
3. Select the library you want to import and click **Import**. The **Import Library** dialog box appears.
4. Choose how you want to import the templates:
 - Click **Assembly Only** to assemble documents from the templates—and nothing else.
5. If you select **Editing and Assembly**, HotDocs displays another dialog box, prompting you to choose whether to copy the associated files or use the originals:

Print a List of Items in a Library

You can print a list of the files and folders in the library currently displayed in the HotDocs library window, allowing you to see the library structure, as well as the file path and the description of each item.

To print a HotDocs library

1. At the HotDocs library window, open the library whose contents you want to print. (See [Open a Library](#).)
2. Click the  **Print Library** button. The **Print** dialog box appears.
3. Click **OK**. The list of titles, file names, and descriptions are printed at the selected printer.

To preview what the printout will look like before you print it, select  **Print Preview** (**File** menu). To return to the library window, click **Close**.

Save a Library

HotDocs saves all changes you make to a library immediately after you make the change. Clicking **Save** (**File** menu) simply displays a message confirming this

Save the Contents of a Library as a Text File

You can save the contents of a HotDocs library—including folder names, template file names, titles, and descriptions—as a text file. The hierarchy of the library is preserved within the text file. This is useful if you want to spell check the text used in your library. (To do this, you must open the text file in a word processor with spell-checking capabilities).

To save the library as a text file

1. At the HotDocs library, select **Export Library To > Plain Text File** (**File** menu). The **Save As** dialog box appears.
 2. Select a location to save the text file to, enter a name for the file, then click **Save**. A .TXT file containing a tabbed list of the folder names and template titles is saved to the location you choose.
-

Move Items Within a Library



To organize your library, you can move an item to a different location in the same library by dragging, by cutting and pasting, or by copying and pasting.

These methods do not move the actual file to a different location on your local disk or network. See [Move Items to New Locations on Disk](#) for information on doing this.



To drag library items to a new location

- At the HotDocs library window, select the library item and drag it to the new location using the mouse. (As you drag, HotDocs uses a horizontal bar to indicate where the item will be placed when you release the mouse button.)

To cut and paste several library items

1. At the HotDocs library window, select the items you want to move.
2. Click the  **Cut** button (or press **Ctrl+X**.)
3. Select the new location and click the  **Paste** button (or press **Ctrl+V**).


To copy and paste several library items within the library

1. At the HotDocs library window, select the items you want to copy.
2. Click the  **Copy** button (or press **Ctrl+C**).
3. Select the new location and click the  **Paste** button (or press **Ctrl+V**).

Move Items to New Locations on Disk

Using the **Move** command (**Template** menu) at the HotDocs library window, you can move template and clause library files to new locations on your local disk or network. Using this command also updates the library reference to the file. (Moving files in other ways, for example, by using Windows Explorer, requires that you [manually update the library reference](#).)

To move template and clause library files

1. At the HotDocs library window, select the templates and clause libraries you want to move.
2. Click **Template** menu > **Move** .
3. Browse to the folder where you want to copy the template or templates.
4. Click **OK**. HotDocs removes all associated files except for inserted templates (component files, default answer files, and so forth) from the old location, pastes them at the new location, and then updates the references to the files in the HotDocs library.

HotDocs handles the **Move** command a little differently if you are moving the template from a folder that contains another template with the same file name but different file name extension (for example, if you are moving *Invoice.docx* from a folder that also has *Invoice.wpt*). In such a case, HotDocs copies the associated component file to the new folder, but does not delete it from the original folder because it is still needed by the other template.

You can also copy templates to new locations on disk and have the library reference updated. See [Copy Templates to New Locations](#) for details.

When a template has insert fields, HotDocs does not move those inserted templates along with the parent template. If you want to move a template that has insert fields you can use the Publishing Wizard to publish the initial template to the new location as a standard template file and HotDocs includes a copy of all the files necessary for assembly.

Copy Templates to New Locations

Often you need to make a copy of a template and save it to a new location on disk. You can use the **Copy** command at the template library to do this. As you are copying, you can choose to make the template and component file read-only. You can also choose to update the reference to the file in the library so the library refers to the copied template rather than the original.

Be aware that copying a template creates two templates with identical template IDs. This can lead to [template ID conflicts](#) should you upload both the original and copied templates to a web server.

To copy the template to a different location

1. At the HotDocs library window, select the templates and clause libraries you want to copy. (Press **Ctrl** or **Shift** to select multiple items.)
2. Click **Template** menu > **Copy**.
3. Browse to the folder where you want to copy the template or templates and click **OK**.
4. You can then set some properties for the copied templates:
 - Select **Mark newly created templates as read-only** to keep users from editing the template. (This assigns the read-only property to both the template and the component file.)
 - Select **Update library entries** to refer to the newly created templates to have HotDocs change the file path for the library item so that it uses the file path for the copied template.

When a template has insert fields, HotDocs does not copy those inserted templates along with the parent template. If you want to copy a template that has insert fields you can use the Publishing Wizard to publish the initial template to the new location as a standard template file and HotDocs includes a copy of all the files necessary for assembly.

Assembling Documents

Completing an Interview

Overview: Assemble a Text or Form Document

There are two types of documents you can assemble—text documents and form documents:

- Text documents are documents you view in your word processor. Once the document is assembled, you can edit any of the text.
- Form documents are those in which the underlying text is *static*, meaning it cannot be modified. Only the answers that are merged into the document can be modified. (An IRS form is a good example of a form document.)

The process of assembling both of these types of documents is very similar. However, there are specific things you should know about assembling form documents. Please see [Introduction: Assemble a Form Document](#) for a description of these differences.

When you assemble a document, HotDocs displays the assembly window, which is divided into three panes—the *interview outline*, the *dialog pane*, and the *resource* pane. The interview outline shows a list of dialogs (or groups of questions). You can click on any dialog in the outline and view (and answer) the questions in the dialog pane. Finally, where provided, the resource pane shows information to help you answer questions in the dialog.

As you answer questions, HotDocs merges your answers into the assembled document, which you can view by clicking the **Document** tab at the assembly window. As you are reviewing the assembled document, if you see an answer that needs to be edited or changed, you can make the change right in the **Document Preview** tab. (Some template providers may prohibit you from changing answers at the **Document Preview** tab. If this is the case, the buttons and commands that control this feature will be disabled.) Additionally, if the template provider has allowed it, you can edit the actual text of the document while viewing the **Document Preview** tab. (These features are available to Microsoft Word users only.) You can also use the document navigation bar to move between answers in the document.

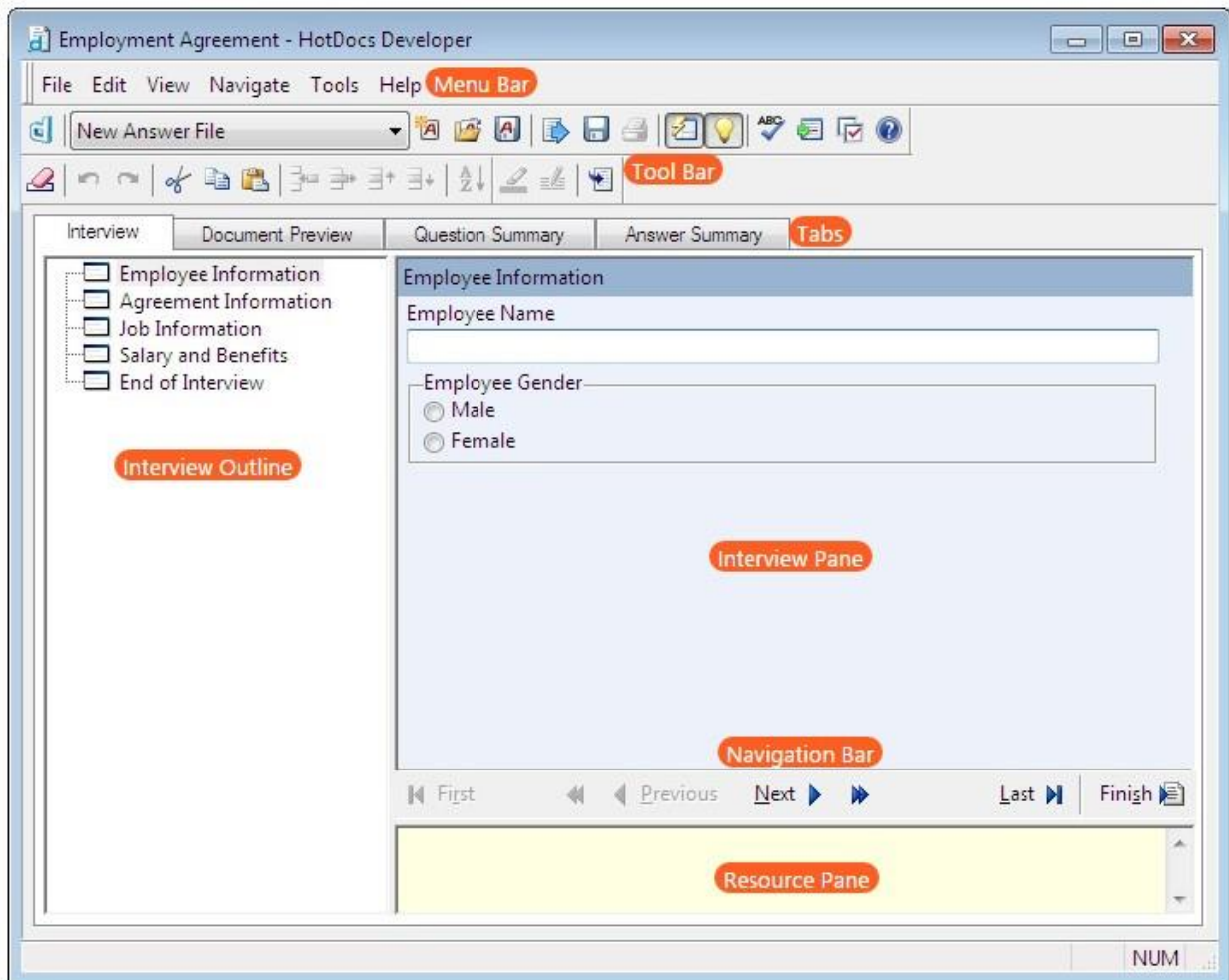
If you need to generate quick views of the document—for example a list of just the questions or a list of questions and answers (without all of the other document text)—you can view the **Question Summary** tab or the **Answer Summary** tab. Both provide you with a short list of information required in the document. You can also view a spreadsheet of the template's variables and any answers that have been given.

Once all of the answers are provided and the document is correct, you can send a copy of the document to a word processor (if you are assembling a text document) or you can view the assembled document at the **Form Document** tab (if you're assembling a form document). If no further editing is needed, you can print the document or save it to disk. You also can save the answers you've provided in an answer file, which can then be used to assemble other documents.

The following diagram shows the assembly process:



At a Glance: The Assembly Window







Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.


When you choose to assemble a template HotDocs will open an **Interview** window. Using this window you can enter answers, view resources, view summaries, and preview the finished document.

The main portion of the **Interview** window is split into 3 panes. The **Interview Outline**, the **Interview Pane**, and the **Resource Pane**.

The **Interview Outline** shows a list of dialogs within the interview. Next to each dialog is an icon indicating the dialogs status and type:

-  None of the questions in the dialog are answered.
-  At least one of the questions in the dialog is answered.
-  All of the questions in the dialog are answered.








 Repeats the dialog, allowing you to enter more than one set of answers.

 Allows you to enter a new set of answers in a list.

In the **Interview Pane** you can see questions on the selected dialog and spaces to type or select your answers. These can be in the form of text or number fields, check boxes, spreadsheets or drop down menus.

Some dialogs or questions will have extra resource information to help the user answer the question (see Add Resource Information to a Variable or Dialog). This information can be displayed in the **Resource Pane**.

Between the Resource Pane and the Interview Pane you can see the Navigation Bar. This contains the following buttons to help you move through the interview:



-  **First Dialog**
-  **Previous Unanswered Dialog**
-  **Previous Dialog**
-  **Next Dialog**
-  **Next Unanswered Dialog**
-  **Last Dialog**
-  **Finish Interview**





















Interview is just one of the five available pages you can look at from this window. You can move to the other pages by clicking on one of the **Tabs** below the **Toolbar**:

- **Document Preview:** A preview of the finished document showing the answers in place.
- **Question Summary:** Displays a list of questions that are asked in the interview with space for answers. This can be printed and used as a paper questionnaire version of the interview.
- **Answer Summary:** Displays a summary of questions in an interview as well as any answers you entered.
- **Variable Sheet:** Displays a spreadsheet of variables, prompts, current answers, and variable types. You can sort the spreadsheet by clicking the spreadsheet column headings.







You can click on the **Interview** tab to return to the interview you are working on.

Above all of the tabs are the Menu bar and Toolbar. From the **Toolbar** you can access the following buttons:














-  **HotDocs Library:** Displays the HotDocs library window.
- **Recent Answer Files Drop-down List:** Displays a list of recently used answer files. Click this button to select a different answer file.
-  **New Answer File:** Replaces the current answer file with a new, empty answer file.

-  **Open Answer File:** Opens the Open Answer File dialog box so you can select another answer file for the interview.
-  **Save Answer File:** Saves changes to the answer file.
-  **Send Document to:** Sends a copy of the assembled document to a word processor or HotDocs Filler, depending on the type of template you are using. Once in the word processor or HotDocs Filler, you can make post-assembly changes to the document. Be aware, however, that any changes you make will only affect that document -- your changes will not be saved in the answer file.
-  **Save Document:** Saves the document to disk. The Save As dialog box will appear, allowing you to specify a name and location for the saved file.
-  **Print Document:** Prints a copy of the current document.
-  **Instant Update:** Determines when HotDocs updates the interview. If the button is pressed down, this happens when you move between answer fields. If it is not pressed down, this happens when you navigate to another dialog. This can help speed up how quickly you are able to move through answer fields in the dialog.
-  **Show Resource Pane:** Shows and hides the resource pane where helpful information about a question or group of questions can be viewed.
-  **Check Spelling:** Checks the spelling of text answers entered during the interview.
-  **Show Assembly Queue:** Displays the assembly queue, which lists all of the templates you have chosen for assembly. The queue gives you greater control over the assembly process when you are assembling multiple documents.
-  **HotDocs Options:** Opens the HotDocs Options dialog box where you can specify several preferences that control how HotDocs works.
-  **Help:** Opens the relevant page of the HotDocs Help File.
-  **Erase Answer:** Clears the answer from the answer field.
-  **Undo:** Undoes the most recent change made to an answer.
-  **Redo:** Restores changes that were made to an answer.
-  **Cut:** Cuts the selected text and saves it to the Windows Clipboard. You can then paste the text into another answer field.
-  **Copy:** Copies the selected text and saves it to the Windows Clipboard. You can then paste it elsewhere.
-  **Paste:** Pastes any text that has been saved to the Windows Clipboard into the current answer field.
-  **Insert Repetition in a Spreadsheet:** Inserts a new, empty repetition above the current repetition.
-  **Delete Repetition in a Spreadsheet:** Deletes the selected repetition from the interview. Any answers you have entered will be lost.
-  **Move Repetition Up in a Spreadsheet:** Moves the selected repetition up in the list of answers. You should be aware, however, that if the template provider has assigned sorting

options to the list, answers in the assembled document will be listed in that order instead of the order you specify here.

-  **Move Repetition Down in a Spreadsheet:** Moves the selected repetition down in the list of answers. You should be aware, however, that if the template provider has assigned sorting options to the list, answers in the assembled document will be listed in that order instead of the order you specify here.
-  **Sort Spreadsheet:** Sorts columns in a spreadsheet in either ascending or descending order. To sort on a second level, include those search options on the second line of the Sort Spreadsheet dialog.
-  **Highlight Fields:** Highlights all answers or unanswered variables at the document preview tab.
-  **Edit Document Text:** Opens the Document Text Editor where you can edit modifiable text within the document.
-  **Go to Answer in Document (at Interview tab):** Positioning your cursor within an answer field and clicking this button will take you to the answer at the Document Preview tab, letting you view the answer in place.
-  **Go to Answer in Interview (at Document Preview tab):** Positioning your cursor at an answer on the Document Preview tab and clicking this button will take you to the corresponding answer field in the Interview tab.

When assembling a form document additional tool bar options become available:

-  **Field Properties:** Changes the properties for the selected field or fields.
-  **Font:** Changes the font for the selected field or fields.
-  **Override Answer:** Allows you to type any answer in the field, even if the field requires a certain type. For example, you can override a number-only field and type a text answer.
-  **Fill Tool:** Allows you to enter information in the field, such as an answer.
-  **Select Tool:** Activates the Select Tool. This button allows you to select an existing field so that you can move it, resize it, or edit its properties (including the variable properties).
-  **Scroll Tool:** Makes the Scroll Tool the current cursor. Use the cursor to grab the current form page and drag it around the window.
-  **Zoom Tool:** Activates the Zoom Tool, allowing you to increase or decrease magnification of the template.
-  **View Page Width:** Displays the entire width of the current form page in the window.
-  **View Full Page:** Shows the whole form document in the window.
-  **Show Fields:** Shows and hides the colored field backgrounds during direct-fill assembly of a form document.
-  **Show Thumbnails:** Shows and hides thumbnail images of each page in the form. You can use these pages to move through the document.
-  **Previous Page:** Moves to the page just before the current page in the form.
-  **Next Page:** Moves to the page just after the current page in the form.

In the **Menu Bar** you can access further options not available on the **Toolbar**.

To learn more about assembling templates follow the links below:

- [Introduction: Assemble a Text or Form Document](#)
- [Adjust HotDocs Windows and Panes](#)
- [Update Your Interview Outline and Document](#)
- [Preview a Template Before Assembling It](#)
- [Assemble a Text or Form Document](#)
- [Assemble an Interview Template](#)
- [Assemble a Document Without Showing an Interview](#)
- [Assemble Multiple Documents](#)
- [Assemble a Clause Library from the Template Library](#)
- [Navigate Through Answer-Gathering Dialogs](#)
- [View Resources During Assembly](#)
- [Use Repeated Dialogs During Assembly](#)
- [Use Inserted Dialogs During Assembly](#)
- [Select Clauses During an Interview](#)
- [Use the End of Interview Dialog](#)
- [Spell Check Answers](#)

Adjust HotDocs Windows and Panes

You can arrange the HotDocs windows and panes to match your work preference.

To work with HotDocs windows


At the HotDocs window, complete any of the following steps:



- To move a window, click on the title bar and drag the window to another location.
- To maximize or minimize the window, click either the **Maximize** or **Minimize** buttons in the window title bar. The **Maximize** button causes the window to fill the entire screen, while **Minimize** closes the window and places it on the Windows taskbar.
- To resize the window to a specific size, move the mouse pointer to a border or corner of the window. When the icon becomes a resize arrow, click and drag the border to the desired position.
- To resize a pane within a window, move the mouse pointer to a border between two panes. The icon becomes a resize arrow. Click and drag the border to the desired proportions.

- To rearrange toolbars, move the mouse pointer to the anchor bar of one of the toolbars. Drag the toolbar to the desired location in the window.


When moving toolbars, you can separate toolbars from the assembly window. To reattach the toolbar, move it to a position over the menu bar. You can also remove toolbars by clearing the toolbar at the **View** menu.

Update Your Interview Outline and Document

Some answers you enter during an interview may cause HotDocs to update the appearance of the interview outline. Additionally, each time you change an answer while viewing the **Document** tab, HotDocs updates the entire document. Depending on the complexity of the interview or the document, this updating may take longer than desired. To minimize the time HotDocs takes to update the interview or document with your changes, you can turn off  **Instant Update** to make HotDocs update only when necessary.

When  **Instant Update** is turned off, information in the interview and document may become outdated. When this happens, the  **Instant Update** button changes appearance. You can click the button and HotDocs updates the interview or document so that all information will be current. HotDocs also updates the document and interview when you move between tabs in the assembly window, as well as when you print, save, or send the assembled document to the word processor.

To control when HotDocs updates the interview outline or document

While viewing either the **Interview** tab or the **Document** tab at the assembly window, click the  **Instant Update** button:

- When the button is selected (or pressed in), HotDocs updates the interview outline as you move between answer fields. If you're viewing the **Document** tab, it updates the entire document.
- When the button is not selected (or not pressed in), HotDocs updates the outline only when you move between dialogs. If you're viewing the **Document** tab, it updates just the answer field you are currently viewing (and any other answer fields that merge the same answer).

Preview a Template Before Assembling It

To help you identify the correct template, you can preview the template before you select it for assembly. The **Preview** tab shows the text of the document, as well as where HotDocs variable fields are merged.

To preview a template

1. At the HotDocs library window, select a template.
2. Click the **Preview** tab. The library window changes to show the template text.

To remove the **Preview** tab from the library window, choose **Preview Tab (View menu)**.

To move the **Properties** and **Preview** tabs to the top of the pane, select **Tabs at Top (View menu)**.

The **Preview** tab shows the information in the template correctly; however, it may not be formatted correctly—particularly when previewing WordPerfect templates. Additionally, previewing form templates will not show you variable fields.

You can preview a simpler version of the template by choosing **Markup View** at the template library window. This changes the preview so it shows simple mark-up fields, rather than complicated automation. (**Markup View** is supported for Word templates only.)

Search for a Specific Template in a Library

Some libraries may contain a long list of templates. Instead of browsing through the template list, you can search for a specific template or clause library based on the template's title, file name, or description.



To search for a template or clause library

1. At the HotDocs library window, select the **Find** check box, located below the template list. The template list changes, showing each template in the library in alphabetical order.
2. In the **Find** field, type the text that is in the title, description, or file name of the desired template. The template list changes to show only the items that contain the text you type. (The **Find** text field is not case-sensitive.)
3. To view the entire library again, clear the **Find** check box.

Assemble a Text or Form Document

You assemble a document by selecting a template and then answering the questions in the interview. Answers to your questions are then merged in the correct places in the document. Once all of the questions are answered, you can view, print, or save the document.

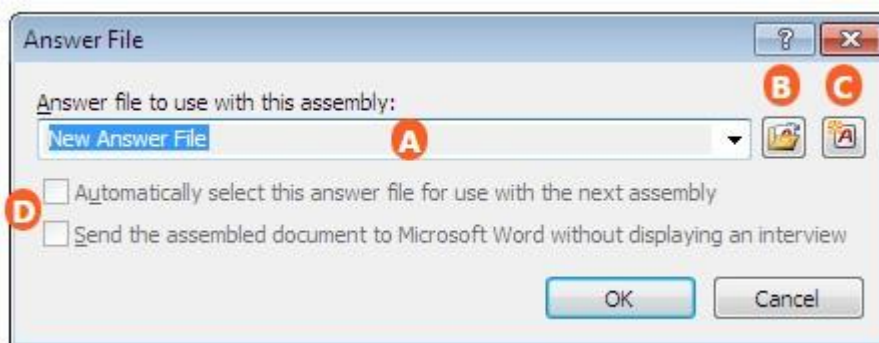
To assemble a document

1. At the HotDocs library window, select a template. (If you're assembling a form document, see [Introduction: Assemble a Form Document](#) for additional instructions.)
2. Click  **Assemble**. The **Answer File** dialog box appears. (You can also start an interview by double-clicking the template.)
3. Select an answer file (see [Select an Answer File for Assembly](#)), 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. (See [Navigate Through Answer-Gathering Dialogs](#).) (You can also advance to the next dialog by pressing **Alt+N**, **Enter**, or **Page Down**.)


After the final dialog, the **End of Interview** dialog identifies how many questions are unanswered. This dialog also provides options for working with the assembled document. See [Use the End of Interview Dialog](#) for specific details.


HotDocs updates the interview as you enter answers in a dialog. If you experience a significant delay when moving from one answer to the next, you can have HotDocs update the interview less frequently. (See [Update Your Interview Outline and Document](#).)



At a Glance: The Answer File dialog box






Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

When you click to assemble a template you will usually see the **Answer File** dialog box appear. Unless you have set a default answer file (see [Create a Default Answer File](#)) then the **Answer File** field  will show the option **New Answer File** and when you click **OK** it will start a blank answer file which you can choose to save during assembly or after assembling the template.

Clicking on the **Answer File** field  will allow you to choose from a drop-down list of recently used answer files.

If you would like to use a previously saved answer file click on the  **Open Answer File** button  where you will be taken to **Answer File Manager** to choose the file you would like to use for this assembly.

Once you have chosen an answer file the two check boxes  ungray. The top check box allows you to have HotDocs automatically select this answer file the next time you assemble this template. The bottom check box allows you to send the assembled document to Microsoft Word without displaying the interview. This is useful if you have a completed answer file that you don't wish to edit as HotDocs will immediately create the document.

If after selecting an existing answer file you decide you would instead like to use a new answer file then clicking the  **New Answer File** button  will return the **Answer File** field to displaying **New Answer File**.





To find out more about selecting an answer file follow the link below:

- [Select an Answer File for Assembly](#)

Select an Answer File for Assembly

When you assemble a document, you must choose whether to use a new answer file or an existing file. After you complete each interview, HotDocs can save your answers for use with other assemblies.


To select an answer file

1. At the HotDocs library window, select a template, then click  **Assemble**. The **Answer File** dialog box appears.
2. Accept the suggested answer file or change the answer file by choosing one of the following options:
 - Click the  **Open Answer File** button to open the **Open Answer File** dialog box where you can choose an existing answer file. After making your selection, click  **Open**.
 - Click the  **New Answer File** button to create an empty, untitled answer file.
 - Select **Automatically select this answer file for use with the next assembly** to have HotDocs suggest this answer file for all subsequent documents you assemble.
3. At the **Answer File** dialog box, click **OK**. The assembly window appears

You can also use Windows Explorer to access your answer files. See [Introduction: Use Answer Management](#).





Some templates may have an answer file assigned by the template provider. For templates like this, the **Answer File** dialog box does not appear.

Assemble an Interview Template

An interview template does not produce an assembled document. Instead, it gathers and (and sometimes automatically saves) information (such as court, attorney, or client information) that can be used in assembling other documents. An interview template is distinguished from other templates in the library by its icon: .

For example, a template library includes an interview template named *Client Information*. This template gathers personal information about each client—such as name, address, gender, and birth date. This information may be needed in other templates in the library. Before you ever assemble any of these other documents, you could assemble the interview template and create a set of answers. Then, whenever a dialog in another template requires client information, you can access the answers you've already entered.

To assemble an interview template


1. At the HotDocs library window, select the  **interview template** and click  **Assemble**. The **Answer File** dialog box appears. (If the template is already associated with an external answer source, you will not be prompted to select an answer file. Skip to step 3.)
2. [Select an answer file](#), then click **OK**.
3. Answer the questions in each dialog, clicking  **Next** or  **Previous** to move between dialogs.
4. At the end of the assembly, HotDocs may prompt you to save your answers in an answer file.
 - If this prompt appears, click **Save** or **Save As** to view the **Save Answer File** dialog box, where you can save the answers you've provided. Or, click **Don't Save** to discard the answers.
 - If this prompt doesn't appear, the template is probably associated with an external answer source, so HotDocs automatically saves the answers to that answer source.
5. Close the assembly window.

Assemble a Document Without Showing an Interview

You can assemble a document without answering any questions in the interview. When you do this, HotDocs uses the answer file you specify and assembles the document. Depending on which *Finish Interview Action* options you have selected, you can choose where you will view the assembled

document—either in the word processor (text templates), HotDocs Filler (form documents), or at the **Document** tab of the assembly window. (See [Control What Happens When You Finish an Interview](#).)

To assemble a document without viewing the interview



1. At the HotDocs library window, select one or more templates.
2. Click  **Assemble**. The **Answer File** dialog box appears.
3. Select an answer file. (See [Select an Answer File for Assembly](#).)
4. Select **Send / Go directly to ... without displaying an interview** and click **OK**. HotDocs assembles the document using the answers in the answer file you selected. It then displays the assembled document in the application specified at [HotDocs Options](#).

Overlay Answers in the Current Answer File

When you assemble a document, you can use answers from an existing answer file and overlay them in the current answer file, overwriting any existing answers in the current answer file.

For example, perhaps you have an answer file that contains only client-specific answers, such as names and addresses. You can use these answers to assemble several related documents. However, to use this answer file in the traditional way (selecting it at the **Answer File** dialog box), you would most likely add answers to the file, making it less useful in assembling other documents. To make the file useful for multiple templates, you can select a new or existing answer file at the **Answer File** dialog box, and then use the answer file that contains your client-specific answers as an overlay answer file. Answers you enter or change during the interview are saved to the current answer file—not the overlay answer file.

To use an overlay answer file during assembly

1. At the HotDocs library window, select a template and click  **Assemble**. The **Answer File** dialog box appears.
2. [Select an answer file](#), and click **OK**. The assembly window appears.
3. Click **File**, then click **Overlay Answers**. The **Open Answer File** dialog box appears.
4. Select an answer file to overlay, and click the  **Open** button. The assembly window appears again, showing information from the overlay answer file; however, the answer file you selected in step two is still assigned (as seen in the **Current Answer File** drop-down list).


HotDocs 5 users: You can no longer save or load pattern answer files. Instead, to merge specific answers from one file into the current answer file, use the **Overlay Answers** command at the **File** menu of the assembly window. To distinguish overlay answer files from regular answer files (as you could with pattern answer files), create a separate folder in [Answer File Manager](#) and store your overlay answer files there.

You can also specify an [overlay answer file](#) at the command line.

Assemble Multiple Documents

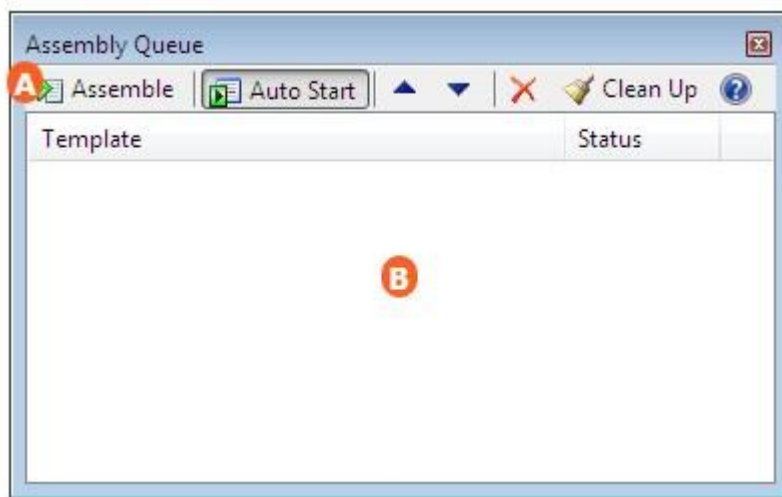
You can select multiple templates or clause libraries, and then start one assembly process that will address each template. Each template or clause library will create a separate document, using the same answer file, unless you select a different answer file during the interview. (See [Switch Answer Files During Assembly](#).)

To assemble multiple documents


1. At the HotDocs library window, press **Ctrl** or **Shift**, then select all the templates and clause libraries you want to assemble.
2. Click  **Assemble**. The assembly queue status box (located in the status bar of the assembly window) displays how many assemblies are waiting, and the **Answer File** dialog box appears.
3. Select an answer file and click **OK**. ([Select an Answer File for Assembly](#).) The assembly window appears.
 - If the item is a template, the first answer-gathering dialog is shown. (See [Assemble a Text or Form Document](#).)
 - If the item is a clause library, the clause library is shown. (See [Select Clauses During an Interview](#).)
4. Provide answers or select clauses for the interview.
5. After completing the interview, the *End of Interview* dialog notifies you that other assemblies are ready to begin.
6. Close the assembly window, and begin assembling the next document.

The assembly queue and assembly queue status box (located in both the library and the assembly window status bars) can help you track the assembly of each document. See [Use the Assembly Queue](#) for details.








At a Glance: The Assembly Queue Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

When you have the assembly window open you can click on the  **Assembly Queue** button to view the **Assembly Queue** dialog box.

At the top of the dialog is the **Assembly Queue** toolbar **A** where you can access the following options:

-  **Assemble:** Manually starts the next assembly. (This option is available if Auto Start is not selected.)
-  **Auto Start:** Switches the assembly mode between automatic (where HotDocs automatically assembles documents listed in the queue) and manual (where you must manually click the Assemble button for each document listed in the queue).
-  **Move up:** Moves the selected entry closer to the top of the queue.
-  **Move down:** Moves the selected entry closer to the bottom of the queue.
-  **Delete:** Removes the selected template from the assembly queue. You can only delete templates that are not currently being assembled.
-  **Clean up:** Removes entries for assemblies that have been completed.
-  **Help:** Opens the relevant page of the HotDocs Help File.





Below that is the **Assembly Queue List** **B** where you can see the templates selected for assembly and their current assembly status. Templates will be assembled in this order, so change the order, select a template and click the **Move Up** or **Move Down** button.

To learn more about the Assembly Queue follow the link below:

- [Use the Assembly Queue](#)

Use the Assembly Queue

The assembly queue shows a list of templates—some that may be waiting to be assembled and some that may have recently been assembled. Using the assembly queue, you can start and stop assemblies, change the assembly order, and change how assemblies are started. In addition, the assembly queue status box (which is located in the status bar of the template library window and assembly window) also shows when templates are queued for assembly.

The assembly queue provides two methods for starting assemblies: auto mode and manual mode. These methods are controlled by the  **Auto Start** button in the assembly queue toolbar. When assembling multiple templates and  **Auto Start** is selected, HotDocs automatically starts each assembly, following the order in which the templates are added to the queue. When assembling multiple templates and  **Auto Start** is not selected, HotDocs starts the first assembly, but then waits for you to start each subsequent assembly by clicking the  **Assemble** button on the assembly queue toolbar.



As templates are added to the assembly queue, they are assigned a status, which helps you identify each template's stage in the assembly process. (For a description of template statuses, click [here](#).)

To add items to the assembly queue









HotDocs will allow you to assemble only one document at a time. If you are currently assembling a document and you attempt to assemble another one, HotDocs will add it to the assembly queue and it won't be assembled until the current assembly is complete. If there are multiple templates in the queue, HotDocs will assemble them in the order they are added.

1. At the **End of Interview** dialog select the option to assemble the template.
2. If another template is currently being assembled, the **Multiple Assemblies** dialog box will appear.
3. Click Yes to add the template to the **Assembly Queue**.
4. You can also tick the check box at the bottom of this dialog, **Don't warn me about multiple assemblies again**, to keep this dialog box from appearing. The next time you attempt to assemble a document when HotDocs is already busy assembling, the template will be added to the queue.

To work with templates in the assembly queue

1. At the HotDocs library window, click the  **Assembly Queue** button. The **Assembly Queue** dialog box appears. (You can also select **Assembly Queue** (**Tools** menu) or double-click the assembly queue status box in the status bar of the template library window.)
2. At the library window, select multiple templates and click  **Assemble**. Entries for each template appear in the assembly queue. Then the **Answer File** dialog box appears. (See [Assemble Multiple Documents](#).)
3. At the **Answer File** dialog box, select an answer file and click **OK**. (See [Select an Answer File for Assembly](#).) The first dialog appears in the assembly window.

4. Throughout the interview process, perform any of the following tasks using the following commands in the Assembly Queue:

To	Do This
Change the order in which pending or confirmed templates are assembled	Select the item in the assembly list and click either the  Up button or the  Down button. (Templates that are currently assembling cannot be moved in the queue.)
Remove a confirmed assembly	Select the item in the assembly list and click the  Delete button. (Templates that are currently assembling cannot be removed from the queue.)
Change whether assemblies start automatically or manually	Click the  Auto Start button. When Auto Start is turned off, clicking the  Assemble button at the HotDocs library only starts the first assembly. To begin subsequent assemblies, you must also select an entry in the assembly queue and click the  Assemble button there.
Manually start an assembly	Click the  Assemble button.
Remove the entries for all completed assemblies from the Assembly Queue	Click the  Clean Up button.

When HotDocs closes, it remembers the assembly queue display setting. If you close HotDocs while the queue is showing, the queue will automatically be displayed the next time you open HotDocs.

You can have completed assemblies automatically removed from the assembly queue. See [Include List of Completed Assemblies in Assembly Queue](#) for details.

Assemble a Clause Library from the Template Library

A clause is a section of text, usually a commonly used paragraph, and a clause library is a collection of clauses. You can select clauses from a clause library and use them to assemble text documents.








In HotDocs, you can view a clause library and select clauses for inclusion in a document both at the template library and during the interview for a text template.

- When a clause library is referenced in a template library, you assemble the clause library and then choose where the assembled clause text is merged. You can choose to send the assembled clauses to a new, empty document; copy the assembled text to the Windows Clipboard (so you

can paste it into an existing document); or paste the assembled text directly into an open word processor document. (Instructions for this method are included below.)

- When a clause library is [asked during the interview](#) of a text template, the clause text is automatically inserted into that assembled document.






To assemble a clause library from the template library

1. At the HotDocs library window, select a clause library and click  **Assemble**. The **Answer File** dialog box appears.
2. [Select an answer file](#) and click **OK**. The clause library appears in the dialog pane.
3. **(Optional)** Perform either of the following tasks:
 - Select the **Find** check box to find all of the clauses with specific text in their title or description. In the text field, type the text for which you are searching.
 - Click  **Preview** to view the clause text in a pop-up dialog box. To return to the clause library, click the **X** in the upper-right corner of the pop-up dialog box.
4. From the **Available** list, select each clause you want to use and click  **Select** to add it to the **Selected** list. To remove a clause, select it, then click  **Remove**. (Press **Ctrl** or **Shift** to select multiple items.)
5. **(Optional)** Reorder the clauses in the **Selected** list by selecting and dragging a clause to the desired position. The clauses will be inserted into the document in this order.
6. When all the necessary clauses are in the **Selected** list, click  **Next** on the navigation bar.
7. Answer any questions in the interview. Once all questions are answered, complete any of the following steps:
 - Click the  **Send the assembled document to the word processor** button (or press **F11**) to open the assembled document in your word processor.
 - Click  **Paste the assembled document into the open word processor document** (or press **Shift+F11**) at the *End of Interview* dialog. This will insert the assembled document into an open word processor document.
 - **Microsoft Word users:** Choose **File > Send Document To > Clipboard** (or press **Ctrl+F11**) to place a copy of the document on the Windows Clipboard. You can then open an existing document and paste the text in the desired location.

Navigate Through Answer-Gathering Dialogs

To assemble a document, you must answer interview questions. To help you go through the interview easily, you can use the navigation bar, located at the bottom of the dialog pane.





As you answer questions, the icons in the interview outline change color. This can help you identify how much of the interview is left to complete:

-  None of the questions in the dialog are answered.
-  At least one of the questions in the dialog is answered.
-  All of the questions in the dialog are answered.
-  Repeats the dialog, allowing you to enter more than one set of answers.
-  Allows you to enter a new set of answers in a list.

The final dialog in an interview is usually the **End of Interview** dialog, which reports how many questions are unanswered. This dialog is [customizable and also provides options for working with the assembled document](#).

To navigate through HotDocs dialogs

1. At the HotDocs library window, select a template and begin [assembling the document](#).
2. The HotDocs assembly window appears. Complete any of the tasks using commands listed in the following table:

To	Do This
Enter an answer for the question	<p>Depending on the type of answer required, type a text or number answer, enter a date, select a check box, or choose an option from a list of options.</p> <p>When entering a multi-line text answer, you can control whether the Enter key inserts a line break or a paragraph mark in the assembled Word document. To enter a line break, simply press Enter. To enter a paragraph break, press Ctrl+Enter. (In some situations, the template developer may have specified which break to use.)</p> <p>When entering a patterned time of day, enter the hour first, then press the right arrow key to move past the colon to enter the minutes. You can also click the up and down arrows next to the answer field to select the hours and minutes.</p>
Move to another dialog in the interview outline	Click a dialog icon in the interview outline.
Go to the next or previous dialog	Click either the  Next Dialog button or the  Previous Dialog button. (You can also press Page Down/Page Up , or Alt+N/Alt+P .)
Go to the next dialog or the previous dialog	Click either the  Next Unanswered button or the  Previous Unanswered button. You can also press Ctrl+Page Up/Ctrl+Page Down .

that contains an unanswered variable

Go to the first or the last dialog in the interview

Finish the interview and view the assembled document

View additional information about a specific answer or the contents of a dialog

View where the answer is merged into the document (This option is available to Word users only.)



Hide the interview outline

Preview an assembled text document before sending it to the word processor

View an assembled form document


View a list of all questions in the template

View a list of all the questions and their

Click either the  **First Dialog** button or the  **Last Dialog** button.

Click the  **Finish Interview** button. (Where you view the assembled document depends on the **Finish Interview** action you've specified.

Click the  **View Resource** button.

Click the  **Go to Answer in Document** button. HotDocs displays the **Document** tab and moves the cursor to the first place in the document where the answer is merged. However, if you place your cursor in the answer field of an answer that is not directly used in the document HotDocs will not display the document tab and you will see an error message.

Clear **Interview outline** (**View** menu).

Click the **Document Preview** tab.

Click the **Form Document** tab.

Click the **Question Summary** tab.

Click the **Answer Summary** tab.


answers in the interview

HotDocs [updates the interview](#) as you enter answers in a dialog. If you experience a significant delay when moving from one answer to the next, you can have HotDocs update the interview less frequently.



Sometimes the format of your answer may be changed. To verify these changes, you can specify an option that [forces HotDocs to warn you of answer format changes](#) before moving to the next dialog.

To display the different tabs along the bottom of the window (instead of the top), clear **Tabs at Top** in the **View** menu.

View Resources During Assembly

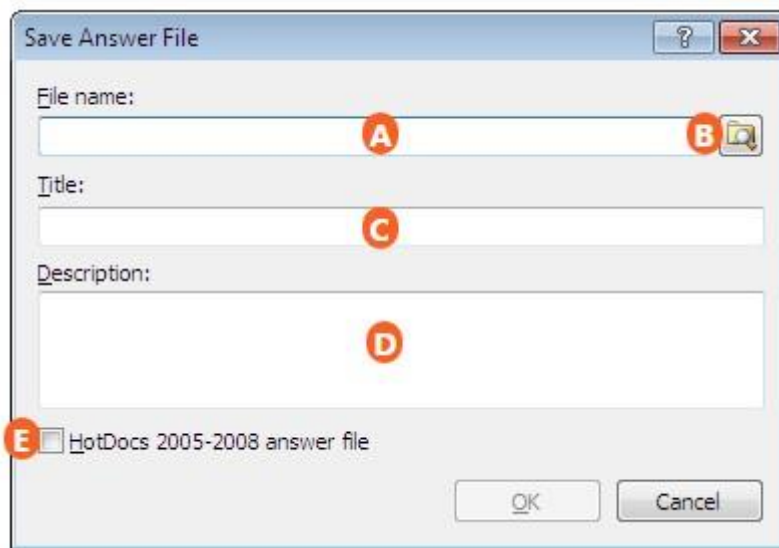
Template providers can include helpful information with dialogs and questions in the interview. When such information is available, it appears in the resource pane. (To view the resource pane, either choose **Resource Pane** (**View** menu) or click the  **Resource** button in the assembly window toolbar.)

To view resource information

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. Navigate to a dialog that shows a resource.
 - If the resource pane is already displayed, the information automatically appears there. (You can change the size of the resource pane by selecting the top border of the pane and dragging it up or down.)
 - If the resource pane isn't displayed, you can either click the  **Resource** button in the toolbar or click the  **Resource** button that appears next to the answer field.

[Resources help you answer questions in the interview. For help using HotDocs, see Get Help Using HotDocs.](#)

At a Glance: The Save Answer File Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

When you come to save an Answer File, either during assembly or after assembling a template, you will be presented with the **Save Answer File** dialog box.

In the first field **A** you can enter a file name for the answer file and using the **Browse** button **B** the right of this field you can change where the file will be saved on your computer. If you do not change where the file is to be saved it will be saved to the **Answers** folder in your **HotDocs** folder usually in **My Documents**.

In the next field **C** you can enter a Title for the answer file. This will be the name displayed when you see the answer file in **Answer File Manager** or when you use it in a HotDocs Interview.

In the last field **D** you can enter a brief description of the answer file. This will display with the answer file in **Answer File Manager** and may help you to identify the answer file you need the next time you come to use it.

Below these text fields is a check box **E**. Checking this box will have HotDocs save the answer file in a format that is compatible with older versions of HotDocs (see Compatibility of HotDocs 11 Files with Earlier Versions of HotDocs in the [Quick Start Guide](#)). This can be useful when you intend to share the answer file with someone who may be running a different version of HotDocs to you.


To learn more about saving answers files follow the link below:


- [Save an Answer File During Assembly](#)

Save an Answer File During Assembly


While assembling a document, you can save the answers you have entered. This allows you to save your work and perhaps start a different assembly without closing the assembly window. Saving answers also allows you to use the information you enter with other templates, thus saving you time.

To save answers during assembly

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. At the assembly window, click the  **Save Answers** button. If you are using an existing answer file, the new answers are saved. If you are using a new answer file, the **Save Answer File** dialog box appears where you can perform any of the following tasks:

To	Do This
Enter the file name	At the File name field, enter a name. When you click OK , the answer file will be saved to the default <i>Answers</i> folder and a reference to it will be added to Answer File Manager. To save the answers to a location other than the default <i>Answers</i> folder, click the  Browse button and navigate to the location.
Enter the title that identifies the answer file in Answer File Manager	At the Title field, enter a name or accept the suggestion HotDocs makes.
Add information to help identify the file	At the Description field, type notes about the answer file's purpose or contents. (The description will appear at the Properties tab of the Answer File Manager. When searching for specific answer files, you can search for text in the description.)
Save the answer file so it is compatible with versions of HotDocs earlier than HotDocs 2009	Select HotDocs 2005-2008 answer file . (See Compatibility of HotDocs 11 Files with Earlier Versions of HotDocs.)



See [Introduction: Use Answer Management](#) for information on using Windows Explorer instead of Answer File Manager.


The  **Save Answers** button may be disabled because the template provider wants to prevent the answer file from being altered. You can assemble a document using new answers, but when you close the assembly window, the new answers are automatically discarded.

Switch Answer Files During Assembly

While assembling a document, you may want to use another answer file. At any point during the interview, you can select a different answer file, then continue the interview using the new answers.

To switch answer files

1. At the HotDocs library window, select a template and begin assembling a document. (See [Assemble a Text or Form Document](#).)
2. During the interview, click  **Open Answers**. The **Open Answer File** dialog box appears. (Depending on the file management settings you have selected, a Windows Explorer dialog box or a window from your document management program may appear instead. See [Manage Answer Files](#).)
3. Select an answer file and click  **Open**.
4. If prompted to save the old answers, click **Save**, **Save As**, or **Don't Save**, depending on your needs. (See [Save an Answer File During Assembly](#).)
5. The assembly window appears again, using the newly selected answer file.

When viewing the answer library, you can sort the answer files. To do this, select a folder and click  **Sort**. To search for a specific answer file, select the **Find** check box, then type the text for which you are searching in the text field.

Use Repeated Dialogs During Assembly

Dialogs can be repeatedly asked to gather several sets of answers for the same questions. A repeated dialog can appear as a series of dialogs or as a spreadsheet.



Once you have created a list of answers, you can use commands in the toolbar to move records within the list.

You can change the way repeated dialogs are represented in the interview outline. (See [Display Repeated Dialogs Using a Special Icon](#).)

HotDocs updates the interview as you enter answers in a dialog. If you experience a significant delay when moving from one answer to the next, you can have HotDocs update the interview less frequently. (See [Update Your Interview Outline and Document](#).)

To enter answers in a series of dialogs

1. At the repeated dialog, enter answers for the questions.

2. Click the  **Add Another** button to add another repetition of the dialog to the series. The repetition number next to the dialog icon increases each time you enter a new set of answers. (You can also press **Alt+A** to add new repetitions to a list.)
3. To move to the next dialog after entering all the answers in the list, click  **Next** in the navigation bar. (You can also click on the next dialog icon in the interview outline, or press **Page Down** or **Alt+N**.)






When entering a list of answers within another list of answers, you can press **Alt+Left Arrow** to return to the parent dialog. (You can also choose **Parent Dialog** from the **Navigate** menu.)

To enter answers in a repeated spreadsheet

1. At an answer-gathering dialog that includes a repeated dialog formatted as a spreadsheet, click in the first spreadsheet cell and enter your answer.
2. Press **Tab** to move to the next cell in the row (or use the mouse to click in the next cell) and enter your answer.
3. Repeat this process for each answer.


To work with repeated answers

1. Answer questions in the repeated dialog.
2. Select the record with which you want to work. (If you are editing records in a dialog series, select the dialog icon in the interview outline. If you are editing records in a spreadsheet, click on the row you want to edit.)
3. Use the options described in the following table to complete additional tasks:

To	Do This
Remove a specific dialog from the list of answers	Select the dialog you want to delete and either click the  Delete Repetition button, or choose Delete Repetition from the Edit menu.
Insert a new dialog between existing dialogs	Either click the  Insert Repetition button, or choose Insert Repetition from the Edit menu.
Move an existing dialog up in the list of answers	Select the dialog you want to move and click the  Move Repetition Up button (located on the Edit toolbar).
Move an existing dialog down in the list of answers	Select the dialog you want to move and click the  Move Repetition Down button (located on the Edit toolbar).
Sort the contents of a spreadsheet dialog in alphanumeric order	Click in the column on which you want to sort and click the  Sort button (located on the Edit toolbar). The Sort Spreadsheet dialog box appears where you can specify your sorting preferences. If the template developer has specified any sorting options, answers will be merged in

Edit the contents of the row in a regular dialog

the document using those sort options. Otherwise the sort order you specify here will be used in the assembled document.

Click in the row you want to edit and either click the  **Edit Row** button, or right-click and choose **Edit Row** from the shortcut menu.

Use Inserted Dialogs During Assembly

In some templates, one dialog may contain other dialogs. For example, a dialog may ask for information about a client; then, if the client is married, an inserted dialog may ask for information about the spouse.

To use an inserted dialog

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document.](#))
2. Navigate to a dialog that contains an inserted dialog.
3. Select the inserted dialog and provide information for the answer fields, based on the following information:
 - **If the dialogs are not grouped:** For each inserted dialog, HotDocs displays an icon in the dialog pane and in the interview outline. If you don't answer questions in the inserted dialogs, HotDocs counts them as unanswered questions and warns you about them.
 - **If the dialogs are grouped for single selection:** HotDocs adds an option button next to each inserted dialog icon. Until you select one of the option buttons or click the child dialog icon or title, no icon for the inserted dialog appears in the interview outline. If you don't select an option button and don't answer any questions in the inserted dialogs, HotDocs doesn't count them as unanswered questions.
 - **If the dialogs are grouped for multiple selection:** HotDocs adds a check box next to each inserted dialog icon. Until you select the check boxes or click the child dialog icon or title, no inserted dialogs appear in the interview outline. If you don't select any check boxes and don't answer any questions in the inserted dialogs, HotDocs doesn't count them as unanswered questions.




You can hide all inserted dialogs in the interview outline by selecting **Collapse All (View menu)** or by pressing **Alt+-**.

