



## **INSTALLATION INSTRUCTIONS, LICENSING INFORMATION, & GENERAL ADVICE FOR OHIO DR SOFTWARE, LLC TEMPLATES©**

### **I. Installation of Ohio DR Software Libraries© and Templates©**

#### **A. Installation on a stand alone Computer System**

1. Either Word or WordPerfect must be installed on each workstation before HotDocs is installed. HotDocs is not compatible with Microsoft Works. (In Word, be sure that the Standard Toolbar is visible. In WordPerfect, be sure that the toolbar for your version of WordPerfect is visible.)

2. Install HotDocs Standard or Professional or download the demo version of HotDocs. Either HotDocs Standard or Professional will work with Ohio DR Software templates. Pro is nicer for the creation and editing of templates, but Standard is much less expensive, and will work just fine in running the Ohio DR Software templates. HotDocs must be installed on each workstation. The demo version of HotDocs is downloadable from their website ([www.Hotdocs.com](http://www.Hotdocs.com)). This demo version the full program, but is useable for only 30 days after installation. Use the demo version if checking out the demo version of Ohio DR Software.

3. In Tools/Options on the HotDocs Toolbar, modify HotDocs set up options as deemed appropriate: (I have opinions on each—call for suggestions)

a. Highlight the “Interviews and Dialogs” folder on the left, and then select the desired Date Detection, Date Display Format, and 2 or 4 digit year option.

b. Open the “Interviews and Dialogs” folder and select the desired fonts and colors in the “Appearance” folder.

c. Select the “End of Interview” folder and select the desired options for the end of interview buttons. (The “Go to first unanswered question in interview” and “Send the assembled text document to word processor” options are most important to remain checked. The others are available but not commonly used.)

d. In the Document Assembly option, select the desired Default Date Format and Unanswered Variable Placeholder (see Section III, #11 following).

e. In the Word Processors folder, if Word is your default word processor, select the option to “Launch Word before sending to word processor”.

f. In the File Locations folder, my opinion is to edit the file locations for Library Files, Answer Files, Template Files and Template Sets locations. Create a new folder off your computer’s “C” drive, such as “Domestic” or

OhioDRSoftware (my preference), and then create three folders inside that one: “Templates”, “Libraries” and “Answers”. Then modify the HotDocs File locates for “Libraries”, “Templates” and “Answers” to these. Also modify “Template Sets” to the name of the first folder created.

g. In the File Management folder select in the “Manage answer files using” drop down box, the “Windows Explorer” option.

4. Open HotDocs, select “File,” and then select “Install Templates” from the HotDocs toolbar. Then using the browser on the top of the HotDocs menu panel, locate the Library file to be installed (\*.hdi), either where it was downloaded or if it was e-mailed to you, or on the installation CD. HotDocs will then control the remainder of the installation process. If the libraries were downloaded from the website, select the drop down box to read “All Files” as the downloaded files may have been re-named as “.zip” files rather than “.hdi” files. Contact OhioDRSoftware, LLC for passwords.

Be sure that the appropriate locations are selected from the drop down boxes for the location of the “Library” files (e.g. the “Libraries” folder) and the “Template” files (e.g. the “Templates” folder) when prompted..

Pleadings and forms in HotDocs are grouped in Libraries. Ohio DR Software templates are grouped as follows:

Pleadings such as complaints, motions, entries, agreements, decrees and worksheets, which are appropriate for all domestic relations courts in Ohio, are in the Pleadings Library;

Each county’s county-wide forms are grouped in separate libraries—one for each county, and are divided into appellate districts.

As Ohio DR Software libraries are “published” libraries, the HotDocs’ naming convention names all Library names with the first three letters being “PUB” and places all templates in folders beginning with “PUB”. All the included templates are located in the PUBmaster Library.

#### Installation on a Dedicated Server Windows Network setup

1. Install the word processor and HotDocs as described above in steps 1-3 on each workstation in the network.

2. As per step 3(f) above, edit the Tools/Options/File Locations on each workstation so that the location of the “Library” files, “Answer” files, “Template” files and “Template Sets” are pointed to the appropriate folder location on the server.

