

LexisNexis®

Assembling UK HotDocs Documents

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## Installing HotDocs

### What Is HotDocs?

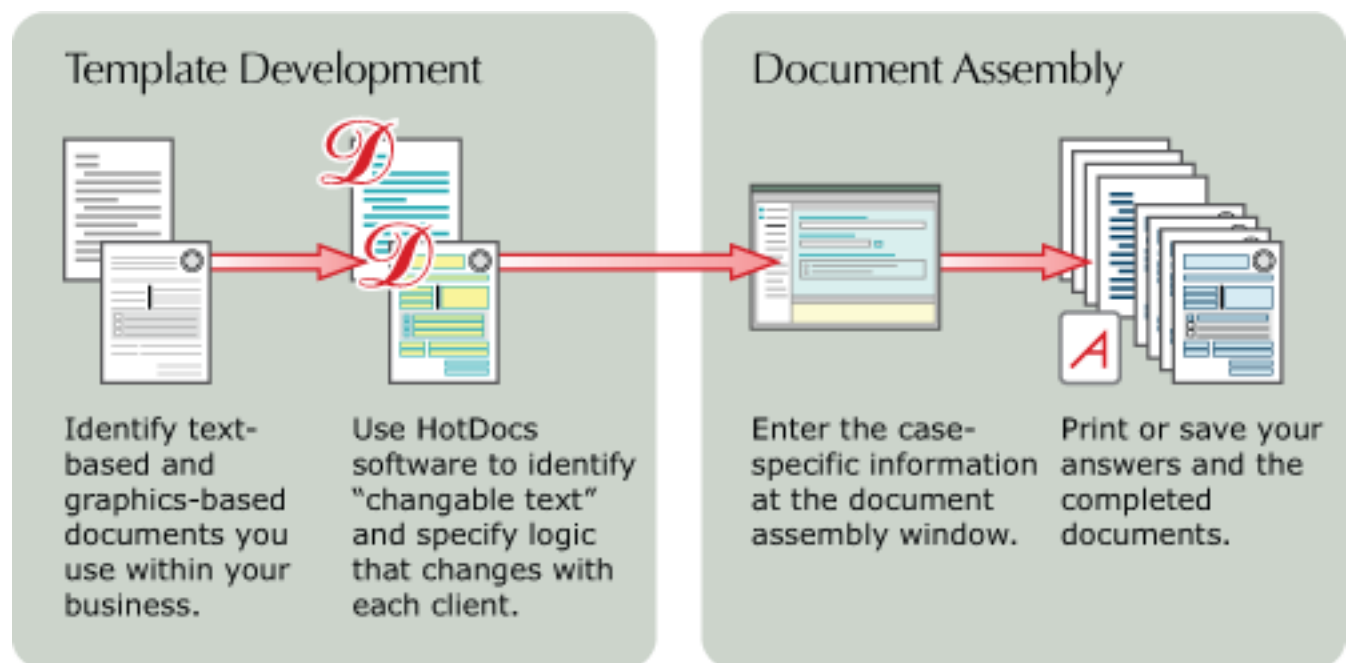
HotDocs is an award-winning software application that significantly reduces the time spent generating customized documents, such as contracts, sales proposals, government and court forms, legal documents, loan applications, and medical forms.

Using HotDocs, you can transform any word processor file into an interactive template by marking changeable text with HotDocs variables. Then, the next time you want to generate a completed text document, just assemble the interactive template you've created. As you do this, you will be prompted for the information needed in the document and that information will be merged into the document.

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

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

The following diagram shows the HotDocs process, from template development to document assembly:



## System Requirements

To ensure the best performance using HotDocs, please note the following requirements for hardware and software:

### Hardware

- 900 MHz processor (2GHz, recommended)
- 256 MB RAM
- 25 MB hard disk storage
- 1024 x 768 screen resolution with at least 16-bit color

### Software

- Microsoft Windows 2000 (SP3 or higher), Windows XP, or Windows Vista
- Microsoft Internet Explorer 6.0 or later
- Microsoft Word 97, 2000, XP, 2003, or 2007
- Corel WordPerfect 8, 9, 10, 11, 12, X3, or X4

**Caution:** Microsoft Word 97 is not supported for use with HotDocs on Windows Vista. Additionally, WordPerfect X3 SP2 and later are the only versions of WordPerfect supported for use on Windows Vista.

### Databases

If you plan to integrate HotDocs with a database, you must have one of the following applications or servers installed:

- Microsoft Access
- Microsoft SQL Server
- Oracle 8i or 9i with the OraOLEDB OLEDB provider
- Most other ODBC-compliant database

## Install HotDocs

When you download the HotDocs Player and run the executable, HotDocs prompts you for all of the information it needs to complete the process.

Before installing HotDocs, make sure your computer meets the minimum requirements necessary for using HotDocs. (See *System Requirements*.)