HotDocs updates the interview as you enter answers in a dialog. If you experience a significant delay when moving from one answer to the next, you can have HotDocs update the interview less frequently. (See [Update Your Interview Outline and Document.](#))

View Individual Rows in a Spreadsheet

Some documents may require a list of information. To generate a list, template providers create a repeated dialog, which may be formatted as a spreadsheet. This format may be awkward to work with when there are large numbers of questions (or columns)—the spreadsheet may extend beyond the viewable area. However, to see all the questions at once, you can view one row of the spreadsheet in dialog format.

To answer a single set of answers in a spreadsheet

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. At the assembly window, navigate to a repeated dialog that is formatted as a spreadsheet.
3. At the spreadsheet, click  **Edit Row**. A pop-up interview appears. (You can also right-click and choose **Edit Row** from the shortcut menu.)
4. Type answers in the answer fields, then click  **Next**. The answers are saved and a new set of answer fields appears.
5. After providing all the necessary answers, close the pop-up interview by clicking  **Finish**.





Select Clauses During an Interview

A clause is a section of text, usually a commonly used paragraph, and a clause library is a collection of clauses. You can select clauses from a clause library and use them to assemble text documents.

In HotDocs, there are two places where you may view a clause library and select clauses for inclusion in a document—at the template library or during the interview for a text template:


- When a clause library is referenced in a template library, you assemble the clause library and then choose where the assembled clause text is merged. You can choose to send the assembled clauses to a new, empty document; copy the assembled text to the Windows Clipboard (so you can paste it into an existing document); or paste the assembled text directly into an open word processor document. (See [Assemble a Clause Library from the Template Library](#) for instructions on using this method.)
- When a clause library is asked during the interview of a text template, the clause text is automatically inserted into that assembled document. (Instructions for this method are included below.)

To select clauses from an inserted clause library


1. At the HotDocs library window, select a template that contains an inserted clause library and begin assembling the document. (See [Assemble a Text or Form Document.](#))
2. Navigate to the dialog where the clause library is located. The clause library appears in the dialog pane.
3. Optionally, perform either of the following tasks:
 - Select the **Find** check box to find all of the clauses with specific text in their title or description. In the text field, type the text for which you are searching.
 - Click  **Preview** to view the clause text in a pop-up dialog box. To return to the clause library, click the **X** in the upper-right corner of the pop-up dialog box.
4. From the **Available** list, select each clause you want to use and click  **Select** to add it to the **Selected** list. To remove a clause, select it, then click  **Remove**. (Press **Ctrl** or **Shift** to select multiple items.)
5. Optionally, reorder the clauses in the **Selected** list by selecting and dragging a clause to the desired position. The clauses will be inserted into the document in this order.
6. When all the necessary clauses are in the **Selected** list, click  **Next** on the navigation bar.
7. Answer any questions in the interview.

Answer Date Questions

To make it easier to answer Date variables, HotDocs provides three different ways to enter a date:

- Type the letter **t**, then move to the next answer field. HotDocs converts the letter to the current date.
- Type a date using a common format, such as **MM/DD/YYYY**. HotDocs converts the format to match the format specified for the template.
- Click the  **Calendar** button to access the **Calendar** dialog box. Then use the **Next** or **Previous** arrows to find the desired month and year. Select a day, and click **OK**.

HotDocs requires a four-digit year for Date variables. However, you can enter a two-digit year, and then let HotDocs convert it to a four-digit year. You can control which years are converted to 1900-century dates, and which are converted to 2000-century dates. See [Control How HotDocs Handles Two-Digit and Four-Digit Years](#).

The  **Calendar** button is not available when a Date variable is in a dialog repeated as a spreadsheet. However, if you click **Edit Row**, the pop-up interview will show the calendar button.

HotDocs may format dates in the interview different from the way they will appear in the assembled document. The appearance in the interview is controlled by a setting in the HotDocs

Options dialog box. (See [Change the Way Dates Appear in Answer Fields.](#)) When a date appears in the document, however, it is formatted according to the format assigned to that variable.

HotDocs updates the interview as you enter answers in a dialog. If you experience a significant delay when moving from one answer to the next, you can have HotDocs update the interview less frequently. (See [Update Your Interview Outline and Document.](#))

View an Answer's Variable Name

Sometimes as you complete an interview, you may need to ask the template provider about a specific question asked in the interview. Being able to identify the question by variable name may help the template provider better understand the kind of information you need. You can have HotDocs show you the name of the variable.

To view the variable name for a question in the interview

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document.](#))
2. Navigate to the dialog that contains the question.
3. Place your cursor in the answer field, right-click, and choose **Variable Name** from the shortcut menu. A message box appears, showing you the variable name.

Use the End of Interview Dialog

The **End of Interview** dialog appears after the last dialog in each interview. At this dialog, you can view a report of unanswered questions, as well as access commands for working with the assembled document.

To work with assembled documents at the End of Interview dialog

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document.](#))
2. After completing the interview, the **End of Interview** dialog appears. The following table describes the commands available here:

To	Do This
Return to the first unanswered question in	Click  Go to the first unanswered question in the interview.


the interview

Send the assembled text document to the word processor so you can view it in its final format

Click  **Send the assembled document to the word processor.**

You can choose the default word processor to which assembled documents are always sent, or you can let HotDocs choose the word processor each time based on the file type. See [Change Your Default Word Processor](#).

View the assembled form document

Click the  **View the assembled form document at the Form Document tab** button. (See [View the Assembled Form Document](#).)

Insert the assembled document into an open word processor document

Click  **Paste the assembled document into the open word processor document.**

This command will paste the document text into a document already open in your word processor. If there is not a document already open, HotDocs will create a new document.

Copy the document text to the Clipboard (only available when assembling Microsoft Word documents)

Click  **Copy the assembled document to the Clipboard.**

For DOCX templates the assembled document is copied in plain text format.

Save a copy of the assembled document

Click  **Save the assembled document in a file.**

Save an assembled text or form document as a PDF file

Click  **Save the assembled document as a PDF.**

Close the assembly window without saving a copy of the assembled document

Click  **Close this window without saving the assembled document.**

Choose which buttons are displayed in the *End of Interview* dialog

Click  **Choose which buttons are displayed on this dialog.**

When you assemble multiple documents, the *End of Interview* dialog also notifies you that other assemblies are ready to begin.

To keep the *End of Interview* dialog from appearing, clear **End of Interview Dialog** at the **View** menu of the assembly window. Then, when you click **Next** at the last dialog in the interview, HotDocs will either send the assembled document to the word processor or HotDocs Filler, or it


will display the **Document** tab of the assembly window. To specify which action HotDocs performs, see [Control What Happens When You Finish an Interview](#).

You can choose which options appear in the *End of Interview* dialog. See [Customize the End of Interview Dialog](#).

Spell Check Answers

You can spell check text answers you have entered at any time during an interview.

To spell check your answers

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click the  **Check Spelling** button. If HotDocs finds any unrecognized words, the **Check Spelling** dialog box appears. In the **Answer being checked** field, HotDocs shows a section of the text that contains the misspelled word, which is highlighted. Options for working with the misspelled word appear below it.
3. Make your selection, based on the options described in the following table:

To	Do This
Ignore the current instance of the word and continue spell checking	Click Ignore .
Ignore all instances of the word and continue spell checking	Click Ignore All .
Correct only the current instance of the word and continue spell checking	Select an existing replacement from the Change to list (or type the replacement in the Change to field) and click Change .
Correct all instances of the misspelled word and continue spell checking	Select an existing replacement from the Change to list (or type the replacement in the Change to field) and click Change All .
Add the word to your personal dictionary so that the spelling checker will not question the word again	Click Add .
Display additional spelling alternatives for the unrecognized word	Click Suggest . A deeper search takes longer but produces better possible replacements. If the button is unavailable, HotDocs is searching at the

Change your spell checking options, such as which words the spelling checker looks at and how it determines whether a word is a possible replacement

deepest level.

Click **Options**. (You can also change your options at the **HotDocs Options** dialog box. See [Change Your Spell Checking Options](#).)

Working with Assembled Text Documents


Preview the Assembled Text Document




After assembling a text document, you can print the document, send it as an e-mail attachment, or save it as a word processor file. However, once you perform any of these actions, the document is no longer associated with HotDocs. That means any changes you make to the text of the document will not be updated in the answer file or template. Because of this, it is helpful to preview the assembled document in the assembly window and make sure the information in the document is accurate before you perform any of the aforementioned tasks.

While the information in the **Document Preview** tab is shown accurately, the document may not be formatted correctly, particularly in WordPerfect documents. To view the actual formatting, send the document to the word processor. (See [Send the Assembled Text Document to the Word Processor](#).)

Some template providers may not allow you to edit answers or text at the **Document Preview** tab. If not, these commands will be disabled.

To preview an assembled text document

1. At the HotDocs library window, select a template and begin the assembly. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click the **Document Preview** tab. The assembly window changes to show a preview of the document. By default, answers that have not been entered are marked with asterisks (for example, *****Employee Name*****). You can choose a different unanswered format, however. See [Format Unanswered Variables in a Document](#) for details.
3. (Word users) Optionally, to edit an answer or document text, click the  **Highlight Fields** button, then double-click on an answer field or section of editable text. (See [Edit Answers at the Document Preview Tab](#) and [Edit Document Text at the Document Preview Tab](#) for details.)
4. Once you have verified that the document is correct, use any of the following commands to work with the assembled document:

To	Do This
Save the assembled text document to disk	Click the  Save Document button. (See Save an Assembled Text or Form Document .)
Send the assembled text document to the word processor so you can see it in its final format	Click the  Send Document button. (See Send the Assembled Text Document to the Word Processor .)
Print the assembled text document	Click the  Print Document button. (See Print an Assembled Text Document or Print an Assembled Form Document .)
Close the assembly window	Choose Close (File menu)

If an assembled text document contains any cross references, including a table of contents or index, you may need to update the references once you send the document to the word processor. To do this, select all of the document text (press **Ctrl+A**) and then press the **F9** key.

Edit Answers at the Document Preview Tab

The ability to edit answers at the **Document Preview** tab is available to Microsoft Word users only. Additionally, this option is available only if the template provider has allowed it.




If you are viewing the **Document Preview** tab, you can edit answers you've entered. Additionally, you can move from an answer in the document to its question in the interview and vice versa. Seeing answers in the context of the document helps you pinpoint errors and makes it easy for you to correct them without having to go back to the interview.












To help you review answers in the document, you can use the Document Navigation Bar. Just like the Interview Navigation Bar, this toolbar can help you move between answers, unanswered fields, and matching answers.



Some template providers may prohibit you from changing answers at the **Document Preview** tab. If so, the buttons and commands that control this feature will be disabled.

To change answers while previewing the document

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click the **Document Preview** tab. The assembly window changes to show a preview of the document.

3. Click the  **Highlight Fields** button. This assigns colors to both answered questions and unanswered questions in the document. (You can change the default colors assigned to answered fields as well as unanswered fields. See [Set Properties for Viewing Answers and Editable Text in the Assembled Document](#).)
4. Double-click on an answer field. A pop-up interview appears, showing the dialog in which the question is used.
5. Change your answer and click  **Next** or  **Finish**. The pop-up interview closes and the answer is updated in the document.
6. Use any of the following commands to help you edit answers in the document:

To	Do This
Jump to the place in the interview where the question is asked	<p>Place your cursor in the answer field and click the  Go to Answer in Interview button. You can also right-click on the answer field and select Go to Answer in Interview from the menu.</p> <p>While viewing the Interview tab, you can go to the place in the document where the answer is merged. To do this, place your cursor in the answer field and click the  Go to Answer in Document button.</p> <p>Because of scripting in the template, sometimes you will not be able to move between the Interview and Document tabs in this manner. In the Document tab, if you place your cursor in the answer field of an answer generated from a computation, the  Go to Answer in Interview button in the tool bar will be greyed out. If you right-click in the answer field the menu will show Computed Value and you will be unable to select it. Similarly, in the Interview tab, if you place your cursor in the answer field of an answer that is not directly used in the document HotDocs will not display the document tab and you will see an error message.</p>
Move between answers in the document	<p>Click  Next or  Previous to move to the next or previous answer in the document.</p> <p>Click the  Next Unanswered or  Previous Unanswered button to move to the next unanswered or previous unanswered question in the document.</p> <p>Press Ctrl+M or Ctrl+Shift+M to move between matching answers in the document (for example, those answers in the document that are exact matches). (You can also press Shift as you click the  Next or  Previous button.)</p> <p>Click  End or  Beginning to go to end of the document or the beginning of the document.</p>

If you experience a delay when changing answers in your document, click the  **Document Instant Update** button (so it isn't pressed in). Then, when you change an answer, HotDocs will just update the field you are editing (and any other fields that merge the exact same answer). Be aware, however, that turning  **Instant Update** off may cause some of the information in the

If the template provider has allowed it, you can also edit the text of the document. See [Edit Document Text at the Document Preview Tab](#) for details.

Document Text Editor

Save & Close | Copy | Paste | Undo | Redo | Cut | Find | Print | Spell | ABC | Cancel | Help

















Normal | Arial | 10 | B | I | U | List | Align | Indent | Outdent | Link | Unlink

1 2 3 4 5 6

B

The **Document Text Editor** will appear when you click on editable document text while on the **Document Preview** tab of the HotDocs Interview.

The Toolbar **A** itself is split into two parts. The lower part has standard word processor tools such as font, styles and justification. The upper part of the toolbar has more specific HotDocs buttons including:

-  **Save and Close:** Saves your changes, closes the Document Text Editor, and merges the new text in the assembled document.
-  **Restore Original Text:** Discards any changes you've made to the text and restores the original document text.
-  **Print:** Prints a copy of the text you are editing
-  **Undo:** Removes any changes you have made to the script.
-  **Redo:** Reapplies any changes you have made to the script.
-  **Cut:** Removes the selected text and copies it to the Clipboard.
-  **Copy:** Copies the selected text to the Clipboard.
-  **Paste:** Pastes the selected text on the Clipboard at the cursor position in the script.
-  **Find:** Displays the Find dialog box where you can specify the word or text string for which you are searching.
-  **Find Next:** Finds the next instance of the word or text string for which you are searching.
-  **Find and Replace:** Searches for a specific word or text string and replaces it with word or text string you specify.
-  **Ruler Guide:** Show or hide the ruler guide below the toolbar.
-  **Paragraph Marks:** Show or hide the paragraph marks in the editable text. HotDocs always adds an extra paragraph mark to the end of editable text which cannot be deleted.
-  **Spell Check:** Checks the spelling within the Document Text Editor only.
-  **Cancel:** Closes the Document Text Editor without saving any changes.
-  **Help:** Opens the relevant page of the HotDocs Help File.

To learn more about using the document text editor follow the link below:

- [Edit Document Text at the Document Preview Tab](#)

Edit Document Text at the Document Preview Tab

The ability to edit the text of an assembled document is available to Microsoft Word users only. Additionally, this option is available only if the template provider has allowed it. (You can tell if the developer has made text editable by the color of the document text. By default, editable text is green.)




After you finish answering questions in an interview and before you send the document to the word processor or save it, you should review it. As you do, you may see that you need to change the language of a particular paragraph, or you may need to change a word or phrase to fit your particular needs. If the template developer has allowed it, you can edit the document text while viewing the **Document Preview**

tab. Changes you make can be saved in an answer file so that if you reassemble the document, those changes will be reapplied. (You can always send the document to the word processor and make the changes there. However, those changes are specific to the word processor and will not be saved to HotDocs.)

When you edit the text of the assembled document, the text appears in a pop-up window called the **Document Text Editor**. This editor provides many of the text-editing tools you need, including font options, spell checking, printing, and copying and pasting. As you edit, you can add new text or remove existing text. You can also change the formatting of text.

You cannot edit variable (or answer) fields at the **Document Text Editor. To edit answers, return to the assembly window and make the change at the **Interview** tab.**


To edit the text of the document

1. At the HotDocs library window, select a Microsoft Word template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click the **Document Preview** tab. The assembly window changes to show a preview of the document.
3. Click the  **Highlight Fields** button. Text in the document that can be edited changes color.
4. Place your cursor in an editable section of text and click the  **Edit Document Text** button (or double-click on the text). The **Document Text Editor** appears. (If there are multiple sections of text you can edit, HotDocs may ask you which section you want to edit.)
5. Edit the text using the commands in the **Document Text Editor** toolbar. (See Document Text Editor Toolbar for a description of each command.)
6. When you are finished making your changes, click  **Save and Close**. The editor closes and your changes are merged in the assembled document.

When you are finished reviewing the document, you can save your answers and the changes you made to the document are saved to the answer file. Then, if you reassemble the document using that answer file, the document will update with the changes you made.

To move between sections of editable text, click the  **Next Editable Text** or the  **Previous Editable Text** buttons in the navigation bar.

You can choose specific colors for marking editable and edited text in the document. See [Set Properties for Viewing Answers and Editable Text in the Assembled Document](#).

When viewing the document in the **Document Text Editor**, if you click the  **Show Codes** button, you will see an extra paragraph mark at the end of the document. This paragraph mark is merged by the text editor and will be deleted when you save your changes and the text is inserted back into the document. Because of this, do not modify the paragraph mark.

View an Assembled Document in Markup View

If you are not a template developer, please [click here for a brief explanation of template development terms](#). Understanding these terms will help you understand how the assembled document is marked up.

As you assemble Microsoft Word documents, there may be times when you want to assemble only a partial document and then submit it to an attorney or peer for revisions or corrections. To make the document easier for a non-HotDocs user to review, you can change the formatting of the document to Markup View and then provide the reviewer a copy of it.

When displaying markup, HotDocs replaces unanswered fields and instructions in the document with markup, which includes markers (such as brackets) and variable names. How the resulting markup fields look depend on the type of fields they are:

- **Answer fields:** By default, answer fields are marked using brackets. If the template developer has assigned a comment to the variable, the comment text may be used as the field name. If no comment is used, HotDocs will use either the title or the name the template developer assigned to the variable.
- **Conditional and repeated text blocks:** By default, conditional and repeated text blocks are marked using brackets. If a comment is assigned to these text blocks, the comment can be merged in the field label. If no comment is assigned, HotDocs will simply merge the field markers around the text block. The text block can be marked using an annotated footnote or endnote, depending on your preferences.
- **Insertion fields:** HotDocs will merge the file name of the template being inserted.

Once you assemble the document using as many answers as needed, you can switch to Markup View and save a copy of the document. You can then provide a copy of it to the reviewer.

To view a document in Markup View

1. Define the [Markup View options](#) you want to use in the document.
2. Assemble the Word document for which you want to generate markup.
3. Answer only the questions whose answers you want to appear in the assembled document. Leave all other questions unanswered. (These unanswered questions are the fields that will be marked using the scheme you define in step 1.)
4. Click on the **Document Preview** tab to switch to the preview pane.
5. Choose **Markup View** (**View** menu). The document changes to show the marked up document.
6. If you [send the document to the word processor](#) it will appear in markup view.

By default, merge fields in the document appear in color—red for unanswered questions and blue for answered questions. Sometimes, however, if an answer field is within a text block that is conditional or repeated, it appears (and remains) blue until the condition is met or the REPEAT

instruction is answered. Editable text likewise appears using the colors you've defined at HotDocs Options.

Additionally, merge fields in the document are italicized by default. If you've used international characters in your answers, the italicized version of the font used in the document may not display the foreign characters correctly. If this is the case, clear the **Italic** attribute for Markup View.


If the template developer has used merge fields in question prompts, those merge fields can be displayed as markup fields. Click the **View** menu, and then click **Markup View** while in the interview tab. Additionally, you can switch to Markup View while assembling form documents.

To view a non-marked up version of the assembled document again, clear **Markup View** (**View** menu).

Send the Assembled Text Document to the Word Processor

Once you complete an interview, you often want to view the document in its final format. For text documents, this must be done in the word processor.

To send the assembled text document to the word processor

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click the  **Send Document to the Word Processor** button. The word processor appears, showing the assembled document.
3. Using the word processor's tools, modify the document. Be aware, however, that any changes you make to answers in the document will not be reflected in the answer file.

If you have more than one word processor installed, you can choose which word processor will be used for viewing assembled documents. See [Change Your Default Word Processor](#) for details.

You can preview a text document at the **Document Preview** tab. While this preview shows the information in the document correctly, it may not be formatted correctly—particularly in WordPerfect documents.

If the template provider has allowed it, you may be able to edit the text of the document while still viewing it in the assembly window. For details, see [Edit Document Text at the Document Preview Tab](#) (Word users only).

If you are assembling a Plain Text Templates, the document will be sent to your default text editor instead of word processor.

Open a Saved Text Document for Editing

After assembling and saving a document, you can later edit the document using the appropriate program:

- Text documents are saved as word processor files (.DOCX, .DOC, .WPD, or .RTF). To edit these files, you must use a word processor.
- Form documents are saved as HotDocs form files (.HFD or .HPD). To edit these files, you must use HotDocs Filler. See [Edit a Saved Form Document](#) for instructions on completing these actions.

To open a saved text document using Windows Explorer

- Using Windows Explorer, locate the document file and double-click it. Your word processor appears, showing the saved document.

To open a saved text document using the word processor

- Using your word processor program's commands, locate and open the desired document file.


When an assembled document is saved, the file is separated from the template file, component file, and answer file that created it. This means that changes you make to a saved document are not reflected in the answer file used to assemble that document. Finally, if you do make changes to the document, you must identify and change each instance of the answer manually, including re-evaluating any computations or conditions affected by changed answers.

Print an Assembled Text Document

Many projects require you to print copies of assembled documents.

To print an assembled text document

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click the **Document Preview** tab. The assembly window changes to show a preview of the document.


3. Click the  **Print Document** button. The document is printed at the printer you specify.

Save an Assembled Text or Form Document

Some projects may require you to save an electronic copy of every document. Also, you may need to move the document to a disk or laptop, so you can take an editable, printable version of the document to another location.

When you save a text or form document, the file is separated from the answer file, so any changes made to a saved document are not saved to the answer file.


To save an assembled text or form document

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click the  **Save Document** button in the toolbar or at the **End of Interview** dialog. The **Save As** dialog box appears.
3. Navigate to the folder where you want the document to be saved.
4. In the **File name** field, enter a name for the document and click **Save**.

Save Assembled Text Document as PDF

With HotDocs Developer, you can use the PDF printer driver to save assembled text and form documents as PDF documents. Creating PDF files allows you to take advantage of features available in Adobe Acrobat.

To save a document as PDF

1. At the HotDocs library window, select a text template and click  **Assemble**. (See [Assemble a Text or Form Document](#).)
2. Answer questions in each dialog.
3. After answering all of the questions, choose **Save Document As** (**File** menu). The **Save As** dialog box appears.
4. Specify the file name and folder path for the file.
5. At the **Save as** drop-down list, make sure **PDF File (*.pdf)** is selected.


6. Optionally, click **Security** to assign any security options you need to the document. (See [Assign Security Options to a PDF Document](#).)
7. Click **Save**. The **Convert to PDF** dialog box appears.
8. Optionally, you can add information about the document's title, subject, author, or search keywords. Otherwise, click **OK**. The assembled document is saved in PDF format.

Information you type in the **Convert to PDF** dialog box is saved as metadata embedded in the PDF-based file. HotDocs does not use this information, but other programs that work with PDF files may access this metadata. (For instance, if you open a PDF or PDF-based form template in Adobe Acrobat, you can select **Document Properties** (**File** menu) to see the values in these fields.) For form templates, the values input here will also be set in any PDF documents assembled with that template.

Save Assembled Form Document as PDF

With HotDocs, you can use the PDF printer driver to save assembled PDF form documents as PDF documents. Creating PDF files allows you to take advantage of features available in Adobe Acrobat.

To save assembled PDF forms as PDF

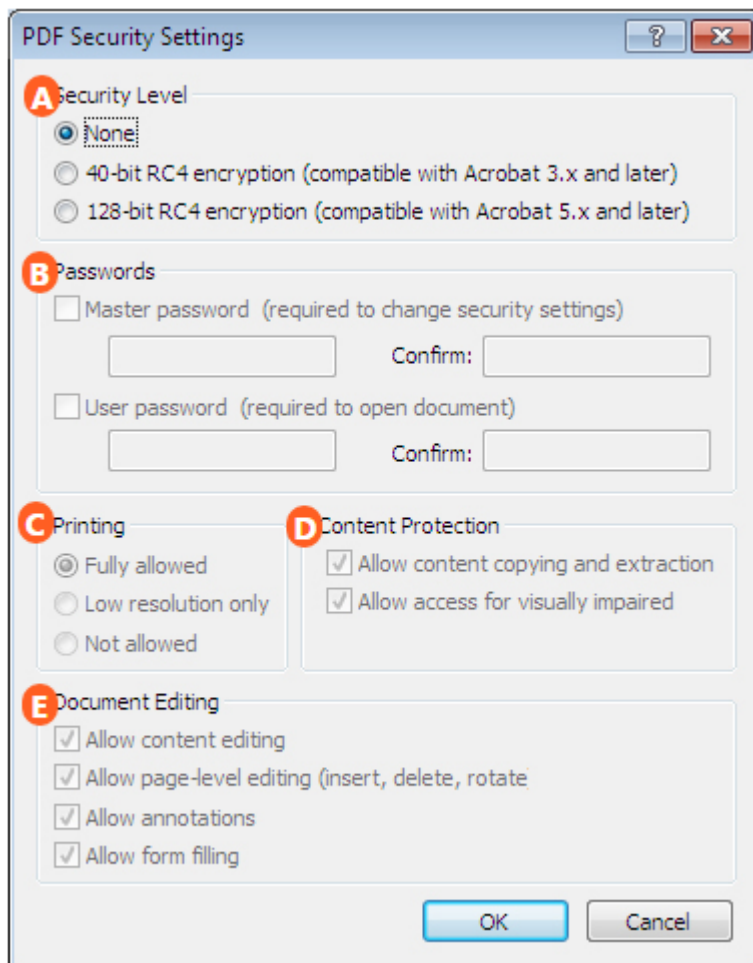
1. At the HotDocs library window, select a PDF template and click  **Assemble**. (See [Assemble a Text or Form Document](#).)
2. At the **End of Interview** dialog, click **Save the assembled document as a PDF**. The **Save As** dialog box appears.
3. Specify the file path and name for the PDF file, and select **PDF File (*.pdf)** from the **Save as type** drop-down list.
4. Optionally, click **Security** to assign any security options you need to the document. (See [Assign Security Options to a PDF Document](#).)
5. Click **Save**. The **Convert to PDF** dialog box appears.
6. Optionally, you can add information about the document's title, subject, author, or search keywords. Otherwise, click **OK**. The assembled document is saved in PDF format.

If the file you're using to create a PDF document is a form document, the answer fields and other HotDocs features are removed. Only the current answers are shown as static text on the PDF document. If you may need to edit the answers later, you should first save the file as a PDF-based form document (.HPD), then save another copy of the file as a PDF.

Information you type in the **Convert to PDF** dialog box is saved as metadata embedded in the PDF-based file. HotDocs does not use this information, but other programs that work with PDF files may access this metadata. (For instance, if you open a PDF or PDF-based form template in

Adobe Acrobat, you can select **Document Properties** (**File** menu) to see the values in these fields.) For form templates, the values input here will also be set in any PDF documents assembled with that template.

At a Glance: The PDF Security Settings Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

If you select **Save Document As...** from the **File** menu while assembling a template, then you can view the **PDF Security Settings** dialog box by choosing **PDF File(*.pdf)** from the **Save as Type** drop-down list and clicking the **Security** button.

In the first set of options **A** you can decide on the Security Level you would like from the following options:

- **None:** Assigns no security options to the PDF document you are creating.
- **40-bit RC4 Encryption:** Allows you to assign minimum security options to the document, including disabling the ability to print the document, changing the contents of the document, copying or extracting the contents of the document, and adding or changing comments in the document. While security is less, the document is compatible with versions of Acrobat back to version 3.
- **128-bit RC4 Encryption:** Allows you to assign more complicated security options to the document. This level of security, however, makes it so the document can't be viewed in any version earlier than Acrobat 5.

In the second set of options **B** you can set Master and User passwords for the file. You can set the Master password by ticking the check box and entering your chosen password in both the Password and Confirm fields below. The file then requires a password when editing the contents of the document. You can set the User password by ticking the check box and entering your chosen password in both the Password and Confirm fields below. The file then requires the intended recipient to enter a password when opening the document. Make sure you communicate this password to the intended recipient.

In the third set of options **C** you can set the printing options. **Fully allowed** lets the user to print a copy of the document, **Low resolution only** lets the user to print only a low-resolution copy of the document, and **Not allowed** keeps the user from printing a copy of the document

In the fourth set of options **D** you can set the content protection options. Check the first box to allow the intended recipient to copy content from the document and check the second box to allow visually impaired recipients greater access to the document.

In the final set of options **E** you can set the Document Editing options by ticking the check boxes:

- **Allow content editing:** Allows the intended recipient to edit the content of the document, including making changes to the text.
- **Allow page-level editing:** Allows you or the intended recipient to make page-level edits in the document.
- **Allow annotations:** Allows the intended recipient to annotate the document.
- **Allow form filling:** Allows the intended recipient to fill form questions in the document.

To learn more about setting options for PDF Security follow the link below:

- [Assign Security Options to a PDF Document](#)

Assign Security Options to a PDF Document

When creating PDF documents, you may want to protect the content of the document. You can do this by assigning security options to the document.

To assign security options at the HotDocs Save As dialog box

1. Assemble a document. (See [Assemble a Text or Form Document](#).)
2. Choose **Save Document As** (**HotDocs File** menu). The **Save As** dialog box appears.
3. Click the **Save as type** drop-down button and choose **PDF File (*.pdf)**.
4. Click the **Security** button. The **PDF Security Settings** dialog box appears.
5. Make your selection, based on the following information (for additional information about each of these options, see the Adobe Help file):
 - Select **None** to leave the document unprotected. No security options will be applied and the user can edit the document (using Adobe Acrobat Professional).
 - Select **40-bit RC4 encryption** to apply less-stringent security options to the document (and make the document compatible with all versions of Adobe starting Adobe 3.x). (Selecting this option affects which options are available in the rest of the dialog box.)
 - Select **128-bit RC4 encryption** to apply more stringent security options to the document (and restrict use of the document to Acrobat 5.x and later users). (Selecting this option affects which options are available in the rest of the dialog box.)
 - Select **Master password** and enter (and confirm) the required password to require the user to enter a password when changing security options for the document.
 - Select **User password** and enter (and confirm) the required password, require the user to enter a password when attempting to open the document.
 - Select one of the printing options: **Fully allowed**, **Low resolution only**, and **Not allowed to allow varying levels of printing**.
 - Clear **Allow content copying and extraction** to keep users from copying the text in the document and pasting it into other applications.
 - Select **Allow access for visually impaired** to allow the document to be read out loud by Acrobat.
 - Select **Allow content editing** to let users can modify the pages of the document, including adding or removing pages, or rotating pages to let users make changes to the document.
 - Select **Allow page-level editing (insert, delete, rotate)** to let users make changes to page properties of the document (such as inserting pages).
 - Select **Allow annotations** to let users make comments or other notes in the document.
 - Select **Allow form filling** to let users enter information in Adobe fields on the form.

Working with Assembled Form Documents

Introduction: Assemble a Form Document

In most cases, you assemble a form document exactly as you assemble a text document. (See [Assemble a Text or Form Document](#).) However, HotDocs form documents provide some additional capabilities. For example, you can enter answers directly in the form document, moving from field to field. You can also print a blank copy of the form that can be completed by hand. Finally, you can create and modify an addendum to save answers that require more space than the form provides.

At a Glance: HotDocs Filler

The screenshot shows the HotDocs Filler application window titled "HotDocs Filler - [Form1]". The window has a menu bar with "File", "Edit", "View", "Field", "Tools", "Window", and "Help". Below the menu bar is a toolbar with various icons for file operations, editing, and navigation. The main workspace displays a form titled "Hobble Creek Publishing GROUP TERM LIFE INSURANCE APPLICATION". The form includes a logo for Hobble Creek Publishing and instructions to "Please print all information in black ink." The form is divided into two sections: "Section 1: Employee Information" and "Section 2: Coverage Information".

Section 1: Employee Information

Name (Last, First, Middle Initial)		Gender
Street Address	City	State
Email Address		
Social Security Number		Marital Status
<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>		<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Separate



















Section 2: Coverage Information

At the bottom right of the window, there is a status bar with the text "NUM" and a small icon.

Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

When you open HotDocs Filler to view assembled form documents you will see the window laid out with one main **Workspace**, a **Toolbar** and above that a **Menu Bar**. Using HotDocs Filler you can edit the answers and the form, save and print the document.

From the **Toolbar** you can access the following buttons:

-  **HotDocs Library:** Opens the HotDocs library (if it's not already open) and brings it to the front.
-  **Open:** Opens a form template file for editing, or opens a saved form document for printing or editing.
-  **Save:** Saves the current form. If the form has never been saved, HotDocs will ask for the path and file name to use.
-  **Print:** Prints a copy of the form.
-  **Field Properties:** Displays the Field Properties dialog box during direct-fill assembly of form documents. This allows you to modify the appearance of answers in that field.
-  **Answer Font:** Changes the font for the selected field or fields.
-  **Fill Tool:** Allows you to place your cursor in a form's answer field and type an answer.
-  **Select Tool:** Either creates a new field or selects an existing field during direct-fill assembly of a form document.
-  **Scroll Tool:** Scrolls form documents up and down, and side to side during direct-fill assembly.
-  **Zoom Tool:** Changes the view of the form document during direct-fill assembly, increasing the magnification (or decreasing it when used in combination with the Shift or Ctrl keys).
-  **Fit Page Width:** Displays the entire width of the current form page in the window.
-  **Fit Page Height:** Displays the entire length of the current form page in the window.
-  **Show Fields:** Shows or hides the field backgrounds.
-  **Show Thumbnails:** Shows or hides a thumbnail view of each page in the form at the left of the window.
-  **Previous Page:** Moves to the page just before the current page in the form.
-  **Next Page:** Moves to the page just after the current page in the form.
-  **HotDocs Options:** Opens the HotDocs Options dialog box where you can specify several preferences that control how HotDocs works
-  **Help:** Opens the relevant page of the HotDocs Help File.

In the **Menu Bar** you can access further options not available on the **Toolbar**.

To learn more about editing assembled documents using HotDocs Filler follow the link below:

- [Edit a Saved Form Document](#)

Enter Answers Directly at the Form Document Tab







When assembling text documents, you answer questions in the interview and those answers are merged into the document. When assembling form documents, however, you can either enter your answers in the interview or you can enter your answers directly on the form document. This latter method of assembly is called direct-fill assembly. In some cases, the template provider designs templates so that the only method for assembly is by direct-fill.

To enter your answers directly into the fields

1. At the HotDocs library window, select a form template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. If you're not viewing it, click the **Form Document** tab. The assembly window changes to show the form document.
3. Click on a field and enter an answer.
4. Press **Tab** to move to the next field, or use the mouse to click on another field.

As you tab between fields, HotDocs will skip any conditioned fields that have been resolved in such a way that it isn't necessary to answer the field.

5. Optionally, you can perform any of the following tasks:

To	Do This
Create a new field on the document	Click the  Select Tool button and draw the field. (See Create a Form Field.) To enter text in the field click on the  Fill Tool and then click in the field.
Add additional answers to a table	If the template developer has included it, click the  Table Wizard button next to the field.
Answer questions that compute the answer for a field or control the inclusion of other answers	If the template developer has included it, click the  Answer Wizard button next to the field.
Show or hide the colored fields	Click the  Show Fields button.
Quickly browse through the pages of a form document	Click the  Show Thumbnails button. This displays small images of each page in the document in the left margin of the form view. You can click one of these images and go to that page immediately.

Jump to a specific page of the assembled document

Move through the answers in a document

Choose **Go To** (**Edit** menu) and enter the page number of the page you want to view.

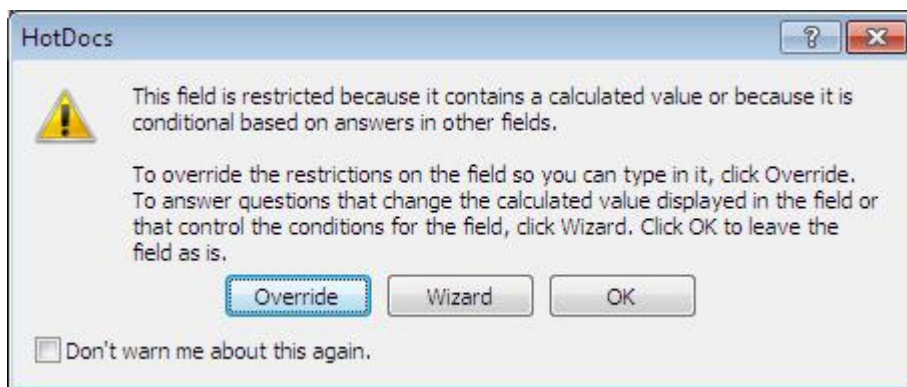
Place your cursor in a field and click one of the following navigation buttons: (If the Form Navigation Bar isn't showing, choose it at the **View** menu.)

- Clicking **▶Next** or **◀Previous** moves you to the next or previous answer in the document.
- Clicking the **▶Next Unanswered** or **◀Previous Unanswered** button moves you to the next unanswered question in the document
- Pressing **Ctrl+M** or **Shift+Ctrl+M** moves between matching answers in the document (for example, those answers in the document that are exact matches). (You can also press **Shift** as you click the **▶Next** or **◀Previous** button.)
- Clicking **▶End** or **◀Beginning** to go to the end of the document or the beginning of the document.

To access answer wizards, table wizards, and calendars during direct-fill assembly, right-click on the field and choose the option from the shortcut menu. For example, to view the calendar for a date field, right-click on the field and choose **Calendar** from the shortcut menu.

Some answers may be too large to fit in the field. If this happens, HotDocs warns you by displaying the **Overflow Status** dialog box. See [Check Form Fields for Answer Overflow](#). Similarly, you can specify when this warning should appear. See [Set Rules for Handling Answer Overflow](#).


At a Glance: The Field Inactive Warning Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

When entering answers at the form document tab, you will see the **Field Inactive Warning** dialog box when you try to enter an answer into a restricted field.

Here you have three options:

- **Override:** Choosing **Override** will allow you to type any answer into the field regardless of the restrictions placed upon it, however this answer will not be saved in the answer file and will not be used in any calculations. After clicking the **Override** button you will see another warning tab explaining this.
- **Wizard:** If the field has an answer wizard attached to it then choosing **Wizard** opens that answer wizard. From there you can answer the questions necessary to properly create the answer that the restricted field requires. You can also open answer wizards by clicking on the **Answer Wizard**  button next to the field.
- **OK:** Choosing **OK** will close the warning dialog without altering the answer in the answer field.


To learn more about entering answers at the form document tab follow the link below:


- [Enter Answers Directly at the Form Document Tab](#)

View the Assembled Form Document

Before saving the assembled form document, it is a good idea to review the document. You can do this at the **Form Document** tab of the assembly window. Doing this allows you to make changes to answers in the document and have those changes automatically updated in the answer file.

To view assembled form documents

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After answering the questions in the interview, click the **Form Document** tab. The assembly window changes to show the assembled document.
3. Optionally, select a field and enter a different answer. (See [Enter Answers Directly at the Form Document Tab](#).)
4. Once you have finished entering answers, complete any of the following options:
 - Click the  **Save Document** button to save the assembled form document to disk. (See [Save an Assembled Text or Form Document](#).)

- Click the  **Print Document** button to print the assembled form document. (See [Print an Assembled Form Document](#).)
- Click **Send Document To > Mail Recipient** (**File** menu) to attach the assembled form document to an e-mail message. (See [Attach a Text or Form Document to an E-mail Message](#).)
- Click **Close** (**File** menu) to close the assembly window. HotDocs prompts you to save any changed answers.

See [Introduction: Assemble a Form Document](#) for a list of changes you can make to an assembled form document.

Assemble a Fillable PDF Document


Some form templates you assemble can be saved as fillable PDF documents. Fillable PDF documents allow users to enter answers on the form while editing the form in Adobe Acrobat or Reader.

The process of assembling a fillable PDF is nearly the same as the process for assembling a regular form document—you can enter answers in the interview or type your answers directly on the form at the **Form Document** tab. You can also choose to save the assembled document as a HotDocs form document, a regular PDF, or a fillable PDF. If you plan to save the assembled document as a fillable PDF, however, there are a few things you should understand:

- Adobe Acrobat/Reader does not support the creation of an addendum when an answer overflows its field. If a field overflows in HotDocs, Adobe may attempt to force the answer to fit in the field when you save it as a fillable PDF. If the answer doesn't fit, it will simply appear cut off. If possible, you should review the assembled document for any field overflow before sending it to Adobe so that you can minimize the chance answers won't appear correctly in the field. See [Check Form Fields for Answer Overflow](#) for details.
- When viewing the document in HotDocs, some answers may appear differently than when viewing the assembled document in Adobe Acrobat/Reader. This is because the underlying Adobe fields may have formats or patterns assigned to them that are different than what was assigned in HotDocs.
- If you create additional fields on the assembled document, any text you enter in the fields will appear as static text when you save the document as a fillable PDF.
- If you change the properties of an existing fillable field, those changes will not be honored when you save the document as a fillable PDF.

To assemble a fillable PDF document

1. Follow the instructions for assembling a form document in [Assemble a Text or Form Document](#).
2. Complete the interview. (See [Navigate Through Answer-Gathering Dialogs](#).)

3. At the **Form Document** tab, review your answers.
4. Choose **Check for Overflow** (**Tools** menu) and resolve any fields that overflow.
5. Click the  **Save Document** button. The **Save As** dialog box appears.
6. Click the **Save as type** drop-down button and select **Fillable PDF Form** from the list of options.
7. Enter a name in the **File name** field and click **Save**. The document is saved.

Once you save the document, you should review it to make sure the answers appear correctly.

When creating a fillable PDF document, form designers can enable usage rights within the document. These rights allow Adobe Reader users to save copies of the document with changes they have made to the document—including entering or changing answers they have entered in the fillable PDF. However, when a rights-enabled fillable PDF is converted to template format, the document is changed in such a way that usage rights are no longer in effect. This means that you will not be able to save changes you make when editing the assembled document in Adobe Reader.


Override an Answer in a Form


In a HotDocs form document, fields are designed to hold certain types or formats of information. However, there may be times when you need to enter a type of answer that HotDocs won't allow. You can override the field type and enter any answer you need.

For example, a field with a Number variable attached to it is designed to hold only digits. However, if the number you enter (say, \$325,000,000) is too large for the field, but you don't want to send the answer to the addendum, you can override the field and enter \$325 m.

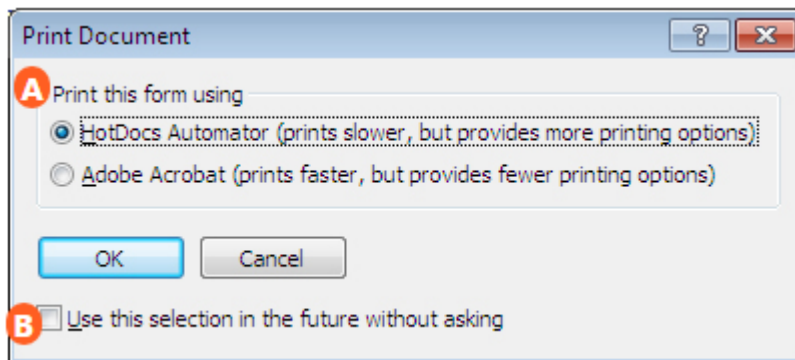
Answers entered in overridden fields are not saved in the answer file. The original answer is saved in the answer file and used in any computations or other fields that require it.

To override an answer


1. At the HotDocs library window, select a form template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After entering answers, click the **Form Document** tab. The assembly window changes to show the document.
3. Select the field you want to override.
4. Click the  **Override Field** button and, at the **Override Field** warning message, click **OK**. The assembly window appears again.
5. In the field, enter the answer you want, then move to a different field. The overridden field changes to gray.

To remove the overridden answer, select the field and click the  **Override Field** button again. The current answer is removed and the saved answer reappears. Removing the override, however, may create answer overflow situations. See [Check Form Fields for Answer Overflow](#) for details.

At a Glance: The Print PDF-Based Documents Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

When you are assembling a PDF-based template you can view the **Print PDF-based Documents** dialog box by clicking the  **Print** button at the **Form Document** tab or by selecting **Print Document...** from the **File** menu.

From the multiple choice list **A** at the top of the dialog you can select which application you want to use to print the document—HotDocs or Adobe Acrobat. The following provides some guidelines for choosing an option:

When using **HotDocs** to print the document:

- You cannot print a PDF-based form using a PostScript printer driver.
- You should print within the 300 DPI (dots per inch) to 600 DPI range, as printing at higher resolutions may be problematic.
- For the most reliable results, use a PCL-based printer with at least 8 MB RAM. Other types of printers may or may not print as expected.
- You can print the document with or without the answers merged. (You cannot do this using Adobe Acrobat.)
- Printing time takes longer than printing with Adobe Acrobat. (Printing at a lower resolution may decrease the amount of time it takes to print.)

When using **Adobe Acrobat** to print the document:

- You can print a PDF-based form using a PostScript printer driver. (PostScript printer drivers are always recommended. Non-PostScript printer drivers may print the page off-center by 1/8 inch to 1/4 inch.)
- Documents will print with both form fields and answers—you have no option of printing one or the other.
- Printing time is faster than with the HotDocs print function.
- Both printer options give you options for scaling the content to fit in the printable area.

At the bottom of the dialog there is a check box **B** that you can select to specify the printing option you select as the default selection. HotDocs will not prompt you for this information again.

To learn more about printing options for form documents follow the links below:


- [Print an Assembled Form Document](#)
- [Choose Default Form Printing Options for a Form](#)

Print an Assembled Form Document

Many projects require you to print copies of assembled form documents. The options available for printing a form depend on which type of form you are printing. Specifically, you can print:

- HotDocs form documents (or .HFDs).
- HotDocs PDF documents (or .HPDs).

To print a form document

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click the **Form Document** tab. The assembly window changes to show the assembled document.
3. Click the  **Print Document** button.
4. If you are printing a HotDocs form document (or .HFD file), select any of the following printing options. (If you're printing a PDF form document, skip to step #5.)
 - To print the form and answers, select **Form with Answers** in the **Output** group.
 - To print only the static text of the form, select **Form Only (Blank Form)** in the **Output** group.

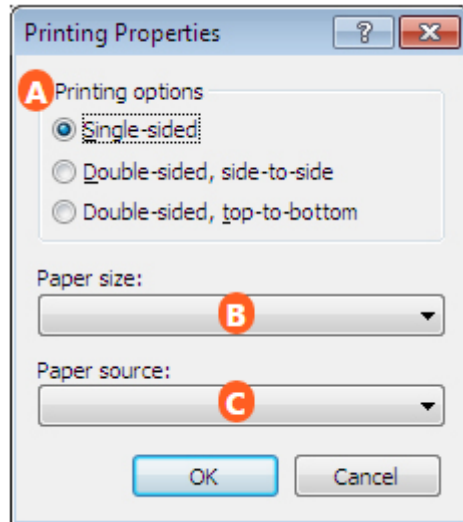
- To print the answers onto a pre-printed copy of the form, select **Answers Only (Use Preprinted Form)** in the **Output** group.
 - To change the double-sided printing options, select the desired option. **Single-sided** prints the document using one side of each sheet of paper. **Double-Sided, Side-to-Side** prints the document with the tops of both pages at the same end of the paper, like a traditional book. **Double-Sided, Top-to-Bottom**, prints the document with the bottom of the second page at the same end as the top of the first page, like a flip-chart.
5. If you are printing a PDF form document (or .HPD file), you must choose whether to print using the functionality of HotDocs or Adobe Acrobat. (See [Print PDF-Based Documents Dialog Box](#) for tips on which printing option you should choose.)
- Choose **HotDocs**, which prints at a slower speed but provides a wider range of printing options.
 - Choose **Adobe Acrobat**, which prints at a faster speed but provides few printing options.

Some types of printers have been known to cause problems when printing a form template or document, and should be tested before use with finished products. These printers include:

- Ink jet printers
- Brother printers
- 16-bit postscript printer drivers
- DeskJet printers
- Xerox printers
- "All-in-one" printers (printers that include copying, scanning, printing, and faxing capabilities)

For best results, it is recommended that you use an HP LaserJet with at least two megabytes of memory.

At a Glance: The Printing Properties Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

While editing a form template, you can open the **Printing Properties** dialog box choosing **Printing** from the **Template Properties** list in the **File** menu.

From the multiple choice list **A** at the top of the dialog you can select the from three printing options:

- **Single-sided:** Prints all pages on separate sheets of paper.
- **Double-sided, side-to-side:** Prints the template using both sides of the paper, so you can turn through the pages like a traditional book.
- **Double-sided, top-to-bottom:** Prints the template using both sides of the paper, so you can lift the pages up, like a flip-chart.

Below this list are two drop-down menus. From the first drop-down list **B** you can select the paper size you would like to use and from the second drop-down list **C** you can select the paper source.

To learn more about setting the printing options for a form template follow the link below:

- [Choose Default Form Printing Options for a Form](#)

Choose Default Form Printing Options for a Form

Different forms may require different printing settings. You can specify that a form should be printed single-sided, double-sided side-to-side, or double-sided top-to-bottom. You can also control what size of paper to use as well as which paper tray should feed the paper to the printer.

The option you specify is set as the default in the **Print** dialog box, but users can select a different option.

To specify form printing options

1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Click **File > Document Properties > Printing**. The **Printing Properties** dialog box appears.
3. Select the printing settings from the following options:
 - **Single-sided** prints the document using one side of each sheet of paper (default setting).
 - **Double-sided, side-to-side** prints the document double-sided, with the tops of both pages at the same end of the paper. (This option allows you to turn through the pages like a traditional book.)
 - **Double-sided, top-to-bottom** prints the document double-sided with the bottom of the second page at the same end as the top of the first page. (This option allows you to turn through the pages like a flip chart.)
 - **Paper size** specifies the dimensions of the paper used to print the document.
 - **Paper source** specifies what tray of paper is used to print the document.

Paper size and source settings are recommendations that will be passed on to the printer if possible. If printing via acrobat then paper size, paper source and duplex options will revert to your defaults.

You can specify the print setting for all forms you create at the **HotDocs Options** dialog box. (See [Introduction: HotDocs Options](#).)

You can use command-line options to control the paper size and paper source. (See [Paper Size and Paper Tray](#).)





Edit a Saved Form Document

After assembling a form document, you often need to save the document to disk. Once saved, you can re-open the document using HotDocs Filler.

Once a form document is saved to disk, it is no longer associated with the answer file. This means that changes you make to answers in the document do not affect the answer file. If you want to save changes you're making to the answers, re-assemble the form document and change your answers in the interview. Then save your answer file again.

To work with a saved form document in Filler

1. Using Windows Explorer, locate and double-click the appropriate form document. HotDocs Filler appears, showing the form document.
2. Optionally, you can perform any of the following tasks:

To	Do This
Change an answer in a field	<p>Click on a field. The field becomes active, allowing you to enter an answer.</p> <p>You can edit answers in a saved form document, but you must re-evaluate any computations or conditions affected by changed answers. Similarly, changes you make are not reflected in the answer file used to assemble the document.</p>
Create new fields	<p>With the  Select Tool button selected, press the left mouse button and move the mouse pointer to draw a rectangle. To type in this field, select the  Fill Tool button.</p> <p>The fields you create in Filler have no variable associated with them. They are simply text fields where you can type information.</p>
Print the document	Click the  Print button.
Open a different HotDocs form file	Click the  Open button, and then locate the desired file. (You can also press Ctrl+O .)