3. From any one workstation, install the Ohio DR Software Templates© as per section 1(A)(4).

4. From any one workstation, for each library, select the library, highlight the top item in that library with the mouse, then select “Edit” from the HotDocs toolbar (not the Word or WordPerfect toolbar). Then select “Multiple”. Then using the “Browse” button (the middle button), browse to the server location where the templates for that library are located (i.e. if “g” is the letter drive of the server: “g:\domestic\templates\PUBplead\” for the “PUBplead” library). Repeat for each library installed.

5. It is recommended that the Libraries and Template folders on the server be backed up by the network administrator to a location accessible only to the network administrator. Then, the Library and Template folders on the server, but not the Answer folder, should be made “read only” so the content are not modifiable without administrative consent.

#### C. Installation on a Non-Dedicated Server Windows Network setup

1. Install the word processor and HotDocs as described above in steps 1-3 on each workstation in the network.

2. As per step 3(f) above, edit the Tools/Options/File Locations on each workstation so that the location of the “Library” files, “Answer” files and “Template” files are pointed to the appropriate folder on the server. On the workstation acting as the server, edit the Tools/Options/File Locations there so that the “Answer” files, “Template” files, “Library” files as well as “Template Sets” are located on that local drive as described in 3(f).

3. Install the Ohio DR Software templates© as per section 1(A)(4) from the workstation acting as the server.

4. At each workstation not being used as the server, select Tools/Options/File Locations and in the “Reference Paths” box, add the name of each library installed (e.g. “PUBplead”), then using the “Browse” button, browse to the server location where the templates for that library are located (i.e. “g:\domestic\templates\PUBplead\”). Repeat for each library installed at each workstation of these workstations. It is not necessary to add or edit the “Reference Paths” on the workstation being used as the server.

5. It is recommended that the Libraries and Template folders on the server be backed up by the network administrator to a location accessible only to the network administrator. Then, the Library and Template folders on the server, but not the Answer folder, should be made “read only” so the content are not modifiable without administrative consent.

#### D. Setup in a Law Library

1. Follow A, B and C, except that in setting up the file locations, for the answer files, select the Flash Drive location.

## II. Starting the HotDocs Assembly Process

There are two ways to open HotDocs. First, if you already have Word or WordPerfect open, select the large red “D” on the Toolbar. The “D” was installed when HotDocs was installed. This opens the HotDocs program. The second alternative is to select HotDocs from either the Desktop or from Program Files. Since it will be used frequently, it is recommended to put HotDocs on the desktop if it is not already there.

If the “Master” library has been installed which includes all Ohio DR Software templates© in one large library, there is no need to change libraries. To select the templates needed, use your mouse to open the appropriate folder to locate the template desired.

## III. General Information

1. Before attempting to use Ohio DR Software LLC Templates© on an actual case, read these instructions and either the HotDocs Installation Guide & Tutorial regarding assembling documents and/or the HotDocs Help Guide (“Assemble Documents”), and utilize the tutorials provided. After becoming familiar with the assembly process, including the selection of multiple documents at the same time (using the CTRL for multiple selections not in consecutive order & Shift keys for multiple selections in consecutive order), select various Ohio DR Software templates and practice assembling them. In this way you will become familiar with their content and their dialog structure, and the assembly process prior to being in a time crunch with a client in your office waiting for documents to review and sign.

2. An “Installation Guide and Tutorial is provided with the purchased version of HotDocs. The only manual for HotDocs is located in the Help directory. However you can also download a PDF version of the entire HotDocs Help manual from:  
[www.hotdocs.com/support/downloads/documentation](http://www.hotdocs.com/support/downloads/documentation).

Also, at the end of this document is the basic HotDocs Assembly information.

3. Attorney information for each attorney using the software must be entered into an Answer file before assembly is begun. Attorney information is created and saved by selecting the Firm Interview document at the beginning of the Pleadings Library. After attorney information is answered, (one dialogue page per attorney) save (or re-save) those answers in a file named “firm”. The answer file type must be in the “.ans” format, so select that option in the drop down box at the bottom of the save screen. Thereafter, the appropriate attorney(s) can be selected as signatories and on forms and pleadings. The “firm” answer file can be modified as with any answer file when attorney information changes.

4. The Client Information/Interview forms located at the beginning of each library are useful to gather information from clients. They ask for all the relevant information to complete all the forms and pleadings for any one county. They can be printed out for use by attorney, staff

personnel, or for the clients to answer themselves. In the alternative, they can be completed on line by the attorney or paralegal with the client present.