### To install HotDocs

1. Close all open programs, especially any word processors or existing versions of HotDocs you may have open.
2. Insert the HotDocs installation CD into your CD-ROM drive. The CD browser window appears.
3. Click **Install HotDocs Player Edition** . The installation program begins installing HotDocs.
4. Follow the on-screen prompts to complete the installation.

#### Note:

- To manually install HotDocs, select **Run** from the **Start** menu and type **D:\setup**. (Substitute the correct drive letter if your CD-ROM drive is not mapped to **D:\**.) Follow the on-screen prompts to complete the installation.
- For a description of how HotDocs is installed, see *Understand HotDocs Installation*.

## Understand HotDocs Installation

When you install HotDocs, two different installations actually happen—the *HotDocs Setup* and the *Current User Setup*. This two-part installation process not only allows the program be installed just once for multiple users on a single workstation, but it also allows each user who logs on to the workstation to have his or her own custom files and settings.

### HotDocs Setup

When you first install HotDocs from *Setup.exe* (see *Install HotDocs*), HotDocs installs the program files needed to use HotDocs, including any executable files used to run HotDocs. Among others, it also installs the HotDocs Help files. These files are installed, by default, to *C:\Program Files\HotDocs 6*. This location is not user-specific, which allows all users of a single workstation access to the files.

As HotDocs installs these files, it registers information about them in the *Local Machine* key of the Windows System Registry. For example, the Registry stores information about where the executable file for HotDocs is located on disk, as well as which word processors HotDocs supports. It also sets some preliminary file location information for the various files HotDocs uses, including information about library files and template set files. All of this information must be registered in order for HotDocs to work correctly.

### Current User Setup

When you install HotDocs, the installation creates a folder named *Source* in the HotDocs program folder. This folder contains several files, including word processor macro or startup files and the user spell-checking dictionary. These files must be in user-specific folders on the disk. However, because multiple users may use a single workstation, HotDocs Setup doesn't install these files. Instead, when a user logs on to the workstation and runs HotDocs, the *Current User Setup* copies these files to the correct locations for the user. (See *Default File Locations in HotDocs 2008*.)

The *Current User Setup* also registers information about each user in the Current User key of the System Registry. This information includes default file locations for such things as templates, answer files, and library files. As each user specifies preferences for working with HotDocs, these settings are likewise written to the *Current User* key. This allows each workstation user to have his or her own HotDocs settings without other users overriding those preferences with their own.

The *Current User Setup* happens each time a user starts HotDocs. This means that each time you run HotDocs, HotDocs checks to make sure all of the required files (such as word processor startup files) are located where it expects to find them. If the file isn't found, HotDocs replaces it using a copy it finds in the Source folder.

### Restore Installation Defaults

At times, you may want to restore default settings in HotDocs. You can accomplish this by clearing the *Current User* key of the Registry.

## Default File Locations in HotDocs 2008

When you install and use HotDocs, the program makes several entries in the System Registry that indicate to HotDocs where to look for files, as well as where to suggest you save files. (See *Understand HotDocs Installation*.) In most situations, HotDocs uses this information each time you perform a task in HotDocs. For example, each time you create a new template, HotDocs suggests a default location for the new template, based on the information it finds in the System Registry.

The following is a list of these default locations:

**Caution:** In Windows Vista, the *My Documents* folder has been renamed as *Documents*. The *All Users Documents* folder has been renamed as *Public Documents*.

File Type	Default Location
Program Files	C:\Program Files\HotDocs 6
Help Files	Program Files\HotDocs 6
Spelling Dictionary File	My Documents\HotDocs\Spelling
Library Files	My Documents\HotDocs\Libraries
Template Files	My Documents\HotDocs\Templates <div style="border: 1px dashed yellow; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> Even though HotDocs saves all template types to this folder, it still maintains separate default settings for text templates, form templates, and interview templates.</p> </div>
WordPerfect Macro Files	Word Processor Macro Folder
MS Word Startup Files	Word Processor Startup Folder
Template Sets	All Users Documents\HotDocs\Templates
Text Document Files	Word Processor Documents Folder
Form Document Files	My Documents
Answer Files	My Documents\HotDocs\Answers
Catalog Files	All Users Documents\HotDocs\Catalogs

If you need to change these default locations after HotDocs is installed, you can do so at HotDocs Options.

**Caution:**

- If you are upgrading from HotDocs 6.1 or earlier and your libraries are saved in the HotDocs 6 Program Files folder, HotDocs will set this folder as the default location for libraries. If you do not have library files saved here, HotDocs will use *My Documents\HotDocs\Libraries*.
- If you perform a custom installation, HotDocs will install files and set registry entries using the information you specify during installation. Whatever settings you specify during installation will be used for all users of the workstation.

## Uninstall HotDocs

You can remove existing versions of HotDocs from your computer by using the HotDocs uninstall program. When you uninstall, all of the program files are removed from your computer. However, the program does not remove any custom templates, libraries, or answer files you have created.

