

# **Workspace User Help File**

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# HotDocs Workspace Help File

This Help file contains information you need to use HotDocs Workspace.

The HotDocs Help window is divided into three parts – the navigation bar along the top of the help window, the main help content pane to the right, and the Contents, Search and Glossary pane to the left.

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# Getting Started with Workspace

## What is HotDocs Workspace?

HotDocs Workspace is an online application you can use to produce and manage forms and documents. You access HotDocs Workspace using a web browser, where you can select a document template, supply information to populate the template, and download the completed document. Workspace saves the completed document and allows you to update or download the document at a later date.

## Getting Started with Workspace

HotDocs Workspace is an online application you can use to produce and manage forms and documents. You access HotDocs Workspace using a web browser, where you can select a document template, supply information to populate the template, and download the completed document.

To begin using this guide, it is necessary for Workspace Administrator to provide login details and assign you to a Group.

### To access Workspace

1. Open your web browser and enter the address of Workspace as provided by Workspace Administrator.
2. At the login screen, enter your username and password and click **Log In**. Optionally, check **Remember Me** for Workspace to remember your username and password.

For security reasons, use of the **Remember Me** option is not recommended when accessing Workspace with a public computer.

Next Topic 

## Web Browsers

To access Workspace, users must have a compatible web browser installed.

	Internet Explorer	Firefox	Safari	Chrome
Version	Version 8 and later	Version 2 and later	Version 3 and later	Version 5 and later
JavaScript	Yes	Yes	Yes	Yes
Silverlight	Yes	Yes	Yes	Yes



# Overview of Workspace

## Home Page: Overview

The Home Page is the main interface to Workspace. It provides a list of active [work items](#), the ability to create and edit work items, and search functions. The Home Page contains the following elements:

1. **Authentication Status bar** — shows the user currently logged in to Workspace. This also provides links to:
  - i. **Logout** — clicking this link logs the current user out of Workspace.
  - ii. **Change Password** — clicking this link opens the Change Password page.
2. **Navigation Toolbar** — lists the main sections of Workspace. Click on a link to navigate to that section. Workspace shows the name of the currently displayed section in blue text.
3. **My Groups drop-down list** — used to categorise work items. Click on a tab to navigate to that Group. The Administrator can customize group names. Within each Group are the functions:
  1. **Quick Search** — searches the items in the selected group using the entered search terms.
  2. **Create a Work Item** — shows a list of all available templates. Click on a template in the list to start creating a new work item.
4. **Item list** — displays a list of all work items in the selected group.

## Interviews: Overview

By providing answers to the questions in the interview, Workspace is able to create a custom document using those answers and the template you previously selected. Once you have completed the interview, Workspace saves this document and it becomes available for download.

A HotDocs interview is a series of dialogs, each containing one or more questions. Workspace creates a custom document using your answers and the template you previously selected. Once you complete the interview, Workspace assembles the final customized document from the template by merging the interview answers into the template text.

The left pane of the interview window displays an outline of the interview. As the user answers questions, the outline tracks the user's progress through the interview.

Once the user has completed the interview, the finished document is added to the current work item. The answers supplied in the interview are also saved, so that the user can update the completed document in the future without having to input all the answers again.

The HotDocs interview is displayed using either JavaScript or Microsoft Silverlight. For more details, please refer to the [HotDocs Server documentation](#).

## Answer Mapping: Overview

You can use answer mapping to populate answer fields in an interview with data retrieved from a database. Workspace can fill answer fields or you can select data yourself. For example, when entering customer details, you can open a list containing the names of all customers. When you select the required name from the list, Workspace enters the answers for the name and any related fields (e.g. customer address, phone number) into the interview.

## Answer Mapping in an Interview

The answer mapping appears as a button on an interview dialog:



When you click the button, a list of answers appears in a new Answer Source window.

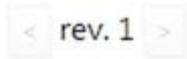
## Versions: Overview

Workspace can store multiple **Versions** of each work item. Once you have created a work item, each subsequent change — adding a document or updating a set of answers — Workspace creates a new version of the work item. There is no limit to the number of versions that you can make for a work item.

By using versions, you can see where and when you have made changes to a work item, or revert to previous versions of a work item. For example, if an error has occurred when you are updating the answers in a document, you can access a previous version of the work item, containing the correct information.

## Using Versions

You can navigate between different versions of the work item using the Revision Navigation buttons. This is available in the [Work Item Details page](#).



## Work Items: Overview

Workspace collects all documents (letters, forms, contracts, and so on) associated with a project together in a single unit known as a [Work Item](#). A work item consists of one or more documents and the set of answers used to generate them. You can save, update, or delete the documents within a work item. You can add new documents to a work item at any time.