The Pleadings Library and each county library contain Client Information/Interview forms. Those located in a county library contain the information needed to complete that county's forms, as well as general information for most pleadings. The interview forms in the Pleadings library are generic for most counties, but not specific. In the Pleadings library and in most county libraries, there are several interview forms to choose from—the first combines all the questions from the others.

In addition these interview forms to gather information, a questionnaire for each template can be created (called a Question Summary). To create a Question Summary for either the Client Information Interview forms or a specific template, select and begin to assemble it. However, rather than completing the dialogue questions, select View, and select the Question Summary Tab. Then select the Question Summary Tab. The tab could be on the top or bottom of the screen (depends on your set up.). This brings the Question Summary to the screen. Then just send it to the printer or to your work processor by selecting that function under the File button.

Answer Summaries (for each document) can be similarly printed. In addition, using Windows Explorer (not HotDocs), Answer files (\*.ans") for each client can be opened and printed. Answer files can also be reviewed and edited in HotDocs using the Answer File Manager.

5. Except for the demo version, all Ohio DR Software, LLC Templates© and libraries provided are modifiable (unless in the "Law Library" version or if your network administrator has made them "read only"). However, any template that has been assembled to the word processor can be edited, even in the Demo version.

For those systems that allow template modification, those templates can be modified (edited) to suit individual tastes in both content or format. However, as per the licensing information provided, Ohio DR Software, LLC Templates© are not for re-use, resale, or to be copied to other computers or networks, unless appropriate site licenses are purchased from Ohio DR Software, LLC. Further, modification of the original templates provided voids any warranty as to that template.

Editing of the template can be accomplished in HotDocs by selecting the Edit button, rather than the Assemble button. If edited in this way, all edits will become permanent. Edits on assembled documents only affect that assembled document.

Until you become proficient with HotDocs coding, do not attempt to modify any HotDocs variables, dialogs, or repeats, or insert new ones. If you prefer, contact Ohio DR Software, LLC for a quote to modify or create templates for your office.

It is not necessary to understand how to create or edit templates in order to assemble the Ohio DR Software, LLC Demo Templates© that have been provided.

All templates use HotDocs 6.2 format. Therefore, they can be assembled and/edited by HD 6.2, HD2005, HD 2006, HD 2007 and HD 2008. They are not appropriate, however, for the HotDocs Server or the HotDocs Player versions.

6. The Tax Library is entirely in a format that requires HotDocs PDF Advantage, which can be purchased at additional cost. Read the HotDocs Help information about HPT Automator templates before attempting to assemble one. Assembly is fairly similar to text templates, but there are some differences. In addition, text cannot be modified in Automator documents; only the answers which are located in fields can be edited. The text is static, such as in a PDF document. The form therefore cannot be expanded or contracted despite the length of the information inserted. If an answer exceeds the space available, you have a choice of reducing the font size, truncating the answer, or sending it to an appendix.

7. After a document is assembled, it can be printed and saved as any word processing document. It is not recommended to save assembled documents in the same folder where the Ohio DR Software templates© or HotDocs are located.

8. After each individual or group of templates are assembled for an individual client, save that client's information in an Answer File for that client. You can then select that Answer file for later forms or pleadings needed for that client. This is one of the most important benefits of HotDocs templates, as it avoids the necessity of re-entering previously answered information. Also, in case of computer lockup or crashing, especially when assembling multiple or complex documents, client information can be saved in an answer file at any time during the interview process by selecting the Save Answer button on the HotDocs toolbar (looks like a document with a Red "A" in the center).

9. To be familiar with the content and options available in each Ohio DR Software, LLC Template©, prior to assembling the first template for a client, it is recommended that all templates be printed and organized in a notebook. It is also recommended that the Client Interview and Question Summary forms for each template be printed and made available to clients, attorneys, or staff when interviewing clients.

10. Ohio DR Software, LLC Pleadings Templates© are arranged in usage order where possible. In most county libraries, the templates are listed either in alphabetical or form number order.

In HotDocs, all templates can be copied and pasted to other libraries or moved to other locations in the same library (or deleted), unless made "read only" by the network administrator. In addition, the libraries themselves can be edited to re-arrange the templates or rename them.