3. Once you have the assembled form document open for editing, there are several other things you can do. For example, you can:
 - Change the field type. (See Change the Field Type.)
 - Change the size of a field. (See Resize Form Fields.)
 - Change the position or margins of a field. (See Move a Field on a Form and Change the Borders and Margins of a Field.)
 - Create a new answer field. (See Create a Form Field.)
 - Rotate text in a field. (See Rotate Answers in a Field.)
 - Convert answers on the form to bar code format. (See Convert Answers on the Form to Bar Code Format.)
 - Insert a graphic into a field. (See Insert a Graphic File in a Form.)
 - Cross out static text on the form. (See Cross Out Static Text on the Form.)
 - Circle static text on a form. (See Circle Static Text on a Form.)

Create a Form Field


You can create a form field on an assembled form document.

When you create a field, HotDocs determines the type of field you are creating based on the size of the field—if a field is smaller than a certain dimension, HotDocs creates a check-box field. If a field is larger, then it creates an edit field. (You can define these dimensions at HotDocs Options. See [Set Properties for New Edit Fields](#).)

Sometimes when you create a field, HotDocs can detect the borders of the underlying form and adjust its size to fit within those borders. This helps ensure the field fits best in the space allotted. See [Detect Borders to Create or Resize a Field](#).

Once a field is created, you can enter any text you need in it.

To create a form field

1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Click the  **Select Tool** button.
3. Position the mouse pointer at one end of the intended field.
4. Press and hold down the left mouse button, then drag the pointer to the opposite corner of the field.
5. Release the mouse pointer. The field is created.
6. Optionally, click **Detect** to have HotDocs adjust the size of the field to more closely match the underlying static line or lines.
7. Optionally, you can customize the appearance of your fields in the following ways:
 - Change the field type. (See [Change the Field Type](#).)
 - Adjust the size. (See [Resize Form Fields](#).)
 - Change the field's position on the form. (See [Move a Field on a Form](#).)


To move multiple fields once they have been created, select the fields and press the arrow key that indicates which direction you want to move them. To move fields more quickly, press the **Shift** key while pressing the arrow keys.

You can also create a standard-size field by double-clicking on the form. Or, you can click to set the field cross-hair and press **F8**.

Select a Field

In order to work with a field, you must first select it. When you select a field, handles appear on the field borders showing that you can edit the borders or other properties. You can select a single field to work with, or you can select multiple fields to group them or to make the same change to all of the fields.

To select fields


1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Click the  **Select Tool** button
3. Click on the field you want to work with.
4. Optionally, to select multiple fields, either press the **Ctrl** key while clicking each field, or press the **Shift** key, then press the mouse button and drag the mouse pointer to create a bounding frame. All fields included in or touched by this frame will be selected.
5. Use any of the following additional methods for selecting fields or canceling the selection, as described in the following table:

To	Do This
Select all the fields on the current page	Click Select All (Edit menu). (You can also press Ctrl+A .)
Cancel the selection of all selected fields	Click outside the fields, or press the Esc key.
Cancel the selection of only one of a group of selected fields	Hold down the Ctrl key and click that field.
Add fields to your group of selected fields without canceling the selection of those already selected	Hold down the Ctrl key and click the new fields.



If you have trouble selecting the field you want, the field may be in a group. If this is the case, you must first ungroup the fields by clicking **Ungroup** (**Field** menu). (See [Ungroup Form Fields](#).)

Click the  **Show Fields** button to show and hide field colors.



Detect Borders to Create or Resize a Field

When you create fields on a form, you often use the underlying static text as a guide as to where the field should be placed. Often, you want the borders of the fields to match the borders of the static text. To help you align these borders, you can use the  **Detect** feature. This feature is useful both when you create a new field and when you need to resize a field to fit within its allotted space.

If HotDocs is unable to automatically create or resize a field to the size and position you want, you must create the field manually. Several factors may contribute to these difficulties:

- **Insufficient surrounding features:** To detect a field, HotDocs searches for surrounding features, such as lines, text, or graphics. If there are insufficient surrounding features, HotDocs may have difficulty detecting a field. In such cases, HotDocs creates a field of the default size.
- **Label text:** When label text is inside the field area and there is enough space between the text and the bottom of the field area, the  **Detect** command will extend the field up to the bottom of the label text. If you want the field to occupy the area to the left or right of the label, or if you want to include the label inside the field, you must create the field manually.
- **Field not completely visible:** If part of the intended field is not visible (for example, it's scrolled out of the window), HotDocs attempts to scroll to detect the field. It is recommended that you use a zoom level such as  **Fit Page to Width** so HotDocs can find the entire field on the screen.

To detect the borders of the underlying static text

1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. On the form, complete one of the following steps:
 - If the field is already created, select the field and click the  **Detect** button.
 - If you are creating a new field, place your cursor where the new field should be created and click the  **Detect** button.

Move a Field on a Form

As you create fields on a form, you will frequently need to move the fields. You can do this using the mouse or keyboard. You can also specify a precise location using the **Field Properties** dialog box.


To move a field using the mouse

1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Position the mouse pointer over the selected field. The cursor changes.
3. Hold down the mouse button and drag the field to the new position.

To move a field using the keyboard

1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Select a field. (See [Select a Field](#).)
3. Press the arrow keys to move the field one unit of measurement in that direction. (To move the field more quickly, hold down the **Shift** key as you press the arrow keys.)

To move a field using the Position/Size dialog box

1. Edit a form template. (See [Edit a Saved Form Document.](#))
2. Select a field. (See [Select a Field.](#))
3. Click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. Click the **Additional** tab. The view changes to show the positioning options.
5. In the **Position** group, enter the desired distance from the left and top margins of the page in the **Left** and **Top** boxes. (You can also click the up or down arrows for each field to change the distance.)


If a field you want to move is part of a group, you must first ungroup the fields. (See [Ungroup Form Fields.](#))

The **Field Properties** dialog box includes the **First**, **Previous**, **Next**, and **Last** buttons to move you between fields. When you have multiple fields selected, these buttons are not available.

Change the Borders and Margins of a Field

You can change the borders and margins of a form template field. Borders control the thickness of the field box, and margins control the distance between the border of the field and the answer text.

To change field borders or margins

1. Edit a form template. (See [Edit a Saved Form Document.](#))
2. Select the field whose borders or margins you want to change.
3. Click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. Click the **Layout** tab. The view changes to show layout options.
5. In the **Borders** and **Margins** groupings, make your selections. (Remember, borders affect the thickness of field boxes, while margins affect the distance between the border of the field and the answer in the field.)

Copy One or More Form Fields

Frequently, you need to copy fields on a form. For example, say you need to create a group of fields that all have the same properties. Rather than creating each field individually and modifying its properties, you can create a single field, assign the properties, and then copy the field to create the others in the group.

When a field is copied to a new place in the same template, all the field's properties (size, font, line formatting, fill order, etc.) are copied with it.

When you copy fields to a new location, the cursor position tells HotDocs where to paste the copied fields. If you copy a single field, the lower-left corner of the field will be at the cursor position. If there is no cursor, the field is pasted on top of the original.

You can copy fields on only one page at a time.

To copy and paste one or more fields

1. Edit a form template. (See [Edit a Saved Form Document.](#))
2. Select the field or fields you want to copy. (See [Select a Field.](#))
3. Choose **Copy** (**Edit** menu). The field is copied to the Windows Clipboard. (You can also select the field and press **Ctrl+C**, or you can right-click on the field and choose **Copy** from the shortcut menu.)
4. Place the mouse cursor where you want the lower-left corner of the copied field to be, and then click the mouse to set the cross-hair.
5. Choose **Paste** (**Edit** menu). The copied field is pasted at that location. (You can also press **Ctrl+V**, or you can right-click on the field and choose **Paste** from the shortcut menu.)

Resize Form Fields

You may need to adjust the size of a field to fit it into the available space on the form. You can change a field's size using the mouse, the keyboard, or the **Position/Size** tab of the **Field Properties** dialog box.

To resize a field using a mouse


1. Edit a form template. (See [Edit a Saved Form Document.](#))
2. Select the field. (See [Select a Field.](#))
3. Click a handle or field border. (When the mouse pointer is on a handle, the pointer changes to a double-arrow, indicating the directions the border can be moved.)
4. Hold down the mouse button and drag the border to a new position.

To resize a field using the keyboard

1. Edit a form template. (See [Edit a Saved Form Document.](#))

2. Select the field. (See [Select a Field.](#))
3. Press the **Page Up** or **Page Down** keys to move the top border of the field up or down, and the **End** or **Home** keys to move the right border of the field right or left. (To resize the field more quickly, hold down the **Shift** key as you press the keys.)

To resize a field using the Field Properties dialog box

1. Edit a form template. (See [Edit a Saved Form Document.](#))
2. Select the field. (See [Select a Field.](#))
3. Click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. Click the **Additional** tab and, in the **Size** group, enter the desired distance from the left and top borders of the field in the **Width** or **Height** boxes. (You can also click the up or down arrows for each field to change the size.) The field size is changed.

Change the Tab Order of Fields

When determining the order to ask questions in the interview, HotDocs begins with the top-left field of the form and processes all of the fields until it reaches the bottom-right field. This processing affects two things—the order questions are asked in the default interview and the order in which the user is able to tab through fields on the form.

Because of this default field ordering, sometimes you may find the tab order of fields to be incorrect. You can change this order.


Once you specify a fill order for one field, you must specify the order for every field you want processed after that field. In effect, when you specify a fill order for just one field, you set that field to be answered last. This is because all the other fields are still set to *Row 0, Column 0*—they are lower than the *Row 1* or *Column 1*, so they will be filled first. Therefore, to change the order of the fields in the middle of the form, you must also change the order for every remaining field.

The following rules control field ordering:

- Fill order is determined first by row, then by column.
- All field values are initially set the same—Row 0, Column 0.
- When fields have different row numbers, fields with lower row numbers are asked first, for example, Row 0, Column 0; Row 1, Column 0; etc.
- When fields have the same row numbers, but different column numbers, fields with lower column numbers are asked first, for example, Row 1, Column 0; Row 1, Column 1; etc.

- Fill order is treated separately for each page of the template—you cannot specify a fill order that runs from one page to another.

To change the tab order for fields

1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Select the field. (See [Select a Field](#).)
3. Click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. Click the **Additional** tab. The view changes to show ordering options.
5. In the **Row** box, type the row number.
6. If you need to specify the order for fields in the same row, type a number in the **Column** box.
7. Optionally, at the **Order** dialog box, you can click the **First**, **Previous**, **Next**, or **Last** button to save the current field's settings and display the next field's order.

By selecting and ordering different groups of fields, you can use fill order to handle various situations. For example:

- **Remove all fill order settings:** Select all fields and set the **Row** and **Column** numbers to **0**.
- **Organize large sections of fields:** Select the desired fields and specify the order.
- **Flow answers across fields contrary to the default order (top to bottom, left to right):** Set the desired order, then group the fields. (See [Group Form Fields So Answers Can Flow From One Field to Another](#).)
- **Fill table columns in an order different from the static text:** Set the desired order, then group the fields as a table.

Group Form Fields So Answers Can Flow From One Field to Another

Sometimes an answer must begin in one field and continue in other fields. For example, you may have a Text variable whose answer must span two or more pre-printed lines. You can create fields for each line, and then group the fields so that answers flow from one field to another. Fields grouped this way are called run-on groups.

Once fields are grouped, HotDocs treats the group as a single field.

To flow an answer across multiple fields

1. Edit a form template or [saved form document](#).
2. [Create all the text fields](#) across which the answer should flow.

3. [Select all the fields](#) that will be used for the answer.
4. Click **Group** in the **Field** menu. A bounding frame appears around the grouped fields. (You can also right-click and select **Group** from the shortcut menu.)

When fields are grouped, you cannot change properties for individual fields. You must first [ungroup the fields](#).

Ungroup Form Fields

When fields are grouped, you cannot modify the individual fields. You must first ungroup the fields.

To ungroup the fields

1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Select one of the grouped fields. The whole group is selected. (See [Select a Field](#).)
3. Click **Ungroup** (**Field** menu). (You can also right-click on the field and choose **Ungroup** from the shortcut menu.)

Some properties that were assigned to the group, such as text, margin, and line format properties remain applied to the individual fields that made up the group. Other properties, such as a field order or a condition, are lost until you regroup the fields. Regrouping the fields restores the properties that were previously applied to the group.

Change the Font Used for a Field

You can choose the font that is used for answers on a form. When choosing the font, you can also indicate the style (for example, bold or italics), size, effects, and color that are used.

As is always the case when working with fonts, if the form requires a specific font be used, you must ensure the font is installed on all computers where the form will be viewed.

To change the font for a field or group of fields


1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Select the field or fields whose font you want to change.
3. Click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. At the **Type** tab, click **Font**. The **Font** dialog box appears.
5. Make your font selections.

You can specify default font properties for all new fields you create at **HotDocs Options**. See [Set Properties for New Edit Fields](#) for more details.

Format Lines and Paragraphs of Text in a Form Field

Sometimes you need to format the text within a multi-line text field. For example, perhaps you need to indent the first line of a paragraph, or maybe you need to adjust the number of lines that fit in an inch of vertical space. To do this, you can adjust the line format of a field.

To format lines and paragraphs


1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Create a multi-line field.
3. With the field selected, click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. Click the **Layout** tab. The view changes to show the different options for formatting the field.
5. In the **Line Format** group, complete one of the following options:

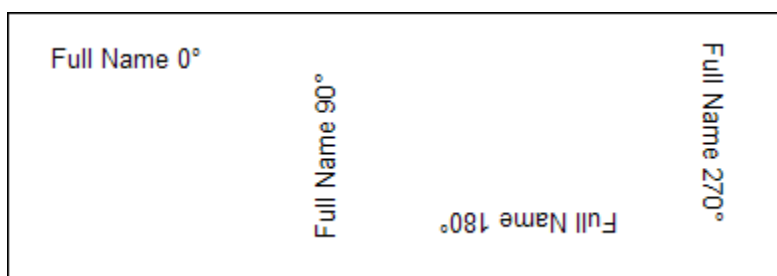
To	Do This
Indent the first line of text in the paragraph	Enter how much space to include between the margin of the field and the first character of the answer in the First line indent box. (You can either type the number or click the up or down arrows.)
Force a certain number of lines to appear in an inch of space in the field	Enter the number of lines in the Lines per inch box.
Indicate how many lines can appear in the field	Enter the number of lines in the Maximum lines box. If the answer contains more lines than is specified, the field will overflow.
Indicate the maximum number of characters that can appear in a given line of text	Enter the number of characters in the Max chars/line box. When the number of characters exceeds this limit, text will wrap to the next line.

Rotate Answers in a Field

By default, answers in fields appear in horizontal rows and can be read from left to right. You can rotate text so answers will read from bottom to top, top to bottom, or upside-down from right to left.

To rotate text in a field

1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Select the fields you want to rotate. (See [Select a Field](#).)
3. Click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. Click the **Layout** tab. The view changes to show field layout properties.
5. In the **Rotation** group, select a degree of rotation: **0°**, **90°**, **180°**, or **270°**, for example:



When you change the rotation, HotDocs views the bottom of the letters as the bottom of the field. This means that aligning the text horizontally or vertically may have different effects.


Keep Contents of Form Fields from Printing

Form Document

ometimes you want field text to appear on the form during direct-fill assembly, but you don't want the text to appear when you print a copy of the form. You can select an option that keeps this text from printing.

To designate that a field's contents shouldn't be printed

1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Create or select the field whose text you want to appear only on the form.


3. Click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. At the **Type** tab, select **Non-printing field**.

Cross Out Static Text on the Form

Sometimes a form includes static text that must be crossed out, depending on answers the user enters during the interview. For example, say a form includes a list of medical conditions. Instructions on the form tell you to cross out any conditions that do not apply to you. You could manually cross out these conditions once you've printed the form; however, HotDocs allows you to create a strike-through field, which crosses out the text for you, depending on answers you enter during the interview.

A strike-through field, which is transparent, overlays the static text. You can choose the character that will be used to cross out the text.

To create a strike-through field in a form


1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Create a field that covers the static text on the form. (See [Create a Form Field](#).)
3. Click the  **Field Properties** button. The **Field Properties** dialog box appears. (You can also right-click and select **Field Properties** from the shortcut menu.)
4. Click the **Type** tab.
5. In the **Field** type group, select the type of field you want to associate with the strike-through field.
6. In the **Display type** group, select **Strike-through**.
7. In the **Strike-through character** box, enter the character you want to be used for crossing out the text.
8. Optionally, click **Font** to change the font properties (perhaps to make the font size larger or smaller).
9. Close the **Field Properties** dialog box. The text on the form is crossed out.

Circle Static Text on a Form

Sometimes instructions on a form ask users to circle a preprinted option. Rather than make users print the form and manually circle the option using a pen, you can create a form field that overlays a circle on the text. You can attach a variable to the field so that the user can select which option should be circled

during the interview. Creating circle fields not only preserves the professional look of the form, but allows the answer associated with the selection to be saved in the answer file.


To create a field that circles text

1. Edit a form template. (See [Edit a Saved Form Document.](#))
2. Create a field that covers the static option on the form you want to select. (See [Create a Form Field.](#))
3. Click the  **Field Properties** button. The **Field Properties** dialog box appears. (You can also right-click and select **Field Properties** from the shortcut menu.)
4. Click the **Type** tab.
5. In the **Field type** group, select the type of field you want to associate with the circled field.
6. In the **Display type** group, select **Circled**.
7. Optionally, to control the width of the circle's border, click the **Layout** tab and change the **Line thickness** in the **Circle** group.

Insert a Graphic File in a Form

Sometimes you may need to include an image on your form, such as a signature or seal. You can create a field and assign as one of its properties a graphic file. Supported file formats include .JPG, .BMP, and .PNG. Image files should be saved to the same folder as the template.

To create a graphic field without using a variable

1. Edit a form template. (See [Edit a Saved Form Document.](#))
2. Create a field. (See [Create a Form Field.](#))
3. With the field still selected, click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. At the **Type** tab, select **Image** from the **Display type** group.
5. Click the  **Open** button next to the **Image file name** box. The **Open** dialog box appears.
6. Locate and select the desired graphic file and click **Open**. The path and file name appear in the box.

The image is visible at the **Form Document** tab.

Convert Answers on the Form to Bar Code Format

You can create a two-dimensional bar code field that displays a single answer or group of answers. This may be useful if the organization to which you submit your documents requires certain data in the document be in bar code format. This allows the organization to scan the information and save it in some data retrieval system, such as a database.



For example, say you must submit a form to the court. When the court files the form, rather than manually entering case information (such as party names, case numbers, etc.), it can simply scan the bar code and have the information automatically entered in the system.

Typically, bar codes display data in a pattern of lines and formats, which should be readable by most hand-held laser scanners or charge-coupled device (CCD) scanners. The scanner should be able to read the size of the bars, which is 0.01 inch.

Use the following tips when working with bar codes:

- The format HotDocs uses for bar codes is PDF417, or Portable Data File 417. It is one of several recognized 2-D bar code formats.
- Bar codes in HotDocs can store about 1,500 characters, including numbers and other standard text symbols.
- Printing a form that has a bar code requires a high-density printer, such as a laser printer.
- Bar code fields can overflow, but all overflow properties assigned to the field are ignored. When too much text is entered for a bar code, no bar code appears. If you are having trouble getting the bar code to fit in the field, you can enlarge the field or reduce the field margins. (See [Resize Form Fields](#) or [Change the Borders and Margins of a Field.](#))

To create a bar code using predefined text

1. Edit a form template. (See [Edit a Saved Form Document.](#))
2. Create a field. (See [Create a Form Field.](#))
3. Click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. At the **Type** tab, select **Bar code**.
5. Type the data you want encoded in the **Bar code text** box. As you type the text, HotDocs displays the bar code in the underlying form field. (You may need to click the  **Show Variables** button in the Automator toolbar to hide variable names.) (If you are entering a group of answers that must be interpreted by the bar code scanner as individual answers, you must separate each answer with some sort of delimiting character, such as a tilde (~) or vertical bar (|).)

For example, Superior Court of Ada County|12 N. Elm Street|Boise|99999.


For information on changing the bar code specifications, see [Understand Bar Code Settings.](#)

To access the **Field Properties** dialog box, you can also right-click and select **Field Properties** from the shortcut menu.

Flow a Single Answer Across Two or More Pages in a Form

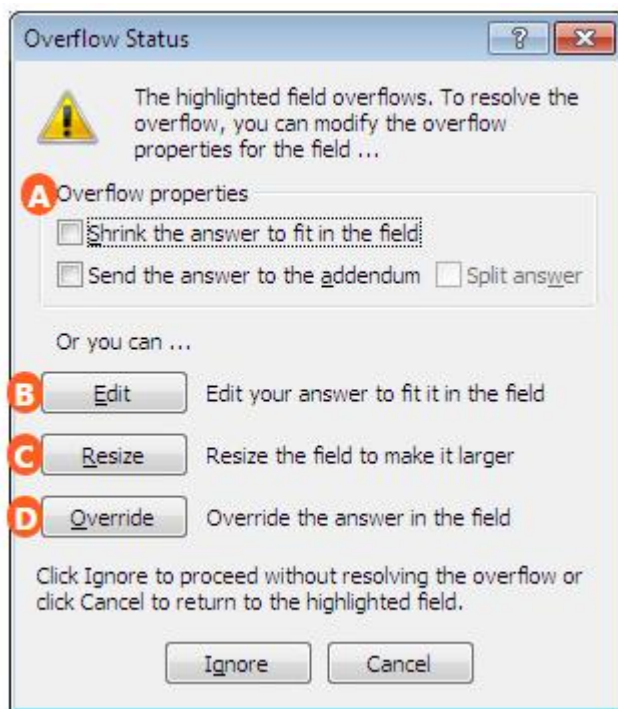
At times, a single answer field will start at the bottom of one page and continue to the top of the next page. However, HotDocs will not allow you to create a single field that spans across both pages. You can, however, create two fields—one on each page—and then link them using the **Group Fields** command.

To group fields on separate pages

1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Create the first field in the series of spanned fields. (See [Create a Form Field](#).)
3. Select the field and click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. Click the **Overflow** tab, and in the **Group name** box, enter a name. Usually, this is the name of the variable, but it can be any text as long as it is the same for each field in the group.
5. On the following page(s), create the fields that will contain any overflow. Do not assign variables to these fields.
6. Repeat the preceding steps for each field in the group, using the same group name as you assigned to the first field.

Now, answers that do not fit in the first field will overflow to the next field named in the group.

At a Glance: The Overflow Status Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

When entering answers at the form document tab, you will see the **Overflow Status** dialog box when you enter an answer that is too large for the field.

At the top of the dialog there are two check boxes **A** you can select to decide the overflow properties. You can select **Shrink the answer to fit in the field** to reduce the answer's font size to the minimum font size specified in the **Field Properties** dialog box for this field or you can select **Send the answer to the addendum** to send the answer information to an addendum at the end of the document, and inserts an addendum reference in the field. The **Split answer** option only becomes available after selecting **Send the answer to the addendum** and send only the portion of the answer that does not fit in the field to the addendum.

Otherwise you can choose from the three option buttons below. Click the **Edit** button **B** to place the cursor in the highlighted field so you can shorten the answer, click the **Resize** button **C** to select the field so you can click a field border or handle and resize the field (resizing the field to make it larger may resolve the overflow), or click the **Override** button **D** to override the field properties, and place the cursor in the highlighted field so you can edit the answer. When override is used, you can enter any type of answer.

To learn more about when the overflow status dialog box appears follow the links below:

- [Check Form Fields for Answer Overflow](#)
- [Enter Answers Directly at the Form Document Tab](#)

- [Control Warnings During Assembly](#)

Check Form Fields for Answer Overflow

HotDocs can compare the size of a field and the length of the answer. If an answer uses more space than is available in that field, HotDocs warns you and lets you resolve the overflow. Your options for resolving the overflow include reducing the answer's font size, sending answers to the addendum, editing the answer, resizing the field in which the answer is merged, and overriding the field to enter a differently formatted answer.

After you complete an interview, you can manually check for answer overflow. Also, when you direct-fill assemble a form document, HotDocs automatically checks each field when you move to another field. Finally, when you print a document, HotDocs checks for any unresolved answer overflows.

To manually check for field overflow

1. At the HotDocs library window, select a form template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After answering the questions in each dialog, click the **Form Document** tab to view the assembled document.
3. Click **Check for Overflow** (**Tools** menu). HotDocs begins comparing the size of each field and answer.
4. If an answer is too long, HotDocs selects the field and displays the **Overflow Status** dialog box. Information about the status of any answers that overflow is displayed at the top of the dialog box.
5. Make adjustments as explained in the following table:

To	Do This
Reduce the answer's font size to the minimum size allowed for the field	Select Shrink the answer to fit in the field . The answer's font size is reduced to a smaller point size. If the answer still doesn't fit in the answer field, you must choose another option for resolving the overflow.
Send the answer to the addendum and insert cross-reference text in the answer field	<p>Select Send the answer to the addendum. The answer is moved to the addendum. HotDocs then merges text in the field that indicates the answer can be found in the addendum.</p> <p>Select Split answer if you want only the part of the answer that doesn't fit in the field to be sent to the addendum.</p>

Change the text of the answer, such as reduce the number of words in the answer

Click **Edit**. HotDocs highlights the field that contains the answer so you can edit the text.

Once you edit your answer, click back on the **Overflow Status** dialog box to have HotDocs the overflow.

Make the answer field larger

Click **Resize**. HotDocs selects the field so you can click one of its handles to resize it.

Once you resize the answer field, click back on the **Overflow Status** dialog box to have HotDocs recheck the overflow.

Override any settings or formats of the field and enter any text in the field

Click **Override** and enter the text you choose in the field.

Overriding a field does not change the original answer. In fact, HotDocs continues to use the original answer in any calculations or scripts that require it. It also saves the original answer to the answer file. Choosing to override a field simply allows you to define only the text that needs to appear on the form.

Once you override the answer field, click back on the **Overflow Status** dialog box to have HotDocs recheck the overflow.

Resolve the overflow at a later time

Click **Ignore**. The **Overflow Status** dialog box is closed and you are able to work with other answer fields in the document. If you click on the overflowing answer field again, or if you check for answer overflow, you will be asked to resolve the overflow again

Resolve the overflow on your own

Choose **Close**. HotDocs highlights the overflowing field so you can change the answer in whatever way you choose

Once you resolve the overflow, you can click **Close** to close the dialog box. Any other fields that overflow will display a similar dialog box.

You can prevent HotDocs from checking for field overflow during assembly. See [Set Rules for Handling Answer Overflow](#) for details.

Fillable PDFs do not support the creation of an addendum when a field overflows. This means that if a field in an assembled fillable PDF template overflows, the answer in the saved PDF document will simply appear cut off. Template users should always review and modify any answers that may potentially overflow before saving the assembled document as a fillable PDF.

Customize the Look of the Addendum

Sometimes when assembling a form document, an answer is too long for the form field. One way to resolve this overflow is to send the overflowing text to an addendum, which is a section of the form designed to display such answers. You can modify the appearance of the addendum—for example, you can choose what page margins to use, define what text appears in the headers and footers, and choose the font properties for the text that is used in the addendum. You can also define how pages are numbered in the addendum.

To change the addendum format

1. Edit a form template. (See [Edit a Saved Form Document](#).)
2. Click **File > Document Properties > Addendum**. The **Addendum Properties** dialog box appears.
3. Complete any of the following steps:

To	Do This
Define how much white space there is between the addendum page edges and the text in the addendum	Enter the dimensions in the Page margins group.
Define the text that appears at the top of each addendum page	Enter the text in the Header text box. To learn how to merge page numbers in the header, see Use Answer Overflow and Addendum Text Codes .
Define the text that appears at the bottom of each addendum page	Enter the text in the Footer text box. To learn how to merge page numbers in the footer, see Use Answer Overflow and Addendum Text Codes .
Change the font properties (including font face, size, and style) of the header or footer text	In the respective Header properties and Footer properties groups, click the Font button and make the changes at the Font dialog box.
Define how much vertical space the header or footer text requires	In the respective Header properties and Footer properties groups, enter a number in the Height box.
Change the alignment of the header or footer	In the respective Header properties and Footer

text

Define the font properties (including font face, size, and style) for answers that appear in the addendum

Define how much space there should be between the addendum label and the answer

Define how much space there should be between each answer in the addendum

Make the addendum appear as a pleading paper

properties groups, click the **Alignment** button and choose your alignment option.

In the **Addendum entries** group, click the **Font** button and make your changes at the **Font** dialog box.

In the **Addendum entries** group, enter a number in the **Indentation** box.

In the **Addendum entries** group, enter a number in the **Space between** box.

Select **Number lines to format as pleading paper**.

Once an answer has been sent to the addendum, you cannot edit the actual addendum—you must either modify your answers at the **Form Document** tab or **Interview** tab, or you must send the addendum to the word processor (choose **File > Send Addendum To > Word Processor**). You can also send the addendum to the Windows Clipboard (choose **File > Send Addendum To > Clipboard**) to paste it into a different program for editing.

Fillable PDFs do not support the creation of an addendum when a field overflows. This means that if a field in an assembled fillable PDF template overflows, the answer in the saved PDF document will simply appear cut off. Template users should always review and modify any answers that may potentially overflow before saving the assembled document as a fillable PDF.

Define Overflow Properties for a Regular Field


When an answer is too large to fit in its field, HotDocs, by default, warns you and asks how to handle the overflow. You can customize the field overflow properties, controlling how HotDocs automatically handles answer overflows.

For example, you can have HotDocs automatically create an addendum, where each answer that overflows is sent. In the field that overflows, HotDocs can insert cross-reference text that points you to a specific item in the addendum. You can designate the text that is used both for the cross-reference and for the label in the addendum.

Another option is for you to have HotDocs automatically reduce the answer's font size. You can set a minimum point size and control if the answer is automatically reduced to this size before displaying an overflow warning message. (Be careful reducing the font size since others may find the smaller size harder to read.) (See [Change the Font Used for a Field](#).)

How you define overflow properties depends on the type of field you are creating. For example, in an addendum, grouped fields and tables are handled a little differently from regular fields.

To set overflow properties for regular fields

1. Edit a form template. (See [Edit a Form Template](#).)
2. Select the field whose overflow properties you want to define.
3. Click the  **Field Properties** button and click the **Overflow** tab.
4. Complete any of the following steps:


To	Do This
Automatically shrink an answer that overflows to a specific point size	Select Shrink answer as needed and enter a point size in the points box.
Automatically send an answer that overflows to the addendum	Select Send answer to addendum . (To send only part of a multi-line answer to the addendum, select Split answer . (See Split a Multi-Line Answer Between the Form and the Addendum .)
Define the text that appears in the answer field when an answer is sent to the addendum	Enter the text in the Cross-reference text box. (See here for a list of reference numbering codes you can use.)
Define the text that identifies the answer once it has been sent to the addendum	Enter the text in the Addendum label text box.
Make an answer the first item on its addendum page	Select Begin addendum entry on a new page .
Make an answer the last item on its addendum page	Select Begin new page following addendum entry .

Fillable PDFs do not support the creation of an addendum when a field overflows. This means that if a field in an assembled fillable PDF template overflows, the answer in the saved PDF document will simply appear cut off. Template users should always review and modify any answers that may potentially overflow before saving the assembled document as a fillable PDF.

Split a Multi-Line Answer Between the Form and the Addendum

When creating multi-line fields, you can select an overflow option that sends either all of the answer to the addendum, or only the part of the answer that doesn't fit in the field to the addendum.

To choose overflow options for a multi-line answer

1. Create a multi-line field. (See [Create a Form Field](#).)
2. Select the field and click the  **Field Properties** button. The **Field Properties** dialog box appears.
3. Click the **Overflow** tab. The view changes to show overflow options.
4. Complete any of the following steps:

To	Do This
Always send the answer to the addendum without prompting the user	<p>Select Send answer to addendum.</p> <p>To send just the part of the answer that doesn't fit in the field to the addendum, select Split answer.</p>
Specify the text that will be merged in the field as well as the addendum if the user chooses just to send to addendum	<p>Enter the text in the Cross-reference text and Addendum label text boxes, respectively.</p> <p>To specify alternate text that will be merged in the field and addendum if the user chooses to split the answer between the form and the addendum, type a vertical bar () and then enter the alternate text after the bar. For example:</p> <p>Cross-reference text: See Addendum 1 Continued in Addendum 1</p> <p>Addendum label text: Addendum 1 (con't) Addendum 1</p>

Fillable PDFs do not support the creation of an addendum when a field overflows. This means that if a field in an assembled fillable PDF template overflows, the answer in the saved PDF document will simply appear cut off. Template users should always review and modify any answers that may potentially overflow before saving the assembled document as a fillable PDF.

Attach a Text or Form Document to an E-mail Message

After assembling a document, you can attach it to an e-mail message and send it to another user.

Internet-based e-mail services are not compatible with this feature. You must have an e-mail program, such as Microsoft Outlook, installed on your computer.

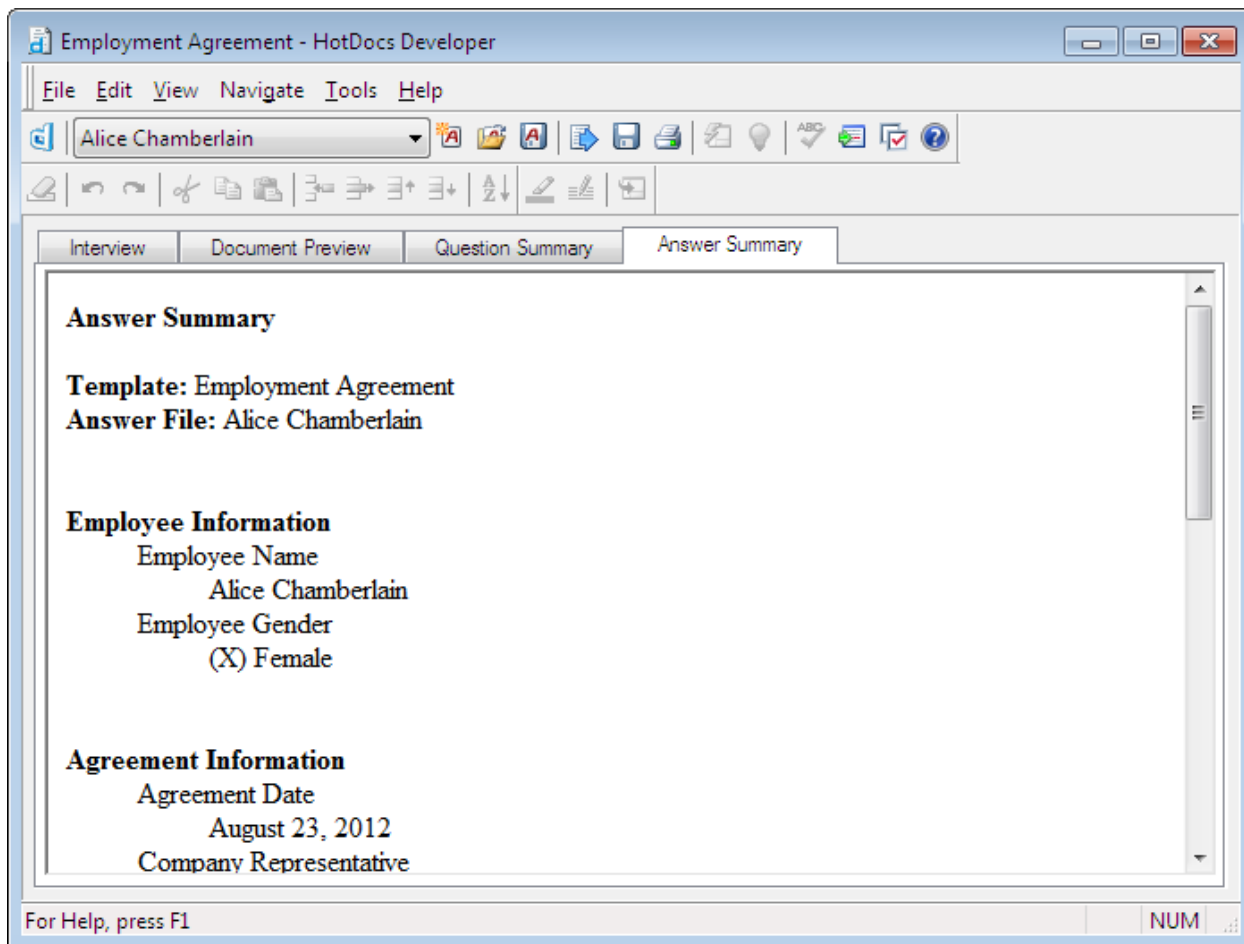
To attach a document to an e-mail message

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click **Send Document To > Mail Recipient** (**File** menu). The **Send Document To Mail Recipient** dialog box appears.
3. Type a name for the attachment, then click **OK**. An e-mail message window appears.
4. Complete the e-mail message and send it.

Creating Template and Document Summaries**Introduction: Question and Answer Summaries**

Some projects may require a printout of the information in the template. A Question Summary lists each question followed by a blank space so an answer can be written in, as if being filled out like a questionnaire. An Answer Summary lists each question and the associated answer. These printouts can be concise records of exactly what information was used when the document was assembled.

The following is an example of an Answer Summary:



You can specify a one-column or two-column format for your summaries. In one-column format, dialogs, questions, and answers are displayed as an indented outline. In two-column format, the information is presented as a table, with each answer appearing on the same row as its question. (See [Change the Way Question and Answer Summaries Appear](#).)

If you're assembling a form document, you can create a questionnaire by printing a blank copy of the form itself.




View a Question Summary

You can create a concise list of the questions that appear in an interview. This can be useful when you want to create a questionnaire, gathering information from one person so that a second person can enter the information using HotDocs. A question summary can also give a quick overview of what questions will be asked during an interview.

You can format a question summary to appear as an indented bullet list, or as a table with one column for questions and a second column for answers. (See [Change the Way Question and Answer Summaries Appear.](#)) Also, in a question summary, you can control which conditional sections are included. (See [Control Which Variables are Asked in a Question Summary.](#))

To assemble a question summary

1. Assemble a text or form document. (See [Assemble a Text or Form Document.](#))
2. At the assembly window, click the **Question Summary** tab. The assembly window shows the HotDocs variables and other information about the template. (To hide or show the tab, choose **Question Summary Tab** at the **View** menu.)
3. Optionally, complete any of the following tasks:

To	Do This
Print a copy of the summary	Click the  Print button.
Attaches the summary (in HTML format) to an e-mail message to send to another person	Choose Send Summary to Mail Recipient (File menu).
Send the summary to the word processor so you can edit it or format it	Click the  Send Summary to Word Processor button.
Save a copy of the summary as an HTML document	Click the  Save Summary button.

View an Answer Summary




An answer summary is a list of the questions and the answers in an assembled document. It provides a way to quickly scan and review information, rather than reading through a document or paging through dialogs in the assembly window.

You can format an answer summary to appear as an indented bullet list, or as a table with one column for questions and a second column for answers. (See [Change the Way Question and Answer Summaries Appear.](#))

To view an answer summary

1. At the HotDocs library window, select a template and begin assembling a document. (See [Assemble a Text or Form Document.](#))
2. After answering the questions, click the **Answer Summary** tab. The assembly window shows the HotDocs variables and the answers you have entered in the interview.

3. Optionally, perform any of the following tasks:

To	Do This
Print a copy of the summary	Click the  Print button.
Attaches the summary (in HTML format) to an e-mail message to send to another person	Choose Send Summary to Mail Recipient (File menu).
Send the summary to the word processor so you can edit it or format it	Click the  Send Summary to Word Processor button.
Save a copy of the summary as an HTML document	Click the  Save Summary button.

Saving Answer Files

Introduction: Save Answers

When you assemble a document, you can save the answers you enter in an answer file, which can then be used later to recreate the same document or assemble other documents that require the same information.

For example, perhaps you are creating several estate planning documents that require much of the same information, like names, addresses, and important dates. You can save your answers in an answer file and then use that answer file when assembling other estate planning documents. This eliminates the need to re-enter information you've already provided. Answer files are saved in XML format.



You can organize your answer files with the Answer File Manager, or you can use Windows Explorer to manage your answer files. (See [Manage Answer Files](#).)


See [Compatibility of HotDocs 11 Files with Earlier Versions of HotDocs](#) for details on making answer files compatible with versions of HotDocs prior to HotDocs 2009 and HotDocs 10.

Create a New Answer File

Often, you want to save answers you enter during an interview so they can be used with other interviews. Saving answers in an answer file and then reusing those answers keeps you from having to enter the same information multiple times.

To create a new answer file by assembling a document

1. At the HotDocs library window, select a template and begin assembling a document with a new, untitled answer file. (See [Assemble a Text or Form Document](#).)
2. Answer the questions in the interview and click the  **Save Answers** button. The **Save Answer File** dialog box appears.
3. In the **File name** field, enter a file name. (To save the answer file in a folder other than the default *Answers* folder, click the  **Browse** button and select a location.)
4. In the **Title** field, enter a name for the new answer file. This name will identify the answer file in Answer File Manager.
5. Optionally, type a note in the **Description** field to help identify the answer file. (The description will appear at the **Properties** tab of Answer File Manager. When searching for specific answer files, you can search based on text in the description.)
6. If the answer file will be used with HotDocs 2005-2008, select **HotDocs 2005-2008 answer file**. (See Compatibility of HotDocs 11 Files with Earlier Versions of HotDocs.)

To save an existing answer file as a new answer file, choose **Save As (File menu)** and enter a new name for the answer file. To create a new, empty answer file while in Answer File Manager, click the  **New Answer File** button and enter the appropriate information about the file you want to create.



By default, answer files are saved in the answer file folder specified during installation (for example *C:\Documents and Settings\Username\My Documents\HotDocs\Answers*). To change this default location, see [Change HotDocs Program File Locations](#).

Create a Default Answer File

When certain answers are used frequently in a specific document, you can have those answers automatically inserted each time you assemble the document. To do this, create a default answer file for that document.

A default answer file must be saved to the same folder as the template's component file. It must also have the exact same file name as the component file, but the file name extension must be either .ANX or .ANS. In most cases, the file name and path for the component file are identical to the file name and path for the template file. (The exception would be if the template is pointing to a shared component file, in which case you would use the shared component file name.) You can find this information by selecting the template at the HotDocs library window and viewing the **Properties** tab.

To create a default answer file for a document




1. At the HotDocs library window, select a template and begin assembling the document, using a new answer file. (See [Assemble a Text or Form Document](#).)
2. Type information for only the answers you want to be default answers.
3. Click the  **Save Answers** button. The **Save Answer File** dialog box appears.
4. At the **File name** field, click the  **Browse** button and locate the folder that contains the component file. Then enter a name that matches the component file's name, followed by an answer file name extension. For example, if the component file is named *Invoice.cmp*, the answer file name would be *Invoice.anx*.
5. In the **Title** field, type a name for the default answer file.
6. Optionally, in the **Description** field, type a description for the answer file.
7. If the answer file will be used with HotDocs 2005-2008, select **HotDocs 2005-2008 answer file**. (See Compatibility of HotDocs 11 Files with Earlier Versions of HotDocs.)


The next time you assemble the document, HotDocs automatically inserts the answers from the default answer file into the template's answer fields. You can then modify the answers as necessary and save a new answer file. (See [Create a New Answer File](#).)

Suggest an Answer File for Every Assembly

You may use a certain answer file more frequently than any others. You can select an option that will automatically suggest that answer file every time you assemble a document.

To suggest an answer file for every assembly


1. At the HotDocs library window, select a template and click  **Assemble**. The **Answer File** dialog box appears.
2. Click the  **Open Answer File** button. The **Open Answer File** dialog box appears.
3. Choose an answer file and click  **Select**. The **Answer File** dialog box appears again.
4. Select **Automatically select this answer file for use with the next assembly**, then click **OK**.


The next time you assemble any document, the same answer file will automatically be selected at the **Answer File** dialog box. To change the answer file, click the  **Open Answer File** button and choose a different file.

Save an Answer File During Assembly


While assembling a document, you can save the answers you have entered. This allows you to save your work and perhaps start a different assembly without closing the assembly window. Saving answers also allows you to use the information you enter with other templates, thus saving you time.

To save answers during assembly

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. At the assembly window, click the  **Save Answers** button. If you are using an existing answer file, the new answers are saved. If you are using a new answer file, the **Save Answer File** dialog box appears where you can perform any of the following tasks:

To	Do This
Enter the file name	At the File name field, enter a name. When you click OK , the answer file will be saved to the default <i>Answers</i> folder and a reference to it will be added to Answer File Manager. To save the answers to a location other than the default <i>Answers</i> folder, click the  Browse button and navigate to the location.
Enter the title that identifies the answer file in Answer File Manager	At the Title field, enter a name or accept the suggestion HotDocs makes.
Add information to help identify the file	At the Description field, type notes about the answer file's purpose or contents. (The description will appear at the Properties tab of the Answer File Manager. When searching for specific answer files, you can search for text in the description.)
Save the answer file so it is compatible with versions of HotDocs earlier than HotDocs 2009	Select HotDocs 2005-2008 answer file . (See Compatibility of HotDocs 11 Files with Earlier Versions of HotDocs.)



See [Introduction: Use Answer Management](#) for information on using Windows Explorer instead of Answer File Manager.


The  **Save Answers** button may be disabled because the template provider wants to prevent the answer file from being altered. You can assemble a document using new answers, but when you close the assembly window, the new answers are automatically discarded.

Switch Answer Files During Assembly

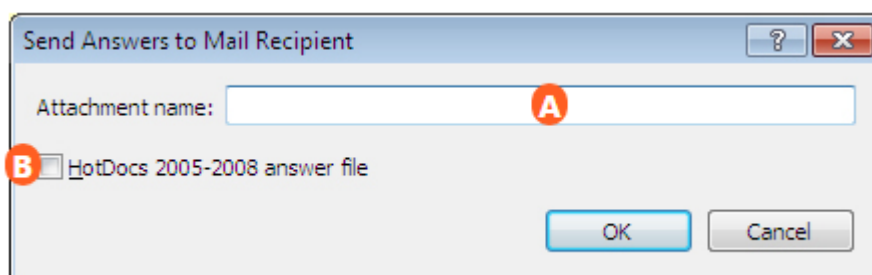
While assembling a document, you may want to use another answer file. At any point during the interview, you can select a different answer file, then continue the interview using the new answers.

To switch answer files

1. At the HotDocs library window, select a template and begin assembling a document. (See [Assemble a Text or Form Document](#).)
2. During the interview, click  **Open Answers**. The **Open Answer File** dialog box appears. (Depending on the file management settings you have selected, a Windows Explorer dialog box or a window from your document management program may appear instead. See [Manage Answer Files](#).)
3. Select an answer file and click  **Open**.
4. If prompted to save the old answers, click **Save**, **Save As**, or **Don't Save**, depending on your needs. (See [Save an Answer File During Assembly](#).)
5. The assembly window appears again, using the newly selected answer file.

When viewing the answer library, you can sort the answer files. To do this, select a folder and click  **Sort**. To search for a specific answer file, select the **Find** check box, then type the text for which you are searching in the text field.

At a Glance: The Send Answers to Mail Recipient Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

While assembling a template you can view the **Send Answers to Mail Recipient** dialog box by choosing **Send Answer to..** and then **Mail Recipient** from the **File** menu.

In the **Attachment name** field **A** you can specify the answer file name used for the e-mail attachment. You can also check the box **B** to send an answer file that would be compatible with HotDocs 2005-2008.

To learn more about sending answer files by email follow the link below:

- [Attach an Answer File to an E-mail Message](#)

Attach an Answer File to an E-mail Message

After gathering information in an interview, you may need to send those answers to another user. You can do this by attaching the answer file to an e-mail message.

Internet-based e-mail services are not compatible with this feature. You must have an e-mail program, such as Microsoft Outlook, installed on your computer.

To attach an answer file to an e-mail message

1. At the HotDocs library window, select a template and begin assembly. (See [Assemble a Text or Form Document](#).)
2. After completing the interview, click **Send Answers To** (File menu). The **Send Answers to Mail Recipient** dialog box appears.
3. In the **Attachment name** field, enter a name for the answer file attachment. Make sure to leave the file name extension on the attachment name.
4. Optionally, if you want the answer file to be compatible with versions of HotDocs prior to HotDocs 2009, select **HotDocs 2005-2008 answer file**.
5. Click **OK**. HotDocs opens an e-mail message and attaches the answer file.

Using Answer File Manager

Introduction: Use Answer Management

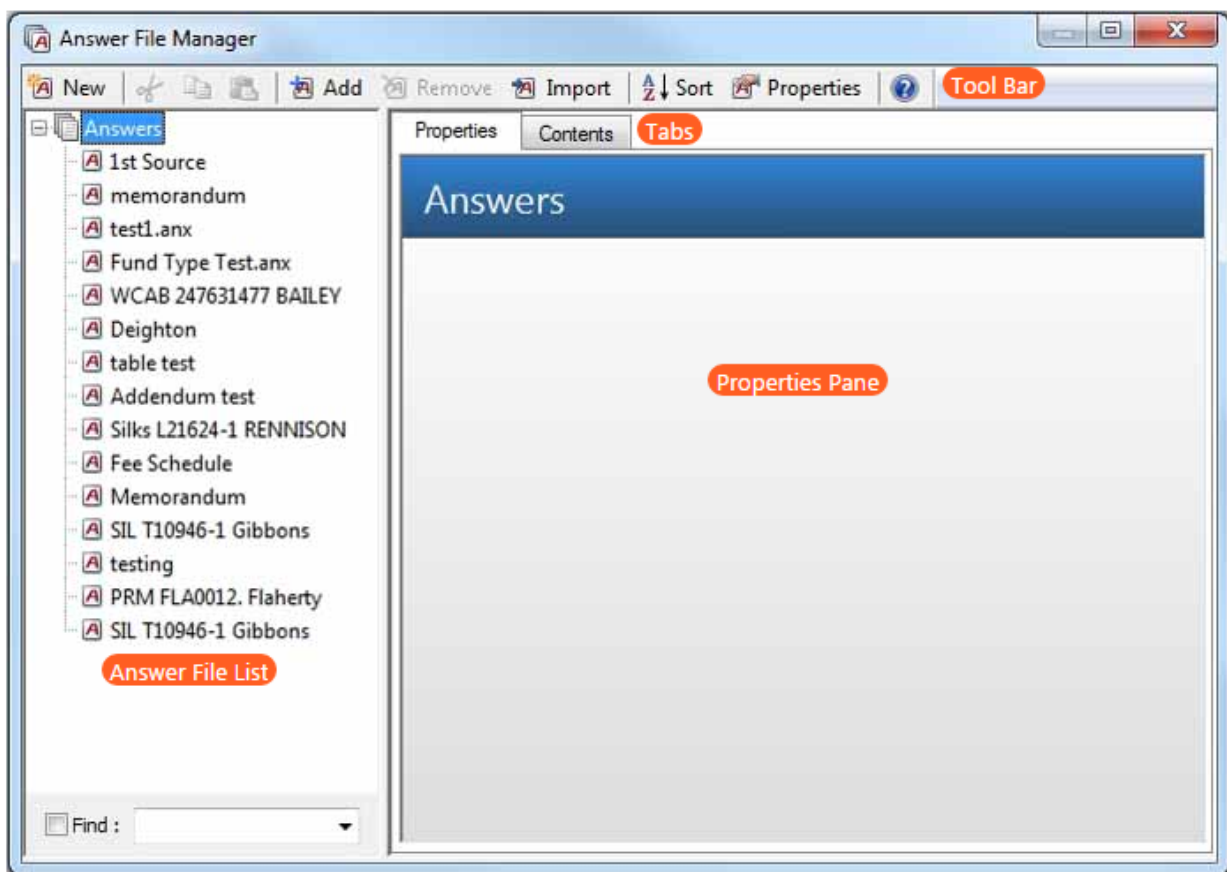
By default, each answer file you create or use is managed through the Answer File Manager. The Answer File Manager is similar to the HotDocs template library in that it allows you to organize your answer files

according to project specifications. It also lets you sort and search for answer files. (See [Introduction: Use HotDocs Libraries.](#))


At times you may prefer to not use the Answer File Manager. For example, you can manage answer files using a document manager instead of Answer File Manager. Or, if you have multiple users accessing the same set of answer files, you can use Windows Explorer, since only one person can have write access to Answer File Manager. (All other users have read-only access, which keeps them from saving or adding answer files to the answer library.)