### To uninstall HotDocs

1. At the **Start** menu, select **Settings > Control Panel**. The **Control Panel** dialog box appears.
2. Click **Add or Remove Programs**. The **Add or Remove Programs** dialog box appears.
3. Select the version of HotDocs that needs to be removed, then click **Remove**. The HotDocs uninstall process starts.
4. Follow the on-screen prompts to remove the program.

**Caution:** If you plan to reinstall HotDocs to restore default settings, you must delete the user-specific settings HotDocs entered in the *Windows System Registry*.

## Working with Assembled Form Documents

### **Overview: Assemble a Form Document**

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

## Enter Answers Directly at the Form Document Tab







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

### To enter your answers directly into the fields

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









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

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

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

**Move through the answers in a document**

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

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



**Note:**

- To access answer wizards, table wizards, and calendars during direct-fill assembly, right-click on the field and choose the option from the shortcut menu. For example, to view the calendar for a date field, right-click on the field and choose **Calendar** from the shortcut menu.
- Some answers may be too large to fit in the field. If this happens, HotDocs warns you by displaying the **Overflow Options** dialog box. See *Check Form Fields for Answer Overflow*. Similarly, you can specify when this warning should appear.

## View the Assembled Form Document

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

### To view assembled form documents

1. At the HotDocs library window, select a template and begin assembling the document.
2. After answering the questions in the interview, click the **Form Document** tab. The assembly window changes to show the assembled document.
3. Optionally, select a field and enter a different answer. (See *Enter Answers Directly at the Form Document Tab*.)
4. Once you have finished entering answers, complete any of the following options:
  - Click the  **Save Document** button to save the assembled form document to disk. (See *Save an Assembled Text or Form Document*.)
  - Click the  **Print Document** button to print the assembled form document. (See *Print an Assembled Form Document*.)
  - Click **Send Document To > Mail Recipient** (**File** menu) to attach the assembled form document to an e-mail message.
  - Click **Close** (**File** menu) to close the assembly window. HotDocs prompts you to save any changed answers.

**Note:** See *Overview: Assemble a Form Document* for a list of changes you can make to an assembled form document.


## Override an Answer in a Form


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

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

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

### To override an answer

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


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

## Print an Assembled Form Document

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

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

### To print a form document

1. At the HotDocs library window, select a template and begin assembling the document.
2. After providing the required answers, click the **Form Document** tab. The assembly window changes to show the assembled document.
3. Click the  **Print Document** button.
4. If you are printing a HotDocs form document (or .HFD file), select any of the following printing options. (If you're printing a PDF form document, skip to step #5.)
  - To print the form and answers, select **Form with Answers** in the **Output** group.
  - To print only the static text of the form, select **Form Only (Blank Form)** in the **Output** group.
  - To print the answers onto a pre-printed copy of the form, select **Answers Only (Use Preprinted Form)** in the **Output** group.
  - To change the double-sided printing options, select the desired option. **Single-sided** prints the document using one side of each sheet of paper. **Double-Sided, Side-to-Side** prints the document with the tops of both pages at the same end of the paper, like a traditional book. **Double-Sided, Top-to-Bottom**, prints the document with the bottom of the second page at the same end as the top of the first page, like a flip-chart.
5. If you are printing a PDF form document (or .HPD file), you must choose whether to print using the functionality of HotDocs or Adobe Acrobat.

- Choose **HotDocs**, which prints at a slower speed but provides a wider range of printing options.

Choose **Adobe Acrobat**, which prints at a faster speed but provides few printing options.

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

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

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

## Choose Default Form Printing Options for a Form

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

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

### To specify form printing options

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

**Note:** You can use command-line options to control the paper size and paper source.





## Edit a Saved Form Document

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

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

### To work with a saved form document in Filler

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

To	Do This
<b>Change an answer in a field</b>	<p>Click on a field. The field becomes active, allowing you to enter an answer.</p> <div style="border: 1px dashed red; padding: 5px;"> <p><b>Caution:</b> You can edit answers in a saved form document, but you must re-evaluate any computations or conditions affected by changed answers. Similarly, changes you make are not reflected in the answer file used to assemble the document.</p> </div>
<b>Create new fields</b>	<p>With the  <b>Select Tool</b> button selected, press the left mouse button and move the mouse pointer to draw a rectangle. To type in this field, select the  <b>Fill Tool</b> button.</p> <p>The fields you create in Filler have no variable associated with them. They are simply text boxes where you can type information.</p>
<b>Print the document</b>	Click the  <b>Print</b> button.
<b>Open a different HotDocs form file</b>	Click the  <b>Open</b> button, and then locate the desired file. (You can also press <b>Ctrl+O</b> .)

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

- Insert a graphic into a field. (See *Insert a Graphic File in a Form.*)
- Cross out static text on the form. (See *Cross Out Static Text on the Form.*)
- Circle static text on a form. (See *Circle Static Text on a Form.*)

## Create a Form Field


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

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

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

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

### To create a form field

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


#### Note:

- To move multiple fields once they have been created, select the fields and press the arrow key that indicates which direction you want to move them. To move fields more quickly, press the **Shift** key while pressing the arrow keys.
- You can also create a standard-size field by double-clicking on the form. Or, you can click to set the field cross-hair and press **F8**.