To speed up the assembly process, un-depress the "Instant Update" lightning symbol to the left of the Answer file name on the HotDocs toolbar. This stops updating the answer file with every TAB press.

11. In the Tools/Options selections, HotDocs provides several alternatives when variables are not answered. (It is common that some variables in the Ohio DR Software, LLC Templates© will intentionally not be answered since the information will not be known or relevant.) One alternative is for HotDocs to mark each unanswered variable in the assembled document. There are several alternatives available on how each unanswered variable is marked, such as underlines, asterisks, variable names, etc. The other alternative is not to have such places marked (the “Nothing” choice in the drop down menu). As a safety measure to make sure all necessary variables have been answered, it is a good idea to allow HotDocs to mark those unanswered variable locations. However, for completion speed, the “Nothing” choice is (much) quicker, as there will be no need to edit out the marks in the assembled document which were not answered intentionally. However, this alternative is only recommended for experienced users.

12. Ohio DR Software Templates© are only for use by licensed Ohio lawyers, or their employees acting under their supervision.

#### IV. Specific Template Information

1. All Ohio DR Software Templates© have been created with the use of dialogs (groups of related questions at a time). Also, many variables in a dialog will change or disappear, depending on the answers to earlier variables. Variables can be either: Text, True/False, Multiple Choice, or Numerical, and must be answered accordingly. Some text questions allow for unlimited number of responses, such as listing the children of the marriage. This is called a “Repeating” variable. When Repeats are used, responses will expand the assembled text document so that all information is used, no matter how long. In HFT or HFP Automator documents, excess information is sent to an appendix. Mathematical computations are also included in the templates. These are computed automatically without user input after the numbers are inserted as the answers are sent to the word processor at the end of the Assembly process. Editing a number after the template has been assembled, will not re-calculate any totals. To re-calculate, it is best to re-assemble the template after changing the incorrect number in response to the dialog question incorrectly answered.

2. Most templates have been created using 1” margins right-left and top-bottom, if possible. Most templates have been created using a Times-Roman 12 font where possible. Several counties require different top margins on the first page of pleadings. That option is available for each pleading provided. In addition, several counties require the name of the attorney of record in the caption. That alternative is also provided for each pleading. Also, various alternatives are provided for the name of the court in the caption, and whether addresses, social security numbers, telephone numbers, etc are to be placed in a pleading caption. These choices can be modified for each pleading, depending on the pleading to be assembled. For example, addresses would normally be selected for a complaint, but not selected in an Answer or other pre-decree motion.

3. Many Ohio DR Software templates make use of tables and HotDocs Repeats. Repeats are set up as Spreadsheets where possible. Filling in each column and row with all the necessary information completes these Repeats. If a Repeat or other dialogue does not fit on the screen

completely, use the right-left or up-down arrows to view all the variables so they can be answered.

When a Repeat has too many variables to fit on a Spreadsheet dialog page, it is formatted as a Repeated Series rather than as a Spreadsheet. A Repeated Series Repeat look different than Spreadsheet Repeats, but work the same way in that the resulting table will expand to fit in as much information that has been inserted. The difference is that, if the responses in a Repeated Series are more than one, the user must go to the next page of the Repeated Series by hitting the “Next” button at the bottom of the page, rather than selecting the Dialog list on the left side of the page. The user should complete as many pages as necessary (e.g. 3 pages if there are 3 children in the “Children Information” repeat). When the last page of the Repeat is unanswered (i.e. no more children), the next new dialog will then appear when the “Next” button is selected.

4. Pleadings provided can be used in both pre and post decree matters. Addresses, social security numbers, birthdates, telephone numbers and driver’s license numbers can be selected for the captions depending on attorney preference or local rules of the court.

5. The provided Interest Calculator will calculate the interest that has accrued on arrearages in child or spousal support. The provided Support Calculator will calculate the total amount of arrearages in child or spousal support.

