

LexisNexis® Automated Forms

User Guide



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Contact Information

LexisNexis Automated Forms
1-800-543-6862
www.lexisnexis.com/autoforms

For technical support, call (800) 223-5297.

To renew your subscription, or order other Automated Forms products,
please call 800-223-1940.

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Section 1: Getting Started

Overview

LexisNexis® Automated Forms help you quickly generate accurate documents for your practice. After you install the forms set on your workstation, you can access it by starting HotDocs Player™ from the **Start** menu.

The CD you received includes the forms set and the latest version of HotDocs Player. Each of these must be installed separately. When you install them on your workstation, you should accept the standard settings defined by the installations, unless your system administrator tells you to make specific changes to these settings.

-- Note --

If you want multiple users to access the forms set on a network drive, see "Install LexisNexis Automated Forms on Multiple Workstations" on page 4.

Install HotDocs Player

If HotDocs Player is not already installed on your workstation, you will need to install it before installing the forms set.

-- Note --

The latest version of HotDocs Player can be installed on the same computer as previous versions of HotDocs Standard or Professional Edition. (For best results, you should first download and install the latest service pack for your existing version of HotDocs at <http://www.hotdocs.com/downloads/software-updates>)

To install HotDocs Player

1. Insert the forms set CD into your CD-ROM drive. The **LexisNexis Automated Forms** CD browser window appears.
2. Click **Install**. The **Install** menu appears.
3. Click **Install HotDocs Player**. The installation program starts.
4. Follow the on-screen prompts to complete the installation. At the end of installation, click **Finish**.

Tip: If the CD browser window does not appear automatically, select **Run** (**Start** menu) and type **D:\autorun** (where D:\ is your CD-ROM drive).

Install LexisNexis Automated Forms

After HotDocs Player has been installed on your workstation, you are ready to install the LexisNexis Automated Forms set.

To install the forms set

-- Note --

If you are installing the forms set immediately after installing HotDocs Player, the CD browser's *Install* menu should already be displayed. Skip to step 3.

1. Insert the forms set CD into your CD-ROM drive. The **LexisNexis Automated Forms** CD browser window appears.
2. Click **Product Installations**. The Install menu appears.
3. Click **Install Automated Forms**. The installation program starts.
4. Follow the on-screen prompts to complete the installation.

-- Note --

Some virus scanners may display a warning message and block certain operations during the installation. If this happens, choose the option that allows the operations to proceed. Otherwise, the forms set will not be installed correctly.

Install LexisNexis Automated Forms on Multiple Workstations

If you have obtained a multi-user license, you can install LexisNexis Automated Forms on your network and run HotDocs Player on multiple workstations. The multiple workstation setup differs from the standard setup by placing the template and library files on a network drive shared by all users instead of on local workstations. Also, the network administrator performs all updates instead of the individual users.

There are four parts to installing the LexisNexis Automated Forms on multiple workstations:

- Set up the network drive that will store the forms set files.
- Deploy the forms and workstation installation files to a folder on the network.
- Customize the workstation install as desired.
- Run the workstation installation program on each workstation. This program first installs HotDocs Player if it is not already installed on the workstation. Then it runs the Automated Forms workstation setup program, which creates shortcuts to the library on the network and configures HotDocs to access the Automated Forms from the network.

-- Note --

If you are installing a new release of a forms set you have previously installed on the network, you should use the same settings and file locations as the original installation. This ensures that users can continue accessing the forms as before without additional changes to individual workstations. However, if the new forms set includes an updated version of HotDocs Player, the new Player should be installed on each workstation.

Part 1: To set up the network for the forms set install

1. Identify a network drive accessible to all users who will use the forms set.
2. Ensure the target drive has sufficient space to store the forms set with its supporting workstation installation files. The space required varies depending on the forms set, but it is usually 100–250 MB. The network install will check for sufficient space before it copies files to the network.
3. Optionally, create a folder on the network drive where you want to store the forms set files. The network install will create a folder if one does not exist, but you may want to create a folder on the network drive to hold all of your LexisNexis Automated Forms sets.
4. Optionally, create a folder for answer files.
5. Set file system rights to the network folders. Generally, users accessing the forms on a network should have read-only access to prevent them from deleting or changing the files. The exceptions to this rule are the answer file and upload answer file folders that do require users to have write access. Network administrators should have full access to the network folders.

Part 2: To deploy the forms and workstation installation files to the network**-- Caution --**

Deploying the forms and workstation installation files to the network does not actually *install* software in the sense of adding it to Windows' *Add or Remove Programs* list. Instead, it simply copies files to the network and configures them for easy distribution to individual workstations. If you wish to remove the files from the network, simply delete the contents of the network folder. Likewise, if the network location contains files from a previous install, you should delete the old contents before deploying the new files.

1. Insert the forms set CD into your CD-ROM drive.
2. Click the **Start** button on the Windows taskbar, and then select **Run**. The **Run** dialog box appears.
3. Type **D:\ns\deploy.cmd** (where *D:* is your CD-ROM drive), and then click **OK**. The installation program starts. Follow the on-screen prompts to complete the deployment.
4. When prompted for the **Network location**, specify the network location where the forms set and workstation setup program will be located. (This location must be different for each forms set you deploy to the network. You may use the same main folder, but each forms set must be deployed to a separate subfolder.)
5. At the **Customizing the Workstation Installs** dialog box, note the location of the workstation command (batch) file, *workstation.cmd*, and then click **Install**.

Tip: If the network location contains files from a previous install, you should delete the old contents before continuing.

Part 3: To customize the workstation install

1. Browse to the location of the workstation command file (*workstation.cmd*) as noted in step 5 above.

-
- 2.** Edit **workstation.cmd** (right-click and choose **Edit** from the shortcut menu).
The file is opened in Notepad.

Note: The **workstation** command file allows network administrators to install HotDocs Player and Automated Forms on multiple workstations without manually changing the settings each time. It contains a number of **msiexec** commands, most of which should be commented out with the **REM** command.

- 3.** Add or remove **REM** commands in the file so that commands with the desired arguments are activated. See “**Installation Command-Line Options**” on page 6 below, for a list of these options.

Each command begins by calling Windows Installer (**msiexec**) with the **install** (**/i**) command-line option to indicate which installation package to install. For example:

```
msiexec /i "HotDocs Player Edition.msi"  
msiexec /i "LexisNexis Automated Forms.msi"
```

Any parameters after the name of the installation package customize the behavior of the install.

- 4.** Save your changes to **workstation.cmd**, and close Notepad.

Installation Command-Line Options

The following list describes the available command-line options and their associated descriptions:

/qn

This option installs HotDocs or the template set silently. For example:
`msiexec /i "HotDocs Player Edition.msi" /qn`

-- Caution --

When this option is used, the install is completed without user intervention and without any visible indication of the installation process. The user will not be prompted for file locations or otherwise be able to customize or cancel the installation.

Windows Vista users: The silent install option, **/qn**, may not work properly on Windows Vista because of User Account Control (UAC). To display a reduced dialog (progress bar and **Cancel** button only), use the **/qb** command-line option.