## Select a Field


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

### To select fields

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


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

#### Note:



- If you have trouble selecting the field you want, the field may be in a group. If this is the case, you must first ungroup the fields by clicking **Ungroup (Field menu)**. (See *Ungroup Form Fields*.)
- Click the  **Show Fields** button to show and hide field colors.

## Detect Borders to Create or Resize a Field

When you create fields on a form, you often use the underlying static text as a guide as to where the field should be placed. Often, you want the borders of the fields to match the borders of the static text. To help

you align these borders, you can use the  **Detect** feature. This feature is useful both when you create a new field and when you need to resize a field to fit within its allotted space.

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

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

### To detect the borders of the underlying static text

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

## Move a Field on a Form

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


### To move a field using the mouse

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

### To move a field using the keyboard

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

### To move a field using the Position/Size dialog box

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


#### Note:

- If a field you want to move is part of a group, you must first ungroup the fields. (See *Ungroup Form Fields*.)
- The **Field Properties** dialog box includes the **First**, **Previous**, **Next**, and **Last** buttons to move you between fields. When you have multiple fields selected, these buttons are not available.

## Change the Borders and Margins of a Field

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

### To change field borders or margins

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

## Copy One or More Form Fields

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

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

When you copy fields to a new location, the cursor position tells HotDocs where to paste the copied fields. If you copy a single field, the lower-left corner of the field will be at the cursor position. Likewise, if you copy two or more fields at the same time, the lower-left corner of an invisible boundary box drawn around all of the copied fields will be at the cursor position. If there is no cursor, the field is pasted on top of the original.

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

### To copy and paste one or more fields

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

**Note:** You can also copy a field by holding down the **Ctrl** key while dragging the field to its new location.

## Resize Form Fields

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


### To resize a field using a mouse

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

### To resize a field using the keyboard

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

### To resize a field using the Field Properties dialog box

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

## Change the Tab Order of Fields

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


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

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

The following rules control field ordering:

- Fill order is determined first by row, then by column.
- All field values are initially set the same—Row 0, Column 0.
- When fields have different row numbers, fields with lower row numbers are asked first, for example, Row 0, Column 0; Row 1, Column 0; etc.
- When fields have the same row numbers, but different column numbers, fields with lower column numbers are asked first, for example, Row 1, Column 0; Row 1, Column 1; etc.
- Fill order is treated separately for each page of the template—you cannot specify a fill order that runs from one page to another.

### To change the tab order for fields

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

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

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

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

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

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

### To flow an answer across multiple fields

1. Edit a form document. (See *Edit a Saved Form Document*.)
2. Create all the text fields across which the answer should flow. (See *Create a Form Field*.)
3. Select all the fields that will be used for the answer. (See *Select a Field*.)
4. Click **Group (Field)** menu). A bounding frame appears around the grouped fields. (You can also right-click and select **Group** from the shortcut menu.)

**Caution:** When fields are grouped, you cannot change properties for individual fields. You must first ungroup the fields. (See *Ungroup Form Fields*.)

## Ungroup Form Fields

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

### To ungroup the fields

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


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

## Change the Font Used for a Field

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

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

### To change the font for a field or group of fields


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

**Note:** You can specify default font properties for all new fields you create at **HotDocs Options**.

## Format Lines and Paragraphs of Text in a Form Field

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

### To format lines and paragraphs


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

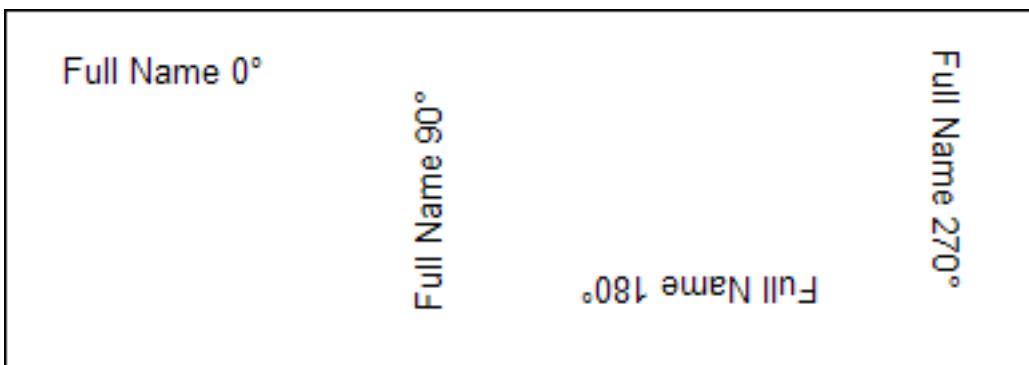
To	Do This
<b>Indent the first line of text in the paragraph</b>	Enter how much space to include between the margin of the field and the first character of the answer in the <b>First line indent</b> box. (You can either type the number or click the up or down arrows.)
<b>Force a certain number of lines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

## Rotate Answers in a Field

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

### To rotate text in a field


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



## Keep Contents of Form Fields from Printing

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

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


1. Edit a form document. (See *Edit a Saved Form Document*.)
2. Create or select the field whose text you want to appear only on the form.
3. Click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. At the **Type** tab, select **Non-printing field**.

