HotDocs Template Portal 11

User Guide

Sample Templates and Forms

This product includes sample templates and forms only. Using them may have significant legal implications in some situations, and these implications vary by state and depending on the subject matter. Before using these templates and forms or adapting them for your business, you should consult with a lawyer and financial advisor.

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Table of Contents

Section 1: Getting Started

About HotDocs Template Portal

What is HotDocs Template Portal?

HotDocs Template Portal is an out-of-the-box host application for HotDocs Server that provides an intuitive and secure Web interface for assembling documents from HotDocs templates. It includes the following features:

- **User Authentication and Access Control:** Template Portal's secure environment allows you to manage user access to templates, template sets and answer files.
- **Template Uploading:** You can publish your templates directly from HotDocs Developer. HotDocs Template Portal recognizes published templates and uploads them directly into the database.
- **Template Management:** You can create groups of templates for specific needs within your organization. You can also give users access to templates or answer files directly from Template Portal.
- **Answer File Management:** You can store answer files on the server and share answer files with other users within your organization. You can also upload existing answer files from the desktop to the server, and download answer files from the server to the desktop for offline management.

Section 2: Assembling Documents Using Template Portal

Descriptions of Template Portal Pages

This section contains descriptions of pages used by non-administrative users.

Home (Select Template) Page

This page lets you choose a template to begin assembling a new document. The **Items per page** drop-down list allows you to select how many templates are displayed per page. If templates are located on additional pages, you can click a page number to view additional templates. To help you find a specific template, you can sort the list by clicking the **Title** or **Description** column headings. The **Search** box can also help you find a specific template if you know a word or phrase in its title or description.

Tip: Click the Home button at any time while logged on to HotDocs Template Portal to return to this page.

To search for a specific template

In the **Search** box, type some of the text that is in the title of the desired template. The template list changes to show only the templates that contain the text you typed.

Select Answer File Page

The **Select Answer File** page (**Select Template > Select Answer File**) lets you choose whether to create a new answer file or use an existing file. After you complete the interview, you can then save your answers for use when assembling other documents.

To create a new answer file

1. Select **Begin using a new, empty answer file**.
2. Click **Continue** to display the HotDocs interview.

To use an existing answer file from your computer

1. Select **Use a HotDocs answer file from my PC**, then click the **Browse** button to locate an existing answer file on your computer.
2. Click **Continue** to display the HotDocs interview.

To use an existing answer file from the server

Select an answer file from the list of answer files stored on the server by clicking on the link name. (Use the Search box to find answer files containing specific text in the title or description.)

Complete Interview Page

The **Complete Interview** page (**Select Template > Select Answer File > Complete Interview**) gathers the answers required by the template to assemble a document. To help you answer the questions, the interview window is divided into three panes:

- Interview Outline: Provides an overview of the questions you must answer
- Dialog Pane: Displays the specific questions
- Resource Pane: Provides helpful information to assist you in answering specific questions or dialogs

Interview Outline

The interview outline lists all of the dialogs (or groupings of questions) in the interview and allows you to quickly move to any dialog in the interview you need. When you click the name of a dialog in the outline, the dialog appears in the dialog pane so you can answer questions in it.

The following icons are used in the interview outline to show the answered status of questions in each dialog, which can help you determine which dialogs contain questions you still need to answer:

	None of the questions in the dialog are answered.
	A new repetition of a repeated dialog in which none of the questions are answered.
	At least one of the questions in the dialog is answered.
	All required questions in the dialog are answered.
	The dialog contains at least one unanswered required question.
	The dialog contains at least one unanswered required question.

These icons and the list of dialogs in the interview outline are updated dynamically as you answer questions in the interview. Sometimes, especially when assembling large or complex documents, the time it takes to update the outline may noticeably slow down the interview. For example, it may take a few seconds to move from question to question within a dialog. You can change the interview speed by clicking the Enable/Disable Instant Update button. When Instant Update is enabled, the interview is updated as you move between answer fields; when it is disabled, the interview is only updated when you move between dialogs.