INSTALLDIR

This option specifies a folder for HotDocs program files other than the default location. You can use this property when installing HotDocs Player:

```
msiexec /i "HotDocs Player Edition.msi" INSTALLDIR="C:\HotDocs Player\"
```

This command would install HotDocs Player to `C:\HotDocs Player\` rather than the default (`C:\Program Files\HotDocs 11\`).

FOLDER_ANSWERS

This option specifies a folder for HotDocs answer files other than the default location. You can use this property when installing HotDocs Player:

```
msiexec /i "HotDocs Player Edition.msi" FOLDER_ANSWERS="K:\Answers\"
```

This command would set up HotDocs to use K:\Answers\ as the default answer file folder.

Note

If HotDocs was installed previously, this will not replace a user's existing answer file folder preference. In that case, HotDocs will continue to use the answer file folder previously specified by the user. See "Change HotDocs Program File Locations" in HotDocs Help for information about manually changing the answer file folder.

If this property is used once, it should also be used each time a subsequent version of HotDocs is installed.

WSINSTALL

When installing the template set on the administrator's workstation, this option must specify the folder in which the templates are located on the network:

```
msiexec /i "California Wills and Trusts.msi" WSINSTALL="H:\California Wills and Trusts\"
```

INSTALL_HCAT

This option enables automatic update notifications. You can use it when installing the template set:

```
msiexec /i "LexisNexis Automated Forms.msi" INSTALL_HCAT=yes
```

In a network setup environment, one user is typically designated as the template set administrator. Automatic update notifications should be enabled for that user, but not for the rest of the users. In that way, only one user will see the update notifications and apply the updates, but all users will see the updated templates when the administrator applies the updates.

For information about automatic update notifications, see "Update the Templates in Your Template Set" on page 32.

/L*v

This option creates an installation log file. You can use it with the HotDocs Player or template set install:

```
msiexec /i "HotDocs Player Edition.msi" /L*v C:\player.log  
msiexec /i "LexisNexis Automated Forms.msi" /L*v C:\templateset.log
```

This option causes the install to create a log file with details about which files were installed and whether the install succeeded or not. Log files are useful for troubleshooting errors that may occur during the installation.

Tip: This batch file does not work if you run it from a UNC path. Map the network drive as needed to avoid this error.

Part 4: To run the workstation installation program on each workstation

1. At each workstation, click the **Start** button on the Windows taskbar, and then select **Run**. The **Run** dialog box appears.
2. In the **Open** box, specify the path to the workstation command file (for example, *H:\workstation.cmd*).
3. Click **OK**.
4. Follow the on-screen prompts to complete the installation. It will install HotDocs Player (if not already installed on the workstation), create shortcuts to the library on the network, and configure HotDocs to access the forms set on the network.

Use This Guide

This guide assumes you know how to use Windows. If you have questions about working with Windows (such as how to adjust or navigate windows), refer to your Windows help. To access Windows help, click the **Start** button on the taskbar, and then select **Help and Support**.

LexisNexis Automated Forms sets work in conjunction with Microsoft Word® and Corel® WordPerfect®. You should be familiar with the basic editing techniques in your word processor application.

Understand Your Professional Responsibility

You have licensed a forms set designed to assist you in your professional practice. It is your responsibility to review the templates and documents, determine their accuracy, and decide whether they meet your purposes. These materials are not intended as a substitute for your professional judgment.

Get Help While Using Your Forms Set

You can use the HotDocs help system to find information about HotDocs that can help you work with your forms set. To access the HotDocs Help, click the **Help** menu at the template library or assembly window, and then choose **HotDocs Help**. You can also press **F1** from anywhere within HotDocs.

Use the Demonstrations on the Forms Set CD

The installation CD contains several demonstrations that give step-by-step instructions on how to use HotDocs and work with your forms set. These demonstrations introduce you to basic tasks of using the forms set.

To view a demonstration

- 1.** Insert the forms set CD into your CD-ROM drive.
 - If autorun is enabled on your CD-ROM drive, the CD browser window appears.
 - If autorun is not enabled, click the **Start** button on the taskbar, and then select **Run**. At the **Run** dialog box, type *D:\autorun.exe* (where *D:* is your CD-ROM drive), and then click **OK**.
- 2.** At the CD browser window, click **Product Resources**. The CD browser window changes to show a list of resources.
- 3.** Click **Demonstrations**. The **Demonstrations** window appears.
- 4.** Move the mouse pointer over the demonstration titles. A summary of each demonstration appears to the left.
- 5.** Click the demonstration you want to view.
 - To navigate through a demonstration, click the right arrow to continue to the next step, or click the left arrow to return to the previous step. To end the demonstration, click the **X** in the upper-right corner.
- 6.** When you are finished viewing the demonstrations, click the **X** button in the upper-right corner of the window. The **Product Resources** list appears again.

Update the Templates in Your Forms Set

Legal forms change frequently. Each time you start HotDocs, it automatically checks for updates to your forms set, provided you have an open Internet connection. If any updates are available, you will see a flashing  **update** icon in the status bar (lower right-hand corner of the HotDocs library window).

-- Caution --

The first time you run HotDocs Player, your firewall software may warn you that HotDocs is about to access the Internet. You should grant HotDocs permission to access the Internet in order for the automatic template set update feature to work.

Tip: You can also check for updates manually at any time by selecting **Tools > Update Template Sets**.

To update template sets automatically

- 1.** Double-click the  **update** icon. The **Install Template Set Updates** dialog box appears, displaying a list of updates.
- 2.** Select **Install** for each update item you would like to download and install.

Tip: If the **Discard** check box is disabled for an update, it is 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.)

3. Select **Discard** for each update item you do not wish to install. HotDocs will not prompt you to install discarded updates again.
4. Click **Continue**. HotDocs installs the selected update items. If prompted, select **Overwrite and Continue** to replace old files with the updated files.

-- Note --

If you are using a network install with multiple workstations, the automatic updates will only be available if the *INSTALL_HCAT* property was used in the workstation command file. (See, "Install LexisNexis Automated Forms on Multiple Workstations" on page 4.)

If you prefer not to use the automatic template set update feature, LexisNexis provides updates to Automated Forms through HotDocs auto-install (.HDI) files posted on the Internet. Follow these steps to update your forms and template library.

-- Note --

Occasionally you may be asked to participate in a short, customer-satisfaction survey. These surveys usually contain about four questions and are distributed once a year. Completing the survey allows you to provide feedback to LexisNexis. If you choose not to participate in a survey, simply click the **Close** button on the survey message box.

To update template sets manually

1. In your Internet browser, go to <http://support.lexisnexis.com/autoforms>.
2. Browse to the update page for your forms set.
3. Click the desired update file. HotDocs installs the templates, and automatically opens the updated library.

Tip: Some template sets require a password to install updates. When prompted, enter the password found in your template library.