## Cross Out Static Text on the Form

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

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


### To create a strike-through field in a form

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

## Circle Static Text on a Form

Sometimes instructions on a form ask users to circle a preprinted option. Rather than make users print the form and manually circle the option using a pen, you can create a form field that overlays a circle on the text. You can attach a variable to the field so that the user can select which option should be circled during the interview. Creating circle fields not only preserves the professional look of the form, but allows the answer associated with the selection to be saved in the answer file.



### To create a field that circles text

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

## Insert a Graphic File in a Form

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

### To create a graphic field without using a variable

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

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

## Convert Answers on the Form to Bar Code Format

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


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

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

Use the following tips when working with bar codes:

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

### To create a bar code using predefined text

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

For example, Aberdare County Court~4th Floor~Crown Buildings~Green Street~  
Aberdare~Wales~CF44 7DW


#### Note:

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

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

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

### To group fields on separate pages

1. Edit a form document. (See *Edit a Saved Form Document*.)
2. Create the first field in the series of spanned fields. (See *Create a Form Field*.)
3. Select the field and click the  **Field Properties** button. The **Field Properties** dialog box appears.
4. Click the **Overflow** tab, and in the **Group name** box, enter a name. It can be any text as long as it is the same for each field in the group.
5. On the following page(s), create the fields that will contain any overflow.
6. Repeat the preceding steps for each field in the group, using the same group name as you assigned to the first field.

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

## Check Form Fields for Answer Overflow

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

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

### To manually check for field overflow

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

To	Do This
<b>Reduce the answer's font size to the minimum size allowed for the field</b>	Select <b>Shrink the answer to fit in the field</b> . The answer's font size is reduced to a smaller point size. If the answer still doesn't fit in the answer field, you must choose another option for resolving the overflow.
<b>Send the answer to the addendum and insert cross-reference text in the answer field</b>	Select <b>Send the answer to the addendum</b> . The answer is moved to the addendum. HotDocs then merges text in the field that indicates the answer can be found in the addendum.  Select <b>Split answer</b> if you want only the part of the answer that doesn't fit in the field to be sent to the addendum.
<b>Change the text of the answer, such as reduce the number of words in the answer</b>	Click <b>Edit</b> . HotDocs highlights the field that contains the answer so you can edit the text.  Once you edit your answer, click back on the <b>Overflow Status</b> dialog box to have HotDocs recheck the overflow.
<b>Make the answer field larger</b>	Click <b>Resize</b> . HotDocs selects the field so you can click one of its handles to resize it.  Once you resize the answer field, click back on the <b>Overflow Status</b> dialog box to have HotDocs recheck the overflow.

<p><b>Override any settings or formats of the field and enter any text in the field</b></p>	<p>Click <b>Override</b> and enter the text you choose in the field.</p> <p><b>Note:</b> Overriding a field does not change the original answer. In fact, HotDocs continues to use the original answer in any calculations or scripts that require it. It also saves the original answer to the answer file. Choosing to override a field simply allows you to define only the text that needs to appear on the form.</p> <p>Once you override the answer field, click back on the <b>Overflow Status</b> dialog box to have HotDocs recheck the overflow.</p>
<p><b>Resolve the overflow at a later time</b></p>	<p>Click <b>Ignore</b>. The <b>Overflow Status</b> dialog box is closed and you are able to work with other answer fields in the document. If you click on the overflowing answer field again, or if you check for answer overflow, you will be asked to resolve the overflow again.</p>
<p><b>Resolve the overflow on your own</b></p>	<p>Choose <b>Close</b>. HotDocs highlights the overflowing field so you can change the answer in whatever way you choose.</p>

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

**Note:** You can prevent HotDocs from checking for field overflow during assembly.

## Customize the Look of the Addendum

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

### To change the addendum format

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

To	Do This
Define how much white space there is between the addendum page edges and the text in the addendum	Enter the dimensions in the <b>Page margins</b> group.
Define the text that appears at the top of each addendum page	Enter the text in the <b>Header text</b> box.
Define the text that appears at the bottom of each addendum page	Enter the text in the <b>Footer text</b> box.
Change the font properties (including font face, size, and style) of the header or footer text	In the respective <b>Header properties</b> and <b>Footer properties</b> groups, click the <b>Font</b> button and make the changes at the <b>Font</b> dialog box.
Define how much vertical space the header or footer text requires	In the respective <b>Header properties</b> and <b>Footer properties</b> groups, enter a number in the <b>Height</b> box.
Change the alignment of the header or footer text	In the respective <b>Header properties</b> and <b>Footer properties</b> groups, click the <b>Alignment</b> button and choose your alignment option.
Define the font properties (including font face, size, and style) for answers that appear in the addendum	In the <b>Addendum entries</b> group, click the <b>Font</b> button and make your changes at the <b>Font</b> dialog box.
Define how much space there should be between the addendum label and the answer	In the <b>Addendum entries</b> group, enter a number in the <b>Indentation</b> box.
Define how much space there should be between each answer in the addendum	In the <b>Addendum entries</b> group, enter a number in the <b>Space between</b> box.
Make the addendum appear as a pleading paper	Select <b>Number lines to format as pleading paper</b> .