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). By default, HotDocs will continue to use binary answer libraries as long as the file properties of items in the library use characters that are compatible with your system's default language. If you define answer file properties that contain foreign characters, HotDocs will create an XML-based answer library (so that it can properly display these characters in the **Properties** tab of the library window.)

At a Glance: The Answer File Manager













Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After clicking the  **Answer File Manager** button on the toolbar (or **Tools** menu) in your HotDocs Library the **Answer File Manager** window opens.

The window is split into two main panes. On the left is the **Answer File List**, this contains a list of all the answer files you have saved. You can select an answer file from this list by clicking on it.

The second main pane in the **Answer File Manager** window is the **Properties Pane**. When you select an answer file from the list the answer file properties are displayed in the **Properties Pane**. These include the **File name**, **File type**, **File path** and the usage **History**. To view the contents of the answer file go to **Tabs** at the top of the **Properties Pane** and click on the **Contents** tab. This will display a list of all variables, answers and variable types within the answer file.

To access further options for your selected answer file you can use the **Toolbar** at the top of the window. It contains the following options:

-  **New Answer File:** Displays the New Answer File dialog box where you can specify the type of answer file you want to create as well as provide a file name, title, and description for the file.
-  **Cut:** Removes (or cuts) the selected answer file to the Windows Clipboard so you can paste it someplace else in the library.
-  **Copy:** Copies the selected answer file to the Windows Clipboard so you can paste it someplace else in the library.
-  **Paste:** Pastes any items currently saved on the Windows Clipboard to the location you specify in the library.
-  **Add:** Displays the Add Item dialog box where you can add existing answer files or folders to your answer library.
-  **Remove:** Removes the selected answer file or folder. When you delete an answer file, you can choose whether to delete just the reference to the file in the library as well as to delete the actual file from disk.
-  **Import:** Allows you to locate an answer file and automatically copy it to the default Answers folder. If managing your answer files using Answer File Manager, the file will also be added to the manager.
-  **Sort:** Sorts the items in the currently selected folder in the order you have specified.
-  **Answer File Properties:** Displays the Item Properties dialog box where you can modify information about the item.
-  **Help:** Opens the relevant page of the HotDocs Help File.

To find out more about using **Answer File Manager** follow the links below:

- [Introduction: Use Answer Management](#)
- [Open and Close Answer File Manager](#)

- [Add an Answer File to Answer File Manager](#)
- [Work with Answer File Manager](#)
- [Add, Modify, and Delete Folders in Answer File Manager](#)

Open and Close Answer File Manager

When you use Answer File Manager to manage your answer files, you have greater control over the organization of your files (see [Work with Answer File Manager](#)). To use Answer File Manager, however, you must first open it.

To open Answer File Manager

- At the HotDocs library, click the  **Answer File Manager** button. **Answer File Manager** appears.


To close Answer File Manager

- At Answer File Manager, click the **X** in the upper-right corner of the dialog box.



You can also open Answer File Manager by choosing **Answer File Manager** at the **Tools** menu. To close Answer File Manager using the keyboard, press **Alt+F4**.

Add an Answer File to Answer File Manager

Answer File Manager allows you to organize your answer files. When you save your answers after an interview, a reference to the file is automatically added to Answer File Manager. When you need to use answer files that someone else has created (or if you have created them while using Windows Explorer to manage your files), you must add the files to Answer File Manager.




There are two ways to add an answer file to an answer library. You can import the answer file or you can add it using the  **Add** button.

To import an answer file


1. At the HotDocs library window, click the  **Answer File Manager** button. **Answer File Manager** appears.
2. Click  **Import**. The **Import Answer File** dialog box appears.

3. Browse to and select the file you want to import. HotDocs confirms you want to import the file.
4. Click **Yes**. The answer file is added to **Answer File Manager**. The file is also automatically included in any answer file drop-down lists.

To add an answer file to Answer File Manager using Add

1. At the HotDocs library window, click the  **Answer File Manager** button. **Answer File Manager** appears.
2. Click the  **Add** button. The **Add Item** dialog box appears.
3. In the **File name** field, enter the path and file name of the answer file you want to use (or click  **Browse** to locate and open the file).
4. In the **Title** field, enter a name for the answer file. This title will identify the answer file in Answer File Manager.
5. Optionally, in the **Description** field, enter a description to help you identify the answer file. (This description appears at the **Properties** tab, and can be used when searching for specific answer files.)

By default, answer libraries are saved in binary format, which does not support the use of international characters. If you attempt to add an answer file that contains international characters in its properties to Answer File Manager, HotDocs will prompt you to choose whether to create a new, XML-based answer library (which will support these characters) or convert the foreign characters to an approximate character that can be read in binary format. If you choose to create a new XML-based library, HotDocs 2005-2008 will continue to use the older binary-format library, while HotDocs versions after 2009 will use the XML-based library.

If the answer file is located in a folder other than the default *Answers* folder, you can import the file, which copies the file to the default *Answers* folder and adds it to Answer File Manager. To do this, click  **Import** and then locate the answer file.

When adding files to the library, press **Ctrl** or **Shift** to select multiple files at once.

Work with Answer File Manager






Answer File Manager helps you organize answer files, much like a HotDocs library helps you organize templates and clause libraries.

When you save answer files, they are added to Answer File Manager, where you can organize them and modify the file properties. You can also view an answer file's history—a list of dates and times the answer file was used, including the template with which it was used. Finally, the Answer File Manager lets you preview the answers currently saved in an answer file.

By default, answer libraries are saved in binary format, which does not support the use of international characters. If you are using a binary answer library and you either add an answer file that contains foreign characters in its properties to the library, or you change the properties of an existing file to include foreign characters, HotDocs will prompt you to either convert the answer library to XML format or manually remove the characters from the file's properties. If you choose to convert the answer library to XML format, you will have two answer libraries—one that works with HotDocs 2008 and earlier and one that works with HotDocs 2009 and later. (A third option allows you to keep the library in its current, non-XML format, but HotDocs replaces characters that are not compatible with your system's default language with the closest approximation available. Usually this means HotDocs will use question marks or square box characters.)

To display Answer File Manager

1. At the template library, click the **Answer File Manager** button. The **Answer File Manager** dialog box appears.
2. Complete any of the tasks described in the following table:

To	Do This
Create a new, empty answer file	Click the  New button. (See Create a New Answer File .)
Add an existing answer file to the library	Click the  Add button. (See Add an Answer File to Answer File Manager .) To add multiple files one at a time, press Ctrl or Shift to select several files.
Remove a reference to an answer file and optionally delete the actual file from disk	Select the answer file, then click  Remove .
Simultaneously copy an answer file you receive to the <i>Answers</i> folder and add it to the answer library	Click  Import . The Import Answer File Name dialog box appears, where you can browse to the answer file and select it. When you click OK , the file is copied to the <i>Answers</i> folder and added to the library.
Sort answer files in alphanumeric order, based on answer file titles	Select a folder, then click the  Sort button. The contents of the folder are reorganized.
Search for a specific answer file	Select Find , then type the text from the answer file's title or description for which you are searching in the text field. Only files that have matching text in their title or description are shown.

View the answers currently saved in an answer file


Select the answer file, then click the **Contents** tab.

In the **Contents** tab, you can sort the columns by clicking the column headings.

View the history of when the selected answer file was used to assemble various templates


Select the answer file, then click the **Properties** tab.

Change the title, path, file name, description, or format of an answer file

Select the answer file, then click the  **Properties** button and make the necessary changes.

Changing the file path does not change the location of the actual answer file. If you change the file path without moving the actual file to the new location on disk, that answer file will not be accessible.


Add a folder so that you can better organize groups of answer files

Click the  **Add** button, then select **Folder** at the **Type** drop-down field. (See [Add, Modify, and Delete Folders in Answer File Manager](#).)

Modify a folder's title or description

Select the folder, then click  **Properties**. (See [Add, Modify, and Delete Folders in Answer File Manager](#).)


Delete a folder

Select the folder, then click  **Remove**. HotDocs asks what you want to do with any answer files within the folder. (See [Add, Modify, and Delete Folders in Answer File Manager](#).)

Move an answer file into a folder

Double-click the folder to open it, then select the answer file and drag it to the folder.

Change the format of an answer file so it is compatible with a specific version of HotDocs

Select the answer file, and then click  **Properties**. The **Item Properties** dialog box appears where you can select **HotDocs 2005-2008 answer file**. (See [Compatibility of HotDocs 11 Files with Earlier Versions of HotDocs](#) for details.)



Use Windows Explorer to access answer files instead of Answer File Manager




Change the setting at the HotDocs Options dialog box. (See [Manage Answer Files](#).)

Add, Modify, and Delete Folders in Answer File Manager

To help organize your answer files, you can place them in folders and subfolders within Answer File Manager.

To add a new folder

1. At the HotDocs library window, click the  **Answer File Manager** button. The **Answer File Manager** appears.
2. Click the  **Add** button. The **Add Item** dialog box appears.
3. In the **Type** drop-down list, select **Folder**. The dialog box changes to show the options needed for new folders.
4. In the **Title** field, enter a folder name.
5. Optionally, in the **Description** field, enter notes to explain why the folder was created, or what kinds of answer files it contains. (This description appears at the **Properties** tab, and can be used when searching for specific answer files.)
6. Click **OK**. The folder is added to the answer library. You can work with the folder using the following commands:

To	Do This
Move an answer file to a specific folder	Double-click the folder to open it, then select an answer file and drag it to the folder.
Modify the title or description	Select the folder and click the  Properties button. The Item Properties dialog box appears, where you can change the title or description.
Sort the contents of a folder in alphanumeric order	Select the folder and click  Sort . The answer files are rearranged based on title.
Remove a folder	Select a folder and click  Remove . If you want to remove the items in the folder as well, select Remove the unselected items contained in the selected folders . Otherwise, any files referenced in the folder will be moved to the next folder level.

Using Published and Web-Based Files**Introduction: Use Published Files on the Internet**

When you install HotDocs, the installation program sets up HotDocs as a helper program for Microsoft Internet Explorer. This makes it possible for the browser to communicate with HotDocs. When you click on a hyperlink to an auto-install or auto-assemble file, the browser starts HotDocs and sends it the file. Then HotDocs begins installing or assembling the file.

In HotDocs, you can also add auto-assemble files from the Internet or from a corporate intranet to your HotDocs library. This allows you to access the files without starting your browser. If you will be unable to connect to the Internet at the time of assembly, you can download and cache copies of the auto-assemble

files for use offline. If you add the URL for a Web page to a HotDocs library, you can start your browser from within HotDocs and display that Web page.

In HotDocs, if you are using a template that has been enabled for answer uploading, you can upload the answers you used to assemble a document to a Web server. (Note, however, that the URL of the Web server must be specified by the template developer.)

Finally, if you use a browser other than Internet Explorer, you may need to manually register HotDocs to work with your browser.

Register HotDocs to Work with Web Browsers

If HotDocs is registered as a helper program with your Web browser, you can click on a HotDocs auto-install (.HDI) or auto-assemble (.HDA) file listed on a Web page and have your browser start HotDocs and pass the file to it.

The HotDocs installation program automatically registers HotDocs with Microsoft Internet Explorer. If you use a different Web browser, you will need to register HotDocs as a helper program yourself. Specific instructions for your browser should be available in your browser's online help system. (Search for the keywords MIME types, file types, helper programs, or associations.)

To register HotDocs with a Web browser (other than Internet Explorer)

1. Find your browser's list of MIME types. A MIME type is an association that tells the browser what to do when you download a particular type of file. Each entry in the list of MIME types consists of a MIME type, one or more associated file name extensions, and an action to take on files of this type—usually either by displaying the file in the browser, by using a plug-in to view it, or by starting a helper program. Depending on the browser, each entry may also have a descriptive name.
2. For HotDocs auto-assemble files, make an entry in the MIME types list using the following settings:

Option	Value
Name (optional)	HotDocs Auto-Assemble File
MIME type	application/x-hotdocs-auto
Extension	hda
Launch Application	hd_dispatch.exe /ha=
	By default, the launch application executable is found in C:\Program Files\HotDocs 6.

- For HotDocs auto-install files, make an entry in the MIME types list using the following settings:

Option	Value
Name (optional)	HotDocs Auto-Install File
MIME type	application/x-hotdocs
Extension	hdi
Launch Application	hd_dispatch.exe /hi=
	By default, the launch application executable is found in C:\Program Files\HotDocs 6.

- Save these settings and restart your browser.



If you upgrade or change browsers after installing HotDocs, you may need to reinstall HotDocs so it will be registered correctly with the new browser.

Add an Auto-Assemble File on the Internet to a HotDocs Library

You can add an auto-assemble file located on the Internet to the HotDocs library. You must know the URL for the file's location on the Internet or intranet. When you select the auto-assemble file at the library window, and click the **Assemble** button, HotDocs downloads the file and begins assembling.

To make sure you always have the most current version of the auto-assemble file, you must be connected to the Internet at the time you assemble it. Otherwise, HotDocs uses the version of the file that has been cached.

To add an Internet-based auto-assemble file to a library

- At the HotDocs library window, select the folder in which you want the auto-assemble file and click the  **Add** button. The **Add Item** dialog box appears.
- In the **Type** drop-down list, select **Auto-Assemble File**.
- At the **File name** field, type the URL for the file's location on the Internet or intranet, or click the  **Browse** button to locate the file on your local disk or network and click OK.

Make sure the URL is entered correctly. If you don't include **http://** or **https://** or **ftp://** (or if you are missing a slash or a colon), HotDocs will treat the URL as a regular file path.

- In the **Title** field, type a title for the auto-assemble file. The title identifies the file in the template library.

5. Optionally, type a description in the **Description** field. The description appears at the **Properties** tab

The first time you use an auto-assemble file that is stored on a Web server to assemble a document, HotDocs caches the HDA on your hard disk. Then, each time you use the file, it checks to see if a newer version of the file is available and, if so, automatically downloads it. You can also force HotDocs to check for newer versions by choosing **Refresh Cache** from the **Tools** menu. (See [Download Auto-Assemble Files for Use Offline](#).)

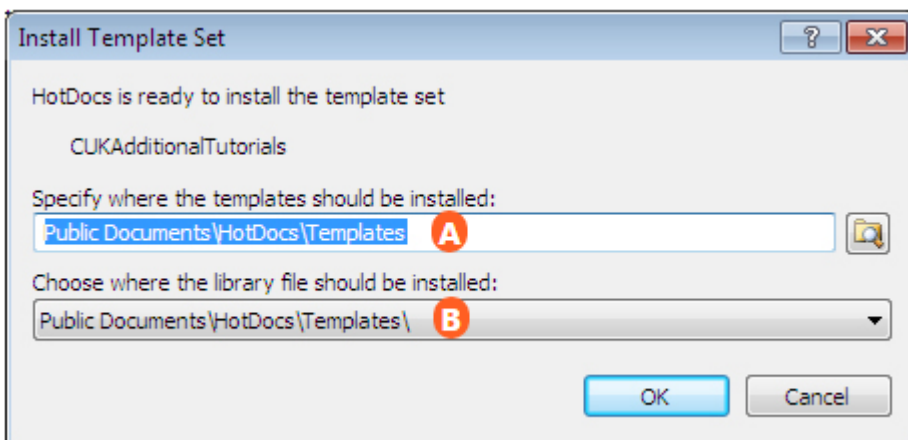
Download Auto-Assemble Files for Use Offline

In HotDocs, you can download the latest version of an auto-assemble (.HDA) file and store it on your local drive. When you are assembling, if HotDocs can't connect to the Internet or intranet, it uses the local copy.

To download auto-assemble files for use offline


1. At the HotDocs library window, select the auto-assemble file you want to download. You can download all the auto-assemble files in a folder by selecting the folder.
2. Click **Refresh Cache** (**Tools** menu).

At a Glance: The Install Template Set dialog box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

You can open the **Install Template Set** dialog box by clicking **Install Templates...** in the **File** menu and navigating to the **.hdi** file you would like to install.

In the first field **A** you can enter where you would like HotDocs to save the template files on your computer. Either by typing the file path into the text field or by clicking the  **Browse** button and navigating to the correct folder. By default HotDocs will install them in the default **Templates** folder in your Documents.

Using the drop-down list **B** below you can choose to install the library file in the default **Templates** folder, default **Libraries** folder or in the same folder you specified for the templates in the field above **A**.


To find out more about installing template sets follow the link below:

- [Install a Template Set](#)

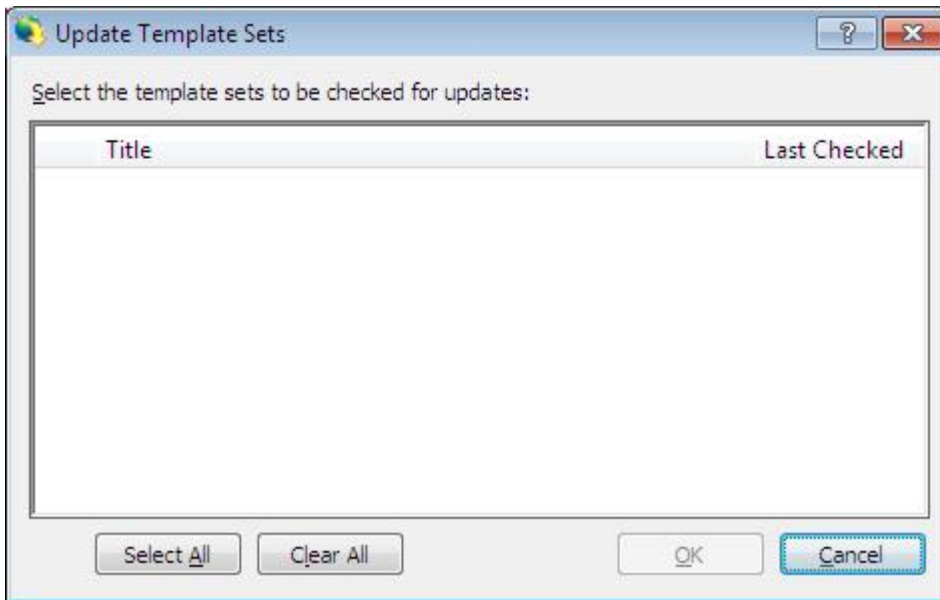
Install a Template Set

Some template sets are published as an auto-install file. Because these templates are published, you can't simply add the templates to an existing library. Instead, you must first install them. When you do, HotDocs installs the library and templates to the locations you specify. You can then access the templates.


To install a template set

1. At the HotDocs library window, click **Install Templates** (**File** menu). The **Install Templates** dialog box appears.
2. Locate and select the auto-install (.HDI) file you want to install, then click **Install**. The **Install Template Set** dialog box appears.
3. At the **Specify where the templates should be installed** field, accept the suggested *Template Sets* folder location, or click the  **Browse** button to choose a different location.
4. Click the **Choose where the library file should be installed** drop-down button and choose whether to save the library to the shared *Templates* folder, the user-specific *Libraries* folder, or, if you installed the templates to a custom folder in step 3, to the same folder as specified for the templates.
5. Click **OK**. HotDocs installs the template set (including the library) to the locations you specified.

At a Glance: The Update Template Sets dialog box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **Update Template Sets** from the **Tools** menu in your HotDocs Library you can see a list of your template sets and when they were last checked for updates. Use the mouse to select the sets you would like to update. Or use the **Select All** and **Clear All** buttons below to select all or none of the sets. When you have chosen the sets you would like to update click the **OK** button.

To find out more about updating template sets follow the link below:

- [Check for Template Set Updates](#)

Check for Template Set Updates

If you are using a published template set, HotDocs can check for updates to the set at regular intervals and notify you when updates are available. Updates can include new or revised template files, or they may include an important message from the template provider. Although the frequency of automatic update checks is set by the template provider, you can manually check for template set updates at any time.

To check for template set updates

1. At the HotDocs library window, click **Update Template Sets** (**Tools** menu). The **Update Template Sets** dialog box appears.

2. Select the template sets for which you want to check for updates, then click **OK**. The **Template Set Update Progress** dialog box appears, showing the progress as HotDocs checks for updates.
3. When HotDocs has finished checking for updates, the **Install Template Set Updates** dialog box appears, displaying a list of updates. You can work with this list as described in the following table:

To	Do This
Install specific update items	Select Install for each item you want to install.
Discard an update item to prevent HotDocs from prompting you to install the update	Select Discard for the item. If this box is disabled, the template provider has marked it as a required update and it cannot be discarded. (You can choose to not install the update, but it will be displayed every time you check for updates.)
View a list of discarded updates	Select Discarded updates . The list changes to include discarded items.
View a list of all installed updates	Select Installed updates . The list changes to include installed updates.
Reinstall an update	Select Installed updates , then select the update you want to reinstall from the list.

4. Click **Continue**. HotDocs installs the selected updates.

You can hide the **Template Set Update Progress** dialog box or choose which template sets are checked for updates in the HotDocs Options dialog box. (See [Determine How Frequently HotDocs Checks for Template Set Updates](#).)

Upload Answers

If a template has been enabled for answer uploading, the answers you provide to assemble a document can be uploaded to a Web server. The template developer specifies where and when answers will be uploaded. The developer may also specify that HotDocs automatically uploads the answers.

To upload answers

1. If a template is enabled for uploading answers, HotDocs automatically displays the **Upload Answers** dialog box after you assemble a document and close the assembly window. (If the **Upload Answers** dialog box doesn't appear, it means either that the template isn't enabled for answer uploading, or that the template developer specified that HotDocs must always upload the answers.)

2. Click one of the upload buttons to finish the upload process: **Upload Now** (uploads the answers immediately), **Upload Later** (lets you upload either when you start or exit HotDocs), or **Don't Upload** (doesn't upload the answers at all).

If errors occur when HotDocs tries to upload the answers (or if you click the **Upload Later** button), HotDocs creates a data file that contains the information needed about the files you need to upload. Then, every time HotDocs starts or closes, it checks to see if files are waiting to be uploaded and prompts you to upload them.



If you choose to **Upload Later**, you can then upload the files from the library window at any time by clicking **Upload Answers** (**Tools** menu).

Add a Web Page to a HotDocs Library

You can include a URL in a HotDocs template library, making it possible to open a Web page and download published files. You can also use a URL to link to a support site where information about the template set is available.

When you click a URL in the template library, HotDocs launches a Web browser and displays the specified Web page.

To add a Web page to a template library

1. At the HotDocs library, open the folder to which you want to add the URL.
2. Click the  **Add** button. The **Add Item** dialog box appears.
3. At the **Type** drop-down list, select **Web Address**.
4. In the **URL** field, enter the URL. Or, click the  **Browse** button to locate the address. Then close the browser window to save the URL to the **Add Item** dialog box.

You can prevent HotDocs from checking for field overflow during assembly. See [Set Rules for Handling Answer Overflow](#) for details.

5. In the **Title** field, enter a title for the URL. The title identifies the item in the template library.
6. Optionally, type a description in the **Description** field. The description appears at the **Properties** tab.

Assembling Documents Linked to a Database

Introduction: Assemble Documents Linked to a Database

For the most part, templates linked to database tables are assembled just like regular unlinked templates. However, instead of entering answers to questions, you select a record or records from a database table and HotDocs uses the information in those records and merges them into the assembled document. You can save your record selections in a HotDocs answer file.

Depending on how the template was designed, you may also have the ability to sort and filter records you view in the database table.


Select Records During Document Assembly

Instead of displaying questions during the interview for which you must enter individual answers, HotDocs presents a list of records from which you can choose. The information in the record or records you select will be merged into the assembled document.

In some situations, the template developer may allow you to select multiple records from the table, for example, to create a list of answers.

To select records from a database table

1. Assemble a document. (See [Assemble a Text or Form Document](#).)
2. When a database table appears, click a single row in the table, or press and hold either **Shift** or **Ctrl** to click multiple rows.
3. If selecting a single row, complete the following steps:
 - Click **Select**. HotDocs places the record in the **Selected Item** pane of the assembly window. (You can also double-click a record and have it automatically placed in the **Selected Item** pane.)
 - Click **Next**. HotDocs merges the answers from the database record into the assembled document.
4. If selecting multiple rows, complete the following steps:
 - Click **Select**. HotDocs adds the records you just selected to the **Selected Items** pane of the assembly window. (Additionally, to select multiple records, double-click the cell that uses a thicker border in the last record you selected.)
 - Optionally, select a record and click the ▲ **Up** button (moves the record up to the next row in the list of records) or the ▼ **Down** button (moves the record down to the next row in the list of records). You can also click the column headings of the **Selected Items** list to automatically sort selected rows by any field. (These options are available if the template developer has given you permission to sort your records. If these buttons do not appear, you cannot change the order of selected rows.)

- Click  **Next**. HotDocs merges the answers from the database into the assembled document.

If the template developer has assigned a filter to the table, you may see different results. For example, if only one record meets the filter criteria, that record will automatically be merged into the document without appearing in the interview. Similarly, if no records meet the filter criteria, HotDocs will ask the questions and allow you to enter your own answers. Finally, in some situations, the template developer may have opted to have any selections returned by the filter automatically merged into the assembled document without first prompting you.

To remove a selected record, you can either select a different record, or you can click  **Clear**.

To remove a single selected record from the **Selected Items** list, select the record and click **Clear**. To remove all selected records from the list, click **Clear All**.

Sort Database Records During Assembly

If the template developer has allowed it, you can sort the list of records in the database table to show the records in ascending (*A to Z, 1 to 9*) or descending (*Z to A, 9 to 1*) order. You can sort on any column in the table. Additionally, if the template developer has allowed you to select multiple records (in order to create a list of answers), you can choose which order the answers will be merged into the document.

To sort database records in alphanumeric order

1. Assemble a document. (See [Assemble a Text or Form Document](#).)
2. When the database table appears, click the heading for the column on which you want to sort. HotDocs sorts the list in alphanumeric order (*A to Z, 1 to 9*.)
3. Optionally, to sort the list in reverse alphanumeric order, click the column heading again. HotDocs lists the entries from *Z to A, 9 to 1*.
4. Optionally, if you have selected multiple records and want to control the order the answers are merged into the assembled document, click a record in the **Selected Items** list and then click the **Up** button (moves the record up to the next row in the list of records) or the **Down** button (moves the record down to the next row in the list of records). You can also click the column headings in the **Selected Items** list to automatically sort the selected items by any field.

You may also be able to filter the list of records to show only those you think will be relevant to your selection. See [Filter Database Records During Assembly](#) for details.

Filter Database Records During Assembly

If the template developer has allowed it, you can filter the list of records in the database table to show only those records you think are relevant. To do this, you specify conditions that must be met for the records to appear. You can filter based on any field in the table.

To filter a list of records in a database table during assembly

1. Assemble a document. (See [Assemble a Text or Form Document](#).)
2. When the database table appears, select **Find records where all conditions are met**. This causes filtering options to appear at the top of each database column.
3. In the database table, select the drop-down button at the top of the column on which you want to filter and select a comparison operator. A comparison operator allows you to compare two values. If the comparison results in a true statement, the record will be included. If it's false, it will not be included.
4. In the field directly below the comparison operator, type the value against which you want to filter. For example, to view only those companies whose names start with the letter **A**, you would click the drop-down button in the **Company** column, select **begins with**, and type the letter **A** in the next cell.
5. Click **Apply Filter**. HotDocs filters the list of records to show only those that meet the criteria you specified.

Once the list is filtered, you can select a record or records (see [Select Records During Document Assembly](#)) and continue with the interview.

When you apply the filter, only those records that meet every condition you specified will be returned. This is because **<all>** is selected at the **Find records where all conditions are met** prompt. You can click the drop-down button and select **<any>**, which will return a record, even if only one of the conditions is true.

You can sort a list of records in alphanumeric order. For details, see [Sort Database Records During Assembly](#).

Save Selected Records in an Answer File


If you are using a database to provide your answers during document assembly, you can save your answers using the same steps you follow when saving regular answer files. (See [Create a New Answer File](#).)

However, if you think you may need an exact replica of a document assembled from a template that includes a database component, be sure to save a copy of the document. If you try to reassemble the

document later, even if you use the same answer file, the document may not come out exactly the same because the information stored in the connected database may have changed.

Setting HotDocs Options

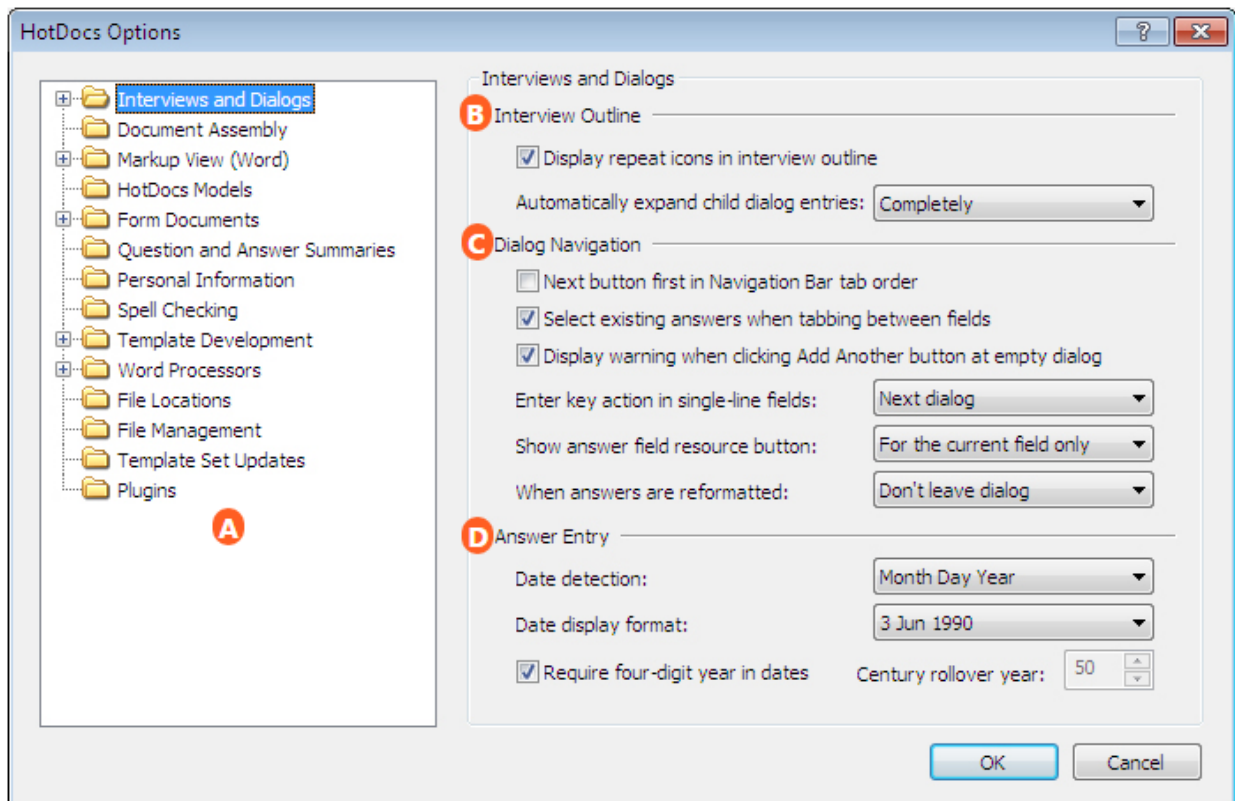
Introduction: HotDocs Options

You can change the way HotDocs looks and works by changing your preferences by clicking  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library. These changes affect the program regardless of which template you are using. (Some options, however, can be controlled at the template or component file level.)


Settings specified at HotDocs Options are user-specific and are saved in the Current User key of the Windows System Registry. For information on working with the registry, see the Windows Help file.

Interviews and Dialogs

At a Glance: Interviews and Dialogs (HotDocs Options)




Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you click on **Interviews and Dialogs** you will see the **Interviews and Dialogs Options** dialog box, from here you can set options to change how HotDocs interviews are presented.

The first section **B** has two options you can set for the interview outline. Use the check box to choose if HotDocs will display the special repeat icons in the interview outline and use the drop-down list to decide if HotDocs will automatically expand child dialog entries **Completely**, **Partially** or **Not At All**.


In the second section **C** the options relate to dialog navigation within the interview. At the top of this section there are three check box options. Using these you can decide if you would like the **Next** button to be first in tab order on the **Navigation** bar, if HotDocs should select existing answers when tabbing between fields, and/or if HotDocs should display a warning when clicking the **Add Another** button at an empty dialog. Below this are three drop down menus. The first drop-down decides whether clicking the Enter key in single-line fields moves the cursor on to the **Next dialog**, **Next answer field**, or has **No action**. The second drop-down decides if the answer field resource button is shown **For the current field only** or **For all fields with a resource**. When answers in the dialog are reformatted, the third drop-down list allows you to choose if you **Don't leave the dialog**, **Pause before leaving the dialog** or **Leave dialog anyway**.

The last section  contains options for the entering of dates in an interview dialog. The first drop-down list allows you to choose between **Day Month Year** or **Month Day Year** format for date detection. The next drop-down list allows you to choose the display format for a date in the interview. Below is a check box that let you choose if HotDocs will require four-digit years to be given in date answers. If you uncheck this box then the number field to the right will ungray. You can use this to specify the century rollover year, this decides at what two digit number HotDocs will stop using the current century and start using the previous century to fill in the first two digits. For example if you specify a rollover value of 34, dates entered as 5/14/34 will appear as 14 May 2034. A date entered as 5/14/35 will appear as 14 May 1935


To find out more about setting options for Interviews and Dialogs follow the links below:

- [Display Repeated Dialogs Using a Special Icon](#)
- [Control How Child Dialogs Appear in the Interview Outline](#)
- [Control the Tab Order of Buttons on the Navigation Bar](#)
- [Select Existing Answers When Tabbing Between Answer Fields](#)
- [Display Warning When Trying to Add a New Repetition](#)
- [Control the Functionality of the Enter Key During the Interview](#)
- [Display Resource Buttons Next to Answer Fields](#)
- [Warn When HotDocs Reformats Date and Number Answers](#)
- [Specify How HotDocs Should Process the Date Order](#)
- [Control How HotDocs Handles Two-Digit and Four-Digit Years](#)
- [Change the Way Dates Appear in Answer Fields](#)

Display Repeated Dialogs Using a Special Icon

When HotDocs starts an assembly, it displays an interview outline and a dialog pane. The interview outline contains a list of all the dialogs in a given template. The dialogs appear as icons, followed by the name of the dialog. If HotDocs encounters a repeated dialog, it can display an icon that more closely represents a repeated dialog: . When you click this icon, the interview outline expands to show each repeated dialog as entries underneath the dialog title. These entries are numbered to show which repetition you are on.

To display repeated dialogs using a special icon


1. At the HotDocs library, click  **Options**.
2. Click the **Interviews and Dialogs** folder. The window shows several options relating to the way variables and dialogs appear and are processed during the interview.
3. In the **Interview Outline** group, select **Display repeat icons in interview outline**.

To have HotDocs show repeated dialogs in the main level of the interview outline, clear **Display repeat icons in interview outline**.

Control How Child Dialogs Appear in the Interview Outline


As you assemble documents, HotDocs displays the dialogs from the template in the interview outline, which can include inserted dialogs (child dialogs). You can control just how much detail the outline shows for each parent and child dialog: a full view of all dialogs, a view of just the current dialog, or a view of just the parent dialog.

To change the appearance of child dialogs in the interview outline


1. At the HotDocs library, click the  **Options** button.
2. Click the **Interviews and Dialogs** folder. The window changes to show several options relating to the way variables and dialogs appear and are processed during the interview.
3. In the **Interview Outline** group, click the **Automatically expand child dialog entries** drop-down button and select one of the following options:
 - Choose **Completely** to have HotDocs expand the interview outline to show the relationship between all related dialogs.
 - Choose **Partially** to have HotDocs expand the interview outline to show only the dialog you are currently answering.
 - Choose **Not at all** to have HotDocs not expand the interview at all and show only the parent dialog in the interview outline.





These views are controlled when you use the navigation bar or shortcut keys to complete an interview. Once you click in the interview outline, expansion of the outline is controlled by the mouse.

Control the Tab Order of Buttons on the Navigation Bar

Sometimes as you navigate through an interview, you may press the **Tab** key to move between options in a dialog—including the buttons on the Navigation Bar. You can select an option that causes the  **Next** button to always be the first button on the navigation bar to which you tab after answering questions in the interview. When this option is cleared and you press **Tab** after the last question in the interview, HotDocs will tab to the first active button in the Navigation Bar.

To control the Navigation Bar tab order


1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Interviews and Dialogs** folder. The window changes to show several options relating to the way variables and dialogs appear and are processed during the interview.
3. In the **Dialog Navigation** group, select **Next button first in Navigation Bar tab order**.

Now when tabbing from the last answer field in the dialog to the Navigation Bar, you will automatically tab to the  **Next** button, regardless of whether the  **First Dialog**,  **Previous Unanswered**, or  **Previous** buttons are active.


Select Existing Answers When Tabbing Between Answer Fields

During an interview, you can have HotDocs automatically highlight existing text in an answer field when you tab to it. When you do this, you can immediately type a new answer without having to select the text first. If you need to edit part of an answer, rather than replace it entirely, you can clear this option.


To control text selection during the interview

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Interviews and Dialogs** folder. The window changes to show several options relating to the way variables and dialogs appear and are processed during the interview.
3. In the **Dialog Navigation** group, select **Select existing answers when tabbing between fields** to have existing text highlighted when you tab to a field.

Display Warning When Trying to Add a New Repetition

When answering repeated dialogs, you click the  **Add Another** button to add a new, empty repetition to the series of dialogs. However, if you are already in a new, empty dialog, clicking this button has no effect. You can have HotDocs display a warning that reminds you that you must first answer at least one question in the current dialog before you can add a new repetition.


To display a warning when trying to add a new repetition to a dialog

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Interviews and Dialogs** folder. The window changes to show several options relating to the way variables and dialogs appear and are processed during the interview.
3. Select **Display warning when clicking Add Another button at empty dialog**.

Control the Functionality of the Enter Key During the Interview


You can control the functionality of the **Enter** key as you enter answers in a dialog. For example, if you want to use the **Enter** key to advance to the next dialog instead of the next answer field, you can specify an option that will make this possible.

To specify how the Enter key functions during


1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Interviews and Dialogs** folder. The window changes to show several options relating to the way variables and dialogs appear and are processed during the interview.
3. In the **Dialog Navigation** group, click the **Enter key action in single-line fields** drop-down button and select an option:
 - Choose **Next dialog** to have the **Enter** key display the next dialog.
 - Choose **Next answer field** to have the **Enter** key move your cursor to the next answer field.
 - Choose **No action** to make the **Enter** key not do anything.

Pressing **Enter** in a multi-line text field will insert a line break, while pressing **Ctrl+Enter** will insert a paragraph end. (This affects Word users only.)

Display Resource Buttons Next to Answer Fields

In addition to viewing helpful information in the resource pane, you can specify an option that will display a  **Resource** button next to answer fields in the dialog pane. (Clicking this button causes the resource text to appear in a pop-up dialog.) You can also control when the button appears.

To have HotDocs display a resource button next to an answer field

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Interviews and Dialogs** folder. The window changes to show several options relating to the way variables and dialogs appear and are processed during the interview.
3. In the **Dialog Navigation** group, click the **Show answer field resource button** drop-down and select an option:
 - **For the current field only** causes HotDocs to display a resource button next to an answer field only when that field is active (or when you are answering it).

- **For all fields with a resource** causes HotDocs to simultaneously display resource buttons for all answer fields in the dialog that contain a resource. The buttons appear regardless of which answer field is active.


Warn When HotDocs Reformats Date and Number Answers

When you type an answer in an answer field, HotDocs sometimes reads the answer and reformats it to appear a certain way. For example, if you type *February 6, 2006* in a date field, HotDocs will reformat the answer to appear as *6 Feb 2006*. Sometimes this reformatting can reveal an incorrectly interpreted answer, especially if the answer you typed is ambiguous. For example, the date *05/06/2006* may either be interpreted as *June 5, 2006* or as *May 6, 2006*.

Depending on where the reformatted answer appears in the dialog, you may not even be aware that it has been reformatted. For example, when you enter an answer in one of the first answer fields in a dialog and then move to the next field, you will most likely see that your answer has been reformatted. However, if you enter an answer in the last answer field and click **Next** to advance to the next dialog, you may not see that the answer has been reformatted.

You can specify an option that forces HotDocs to alert you that an answer has changed before HotDocs advances to the next dialog.

To have HotDocs tell you it has reformatted an answer before advancing to the next dialog

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Interviews and Dialogs** folder. The window changes to show several options relating to the way variables and dialogs appear and are processed during the interview.
3. Click the **When answers are reformatted** drop-down button and select one of the following options:
 - Choose **Leave dialog anyway** to have HotDocs immediately advance to the next dialog in the interview without showing you the reformatted answer.
 - Choose **Pause before leaving dialog** to cause HotDocs to reformat the variable and re-display it for one second before advancing to the next dialog.
 - Choose **Don't leave dialog** to cause HotDocs to reformat the variable and stay at the current dialog until you click **Next** again.


This answer reformatting affects only how answers are displayed in the dialog pane. Answers in the assembled document are formatted as the developer specifies or according to the **Default date format** property.

Specify How HotDocs Should Process the Date Order

When you type an answer for a Date variable, the first thing HotDocs does to process the information is to separate what you type into the different parts of a date, for example, the month, the day of the month, and the year. Once it has determined this, it formats the date and then merges the answer into the assembled document. Often, if the user spells out the month when typing a date (for example, *May 6, 2006*), HotDocs can easily distinguish between the different parts. However, if a user enters an all-digit value, such as *05/06/2006*, HotDocs could process the date one of two ways—either as *May 6, 2006* or as *5 June 2006*.

You can specify an option that tells HotDocs the order in which you want months and days of months to be processed—either as *Month Day Year*, or as *Day Month Year*.

To specify a date order format for Date variables

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Interviews and Dialogs** folder. The window changes to show several options relating to the way variables and dialogs appear and are processed during the interview.
3. At the **Answer Entry** group, click the **Date Detection** drop-down list and select a format:
 - Choose **Month Day Year** to have HotDocs assume the first set of numbers in an answer is the month while the second set is the day of the month.
 - Choose **Day Month Year** to have HotDocs assume the first set of numbers in an answer is the day of the month while the second set represents the month.

For HotDocs users in the United States, the default option is *Month Day Year*. For HotDocs users outside the U.S., the default option is *Day Month Year*.

To specify the format for the answer when it is merged into the assembled document, see [Specify a Default Date Format](#).

Control How HotDocs Handles Two-Digit and Four-Digit Years


As a safety precaution, HotDocs requires you to enter four digits when entering the year portion of a date. If you enter a two-digit date, such as *7/9/99*, HotDocs responds with this message: "You must enter a four-digit year."

You can override this default option by specifying a century rollover year at the HotDocs Options dialog box. The number you enter controls how HotDocs interprets two-digit years. Two-digit years less than or

equal to the number you enter are understood as 2000-century years. Two-digit years greater than the number you enter are understood as 1900-century years.

For example, if you specify a rollover value of 34, dates entered as 5/14/34 will appear as *14 May 2034*. A date entered as 5/14/35 will appear as *14 May 1935*.


To set a century rollover preference

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Interviews and Dialogs** folder. The window changes to show several options relating to the way variables and dialogs appear and are processed during the interview.
3. In the **Answer Entry** group, clear **Require four-digit year in dates**. The **Century rollover year** option becomes available, with the default rollover value of **50** selected.
4. Type a new two-digit number value in the **Century rollover year** field (or click the up or down arrows to select a number.) Dates you enter where the year is greater than this value will appear as 19??, while dates where the year is less than this value will appear as 20?? (where ?? represents the year you type at the answer field.)

Change the Way Dates Appear in Answer Fields

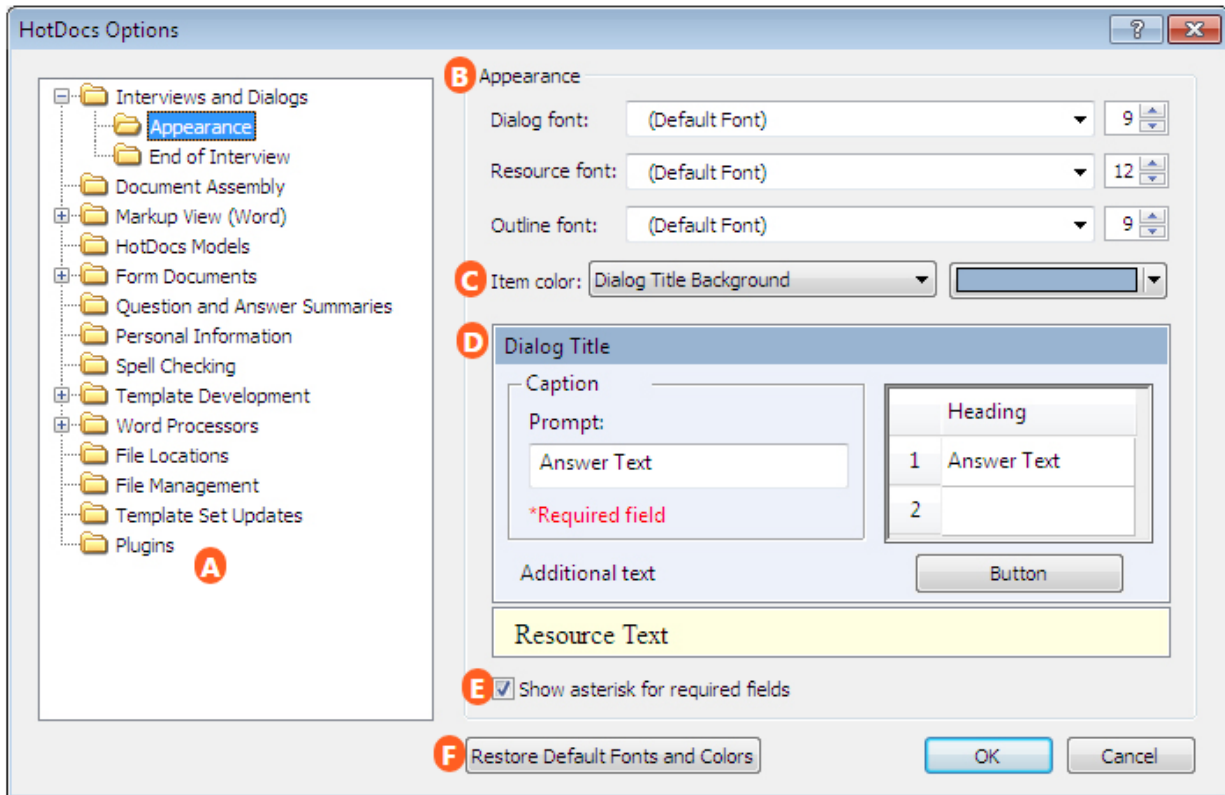
As you enter dates during an interview, HotDocs reformats the date to appear a certain way in the answer field. You can change this format. (To change the format of dates in the assembled document, see [Specify a Default Date Format](#).)

To change the way dates appear in an answer field


1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Interviews and Dialogs** folder. The window changes to show several options relating to the way variables and dialogs appear and are processed during the interview.
3. At the **Answer Entry** group, select a date format from the **Date display format** drop-down list. Your options include **3 Jun 1990**; **June 3, 1990**; **6/15/1990**; and **15/6/1990**.

Whether the 6/15/1990 format or the 15/6/1990 format is available depends on your date detection format.

At a Glance: Appearance (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you double click on **Interviews and Dialogs** you will see a list below showing **Appearance** and **End of Interview**. Click on **Appearance** and the **Appearance Options** dialog box opens, from here you can customize the look of the interview.

At the top of this dialog **B** there are three drop-down menus to change the font for the **Dialog**, **Resource** and **Outline**. To the right of each font field there is a number field to choose the text size.

Below these are two drop-down menus **C** which you can use to change the color of items in the dialog pane. Find the item you wish to change in the first drop-down list then click the second menu to choose a color from the palette. You will see the changes in the example dialog pane below **D**. Below the example dialog pane is a check box **E** where you can choose to show an asterisk for required fields.

At the bottom of the page is the **Restore Default Fonts and Colors** button **F**. You can use this to return the all the settings on this page back to their original values.

To find out more about setting options for Appearance follow the link below:


- [Customize the Look of the Dialog Pane](#)

Customize the Look of the Dialog Pane

You can change the appearance of the dialog pane. Specifically, you can change background colors and text properties (such as font face, size, and color). You can also change some of the properties of the resource pane as well as the interview outline.