Contact Technical Support

LexisNexis Technical Support specialists are available 24 hours a day, seven days a week. If you are having difficulty installing or using the software, or if you encounter an error message, please contact us:

Technical Support Hotline: (800) 223-5297

To expedite your call, please be at the computer on which the program is running, and have your customer account number on hand.

If you encounter other problems, or if there are features you would like to see added to the software, contact us at:

1-800-543-6862
www.lexisnexis.com/autoforms

Or, you can submit your comments and requests using the form at this URL:
<https://support.lexisnexis.com/Custom/automated-forms-form/>

Section 2: Use the HotDocs Template Library

Overview

Once HotDocs is installed, you can use the forms set templates to assemble documents. To access the templates, you will use the HotDocs template library.

The template library helps you organize various HotDocs files, including interview templates, text templates, and form templates. After you open the template library, you can use templates in the forms set to assemble documents.

Tip: To learn more about the HotDocs library window and using template libraries, see the HotDocs Help. To access the HotDocs Help, select **HotDocs Help** from the **Help** menu, or press **F1**.

Open the Library

The first step to using your template set is to open the template set library.

To open the template library

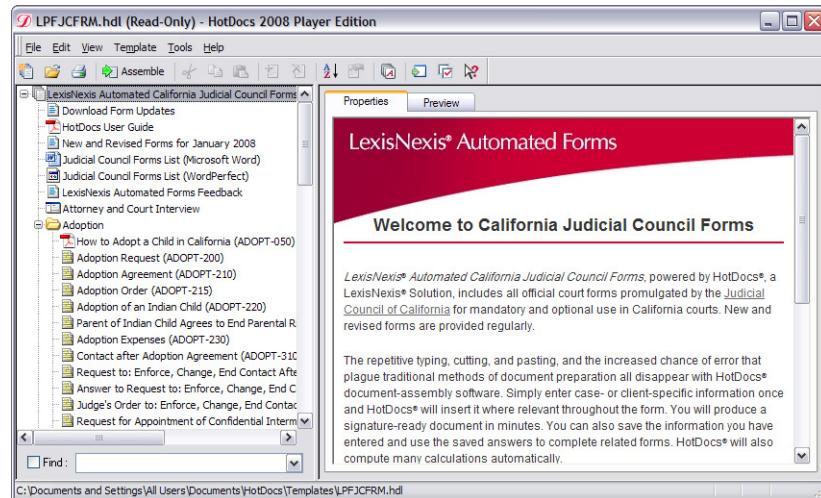
1. Click the Start button on the Windows taskbar. The Start menu appears.
2. Point to Programs > **LexisNexis Automated Forms**.
3. Click the name of the forms set for the word processor you want to use. The template library opens, showing the templates in the forms set.

To close the template library

- Select **Exit** (**File** menu), or click the X in the upper-right corner of the template library.

Understand How the Template Library is Organized

The template library organizes the HotDocs files in your forms set. This makes it easier to locate and access the templates and clause libraries you need. Using a library lets you scan through titles and descriptions of templates, or you can search for specific files.



The template library window is divided into two panes. The left pane lists the items referenced in the library. The right pane displays information about a selected item, including a description, such as a note explaining when a template should be used. (For more information on working with a template library, see the HotDocs Help.)

To search for a specific item in the library

1. At the HotDocs library window, select the **Find** check box. The template list changes, showing the templates in alphabetical order.
2. In the **Find** box, type the text for which you are searching. The template list changes to show only the items with titles or descriptions that include that text.

To view the entire library again, clear the **Find** check box.

Identify the Different Types of Templates in a Library

LexisNexis Automated Forms sets contain several types of templates, each designed to help you assemble documents.

Interview Templates

 An interview template does not assemble a document. This kind of template gathers and saves information in a HotDocs answer source. Providing answers for an interview template is also called completing an intake interview. The answers from the intake interview can then be used in assembling other documents.

For example, a template library might include an interview template named *Client Information*. This template could gather general information about each client—such as a name, address, gender, date of birth, and so forth. You could assemble this interview template first and create a set of answers in the answer source. Then, when you assemble other documents that ask for client information, the answers are available for you to select.

Text Templates

 A text template is created and automated in a word processor, such as Microsoft Word or Corel WordPerfect. After you assemble a document using a text template, you can view the document in your word processor and edit any section of the text.

Form Templates

 A form template is a static form, or one in which the underlying text cannot be changed or modified. You can provide answers for these graphic-based documents by answering a series of dialogs, or by using direct-fill assembly to type answers directly on the form. In form templates, though, answers are limited to a specific area on the page, which may not provide enough space for the answer. Answers that overflow can be sent to an addendum.

Section 3: Complete an Intake Interview

Tip: To learn more about completing HotDocs interviews, see the HotDocs Help. To access the HotDocs Help, select **HotDocs Help** from the **Help** menu, or press **F1**.

Overview

Frequently as you assemble documents, you are required to enter the same information multiple times. For example, you may need to enter information about the attorneys associated with a specific case. Rather than enter this information each time you need to create a document, you can instead complete an intake interview and save this information in an answer source.

Then when you assemble any documents where this information can be used, a **Select** button appears on the dialog. You can click the **Select** button to access the answers you provided at the intake interview.

Create an Answer Source

To create an answer source, you must assemble an interview template. This template simply asks the questions that may be used throughout the template set. Answers you enter are saved to an answer file, which you can then access from dialogs requiring the same information.

To provide information for an intake interview

1. At the HotDocs library window, select the interview template and click  **Assemble**. The assembly window appears, showing the informationgathering dialogs.
2. Type answers for the questions and click  **Add Another**. HotDocs displays another empty dialog for you to enter answers.
3. Repeat this process until you have entered all the answers you need.
4. When you are finished, click  **Finish**. The answers you entered are automatically saved to an answer source. (For information on accessing answers in an answer source, see “Section 4: Assemble a Text or Form Document” on page 15.)

Section 4: Assemble a Text or Form Document

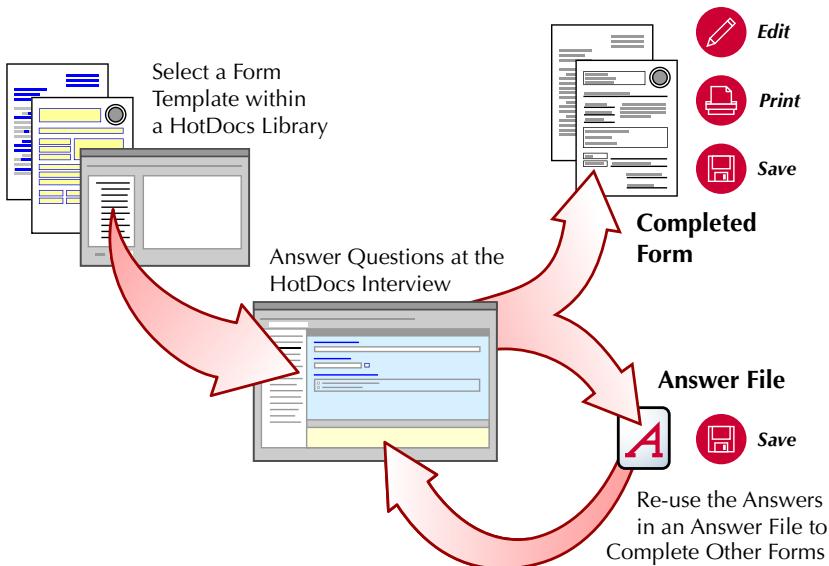
In HotDocs, all types of documents can be assembled in the same way. The general process is explained in this section, while details specific to assembling form (or graphical) documents are presented in the next section, “Section 5: Directly Fill a Form Document” on page 26.