6. The provided Child Support Worksheets will do the math necessary to correctly compute the child support obligation. In the assembly of this template, the user has several options:

a. The user can select the support obligation from the child support table (lowest, highest, and proportional) pursuant to statute.

b. If the adjusted income of the parents exceeds \$150,000, the template will provide alternatives to select the method of calculating support.

c. The user also has the option to allow the appropriate child care tax credits to be computed by the software automatically.

d. The user has the option whether to use the Cash Medical Support Obligation for the custodial parent or not.

e. The user has the option to print on an additional page a list of all the above option choices selected.

f. The user has the option to include additional computations on a separate page:

(i) Support per child per month

(ii) Net income per parent after payment of support and cash medical support

7. All Ohio DR Software Templates©, including the decrees, separation agreements and shared parenting plan templates, have been created to comply with all Ohio statutes and local rules. If errors are found, or if local rules change, please notify Ohio DRSoftware, LLC so that corrections can be made.

8. The Complaints, Answers, and Decrees allow the option for minor children born to the parties prior to the marriage to be added as additional plaintiffs and for a paternity cause of action. These templates also allow for the addition of third party defendants.



9. The Pleadings Library has been organized chronologically, i.e. how a case progresses. Each folder is labeled and should be opened to locate the templates located therein. As there are over 470 templates in that library, it is recommended to print out the itemization of the library from the “Itemization” page at the [www.OhioDRSoftware.com](http://www.OhioDRSoftware.com) website and provide that list to all users. In addition, to find a template quickly, enter the desired template name in the “Find” box at the bottom of the HotDocs Library page. All templates with that name will appear for selection for assembly. After assembly, erase the document name from the “Find” box and remove the check mark to the left. In this way, the full library will reappear.

10. Many motions in the Pleadings library contain options as to content. For example, the Motion for Contempt template contains over 50 such options (as many as needed can be selected) and this motion can be used either pre or post decree. All such options are located in the itemized list of templates on the OhioDRSoftware website, and such option can also be found when a motion is highlighted in the Pleadings Library, on the “Folder Properties” on the right side of the Pleadings Library page.

11. Users can create and add templates to the libraries provided, or create additional libraries of templates. For example, standard correspondence templates could be added. This requires knowledge of HotDocs creation functions. There is a learning curve to do this, but it can be done.

## V. Legal Stuff/License Agreement

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**Network Licenses/Installations:** Concurrent multi-user licenses for network or other multiple user installations are available for an additional charge. Please contact Steven E. Simon at 1-513-518-0756 or email [SSimon@OhioDRSoftware.com](mailto:SSimon@OhioDRSoftware.com).

**Other Information:** Ohio DR Software Templates© are only being marketed to licensed Ohio attorneys, courts, law firms, law schools and County Law Libraries for use by licensed Ohio lawyers and their employees working under attorney supervision.

Ohio DR Software, LLC is not providing any legal advice to anyone in the creation or distribution of the templates provided. The templates provided should only be selected after an attorney reviews each client's particular factual circumstances, and each assembled document should be reviewed by a licensed Ohio attorney before being submitted to a client for review and signature or filed in any court.

Ohio DR Software LLC will provide free template updates for one year after purchase and delivery. If purchasers become aware of updates or form changes (or form errors), please provide that information to Ohio DR Software, LLC so that updates or corrections can be provided promptly to everyone.

All purchasers should provide Ohio DR Software, LLC with their e-mail address so that updates (and bug fixes) can be delivered promptly. Ohio DR Software, LLC will remedy any

inherent errors in the templates provided, but is not responsible for any software problems caused by HotDocs, Word, or any other software programs. Ohio DR Software, LLC is not responsible for errors in templates that have been edited or modified by purchasers. Ohio DR Software, LLC is not responsible for network installation errors. Technical Support for errors on templates created by or modified by Ohio DR Software LLC purchasers, for network installation issues, or for help to create new templates, can be arranged by contacting Ohio DR Software, LLC.

Valuable HotDocs information and free advice is available at the following web sites:

1. [www.hotdocs.com](http://www.hotdocs.com);
2. [www.docauto.com/BOHDL/bohdlxx.htm](http://www.docauto.com/BOHDL/bohdlxx.htm);
3. [www.hotdocs.com/support/technote.htm](http://www.hotdocs.com/support/technote.htm);
4. [www.legals.com/hotdocs/](http://www.legals.com/hotdocs/); and
5. [www.hotdocs.com/pipemail/hotdocs-l/](http://www.hotdocs.com/pipemail/hotdocs-l/).