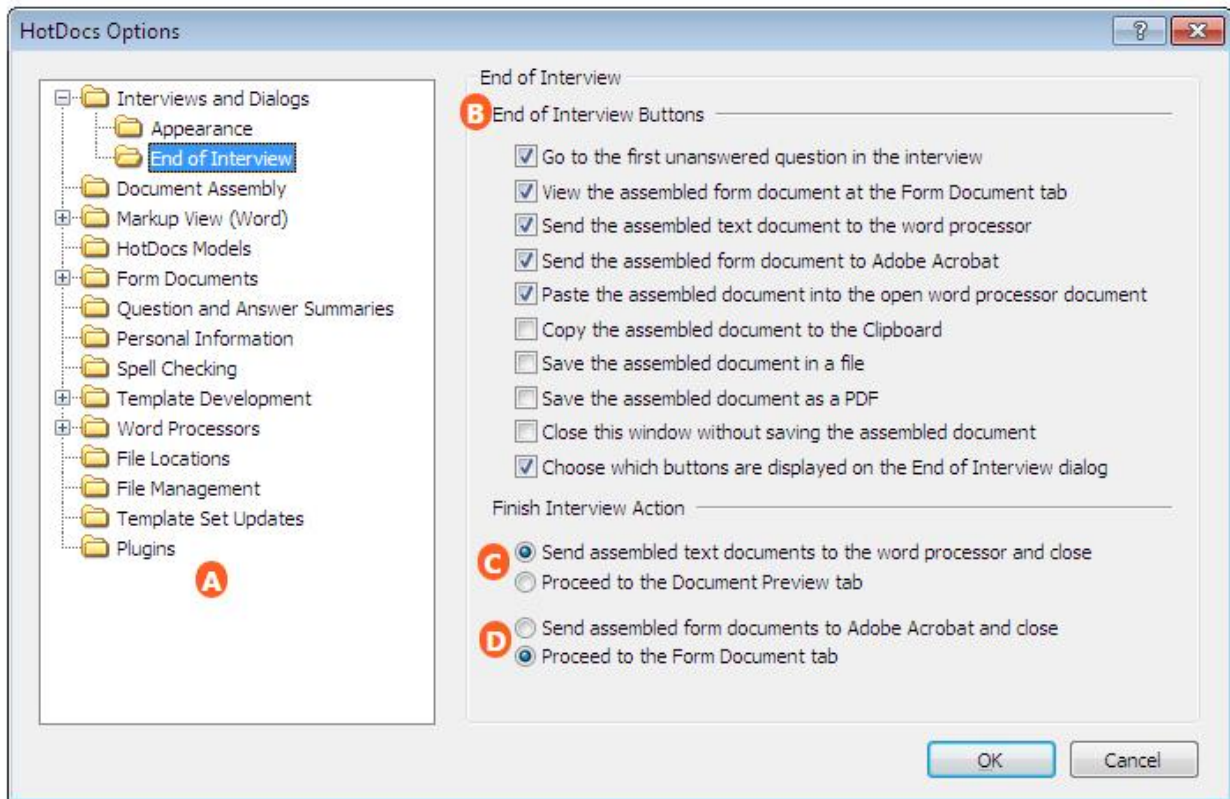
To restore all default properties after you have changed them, at the **Appearance** window, click **Restore Default Fonts and Colors**.

To change the appearance of the dialog, resource pane, or interview outline of the assembly window


1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Double-click the **Interviews and Dialogs** folder. The folder expands to show subfolders.
3. Click the **Appearance** subfolder. The window changes to show a visual representation of the dialog pane.
4. Make any changes, based on the following options:
 - To change the font or font size for text in the dialog, click the **Dialog font** drop-down button and choose the font from the list and enter a size in the **Font size** field.
 - To change the font or font size for text in the resource pane, click the **Resource font** drop-down button and choose the font from the list and enter a size in the **Font size** field.
 - To change the font or font size for text in the interview outline, click the **Outline font** drop-down button and choose the font from the list and enter a size in the **Font size** field. (To see these changes take effect, you must start a new assembly.)
 - To change the color of an item in the assembly window, click the **Item color** drop-down button and choose the item from the list. Then click the color drop-down button and choose the color.
 - To have HotDocs mark required questions with an asterisk, select **Show asterisk for required fields**.

In addition to choosing the item whose properties you want to change using the drop-down lists, you can also click on an area in the dialog preview. This automatically selects the item (in the corresponding drop-down list) so you can then change the properties.

At a Glance: End of Interview (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you doubleclick on **Interviews and Dialogs** you will see a list below showing **Appearance** and **End of Interview**. Click on **End of Interview** and the **End of Interview Options** dialog box opens, from here you can decide how HotDocs will finish an interview and what buttons appear at the end of interview dialog.

The top set of check boxes **B** enable you to decide which buttons appear on the End of Interview dialog; you can choose as many or as few as you need.

Below that are two sets of check boxes; the top set **C** allow you to choose what will automatically happen when you finish an interview for a text document and the bottom set **D** allows you to choose what will automatically happen when you finish an interview for a form document.

The option to **Send assembled form document to Adobe Acrobat and close** does not work with .HFT templates as they are not PDF based templates. Selecting this option instead sends

them to HotDocs Filler. If you need to send the assembled form to Adobe Acrobat you should save your .HFT templates as .HPT templates before choosing this option.


To find out more about setting options for End of Interview follow the links below:


- [Customize the End of Interview Dialog](#)
- [Control What Happens When You Finish an Interview](#)

Customize the End of Interview Dialog

Options in the *End of Interview* dialog allow you to work with assembled documents. Such options include sending documents to the word processor, saving them to disk, or closing the assembly window without doing anything. You can choose which of these options appear in the *End of Interview* dialog.



To choose which options appear in the End of Interview dialog

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Double-click the **Interviews and Dialogs** folder. The folder expands to show subfolders.
3. Click the **End of Interview** subfolder. The window changes to show which buttons you can choose to have appear in the *End of Interview* dialog.
4. In the **End of Interview Buttons** group, choose which buttons you want on the *End of Interview* dialog by selecting the corresponding check box.


Buttons will be included only if they are selected and if they are relevant to the current interview. For example, HotDocs will display the  **Go to the first unanswered question in the interview** button only if there is at least one unanswered question in the interview.

To customize the list of buttons while viewing the *End of Interview* dialog, you can right-click anywhere in the dialog and choose **Change Options** from the shortcut menu.


Control What Happens When You Finish an Interview



By default, when you click  **Next** at the last dialog in an interview, HotDocs displays the **End of Interview** dialog, which gives you options for working with the assembled document. For example, you can choose to send the assembled document to the word processor or Filler, or you can return to the interview and answer any unanswered questions. However, if the **End of Interview** dialog is hidden (see [Use the End of Interview Dialog](#)), clicking  **Next** simply displays the assembled document. Where you

view the document, either in the assembly window or in the word processor or HotDocs Filler, depends on which options you select.

Likewise, when you click the  **Finish** button in the navigation bar, HotDocs displays the assembled document. Again, you can choose where you view the document.

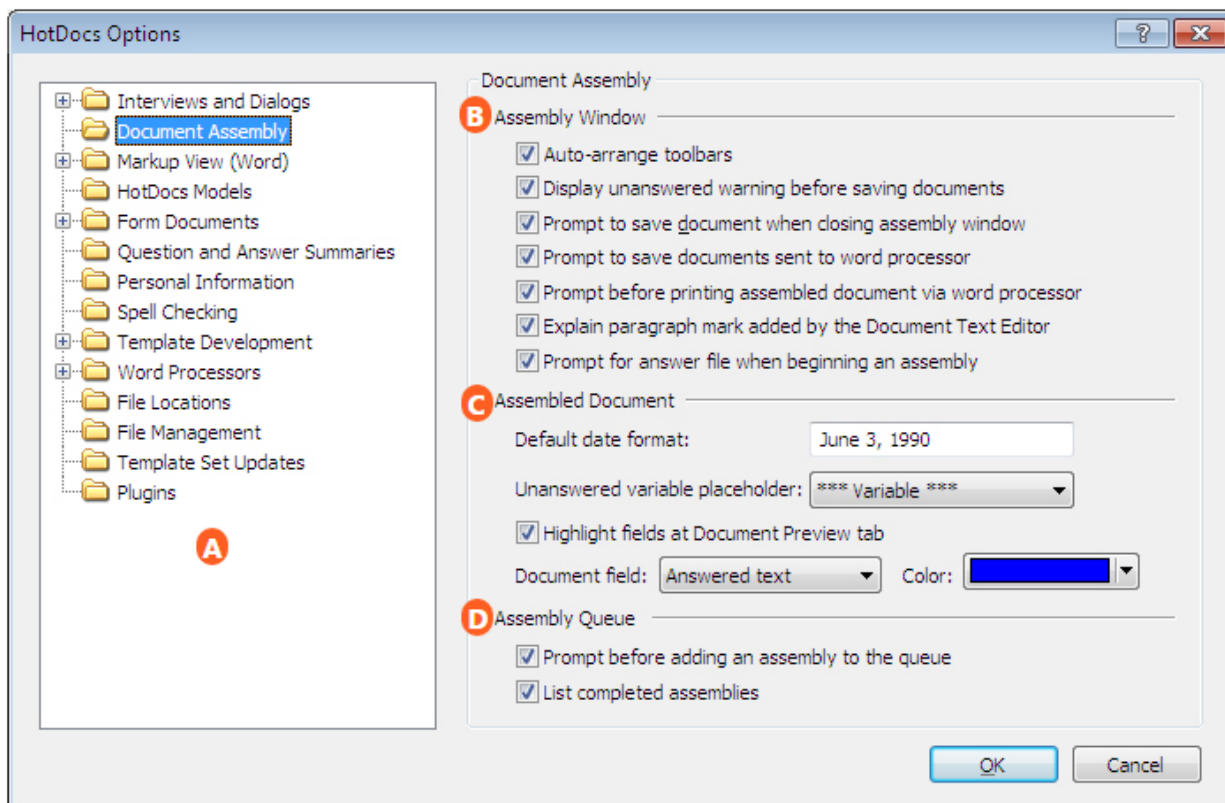
To define how HotDocs should finish an interview

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Double-click the **Interviews and Dialogs** folder. The folder expands to show subfolders.
3. Click the **End of Interview** subfolder. The window changes to show options for working with the *End of Interview* dialog.
4. In the **Finish Interview Action** group, select an option for text documents:
 - To send all assembled text documents directly to the word processor, select **Send assembled text documents to the word processor and close**.
 - To view all assembled text documents directly at the **Document Preview** tab of the assembly window, select **Proceed to the Document Preview tab**.
5. Select an option for form documents:
 - To send all assembled form documents directly to HotDocs Filler, select **Send assembled form documents to HotDocs Filler and close**.
 - To view all assembled form documents at the **Form Document** tab of the assembly window, select **Proceed to the Form Document tab**.


Now, whenever the **End of Interview** dialog is hidden and you click  **Next** at the last dialog in the interview, HotDocs will perform the action you specified. Additionally, whenever you click the  **Finish** button, the same action will be performed.

Document Assembly

At a Glance: Document Assembly (HotDocs Options)




Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.


After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you click on **Document Assembly** you will see the **Document Assembly Options** dialog box, from here you can set options to decide how HotDocs assembles a document.

The first section **B** has seven check box options to help you customize the assembly window. By checking these you can choose to auto-arrange toolbars, display the unanswered warning before saving a document, prompt to save the document when closing the assembly window, prompt to save documents sent to a word processor, prompt before printing assembled documents via a word processor, explain the paragraph mark added by the document text editor, and/or prompt for an answer file when beginning an assembly.

The setting **Explain the paragraph mark added by the document text editor** refers to the final paragraph mark in the text editor shown when editing a SPAN. When ticked, this option displays an explanation of this paragraph mark when editing SPAN fields during an interview. Uncheck this box to suppress the dialog box containing that explanation.

In the next section  you can change settings to change the look of an assembled document. In the text field at the top the default date format is displayed. To change this you just need to delete the text and type in your preferred date format example. using the drop down list below you can chose what an unanswered variable placeholder will look like in the assembled document. Below that is a check box giving you the option to highlight fields at the **Document Preview** tab. At the end of this section are two drop down lists that allow you to specify the color of different parts of the document. From the first drop down menu you chose a document field from: **Answered Text**, **Unanswered Text**, **Editable Text** or **Edited Text**. Then click the **Color** drop-down list and chose the color you would like this field type to be from the color palette.

The last section  has two check box options to change settings for the assembly queue. Checking the top box will have HotDocs prompt you before adding an assembly to the queue and checking the bottom box will have HotDocs produce a list of completed assemblies.


To find out more about setting options for Document Assembly follow the links below:

- [Make Assembly Window Toolbars Automatically Wrap](#)
- [Display Warning When Questions are Unanswered](#)
- [Prompt to Save the Assembled Document When Closing the Assembly Window](#)
- [Warn When Printing Assembled Text Documents](#)
- [Prompt to Select an Answer File Before Assembly](#)
- [Specify a Default Date Format](#)
- [Format Unanswered Variables in a Document](#)
- [Set Properties for Viewing Answers and Editable Text in the Assembled Document](#)
- [Warn When Adding Assemblies to Assembly Queue](#)
- [Include List of Completed Assemblies in Assembly Queue](#)

Make Assembly Window Toolbars Automatically Wrap

The HotDocs assembly window includes several toolbars to help you accomplish the work you need. At times, the width of the assembly window won't allow all of the toolbars to be displayed at once—some of the toolbars scroll off the right edge of the window. You can select an option that allows those toolbars to wrap to a new line of the assembly window so you can view all of them at once.


To auto-wrap assembly window toolbars

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Document Assembly** folder. The window changes to show several assembly options
3. Select **Auto-arrange toolbars**.

Display Warning When Questions are Unanswered

As you complete a HotDocs interview, HotDocs keeps track of which questions you have answered. You can have HotDocs display a warning message if you attempt to send the document to the word processor without answering one or more questions. (The warning also appears when you save or print the document.) Leaving questions in an interview unanswered may result in an incorrectly assembled document. Heeding these warnings can help you ensure the accuracy of the document.

To have HotDocs display a warning when variables are unanswered


1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Document Assembly** folder. The window changes to show several assembly options.
3. Select **Display unanswered warning before saving documents**.

If you don't want HotDocs to warn you about unanswered questions, clear **Display unanswered warning before saving documents**. Unanswered questions will still be reported in the *End of Interview* dialog, but HotDocs will no longer display warning messages.

Prompt to Save the Assembled Document When Closing the Assembly Window

Whenever you close an assembly window, either before or after you send the assembled document to the word processor, HotDocs can ask if you want to save a copy of the assembled document.

To have HotDocs prompt you to save the assembled document

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Document Assembly** folder. The window changes to show several assembly options.
3. Select **Prompt to save document when closing assembly window**. HotDocs will prompt you to save a copy of the assembled document whenever you close the assembly window.
4. Optionally, select **Prompt to save documents sent to word processor** to have HotDocs prompt you to save a copy of the assembled document when you close the assembly window, even if you have sent the document to the word processor.


Depending on your project needs, you may not need to save electronic versions of your documents. In such cases, you can clear both of these options.

Warn When Printing Assembled Text Documents

When you print an assembled text document from the assembly window, HotDocs opens the document in the word processor, prints it using the default printing options, and then closes the word processor without ever displaying a **Print** dialog box.

Frequently, you may need to change the default printing options, which you can only do by sending the assembled document to the word processor and then by printing from the word processor's **File** menu. To help you remember this sequence of steps, you can have HotDocs warn you when it's about to print a document without displaying the **Print** dialog box. If you choose, you can stop the print job.


To display the Print warning

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Document Assembly** folder. The window changes to show several assembly options.
3. From the **Assembly Window** group, select **Prompt before printing assembled document via word processor**.

Prompt to Select an Answer File Before Assembly

You can have HotDocs prompt you to select an answer file when you assemble a document. When it does, you can choose to use an existing answer file; specify a new, untitled answer file; or use the answer file from your last assembly.

To have HotDocs prompt you for an answer file


1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Document Assembly** folder. The window changes to show several assembly options.
3. Select **Prompt for answer file when beginning an assembly**.

Clear **Prompt for answer file when beginning an assembly** to have HotDocs bypass this option and start the interview immediately using an untitled answer file. Once the interview has started, you can save the current answer file at any time.

Specify a Default Date Format

You can specify a default format for dates that are merged in assembled documents. This default format is used if no format has been assigned by the template provider. It controls how dates are merged into the assembled document—not how dates are formatted for display during the interview. (See [Change the Way Dates Appear in Answer Fields](#).)


To specify a default date format

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Document Assembly** folder. The window changes to show several assembly options.
3. Type a date format in the **Default date format** field. (Use one of the following example formats: **June 3, 1990**; **3 June 1990**; **03 JUN 90**; **06/03/90**; or **3rd day of June, 1990**.)

Format Unanswered Variables in a Document

You can specify how an unanswered variable will appear in an assembled text document. (If a variable is left unanswered in a form document, the form field is left empty, regardless of which unanswered variable placeholder you have selected.)

To specify an unanswered variable format

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Document Assembly** folder. The window changes to show several assembly options.
3. At the **Unanswered variable placeholder** drop-down list, make a selection based on the following information:
 - Select *****Variable***** to insert the name of the variable with three asterisks on both sides of the variable name.
 - Select **[Variable]** to insert the name of the variable between two brackets.
 - Select **Underscores** to insert a blank line where the answer should be.
 - Select **Asterisks** to insert three asterisks.
 - Select **Nothing** to insert nothing in the unanswered field, not even a space.

Sometimes a template developer may assign a placeholder to be used with a variable. If so, the document may show a placeholder that is different than what you select here.


If you are using Microsoft Word (and the template developer has enabled answer editing at the **Document Preview** tab), you can edit answers while viewing the document. See [Edit Answers at the Document Preview Tab](#).

Set Properties for Viewing Answers and Editable Text in the Assembled Document

If you are using Microsoft Word, you can view answers and assembled document text that can be edited while viewing the **Document Preview** tab. (See Edit Answers at the Document Preview Tab for details.) When doing this, you can control whether the answers and text are marked by a special color, which you can also define.

Some template developers choose to disable these features in their templates. If the options for editing answers and text are not available at the assembly window, this is why.

To always highlight answers and editable text in a document


1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Document Assembly** folder. The window changes to show several assembly options.
3. Select **Highlight fields at Document Preview tab**. This will mark answers in the document with the color you define at the **Color** drop-down. It will also mark editable document text as well as edited document text.
4. Optionally, to change the color for answer fields or sections of editable text, click the **Document field** drop-down button, and choose the appropriate option. Then click the **Color** drop-down button and choose a color.

To restore the default colors, choose the field type and then click the **Color** drop-down button. Choose **Default** from the top of the **Palette** tab.

Warn When Adding Assemblies to Assembly Queue

HotDocs will only allow you to assemble one document at a time. If you are currently assembling a document and you attempt to assemble another one, HotDocs will add it to the assembly queue and it won't be assembled until the current assembly is complete. If there are multiple assemblies in the queue, HotDocs will assemble them in the order they are added. (See [Use the Assembly Queue](#).) You can have HotDocs warn you when you attempt to assemble a document and one is already being assembled.


To have HotDocs warn you when you add an assembly to the queue

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Document Assembly** folder. The window changes to show several assembly options.
3. In the **Assembly Queue** group, select **Prompt before adding an assembly to the queue**.

Include List of Completed Assemblies in Assembly Queue

As you assemble documents during a given session of HotDocs, you can have HotDocs create a list of each document you have assembled in the assembly queue. This list remains active during a particular session of HotDocs. (A session is the time between when you start HotDocs and when you close it.)

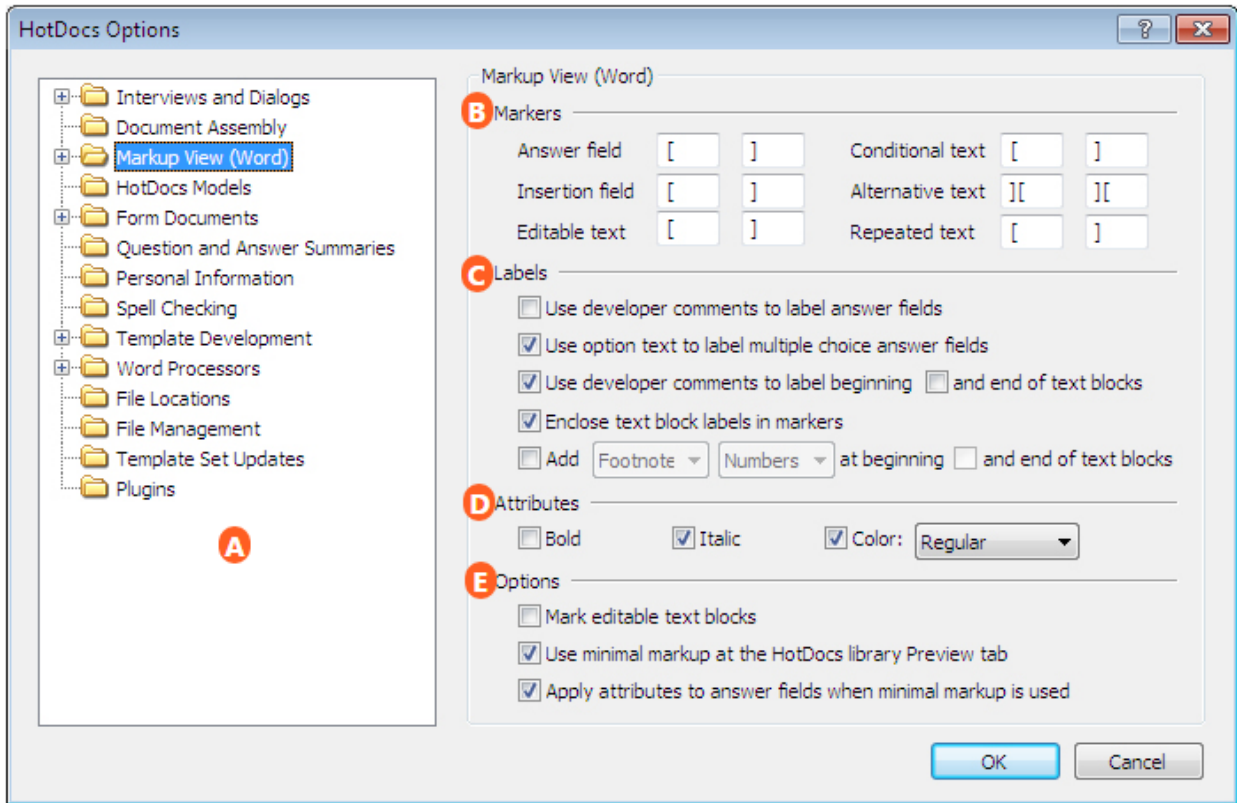
To list completed assemblies in the assembly queue

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Document Assembly** folder. The window changes to show several assembly options.
3. In the **Assembly Queue** group, select **List completed assemblies**.


If you are assembling large numbers of documents and you don't want HotDocs to track completed assemblies, clear **List completed assemblies**. Then, once assembly has finished, the assembly is removed from the queue.

Document Markup

At a Glance: Document Markup (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you click on **Markup View (Word)** you will see the **Markup View (Word) Options** dialog box, from here you can set options for the look and function of a template in markup view.

In the first section of options **B** you can choose the markers used for **Answer Fields**, **Insertion Fields**, **Editable Text**, **Conditional Text**, **Alternative Text** and **Repeated Text** by typing the characters you would like to use into the corresponding fields.

In the next section **C** you can set options for labels by ticking the check boxes. Using the first four check boxes you can choose to use developer comments to label answer fields, use option text to label multiple choice answer fields, use developer comments to label the beginning and/or the end of text blocks, and/or enclose text block labels in markers. The last check box has slightly more complicated options and ticking the last box will ungray the two drop-down menus next to it then you can use these to decide if, at the beginning and/ or end of text blocks, you would like **Footnote Letters**, **Footnote Numbers**, **Endnote Letters** or **Endnote Numbers**.

In the next section **D** you can choose which attributes to apply to markup fields. Using the three check boxes you can choose to apply **Bold**, **Italic**, and/or a different **Color** scheme. Once the **Color** box has been ticked the drop-down list next to it ungrays, then you can chose from **Regular**, **Nested**, or **Sequential** color schemes. You can further customize these schemes at the [Field Colors Options dialog](#).

The last section **E** contains three check boxes with more general options for Markup View. You can choose to mark editable text blocks, use minimal markup at the HotDocs Library **Preview** tab, and/or apply attributes to answer fields when minimal markup is used.

To find out more about setting options for Markup View (Word) follow the link below:


- [Specify How Documents Should Be Marked Up](#)

Specify How Documents Should Be Marked Up

This feature is available to Word users only.

Moving between Markup View and Developer View is supported in Microsoft Word RTF templates only. In Microsoft Word DOCX templates you can click the  **Create Markup** button to open a Markup document in a new Word window.

To specify how documents should be marked

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Markup View (Word)** folder. The window changes to show several markup options.
3. Complete any of the tasks, described in the following table:

To	Do This
Choose the character or characters that should be used to mark fields in the template	<p>Enter the opening and closing characters in the fields next to the field type:</p> <ul style="list-style-type: none"> • Answers field = variable fields • Insertion field = INSERT instructions • Editable text = SPAN / END SPAN instructions • Conditional text = IF/ END IF instructions • Alternative text = ELSE IF / ELSE instructions • Repeated text = REPEAT / END REPEAT instructions
Mark variable answer	Select Use developer comments to label answer fields . If

fields with any comments entered for the variable	comments have been entered for a variable field, they will be merged in the markup field.
Use a Multiple Choice variable's merge text options as the label for its field	Select Use option text to label multiple choice answer fields .
Mark text blocks (such as IF, REPEAT, and SPAN instructions) using developer comments entered for the instruction	Select Use developer comments to label beginning of text blocks . To merge the same comment in the closing markup field, select and end of text blocks .
Include both opening and closing markers when merging a field label (which includes developer comments)	Select Enclose text block labels in markers . Selecting this option causes HotDocs to use the closing marker after the opening label. The closing marker will also be used at the end of the text block.
By default, when HotDocs marks text blocks, an opening field marker is merged before the opening instruction and the closing marker is merged after the closing instruction.	In the following example, [* is the opening marker for conditional text while *] is the closing marker. The following is what will be merged in the marked up document: *Insert paragraph if employee must complete a trial period*] The length of [Employee Name]'s employment will be an initial term of six months.*]
Include text block instructions in either a footnote or endnote	Select Add Footnote/Endnote at beginning of text blocks. Then select whether the annotation will be marked using Letters or Numbers . To annotate the closing field label, select and end of text blocks .
Apply font attributes, such as bold and italics, to a markup field	Select Bold or Italic . Merge fields in the document are italicized by default. If you've used international characters in your answers, the italicized version of the font used in the document may not display the foreign characters correctly. If this is the case, clear the Italic attribute.
Define the color scheme used for marking the different fields in the template	Select Color and click the Color drop-down button. Then choose the color scheme .

Include editable text markers when showing a template in Markup View

Show only basic markup when previewing the template at the HotDocs library

Select **Mark editable text blocks**.

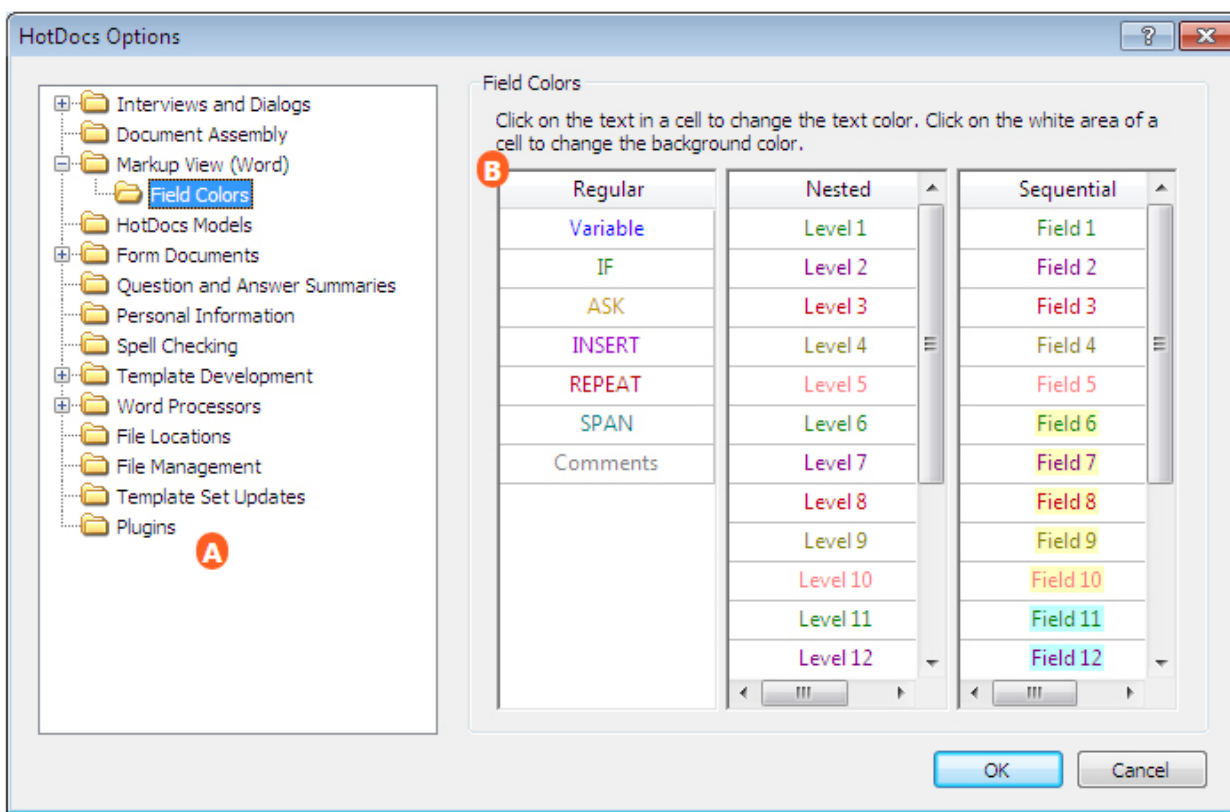
Editable text blocks are not visible when viewing the markup of an assembled document.

Select **Use minimal markup at the HotDocs library Preview tab**.



When this option is selected, HotDocs will simply mark fields using field markers. If comments have been assigned to variable fields, those comments will be merged. (They will not be merged for instruction fields, however.)

To assign font formatting and color to markup fields at the **Preview** tab, select **Apply attributes to answer fields when minimal markup is used**.


At a Glance: Field Colors (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane .

If you double click on **Markup View (Word)** you will see a list below showing **Field Colors**. Click on **Field Colors** and the **Field Colors Options** dialog box opens, from here you can set the colors HotDocs will use in Markup view.

There are three lists  for the three of available color schemes. You can choose which color scheme you would like to use on the [Markup View \(Word\) Options dialog](#). By clicking on any of the words you will see a color palette where you can choose a different text color for that item. By clicking on the white space behind any of the words you will see a color palette where you can choose a different background color for that item.

To find out more about setting options for Field Colors follow the link below:

- [Define Field Colors](#)


Define Field Colors

By default, when you insert fields in a HotDocs text template, HotDocs applies certain colors to the fields, depending on the field type. For example, all variable fields will be merged using a specific color, while all REPEAT instructions will be merged using a different color, and so forth.


Depending on the complexity of the template, there may be times when you want to use field coloring to view relationships between SPAN, IF and REPEAT instructions in the template. For example, when working with nested instructions, you may want all first-level instructions to be marked by one color, all second-level instructions to be marked by another color, and so forth. Additionally, you may want to view instructions in the template sequentially, meaning each instruction pair is marked with its own color.

At the **Field Colors** page, you can assign the colors HotDocs will use for marking fields and instructions in a template.

To customize the field colors in a text template

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Double-click the **Markup View (Word)** folder. The folder expands to show subfolders.
3. Click the **Field Colors** folder. The window changes to show lists of field types and instructions with their corresponding colors.

4. Complete any of the following steps:
 - To specify the color for all field types in a template, click that particular field in the **Regular** column and choose the color you want from the palette.
 - To specify the color for each nested level of instruction, click that particular level in the **Nested** column and choose the color you want from the palette.
 - To specify the color for each matching pair of instructions, click that field in the **Sequential** column and choose the color you want from the palette.
5. Repeat this process for each field type or level of instruction you want to change.

Once you have made these changes, you must click the  **Apply Colors** button within your template to apply the new colors to any existing fields.

HotDocs allows you to assign up to 20 Nested and Sequential colors. If you want to use fewer color schemes, select the Level or Field after the last color you want used and assign black as the text color and white as the highlight color. (So, for example, if you want to show only four levels of nesting, click on Level 5 and assign the black/white color combination.)

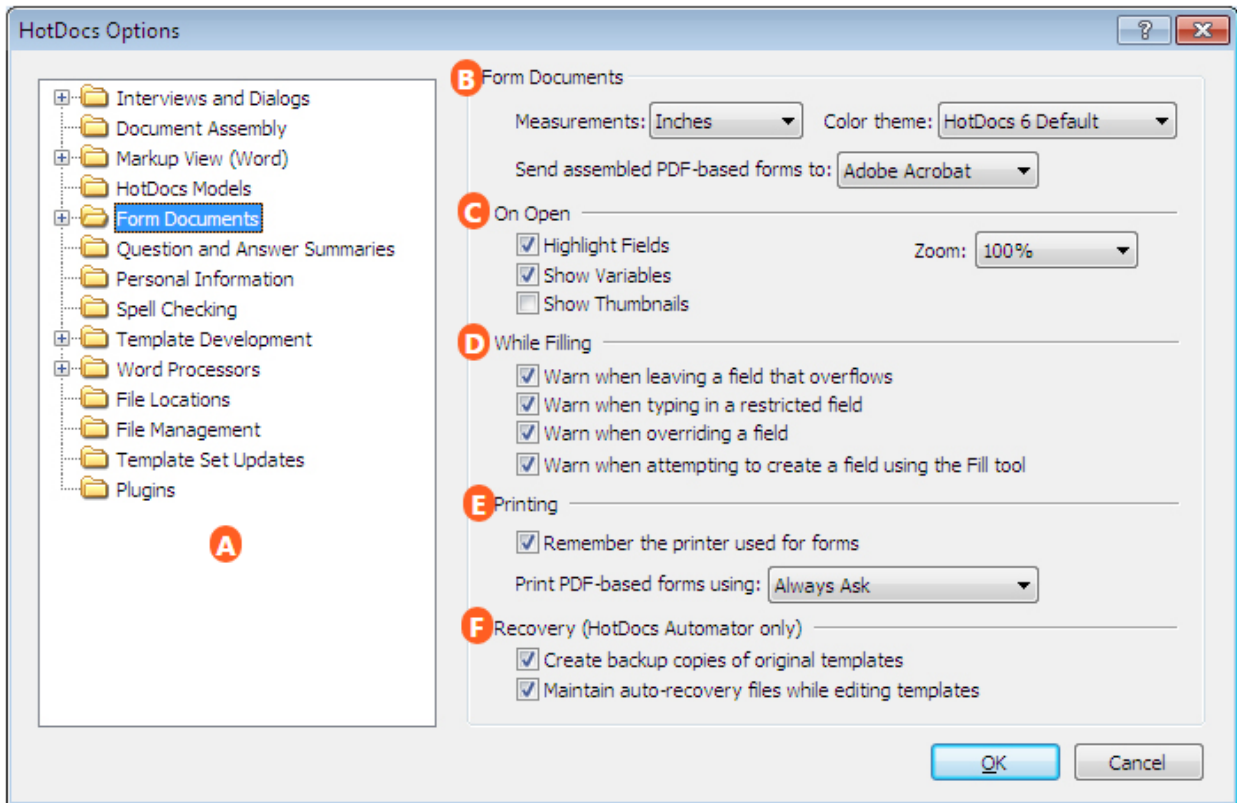
If using the keyboard, tab to the row you need to access and press the **Spacebar** to show the foreground color palette. Press **Shift+Spacebar** to show the background color palette.

To restore default colors, click the **Color** drop-down button and choose **Default** at the top of the **Palette** tab.


To choose the colors used for form fields, see [Change Colors in Form Fields](#).

Form Documents

At a Glance: Form Documents (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you click on **Form Documents** you will see the **Form Documents Options** dialog box, from here you can set options to decide how new form documents appear and function.

This section of options **B** at the top of this dialog allow you to choose some of the main setting for new form documents. Using the three drop-down lists you can select the type of measurements used in the document, which color theme to use for HotDocs Automator; you can choose whether to automatically send PDF-based forms to Adobe Acrobat or HotDocs Filler.

The option to **Send Assembled PDF-based forms to Adobe Acrobat** does not work with .HFT templates as they are not PDF based. If you need to send the assembled form to Adobe Acrobat you should save your .HFT templates as .HPT templates before choosing this option.

The next section **C** allows you to set options on how the form document first appears upon opening. You can use the three check boxes to decide if you would like HotDocs to highlight fields, show variables, and/or show thumbnails. Using the drop-down list to the right you can also decide on the initial zoom level for the form.

In the next section **D** you can choose which warnings HotDocs can display when filling. You can have HotDocs warn when leaving a field that has overflowed, warn when typing in a restricted field, warn when overriding a field, and/or warn when attempting to create a field using the fill tool.

In the section below **E** you can set two options for printing form documents. You can tick the check box to have HotDocs remember the printer used for forms and you can choose from the drop-down list whether you use **HotDocs**, **Adobe Acrobat**, or HotDocs should **Always Ask** which program to use to print PDF-based forms.

In the last section **F** there are two check box options that allow you to set options for recovery in HotDocs Automator. Check the first box to have HotDocs create backup copies of the original templates and check the second box to have HotDocs maintain auto-recovery files while you are editing templates.


To find out more about setting options for Form Documents follow the links below:

- [Change the Units of Measurement for Forms](#)
- [Change Colors in HotDocs Forms](#)
- [Send Assembled PDF Documents to Adobe](#)
- [Control How Forms Appear When Opened](#)
- [Control Warnings During Assembly](#)
- [Save Printer Information for Printing Forms](#)
- [Specify How PDF-based Forms Should Be Printed](#)
- [Protect Forms By Backing Them Up](#)

Change the Units of Measurement for Forms

HotDocs measures the fields you create to identify whether they should be treated as check-box fields or edit fields. In addition, the units of measurement affect the margins around all fields and the amount of space used by the header and footer sections of the addendum.


To change the units of measurement

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Form Documents** folder. The right pane changes to show options for working with forms.
3. Click the **Show measurements in** drop-down button and select **Inches**, **Points**, **Centimeters**, **Picas**, or **Millimeters**.

Change Colors in HotDocs Forms


You can change the colors for field backgrounds and borders in HotDocs . Changes affect all forms edited or assembled using HotDocs. There are several custom color schemes from which you can choose.

To change colors


1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Form Documents** folder. The view changes to show general form options.
3. Click the **Color theme** drop-down button and select a color scheme.

To change the colors used for text template fields, see [Define Colors for Fields and Instructions](#).

Send Assembled PDF Documents to Adobe

You can select an option that allows you send an assembled PDF-based document to Adobe Acrobat. When this option is selected, you can click the  **Send Document to Adobe Acrobat** button and HotDocs will send the form document to Acrobat rather than HotDocs Filler. (If you want to view the assembled form document in Filler, you can still choose this option, too.)

To send assembled PDF-based documents to Adobe


1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Form Documents** folder. The right pane changes to show options for working with forms.
3. Click **Send assembled PDF-based forms to** drop-down button and choose **Adobe Acrobat**.

To always send PDF-based forms to HotDocs Filler, click **Send assembled PDF-based forms to** and choose **HotDocs Filler**.

Control How Forms Appear When Opened

When you open a form in HotDocs , different views of the form can be shown, such as fields and thumbnail views of form pages. You can control which views appear, as well as what level of magnification is used. These settings are used each time you open a form.

To control how forms appear when opened

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Form Documents** folder. The right pane changes to show options for working with forms.
3. In the **On Open** group, select options that control the view when you open a form, as described in the following table:

To	Do This
Display the colored fields	Select Highlight Fields .
Display thumbnail images of each page of the form	Click Show Thumbnails . The thumbnails appear in a separate pane in the window. You can click on the thumbnail images to move through the form.
Display forms at actual size.	Click Zoom and select 100%
Match form width to the left and right edges of the window	Click Zoom and select Fit to Width .
Matches form height to the top and bottom edges of the window	Click Zoom and select Fit to Height .


You can hide the fields, variables, and thumbnails by clearing these options.

To change the colors used for form fields, see [Change Colors in HotDocs Forms](#).

Control Warnings During Assembly

When you assemble form documents, situations may arise where your answers may be altered. These situations include when answers overflow the field, or when field settings are different. HotDocs can warn you in such situations.

To control warnings that display during assembly

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Form Documents** folder. The right pane changes to show several options for working with forms.
3. In the **While Filling** group, make selections based on the following information:


- Select **Warn when leaving a field that overflows** to display the **Overflow Status** dialog box when an answer needs more space than the field allows.
- Select **Warn when typing in a restricted field** to display the **Restricted Field** dialog box when you type in a field that can't be answered until other fields have valid answers.
- Select **Warn when overriding a field** to display the **Override Field** dialog box when you choose to override a field.
- Select **Warn when attempting to create a field using the Fill tool** to display a message explaining how to create a field when viewing the **Form Document** tab of the assembly window.

You can choose to have no warnings appear by clearing these options. This will not automatically resolve answer overflow or allow you to type answers in inactive fields. It only means no warnings will be displayed during the interview or direct-fill. When you attempt to save or print the document, you must resolve the overflow.

Save Printer Information for Printing Forms

Forms may need to be printed using a specific printer. You can have HotDocs remember which printer you use to print form documents, saving you the task of manually selecting the printer each time, especially when the printer you use for forms is different than your default printer.

To save information about the printer you use to print forms


1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Form Documents** folder. The right pane changes to show several options for working with forms.
3. From the **Printing** group, select **Remember the printer used for forms**.
4. Print a form document, selecting the printer you want to associate with forms.

You can have HotDocs *not* remember printer information by clearing this option. This means HotDocs will suggest the default printer you have selected for *all* printing.

Specify How PDF-based Forms Should Be Printed

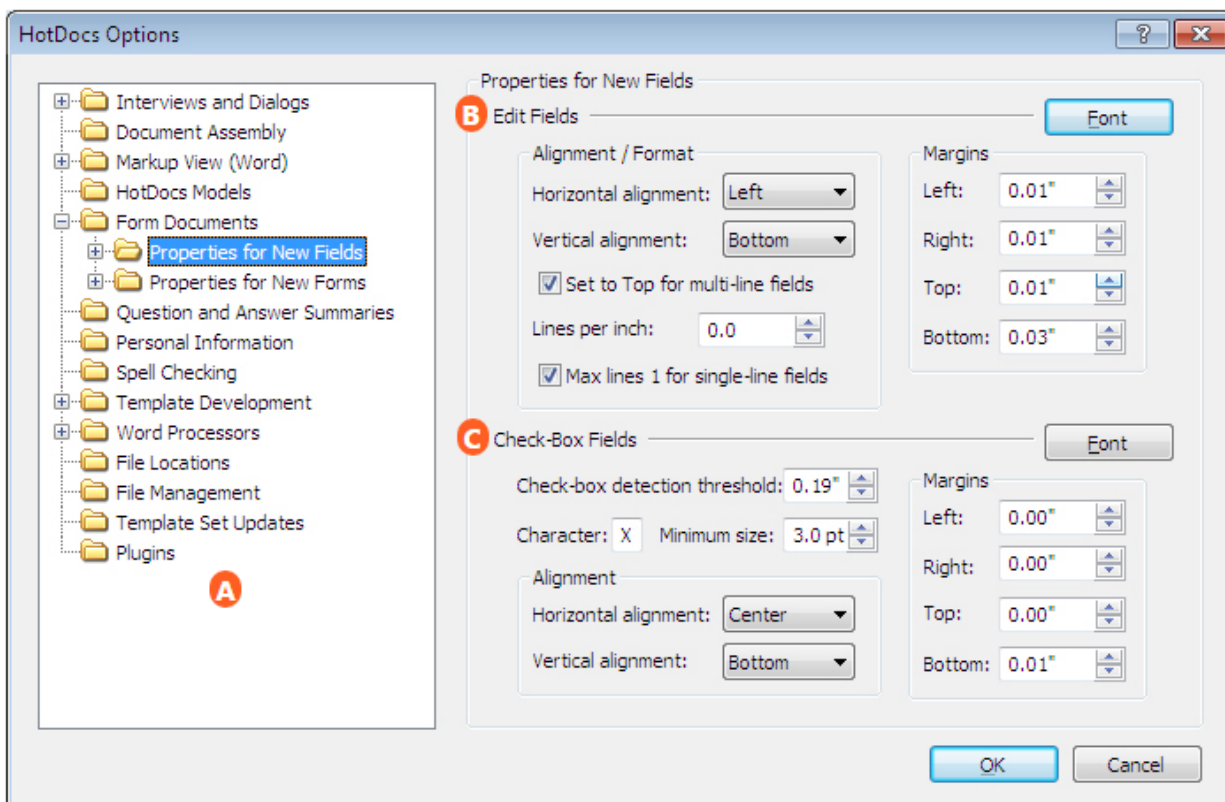
When you print an assembled PDF-based form document, you can choose the program that controls the printing process—either HotDocs or Adobe Acrobat.

To specify how PDF-based form documents should always be printed


1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Double-click the **Form Documents** folder. The folder expands to show several sub-folders, and the right pane changes to show several options for working with forms.
3. At the **Print PDF-based forms using** drop-down list, do one of the following:
 - Select **Always Ask** to have HotDocs prompt you for your choice each time you print a PDF form.
 - Select **HotDocs** to always print the assembled document using HotDocs' printing technology.
 - Select **Adobe Acrobat** to always print the document using Adobe's printing technology.

[Click here for tips on which printing option you should choose.](#)

At a Glance: Properties for New Fields (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you double click on **Form Documents** you will see a list open below containing a file for setting the options for the **Properties for New Fields** and the **Properties for New Forms**. Click on **Properties for New Fields** to bring up the **Properties for New Fields** dialog box.

There are two main sections on this dialog. The top section **B** allows you to set options for new edit fields. You can set the horizontal and vertical alignment of text within the field by selecting from the two drop-down menus on the left side of this section. Below this there are three further options for the field alignment and format. Check the first box to have HotDocs automatically set the vertical alignment to **Top** for multi-line fields, you can then set how many lines per inch you would like to type in the multi-line fields and check the box below to keep the maximum number of lines to 1 for single line fields. To the right of these options you can set the size of the border between the edge of the field and the text by entering measurements into the four fields. At the top right of this section you can set the font for new edit fields by clicking the **Font** button.

The second section in this dialog **C** allows you to set options for new check box fields. In the first number field you can set the field size below which HotDocs will automatically turn the field into a check box. Then you can choose what character HotDocs uses to check the field by typing it into the **Character** field and the minimum size that character can be. Below these options you can set the horizontal and vertical alignment of character within the field by selecting from the two drop-down menus. To the right of these options you can set the size of the border between the edge of the field and the text by entering measurements into the four fields. At the top right of this section you can set the font for new edit fields by clicking the **Font** button.

To find out more about setting options for New Fields follow the links below:

- [Set Properties for New Edit Fields](#)
- [Set Properties for New check box Fields](#)

Set Properties for New Edit Fields

You can specify the default properties that will be used each time you create an edit field in a HotDocs form. You can control font sizes, text alignment and spacing, and field margins.

To set the properties for all new edit fields

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.

2. Double-click the **Form Documents** folder. The folder expands to show several subfolders.
3. Open the **Properties for New Fields** folder. The window changes to show options that control how edit fields appear.
4. Make changes in the **Edit Fields** group, based on information in the following table:

To	Do This
Set font properties for text in edit fields	Click Font and make your changes at the Font dialog box.
Set the horizontal alignment for text in edit fields	At the Horizontal alignment drop-down list, select Left , Right , Center , or Justified .
Set the vertical alignment for text in edit fields	At the Vertical alignment drop-down list, select Left , Right , Center , or Justified . Vertical alignment is only apparent in multiple-line fields.
Align the text in multi-line fields with the top border of the field	Select Set to Top for multi-line fields .
Change the distance between lines of text in a multiple-line field	At the Lines per inch field, type a number (or click the up or down arrows to select a number).
Keep the user from manually entering multiple lines of text in a single-line answer field	Select Max lines 1 for single-line fields .
Changes the distance between the text and the edges of the field	At the Margins group, type a number (or click the up or down arrows to select a number) for the left, right, top, and bottom margins.


The changes you make are not applied to existing fields. The changes won't take effect until you create a new field. To change the appearance of existing edit fields, right-click on a field in the form and select **Field Properties** from the shortcut menu.

Some changes you make to these edit field properties may not affect specific fields because of settings assigned to these fields. For example, if the **Max Lines** setting for a field is set to 1, the **Lines per inch** property will have no effect—this property only affects multiple lines of text, but the **Max lines** setting limits the field to one line of text.

Set Properties for New check box Fields

When you create a field in a form document, HotDocs checks the size to see if it should be a check-box field. You can adjust the measurement that is used to distinguish check-box fields from edit fields. If a new field is identified as an edit field, HotDocs assigns standard formatting to the field that controls how answers appear in the field. You can also assign other default properties of a check-box field, such as assign the character that will be used when a field is selected, as well as set the alignment and margins of a field.

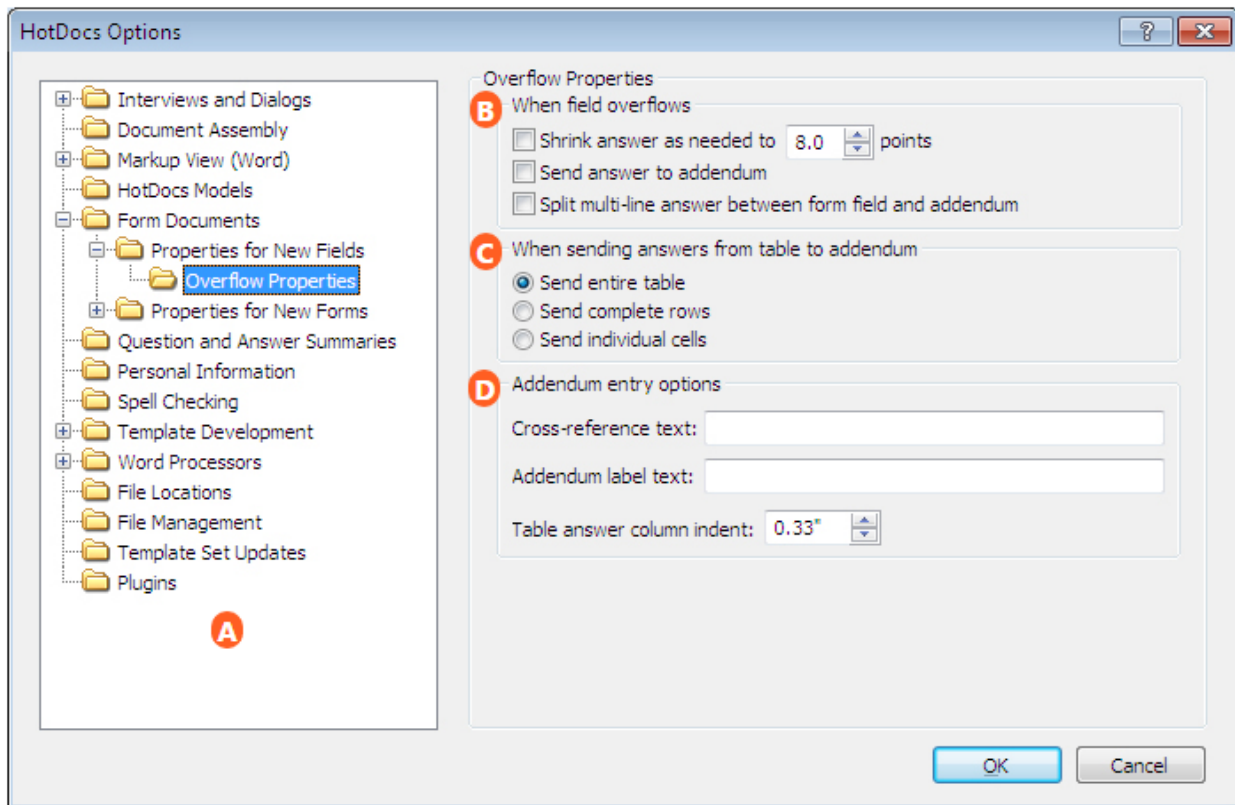
To set the properties for all new check box fields

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Double-click the **Form Documents** folder. The folder expands to show several subfolders.
3. Click the **Properties for New Fields** folder. The window changes to show field detection options that affect what kind of fields are created.
4. Make changes in the **check box Fields** group, based on information in the following table:


To	Do This
Set font properties for text in check box fields	Click the Font button, then make changes at the Font dialog box.
Sets the minimum size for edit fields so that all fields created smaller than this size will be created as check-box fields.	Enter a number in the Check-box detection threshold box. If you specify 0.00 as the value of this box, no new fields will be created as check-box fields.
Specify the character that will be inserted in a check box	Enter the character in the Character field.
Specify the smallest size that will be used for the check box character	Enter a font size in the Minimum size field.
Set the horizontal alignment for text in check-box fields	At the Horizontal alignment drop-down list, select Left , Right , Center , or Justified .
Set the vertical alignment for text in check-box fields	At the Vertical alignment drop-down list, select Left , Right , Center , or Justified .
Change the distance between the check box character and the edges of the field	At the Margins group, type a number (or click the up or down arrows to select a number) for the left, right, top, and bottom margins.