Tip: To learn more about assembling documents in HotDocs, see the HotDocs Help. To access the HotDocs Help, select **HotDocs Help** from the **Help** menu, or press **F1**.

Overview

To assemble a document using the forms set, you select the appropriate template from the library window. This starts an interview where you can provide answers, and then save and print the completed document. You can also save the answers you provide in an answer file, which allows you to use those answers to quickly assemble other documents.

The following graphic shows the process of completing a document:



This section will address the following tasks:

- Starting an interview to assemble a document.
- Selecting an existing answer file.
- Providing answers for the interview (including how to access answers from an answer source).
- Accessing resource information to help you answer questions.
- Using the *End of Interview* dialog to preview documents, send them to other applications, or save them.
- Saving information in an answer file.
- Viewing question or answer summaries.
- Printing completed documents.

-
- Opening saved documents.

Start an Interview

When you open HotDocs, the template library window appears, listing the available templates. To verify that you have selected the correct template, you can use the **Preview** tab to see the general appearance of the document. (For more information on searching for templates or previewing documents, see the HotDocs Help.)

When you select a template and begin assembling a document, you start the interview process.

To start an interview

1. At the HotDocs library window, locate and select a template. The **Properties** tab of the library window changes to show information about that template.
2. Click  **Assemble**. The HotDocs assembly window appears and the **Answer File** dialog box appears.

Tip: You can also start the interview by double-clicking the template.

Select an Answer File

You can use answer files you have previously created to assemble new documents. When you start an interview, the **Answer File** dialog box appears, which allows you to either select an existing answer file or create a new one.

To select an answer file

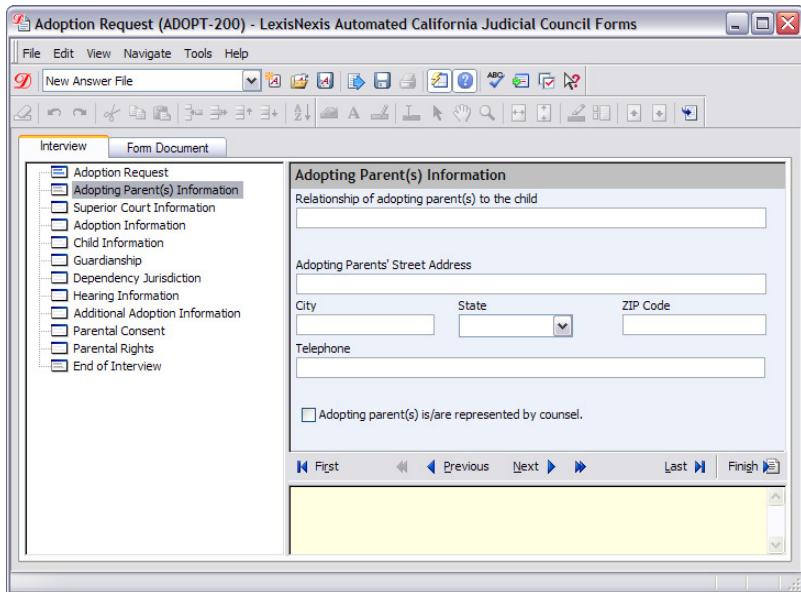
1. At the **Answer File** dialog box, accept the suggested answer file by clicking **OK**, or change the answer file by clicking one of the answer file buttons:
 -  **Select Answer File** opens the **Select Answer File** dialog box where you can choose an existing answer file. After making your selection, click  **Select**.
 -  **New Answer File** creates an empty, untitled answer file.
2. Optionally, select **Automatically select this answer file for use with the next assembly**.

This will cause the same answer file to be suggested for every interview so that you don't have to manually select it each time you assemble a document. The next time you start an interview, the same answer file will be suggested. You can, of course, choose a different answer file.

3. Click **OK**. The assembly window appears, showing answers from the selected answer file in the corresponding answer fields.

Provide Answers for an Interview

When you assemble a document, the interview appears in the HotDocs assembly window. Most templates include questions that have been arranged into related groups, called dialogs. The left pane of the assembly window, the *interview outline*, lists the dialogs used in each template. The right pane, or *dialog pane*, displays the specific questions used in each dialog.



Providing answers for these questions is the central task of an interview. You can enter all the necessary answers, or you can use information from an answer source. As you provide answers for each dialog, the icons in the interview outline change to reflect how much of the dialog is complete:

- None of the questions in the dialog are answered
- At least one of the questions in the dialog is answered
- All the questions in the dialog are answered
- Repeats the dialog, allowing you to enter more than one set of answers
- New, empty repeating dialog where you can add another set of answers to a list

Even if you use an existing answer file to provide information for the interview, you may still need to update some answers. You can modify existing answers or enter new information.

To enter answers in an interview

1. At the assembly window, select a dialog from the interview outline. The dialog pane changes to show the questions in that dialog.
2. Click in an answer field. That answer field becomes active.
3. Enter your answer.
4. Move to another answer field by:

- Pressing **Tab** to move to the next answer field.
 - Pressing **Shift+Tab** to move to the previous answer field.
 - Clicking another answer field in the dialog.
5. Move to another dialog by:
- Pressing **Page Up** (takes you to the previous dialog) or **Page Down** (takes you to the next dialog).
 - Clicking a button in the navigation bar, located at the bottom of the dialog pane.
 - Selecting another dialog in the interview outline.

Enter a List of Answers

Some dialogs gather a list of information, instead of a single answer. These dialogs repeatedly display the same questions. To enter multiple records in a list, click the  **Add Another** button. When you are finished with the list, click  **Next**. You can also use your mouse pointer to select another dialog.

Use Answers from an Answer Source

If you have already provided answers in an intake interview, you can use that information to quickly provide answers for the document. Dialogs that can access an answer source where intake information is saved will display a  **Select** button.