There is also a HotDocs list serve which provides valuable technical help and can be joined at [www.hotdocs.com](http://www.hotdocs.com).

## VI. HotDocs Assembly Instructions

The following Instructions were copied from the Help File of HotDocs® and were provided by the software developer. These instructions are only a basic overview of the Assembly process, and are only a small part of the total instructions provided with the software. It is recommended that all users review all the instructions provided with the software.

# Overview: Assemble a Text or Form Document

There are two types of documents you can assemble—*text* documents and *form* documents. Text documents are documents you view in your word processor, and all the text in the document can be edited as much as necessary. Form documents are those in which the underlying text is *static*, meaning it cannot be modified. Only the answers that are merged into the document can be modified. (An IRS form is a good example of a form document.) The process of assembling both of these types of documents is very similar. However, there are specific things you should know about assembling form documents. Please see [Overview: Assemble a Form Document](#) for a description of these differences.

When you assemble a document, HotDocs displays the assembly window and uses a series of dialogs to gather the information needed in the document. Each of these information-gathering dialogs can contain one or several variables (depending on how the template developer has structured the information).

Each dialog is represented as an icon in the *interview outline*—the left pane of the HotDocs assembly window. You can click on any dialog in this outline and the variable questions appear in the *dialog pane* to the right, where you can provide the required answers. To navigate between dialogs, you can use the HotDocs button set or keyboard shortcuts.

In addition, you can select other tabs on the assembly window to view different aspects of the document contents. For example, you can preview the information that will appear on the document, or see a summary of the questions or answers in the document. You can also view a spreadsheet of the template's variables and any answers that have been given.

Once all the answers are provided, you can send a copy of the document to a word processor or to HotDocs Filler for post-assembly editing. If no further editing is needed, you can print the document or save it to disk. You also can save the answers you've provided in an answer file, which can be used to assemble other documents.

## Assemble a Text or Form Document

You assemble a document by selecting a template and then providing the required variable information.

If you are assembling a form document, there are some additional tasks you may need to know about. For details, see [Overview: Assemble a Form Document](#).

## To assemble a document

1. At the HotDocs library window, select a template.
2. Click **Assemble**. The **Answer File** dialog box appears. ([Tip](#) )
3. Select an answer file, and then click **OK**. (See [Select an Answer File for Assembly](#).) The assembly window appears, showing the interview outline and the first information-gathering dialog.
4. Answer the dialog questions, and then click **Next** to advance to each new dialog. (See [Navigate Through Answer-Gathering Dialogs](#).) ([Tip](#) )
5. After the final dialog, the **End of Interview** dialog identifies how many questions haven't been answered. This dialog also provides options for working with the assembled document. (See [Use the End of Interview Dialog](#) for specific details.)

To print a copy of the assembled document, click the **Document Preview** tab (or the **Form Document** tab for forms), then click the **Print Document** button. ([Tip](#) )

HotDocs updates the interview as you enter answers in a dialog. If you experience a significant delay when moving from one answer to the next, you can specify an option that causes HotDocs to update the interview less frequently. (See [Update Your Interview Outline](#).)

# Overview: Move Through the Interview Process

After you select a template at the HotDocs library and click **Assemble**, the HotDocs assembly window appears, where you provide the answers needed to assemble documents.

At the top of the assembly window, menu commands and buttons control the interview. The left pane of the window shows the interview outline, displaying an icon for each information-gathering dialog that must be answered. The right pane shows the questions in each dialog, as well as the navigation bar. Below this pane, the Resource pane appears, and may contain text to help explain complex questions. At the bottom of the assembly window, a row of tabs allow you to preview information in the document, or view summaries of the questions and answers.

## [Example](#)

As you assemble a document, you must provide answers in the information-gathering dialogs. Often this is simply a matter of typing data in the answer fields, although some advanced features (such as external answer sources, inserted dialogs, or repeated dialogs) require extra attention. After supplying answers at each dialog, you can print the document, save it as a word processor file, or attach the word processor file to an e-mail message.

During the interview, you can preview information on the document, and review summaries of questions and answers. A question summary compiles a list of the variables in the template,


which can be printed and used as a form for gathering information. An answer summary also lists the variables, and shows the current answers as well, providing an outline of the document's contents. You can also view a variable summary that shows a spreadsheet, listing the variable names, types, prompts, and answers.