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

addendum to the Windows Clipboard (choose **File > Send Addendum To > Clipboard**) to paste it into a different program for editing.

## Define Overflow Properties for a Regular Field


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

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

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

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

### To set overflow properties for regular fields

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


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

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

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

If you allow the user to choose whether to split the answer between the form and the addendum, you can customize the reference and label text, based on their selection. For example, if the user chooses to send the entire answer to the addendum, you can specify *See Addendum 1* as the cross-reference text. However, if the user chooses to send just part of the answer, you can specify *Continued in Addendum 1* as the reference text.

### To choose overflow options for a multi-line answer

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

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

## Answer Files: Saving Answer Files

### **Overview: Save Answers**



When you assemble a document, you can save the answers you enter in an answer file, which can then be used later to recreate the same document or assemble other documents that require the same information.

For example, perhaps you are creating several estate planning documents that require much of the same information, like names, addresses, and important dates. You can save your answers in an answer file and then use that answer file when assembling other estate planning documents. This eliminates the need to re-enter information you've already provided. Answer files can be saved as standard answer files (.ANS), or as XML answer files (.ANX).

## Create an XML Answer File

At times, you may need to save answers to a database, a third-party program, or an Internet site using HotDocs Server. HotDocs lets you save answer files in XML format so you can integrate your answers with any of these types of programs.

### To save an answer file in XML format

1. At the HotDocs library, select a template and assemble the document.
2. After completing the interview, click the  **Save Answers** button. The **Save Answer File** dialog box appears.
3. At the **Type** drop-down box, select **HotDocs XML Answer File (.anx)**.
4. Enter a file name in the **File name** box. If you want to save the answer file in a folder other than the *Answers* folder, click the  **Browse** button and select a location.
5. Enter a title in the **Title** box, and a description in the **Description** box. (The description will appear at the **Properties** tab of the Answer File Manager. When searching for specific answer files, you can search for text in the description.)
6. Click **OK**. The answers are saved with the .ANX file name extension.



**Caution:** Only people who have a solid understanding of XML should attempt to manually modify the contents of an XML answer file. That said, XML answer files are text based, so they can be created and edited with any text editor. If you manually create an XML answer file, most answers can appear in any given order. However, answers that are part of a repeated dialog must appear in the same order as they appear in the dialog.

## Create a Default Answer File

When certain answers are used frequently in a specific document, you can have those answers automatically inserted each time you assemble the document. To do this, create a default answer file for that document.

A default answer file must be saved to the same folder as the template's component file. It must also have the exact same file name as the component file, but the file name extension must be either .ANS or .ANX. In most cases, the file name and path for the component file are identical to the file name and path for the template file. (The exception would be if the template is pointing to a shared component file, in which case you would use the shared component file name.) You can find this information on the **Properties** tab of the HotDocs library window.

### To create a default answer file for a document




1. At the HotDocs library window, select a template and begin assembling the document, using a new answer file.
2. Type information for only the answers you want to be default answers.
3. Click the  **Save Answers** button. The **Save Answer File** dialog box appears.
4. At the **File name** box, click the  **Browse** button and locate the folder that contains the component file. Then type the same file name, followed by an answer file name extension (either .ANS or .ANX). For example, if the component file is named *Invoice.cmp*, the answer file name would be *Invoice.ans*.
5. In the **Title** box, type a name for the default answer file.
6. Optionally, in the **Description** box, type a description for the answer file.

The next time you assemble the document, HotDocs automatically inserts the answers from the default answer file into the template's answer fields. You can then modify the answers as necessary and save a new answer file. (See *Create a New Answer File*.)


## Suggest an Answer File for Every Assembly

You may use a certain answer file more frequently than any others. You can select an option that will automatically suggest that answer file every time you assemble a document.

### To suggest an answer file for every assembly

1. At the HotDocs library window, select a template and click  **Assemble**. The **Answer File** dialog box appears.
2. Click the  **Open Answer File** button. The **Open Answer File** dialog box appears.
3. Choose an answer file and click  **Select**. The **Answer File** dialog box appears again.
4. Select **Automatically select this answer file for use with the next assembly**, then click **OK**.


The next time you assemble any document, the same answer file will automatically be selected at the


**Answer File** dialog box. To change the answer file, click the  **Open Answer File** button and choose a different file.