To use answers from an answer source

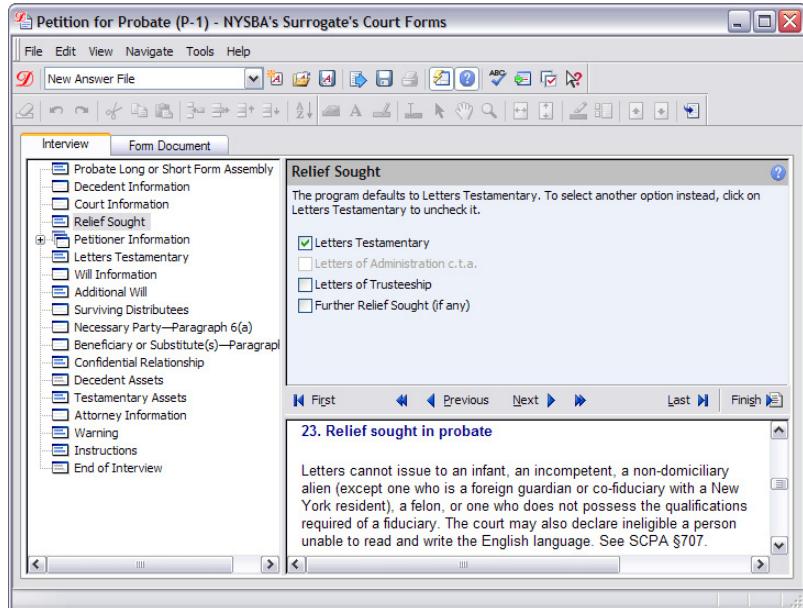
1. In a dialog that includes a Select button, click the  **Select** button. A pop-up dialog containing a spreadsheet of answers included in the answer source appears.
2. Optionally, modify answers in the answer source as follows:
 - Add new answers by selecting a blank row in the spreadsheet and clicking  **Edit Row**.
 - Edit existing answers by selecting the row you want to edit and clicking  **Edit Row**.
 - To remove answers from the answer source, select a row and click  **Delete Row**.
3. Select the desired set of answers from the list, and then click the  **Select** button. The assembly window appears again with the selected answers shown in the answer fields.

Tip: You can also modify an answer source by assembling the intake interview template again. See, "Section 3: Complete an Intake Interview" on page 14.

Access Resources for Questions in an Interview

Some questions may include information to help you answer the question. If such information is included, the resource pane (below the dialog pane) displays the information.

If the resource pane is not visible, you can click the **Resource** button, or select **Dialog Resource Pane** (**View** menu). You can change the size of the resource pane by selecting the top border of the pane and dragging it up or down.



Preview a Completed Document

After entering answers in the interview, you can print or save the completed document, or attach it to an e-mail message. Before doing any of these tasks, you can view the assembled document in the assembly window and make sure the information is accurate.

You can preview both a text document and a form document.

To preview a text document

- At any time during assembly, click the **Document Preview** tab. The assembly window changes to show a preliminary version of the document.
- Scroll through the document to verify that the information you have provided is correct.

Answers are shown merged into the document text. To change an answer, you must click the **Interview** tab again, and navigate to the appropriate dialog.

Tip: The **Document Preview** tab may not accurately display formatting details, such as text alignment or font formatting. These variations occur only in the preview; the final document will be formatted as you expect it.

--Note--

When assembling a Word template, you may also double-click the answer at the **Document Preview** tab to view its dialog and modify the answer without switching to the **Interview** tab.

To preview a form document

1. At any time during assembly, click the **Form Document** tab. The assembly window changes to show the form document.
2. Scroll through the document to verify that the information you have provided is correct.

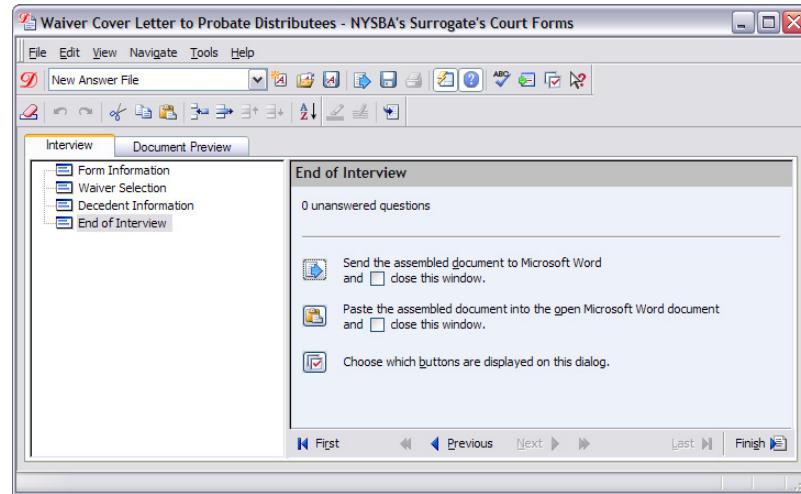
Answers are shown in answer fields. To change an answer, select the field and type the new information.

--Note--

Typing or changing answers at the **Form Document** tab (instead of the **Interview** tab) is referred to as direct-fill assembly. Some form templates require direct-fill assembly for some or all of the answers. See "Use Direct-Fill Assembly for a Form Template" on page 26.

Use the End of Interview Dialog

The *End of Interview* dialog appears after the last dialog in each interview. At the top of the dialog, unanswered questions are reported. Below that are buttons for working with your document, and check boxes for closing the assembly window.



By selecting the **close this window** check box with various options, HotDocs will automatically close the assembly window. HotDocs remembers which check boxes are selected and will use these settings in future assemblies.

When the assembly window closes, HotDocs may ask if you want to save the assembled document. If you already sent the document to the word processor or HotDocs Filler, or saved it in a file, there is no need to save the assembled document again. You can select **Don't ask me about saving again** and click **Don't Save** to prevent HotDocs from asking each time you close the assembly window.

This section describes the buttons that appear by default at the *End of Interview* dialog. The buttons available will vary according to the type of document you are assembling. Also, depending on your work preferences, you can select which buttons will appear at the *End of Interview* dialog. (See, "Customize the End of Interview Dialog" on page 22.)

Tip: You can also prevent HotDocs from prompting to save documents when closing the assembly window by making a selection at the **HotDocs Options** dialog box. In the **Document Assembly** folder, clear **Prompt to save document when closing assembly window**.

Review Unanswered Questions

If you skip questions during the interview, HotDocs will display a message at the *End of Interview* dialog indicating how many questions are unanswered. Normally, you should answer each of these questions before proceeding.

To return to unanswered questions in the interview

1. At the *End of Interview* dialog, click **Go to the first unanswered question in the interview** to return to the place in the interview where the first unanswered question appears.
2. Click the **Next Unanswered Dialog** button in the navigation bar to navigate to each subsequent unanswered question in the interview.
3. When all questions are answered (as indicated by icons in the interview outline), click the **Next Unanswered Dialog** button to display the **End of Interview** dialog.

View an Assembled Form Document

After you complete an interview, you can view the assembled form document at the **Form Document** tab.

To view an assembled form document

1. At the *End of Interview* dialog, click **View the assembled form document at the Form Document tab**. The assembly window changes to display the form document.
2. Optionally, if you want HotDocs to notify you of any overflowing answer fields when it displays the form document, select **check for answer overflow**.

Send a Text Document to the Word Processor

After you complete an interview, you can view the assembled text document in your word processor.

To send a text document to the word processor

Tip: Pressing **F11** will also send the document to the word processor.