Once you've completed the interview, you can save your work or print the assembled document. After saving or printing one version of the document (or even in the middle of the interview), you can switch answer files and assemble another document.

Some templates gather personal information about you, such as the name of your organization, your title, or your contact information (for instance, your phone number or e-mail address). HotDocs only needs to gather this information once, then these questions will be answered automatically. If you want to change your personal information, use the **HotDocs Options** dialog box. (See [Enter or Edit Your Personal Information](#).)

HotDocs updates the interview as you provide answers in a dialog. If you experience a significant delay when moving from one answer to the next, you can specify an option that causes HotDocs to update the interview less frequently. (See [Update Your Interview Outline](#).)

## Assemble an Interview Template

An interview template is distinguished from other templates in the library by its icon: . An interview template does not produce an assembled document. Instead, it gathers and saves information (such as court, attorney, or client information) that can be used in assembling other documents.

For example, a template library might include an interview template named *Client Information*. This template could gather personal information about each client—such as name, address, gender, birth date, and so forth. This information may be needed in other templates in the library. Before you ever assemble any of these other documents, you could assemble the interview template and create a set of answers. Then, when you assemble other documents that ask for client information, the answers are already available.

Unlike text and form templates, you cannot save an assembled document from an interview template—you can only generate an answer file. In some situations, though, the answers you enter may automatically be saved in an answer source. These answer sources can be used to answer questions when assembling other documents. (See [Select Answers from a Separate Answer Source](#).)

### To assemble an interview template

1. At the HotDocs library window, select the interview template and click **Assemble**. The **Answer File** dialog box appears.
2. If the template is already associated with an external answer source, you will *not* be prompted to select an answer file. Instead, skip to step 3.
3. Select an answer file, then click **OK**. (See [Select an Answer File for Assembly](#).)

4. HotDocs displays the assembly window, showing the information-gathering dialogs. Answer the dialog questions.
5. At the end of the assembly, HotDocs may prompt you to save your answers in an answer file.
6. If this prompt appears, click **Yes** to view the **Save Answer File** dialog box, where you can save the answers you've provided. Or click **No** to discard the answers.
7. If this prompt doesn't appear, the template is probably associated with an external answer source, so HotDocs automatically saves the answers to that answer source.
8. Close the assembly window.

## Select an Answer File for Assembly

When you assemble a document, you must choose whether to use a new answer file or an existing file. After each assembly, HotDocs can save your answers for use with other assemblies.

### To select an answer file

1. At the HotDocs library window, select a template, then click **Assemble**. The **Answer File** dialog box appears.
2. Accept the suggested answer file by clicking **OK**, or change the answer file by choosing one of the following options:
3. Click the **Select Answer File** button to open the Select Answer File dialog box where you can choose an existing answer file. After making your selection, click **Select**.
4. Click the **New Answer File** button to create an empty, untitled answer file.
5. At the **Answer File** dialog box, click **OK**. The assembly window appears.

## Assemble Multiple Documents

You can select multiple templates or clause libraries, and then start one assembly process that will address each template. Each template or clause library will create a separate document, using the same answer file, unless you select a different answer file during assembly. (See [Switch Answer Files During Assembly](#).)

The assembly queue and assembly queue status box (located in both the library and the assembly window status bars) can help you track the assembly of each document. See [Use the Assembly Queue](#) for details.

### To assemble multiple documents



1. At the HotDocs library window, press **Ctrl** or **Shift**, then select all the templates and clause libraries you want to assemble.
2. Click **Assemble**. The assembly queue status box displays how many assemblies are waiting, and the **Answer File** dialog box appears.
3. Select an answer file and click **OK**. (See [Select an Answer File for Assembly](#).) The assembly window appears.
4. If the item is a template, the first answer-gathering dialog is shown. (See [Assemble a Text or Form Document](#).)
5. If the item is a clause library, the clause library is shown. (See [Select Clauses from a Clause Library During Assembly](#).)
6. Provide answers or select clauses for the interview.
7. After completing the interview, the **End of Interview** dialog notifies you that other assemblies are ready to begin.
8. Close the assembly window, and begin assembling the next document.