## Work Item Groups



Every home page contains one or more Groups. You can use these to organise work items into different categories. For example, you may produce contracts for leasing and selling houses. To keep these two different types of work item separate, all work items concerned with leasing will go in a *Leasing* group. All work items concerned with selling will go in a *Selling* group.

To navigate between different groups, select the group you want from the My Groups drop-down list.





Each group has an assigned set of templates from which they can create work items. When you [create a new work item](#) in a group, you can select one or more templates from the set available to the group.

## Work Item List

Workspace displays the work items currently available to you in the Work Items List on the Home page. Whenever your group create a new work item, workspace adds it to the list.

In the Work Items List, you can click on the title of a work item to go to the [Work Item Details page](#). To the right of the Document name in the work item, you can click on a drop-down arrow to view the document options:  **Update Interview** or  **Download**. If there is more than one document in the work item, the drop-down arrow will first display a list of documents to choose from.

The Workspace Administrator can customize all the other columns available on the Work Items List, selecting from the list below or creating new fields:





- **Description** — Displays the description of the work item
- **Created** — Displays the time the work item was created
- **Modified** — Displays the time the work item was last updated
- **Last User** — Displays the name of the last user to update the work item
- **Version** — Displays the version widget that allows you to control which revision to display
- **Quick Actions** — Displays the 4 quick action buttons:
  -  Add another document to the work item
  -  Edit the work item
  -  Export answers
  -  Delete the work item

## Work Item Details Page: Overview

Each work item in Workspace has a Work Item Details page. From this page you can perform actions such as adding another document to the work item, exporting the answers, updating the interview and downloading the template. You can also view the work item history and switch between versions of the work item.

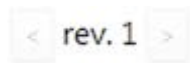
### Edit Functions

You can use the buttons at the top of the screen to edit the work item:

-  **Add another document** — Allows you to add a new template to the work item
-  **Edit title and description** — Allows you to edit the title and description of a work item
-  **Export answers** — Exports the answers from the current version of the work item as a HotDocs Answer File (.anx)
-  **Delete item** — Deletes the currently selected work item




### Versions

Whenever a work item is modified by a user, a new numbered [Version](#) of the work item is created. This enables users to keep track of changes made to a work item. To navigate between earlier and later versions of a work item, click the **Version Navigation buttons**: <, >.



### Assemblies

Next to every template and document used in the work item there are two options:

-  **Update Interview** — Re-opens the current version of the interview and allows you to make changes
-  **Download** — Downloads the current version of the selected document
-  **Download PDF** — Downloads the current version of the selected document as a PDF

### History

At this page, you can also view creation and modification details about the current work item:

- **Assembled** — time a document was last assembled and the user who assembled it
- **Last Update** — time the last update on the work item was made and the name of the user who performed the activity
- **Item Creation** — time the work item was created and the name of the user who created it

# Using Workspace

## Add a Document

After you have created it, most work items consist of a single document. You can add additional documents to a work item, and Workspace will populate any questions common to both documents with the answers from the first. You can add as many documents to a work item as you like.

### To add a document to a work item

1. Go to the [Work Item Details](#) page. You can access this from the Home page by clicking on the title of a work item in the work item list.
2. Click **+ Add another document**.
3. Click on the template you want to assemble from the list of templates available in the current group.
4. This will launch the HotDocs [interview](#). Add any additional information you need into the interview, then click **Finish**.

## Answers for Multiple Documents

Within a work item, there may be multiple documents that use the same information. For example, a contract may require that a customer's name is repeated across several different documents. To ensure that information is accurate across these documents, the Flexible Document Platform stores a single answer for the customer name. The answer is then used by all documents in the work item that show the customer name. This means that changing the name in one document updates all other documents with the new name.

For this to work correctly, the same variable name must be used in every template which is to use the information.

## Change your login password

### To change your login password


1. Ensure you have logged in to Workspace.
2. The Authentication Status Bar appears at the top right of the window. Click **Change Password**.
3. Enter your old and new passwords into their respective fields.
4. Click **Change Password**.

## Copy a Work Item

This functionality is disabled in Workspace by default. To enable this functionality, you need to edit the [Workspace Web.config](#) file. For more information, contact your [Workspace Administrator](#).


Copying a work item copies all of the documents and related answers from one Work Item into a new, separate Work Item. Changes made to one Work Item will not affect the other Work Item.

### To copy a work item



1. Navigate to the home page. There is a  **Copy** button next to each work item in the Work Items List.
2. Click the **Copy** button next to the Work Item you wish to copy.
3. The Copy Work Item page appears and prompts you for a Work Item Title and Description. Fill out the fields and click **Save Changes**.
4. You are returned to the Home page. The new work item appears in the Work Items List.