Tip: This dialog box only appears if **Display unanswered warning before saving documents** is selected in the **Document Assembly** folder of **HotDocs Options**.

- At the **End of Interview** dialog, click **Send the assembled document to the word processor**. The word processor appears, showing the completed document.

-- Note --

If there are any unanswered questions, a dialog box may appear giving you the option of returning and answering these questions. You can ignore this option and still send the document to the word processor, but be aware that some of the answers may be missing and information in the document that relied on this information may be incorrect.

While you are assembling a document, you can change an answer in one location and that change is applied throughout the document. However, once you save a document, it is separated from HotDocs and no longer functions as an automated form. This means you must manually locate and change each answer that needs to be modified. If you must change answers in an assembled document, it is recommended that you reassemble the document using the original answer file and make your changes during assembly.

Paste an Assembled Text Document into an Existing Document

You can paste (insert) an assembled text document into an existing word processor document. For example, if you have an existing contract, you can assemble a document containing additional terms to the contract and paste those new terms into the existing document.

To paste an assembled text document into an existing document

- In your word processor, open the document into which you want to paste the assembled document.
- Place your cursor at the location in the document where you want to paste the assembled document.
- At the **End of Interview** dialog, click **Paste the assembled document into the open word processor document**. The word processor appears, showing the assembled document inserted into the existing document.

Customize the End of Interview Dialog

The buttons available at the *End of Interview* dialog will vary according to the type of document being assembled. Additionally, you can choose which buttons will

appear at the **End of Interview** dialog and what happens when you click the **Finish** button in the navigation bar. For information about which buttons are available, refer to the HotDocs Help.

To choose which options appear at the End of Interview dialog

1. At the **End of Interview** dialog, click **Choose which buttons are displayed on this dialog**. The **HotDocs Options** dialog box appears showing the **End of Interview** folder.
2. In the **End of Interview Buttons** group, choose which buttons you want on the **End of Interview** dialog by selecting the corresponding check box.

To define how HotDocs should finish an interview

1. At the **End of Interview** dialog, click **Choose which buttons are displayed on this dialog**. The **HotDocs Options** dialog box appears showing the **End of Interview** folder.
2. In the **Finish Interview Action** group, select an option for text and form documents as explained in the following table:

To	Do This
Send all assembled text documents directly to the word processor	Select Send assembled text documents to the word processor and close .
Preview all assembled text documents at the Document Preview tab of the assembly window	Select Proceed to the Document Preview tab .
Send all assembled form documents directly to HotDocs Filler	Select Send assembled form documents to HotDocs Filler and close .
Display all assembled form documents at the Form Document tab	Select Proceed to the Form Document tab .

Now, whenever you click the **Finish** button in the navigation bar, HotDocs will perform the action you specified.

Save an Answer File

By saving your answers in an answer file, you can reproduce exact copies of a document, or assemble other documents that ask the same questions. You can access saved answer files using Answer File Manager. (For more information about answer files, see the HotDocs Help.)

Tip: You can also click **Options** at the **Tools** menu.

Tip: 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 save an answer file

Tip: If you are working with an existing answer file, any changes you have made are saved.

1. At the assembly window, click the  **Save Answers** button. The **Save Answer File** dialog box appears.
2. At the **Type** drop-down list, select an answer type.
 - XML answer (.ANX) files allow the answers to be used in other HotDocs interviews. The XML format also allows them to be used to deliver information to a database, third-party application, or Internet site.
 - Standard answer (.ANS) files allow the answers to be used in other HotDocs interviews.
3. Provide a file name, title, and optional description for the answer file. This information will appear in Answer File Manager.
4. Click **OK**. The answer file is saved.

Tip: Use clear, consistent naming conventions, so you can more easily locate answer files for later use.

View a Summary of Questions or Answers

You can generate a brief summary of the questions and/or answers that are used in a completed document. You do this by viewing the Question Summary or Answer Summary for a given document.

A Question Summary shows an outline of dialogs and questions. You can print Question Summaries to use as questionnaires. An Answer Summary presents both the questions and the answers used to assemble a document. This provides a context for the answers without requiring you to read the entire document, and it can be an effective format to keep printed copies of your work.

To view a Question or Answer Summary

Tip: To hide or show the summary tabs, select (or clear) **Question Summary Tab** or **Answer Summary Tab** in the **View** menu.

- At the assembly window, click the **Question Summary** or **Answer Summary** tab. The assembly window changes to show the selected summary.

Print a Completed Document

Many projects require you to print copies of your completed documents.

To print a document

1. At the assembly window, click the **Document Preview** tab (for form templates, the **Form Document** tab). The assembly window shows a preview of the document.
2. Click the  **Print Document** button on the toolbar. The document is sent to the specified printer.

Open a Saved Document

After completing a document and saving it, you can later edit the document in the appropriate application:

- Text documents are saved as word processor files (.DOC, .WPD, or .RTF). To edit these files, you must use a word processor.
- Form documents are saved as HotDocs form files (.HPD or .HFD). To edit these files, you must use HotDocs Filler.

-- Note --

Once a document is saved, it no longer functions as an automated template. If you want to change an answer, you must manually locate each place that answer appears in the document. Also, if the answers you change were part of a calculation, you must manually recalculate the results. If you must change answers in an assembled document, it is recommended that you reassemble the document using the original answer file and make your changes during assembly.

To open a saved text document (.DOC, .WPD, or .RTF format)

1. Open your word processor.
2. Select **Open** (**File** menu).
3. Browse to the saved document and click **Open**.

To open a saved form document (.HPD or .HFD format)

1. Open HotDocs Filler by selecting **Start > Programs > LexisNexis HotDocs Player > HotDocs Filler**.
2. Select **Open** (**File** menu)
3. Browse to the saved document and click **Open**.

Section 5: Directly Fill a Form Document

Tip: To learn more about using HotDocs form templates, see the HotDocs Help. To access the HotDocs Help, select **HotDocs Help** from the **Help** menu, or press **F1**.