The changes you make are not applied to existing fields. The changes won't take effect until you create a new field. To change the appearance of existing check box fields, right-click on a field in the form and select **Properties** from the shortcut menu.

At a Glance: Overflow Properties (HotDocs Options)





Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you double click on **Form Documents** you will see a list open below containing a file for setting the options for the **Properties for New Fields** and the **Properties for New Forms**. Double click on **Properties for New Fields** to see **Overflow Properties** appear in a list item below. Click on **Overflow Properties** to bring up the **Overflow Properties Options** dialog box.

The top set of options **B** allow you to decide what will happen when a field overflows. You can choose to have HotDocs shrink the answer to the font size of your choosing (you can change this by entering a number into the points field), send the answer to an addendum sheet, and/or spilt multi-line answers between the form field and the addendum.

The next set of check boxes  allows you to choose what HotDocs will do when sending answers from a table to the addendum. If the table overflows, you can choose to send the entire table to the addendum, send complete overflow rows to the addendum, or send individual overflow cells to the addendum.

The last set of options on this dialog  allows you to set options for the Addendum entries. In the first text field you can enter the text you would like HotDocs to place on the form as a cross reference to overflow answers in the addendum. In the second text field you can enter the label you would like to appear in the addendum before an entry and in the number field below you can choose how much space you would like between the label and the entry.


To find out more about setting options for Overflow Properties follow the links below:

- [Set Rules for Handling Answer Overflow](#)
- [Specify Addendum References and Labels for Answer Overflow](#)

Set Rules for Handling Answer Overflow

An answer overflows when it takes more space than is available in the answer field of a form document. This often requires that some or all of the answer be sent to the addendum. You can set rules that automatically control what happens when answers overflow.

To control what happens when answers overflow

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Double-click the **Form Documents** folder. The folder expands to show several subfolders.
3. Open the **Properties for New Fields** folder, then select the **Overflow Properties** subfolder. The window changes to show options that control answer overflow.
4. Make selections for handling edit field overflow, based on the following options:
 - Select **Shrink answer as needed to** and then enter the point size in the **points** field. HotDocs will attempt to reduce the answer to this font size before warning of overflow.
 - Select **Send answer to addendum** to have HotDocs automatically resolve all overflow by sending answers to the addendum.
 - Select **Split multi-line answer between form field and addendum** to have HotDocs send only the part of the answer that overflows in a multi-line field to the addendum.
5. Make selections for handling table overflow, based on the following options:
 - Select **Send entire table** to send all answers in the table to the addendum.
 - Select **Send complete rows** to send answers from each row that contains a cell which overflows to the addendum.

- Select **Send individual cells** to send answers from individual cells that overflow to the addendum.

The changes you make are not applied to existing fields. The changes won't take effect until you create a new field.


You can customize the reference that appears in the overflowed answer field. This can help you determine where the answer is located in the addendum. (See [Specify Addendum References and Labels for Answer Overflow](#).)

You can remove the rules that automatically handle answer overflow by clearing these options. This will require you to manually resolve each instance of answer overflow.

Specify Addendum References and Labels for Answer Overflow

In a form document, when an answer overflows its answer field, the entire answer can be sent to an addendum. When this happens, HotDocs inserts text into the answer field, cross referencing you to the addendum for the full answer. You can specify what text is used in creating the cross reference as well as specify the text that identifies the answer once it has been sent to the addendum.

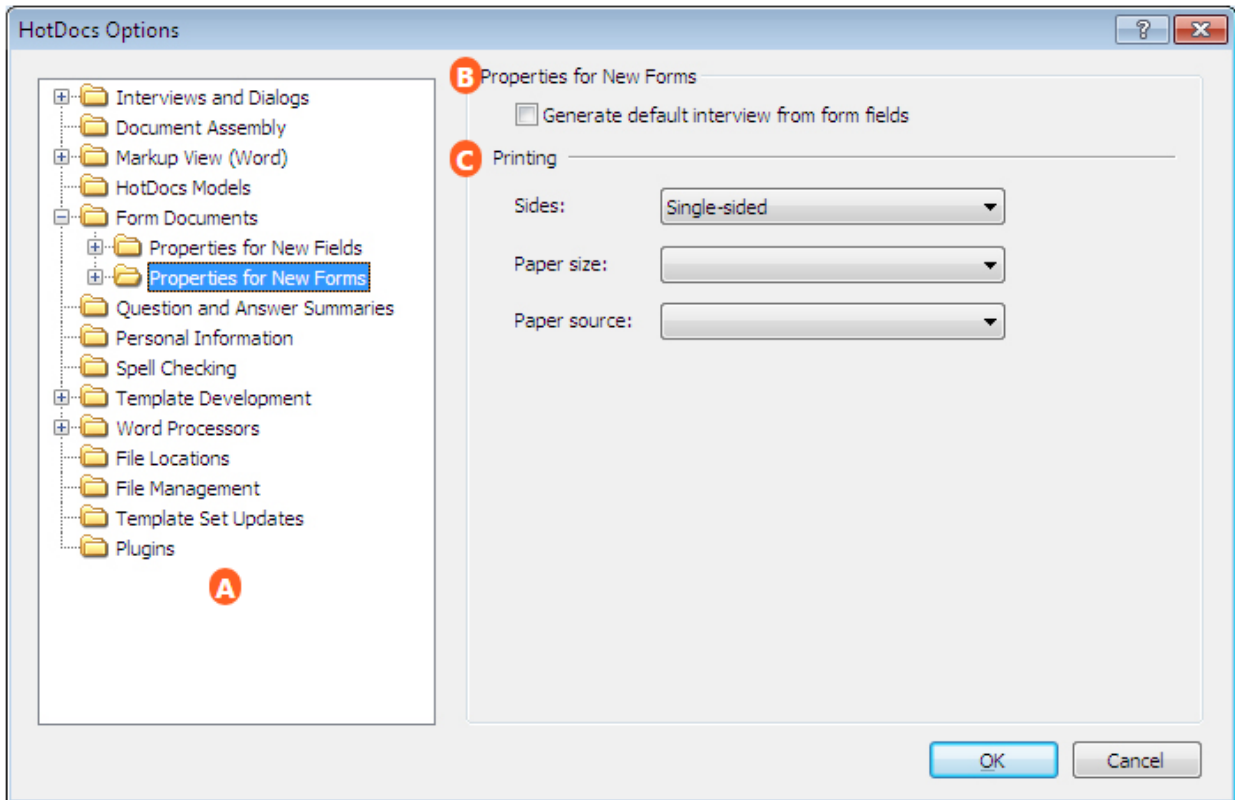
To control what information appears in overflow references and in the addendum

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Double-click the **Form Documents** folder. The folder expands to show several subfolders.
3. Open the **Properties for New Fields** folder, then select the **Overflow Properties** subfolder. The window changes to show options that control answer overflow.
4. In the **Cross-reference text** field, enter the cross-reference text you want to merge in the field if the answer overflows. (See [Use Answer Overflow and Addendum Text Codes](#).)
5. In the **Addendum label text** field, enter the text you want to appear as the label for the entry in the addendum.
6. At the **Table answer column indent** field, enter a number (or click the up or down arrows to select a number) to control the distance between the label for that specific entry in the list of answers and the actual answer.


The changes you make are not applied to existing fields. The changes won't take effect until you create a new field.

If you leave the **Cross-reference text** field empty, HotDocs uses a default reference, *See # in Addendum*.

At a Glance: Properties for New Forms (HotDocs Options)



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After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you double click on **Form Documents** you will see a list open below containing a file for setting the options for the **Properties for New Fields** and the **Properties for New Forms**. Click on **Properties for New Forms** to bring up the **Properties for New Forms** dialog box.

At the top of this dialog is a check box **B** that allows you to choose if you would like HotDocs to generate a default interview from form fields.

Below that are three drop-down menus **C** that allow you to set the printing options for new forms. Using the first drop-down list you can choose to print **Single-sided**, **Double-sided**, **side to side** or **Double-sided, top to bottom**. In the middle drop-down list you can select a default paper size from a long list of options and in the last drop-down list you can choose a default paper source from a list of options.


To find out more about setting options for New Forms follow the links below:

- Automatically Generate Default Interviews for Form Templates
- [Set Paper Size and Paper Source Defaults for Printing Forms](#)

Set Paper Size and Paper Source Defaults for Printing Forms

You can specify the paper size and paper source to be used when forms are printed.

To set paper size and paper source properties for a form

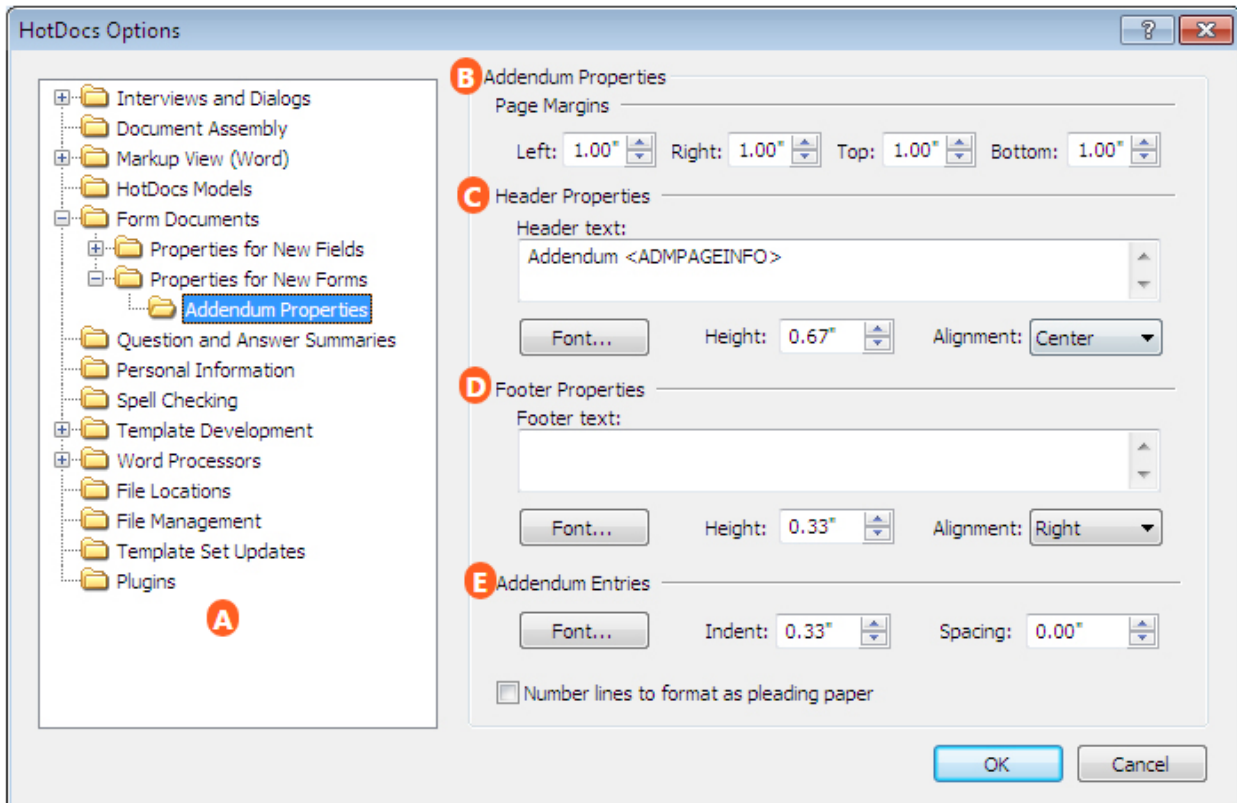
1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Double-click the **Form Documents** folder. The folder expands to show several subfolders.
3. Click the **Properties for New Forms** folder. The window changes to show options that control the properties of newly created forms.
4. At the **Sides** drop-down list, select one of the available options:
 - Choose **Single-sided** to print the form on one side of the paper.
 - Choose **Double-sided, side-to-side** to print the form on both sides of the paper, so consecutive pages read like a book.
 - Choose **Double-sided, top-to-bottom** to print the form on both sides of the paper, so consecutive pages read like a flip-chart.
5. At the **Paper Size** drop-down list, select one of the available options.
6. At the **Paper Source** drop-down list, select one of the available options.

Paper size and source settings are recommendations that will be passed on to the printer if possible. If printing via acrobat then paper size, paper source and duplex options will revert to your defaults.


The changes you make are not applied to existing templates. The changes won't take effect until you create a new template.

You can use command-line options to specify these printing properties. See the [Paper Tray and Paper Size](#) command-line options.

At a Glance: Addendum Properties (HotDocs Options)




Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.


After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you double click on **Form Documents** you will see a list open below containing a file for setting the options for the **Properties for New Fields** and the **Properties for New Forms**. Double click on **Properties for New Forms** to see **Addendum Properties** appear in a list item below. Click on **Addendum Properties** to bring up the **Addendum Properties Options** dialog box.

There are four sections of options you can set here to change how the generated addendum appears. At the top of the dialog **B** you can set the width of the page margins in the four number fields; **Left**, **Right**, **Top** and **Bottom**.

The next set of options **C** control how the addendum header will appear. In the large text field you can enter the text you would like to appear as the addendum header. Leave the field blank if you do not want a header. Below that there are three more options for the addendum header. You can select the font you would like the header to use by clicking the **Font...** button, you can select the height of the header by entering a number in the **Height** field and you can choose the alignment of the text from the **Alignment** drop-down list. You can choose from **Left**, **Center**, **Right** or **Justified**.

Below the header options are a set of options that control the appearance of the addendum footer . These are identical to the options for the addendum header but they control the text at the bottom of every page of the addendum. If you do not want a footer you can leave the text field blank.

The last set of options  on this dialog control the look of the addendum entries. You can choose the font you would like to use by clicking the **Font...** button, you can choose how much of an indent you would like between the label and the entry by entering a measurement in the central number field, and you can choose how much space you would like between sets of entries by entering a measurement in the right hand number field. Below these options there is a check box so you can decide if you would like to number the lines of entries to format the addendum as pleading paper.


To find out more about setting options for Addendum Properties follow the link below:

- [Customize the Appearance of Addenda](#)

Customize the Appearance of Addenda

You can format the form addendum to fit your project requirements.

To change the addendum's appearance

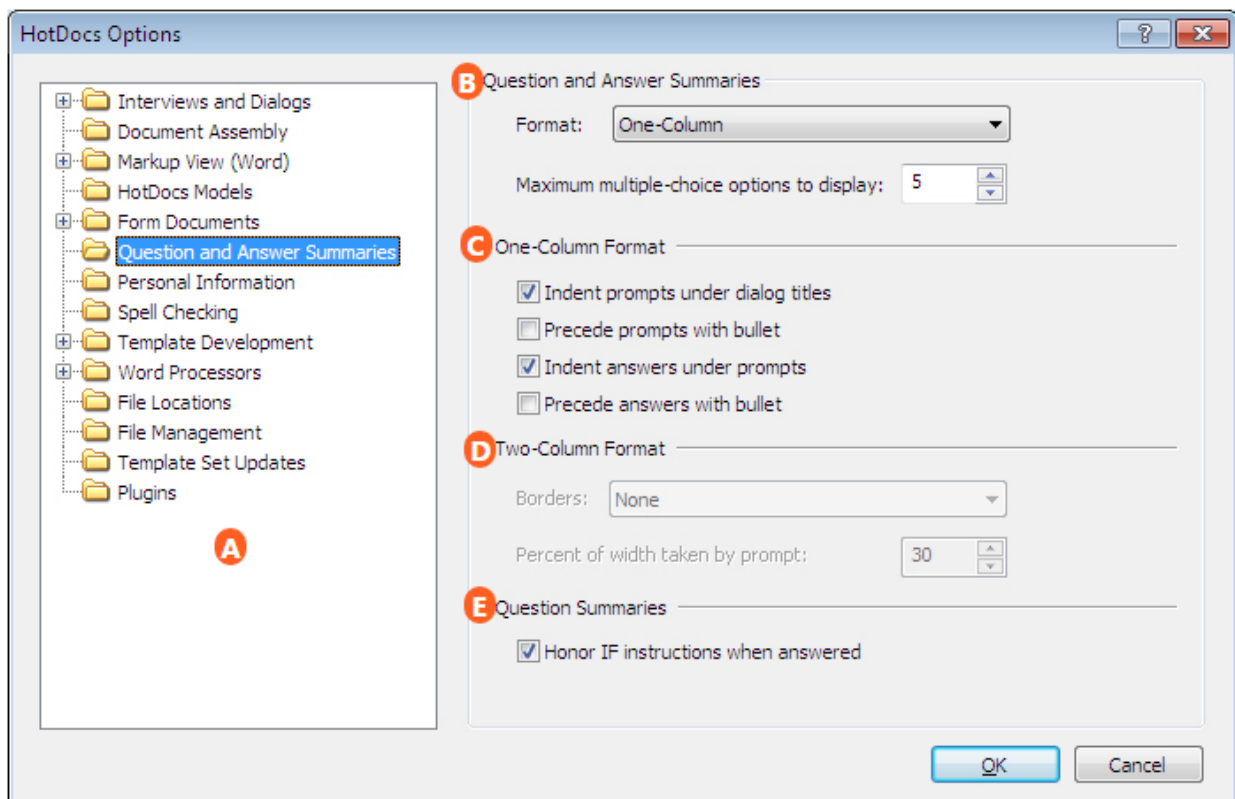
1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Double-click the **Form Documents** folder. The folder expands to show several subfolders.
3. Double-click the **Properties for New Forms** folder, then select the **Addendum Properties** subfolder. The window changes to show options that control the format of the addendum.
4. In the **Page Margins** group, enter margin widths (or click the up or down arrows to select a number). These numbers control the spacing between the answer text and the edges of the field.
5. In the **Header Properties** and **Footer Properties** groups, specify the header or footer text you want to appear in the addendum:
 - At the **Header text** or **Footer text** field, type the text you want displayed in the addendum header or footer. (See Use Answer Overflow and Addendum Text Codes.)
 - At the **Height** field, type a number (or click the up or down arrows to select a number). This number controls the vertical height of the header section.
 - Click **Font** to display the **Font** dialog box, where you can change font properties of the header text.
 - At the **Alignment** drop-down list, select one of the available options: **Left**, **Center**, **Right**, or **Justified**.
6. In the **Addendum Entries** group, make the following changes:
 - To change the font properties of the addendum entries, click **Font** to display the **Font** dialog box.

- To control the distance between the label and the actual answer, enter a number (or click the up or down arrows to select a number) in the **Indent** field.
 - To control the distance between answer tables in the addendum, enter a number (or click the up or down arrows to select a number) in the **Spacing** field.
7. Select **Number lines to format as pleading paper** to place lines on the right and left side of the addendum, with numbers along the entire left edge.


The changes you make are not applied to existing forms. The changes won't take effect until you create a new template.

Question and Answer Summaries

At a Glance: Question and Answer Summaries (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you click on **Question and Answer Summaries** you will see the **Question and Answer Summaries Options** dialog box, from here you can set options to decide how question and answer summaries are asked and displayed.

In the first section of options **B** you can choose the format for Question and Answer Summaries in a drop-down list. If you select **One Column Format** then the next section of options **C** becomes available and the third section **D** is grayed out. If you select **Two Column Format** the second section **C** will be grayed out and the third section **D** will become available. The other option in the first section **B** allows you to decide the maximum number of multiple choice options that will be displayed.

If you have chosen **One Column Format** in the first section **B** of the options then the four check boxes **C** allow you to further customize the look of the summaries. Here you can choose to indent the prompts displayed under dialog titles, precede the prompts with a bullet point, indent answers under prompts and precede answers with a bullet point.

If you have chosen **Two Column Format** in the first section **B** of the options then the drop-down list and number field **D** allow you set more options for your summaries. In the drop-down list you can choose how you would like the column borders to look. The choices are **None**, **Plain** or **Sculptured**. In the number field you can set the percentage of column width you would like taken up by the prompt.

The last option on the dialog **E** is a check box that allows you to decide whether you would like HotDocs to honor IF instructions in question summaries when they're answered.

To find out more about setting options for Question and Answer Summaries follow the links below:

- [Change the Way Question and Answer Summaries Appear](#)
- [Control Which Variables are Asked in a Question Summary](#)


Change the Way Question and Answer Summaries Appear

In question and answer summaries, you can specify a one-column or a two-column format:

- The one-column format displays a simple list of variable prompts and answers (if you're generating an answer summary) or empty answer fields (if you're generating a question summary). Prompts and answers are grouped by dialogs. To make these summaries easier to read, you can indent these lists or use bullets.
- The two-column format displays a list of variable prompts in one column and their associated answers (if you're generating an answer summary) or empty answer fields (if you're generating a

question summary) in a second column. Prompts and answers are grouped by dialogs. You can control the appearance of these columns by specifying borders and choosing the width of the column that contains the prompt.

To format question or answer summaries

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Question and Answer Summaries** folder. The right pane changes to show the summary options.
3. If you want the summary to appear in one-column format, click the **Format** drop-down button, choose **One-Column**, and select from the following options:
 - Select **Indent prompts under dialog titles** to include a tab between the column's margin and the prompt. Selecting this option makes the dialog titles and variable prompts appear hierarchical.
 - Select **Precede prompts with bullet** to insert a bullet character next to each prompt.
 - Select **Indent answers under prompts** to include a tab between the column's margin and the answer. Selecting this option makes the prompts and the answers appear hierarchical.
 - Select **Precede answers with bullet** to insert a bullet character next to each answer.
4. If you want the summary to appear in two-column format, click the **Format** drop-down button, choose **Two-Column**, and select from the following options:
 - Select a border style from the **Borders** drop-down list. Your options include **None**, **Plain**, and **Sculptured**.
 - Specify a percentage in the **Percent of width taken by prompt** field. This percentage determines how much of the viewable window is used to display the prompt. You can change this number by clicking the up or down arrows, or by typing a number directly in the field.
5. Optionally, change the number in the **Maximum multiple-choice options to display** field to control the number of multiple-choice options that appear in a question or answer summary.


Control Which Variables are Asked in a Question Summary

Typically question summaries include all questions in a template. However, some questions may not be asked unless certain conditions are met or certain answers are entered. These kinds of questions are called conditional variables. You can limit question summaries so they show only the questions that are applicable, based on certain answers you provide.

An example of a conditional variable might be the section of an employee agreement template that deals with employee benefits. Questions relating to employee benefits are asked only if the employee qualifies

for benefits. If you assemble a question summary for an employee who does not meet the conditions, the benefits questions should not appear in the summary.

To control conditional variables in a question summary

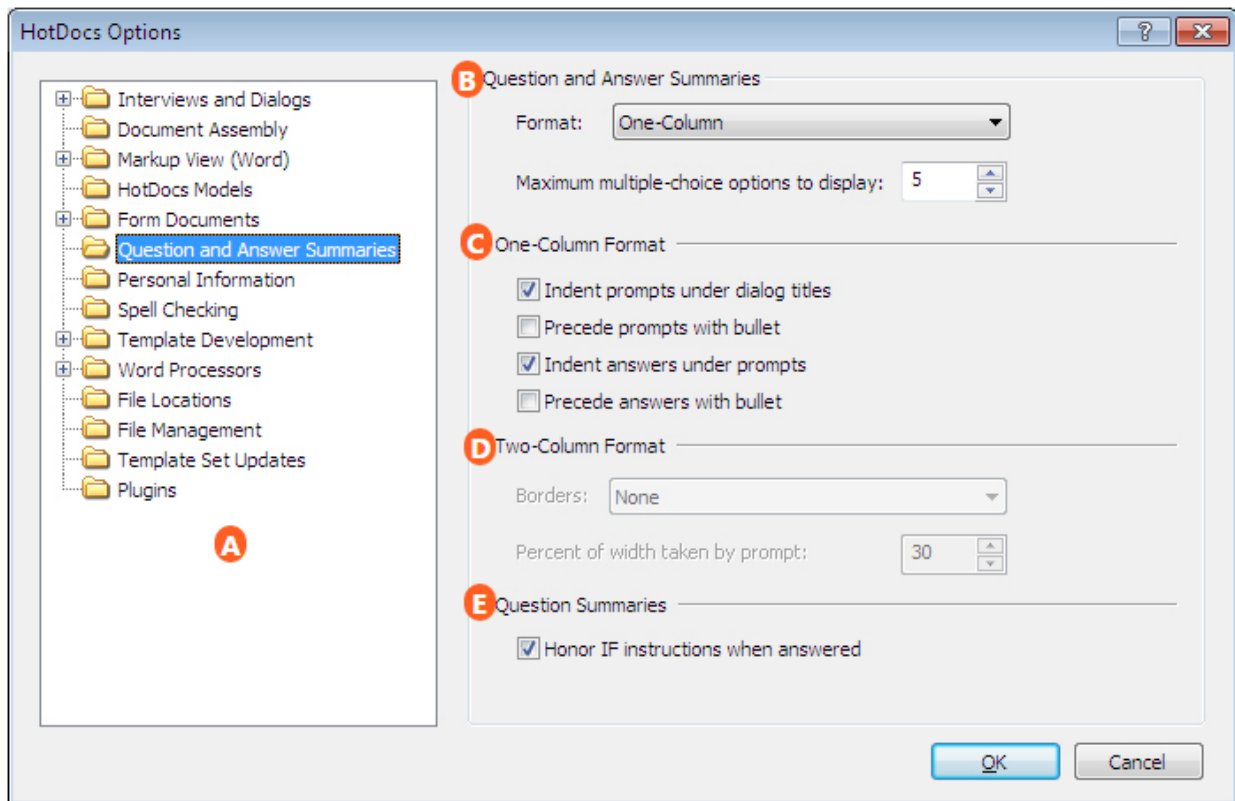
1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Question and Answer Summaries** folder. The window changes to show several summary options.
3. In the **Question Summaries** group, select **Honor IF instructions when answered**.

This setting will take effect when you assemble a document, answer the conditional variables, and then view the question summary.


To once again generate a question summary that shows all the document questions, clear **Honor IF instructions when answered**.

Personal Information

At a Glance: Personal Information (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

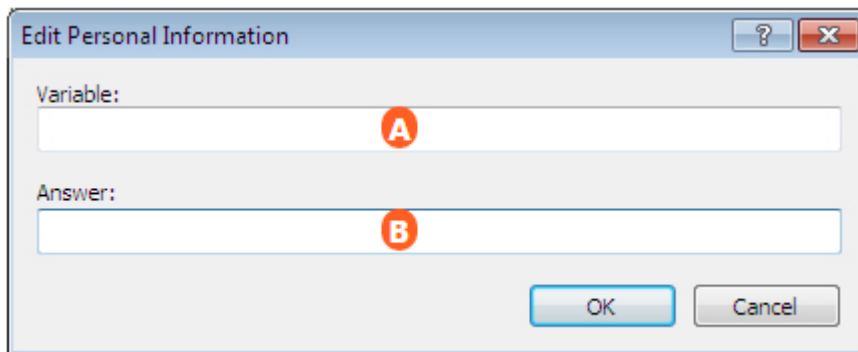
If you click on **Personal Information** you will see the **Personal Information Options** dialog box, from here you can enter details that HotDocs will save as personal information that can be used in the script editor and in templates as Personal Information Variables.

The large field **B** on this dialog contains a list of Personal Information variables and their answers. Using the buttons below **C** you can **Edit** existing Personal Information variables, **Add** new ones and **Delete** Personal Information variables that are no longer useful.


To find out more about setting options for Personal Information follow the links below:

- [Create Personal Information Variables](#)
- [At a Glance: The Add/Edit Personal Information Dialog Box](#)
- [Edit Answers for Built-In Personal Information Variables](#)

At a Glance: The Add/Edit Personal Information Dialog Box



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages. If you click on **Personal Information** you will see the **Personal Information Options** dialog box, from here you can see the details that HotDocs has saved as personal information that can be used in the script editor and in templates as Personal Information Variables. Click the **Add** button, or click on any one of these items and then click the **Edit** button, to display the **Add/Edit Personal Information Dialog Box**.

In the first field **A** you can enter the name of the Personal Information variable you are creating or editing and in the second field **B** you can enter the answer you want assigned to the Personal Information variable. This answer is stored in the system registry. Once given, you will not be prompted to enter it again.

To find out more about editing Personal Information follow the links below:

- [Edit Answers for Built-In Personal Information Variables](#)

Edit Answers for Built-In Personal Information Variables


Personal Information variables gather basic information, such as your name, company, and phone number. This information is stored in the Current User section of the system registry so it can be used in assembled documents without you having to re-enter it.

When you assemble a document using a template that has Personal Information variables, HotDocs asks for any personal information required by the template that you haven't already entered. If you want to

specify this information before document assembly, however, or if you want to change existing answers, you can do this at the HotDocs Options dialog box.

Because built-in variables are shared between all users of your workstation, you cannot delete the variable. You can, however, remove any personal information that has been entered for it.

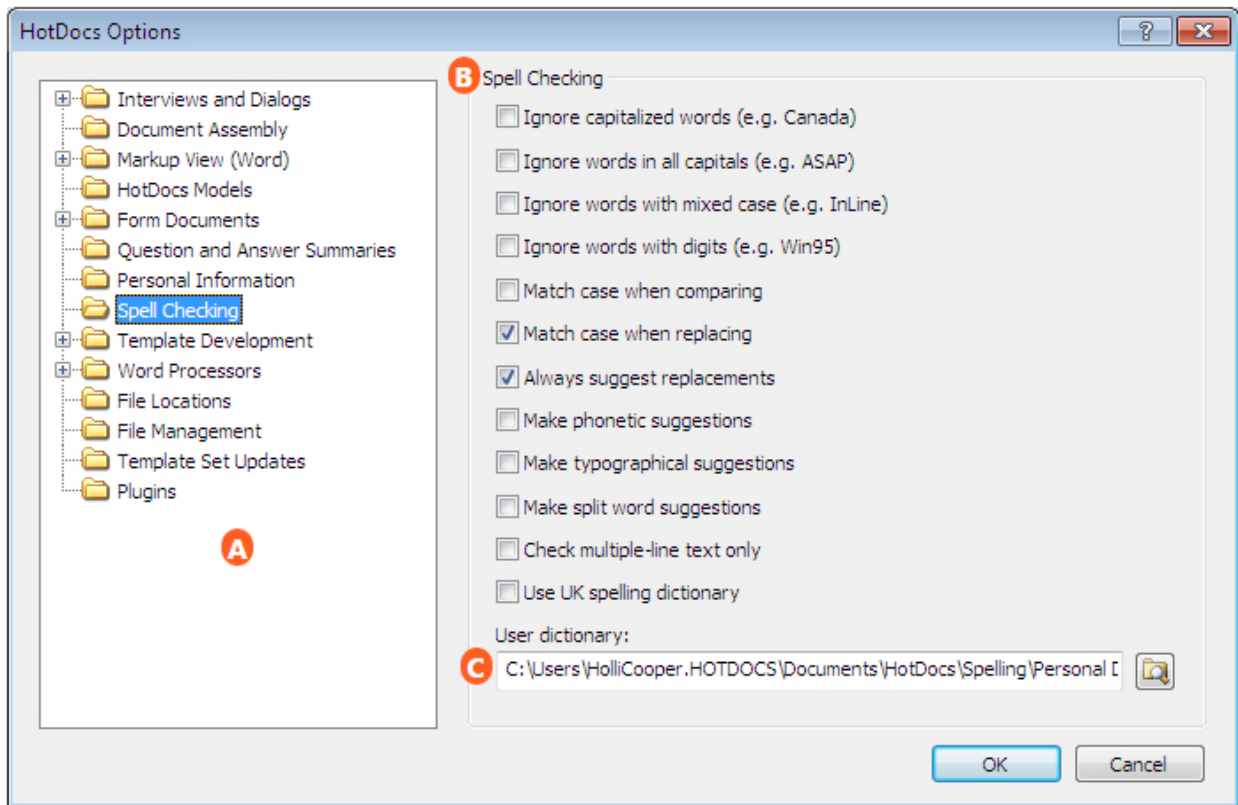
To edit answers for Personal Information variables

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Personal Information** folder. The right pane changes to show several Personal Information variables.
3. Select the variable you want to modify and click **Edit**. The **Edit Personal Information** dialog box appears.
4. Enter an answer in the **Answer field** and click **OK**. The value is now listed in the **Answer** column.


To remove an answer for a Personal Information variable, select the variable that contains the answer and click **Delete**. Click **Yes** to confirm the deletion.

Spell Checking

At a Glance: Spell Checking (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.



After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you click on **Spell Checking** you will see the **Spell Checking Options** dialog box, from here you can set the options for spell checking in HotDocs and specify your user dictionary.

There are 12 check boxes **B** on this dialog to set the spell checking options in HotDocs. You can choose to check or uncheck any of the following:

- Spell check will ignore capitalized words
- Spell check will ignore words in all capitals
- Spell check will ignore words with mixed upper and lower case letters
- Spell check will ignore words with digits
- Spell check will match the case of the unrecognized word when comparing
- Spell check will match the case of the unrecognized word when replacing
- Spell check will always suggest replacement words
- Spell check will make phonetic suggestions for unrecognized words
- Spell check will make typographical suggestions for unrecognized words

- Spell check will make split word suggestions for unrecognized words
- Spell check will only check multiple-line text
- Spell check will use the UK spelling dictionary

Below the check box options you can choose to change your default **User Dictionary** . Using the  **Browse** button to the right of the field you can navigate to a different dictionary file on your computer.

To find out more about setting options for Spell checking follow the link below:


- [Change Your Spell Checking Options](#)

Change Your Spell Checking Options

HotDocs can spell check answers entered during an interview.

As HotDocs spell checks, it looks at the spell checking settings stored in the HotDocs section of the system registry to determine what words the spell checker looks at and how it decides on words to suggest as possible alternatives to words not in the dictionary. You can change these settings.

To change your spell checking options

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Spell Checking** folder. The contents of the window change to show your spell checking options.
3. Select appropriate options, as described in the following table:

To	Do This
Cause HotDocs to ignore capitalized words, such as names, cities, titles, and so on	Select Ignore capitalized words (e.g. Canada) .
Cause HotDocs to ignore words that contain all capital letters, such as acronyms or abbreviations	Select Ignore words in all capitals (e.g. ASAP) .
Cause HotDocs to ignore words that contain both uppercase and lowercase letters	Select Ignore words with mixed case (e.g. InLine) .
Cause HotDocs to ignore words that also contain digits	Select Ignore words with digits (e.g. Win95) .
Cause the replacement words HotDocs suggests to match the case of the misspelled word	Select Match case when comparing .

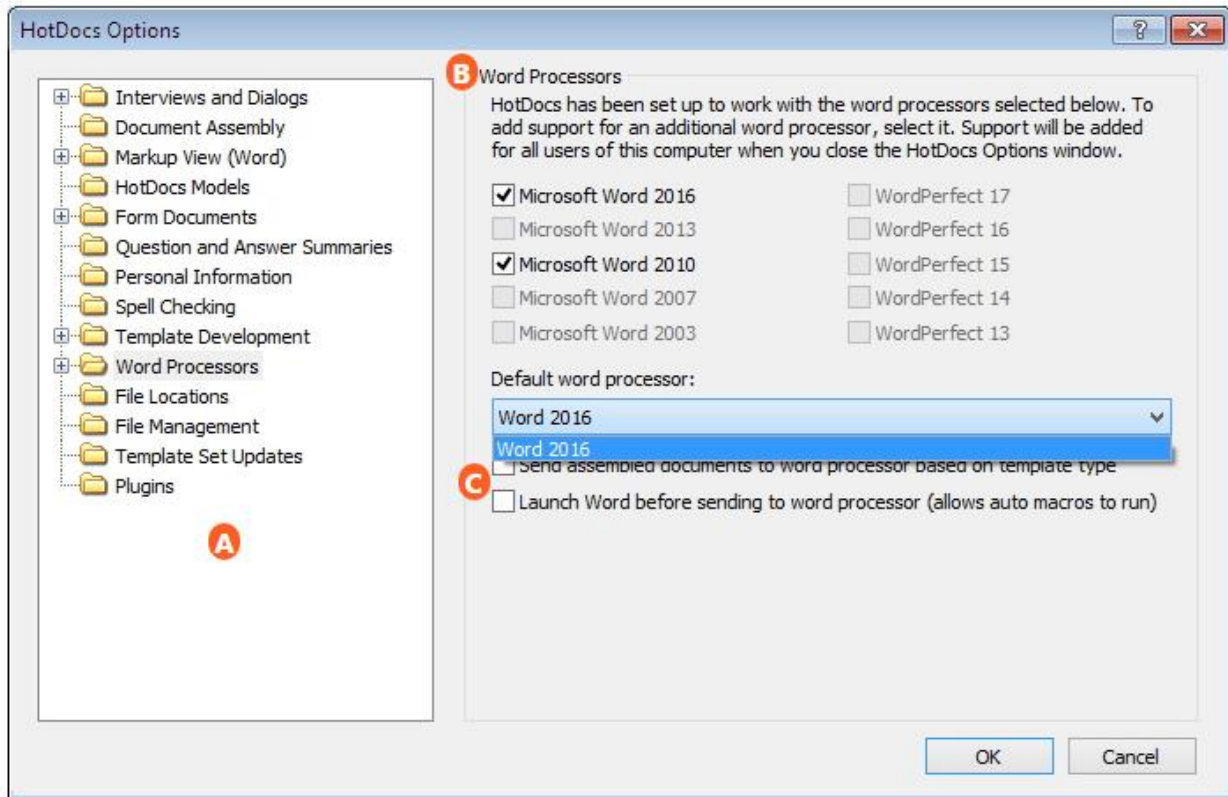
Cause HotDocs to match the case of misspelled words when replacing them	Select Match case when replacing .
Cause HotDocs to provide a list of possible replacements for misspelled words	Select Always suggest replacements .
Cause HotDocs to provide a list of possible replacements based on words that sound like the misspelled word	Select Make phonetic suggestions .
Cause HotDocs to provide a list of possible replacements based on words that are typographically similar	Select Make typographical suggestions .
Cause HotDocs to provide a list of possible replacements that are made up of more than one word	Select Make split word suggestions .
Cause HotDocs to check the spelling only if the text is more than 1 line	Select Check multiple-line text only .
Cause HotDocs to use the British spelling dictionary rather than the English dictionary	Select Use UK spelling dictionary .

When a word is not in the spelling checker's dictionary, HotDocs checks for it in your personal dictionary, *Personal Dictionary.TLX*. If it is not found there, you can add it by clicking **Add** at the **Check Spelling** dialog box.


You can change these settings whenever you are spell checking. To do this, click **Options** at the **Check Spelling** dialog box.

Word Processors

At a Glance: Word Processors (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you select **Word Processors** you will see the **Word Processors Options** dialog box. From here you can change what word processors HotDocs supports and choose your default word processor.

The two lists of word processors at the top of the form **B** display all the word processors that HotDocs can support. HotDocs identifies which word processors you have installed on your computer and ungrays those word processors only. Any word processors already displaying a check are already supported. If you check an empty box next to any of the ungrayed options then these are supported once you close the **Options** dialog box.

The drop-down arrow **C** below these lists enables you to select a default word processor from your supported word processors.

While you can choose any version of WordPerfect as the default version HotDocs uses to create a new WordPerfect template, for Word, you are limited to selecting the latest version of Word installed on your machine as the default version HotDocs uses to create new Word templates.

Using the check box options below the drop-down, you can choose to **Send assembled documents to the word processor** that matches their template type (useful if you have both Microsoft Word and WordPerfect installed) and choose to **Launch word before sending a document to the word processor** (to allow Word Macros to run).

To find out more about setting options for Word Processors follow the links below:


- [Install Support for New Word Processors](#)
- [Change Your Default Word Processor](#)

Install Support for New Word Processors

Before installing support for a new word processor, make sure you run the newly installed word processor program at least once. This creates entries for the new word processor in the Windows System Registry that HotDocs needs to properly integrate with the word processor.

When you install a new word processor and you want to use it with HotDocs, you can install support for it through HotDocs Options. If multiple users use the workstation, support for the word processor will be installed for them as well.

To install new word processor support

1. Install the new word processor and run it at least once.
2. Start HotDocs. (See Start HotDocs.)
3. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
4. Click the **Word Processors** folder. The right pane changes to show a list of word processors which HotDocs supports. (Word processors for which you have already installed support are selected, while word processors that are not installed are disabled.)
5. Select the word processor for which you want to install support.
6. Click **OK**. The **HotDocs Options** dialog box closes.

Once you close the HotDocs Options dialog box, HotDocs runs the Current User Setup, which copies the required files to the correct program folders. (See Understand HotDocs Installation.)

[Click here to see a list of which word processors are supported for this release.](#)


[To make the newly installed word processor the default word processor, you must manually select it after you install support for it. See Change Your Default Word Processor for details.](#)

[You may need to restart the word processor to add the correct HotDocs buttons and toolbars to it.](#)

Change Your Default Word Processor

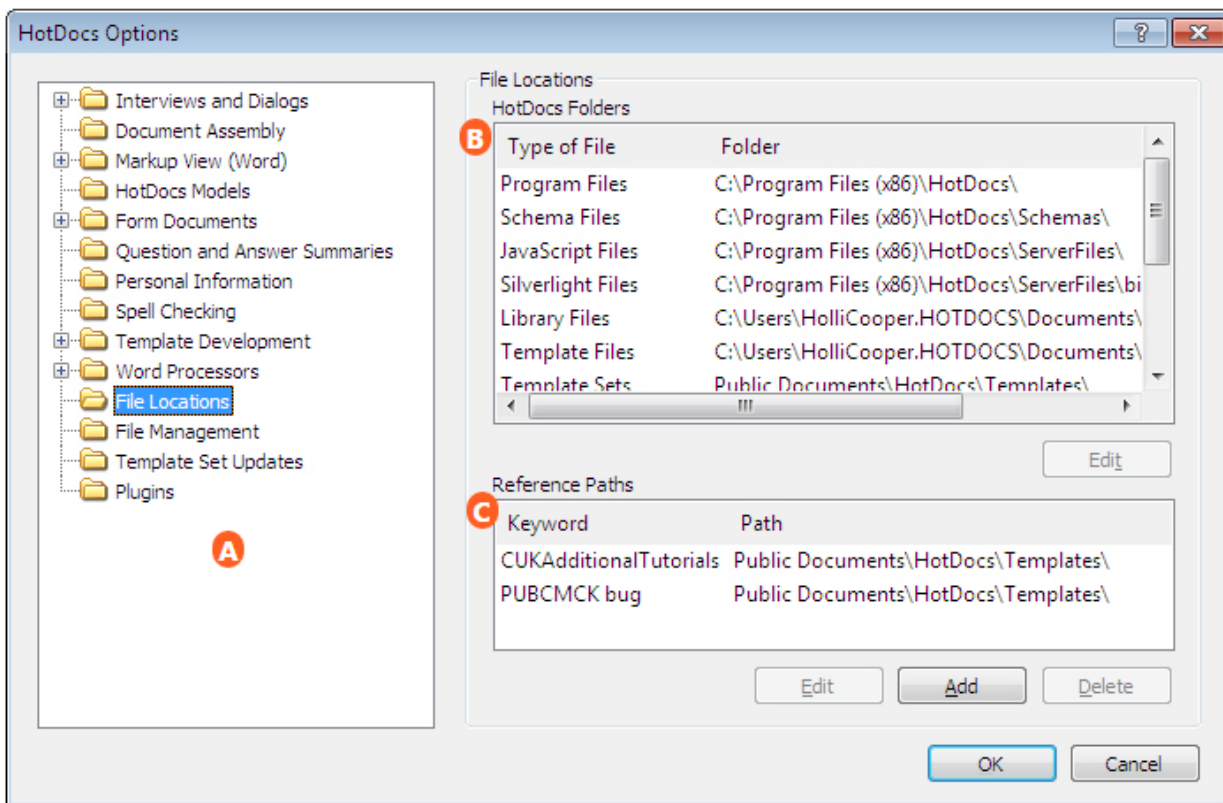
If you have both Microsoft Word and WordPerfect installed for HotDocs, you must choose which word processor HotDocs should use as the default. The default word processor determines which word processor will be opened when you finish the interview and send the assembled document to it.

To specify a default word processor

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Word Processors** folder. The right pane changes to show supported word processors.
3. Click the **Default word processor** drop-down button and select a word processor.
4. Optionally, to send assembled documents to the word processor that matches the template file type, select **Send assembled documents to word processor based on template type**.
5. Optionally, to start Word before you send the assembled document to it, select **Launch Word before sending to word processor (allows auto macros to run)**. (This is useful if the underlying template uses AutoExec or AutoOpen macros, since HotDocs explicitly disables the execution of Auto macros in Word before it sends a document to Word after assembly.)

[Click here to see a list of which word processors are supported for this release.](#)

At a Glance: Word Processor File Locations (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you double click on **Word Processors** you will see a list open below containing a file for each of your supported word processors. Click on one to bring up the **Word Processor File Locations** dialog box for that particular word processor, from here you can [change the default file locations](#) for that word processor.


From here you can edit three file locations for the selected word processor. In the first field **B** you can change the default documents folder by clicking on the **Browse** button next to it and navigating to the folder you need. In the second field **C** you can change the default folder that HotDocs stores and looks for templates. In the third field **D** you can change the startup folder for the chosen word processor.

To find out more about setting options for Word Processors File Locations follow the link below:

- [Change Word Processor File Locations](#)



Change Word Processor File Locations

By default, HotDocs uses certain folders that were specified during installation to store text templates and assembled text document files that are used with HotDocs. These folder names and file paths become the default location HotDocs looks when no specific path is assigned at the file's properties.

At the library, you can check whether a full path is given by selecting the template and clicking the  **Properties** button. If a full path is given, HotDocs uses that information when accessing the file. Otherwise, HotDocs uses the default file location specified here.

You can change the locations HotDocs looks for these files.

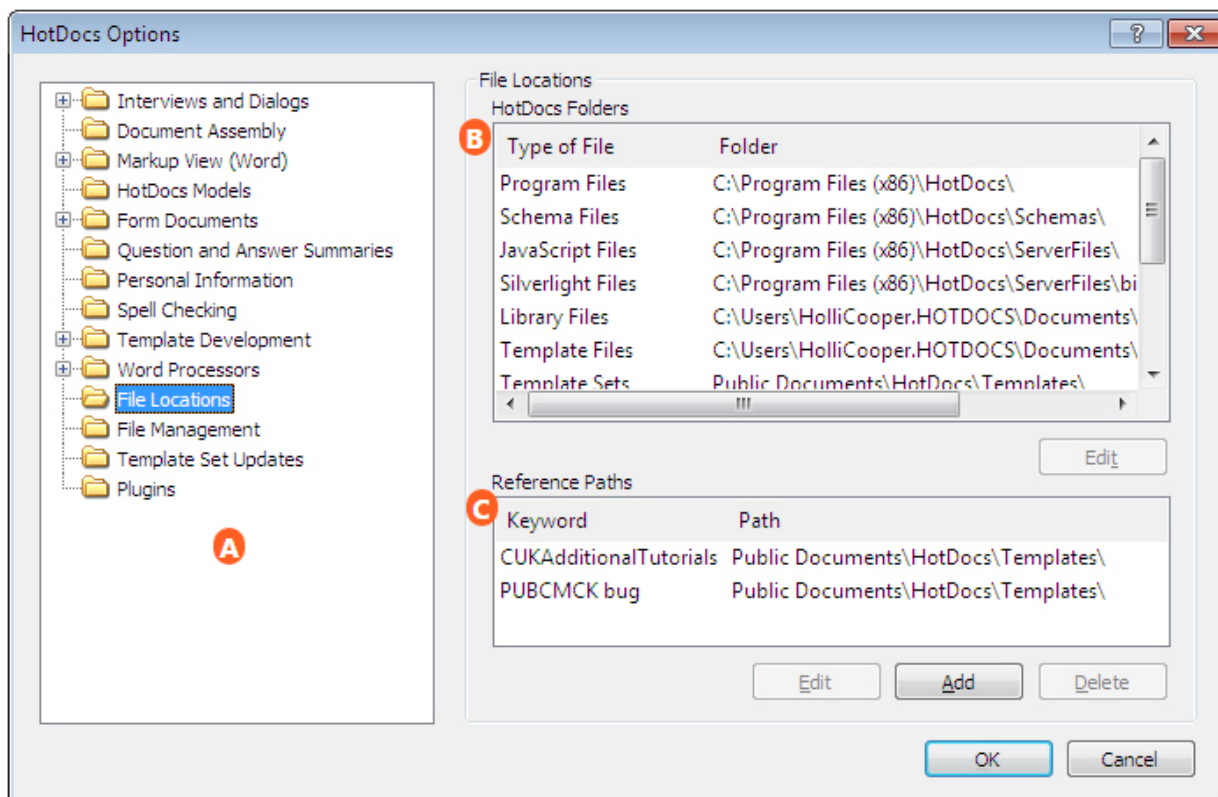
To change the location of word processor files

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Double-click the **Word Processors** folder so that it expands to show subfolders for each word processor that is installed.
3. Click the word processor folder for which you want to make changes. The right pane changes to show the different file locations of the document, template, and startup files (or macro files for WordPerfect users).
4. For each file location you want to change, click the  **Browse** button next to the file location path and navigate to the new location.


If templates in your library use the default file path for its templates, you must move your templates to this new location or HotDocs will not be able to find them. See [Move Items to New Locations on Disk](#).

File Locations

At a Glance: File Locations (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you select **File Locations** you will see the **File Locations Options** dialog box. From here you can [change where HotDocs stores saved files](#) and you can edit the [assigned reference paths](#) of HotDocs Libraries.

From this folder, you can change the locations of the following file types: ANX, CMP, HDI, HDL, HDP, HFD, HFT, HPD, HPT, PDF, TTX. You [change text file locations](#) from the Word Processors folder just above the File Locations folder.

In the first list **B** you can see the locations of all the HotDocs folders. By selecting a folder from this list and clicking the **Edit** button below the list you can change where HotDocs will automatically save those files.


In the second list **C** you can see the file paths of your HotDocs libraries. By selecting a library from this list and clicking the **Edit** button below the list you can change where HotDocs will automatically save those files. You can also click **Add** to add a new library file path to the list.