## Save an Answer File During Assembly


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

### To save answers during assembly

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

To	Do This
<b>Choose the format for the answer file</b>	Click the <b>Type</b> drop-down button and select an answer file format. Your options include <b>.ANS</b> (native HotDocs format) and <b>.ANX</b> (XML-based format).
<b>Enter the file name</b>	At the <b>File name</b> box, enter a name. When you click <b>OK</b> , the answer file will be saved to the default <i>Answers</i> folder and a reference to it will be added to Answer File Manager.  To save the answers to a location other than the default <i>Answers</i> folder, click the  <b>Browse</b> button and navigate to the location.
<b>Enter the title that identifies the answer file in Answer File Manager</b>	At the <b>Title</b> box, enter a name or accept the suggestion HotDocs makes.
<b>Add information to help identify the file</b>	At the <b>Description</b> box, type notes about the answer file's purpose or contents. (The description will appear at the <b>Properties</b> tab of the Answer File Manager. When searching for specific answer files, you can search for text in the description.)



#### Note:


- See *Overview: Use Answer Management* for information on using Windows Explorer instead of Answer File Manager.
- The  **Save Answers** button may be disabled because the template provider wants to prevent the answer file from being altered. You can assemble a document using new answers, but when you close the assembly window, the new answers are automatically discarded.

## Switch Answer Files During Assembly

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

### To switch answer files

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

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

## Attach an Answer File to an E-mail Message

After gathering information in an interview, you may need to send those answers to another user. You can do this by attaching the answer file to an e-mail message.

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


### To attach an answer file to an e-mail message

1. At the HotDocs library window, select a template and begin assembly.
2. After completing the interview, click **Send Answers To** (**File** menu). The **Send Answers to Mail Recipient** dialog box appears.
3. In the **Attachment name** box, enter a name for the answer file attachment. Make sure to leave the file name extension on the attachment name.
4. Optionally, if you want the answers to be in XML format, select **XML Format**.
5. Click **OK**. HotDocs opens an e-mail message and attaches the answer file.

## Spell Check Answers

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

### To spell check your answers

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

To	Do This
Ignore the current instance of the word and continue spell checking	Click <b>Ignore</b> .
Ignore all instances of the word and continue spell checking	Click <b>Ignore All</b> .
Correct only the current instance of the word and continue spell checking	Select an existing replacement from the <b>Change to</b> list (or type the replacement in the <b>Change to</b> box) and click <b>Change</b> .
Correct all instances of the misspelled word and continue spell checking	Select an existing replacement from the <b>Change to</b> list (or type the replacement in the <b>Change to</b> box) and click <b>Change All</b> .
Add the word to your personal dictionary so that the spelling checker will not question the word again	Click <b>Add</b> .
Display additional spelling alternatives for the unrecognized word	Click <b>Suggest</b> . A deeper search takes longer but produces better possible replacements. If the button is unavailable, HotDocs is searching at the deepest level.
Change your spell checking options, such as which words the spelling checker looks at and how it determines whether a word is a possible replacement	Click <b>Options</b> . (You can also change your options at the <b>HotDocs Options</b> dialog box.)

## Answer Files: Using Answer File Manager

### **Overview: Use Answer Management**

By default, each answer file you create or use is managed through the Answer File Manager. The Answer File Manager is similar to the HotDocs template library in that it allows you to organize your answer files according to project specifications. It also lets you sort and search for answer files.

At times you may prefer to not use the Answer File Manager. For example, you can manage answer files using a document manager instead of Answer File Manager. Or, if you have multiple users accessing the same set of answer files, you can use Windows Explorer, since only one person can have write access to Answer File Manager. (All other users have read-only access, which keeps them from saving or adding answer files to the answer library.)

## Open and Close Answer File Manager

When you use Answer File Manager to manage your answer files, you have greater control over the organization of your files (see *Work with Answer File Manager*). To use Answer File Manager, however, you must first open it.

### To open Answer File Manager

- At the HotDocs library, click the  **Answer File Manager** button. **Answer File Manager** appears.


### To close Answer File Manager

- At Answer File Manager, click the **X** in the upper-right corner of the dialog box.


**Note:** You can also open Answer File Manager by choosing **Answer File Manager** at the **Tools** menu. To close Answer File Manager using the keyboard, press **Alt+F4**.

## Add an Answer File to Answer File Manager




Answer File Manager allows you to organize your answer files. When you save your answers after an interview, a reference to the file is automatically added to Answer File Manager. When you need to use answer files that someone else has created (or if you have created them while using Windows Explorer to manage your files), you must add the files to Answer File Manager.

There are two ways to add an answer file to an answer library. You can import the answer file or you can add it using the  **Add** button.


### To import an answer file

1. At Answer File Manager, click  **Import**. The **Import Answer File** dialog box appears.
2. Browse to and select the file you want to import. HotDocs confirms you want to import the file.
3. Click **Yes**. The answer file is added to Answer File Manager. The file is also automatically included in any answer file drop-down lists.