Overview

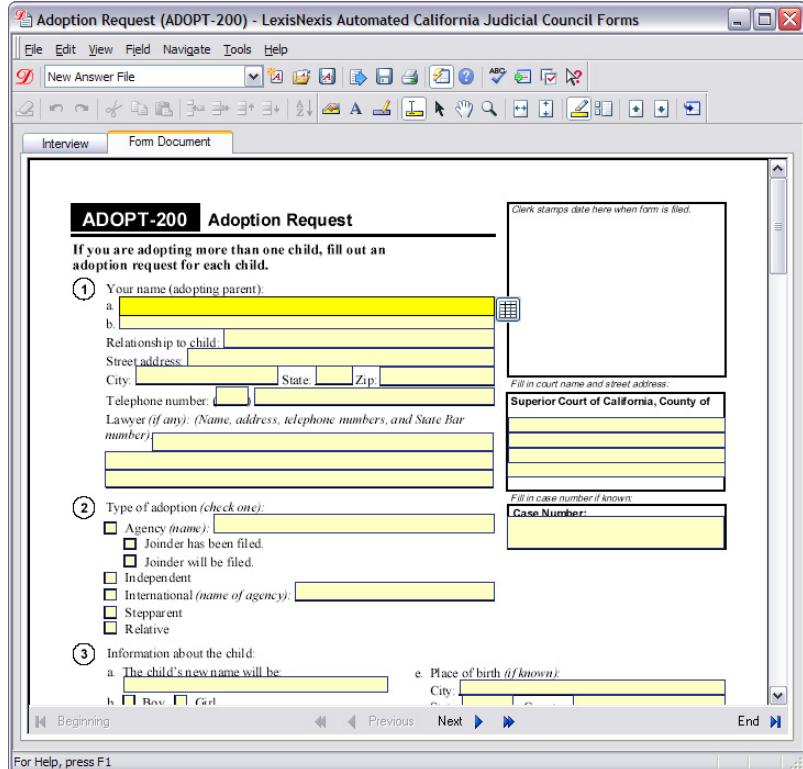
In most cases, completing form documents is exactly like completing text documents—a series of questions appear and you enter your answers. However, because the underlying text in a form template is static (meaning, it doesn't change), there are some tasks that are unique to completing form documents, such as handling answers that don't fit in the allotted space, as well as the ability to enter answers directly on the face of the form (rather than using the pre-designed interview). (For more information on working with form templates, see the HotDocs Help.)

Use Direct-Fill Assembly for a Form Template

At times, you may choose to complete a document by entering your answers while viewing the document at the **Form Document** tab. In fact, some LexisNexis Automated Forms require you to fill the form using this method.

-- Note --

While entering answers directly at the **Form Document** tab may seem quicker and easier, often important information about the answers you are entering only appears when you are viewing the **Interview** tab. Because of this, it is recommended that, where possible, you use the **Interview** tab.

**To enter answers directly on the form**

1. At the HotDocs library window, select a form template and begin assembling the document. (See “Section 4: Assemble a Text or Form Document” on page 15.)
2. If it’s not selected automatically, click the **Form Document** tab. The assembly window changes to show the form document and the answer fields.
3. Select a field. The field changes color.
4. Enter an answer, either by typing your answer or by selecting an existing option.
5. Press **Tab** to move to the next field, or use the mouse to select another field.

-- Note --

When you select certain fields, they may turn gray, not allowing you to type in the field. Instead, you can click the **Answer Wizard** button that appears to the right of the field. This will display a pop-up window where you can answer the variables needed to calculate the answer for that field.

Tip: You can also create a new field at the **Form Document** tab by clicking the **Select Tool** button, and then drawing the field on the document. To enter text in the new field, click the **Fill Tool** button. The field and text will be saved in the current document, but the answer will not be saved in your answer file and the field will not appear in other documents assembled from the same template.

Resolve Answer Field Overflow

When you type an answer in a field, HotDocs compares the size of the field and the length of the answer. If an answer uses more space than is available in that field, you are prompted to resolve the overflow.

During direct-fill assembly at the **Form Document** tab, HotDocs automatically checks each field when you move to another field. HotDocs also checks for any unresolved answer overflows when you save or print a document. In addition, you can manually check for answer overflow at any time. (For more information about answer field overflow, see the HotDocs Help.)

To check for and resolve answer field overflow

1. With the Form Document tab displayed, choose **Check for Overflow** (**Tools** menu). HotDocs begins checking answer lengths.
2. If an answer is too long, the **Overflow Status** dialog box appears. Make adjustments as explained in the following table:

To	Do This
Edit the answer to make it fit the field	Click Edit , and then change the answer.
Resize the field to make it fit the answer	Click Resize , and then change the size of the field.
Override the field type and edit the answer	Click Override , and then change the answer. (Answers typed in overridden fields are not saved in the answer file. Instead, the original answer is saved in the answer file. The original answer will also be used if it's required for answering other questions, such as calculations.)
Shrink the font size until the answer fits or the minimum font size is reached	Select Shrink the answer to fit in the field . If the answer is still too large for the field, you must select another option to resolve the overflow.
Send the entire answer to the addendum	Select Send the answer to the addendum . (See the next section, "Work with an Addendum.")
Resolve the overflow later	Click Ignore .

Work with an Addendum

The default addendum appearance may not be consistent with your project standards.

You can change the addendum items and references, as well as the fonts, spacing, headers, footers, page numbering, and page formatting. You can also choose to format the addendum as a pleading paper. (For additional information about changing addendum properties, see the HotDocs Help.)

To change the addendum format

1. At the HotDocs library window, select a form template and begin assembling the document. (See “Section 4: Assemble a Text or Form Document” on page 15.)
2. At the assembly window, click the Form Document tab.
3. Click Document Properties > Addendum (File menu). **The Addendum Properties** dialog box appears.
4. Make changes as described in the following table:

To	Do This
Include header or footer text in the addendum	Type the desired text in the Header text or Footer text field.
Control the alignment of the header or footer text	Select an option from the Alignment dropdown list in the Header properties or Footer properties group.
Control the height of the header or footer	Change the Height setting in the Header properties or Footer properties group.
Specify the addendum page margins	Specify the margin settings in the Page margins group.
Control the distance between labels and answers	Change the setting in the Indentation field.
Specify the addendum as a pleading paper	Select Number lines to format as pleading paper . HotDocs places line numbers in the left margin of the addendum.

To change the reference and label text for a specific field's addendum item

1. At the **Form Document** tab, select the field and click **Properties** (Field menu). The **Properties** dialog box appears.
2. At the **Overflow** tab, type text in the **Cross-reference text** box to specify the text that appears in the form field when the answer is sent to the addendum.
3. Type text in the **Addendum label text** box to specify the text that appears next to the answer in the addendum.

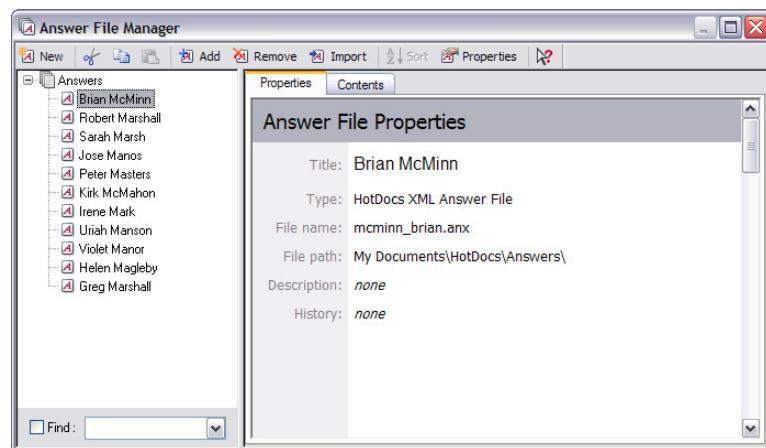
Section 6: Use Answer File Manager

Tip: To learn more about managing answer files, see the HotDocs Help. To access the **HotDocs Help**, select HotDocs Help from the **Help** menu, or press **F1**.