To find out more about setting options for file locations follow the links below:

- [Change HotDocs Program File Locations](#)
- [Assign Reference Paths to HotDocs Files](#)
- [At a Glance: Word Processors \(HotDocs Options\)](#)

Change HotDocs Program File Locations


When you install and use HotDocs, the program makes several entries in the [System Registry](#) that indicate to HotDocs where to look for files, as well as where to suggest you save files. (See [Understand HotDocs Installation](#).) In most situations, HotDocs uses this information each time you perform a task in HotDocs. If you ever need to change these default locations, you can do so at HotDocs Options.

If a full path is specified for the file you are attempting to access, that file path will be used, rather than the default file path. (To check whether a full path is given, select the item and click the  **Properties** button.)

You can change the default location HotDocs looks for the following files:

- Library files (HDL files).
- Template files (HFT, HPT, and CMP files). (To change the default location for text templates, see [Change Word Processor File Locations](#).)
- Template Sets (installed HDI files).
- Catalog Files (files used to keep published template sets up to date).
- Answer files (ANX files).
- Form document files (HFD, HPD, and PDF files).

To change the default location of HotDocs files

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **File Locations** folder. The window changes to show a listing of the different HotDocs file paths.
3. In the **HotDocs Folders** group, select a file type and click **Edit**. The **Browse for Folder** dialog box appears.
4. Browse to the new location and click **OK**. HotDocs will use this location as the new default.

You must restart HotDocs for these changes to take effect.

Assign Reference Paths to HotDocs Files

A HotDocs library will work only if each template listed in the library is located in the exact path specified in the **Item Properties** dialog box for that template. This makes it difficult to create a library that will work for multiple users who will not store the templates in the same locations. A reference path lets you create a library that will work, regardless of where users store their templates.

A reference path is a folder path for a template in which the drive letter and some or all of the folder names have been replaced with a caret (^) and a keyword. The keyword is associated with an actual folder path in the user's HotDocs settings. When HotDocs needs to open a template, it replaces the caret and keyword in the folder path for the template with the folder path that is associated with the keyword in the user's HotDocs Options.



Some common uses of reference paths are:

- With distributed template sets which allow users to choose where they install the templates (even if they can only choose the drive to which the templates are installed).
- With templates located on a network drive that is mapped to a different letter for some of the users.


In order for your library to work for users regardless of where they store the templates, you need to enter a reference path for all templates and clause libraries in the library. You should use the same keyword for all the items in the library.

If you know the library items won't all be stored in the same subfolders, use the keyword only in place of the part of the path that is identical for all items. For example, if some of the templates will be stored in a *General* subfolder and others will be stored in a *Family Law* subfolder, you would use the reference path **^keyword\General\template.ext** for those templates in the *General* subfolder and **^keyword\Family Law\template.ext** for those templates in the *Family Law* subfolder (where *keyword* is a placeholder for the keyword you use and *template.ext* is a placeholder for the file name and extension of the template).

To associate a keyword with a path and assign the reference path

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **File Locations** folder. The window changes to show a listing of the different HotDocs file paths.
3. In the **Reference Paths** section, click **Add**. The **Add/Edit Reference Path** dialog box appears.
4. Type a keyword for the reference path in the **Keyword** field.
5. Click the  **Browse** button next to the **Path** field, and specify the path to the subfolder you want to use.
6. Click **OK**.

Once you have designated the keywords and paths that HotDocs needs to know about your files, you can assign reference paths to the templates. (These templates must be saved to the subfolder you specified in Step 5, above.)

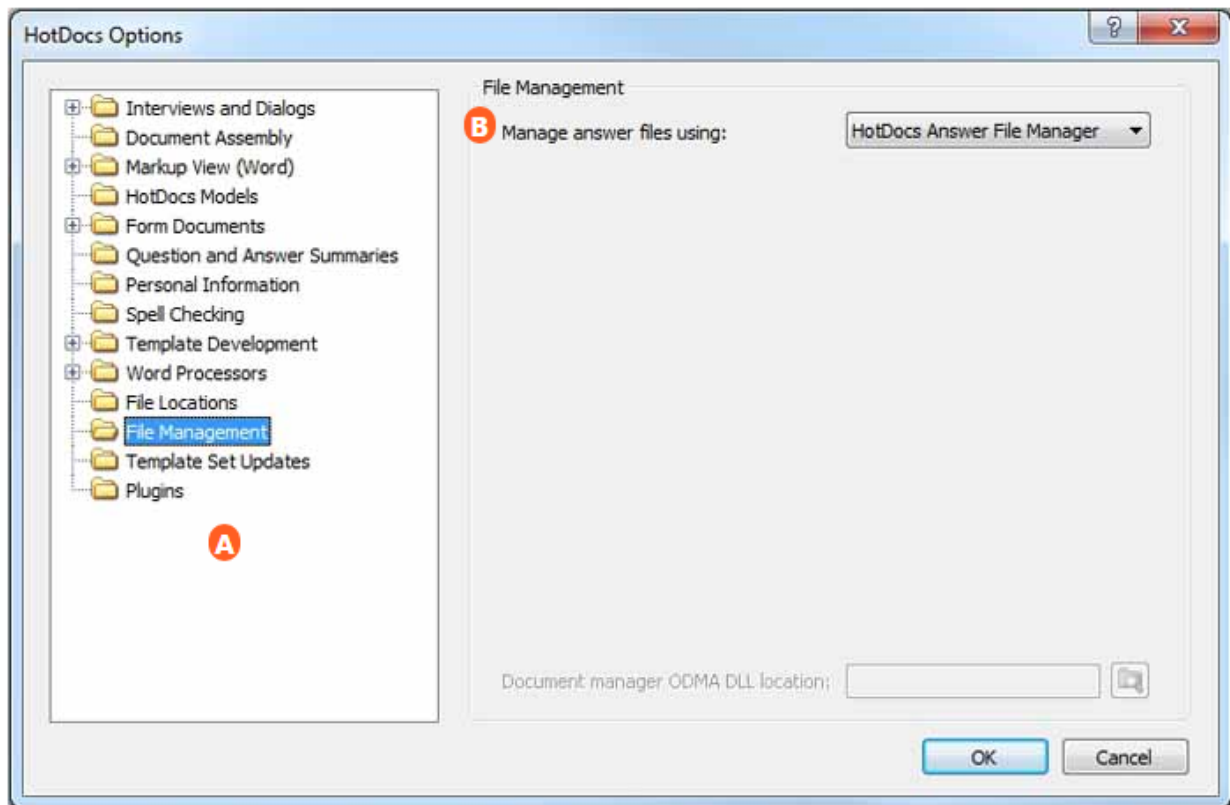
7. At the HotDocs library window, select the template for which you want to specify a reference path and click the  **Properties** button. The **Item Properties** dialog box appears.
8. If the **File name** field contains a folder path as well as a file name, delete the part of the path that is the same for all items in the library.
9. Place your cursor before the first letter in the **File name** field and type caret (^), the keyword, and a backslash (\).
10. Click **OK**.

When publishing your template set as an auto-install (.HDI) file, HotDocs automatically creates the reference paths and enters the correct information in the user's HotDocs settings during installation.


For instructions on assigning reference paths to multiple library items, see [Change the Properties for Multiple Items in a Library](#).

File Management

At a Glance: File Management (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you select **File Management** you will see the **File Management Options** dialog box. From here you can change how HotDocs manages answer files and assembled documents.

The first option **B** allows you to choose how you would like to manage your answer files. You can choose from:

- HotDocs Answer File Manager
- Windows Explorer

To find out more about setting options for file management follow the links below:


- [Manage Answer Files](#)
- [Manage Assembled Document Files](#)

Manage Answer Files

To work with answer files, you can either use Answer File Manager, or you can use Windows Explorer. (See [Introduction: Use Answer Management](#).) Answer File Manager uses an answer library (.HAL) file to create, store, and select answer files. Windows Explorer allows you to work with answer files using the common **File > Open** or **File > Save** dialog boxes.

Which option you choose depends on your preference. For example, Answer File Manager works well if you are the only user and you like the functionality available with a library. However, Windows Explorer makes more sense for managing answer files in a multi-user setting. Windows Explorer also lets you see more clearly where the actual answer files are saved.

To change how HotDocs locates and manages answer files

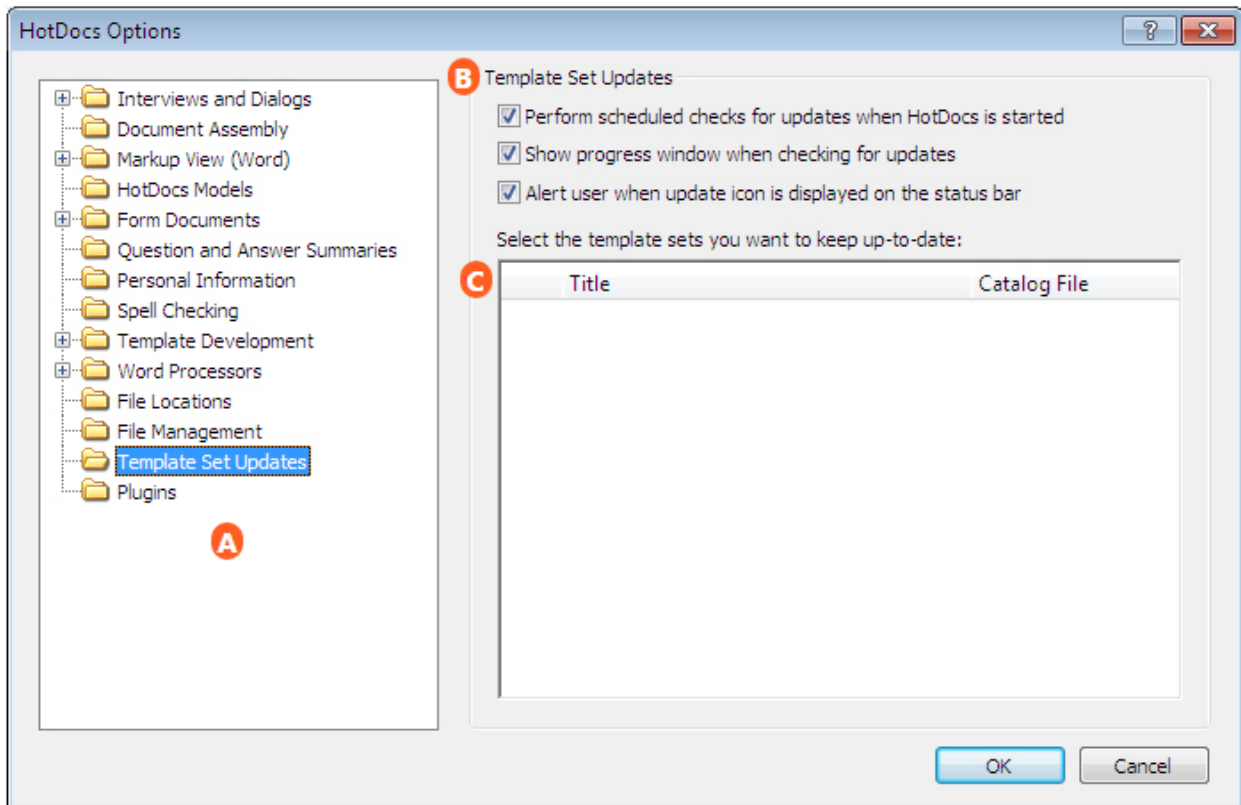
1. At the HotDocs library, click the  **Options** button.
2. Click the **File Management** folder.
3. Click the **Manage answer files using** drop-down button and select an option:
 - **HotDocs Answer File Manager** uses an answer library to create, store, and select answer files.

The first user to open an answer library is the only one who has *write access* to it. That means only one person can modify items in the library at any given time. If multiple users must access the answer files, use Windows Explorer to manage the files.


- **Windows Explorer** uses Windows Explorer to create, save, and select answer files.

Template Set Updates

At a Glance: Template Set Updates (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you select **Template Set Updates** you will see the **Template Set Updates Options** dialog box. From here you can change how HotDocs updates your template sets.

There are 3 check boxes at the top of the page **B**, these control when HotDocs updates the template sets and how the update progress will be displayed:

- Check the first box if you would like HotDocs to check for updates every time the library is opened.
- Check the second box if you would like HotDocs to show a progress window while it is checking for updates.
- Check the third box if you would like HotDocs to alert you when there is an update icon displayed on the status bar.

Underneath these options will be a list **C** of all the template sets you can keep updated.


Follow the link below to find out more about setting options for template set updates:

- [Determine How Frequently HotDocs Checks for Template Set Updates](#)

Determine How Frequently HotDocs Checks for Template Set Updates

If you are using a published template set and the template publisher provides automatic updates, you can have HotDocs check for these updates each time you start HotDocs. (Please check with your template set publisher to determine if your template set includes automatic updates.)

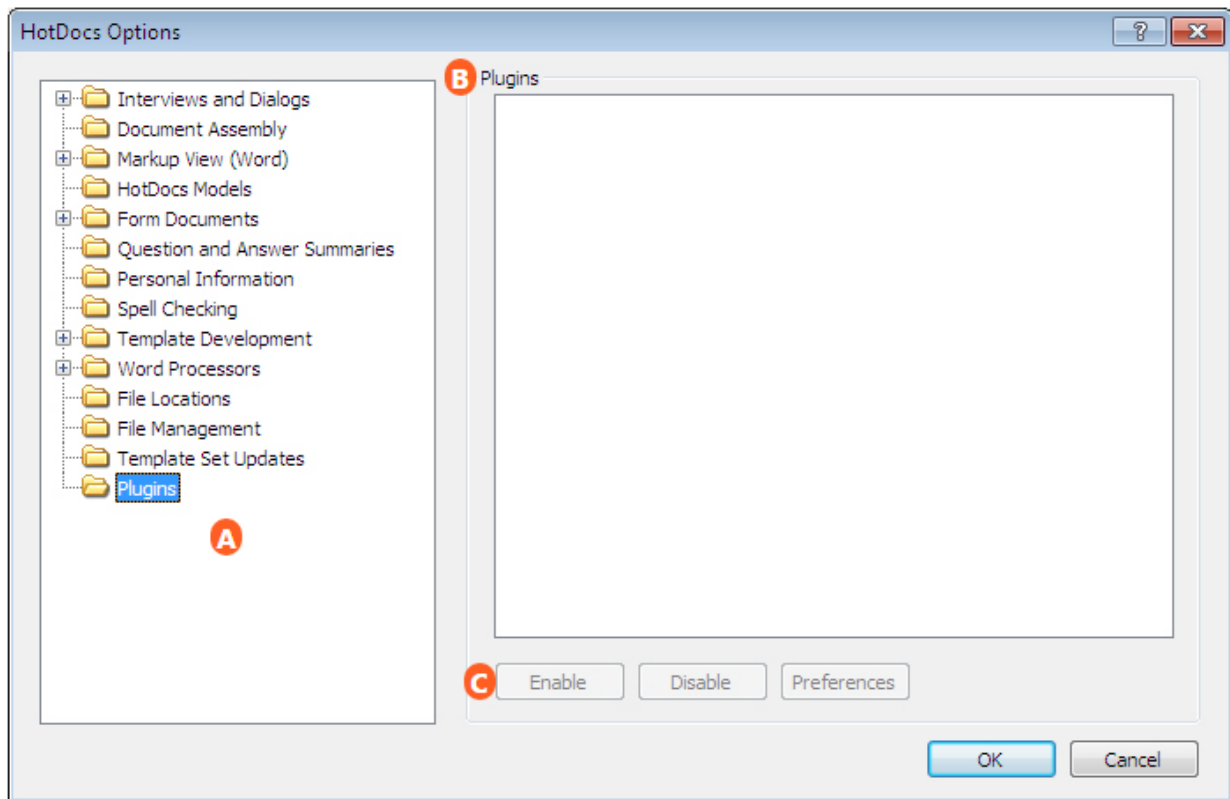
To check for template set updates

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Template Set Updates** folder. The window changes to show update options.
3. Complete any of the following optional steps:


To	Do This
Always check for updates when you start HotDocs	Select Perform scheduled checks for updates when HotDocs is started . (If HotDocs detects an update, it displays a warning icon in the status bar of the HotDocs window.)
Display a window that shows the progress HotDocs makes in installing the updates	Select Show progress window when checking for updates .
Choose the template sets for which you want to check for updates	Select the set in the Select the template sets you want to keep up-to-date list.

Plugins

At a Glance: Plugins (HotDocs Options)



Illustrations used throughout the help file depict HotDocs Developer and may include features not present in HotDocs Player.

After opening  **HotDocs Options** from the toolbar (or **Tools** menu) in your HotDocs Library you can choose from a list of option pages in the left hand pane **A**.

If you select **Plugins** you will see the **Plugins Options** dialog box. From here you can enable or disable HotDocs Plugins.

In the **Plugin List** **B** you can see all the HotDocs plugins currently installed and you can click on an item in this list to highlight it.

With any item highlighted you can click the buttons **C** to **Enable** the plugin, **Disable** the plugin, or set your **Preferences**.


Follow the link below to find out more about setting options for plugins:

- [Set Options for HotDocs Plugins](#)


Set Options for HotDocs Plugins

If you are using HotDocs Plugins, you may need to enable or disable one or more at some point. You may also find it useful to set your preferences for each plugin. You can do all of this from the **HotDocs Options** dialog box.

To Enable/Disable a Plugin

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Plugins** folder. The window changes to show plugin options.
3. Select any of the currently installed plugins from the **Plugin List**.
4. Click either the **Enable** or **Disable** button.

To Set Plugin Preferences

1. At the HotDocs library, click the  **Options** button. The **HotDocs Options** dialog box appears.
2. Click the **Plugins** folder. The window changes to show plugin options.
3. Select any of the currently installed plugins from the **Plugin List**.
4. Click the **Preferences** button. This opens the **Plugin Preferences** dialog box.
- 5.

Using Command Line Options

Introduction: Command-Line Options

Command-line options control the way HotDocs assembles text and form documents. You can place most options on any command line that causes HotDocs to run. They are case-sensitive and must be typed in lowercase letters. If the option requires you to include a full file path, you must enclose the file path with quotation marks (" ").

You can use command-line options in different ways, including specifying the options at the command line, at the **Properties** dialog box of a given template, within an ASSEMBLE instruction, and for the program file's shortcut.

Most command-line options control certain aspects of document assembly. For example, you can specify an option that always prints an assembled document once it has been sent to the word processor.

When you start HotDocs from the command line, it will continue to run, even after the processing of the command-line request is completed. To close HotDocs after it processes the command-line request, use the **Exit HotDocs** option.

When using multiple options on a single command line, separate each option with a space character. If the command line includes space characters, you must enclose the path in quotation marks (" ").

See Also

[Full List of Command-line Options](#)

Use Command-Line Options When Starting HotDocs

To use command-line options when starting HotDocs

1. Choose **Run** from the **Start** menu. The **Run** dialog box appears.
2. Type "**C:\Program Files\hotdocs.exe**" (including the quotation marks) followed by a space and the options you want in the **Open** field. For example:

```
"C:\Program Files\HotDocs\Hotdocs.exe" /tf=demoempl.docx
```

3. Click **OK**. If HotDocs is not already running, it loads and then performs the command-line instructions. If HotDocs is already running, it performs the command-line instructions.


Use Command-Line Options when Using a Shortcut to Start HotDocs

To use command-line options when using a shortcut to start HotDocs

1. Locate the HotDocs program file shortcut. (A shortcut is an icon on the desktop or **Start** menu that a user can click to quickly access a program.)
2. Right-click the icon and select **Properties** from the shortcut menu. The program item's **Properties** dialog box appears.
3. Select the **Shortcut** tab.
4. In the **Target** field, enter a space after the executable (.EXE) file and type the options you want.

Use Command-Line Options within ASSEMBLE Instructions


To use command-line options within ASSEMBLE instructions

1. Open the library you need at the HotDocs library window.
2. Select the template with the ASSEMBLE instruction you wish to add a command-line option to, and click  **Edit**.
3. Double click on the ASSEMBLE instruction.
4. The **Other Field** dialog box will open.
5. In the **Template to assemble** field, following the file name, type a space and the command-line options you want to use. For example:

Collection Letter.docx /sa

Use Command-Line Options at File Properties

To add command-line options to a library item

1. Open a library at the HotDocs library window.
2. Select the library item and click the  **Properties** button to open the **Item Properties** dialog box.
3. In the **File name** field, following the file name, type a space and the command-line options you want to use. For example:

```
/af="C:\Documents and Settings\Username\My
Documents\HotDocs\Answers\jalvey.anx"
```

Full List of Command-Line Options

Below is a list of all the available command-line options grouped by use. For more information on any option follow the link to its full description.

Application Control Switches

These switches are used to feed instructions to the HotDocs executable from the command line.

Option		Description
Mutually Exclusive*	/tf=""	The Template File option causes HotDocs to assemble a document using the specified template or clause library.
	/ha=""	The HotDocs Auto-Assemble File option causes a document to be assembled using the specified auto-assemble (.HDA) file.
	/hi=""	The HotDocs Auto-Install File option causes the template set in the specified auto-install (.HDI) file to be installed. During this process, HotDocs prompts the user for any required information it needs to install the template library to the correct location.
/lf=""		The Library File option allows you to start HotDocs and open a specific library. If HotDocs is already running, it opens the library specified by the path and file name.
/ll		The Lock Library option locks the current library and prevents the user from editing the library or its contents. Specifically, when HotDocs is launched and the library appears, users can select templates and assemble documents from them. They can also view the answer library and change user preferences at the HotDocs

		Options dialog box. All other options are unavailable.
/ex		The Exit HotDocs option closes HotDocs when both of the following conditions are met: 1) there are no documents waiting to be assembled, and 2) all other programs are finished using HotDocs.
/db		The Don't Brag option stops HotDocs from displaying the splash screen when it opens.
Mutually Exclusive*	/hl	The Hide Library option causes HotDocs to assemble a document without first displaying the HotDocs template library. The user will not see the template library window at all during assembly. It is most commonly used by integrators who are using HotDocs with a third-party program and want to start an assembly without first displaying the template library window.
	/sl	The Show Library option forces HotDocs to display the template library if it is currently not showing. This is useful if you are integrating HotDocs with another program and you have hidden the library using the Hide Library option.

Template Type Switch

When a template is referred to by HotDocs, the template type is inferred from the file name extension. However, in some cases additional information is required so HotDocs knows how to process the requested template. This switch (usable in combination with the /tf="" switch, on library items) can help with that.

Option	Description
/cl="name"	The Clause Name option is used by HotDocs to identify which clause component is associated with an item in a clause library. It is also used by HotDocs to process INSERT instructions during the assembly process. Generally speaking, developers should never have to modify this option unless they are converting clauses from one file format to another. Likewise, end users may see the Clause Name option while working with clauses at a clause library or during assembly, but should not modify it.

Answer Initialization Switches

These switches are used to initialize & define the answer set that will be used for an interview or assembly. They can be used in combination with the /tf="" switch and on library items.

Option	Description
/df=""	The Default Answer File option specifies a default answer file that is used to "seed" any answer file created during assembly. When a new answer file is created, it is automatically loaded with answers from the default answer file.
Mutually /af=""	The Answer File option is useful if you want to use a specific answer file when you

Exclusive*		assemble a document. The option does two things: 1) when a template is selected for assembly, it immediately opens the specified answer file without displaying the Answer File dialog box, and 2) it sets the value for path and file name as the current answer file name to be used when answers are saved. If the specified answer file doesn't exist, it will be created when the user saves the answers
	/na[=""]	The New Answer File option specifies a new, untitled answer file to be used when assembling a given document. This option causes HotDocs to suppress the Answer File dialog box, which normally appears before assembly. Specifying a path and file name is optional. If a file name is specified, it will be used for the new answer file. If an answer file with that same name already exists, HotDocs overwrites the existing file with the new one. If no file name is specified, HotDocs displays a Save Answer File dialog box at the end of assembly.
	/ov=""	The Overlay Answer File option causes HotDocs to take answers from a specific answer file and overlay them in the current answer file. For example, if you have specific information about a client that can be used in assembling multiple documents, you can save just that information in an overlay answer file and then use the Overlay Answer File option to force HotDocs to use those answers when assembling a document. All answers entered during assembly (including overlaid answers) are saved to the current answer file—not the overlay answer file—thus maintaining the integrity of the overlay answer file. An overlay answer file is loaded after the regular answer file so that the answers contained therein can overlay existing answers.

Interview Behavior Switches

These switches are used to modify the default behavior of the assembly window. They can be used in combination with the /tf="" switch and on library items.

Option		Description
Mutually Exclusive*	/nw	The No Assembly Window option causes HotDocs to assemble a document without displaying the assembly window.
	/ni	The No Interview option removes the Interview tab from the assembly window, and, by default, displays the assembled document in the Document Preview or Form Document tab (depending on whether you are assembling a text or form document). To present a correctly assembled document, you should specify an answer file using the Answer File option. Otherwise, the document will be assembled without any answers.
	/fia	When a user starts assembling a template that has the Finish Interview Action command-line option applied, HotDocs will complete the action defined in HotDocs Options—either display the assembled document at the Document tab of the assembly window or send the document to the word processor or HotDocs Filler. (See Control What Happens When You Finish an Interview .)
	/la	The Lock Answer File option prevents users from opening, closing, and saving answer files during document assembly. If it is the only option used, however, users can choose an answer file before assembly and save any answers they have entered

	after assembly.
/sig	The Start Interview Group option is used to control which questions are asked when assembling a group of related documents, specifically, it keeps questions that are already answered in one interview from being asked in subsequent interviews. It must be used with the Keep Interview Group option, which must be assigned to each subsequent template within the group.
/kig	The Keep Interview Group option is used to control which questions are asked when assembling a group of related documents, specifically, it keeps questions that are already answered in one interview from being asked in subsequent interviews. It must be used with the Start Interview Group option, which must be assigned to each subsequent template within the group.
/is=u	The Interview Scope option allows you to ask only those dialogs that contain questions not answered by an existing answer file. This may be useful, for example, if you have some answers you are retrieving from a database that you don't want the user to change. Using this option will ask only those questions that don't have answers. Cannot be used with the Start Interview Group option or the Keep Interview Group option.
/sw	The Suppress Unanswered Warning option keeps HotDocs from displaying the warning dialog box that appears when the user attempts to either print, save, or send the assembled document to the word processor and the assembled document still contains unanswered questions.

Answer Disposition Switches

These **mutually exclusive** switches can be used to dictate what happens to answers that were modified while the assembly window was open or during assembly. They can be used in combination with the /tf="" switch and on library items.

Option		Description
Mutually Exclusive*	/sa	The Save Answers option forces an answer file to be saved at the end of an assembly. If using an existing answer file, any answers entered during the interview will be saved automatically. If using a new, untitled answer file, HotDocs will force the user to specify an answer file name.
	/sap	The Save Answers Prompt option, which is used in connection with an ASSEMBLE instruction, prompts the user to save an answer file after completing an interview. Regardless of whether the user uses an existing answer file during assembly, when the user finishes that assembly, HotDocs prompts to save the answers in a different file.
	/ss	The Suggest Save option, which is used in connection with an ASSEMBLE instruction, causes HotDocs to ask users after assembly of a document has finished if they want to save answers entered during the interview in an answer file. Specifically, if the user has assembled a document and made changes to an existing answer file, HotDocs prompts to save the answers to that file. If saving a new, untitled file, HotDocs allows the user to specify the new answer file name.
	/ssn	The Suggest Save New option, which is used in connection with an ASSEMBLE

		instruction, causes HotDocs to ask if answers should be saved in a new answer file after assembly of a document has finished. Regardless of whether the user is using an existing answer file during assembly, when the user finishes that assembly, HotDocs gives the user the option of saving the answers in a new answer file.
	/da	The Discard Answers option prevents the user from saving answers after the document has been assembled. This option is useful when you know you will never want to save the answers you use with a particular template (for example, a fax cover sheet), and you don't want HotDocs to ask about saving the answers when you close the assembly window. However, the user can save the answer file during the interview.

Document Disposition Switches

These switches can be used to dictate what happens to a document after its assembly is complete. They can be used in combination with the /tf="" switch and on library items.

Option	Description
/of=""	The Output File option causes HotDocs to assemble the document and save it using the file name specified. If you are using the Answer Summary or Question Summary options, the Output File option specifies the name for either of those generated documents. This is useful if you know you want to save an assembled document every time assembly of that document finishes.
/as	The Answer Summary option is used with the Output File option to specify the path and file name for saving an answer summary. It is useful if you want a certain template to always generate an answer summary document.
/qs	The Question Summary option is used with the Output File option to specify the path and file name for saving a question summary. It is useful if you want a certain template to always generate a question summary document.
/sto	The Send to Plugin option sends the assembled document to a specified output plugin.
/stw	The Send to Word Processor option sends the assembled document to the word processor once the user closes the assembly window. This is useful if you know you always want to view the assembled document using the word processing program.

Automator/Filler Command Line Switches

These switches can be used to dictate how HotDocs will print form templates from HotDocs Automator/Filler.

Option	Description
/pr	The Print option causes HotDocs to print a copy of the assembled text or form document once the user closes the assembly window. This is useful if you know you will always need to print a copy of a specific assembled document.

/pw		The Print Without Dialogs option causes HotDocs to bypass the Print dialog box and print the form using the current printer. The form is printed when the user clicks the Print Document button at the assembly window.
/ps=""		The Paper Size option selects the specified paper size when the user prints a copy of the form template or document. The effect is the same as manually setting the page size from the Print dialog box. This option works with form templates and documents only.
/pt=""		The Paper Tray option causes a specified printer paper tray or manual feed option to be used when printing a form document from HotDocs Filler. Paper tray values that can be used include manual , upper , lower , and so forth. For a complete list of acceptable values, either at the assembly window or at the HotDocs Filler window, click Document Properties > Printing (File menu) and click the Paper Source drop-down button.
/pc=n		The Print Copies option specifies the number of copies that should be printed when the user prints the form document (type in the number of copies needed instead of the letter n). This number should appear in the Number of Copies field at the Print dialog box.
/pd		The Print Duplex option sets the duplex printing option for a given form document. It prints the document Double-Sided, Side-to-Side , as if that option were selected at the Printing Properties dialog box (which you can access by clicking Document Properties > Printing (File menu) .) When the user prints the form document, it is printed using this option.
Mutually Exclusive*	/pa	The Print Answers Only option selects the Answers Only (Use Preprinted Form) option at the Print dialog box. Then, when the user prints the assembled form document, it prints only the form's answers and not the underlying static text. This allows you to use preprinted forms.
	/po	The Print Form Only option selects the Form Only (Blank Form) option at the Print dialog box. Then, when the user prints the form document, it prints a blank copy of the form without answers.
	/pb	The Print Both option selects the Form with Answers option at the Print dialog box. Then, when the user prints the form document, the current form and its answers are printed.

*Mutually exclusive switches will not show an error if used in the same command-line but will cause unpredictable behavior. We recommend you do not use these switches together.

Answer File

/af="path and file name"

The **Answer File** option is useful if you want to use a specific answer file when you assemble a document. The option does two things: 1) when a template is selected for assembly, it immediately opens the specified answer file without displaying the **Answer File** dialog box, and 2) it sets the value for path and file name as the current answer file name to be used when answers are saved. If the specified answer file doesn't exist, it will be created when the user saves the answers.

When using an existing answer file, you can retrieve an answer file from a location on a Web server by specifying a URL for the path and file name (for example, */af=http://www.yoursite.com/answers.anx*). (You cannot, however, save an answer file back to the server.)

You cannot assign the **Answer File (/af)** option to a HotDocs Auto-Assemble file.

If using this option at the command line, include the **Template File (/tf)** option.

Answer Summary

/as

The **Answer Summary** option is used with the **Output File** option to specify the path and file name for saving an answer summary. It is useful if you want a certain template to always generate an answer summary document.

The **Answer Summary** option is normally used with the **No Assembly Window** and **Answer File** options, which cause HotDocs to automatically create and save the answer summary document without displaying the assembly window.

Answer summaries are saved in HTML format.

If using this option at the command line, include the **Template File (/tf)** and **Output File (/of)** options. If using this option at the library properties, include the **Output File (/of)** option.

Clause Name

/cl=clausename

The **Clause Name** option is used by HotDocs to identify which clause component is associated with an item in a clause library. It is also used by HotDocs to process INSERT instructions during the assembly

process. Generally speaking, developers should never have to modify this option unless they are converting clauses from one file format to another. Likewise, end users may see the **Clause Name** option while working with clauses at a clause library or during assembly, but should not modify it.

Default Answer File

```
/df="path and file name"
```

The **Default Answer File** option specifies a default answer file that is used to "seed" any answer file created during assembly. When a new answer file is created, it is automatically loaded with answers from the default answer file.

When specified, it does not need to have the same file name as the template's component file, nor does it need to be saved in the same folder as the component file. However, the default answer file name should be different from the current answer file name. Also, when using an existing default answer file, you can retrieve it from a location on a Web server by specifying a URL for the path and file name (for example, */df=http://www.yoursite.com/defaultanswers.anx*).

If using this option at the command line, include the **Template File (/tf)** option.

Discard Answers

```
/da
```

The **Discard Answers** option prevents the user from saving answers after the document has been assembled. This option is useful when you know you will never want to save the answers you use with a particular template (for example, a fax cover sheet), and you don't want HotDocs to ask about saving the answers when you close the assembly window. However, the user can save the answer file during the interview.

To disable all answer file usage (saving, selecting new, and so forth) during a given assembly, use the **Lock Answer File (/la)** option.

If using this option at the command line, include the **Template File (/tf)** option.

Don't Brag

/db

The **Don't Brag** option stops HotDocs from displaying the splash screen when it opens.

Exit HotDocs

/ex

The **Exit HotDocs** option closes HotDocs when both of the following conditions are met: 1) there are no documents waiting to be assembled, and 2) all other programs are finished using HotDocs.

Finish Interview Action

/fia

When a user starts assembling a template that has the **Finish Interview Action** command-line option applied, HotDocs will complete the action defined in HotDocs Options—either display the assembled document at the **Document** tab of the assembly window or send the document to the word processor or HotDocs Filler.

If using this option at the command line, include the **Template File (/tf)** and **Answer File (/af)** options. If using this option at the library properties, include the **Answer File (/af)** option.

Hide Library

/hl

The **Hide Library** option causes HotDocs to assemble a document without first displaying the HotDocs template library. The user will not see the template library window at all during assembly. It is most

commonly used by integrators who are using HotDocs with a third-party program and want to start an assembly without first displaying the template library window. (See also [Show Library](#).)

If using this option at the command line, include the **Template File (/tf)** option.

HotDocs Auto-Assemble File

```
/ha="path and file name"
```

The **HotDocs Auto-Assemble File** option causes a document to be assembled using the specified auto-assemble (.HDA) file.

You can also specify a URL for the path and file name (for example, */ha=http://www.yoursite.com/hdafile.hda*).

HotDocs Auto-Install File

```
/hi="path and file name"
```

The **HotDocs Auto-Install File** option causes the template set in the specified auto-install (.HDI) file to be installed. During this process, HotDocs prompts the user for any required information it needs to install the template library to the correct location.

You can also specify a URL for the path and file name (for example, */hi=http://www.yoursite.com/hdifile.hdi*). When this command is passed, HotDocs downloads the file and prompts the user for the information needed to install the template library.

Interview Scope

```
/is=u
```

The **Interview Scope** option allows you to ask only those dialogs that contain questions not answered by an existing answer file. This may be useful, for example, if you have some answers you are retrieving from a database that you don't want the user to change. Using this option will ask only those questions that don't have answers.

Cannot be used with the **Start Interview Group (/sig)** option or the **Keep Interview Group (/kig)** option.

Keep Interview Group

/kig

The **Keep Interview Group** option is used to control which questions are asked when assembling a group of related documents, specifically, it keeps questions that are already answered in one interview from being asked in subsequent interviews. It must be used with the **Start Interview Group** option, which must be assigned to each subsequent template within the group.

For example, you have three related templates that will be added to the assembly queue (*Template A*, *Template B*, and *Template C*). Each of these templates uses *Variable A*. To keep *Variable A* from being asked in all three interviews, you would assign the **Start Interview Group** option to *Template A*. Then you would assign the **Keep Interview Group** option to *Templates B* and *C*. Once the user answers *Variable A*, it will not be asked in any subsequent interviews.

If a template is added to the assembly queue that doesn't use either of these options, it and any subsequent templates will not be included in the interview group.

Library File

/lf="path and file name"

The **Library File** option allows you to start HotDocs and open a specific library. If HotDocs is already running, it opens the library specified by the path and file name.

Lock Answer File

`/la`

The **Lock Answer File** option prevents users from opening, closing, and saving answer files during document assembly. If it is the only option used, however, users can choose an answer file before assembly and save any answers they have entered after assembly.

To keep users from choosing an answer file before assembly, specify an answer file using the **Answer File** option. To keep them from manually saving their answers, use either the **Discard Answers** option or the **Save Answers** option.

If using this option at the command line, include the **Template File (/tf)** option.

Does not work in conjunction with the **No Assembly Window (/nw)** option.

Lock Library

`/ll`

The **Lock Library** option locks the current library and prevents the user from editing the library or its contents. Specifically, when HotDocs is launched and the library appears, users can select templates and assemble documents from them. They can also view the answer library and change user preferences at the **HotDocs Options** dialog box. All other options are unavailable.

New Answer File

`/na[="path and file name"]`

The **New Answer File** option specifies a new, untitled answer file to be used when assembling a given document. This option causes HotDocs to suppress the **Answer File** dialog box, which normally appears before assembly. Specifying a path and file name is optional. If a file name is specified, it will be used for the new answer file. If an answer file with that same name already exists, HotDocs overwrites the existing file with the new one. If no file name is specified, HotDocs displays a **Save Answer File** dialog box at the end of assembly.

When specifying an answer file name, you must include the file name extension .ANX.

If using this option at the command line, include the **Template File (/tf)** option.

No Assembly Window

`/nw`

The **No Assembly Window** option causes HotDocs to assemble a document without displaying the assembly window.

If using this option at the command line, include the **Template File (/tf)** and **Answer File (/af)** options. If using this option at the library properties, include the **Answer File (/af)** option.

You should also use the **Output File (/of)** or **Send to Word Processor (/stw)** option if you want HotDocs to produce a document at the end of the assembly.

No Interview

`/ni`

The **No Interview** option removes the **Interview** tab from the assembly window, and, by default, displays the assembled document in the **Document Preview** or **Form Document** tab (depending on whether you are assembling a text or form document). To present a correctly assembled document, you should specify an answer file using the **Answer File** option. Otherwise, the document will be assembled without any answers.

While viewing an assembled document that was generated using this command-line option, you cannot edit answers while viewing the **Document** tab.

If using this option at the command line, include the **Template File (/tf)** and **Answer File (/af)** options. If using this option at the library properties, include the **Answer File (/af)** option.

Output File

`/of="path and file name"`

The **Output File** option causes HotDocs to assemble the document and save it using the file name you specify. If you are using the **Answer Summary** or **Question Summary** options, the **Output File** option specifies the name for either of those generated documents. This is useful if you know you want to save an assembled document every time that HotDocs finishes assembling that document.

Changing the file extension on the file specified in the Output File option instructs HotDocs to convert the output file to the new file type. For example, adding the command line option `/of="C:\templatename.docx"` to an RTF template results in a DOCX format output file.

Since HotDocs cannot convert to all format types, we recommend that you manually test HotDocs conversion capabilities for a desired format before adding the command-line option. Be aware as well that converting output files to alternate formats can sometimes cause variations in formatting and user experience.

If you use this option with the command line, be sure to include the **Template File (/tf)** option.

Limitations When Using /of with /nw

Normally, the file extension on the file specified in the `/of` command line switch instructs HotDocs to convert the assembled document to a file of that type after assembly. However, when converting to PDF, this only works when the assembly window is visible. When you hide the assembly window (by using the [/nw switch](#)), conversion to a PDF document is not supported. HotDocs does, however, save the assembled document to a file with a .PDF extension as instructed by the `/of` command line switch. This can be confusing if you specify `"tf=template.docx /of=document.pdf"` in the command line after using a `/nw` switch. In this case, HotDocs assembles a DOCX document from the DOCX template, but saves the DOCX document in the file system with the filename specified by the `/of` switch (document.pdf). If you then double-click that file in Windows Explorer, the application mapped to the PDF file extension (usually Adobe Reader) tries to open the file but fails because the file contains a DOCX document, not a PDF document (as the file extension claims).

In cases where the assembly window is hidden by specifying the `/nw` switch, only native word processor file types are supported for the `/of` commandline switch, as follows:

Template type	Allowed output file
DOCX	DOCX
RTF	RTF, DOCX
DOT	RTF, DOCX

Work Around

A possible work around is to use Microsoft Word's PDF conversion feature to accomplish the same result, using either Word's graphical user or programming interface.

Overlay Answer File

`/ov="path and file name"`

The **Overlay Answer File** option causes HotDocs to take answers from a specific answer file and overlay them in the current answer file. For example, if you have specific information about a client that can be used in assembling multiple documents, you can save just that information in an overlay answer file and then use the **Overlay Answer File** option to force HotDocs to use those answers when assembling a document. All answers entered during assembly (including overlaid answers) are saved to the current answer file—not the overlay answer file—thus maintaining the integrity of the overlay answer file. An overlay answer file is loaded after the regular answer file so that the answers contained therein can overlay existing answers.

If you do not include a full path on the command-line, HotDocs will first look for the answer file in the same folder as the template. If it's not located there, HotDocs will look in the *Answers* folder.

You can retrieve an overlay answer file from a location on a Web server by specifying a URL for the path and file name (for example, `/ov=http://www.yoursite.com/overlayanswers.anx`).

If you are saving the overlay answer file to the same folder as the template, do not use the same name as the template. Otherwise, HotDocs will think the answer file is a default answer file. (See [Create a Default Answer File](#).)

If using this option at the command line, include the **Template File (/tf)** option.

Paper Size

`/ps=paper size`

The **Paper Size** option selects the specified paper size when the user prints a copy of the form template or document. The effect is the same as manually setting the page size from the **Print** dialog box. This option works with form templates and documents only.

Paper size values that can be used include **letter**, **legal**, and so forth. For a complete list of acceptable values, either at the assembly window or at the HotDocs Filler window, click **Document Properties > Printing (File menu)** and click the **Paper Size** drop-down button. Values that include a space character must be placed inside quotation marks. You can shorten the values as long as the shortened form matches only one paper size. Paper size values are not case-sensitive.

If a paper size is specified at the **Printing Properties** dialog box and the **Paper Size (/ps)** command-line option is also used, the command-line option takes precedence.

If using this option at the command line, include the **Template File (/tf)** option

Paper Tray

```
/pt=paper tray
```

This option is used with form documents only.

The **Paper Tray** option causes a specified printer paper tray or manual feed option to be used when printing a form document from HotDocs Filler. Paper tray values that can be used include **manual**, **upper**, **lower**, and so forth. For a complete list of acceptable values, either at the assembly window or at the HotDocs Filler window, click **Document Properties > Printing (File menu)** and click the **Paper Source** drop-down button.

If a paper source is specified at the **Printing Properties** dialog box and the **Paper Tray (/pt)** command-line option is also used, the command-line option takes precedence.

If using this option at the command line, include the **Template File (/tf)** option.

Print

```
/pr
```

This option is used with form documents only

The **Print** option causes HotDocs to print a copy of the assembled text or form document once the user closes the assembly window. This is useful if you know you will always need to print a copy of a specific assembled document.

If using this option at the command line, include the **Template File (/tf)** option.

Print Answers Only

/pa

This option is used with form documents only

The **Print Answers Only** option selects the **Answers Only (Use Preprinted Form)** option at the **Print** dialog box. Then, when the user prints the assembled form document, it prints only the form's answers and not the underlying static text. This allows you to use preprinted forms.

If using this option at the command line, include the **Template File (/tf)** option.

Print Both

/pb

This option is used with form documents only

The **Print Both** option selects the **Form with Answers** option at the **Print** dialog box. Then, when the user prints the form document, the current form and its answers are printed.

If using this option at the command line, include the **Template File (/tf)** option.

Print Copies

/pc=numberofcopies

This option is used with form documents only

The **Print Copies** option specifies the number of copies that should be printed when the user prints the form document. This number should appear in the **Number of Copies** field at the **Print** dialog box

If using this option at the command line, include the **Template File (/tf)** option.

Print Duplex

/pd

This option is used with form documents only

The **Print Duplex** option sets the duplex printing option for a given form document. It prints the document **Double-Sided, Side-to-Side**, as if that option were selected at the **Printing Properties** dialog box (which you can access by clicking **Document Properties > Printing (File menu)**.) When the user prints the form document, it is printed using this option.

If using this option at the command line, include the **Template File (/tf)** option.

Print Form Only

/po

This option is used with form documents only

The **Print Form Only** option selects the **Form Only (Blank Form)** option at the **Print** dialog box. Then, when the user prints the form document, it prints a blank copy of the form without answers.

If using this option at the command line, include the **Template File (/tf)** option.

Print Without Dialogs

/pw

This option is used with form documents only

The **Print Without Dialog** option causes HotDocs to bypass the **Print** dialog box and print the form using the current printer. The form is printed when the user clicks the **Print Document** button at the assembly window. .

If using this option at the command line, include the **Template File (/tf)** option.

Question Summary

/qs

The **Question Summary** option is used with the **Output File** option to specify the path and file name for saving a question summary. It is useful if you want a certain template to always generate a question summary document.

The **Question Summary** option is normally used with the **No Assembly Window** option, which causes HotDocs to automatically create and save the question summary document without displaying the assembly window.

Question summaries are saved in HTML format.

If using this option at the command line, include the **Template File (/tf)** option.

Save Answers

/sa

The **Save Answers** option forces an answer file to be saved at the end of an assembly. If using an existing answer file, any answers entered during the interview will be saved automatically. If using a new, untitled answer file, HotDocs will force the user to specify an answer file name.

To always force the user to save a new answer file after entering answers in an interview—even if using an existing answer file—use the **Save Answers Prompt (/sap)** option.

To give users the option of saving an answer file, rather than forcing them to save, use either the **Suggest Save (/ss)** or the **Suggest Save New (/ssn)** option.

Save Answers Prompt

```
/sap
```

The **Save Answers Prompt** option prompts the user to save an answer file after completing an interview. Regardless of whether the user uses an existing answer file during assembly, when the user finishes that assembly, HotDocs prompts to save the answers in a different file.

To always save an answer file without prompting the user for an answer file name (unless the user is using a new answer file) use the **Save Answers (/sa)** option.

To give users the option of saving an answer file, rather than forcing them to save, use either the **Suggest Save (/ss)** or the **Suggest Save New (/ssn)** option.

Send to Plugin

```
/sto="Name of Plugin"
```

The **Send to Plugin** option sends the assembled document to a specified output plugin. The class name of the plugin is the plugin name. For example, to use a google upload plugin the command line switch would be:

```
/sto="HDGoogleDriveOutputPlugin"
```

If using this option at the command line, include the **Template File (/tf)** option

Send to Word Processor

```
/stw
```

The **Send to Word Processor** option sends the assembled document to the word processor once the user closes the assembly window. This is useful if you know you always want to view the assembled document using the word processing program.

If using this option at the command line, include the **Template File (/tf)** option.

Show Library

/sl

The **Show Library** option forces HotDocs to display the template library if it is currently not showing. This is useful if you are integrating HotDocs with another program and you have hidden the library using the **Hide Library** option.

Start Interview Group

/sig

The **Start Interview Group** option is used to control which questions are asked when assembling a group of related documents, specifically, it keeps questions that are already answered in one interview from being asked in subsequent interviews. It must be used with the **Keep Interview Group** option, which must be assigned to each subsequent template within the group.

For example, you have three related templates that will be added to the assembly queue (*Template A*, *Template B*, and *Template C*). Each of these templates uses *Variable A*. To keep *Variable A* from being asked in all three interviews, you would assign the **Start Interview Group** option to *Template A*. Then you would assign the **Keep Interview Group** option to *Templates B* and *C*. Once the user answers *Variable A*, it will not be asked in any subsequent interviews.

If a template is added to the assembly queue that doesn't use either of these options, it and any subsequent templates will not be included in the interview group.

Suggest Save

/ss

The **Suggest Save** option causes HotDocs to ask users after assembly of a document has finished if they want to save answers entered during the interview in an answer file. Specifically, if the user has assembled a document and made changes to an existing answer file, HotDocs prompts to save the answers to that file. If saving a new, untitled file, HotDocs allows the user to specify the new answer file name.

If your user is using an existing answer file but you want to give the user the option of saving the answers in a new, different answer file, use the **Suggest Save New (/ssn)** option.

If you want to force users to save their answers after an assembly is finished, rather than give them the option, use either the **Save Answers (/sa)** or the **Save Answers Prompt (/sap)** options.

Suggest Save New

`/ssn`

The **Suggest Save New** option causes HotDocs to ask if answers should be saved in a new answer file after assembly of a document has finished. Regardless of whether the user is using an existing answer file during assembly, when the user finishes that assembly, HotDocs gives the user the option of saving the answers in a new answer file.

If your users are using an existing answer file and you want them to save answers they have entered in that file instead of a new one, use the **Suggest Save (/ss)** option.

If you want to force users to save their answers after an assembly is finished, rather than give them the option, use either the **Save Answers (/sa)** or the **Save Answers Prompt (/sap)** options.

Suppress Unanswered Warning

`/sw`

The **Suppress Unanswered Warning** option keeps HotDocs from displaying the warning dialog box that appears when the user attempts to either print, save, or send the assembled document to the word processor and the assembled document still contains unanswered questions.

Template File

`/tf="path and file name"`

The **Template File** option causes HotDocs to assemble a document using the specified template or clause library.

If you want an interview template (component file) started from the **Template File** command line, the component file must have an INTERVIEW or STARTUP computation in it or assembly will fail.

Troubleshooting

Document Assembly

Can't Attach Answer File or Document to Outlook 2007 E-mail Message

Problem

When I try to attach an answer file or an assembled document file to an e-mail message, HotDocs displays the following error message: "Error Sending Message. One or more unspecified errors occurred." I am using Outlook 2007.

Solution

This is an Outlook 2007 problem. It sometimes occurs when the Outlook 2007 forms cache becomes corrupt. To correct it (at least temporarily), follow these steps:

1. In Outlook, choose **Tools > Forms > Choose Form**. The **Choose Form** dialog box appears.
2. Click the **Look In** drop-down button and choose **Standard Forms Library**.
3. Select one of the forms and open it.
4. Close the form. (You don't need to make any changes.)

[You may need to restart HotDocs for this to work.](#)

Changing Unanswered Text Markers

Problem

When I leave questions in the interview unanswered, HotDocs merges asterisks in the assembled document where the answer is supposed to go. I'd rather have it insert blank lines or something else less obtrusive. Can I change this?

Solution

You can choose the unanswered marker HotDocs uses when you leave questions unanswered in the interview. For details, see [Format Unanswered Variables in a Document](#).

[The template provider may have selected a specific unanswered marker for some questions in the interview. If this is the case, these markers will override your selection.](#)

Discerning Between Template Preview and Actual Template

Problem

When I preview the template at the **Preview** tab of the library or at the **Document Preview** tab of the assembly window, the preview looks different from the actual template or assembled document when I view it in the word processor. Why this difference in appearance?