## Create a Document

### To create a document

1. On the home page, select the [Group](#) you want from the drop-down list.
2. Click **Create Work Item**.
3. Click the name of the template you would like to use create your document. This opens the HotDocs interview for that template.
4. Fill in your answers. For help on how the interview works, click  in the interview's toolbar. When you have entered all the information, click **Finish**.
5. At the Work Items Details page, you can **Download** the document, edit your answers in the interview, or create a new version of the document by clicking **Update**.

## Create a Work Item

1. In the Navigation bar, click **Home**.
2. Make sure you have selected the correct group from the drop-down list the click **Create Work Item**.
3. Click on a template to add it to your new work Item. If you need to see information about the template, click the  **Information** button next to the template. If you want to upload an existing [Answer File](#) to use with the template, click the  **Upload Answer File** button.
4. A HotDocs [Interview](#) appears. Navigate through the interview until you have completed it.




- Once you have finished and Workspace has processed the answer, the [Work Items Details page](#) appears, where you can view and modify the work item.

## Edit a Work Item

Workspace lists work items on the Home page with a title and description. By default, the description is blank, and the title contains the phrase "New Work Item" (this might be different on your system) and the date and time of creation. You can use the [Quick Search](#) to search the text of these titles and descriptions, so you may wish to replace them with more useful information.


Some characters cannot be used in Work Item Titles. These are: semicolon (';'), greater than ('>'), less than ('<'), double quote ('"'), pipe ('|'), question mark ('?'), backslash ('\'), and asterisk ('\*').

### To edit a Work Item

- Click on the title of the work item you want to edit.
- Click  **Edit title and description**.
- Type your new title and description, and click the **Save Changes** button.

The new title and description will appear in the work item.

## Export Answers from a Work Item

The  Export function exports the answers from the selected [work item](#) to a HotDocs XML Answer File (\*.ANX). You can export either from the Export link in a work item, or by using the Export button in the Advanced Search panel.

## Log In to Workspace

### To Log In to Workspace

- Open your web browser and enter the address of Workspace as provided by your Workspace Administrator.
- At the login screen, enter your login name and password and click **Log In**. Optionally, check **Remember Me** for Workspace to keep you logged in on this machine until you choose to log out.


For security reasons, use of the Remember Me option is not recommended when accessing Workspace with a public computer.

## Quick Search

The Quick Search function is a quick, simple search function.

In order to take advantage of the Quick Search, you may wish to [edit your work items](#) to add keywords to the title and description.

### To perform a quick search

1. Type the search term in the field with the  **Quick Search** icon.
2. The Work Item list will filter results as you type.
3. To clear the current search, delete the text in the Quick Search box.

# Contact HotDocs Sales and Support

## HotDocs Technical Support

Support for customers with technical support agreements is available by calling the numbers below. To expedite your call, please be at the computer on which the program is running.

### Outside the European Union:

Method of Contact	Information
Telephone	(800) 828-8328 (U.S.)  (801) 615-2200 (International)  U.S. technical support is available from 7:00am to 6:00pm (MST), Monday through Friday.
E-mail	<a href="mailto:support@hotdocs.com">support@hotdocs.com</a>
Web Site	<a href="http://www.hotdocs.com/support/">http://www.hotdocs.com/support/</a>

### Inside the European Union:

Method of Contact	Information
Telephone	0843 208 0704 (U.K.)  +44 131 226 3999 (International)  U.K. technical support is available from 9:00am to 5:00pm (GMT), Monday through Friday.
E-mail	<a href="mailto:tech@hotdocs.co.uk">tech@hotdocs.co.uk</a>
Web Site	<a href="http://www.hotdocs.co.uk">http://www.hotdocs.co.uk</a>

You may also find answers or solutions to questions you have in the HotDocs Wiki. To view the Wiki (as well as access other support options), please visit <http://wiki.hotdocs.com>.

Click [here](#) for information on providing the HotDocs Publications team with documentation feedback.

## HotDocs Sales Support

Experienced HotDocs consultants are available to help you with a variety of services, including integrating HotDocs with other products, building a template library, or providing training. Please contact your sales representative to learn more.

### Outside the European Union:

Method of Contact	Information
Telephone	(800) 500-3627 (U.S. Sales) (801) 615-2200 (U.S. Business) +44 131 226 3999 (International)
Fax	(877) 356-3627 (U.S.) (801) 868-3627 (International)
E-mail	<a href="mailto:sales@hotdocs.com">sales@hotdocs.com</a>
Web Site	<a href="http://www.hotdocs.com">http://www.hotdocs.com</a> <a href="http://www.hotdocs.com/products">http://www.hotdocs.com/products</a> <a href="http://www.hotdocs.com/services">http://www.hotdocs.com/services</a>
Address	387 South 520 West Suite 210 Lindon, Utah 84042

## Inside the European Union:

Method of Contact	Information
<b>Telephone</b>	0131 226 3999 (U.K.) +44 131 226 3999 (International)
<b>Fax</b>	0131 220 9024 (U.K.) +44 131 220 9024 (International)
<b>E-mail</b>	<a href="mailto:info@hotdocs.co.uk">info@hotdocs.co.uk</a>
<b>Web Site</b>	<a href="http://www.hotdocs.co.uk">http://www.hotdocs.co.uk</a>
<b>Address</b>	14 South Charlotte Street Edinburgh, EH2 4AX Scotland



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The HotDocs Publications team cannot respond to technical support or project consulting questions. We are mainly interested in problems with the documentation itself—such as erroneous information, grammatical and spelling errors, or suggestions for topics to include in the next release of the software.