Overview

When you save an answer file, HotDocs adds the file to Answer File Manager. Using Answer File Manager, you can manage and use your answer files more easily.

Answer File Manager automatically tracks all the answer files you create. You can also add answer files you receive from other sources. You can modify the properties of these answer files by modifying their file names, titles, locations, and descriptions.



Answer File Manager tracks the history of when each answer file has been used. Also, at the **Contents** tab, you can view the answers currently saved in each file.

The **Sort** and **Find** features in Answer File Manager can help you locate answer files. To rearrange the order in which the answer files appear, click the **Sort** button, and then select a sorting option. To search for a specific answer file, select the **Find** check box, and then type the text for which you are searching. HotDocs filters the list of answer files to show only those that contain that text in their titles or descriptions.

Add Existing Answer Files to Answer File Manager

When you create an answer file, HotDocs automatically adds it to Answer File Manager. If you receive answer files from other sources, you must manually add those answer files to Answer File Manager. While using Answer File Manager, you can organize your answer files into folders as well as modify the properties of the answer files.

When you receive answer files that others have created, you must manually add them to your Answer File Manager.

To add an existing answer file to Answer File Manager

1. At the HotDocs library window, click the  **Answer File Manager** button. The **Answer File Manager** window appears.
2. Click  **Add**. The Add Item dialog box appears.
3. Click the  **Browse** button next to the **File name** box, and then locate and open the file.
4. Type a name for the answer file in the **Title** box or click the  **Get Title** button to use the default title (if any). This title will identify the answer file in Answer File Manager.
5. Optionally, type a description in the **Description** box to help you identify the answer file. This description appears at the **Properties** tab of Answer File Manager and can be used when searching for specific answer files.

Note

You can also double-click an answer file in Windows Explorer to automatically copy it to your answer file folder and add it to Answer File Manager.

Tip: You can add multiple answer files at one time. When browsing for files, you can press **Ctrl** or **Shift** to select multiple files. Or, typing a folder path, you can select all files in the folder by using the following format in the file name box: *C:\folder path*.ANS*.

Create a Folder

You can organize your answer files by creating folders and subfolders.

To create a folder in Answer File Manager

1. At the Answer File Manager window, click the  **Add** button. The **Add Item** dialog box appears.
2. Select **Folder** from the **Type** drop-down list. The dialog box changes to show the options needed for new folders.
3. Type a name for the folder in the **Title** field.
4. Optionally, type a description about the folder in the **Description** box. (This description will appear at the **Properties** tab of Answer File Manager.)
5. Click **OK**. The folder is added to the answer library.

Manage Your Answer Files

When you are viewing Answer File Manager, you are not viewing the actual answer files—instead, you are viewing *references* to the actual answer files, similar to Windows shortcuts on your computer desktop.

Because of this, use caution when moving answer files on your workstation, or changing file paths in Answer File Manager. If the file path does not match the actual file location, you will be unable to access that answer file.

To manage your answer files

1. 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.
Delete an answer file	Select the answer file, and then click the  Remove button.
Sort answers in alphanumeric order, based on titles	Select a folder, and then click the  Sort button.
Search for a specific answer file	Select Find . In the text box type some text from the answer file's title or description.
View the answers currently saved in the answer file	Select the answer file, and then click the Contents tab.
Find when an answer file was used to assemble documents	Select the answer file, and then click the Properties tab.
Change the title, path, file name, history, or description	Select the answer file, click the  Properties button, and make the changes.
Change a folder's title or description	Select the folder, and then click the  Properties button and make the changes.
Delete a folder	Select the folder, and then click the  Remove button.
Move an answer file to a different folder	Double-click the folder to open it, and then select the answer file and drag it to the folder.

Glossary

Addendum – pages added to a form document to show answers that don't fit in the form fields.

Answer file – a file that contains the information used to assemble a document.

Answer File Manager – the tool used to organize and access answer files.

Answer source – a file that contains answers provided during an intake interview; you can use these answers when assembling other documents.

Answer Summary – an outline showing the dialogs, questions, and answers used to assemble a document.

.ANS – the file name extension for a standard HotDocs answer file. See also *.ANX*.

Answer wizard – a special button that appears next to an answer field in a form document. Clicking this button displays dialogs to help you answer the question.

.ANX – the file name extension for a HotDocs XML answer file, which uses an open file format useful for delivering information to a database, a third-party application, or an Internet site. See also *.ANS*.

Assembly – the process of completing an interview; providing information for a HotDocs template in order to generate a document.

Automated form – a HotDocs template containing variables.

Clause – a section of standard text that can be used in various documents.

Clause library – a collection of clauses where users can select specific paragraphs or sections of text to be added to a document.

Dialog – a group of related questions in an interview.

Direct-fill assembly – the process of typing information directly in answer fields on a form template. See also *Interview*.

Document – paperwork used in your practice; prepared by providing answers for a HotDocs template during an interview.

Field – a block on a form template prepared to hold answers.

Field overflow – a situation in a form document where the provided answer is larger than the space available in the field.

File name extension – the final letters of a file name that specify the file type, *.DOC*, for example.

Fill – provide answers for a HotDocs form document.

Forms set – a collection of HotDocs templates, distributed by LexisNexis.

Form document – a document that contains all the answers required to be completed. A *form* document's underlying text is static, meaning it cannot be altered or changed. See also *Text document*.

Form template – a file that contains special fields (or variables) where answers will be merged to produce a completed document. A *form* template's underlying text is static, meaning it cannot be altered or changed. See also *Text template*.

.HFD, .HPD – the file name extensions of completed HotDocs form documents.

History – a record of when and with which templates an answer file has been used.

HotDocs® Filler – an application that lets you edit saved form documents.

HotDocs® PDF Advantage – an application that allows you to save assembled text and form documents as PDF files.

HotDocs® Player – an application that lets you assemble published HotDocs templates.

Intake Interview – the process of providing answers for an interview template, gathering information into an answer source for quick access later.

Interview – a series of grouped questions you must answer in order to produce a completed document.

Interview template – a special kind of HotDocs template that gathers answers for use with other documents. It produces an answer file instead of a document.

Library – a collection of HotDocs templates, clauses, or answer files.

Navigation – moving from dialog to dialog during a HotDocs interview.

Pleading paper – a format that can be applied to a form document's addendum, where line numbers are printed in the left margin.

Question Summary – an outline showing the dialogs and questions in a template that need to be answered to complete a document.

Repeated dialog – a HotDocs dialog that repeatedly asks the same questions, gathering a list of information.

Template – a HotDocs file where instances of variable text have been replaced with HotDocs variables.

Text document – a document that contains all the answers required to be completed. A *text* document is viewed using a word processor. See also *Form document*.

Text template – a file that contains special fields (or variables) where answers will be merged to produce a completed document. A *text* template is created and edited using a word processor. See also *Form template*.

Title – the name associated with a given file to help you identify it in its corresponding library.

Variable – a special field in a HotDocs template where information that changes—depending on the user—is merged.