Solution

Because of technical restrictions, HotDocs cannot display the actual word processor document in the library or at the assembly window. Instead, it uses a third-party application to render the text of the template or document.

This application depicts a Microsoft Word template or document fairly accurately because it is able to convert the text to RTF (if it's not already in RTF format). 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—there is no formatting.

In either case, however, the actual text in the template or document is correct.

Downloading HDIs and HDAs as ZIP Files

Problem

When downloading HotDocs auto-install (.HDI) or auto-assemble files (.HDA) from a server, files are saved to disk in ZIP format. Additionally, attempting to open or run the file results in HotDocs prompting the user for a ZIP file password.

Solution

The following are two solutions that should correct the problem.

- **Solution 1:** See [Receiving Error Messages When Launching HDAs, HDIs](#).
- **Solution 2:** Repair your installation of HotDocs. To do this, go to **Start > Settings > Control Panel > Add or Remove Programs**. Select your version of HotDocs in the list of programs and click **Change/Remove**. When prompted to either repair or uninstall HotDocs, choose **Repair** and complete the installation.

The second possible (and more likely) problem occurs because Windows XP examines files being downloaded. If they appear to be in the ZIP format (which both HDI and HDA files are), then regardless of the download extension, Windows concludes they are ZIP files and applies a .ZIP file name extension. Even

though you have a proper MIME type set up on your computer, Windows XP makes the change during the download.

To set the correct MIME types on the server

1. Bring up the IIS management tool (i.e. go to **Start > Programs > Administrative Tools > Internet Services Manager**).
2. Choose the Web site whose MIME types you need to change.
3. Right-click and choose **Properties** from the shortcut menu.
4. Click the **HTTP Headers** tab.
5. Click the **File Types** button.
6. Click the **New Type** button. (You will do this for both HDIs and HDAs.)
7. Enter the following information for each file type:

Type of File	MIME Type
Auto-install (HDI)	application/x-hotdocs
Auto-assemble (HDA)	application/x-hotdocs-auto


Editing Answers in Assembled Document

Problem

When viewing the assembled document, I can't edit the answers that are merged in the document. The help file says I should be able to.

Solution

You may not be able to edit answers at the **Document Preview** tab for one of three reasons:

- You are viewing a WordPerfect document. (Answer editing is not supported in WordPerfect templates and documents.)
- The template developer has not allowed it.
- The **Highlight Fields** option is turned off. To highlight fields again, click the  **Highlight Fields** button in the assembly window toolbar.

Entering a Two-Digit Year

Problem

I want to enter a two-digit year whenever I answer a date question, but HotDocs always displays the following error message: "You must enter a four-digit year".

Solution

As a safety precaution, HotDocs requires you to enter four digits when entering the year portion of a date. If you enter a two-digit date, such as 7/9/99, HotDocs responds with this message: "You must enter a four-digit year."


You can override this default option by specifying a century rollover year at the **HotDocs Options** dialog box. The number you enter controls how HotDocs interprets two-digit years. Two-digit years less than or equal to the number you enter are understood as *2000*-century years. Two-digit years greater than the number you enter are understood as *1900*-century years.

For example, if you specify a rollover value of 34, dates entered as 5/14/34 will appear as *14 May 2034*. A date entered as 5/14/35 will appear as *14 May 1935*.

[See Control How HotDocs Handles Two-Digit and Four-Digit Years for information on setting this option.](#)

HotDocs Skips Questions When Navigating from Child Dialog

Problem

After I answer questions in a child (or nested) dialog, I click  **Next** and HotDocs takes me to the next dialog in the interview—not back to the main-level dialog I was in originally. How can I keep this from happening?

Solution

HotDocs moves to the next dialog in the interview outline because of a default setting. Its behavior is most useful when child dialogs appear as the last item in a dialog, and, after answering questions in the child dialog, you want to move to the next dialog in the interview. However, there are times when you need to return to the parent dialog and continue answering questions in the current dialog.

If, instead, you want to return to the main-level dialog that uses the child, you can clear this default setting. At the assembly window, clear **Next Dialog Follows Outline** (**Navigate** menu).

Increasing Font Size

Problem

When answering questions in the interview, the text used in the dialogs is too small or too hard to read. Can I change it?

Solution

You can change the font, size, and color of the text used in a dialog. You can also change the properties of text used in the interview outline. For details, see [Customize the Look of the Dialog Pane](#).

Installing Support for New Word Processor

Problem

I've installed a new word processor, but when I try to use HotDocs with it, HotDocs won't recognize it.

Solution

After you have installed the new word processor, you must run the word processor at least once. This creates entries in the Windows System Registry, which HotDocs must be able to access before it can integrate with it.

Once the registry is updated with the required information, you must select the new word processor at HotDocs Options and choose to install support for it. For details, see [Install Support for New Word Processors](#).

It is possible your new word processor isn't compatible with HotDocs. If you are unsure, please see the list of HotDocs System Requirements (see System Requirements.)


Moving Between Questions in Interview Slow

Problem

Whenever I answer a question in an interview and try to move to the next question, it seems like it takes HotDocs a long time to respond. Moving between dialogs in the interview also seems slow. What can I do to make this process faster?

Solution

In an effort to keep the assembly process up to date, HotDocs updates the dialog and the interview outline each time you enter or edit an answer in the interview. Depending on the complexity of the interview or the document, this updating may take longer than desired.

You can minimize the amount of time HotDocs takes to update the interview or document with your changes by forcing it to update only when it needs to. You do this by turning  **Instant Update** off. When instant update is off, HotDocs updates dialogs and interviews only when it needs to. For details, see [Update Your Interview Outline and Document](#).


Moving to the Next Dialog After Entering a Date or Number

Problem

When I answer a date or number question in an interview and then click  **Next** or  **Previous**, HotDocs doesn't move me to the next dialog. I have to click  **Next** or  **Previous** again to move to that dialog.

Solution

When you type an answer in an answer field, HotDocs sometimes reads the answer and reformats it to appear a certain way. For example, if you type *February 6, 2006* in a date field, HotDocs will reformat the answer to appear as *6 Feb 2006*. Sometimes this reformatting can reveal an incorrectly interpreted answer, especially if the answer you typed is ambiguous. For example, the date *05/06/2006* may either be interpreted as *June 5, 2006* or as *May 6, 2006*.

Depending on where the reformatted answer appears in the dialog, you may not even be aware that it has been reformatted. For example, when you enter an answer in one of the first answer fields in a dialog and then move to the next field, you will most likely see that your answer has been reformatted. However, if you enter an answer in the last answer field and click  **Next** to advance to the next dialog, you may not see that the answer was reformatted.

In this situation, HotDocs keeps you in the dialog so you can review the change it has made to the format. For information on changing this default behavior, see [Warn When HotDocs Reformats Date and Number Answers](#).

Organizing Files in the Library vs. on the Disk

Problem

I don't understand the difference between how files are organized in my library and how they are organized on disk.

Solution

A HotDocs library is simply a tool for viewing and working with the files on the disk. Specifically:

- Files in the library are shortcuts that link to the actual files on disk (much like a desktop shortcut to an application you use frequently links to a program in your *Program Files* folder).
- Files in the library can be organized into "virtual" folders. These folders do not need to match the organization of folders on the desktop.
- Files in the library can be viewed using either the template title or the template file name. Files on disk are viewed only by file name.
- If you manually move a file on disk, you must update the reference to the file in the library or HotDocs will not know how to find the file. To move files while keeping the reference to the file updated in the library, use the **Move** or **Copy** commands in the library.

Overriding an Answer in a Form

Problem

What happens when I override an answer in a form document?

Solution

Sometimes you need to enter an answer in a form document, but you are unable to enter that answer because of formatting restrictions on that field. (Remember, dates and numbers must be formatted a certain way for HotDocs to consider them valid.) For example, say you enter 3,000,000 as an answer to a number variable. The field, however, may not be large enough to show the whole answer without sending it to the addendum. You can override the field's format and enter *3 mill.* as the answer.

Or perhaps you have a date that is appearing in one format (*19 May 2006*), but you want it to appear in a different format (*06/19/06*). You can override the field and enter the answer you need.

Overriding the format of the field allows you to enter whatever text you need in the answer field.

See [Override an Answer in a Form](#) for details on overriding form fields.

Overriding a field is like placing a sticky note over the field and writing on it—you can see what is written on the note, but HotDocs continues to use the original answer. Any other fields that use the answer, either in a calculation or a condition, will continue to do so. The original answer will likewise be saved in the answer file.

Printing Form Document is Off-Center

Problem

When I print my PDF-based form, the document appears off-center on the printed page.

Solution

This problem appears when you use Adobe Acrobat to print the document and you're using a non-PostScript printer driver.

To correct the problem, always use a PostScript printer driver.

See [Print an Assembled Form Document](#) for more details.

Printing Form Document Takes Incredibly Long Time***Problem***

When printing a PDF-based form document, it takes an incredibly long time for the document to actually print. What can I do to speed up this process?

Solution

This slowness happens when you print the document through HotDocs. To print more quickly, use Adobe Acrobat or Reader to print the document. See [Print an Assembled Form Document](#) for details on selecting this preference.

Receiving Error Messages When Launching HDAs, HDIs***Problem***

When attempting to run either a HotDocs Auto-Install file (HDI) or HotDocs Auto-Assemble file (HDA), HotDocs displays an error message and is unable to launch the file. The error message frequently says it cannot find *hd_dispatch.exe*, the application used to launch these files.

Solution

During installation, HotDocs creates certain entries in the Windows System Registry. One of these entries designates where the file *hd_dispatch.exe* should be found so that HDAs and HDIs can be properly run. By default, this file is usually created and registered in *C:\Program Files\HotDocs*. However, if you performed a custom installation and changed the program folder for HotDocs to some location other than *C:\Program Files\HotDocs*, this registry key was not updated with the new program files path. Because of this, HotDocs cannot run the HDA or HDI because it doesn't know where to look for *hd_dispatch.exe*.

To update the registry with the correct information

This workaround requires you to work in the Windows System Registry. Failure to follow these instructions carefully and entirely may result in you changing a setting that may adversely affect several other programs you use. If you are unsure of how to work with the registry, please ask your system administrator for assistance.

1. Click **Start > Run**. The **Run** dialog box appears.
2. In the **Open** field, type **regedit**. The **Registry Editor** appears.
3. Open **HKEY_CLASSES_ROOT > HotDocsHdaFile**. (To update the information for an HDI file, navigate to **HKEY_CLASSES_ROOT > HotDocsHdiFile**.)
4. Expand the folder so you can see its subfolders.
5. Click the **DefaultIcon** folder.
6. In the right pane, double-click **(Default)**. The **Edit String** dialog box appears.
7. Change the folder path in the **Value data** field so that it matches the folder where HotDocs is installed. Do not remove the **,1**.
8. Click **OK**.
9. In the same subfolder (in the right pane), expand **Shell > open > command**.
10. Repeat steps 6 through 8, updating the folder path so that it matches the folder where HotDocs is installed. Again, do not change the information after the file path.
11. Remember to update the file locations for both HDAs and HDIs. See step 3 in the list above.

Restoring System Defaults to HotDocs

Problem

I've altered several default settings for HotDocs, but now I want to restore the default settings I had when I installed HotDocs. How can I do this?

Solution

HotDocs uses the Windows System Registry to store your personal preferences for working with HotDocs. If you need to restore the installation defaults, you must clear the *Current User* section of the HotDocs portion of the System Registry.

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

To understand HotDocs installation and the changes that are made to the registry, please see [Understand HotDocs Installation](#).

1. At the **Start** menu, select **Run**. The **Run** dialog box appears.
2. In the **Open** field, type **regedit** and click **OK**. 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_CURRENT_USER > Software > LexisNexis > HotDocs 6**. If it 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**.

Saving Answers During Interview

Problem

HotDocs won't let me save answers during an interview. The buttons and menu options for doing so are disabled.

Solution

If the buttons and menu options for saving an answer file are disabled, it is because the template provider has either prohibited you from saving the answer file, or because the answer file is being saved automatically. If you have specific questions, please contact the template provider.

Specifying Printing Options When Printing Text Documents

Problem

When I print my assembled text document from the assembly window, HotDocs just automatically prints the document without prompting me for any of my preferences. (I don't get a **Print** or **Print Options** dialog box.) How do I first set my preferences before printing?

Solution


To set your preferences before you print the document, you must first send the document to the word processor. Once in the word processor, choose the **Print** command and then specify your settings.

Understanding What Happens When Deleting Templates from the Library

Problem

What happens when you delete templates from a library?

Solution

When you select a template or folder in a HotDocs library and click the  **Remove Items** button, HotDocs asks if you want to remove just the reference to the file from the library or if you want to delete the actual files from disk, too.

If you remove just the reference from the library, that specific reference to the file is removed from the library but the actual file still exists on disk. Additionally, if the item is referenced any other place in the library or in a different library, those references still exist.

If you choose to delete the item from disk, the reference is removed from the library and the file is sent to the Recycle Bin (if working with files on your local drive) or permanently deleted (if you're working with files on a network drive).

When you remove a folder from the library, you can choose to delete just the folder (in which case, items in the folder are moved to the next highest folder), or you can choose to delete the folder along with all of the items referenced in the folder.

For details, see [Remove Items from a Library](#).

Updating Changes Made in Word Processor Document in the Answer File, Template

Problem

I've edited text in my assembled document but neither the template nor the answer file shows these changes. How do I update these files with my changes?

Solution

Once you send an assembled document to the word processor, it becomes "disconnected" from HotDocs. If you make changes to the document, those changes will not be represented in either the template or the answer file.

To update the template with your changes, you must edit the template and make the changes there. If you do not have editing privileges, you should notify the template publisher of your recommended changes.

If you need to update answers, you must reassemble the document using the saved answer file and make your changes during the interview. Make sure you save the answer file when you are finished.

Updating Cross-References in an Assembled Document

Problem

I've assembled a document and sent it to Microsoft Word, but now the Table of Contents is outdated. How do I update these cross-references?

Solution

To update cross-references in an assembled Word document

1. Highlight all of the text in the document (press **Ctrl+A** or choose **Select All (Edit menu)**).
2. Press the **F9** key.
3. Select your update options and click **OK**. Cross-references in the document are updated.

Viewing File Names Instead of Template Titles at Library

Problem

I'm looking for a specific template in my library. I know what its file name is, but am not sure how to find it based on its title. Is there some way to display templates by their file names in the item list?

Solution

To view items in the library by file name, choose **File Names (View menu)**. To show template titles again, choose **Template Titles**.

You can search a list of library items for a specific template by using the **Find** command. Simply select **Find** and then enter the text for which you are searching in the field. HotDocs will search both template titles and file names for the text you enter. Any files that contain that specific text will be displayed in the list.

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Corporate Offices

Head Office U.S.

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Contact HotDocs Sales and Support

HotDocs Corporation

387 South 520 West

Suite 210

Lindon, Utah 84042

Tel: 801-615-2200

Sales: 800-500-3627

Fax: 877-356-3627

info@hotdocs.com

HotDocs Limited

14 South Charlotte Street

Edinburgh, Scotland

EH2 4AX

Tel (UK): 0843 208 0704

Tel (Int'l): +44 131 226 3999

Fax: +44 131 220 9024

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Glossary

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.ANS: File name extension designating a HotDocs answer file. Traditionally .ANS designates a binary answer file, but starting with the release of HotDocs 2009, all answers files (even those with the .ANS file name extension) are saved in XML format. The .ANS file name extension is retained to ensure backwards compatibility with HotDocs 2008.

.ANX: File name extension designating a HotDocs XML answer file.

.CMP: File name extension designating a HotDocs component file.

.DOC/.DOCX: File name extension designating a Microsoft Word document. (See text document.)

.DOT: File name extension designating a Microsoft Word DOT template. (See text document.)

.HDA: File name extension designating a HotDocs auto-assemble file.

.HDI: File name extension designating a HotDocs auto-install file.

.HFD, .HPD: File name extensions designating HotDocs form documents -- .HPD designates a HotDocs PDF Form Document, and .HFD designates a HotDocs Form Document (based on the legacy Envoy file format).

.HFT, .HPT: File name extensions designating HotDocs form templates.

.PDF: File name extension designating a Portable Document Format file, a format created and supported by Adobe. PDFs are a useful way of distributing documents in a format most users can view—as long as they have Adobe Acrobat, Adobe Reader, or HotDocs Filler installed. Template developers can also create PDF-based form templates (.HPT files) from which PDF files can be assembled.

.RTF: File name extension designating a Word RTF (Rich Text Format) file, or a HotDocs RTF template. (See text template.)

.WPD: File name extension designating a WordPerfect document. (See text document.)

.WPT: File name extension designating a WordPerfect template. (See text template.)

A

accelerator: A key or key combination that quickly performs routine tasks in HotDocs. For example, rather than click the Print button, a user can press Ctrl+P and the document will be printed. Accelerators are useful when users don't want to use the mouse.

addendum: The last section of a form document that contains answers that don't fit in their allotted fields on the actual form. (See also overflow.)

additional text: See dialog element.

ADO: Short for ActiveX Data Objects, it's a data presentation layer that lets HotDocs communicate with a database so HotDocs can retrieve data from it and use it to assemble a document. (See also ODBC.)

ANS: File name extension that designates that the file is a HotDocs answer file. Starting with the release of HotDocs 2009, all answers files (even those with the .ANS file name extension) are saved in XML format. The .ANS file name extension is retained to ensure backwards compatibility with HotDocs 2008.

answer file: A saved file that contains the answers gathered by an interview. Often template developers save an answer file so they can reuse the answers later to assemble other documents to which the answers are pertinent.

Answer File Manager: The library used to manage answer files. With Answer File Manager, users can group answer files, view histories of their usage, and so forth. (The alternative is using Windows Explorer to find, view, and use answer files.)

answer library: See library and Answer File Manager.

answer management: The system of using Answer File Manager to store and manage answer files. (The alternative is using Windows Explorer to find, view, and use answer files.)

answer sharing: The process of creating and using same-named variables in multiple templates so that a user can use the same answer file to assemble multiple documents. (Can also be called variable flow-through.)

answer source: An answer file that is linked to a specific dialog in an interview. Users can enter their answers in an answer source and have those answers available to them on demand. (During an interview, a Select button appears on the dialog. The user clicks this button and has access to the answers in the answer source.)

Answer Summary: A brief report HotDocs generates that lists the questions asked during an interview, followed by the answers that were entered. (See also Question Summary.)

answer wizard: A button attached to a form field that users can click during direct-fill assembly. When they click the Answer Wizard button a pop-up interview appears, asking one or more questions that are required in order for an answer to be merged in the field. Frequently, answer wizards are assigned to inactive fields in a form.

answers: Data users enter during an interview. Answers are usually merged into the document, but sometimes they are used to calculate other answers that are used in the document. See also answer file.

ANX: File name extension that designates a HotDocs answer file.

ascend: The process of sorting answers in alphanumeric order, from 1 to 9, and from A to Z. (See also descend.) You can also sort items in a template library, clause library, and answer library.

ASK instruction: An instruction that forces a dialog to be asked at a specific location in the script or template. Frequently, ASK instructions are used when creating an interview component. They allow developers to control the order in which dialogs are asked during the interview.

assemble: See document assembly.

Assembly Queue: A dialog box that shows a list of assemblies—pending, current, and completed. Users can open the Assembly Queue by clicking Assembly Queue in the assembly window toolbar. It is most useful when users have selected multiple templates for assembly.

assembly window: The window that appears when a user selects a template to assemble. By default, it includes the Interview tab, the Document tab, the Question Summary tab, and Answer Summary

tab. Each of these tabs displays something unique about the document being assembled, such as the questions that are required to customize the document or the assembled document itself.

auto-assemble file: A self-executable file that contains one or more templates and their related files. When packaged in an auto-assemble file (or HDA), the files are temporarily extracted and used to assemble the document. Once assembly is complete, the extracted files are deleted. Auto-assemble files are useful if template developers don't want users to have editing access to the template files themselves.

auto-install file: A self-executable file that contains one or more templates and their related files. When extracted, the files are saved to disk and references to them are added to a library. Auto-install files provide a useful way to distribute templates or updates to template sets.

automate: The process of converting any document (text or form) into an interactive template. At its very core, automation is replacing changeable text in the document with variables. Additional automation steps include making text in the template conditional, repeating sections of the template so multiple answers can be entered, and inserting other boilerplate text into the template.

Automator: See HotDocs Automator.

B

bar code: A format for an answer or a group of answers so that data can be quickly scanned using an optical scanner. Bar codes are supported in both form templates and text templates. (In form templates, developers assign the PDF417 property to the field. In text templates, developers assign the preferred bar code font at the Advanced group of the Variable Field dialog box.)

binary files: In versions of HotDocs prior to HotDocs 2009, represents the format HotDocs-specific files—such as library files, component files, and so forth—were saved in. Binary file formats are common in most software applications. They allow information about the files to be encoded for storage and processing purposes. However, one limitation of storing information in HotDocs in binary format is that third-party application developers aren't able to inspect, edit, or otherwise make use of information contained in the files. Another limitation is that the binary formats used in HotDocs do not support the use of foreign characters (for example, international characters that are not represented in your computer system's default language).

browser: A window that allows users to view HTML documents. When working with HotDocs Server, interviews are displayed in a browser window rather than the regular HotDocs assembly window.

built-in variable: A predefined variable that performs a special function in a template, such as inserting either today's date or the name of the current answer file. Built-in variables include TODAY, PN#, ANSWER FILE NAME, and COUNTER.

C

century rollover: A HotDocs setting that controls whether years entered as two digits appear as 1900-century years or 2000-century years.

check-box field: A type of form template field that represents some sort of pre-existing option a user must select, such as a true/false value or a multiple-choice value.

- chevrons:** The double-angle brackets (« ») that surround a variable in a text template. Together, the chevrons and variable name make up the variable field, for example, «Client Name».
- child dialog:** A dialog that is inserted within another dialog. When it's inserted, it becomes linked to that dialog—users can't answer questions in it without first viewing the parent dialog. Usually the two dialogs are related in content or purpose.
- clause:** Predefined sections of text that can be selected and added to an assembled document. Usually clauses are grouped together in a clause library so users can choose which ones they want to insert, although some clauses are merged in the document automatically.
- clause archive:** A compressed file that contains all of the clauses for a given template or clause library. During assembly, clauses in the archive are extracted so they can be selected and added to an assembled document.
- clause library:** A file that contains a listing of available clauses. Users can select the clauses they want to use from the library, designate the order they should be merged in the document, and then answer any questions contained in the clauses. The clauses are then merged in the document.
- Cloud Services:** See HotDocs Cloud Services.
- CMP:** File name extension that designates that the file is a component file.
- command-line option:** An instruction used to control the operation of HotDocs. These instructions, or commands, are added to any command line that causes HotDocs to run. They can alter the operation of specific templates, or they can affect the overall operation of HotDocs.
- comments:** Notes or thoughts entered by the template developer either in a script or in a template. Comments are one way to document processes within the template. If entered correctly, they will not be visible to users in the assembled document.
- component:** A template resource file that displays or stores information about the user input/answers to merge in the final document. Examples of components include variables, dialogs, dialog elements, merge text groups, and formats.
- component file:** The file that stores all of the components used in a template. The component file and template file are both necessary for template development and document assembly to work correctly. Template developers use Component Manager to work with components.
- Component Manager:** The tool used to coordinate component usage in a template. Component Manager shows all of the components used in the template and provides options for working with those components.
- computation variable:** A type of component that performs calculations or executes other instructions within the template. Computation variable scripts are created using the HotDocs scripting language.
- conditional text:** Text in the template that should be included in the assembled document only under certain circumstances. Conditions are controlled using IF instructions and expressions.
- control field:** A type of form template field that is used for behind-the-scenes tasks, including inserting related templates and assigning values to variables, just to name a few.
- COUNTER:** An expression that keeps track of the current number of repetitions in a repeated dialog. Each time a new repetition is added, the COUNTER is increased.

custom interview: A script that controls how and the order in which variables and dialogs are asked during an interview. The template developer creates this script.

D

database: A file that contains a collection of data. Template developers can map variables in templates to fields in a database table so that answers can be retrieved from it and merged in the assembled document.

Database Connection: See HotDocs Database Connection.

date detection: The HotDocs setting that controls how HotDocs interprets and merges dates entered during the interview—for example, whether the date appears as DAY MONTH YEAR (British), or MONTH DAY YEAR (United States).

Date variable: A type of component that merges a date in the document.

DEBUG: An instruction developers can insert in a template or script that lets them troubleshoot problems they are experiencing with their automation. While testing the script or template in debugging mode, HotDocs walks the developer through it, step by step, so he or she can see exactly how the script or template is producing the unexpected result.

default interview: The interview HotDocs automatically generates based on the order variables are asked in the template.

default word processor: When multiple word processors (for example, Word and WordPerfect) or when multiple versions of a single word processor (for example, Word 2000 and Word XP) are installed, the word processor HotDocs uses by default for automation and document assembly.

delimiter: A character, such as a tilde (~) or vertical bar (|), that delineates answers or values in a script or instruction.

descend: The process of sorting answers in reverse alphanumeric order, from 9 to 1, and from Z to A. (See also ascend.)

detect: In a form template, the process of aligning a variable field with its surrounding field borders.

developer: See template developer.

dialog: In template development, represents the component in which the developer groups variables and other components. In document assembly, represents the group of questions in the Interview tab of the assembly window where users enter their answers.

dialog element: A component that lets developers more easily add additional text, hyperlinks, buttons, graphics, lines, and spacing to dialogs. These can help make the dialog more visually pleasing and informative.

dialog script: A set of instructions that dynamically change how variables are used in a dialog. For example, questions about a client's children can be scripted so they become available only if the client indicates that he or she has children. If the client does not, the questions will not be available.

direct-fill assembly: The process of entering answers directly at the Form Document tab of the assembly window rather than answering questions at the Interview tab.

DOC: File name extension that designates that the file is a Microsoft Word document. (See text document.)

document: The file that is created after a template has been assembled.

document assembly: The process HotDocs goes through as it processes scripts in the template and merges answers into the document produced from the template. At the end of the assembly process, the user has a document tailored to his or her needs.

document manager: A third-party application that stores various data files, including documents and answer files. Using a document manager, users can track versions and show histories of the document as well as enter other physical data about the files being stored, such as the date they were created, who created them, and so forth.

Document Preview tab: A tab of the assembly window that shows how the text document has been assembled using the answers entered in the interview. (See also Form Document tab and Interview tab.)

DOT: File name extension that designates that the file is a Microsoft Word DOT template. (See text document.)

dot code: A property that can be assigned to text in a prompt, dialog element, resource, or computation script that either formats the text or inserts characters not commonly supported in plain text. For example, dot codes can be used to apply a bold format to a word in a prompt, or they can be used to insert the subsection (§) symbol.

double-angle bracket: See chevrons.

driver: See printer driver.

duplicate: The process of copying a variable to create a new one.

E

Edit field: A type of form template field that is used for entering text, dates, and numbers. It is the most commonly used type of field on a form.

ELSE IF / ELSE: See IF instruction.

End of Interview dialog: The last dialog displayed in an interview, which contains a report of the number of questions that are still unanswered. It also provides options for working with the assembled document.

Envoy: A third-party product used for creating HotDocs form templates (or HFTs). Support for the Envoy printer driver ended with the release of HotDocs 2006 (Envoy required 16-bit compatibility, which was only supported on Windows 98 and earlier). HotDocs still supports automation of HFT files — just not creation of these files. All new form templates must now be created in PDF format.

example format: A predefined format for how an answer should look when it is merged in the assembled document. This allows the user to enter the answer however they want in the interview, but forces it to appear a specific way in the finished document.

explicit index: A reference to a specific answer in a list of answers. For example, to merge the third answer from a list, a template developer would assign the index number of [3] to the variable that is being merged, like this: «Service Date[3]». The third date in the list would then be merged.

expression: A command in a script that retrieves a special value. Expressions help calculate dates, sums, and so forth.

F

field: A place in the template that denotes where users' answers should be merged, or where a specific instruction should be executed. In a text template, a field is denoted by chevrons. In a form template, a field is denoted by a colored box that is overlaid on the form's static text.

file name extension: Three characters appended to a file name that identify the type of file so Windows knows what program to use to work with the file.

fill: The process of assembling a form document.

fill character: Character that is used to pad an answer that doesn't meet the required width of the field. For example, perhaps an answer needs to be 15 characters long. If the answer is only 10 characters, a fill character can be used to bring the answer to 15 characters.

fillable field: In Adobe Acrobat or Reader, represents a dynamic field in which a user can enter data while viewing the document. Using HotDocs, users can create fillable PDF templates from these PDF documents that contain fillable fields.

Filler: See HotDocs Filler.

filter: A script that removes unrelated or unwanted answers from a list of answers. For example, perhaps there is a list of a client's children but only the names of minor children should be merged. A filter can extract just this data from the list.

fixed value: A predefined answer, such as a date, number, or string of text. When working with instructions and expressions, placeholders are replaced either with fixed values or with variables.

foreign language DLL: A file that allows template developers and users to access Date variable and Number variable formats in languages other than English. This allows these dates and numbers to be formatted correctly in the assembled document. Supported languages include French, Spanish, German, Swiss German, Austrian German, Dutch, and Italian. From HotDocs 10 onwards, the functionality provided by the Foreign Language DLL's is integrated with HotDocs.

form document: The file that is created from an assembled form template. Form documents are distinguished from text documents by the design of the document—forms are static in nature, meaning the underlying text of the document cannot be changed or modified. (See also text document.)

Form Document tab: A tab of the assembly window that shows how the form document has been assembled using the answers entered in the interview. When viewing the Form Document tab, users can enter or change their answers by clicking on the form fields and changing the answer.

form template: A template that is created and automated in HotDocs Automator. It is distinguished from a text template by the fact that the underlying text cannot be modified because it is static. (See also form document.)

form wizard: See custom interview.

format example: See example format.

function: In programming, a function is a piece of code that operates on one or more inputs, and produces an output.

G

GRAY: An instruction used in a dialog script to disable a variable unless the user answers another variable a specific way. For example, questions asking for children's name can be grayed until the user answers a question indicating he or she has children. (See also UNGRAY.)

group: The process of designating that two or more fields in a form template be linked together so that an answer can flow from one field to the next. For example, if a text answer needs to span two or more lines in a form, the fields can be created on each line and then grouped. When the answer extends beyond the first line, it will flow to the second line. (See also run-on group.)

H

HDA: File name extension that designates that the file is a HotDocs auto-assemble file.

HDI: File name extension that designates that the file is HotDocs auto-install file.

HFD, HPD: File name extension that designates that the file is a HotDocs form document.

HFT, HPT: File name extension that designates that the file is a HotDocs form template.

HIDE: An instruction used in a dialog script to hide variables in the dialog. (See also SHOW.) Usually this instruction is conditioned so that questions in the dialog hide and show dynamically, based on answers the user enters.

host application: A (usually third-party) web application that "hosts" HotDocs Server or Cloud Services features on the back end to present interviews to end users in a web browser. A host application enables template (and related file) uploading and storage, as well as interview generation and presentation, final document assembly, and answer file handling and storage.

HotDocs Automator: The tool used to automate form templates, or those templates whose underlying static text cannot be changed. Examples of form templates include tax preparation forms, applications, and so forth.

HotDocs Cloud Services: The cloud-based version of HotDocs that displays interviews and your customers' final assembled documents within a web browser. HotDocs Cloud Services does not require end-users to install any HotDocs software on their computers.

HotDocs Compare: Starting with the release of HotDocs 2009, HotDocs Compare is no longer available. A HotDocs add-in tool that is used to compare different versions of an assembled document. Using HotDocs Compare, users can take a "snapshot" of an assembled document, change some answers in the interview, and then compare the two versions.

HotDocs Database Connection: A tool that provides the mapping needed to connect templates to a database. Answers can be retrieved from the database during the interview, which keeps users from manually having to enter their answers. (Starting with the release of HotDocs 2008, HotDocs Database Connection (the separate product) was fully integrated into all editions of HotDocs.)

HotDocs Debugger: A tool used to systematically step through a script or template in order to examine how the script or template produced the result it did. The Debugger is typically used when the

result is unexpected—it helps a template developer pin-point exactly what is happening so he or she can correct the problem creating the error.

HotDocs Developer: A version of HotDocs that contains the tools necessary to automate a simple to highly complicated set of both text and form templates. It is also used to assemble both text and form templates. (See also HotDocs Developer LE.) Prior to the release of HotDocs 10, Developer was named Professional Edition.

HotDocs Developer LE: A version of HotDocs that contains the tools necessary to automate a simple to moderately complicated set of text templates. HotDocs Developer LE can also be used to assemble text and form documents. (See HotDocs Developer.) Prior to the release of HotDocs 10, Developer LE was named Standard Edition.

HotDocs Filler: The application used to view assembled form documents.

HotDocs Options: A section of the software where template developers and end users can set their preferences for working with HotDocs.

HotDocs Outliner: A tool that generates an outline of scripting in a Word template. This outline can include just a list of instructions used in the template, or it can include variables as well. Items in the outline appear in the same order as they are used in the template. Viewing this outline may help developers better understand the logic used in the template.

HotDocs PDF Advantage: A HotDocs add-in that allowed the creation and automation of PDF-based form templates, as well as the ability to save most types of documents as PDF (assembled or otherwise). From HotDocs 10 onwards, this is no longer a separate add-in, but is instead fully integrated into HotDocs.

HotDocs Player: A version of HotDocs that is used for assembling published (and registered) templates. HotDocs Player functions differently to HotDocs User, which can assemble any template created by HotDocs Developer. For more information, see HotDocs User.

HotDocs Player Edition: A version of HotDocs that is used for assembling published (and registered) templates.

HotDocs Professional Edition: Please see HotDocs Developer.

HotDocs Server: The web-based version of HotDocs. Interviews generated by HotDocs Server are presented in a user's web browser. Answers are then sent back to HotDocs Server so final documents can be assembled by merging the interview answers with the non-changing template text. HotDocs Server enables users to create documents and answer files without requiring them to install HotDocs on their desktop.

HotDocs Standard Edition: Please see HotDocs Developer LE.

HotDocs User: A version of HotDocs that is used for assembling any templates created using HotDocs Developer. HotDocs User functions differently to HotDocs Player, which can only assemble registered templates. For more information, see HotDocs Player.

I

IF instruction: A set of instructions and expressions that control the inclusion and exclusion of optional text in a document. IF instructions are based on either True/False variables or true/false

expressions. IF instructions can also be used to control whether certain instructions or expressions are processed in computation or dialog scripts.

import: When working with libraries, the process of copying template files into the currently viewed library. These files can be imported for assembly only or for editing and assembly. When working with answer files, the process of copying an answer file to the default Answers folder and then adding it to the answer library.

inactive field: A form document field on which the user cannot directly enter an answer. Fields can be inactive for any number of reasons. For example, the field may be conditioned or it may contain a Computation variable. Frequently, a template developer provides an answer wizard to help the user answer all of the questions that will make the field active.

infinite loop: The process of a HotDocs script repeatedly reprocessing itself until HotDocs stops responding. For example, a computation can repeatedly scan a text string, character by character, for a specific value. As HotDocs searches for this value, it adds information to what is called the processing stack. If too much information gets added to this stack, HotDocs may get into an infinite loop and stop responding.

INSERT instruction: An instruction that inserts one template into another. For example, if boilerplate text needs to be used in multiple documents, a template An instruction that inserts the contents of one template into another. For example, if you have boilerplate text you need to use in multiple documents, you can create a template that contains that text and use the Insert instruction in each template that requires the boilerplate text to insert that content. This way, if you need to make a change to the text, you only need to update one template.

inserted dialog: See child dialog.

inserted template: A template whose contents you insert into another template's document assembly process using an INSERT instruction.

instant update: A command in the HotDocs assembly window that, when selected, updates the interview every time a user enters or changes an answer in the interview. Sometimes this updating may cause HotDocs to behave sluggishly as users move between answer fields. In such cases, the user can turn the instant update command off. Then HotDocs will update the interview only as it needs to.

instruction: A command in a script or template that performs a special task, such as inserting a template or asking a dialog at a specific place in the interview.

intake interview: See interview template.

interview: A series of dialogs, each containing one or more questions which HotDocs generates from the variables you add to your template. The template's user must answer the questions in the interview before HotDocs can assemble a custom document. You can view the interview by clicking the Interview tab of the assembly window. The left pane of the assembly window displays an outline of the interview. As the user answers questions, the outline tracks the user's progress through the interview.

interview component: A computation script that defines how a custom interview will look and function. An interview component usually includes ASK instructions to ask all of the dialogs/variables in the interview. The script frequently includes other instructions, such as REPEAT instructions and INSERT instructions as well as conditions for using these instructions. The name of this component is defined at the Component File Properties dialog box.

interview outline: The leftmost pane of the assembly window that lists all of the dialogs in the interview. Viewing the outline shows the natural progression of the interview. Icons in the outline also indicate whether questions in the associated dialog are completely answered, partially answered, or not answered at all.

Interview tab: A tab of the assembly window that shows the outline of questions in the interview as well as the dialogs that contain the questions. Users enter answers while viewing the Interview tab. (See also interview.)

interview template: A template that contains a series of interview questions designed to gather information about a person (or persons) or matter. Answers are saved in an answer source file, which can then be linked to a dialog in a template that requires the same information. Generally, interview templates can be used to create a list of possible answers so users have more options to choose from

iteration: One instance of a repeated dialog.

J

JS files: Stands for JavaScript files, which are used to display interviews in a Web browser. When templates are published for use with HotDocs Server, HotDocs generates these JavaScript files for the interview.

K

keywords: A broad term used to describe scripting instructions, expressions, and operators. Keywords are used in a script and generate values or perform certain tasks.

L

label: In a text template, an identification assigned to a REPEAT, IF, or SPAN instruction to help the template developer identify the instruction in relation to other instructions in the template. In a form document, the text that is merged in a field when an answer overflows and is sent to the addendum. (See also reference.)

layout: The placement of variables in a dialog. This appearance is controlled at the Layout tab of the Dialog Editor.

library: A window used to display and organize templates. The library does not store the actual files—instead, it contains shortcuts (or links) to the files, which are stored on disk. In addition to the template library, HotDocs also uses an answer library, which is more commonly known as Answer File Manager.

LIMIT instruction: An instruction that controls the number of iterations in a repeated dialog. For example, if a dialog should be repeated only four times, a repeat LIMIT of 4 can be assigned to the dialog.

line break: A code in a Word document that indicates that text should appear on a new line within the same paragraph. For example, if the user must enter separate lines in a single paragraph (such as lines in an address), a line break should be used. (See also paragraph mark.)

linked field: Represents a HotDocs field in a fillable PDF template that is associated with an Adobe fillable field. By creating this association between a HotDocs field and a fillable field, template developers can create HotDocs fields that precisely match fields in the underlying PDF. Users who assemble the document can then edit answers associated with linked/fillable fields in the saved PDF.

list: Two or more answers to one question merged in the document.

M

manual index: See explicit index.

map, mapping: See variable mapping.

mark up, markup: The formatting applied to a Word template or an assembled Word document that shows simplified template development marks. For example, when viewed in Markup View, variables in a template appear between brackets rather than chevrons. (See also Markup View.)

Markup View: A view that shows a simplified version of a Word template or an assembled document. This simplified view may be useful if a non-HotDocs user must review the template or document. When viewing a template or document in Markup View, variable and answer fields are marked using brackets.

merge: When HotDocs pulls an answer from the answer file into the document during assembly.

merge field: During template development, the place in the template where a variable is inserted. During document assembly, the place where the user's answer will be inserted.

merge text: The text that will be merged in a document if a user chooses a specific Multiple Choice variable option. For example, if a user chooses Male as the option, a masculine pronoun such as he or his can be merged instead of Male.

model: A tool in the script editor that template developers can use in writing scripts. A model shows the full instruction or expression—including any placeholders that must be replaced for the script to work correctly. Developers can drag these models from their respective lists and then replace the placeholders with the appropriate values.

Multiple Choice variable: A type of component that merges a predefined answer in the document.

N

navigation bar: In an interview (at the Interview tab), the toolbar used to move from dialog to dialog. In a document (at the Document tab), the toolbar used to move between merged answers in a document.

nested repeat: A repeated dialog that is nested within another repeated dialog.

non-breaking space / hyphen: A property that can be assigned to a variable that keeps the answer from being split across two lines in the assembled document.

notation: An identification assigned to a variable name to help identify what type of variable it is. For example, Client Name TE would indicate that the variable is a Text variable. (Typical component notations include TE (Text), DA (Date), NU (Number), MC (Multiple Choice), TF (True/False), CO (Computation), and DI (dialog).)

Number variable: A type of component that merges a numeric value in the document.

O

ODBC: Short for Open Database Connectivity, it's a data presentation layer that lets HotDocs communicate with a database so HotDocs can retrieve data from it and use it to assemble a document. (See also ADO.)

operator: A symbol or word that causes either an operation (such as addition) or a comparison to be performed in a computation script or expression.

order: The process of designating the sequence in which form template fields are asked in the tab order. Establishing this order in a form is important for users who directly fill the form document.

outline: See interview outline.

overflow: Answers in a form document that do not fit in the allotted field space. Overflowing answers are usually sent to the addendum.

overlay: The process of using the Overlay Answers command to merge existing answers into the current answer file. When answers are overlaid, the answers become a part of the current answer file. They also overwrite any existing answers in the interview.

P

paragraph mark: A code in a Word document that indicates that text following the mark should appear in a new paragraph. (See also line break.)

parent dialog: A dialog that contains a child dialog.

pattern: Determines how a Text variable will be displayed and formatted in the interview and in the assembled document. By default, HotDocs includes three patterns in all new templates (Social Security number, telephone number, and time of day), but template developers can create custom patterns.

PDF: File name extension that designates that the file is a Portable Document Format file, a format created and supported by Adobe. PDFs are a useful way of distributing documents in a format most users can view—as long as they have Adobe Acrobat, Adobe Reader, or HotDocs Filler installed. With HotDocs, template developers can also create PDF-based form templates. They can also create PDFs from assembled documents.

PDF417: The two-dimensional bar code format used in HotDocs Automator and HotDocs Filler.

Personal Information variable: A type of component that stores basic information about a user, such as a name, a company name, and a phone number. This information is saved in the Current User key of the Windows System Registry. Once answered, users won't be prompted to enter it again.

pick list: See answer source.

placeholder: A marker in an instruction or expression model that indicates where a value must be substituted. This value must be a literal value or a variable. Instruction and expression models help the developer use the correct syntax in a script.

pointed component file: When sharing components across multiple templates, represents the template's own component file, which, in turn, points to the shared component file.

pop-up interview: A dialog a user can display during an interview. Usually a pop-up interview shows a different view of the dialog. For example, if a user is entering answers in a spreadsheet, he or she can click the Edit Row button and a pop-up interview appears that shows just the questions (and answers) from that particular row in the spreadsheet.

printer driver: A driver that generates form templates from files designed in other applications, such as a draw program or a word processor. HotDocs includes one printer driver—the HotDocs PDF driver.

processing stack: A sequential list of templates and components HotDocs is processing at any given time. Each time a new component is processed, it is added to the stack. (Once processing is finished, it is removed.) In some instances where recursion is used in a script, the same component is repeatedly added to the list. If the number of components exceeds the stack limit, an infinite loop error will occur. (The stack limit can be changed at the Component File Properties dialog box.)

prompt: Text that can be assigned to a variable to help the user better understand how to answer the question.

publish: The process of generating files for distribution to other users. Types of files that can be published include auto-assemble files, auto-install files, regular templates, and HotDocs Server files. During publishing, protection options can be assigned to help safeguard the templates.

Publishing Wizard: The tool used to publish template files for others. The Publishing Wizard steps through the publishing process and allows different properties to be set, depending on the type of file(s) that are being published.

punctuate: The process of formatting a REPEAT instruction so that a list of answers will appear in sentence format, like this: The client owns real estate in New York, Pennsylvania, and Montana. (New York, Pennsylvania, and Montana are the list items. The punctuation adds the commas and the conjunction and).

Q

Question Summary: A brief report HotDocs generates that lists questions asked during an interview. The summary includes blank lines for handwritten answers. (See also Answer Summary.)

queue: See Assembly Queue.

R

reference: In a form document, the text that is added to the addendum to identify any overflow answers. (See also label.)

reference path: A folder path for a template in which the drive letter and some or all of the folder names are represented by a keyword. At runtime, this keyword is mapped to an actual path on the user's computer so that when the user accesses the template, the keyword is replaced by the path. This allows templates saved in one central location to work on multiple workstations regardless of how the drives on the workstation are mapped.

register: The process of publishing a template for use with HotDocs Player.

REPEAT instruction: An instruction that repeatedly asks the same variable(s) so that users can provide two or more answers for a given question. REPEAT instructions are used to create lists of answers in the document.

repeated dialog: A dialog that contains the variables that need to be repeated so that multiple answers can be entered. (See REPEAT instruction.)

repeated series dialog: One of two representations of a dialog that is repeated. With a repeated series, the dialog is asked repeatedly until all answers in the list have been entered. (See also spreadsheet dialog.)

resource: Supplemental help that can be included with a variable or dialog to help users better understand how to answer the questions they are viewing. Resources appear in the resource pane of the assembly window.

Resource field: A type of form template field that functions like a hyperlink. Link fields let users get help while direct-fill assembling the form document. Links are displayed as underlined, colored text, much like links in a Web browser. They provide a resource for the form in general, instead of for a specific variable or dialog.

RTF: File name extension that designates that the template file is a Word RTF file. (See text template.)

run-on group: A series of form template fields that have been grouped and associated with each other so that the answer can flow from one field to the next. For example, if an answer must fill two or more lines on a form, separate fields can be created on each line and then grouped. Once grouped, they become a run-on group.

S

script: One or more instructions and/or expressions that generate a value or execute some kind of procedure.

script editor: The tool used to write a script. The script editor includes several options to make the script-writing process easier, including color-coding, auto-complete lists, and a toolbar for completing other tasks.

selection grouping: A dialog property assigned to True/False variables, clauses, and child dialogs which presents these options as check boxes (multiple-select) or option buttons (single-select).

Send to Word Processor command: A command that opens the word processor and copies the assembled document into it. Once opened in the word processor, the user can make any changes necessary to the document.

set:

SET instruction: An instruction in a template or script that assigns a value to a variable. Variables that have their values set should not be asked again in the interview.

shared component file: A common component file to which several related templates are linked. To use a shared component file, the template's own component file must be pointed to the shared file. Changes to components in the file are reflected in all templates that use it. (See also pointed component file.)

SHOW: An instruction used in a dialog script to show variables that have been hidden in the dialog. (See also HIDE.) Usually this instruction is conditioned so that variables hide and show dynamically, based on answers the user enters.

sort: The process of alphabetizing answers in a repeated list or items in a library. Sorting can be done in ascending or descending order.

spreadsheet dialog: One representation of a repeated dialog. Each row in a spreadsheet represents one repetition in a dialog. (See also repeated series dialog.)

spreadsheet-on-parent dialog: A repeated child dialog that appears as a spreadsheet on its parent dialog. This allows the user to view both dialogs at once.

static text: The underlying text in a form template or document that does not change. To enter answers on a form, form fields must be created and overlaid on the static text.

strike-through field: A type of form template field that is used for crossing out static text on the form.

summary: See Question Summary and Answer Summary.

supplemental component: A term used to define components such as patterns, example formats, dialog elements, and merge text. Supplemental components are associated with regular components, but they can be created and edited as standalone components.

syntax: The language used in writing scripts. For a script to work properly, the script must be written in a way that HotDocs can understand. This language consists of instructions, expressions, operators, and values (such as text, numbers, dates, or answers users enter).

T

template: A word processor or form document that has been converted to HotDocs format so that it can be automated. When in template format, changeable text in the template can be replaced with variables. Other instructions can be added as well, such as instructions that create lists, condition text, and insert other templates.

template developer: The person responsible for automating your firm's templates. The template developer creates and inserts the variables in the template, arranges variables in dialogs, and performs other custom tasks in the template. (See also user.)

template development: See automate, automation.

Template Manager: The tool used to manage a library of templates and their associated components. This includes converting or renaming templates, copying and pasting components across multiple templates, renaming components, and changing component file properties for multiple templates.

test: The process of testing a variable or other component to make sure it looks right and works correctly.

test assemble: The process of assembling a document for the purpose of ensuring the interview works correctly and the automation within the template produces a correctly assembled document. During a test assembly, developers can easily edit components and have the test assembly window updated with changes.

text document: A document that is viewed in either Word or WordPerfect. It can represent a document before it is automated as well as a document after it has been assembled. When in document format, it is not associated with (or linked to) HotDocs in any way. (See also text template.)

text template: A template that is created and automated in Microsoft Word or WordPerfect. It is distinguished from a form template by the fact that the underlying text of the template can be modified. (See also text document.)

Text variable: A type of component that merges text in the document.

thumbnail: Small images of each page in the form template. Developers can use thumbnails as a way to see an overview of the template. Thumbnails can also be used to move around quickly in a form.

title: A property of a variable or dialog that specifies a more user-friendly name for the component. For example, if project standards require components be named using notations, names like Employee Name TE may not make sense to a user. However a title like Employee Name can be used instead.

True/False expression: A script that must result in either true or false. Expressions are used for merging or excluding optional text in a document. They are also used for determining which parts of a script will be executed, based on answers or other values entered by a user. Expressions are often used when a simple True/False variable doesn't convey the condition needed. (See IF Instruction.)

True/False variable: A type of component that determines a true/false status of some condition and then merges the appropriate answer or text.

U

unanswered text: Text in a text document that indicates that a question is unanswered. By default, unanswered questions appear as *****Variable Name*****, but this can be customized.

UNGRAY: An instruction used in a dialog script to enable a variable that has been grayed based on a user's answers. (See also GRAY.)

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

upload: The process of moving HotDocs files to a server so they can be accessed via an intranet or Internet site.

user: The customer, client, or person who assembles documents from templates. (See also template developer.)

V

value: In an interview, it represents a user's answer. In a script, it represents data that must be used in executing the script. (The value can either be a literal value or a user's answer.)

variable: A component that is used to represent changeable text (such as names, dates, numbers, etc.) in the template. Types of variables include Text, Date, Number, True/False, Multiple Choice, Computation, and Personal Information.

variable field: A place in the template that denotes where an interview answer merges with the template's non-changing text. At assembly, HotDocs merges interview answers into the variable fields that represent corresponding variables. In a text template, a variable field is enclosed by chevrons.

variable flow-through: See answer sharing.

variable mapping: The process of associating two HotDocs variables so that they can share answers. In some cases, this mapping defines the relationship between a HotDocs variable and a field in a third-party application file, such as a database table or a field in an Outlook Contacts list.

W

warnings: A list of cautions that appear in the test assembly window that indicate problems created by scripting in the template.

wizard: See answer wizard.

WPD: File name extension that designates that the file is a WordPerfect document. (See text document.)

WPT: File name extension that designates that the file is a WordPerfect template. (See text template.)

X

XML: Stands for eXtensible Markup Language. It 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 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.) In HotDocs, you can save libraries, component files, and answer files in XML format.

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