By default, the interview outline appears to the left of the dialog pane, but you can change its width or position as needed:

- To change the width, drag the border separating the interview outline and dialog pane to the desired width.

- To close the interview outline, click the **Close** button in the upper right corner of the interview outline. (To show it again, click the **Interview Outline** tab on the left side of the interview.)

Some options may not be available in all situations. For example, template providers may require that Instant Update always be enabled, or they may choose not to allow you to view the interview outline.

Dialog Pane

Questions you must answer are presented in dialogs. Some questions appear repeatedly--either as a series of dialogs or as a spreadsheet. This allows you to enter multiple answers for a single question, thereby creating a list of answers. Finally, some questions appear in a nested dialog. Nested dialogs usually represent questions that are either dependent on or related to questions in the main dialog. They usually appear as an icon directly on the main dialog, but they can also appear as a spreadsheet on the main dialog.

The following table shows how to navigate through dialogs and answer various types of questions:

To	Do This
Answer text fields	Enter your answer in the text field.
Answer check boxes or option buttons	Either select the check box using the mouse, or press the space bar.
Answer dates	Click the **Calendar** button and choose a date from a calendar. You can also enter the letter T for today's date or enter a date in one of the following formats: 6/3/90, 06/03/1990, June 3, 1990, 3 June 1990, and so forth.
Answer questions when the dialog is asked repeatedly	Answer all the questions in a dialog, clicking **Next** to get to each repetition. When you are finished entering all of the different sets of answers, click **Next** at a dialog without any answers.
Answer questions in a repeated spreadsheet	Enter each set of answers on a its own row in the spreadsheet. To edit a row of answers, click **Edit Row**. To insert a new row between existing sets of answers, click **Insert Row**. To remove a set of answers, click **Delete Row**.
Answer questions in a nested dialog	Click the dialog icon. When you finish answering its questions, you can either click the Next button in the navigation bar or click the main dialog in the interview outline.
Go to the next or previous dialog	Click either the Next button or the Previous button. (You can also press **Page Down**/**Page Up** or **Alt+N**/**Alt+P**.)

To	Do This
Go to the next dialog or the previous dialog that contains an unanswered question	Click either the **Next Unanswered Dialog** button or the **Previous Unanswered Dialog** button. (You can also press **Ctrl+Page Down**/**Ctrl+Page Up**.)
Go to the first or the last dialog in the interview	Click either the First button or the Last button. (You can also press **Alt+R**/ **Alt+L**.)
Finish the interview	Click the Finish button.
Save Answers	As you answer questions during the interview, you may want to save your answers in an answer file. To do this, click **Save Answers**. You will then be prompted to enter the information required for saving the file.
Preview Assembled Word Documents	If you are assembling a Word document, you can preview the document at any time during the interview. To do this, click the **Document Preview** button. To return to the interview to continue answering questions, click **Back to Interview**.

Resource Pane

Sometimes, the template provider includes resource text (or information) that can help you answer questions in a dialog. For example, reading a relevant statute may help you know how to answer a particular question. When resource text is available, it appears in the resource pane, which is located just below the dialog pane.

To show or hide the resource pane, click the **Show/Hide Resource Pane** button. When the resource pane is shown, you can see resource text for the current question in the dialog. (If a question does not have resource text available, the resource pane is empty.) In addition, you can click the **View Resource** button next to any question with resource text to view its resource text in a separate window.

Note

The resource pane may not be available in all situations. For example, template providers may choose to permanently hide the resource pane for a template.

Save/Download Page

The **Save/Download** page (**Select Template > Select Answer File > Complete Interview > Save/Download**) lets you save your answers and assembled document when you complete an interview.

Note

If you did not finish answering all of the questions in the interview, click **Return to Interview** to go back to the interview and enter the missing information. Questions requiring answers to complete the document are marked in red.

