

LexisNexis® Automated Forms QuickStart

Install the Automated Forms

The CD includes the Automated Forms library and the latest version of HotDocs Player.

To install the Automated Forms product

- 1 Insert the Automated Forms CD into your CD-ROM drive.

The autorun window should appear. If it does not, then click the **Start** button on the taskbar and select **Run**. At the **Run** dialog box, type **D:\Autorun.exe** (where *D* is the letter of your CD-ROM drive). Then click **OK**.
- 2 Click **Product Installations**. The **Install** menu appears.
- 3 If HotDocs Player is not already installed, click **Install HotDocs Player**. Follow the on-screen prompts.
- 4 Click **Install Automated Forms**. Follow the on-screen prompts.

Opening the Library

The Automated Forms library organizes the templates in your LexisNexis product.

To open the library

- 1 Click the **Start** button on the taskbar. The **Start** menu appears.
- 2 Point to **Programs**, and then **LexisNexis Automated Forms**.
- 3 Click the Automated Forms product name you want to use. HotDocs Player opens, displaying the list of templates.

Assembling a Document

HotDocs templates allow you to complete customized documents.

To assemble a document

- 1 At the Automated Forms library window, locate and select a template.
- 2 Click **Assemble**. The **Answer File** dialog box appears.
- 3 Select an answer file and click **OK**. The assembly window appears.
- 4 Enter your answers in the fields of the dialog pane on the right. You can move between fields by pressing **Tab** or **Shift+Tab**.
- 5 Move to the next dialog by:
 - Clicking the **Next** button in the navigation bar.
 - Pressing **Enter**.
 - Pressing **Page Down**.
 - Clicking any other dialog in the interview outline (the pane on the left).
- 6 Continue entering answers until you reach the **End of Interview** dialog. Follow the instructions to save or print your completed form.

Direct-Filling a Form

While viewing a form template at the **Form Document** tab in the assembly window, you can type answers directly in the form fields.

To direct-fill a form

- 1 At the Automated Forms library window, locate and select a form template.
- 2 Click **Assemble**. The **Answer File** dialog box appears.
- 3 Select an answer file and click **OK**. The assembly window appears.
- 4 Click the **Form Document** tab to display the form and the answer fields.
- 5 Select a field. The field changes color.
 - If the field turns yellow, enter your answer.
 - If the field turns gray, select the answer wizard button to display a pop-up inter-view where you can enter your answers.
- 6 Press the **Tab** key to move to the next field, or select a field with your mouse.
- 7 When the document is completed, you can print or save it using the buttons in the assembly window toolbar.

Saving Answers

By saving information in answer files, you can reproduce exact copies of a document, or assemble other documents that use the same answers.

To save answers in an answer file

- 1 At the assembly window, click the **Save Answers** button. If you are working with a new, untitled answer file, the **Save Answer File** dialog box appears.
- 2 Provide a file name, title, and description (optional) for the answer file.
- 3 Click **OK**. The answer file is saved.

Opening a Completed Document

After completing a document and saving it, it is no longer connected to the original template from the Automated Forms library. You can open the file for printing or editing, but any changes will only be made to the custom document.

To open a completed form document (HPD, HFD format)

- 1 Click the **Start** button on the taskbar.
- 2 Point to **Programs**, then **HotDocs Player**, and then select **HotDocs Filler**. HotDocs Filler opens.
- 3 Choose **Open** from the **File** menu or the toolbar.

To open a completed text document (DOC, RTE, WPD format)

- 1 Open your word processor.
- 2 Choose **Open** from the **File** menu or the toolbar.

Technical Support: (800) 223-5297