### To add an answer file to Answer File Manager using Add

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

#### Note:

- If the answer file is located in folder other than the default *Answers* folder, you can import the file, which copies the file to the default *Answers* folder and adds it to Answer File Manager. To do this, click  **Import** and then locate the answer file.
- When adding files to the library, press **Ctrl** or **Shift** to select multiple files at once.






## Work with Answer File Manager





Answer File Manager helps you organize answer files, much like a HotDocs library helps you organize templates and clause libraries.

When you save answer files, they are added to Answer File Manager. Once added, you can organize the files and modify the properties of the files. In addition, you can view an answer file's history—a list of dates and times the answer file was used, including the template with which it was used. Finally, the Answer File Manager lets you preview the answers currently saved in an answer file.

### To display the Answer File Manager

1. At the template library, click the **Answer File Manager** button. The **Answer File Manager** dialog box appears.
2. Complete any of the tasks described in the following table:



To	Do This
<b>Create a new, empty answer file</b>	Click the  <b>New</b> button. (See <i>Create a New Answer File</i> .)
<b>Add an existing answer file to the library</b>	Click the  <b>Add</b> button. (See <i>Add an Answer File to Answer File Manager</i> .)  To add multiple files one at a time, use <b>Ctrl</b> or <b>Shift</b> to select several files.
<b>Remove a reference to an answer file and optionally delete the actual file from disk</b>	Select the answer file, then click  <b>Remove</b> .
<b>Simultaneously copy an answer file you receive to the <i>Answers</i> folder and add it to the answer library</b>	Click  <b>Import</b> . The <b>Import Answer File Name</b> dialog box appears, where you can browse to the answer file and select it. When you click <b>OK</b> , the file is copied to the <i>Answers</i> folder and added to the library.
<b>Sort answer files in alphanumeric order, based on answer file titles</b>	Select a folder, then click the  <b>Sort</b> button. The contents of the folder are reorganized.
<b>Search for a specific answer file</b>	Select <b>Find</b> , then type the text from the answer file's title or description for which you are searching in the text box. Only files that have matching text in their title or description are shown.
<b>View the answers currently saved in an answer file</b>	Select the answer file, then click the <b>Contents</b> tab.  In the <b>Contents</b> tab, you can sort the columns by clicking the column headings.
<b>View the history of when the selected answer file was used to assemble various templates</b>	Select the answer file, then click the <b>Properties</b> tab.




<p><b>Change the title, path, file name, history, or description of an answer file</b></p>	<p>Select the answer file, then click the  <b>Properties</b> button and make the necessary changes.</p> <p><b>Caution:</b> Changing the file path does not change the location of the actual answer file. If you change the file path without using Windows Explorer to move the actual file to the new location, that answer file will not be accessible.</p>
<p><b>Add a folder so that you can better organize groups of answer files</b></p>	<p>Click the  <b>Add</b> button, then select <b>Folder</b> at the <b>Type</b> drop-down box. (See <i>Add, Modify, and Delete Folders in Answer File Manager.</i>)</p>
<p><b>Modify a folder's title or description</b></p>	<p>Select the folder, then click  <b>Properties</b>. (See <i>Add, Modify, and Delete Folders in Answer File Manager.</i>)</p>
<p><b>Delete a folder</b></p>	<p>Select the folder, then click  <b>Remove</b>. HotDocs asks what you want to do with any answer files within the folder. (See <i>Add, Modify, and Delete Folders in Answer File Manager.</i>)</p>
<p><b>Move an answer file into a folder</b></p>	<p>Double-click the folder to open it, then select the answer file and drag it to the folder.</p>
<p><b>Use Windows Explorer to access answer files instead of Answer File Manager</b></p>	<p>Change the setting at the HotDocs Options dialog box.</p>

## Add, Modify, and Delete Folders in Answer File Manager

To help organize your answer files, you can place them in folders and subfolders within Answer File Manager.

### To add a new folder

1. At the HotDocs library window, click the  **Answer File Manager** button. The **Answer File Manager** appears.
2. Click the  **Add** button. The **Add Item** dialog box appears.
3. In the **Type** drop-down list, select **Folder**. The dialog box changes to show the options needed for new folders.
4. In the **Title** field, enter a folder name.
5. Optionally, in the **Description** field, enter notes to explain why the folder was created, or what kinds of answer files it contains. (This description appears at the **Properties** tab, and can be used when searching for specific answer files.)
6. Click **OK**. The folder is added to the answer library. You can work with the folder using the following commands:

To	Do This
<b>Move an answer file to a specific folder</b>	Double-click the folder to open it, then select an answer file and drag it to the folder.
<b>Modify the title or description</b>	Select the folder and click the  <b>Properties</b> button. The <b>Item Properties</b> dialog box appears, where you can change the title or description.
<b>Sort the contents of a folder in alphanumeric order</b>	Select the folder and click  <b>Sort</b> . The answer files are rearranged based on title.
<b>Remove a folder</b>	Select a folder and click  <b>Remove</b> . If you want to remove the items in the folder as well, select <b>Remove the unselected items contained in the selected folders</b> . Otherwise, any files referenced in the folder will be moved to the next folder level.