To save your answers on the server

1. Click **Save Answers**. The **Save Answer File** dialog box appears.
2. Enter an **Answer File Title** and **Answer File Description** for the answer file.
3. Click **Save**. The answer file is saved on the server.

Note

To make a copy of an existing answer file and assign it a new name, click **Save Copy**.

To save your answers locally (on your computer)

1. Click **Download Answers**. The **File Download** dialog box appears.
2. Click **Save**. The **Save As** dialog box appears.
3. Choose a folder where the answer file will be saved, specify a new file name if desired, then click **Save**. The answer file is saved to your local computer.

To download the assembled document

1. Click **Download** for the document you want to download. The **File Download** dialog box appears. (Optionally, if assembling a Word document, select PDF to download the assembled document in PDF format before clicking Download.)
2. Click **Save**. The **Save As** dialog box appears.
3. Choose a folder where the document will be saved, specify a new file name if desired, then click **Save**. The document is saved to your local computer.

Note

If multiple documents are generated by the template set, a message indicates how many interviews will be presented to complete the document set. Click **Next Interview** to proceed to the next interview.

View User Profile Page

The **View User Profile** page (**Manage > My Profile**) lets you view or edit your user information. For example, you can change your password or view the user groups to which you belong.

The following information may only be viewed (not modified) at the **View User Profile** page:

- User Role
- Group Membership

The other information, **E-mail** and **Password**, may be changed as described below.

To change your First or Last name

1. Enter a new name in the relevant name box.
2. Click **Save**. The name is saved and the **Home** (**Select Template**) page appears.

To change your e-mail address

1. Enter a new e-mail address in the **E-mail** box.
2. Click **Save**. The address is saved and the **Home** (**Select Template**) page appears.

To change your password

1. Enter your new password in the **Change Password** box.
2. Re-enter your new password in the **Verify Password** box.
3. Click **Save**. The new password is saved and the **Home** (**Select Template**) page appears.

Answer File Management Page

The **Answer File Management** page (**Manage > My Answers**) lets you manage answer files stored on the server. For example, you can edit the title or description of an answer file, upload an answer file to the server from your local computer, or delete an answer file from the server.

To help you find a specific answer file, you can sort the list by clicking the **Title**, **Description**, **File Name**, or **Last Modified** column headings. You can use the **Search** box to find a specific answer file if you know a word or phrase in its title or description. The **Items per page** drop-down list allows you to select how many answer files are displayed per page. If answer files are located on additional pages, you can click a page number to view additional answer files.

To edit answer file properties

1. Click **Edit** for the answer file you want to edit. The **Edit Answer File** dialog box appears.
2. Enter a new **Answer File Title**, **Description**, or **File Name**.
3. Optionally, select the user groups with which you want to share the answer file.
4. Click **Save**. The answer file properties are saved.

To upload an answer file to the server

1. Click **Upload Answer File**. The **Upload an Answer File** dialog box appears.
2. Click the **Browse** button. The **Choose file** dialog box appears.
3. Select the answer file you want to upload to the server, then click **Open**. The answer file name and path is inserted in the **Choose answer file to upload** box.
4. Enter an **Answer File Title** and **Description**.
5. Optionally, select the user groups with which you want to share the answer file.
6. Click **Save**. The answer file is uploaded to the server and added to the list of answer files.

To download an answer file from the server

1. Click **Download** for the answer file you want to download. The **File Download** dialog box appears.
2. Click **Save**. The **Save As** dialog box appears.
3. Choose a folder where the answer file will be saved, then click **Save**. The file is saved to your local computer and the **Download complete** dialog box appears.

To delete an answer file from the server

1. Click **Delete** for the answer file you want to delete. A dialog box appears which asks if you are sure you want to delete the answer file.
2. Click **OK**. The answer file is deleted and removed from the answer file list.

Contact HotDocs

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