E-mail your comments and suggestions to [publications@hotdocs.com](mailto:publications@hotdocs.com).





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# Glossary

## A

**Add:** The Add function adds additional documents to an existing work item.

**Administrator:** An Administrator is a user that has special rights to manage other Users, create Groups, and upload Templates in Workspace. Ordinary users do not have these rights.

**Advanced Search:** The Advanced Search function uses a set of user-defined filters to search the answers supplied for work items in the selected Group.

**Answer File:** Each document within a work item has an associated Answer File. These can be updated or downloaded as a HotDocs XML Answer File. This answer file can be used with a desktop version of HotDocs (e.g. HotDocs User or HotDocs Player) or uploaded when assembling another document with Workspace.

**Answer Mapping:** An Answer Mapping is a relationship between an answer source (either a database or an XML file) and the variables in a HotDocs template. By using an Answer Mapping, data can be retrieved from an answer source and entered into the answer fields in an interview

**Answers:** Each document within a work item has an associated set of Answers. These can be updated or downloaded as a HotDocs XML Answer File. This answer file can be used with a desktop version of HotDocs (e.g. HotDocs User or HotDocs Player) or uploaded when assembling another document with Workspace.

## D

**Delete:** The Delete function deletes the selected work item from Workspace. All versions of the work item and all documents assembled in the work item are permanently deleted. After a work item has been deleted, it cannot be recovered.

**Document:** A Document is an assembled template, with an associated set of answers, contained within a Work Item. A work item may contain several different documents. A document can be downloaded as a Microsoft Word file (or a PDF, if your system has been configured with this capability) from a link inside its work item.

## E

**Edit:** The Edit function is used to edit the properties of an assembled document.

**Export:** HotDocs Workspace allows you to export your answers from a work item in HotDocs XML Answer File Format (\*.ANX). You can export either from the link in a work item, or by using the export button from the Advanced Search.

## G

**Group:** Every Workspace User is a member of one or more Groups. These are used to organise Work Items into different categories. Each Group has an assigned set of Documents from which Work Items are created.

## H

**Home Page:** The Home Page is the main interface to Workspace. It provides grouped lists of active work items. These work items can be edited, searched through, or new items can be created.

## I

**Interview:** Creating a document in Workspace involves filling out a HotDocs Interview. The interview gathers answers which are used to construct the document, but can be re-used to create other related documents, or for other uses. The interview asks questions that have been defined by a HotDocs template developer. You can learn more about HotDocs at the HotDocs website. For more information about how to use the interview, click the Help icon in the interview's toolbar while creating a document.

## L

**Login Status bar:** The Login Status bar shows the username of the user currently logged in to Workspace. Additionally, it contains a Logout link and a Change Password link. It appears on every page of Workspace.

## M

**Mapped Variables:** A default set of variables used to populate the interview with details of the current user or change the Work Item Title, Description or completed document file format according to information entered into the interview.

## N

**Navigation bar:** The Navigation bar is the top-level navigation menu, linking to the main sections of Workspace. It appears on every page of Workspace. Clicking on a link in the navigation bar takes the user to the selected Section.

## Q

**Quick Search:** The Quick Search function is used to quickly search for Work Items, Users, Groups, and Templates in Workspace. It appears on the Home Page , Users, Groups, and Templates sections.

## R

**Reports:** Each Work Item in Workspace is comprised of one or more documents, each with a set of Answers. A Report collates a selection of Answers from multiple Work Items into a single document.

## T

**Template:** Templates are word processor or form documents that have been converted to the HotDocs format so that they can be automated. By answering questions in a HotDocs Interview, data is merged into the template and saved as a separate, completed Document. Templates may only be uploaded by an Workspace Administrator.

## V

**Versions:** Each time you update a document's interview, you create a new version. These are tracked by number, starting at 1. You can review previous versions by clicking on the < and > arrow links to change the version number.

## W

**Work Items:** A work item consists of one or more documents and the set of answers used to generate them. The name used to refer to work items is customizable by Workspace Administrator. As such, names in your instance of Workspace may differ from those used in the documentation.