## Use the Assembly Queue

The assembly queue shows a list of templates, some that may be waiting to be assembled, and some that may have recently been assembled. Using the assembly queue, you can start and stop assemblies, change the assembly order, and change how assemblies are started. In addition, the assembly queue status box (which is located in the status bar of the template library window and assembly window) also shows when templates are queued for assembly.

The assembly queue provides two methods for starting assemblies: *auto* mode and *manual* mode. These methods are controlled by the **Auto-Start** button in the assembly queue toolbar. When assembling multiple templates and **Auto-Start** is selected, HotDocs automatically starts each assembly, following the order in which the templates are shown in the queue. When assembling multiple templates and **Auto-Start** is *not* selected, HotDocs starts the first assembly, but then waits for you to start each subsequent assembly by clicking the **Assemble** button on the assembly queue toolbar.

When subsequent assemblies start, HotDocs automatically uses the answer file currently in use. However, you can change the answer file during the interview. See [Switch Answer Files During Assembly](#) for instructions.

The assembly queue can track interviews for templates from multiple libraries. Also, when a template contains an instruction to assemble another document, the assembly queue automatically adds an entry for that second template.

As templates are added to the assembly queue, they are assigned a status, which is updated throughout the assembly process, helping you identify each document's stage in the assembly process. For a description of template statuses, click [here](#) .

Template Status	Description
Confirmed	The assembly queue has located the template file and is prepared to assemble it.
Assembling	HotDocs is currently assembling this document.
Pending	This template is in the queue because of Instruction models in the template currently being assembled. After the current interview is finished, the Pending status changes to Confirmed.
Complete	Assembly is finished.  Complete status doesn't necessarily mean that all the variables in a template have been answered. In some cases (such as printing a question summary to use as a questionnaire), none of the variables are answered, but the use of the template ends. Because of possibilities like this, the assembly queue simply assigns the Complete status when the assembly window closes.
Error	An error occurred during assembly, preventing the interview from being completed.

### To work with assemblies in the assembly queue

1. At the HotDocs library window, click the **Assembly Queue** button. The **Assembly Queue** dialog box appears. ([Tip](#) )
2. At the library window, select multiple templates and click **Assemble**. Entries for each template appear in the assembly queue. Then the **Answer File** dialog box appears. (See [Assemble Multiple Documents](#).)
3. At the **Answer File** dialog box, select an answer file and click **OK**. (See [Select an Answer File for Assembly](#).) The first dialog appears in the assembly window.
4. Throughout the interview process, perform any of the following tasks using the assembly queue:

To	Do This
Change the assembly order	Select an entry and click the <b>Up</b> or <b>Down</b> button. Templates that are currently assembling cannot be moved in the queue. ( <a href="#">Tip</a> )
Remove a confirmed assembly	Select the assembly and click <b>Delete</b> . Templates that are currently assembling cannot be removed from the queue. ( <a href="#">Tip</a> )

Change whether assemblies start automatically or manually	Click <b>Auto-Start</b> . ( <a href="#">Tip</a> )
Manually start an assembly	Select an entry in the assembly queue and click <b>Assemble</b> . This feature is only available when <b>Auto-Start</b> is turned off. Also, if one template is already assembling, you cannot start another assembly. ( <a href="#">Tip</a> )
Remove the entries for all completed assemblies	Click <b>Clean Up</b> . ( <a href="#">Tip</a> )

When HotDocs closes, it remembers the assembly queue display setting. If you close HotDocs while the queue is showing, the queue will automatically be displayed the next time you open HotDocs.

## Navigate Through Answer-Gathering Dialogs

The HotDocs assembly window provides an interface that makes it easy to move through answer-gathering dialogs. The interview outline gives you an overview of the template, while the dialog pane displays the variables you must answer. At the bottom of the dialog pane, the navigation bar provides buttons to move you through the interview. ([Tip](#) )

As you answer variables, the interview outline icons change color. This can help you identify how much of the interview is left to complete:

None of the variables have answers.

At least one of the variables has an answer.

All the variables have answers.

Repeating dialog that gathers a list of answers.

New, empty repeating dialog where you can add another set of answers to a list.

The final dialog in every template is the *End of Interview* dialog. This dialog provides information about the number of unanswered questions, as well as options for working with the assembled document. (See [Use the End of Interview Dialog](#).)

### To navigate through HotDocs dialogs

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. The HotDocs assembly window appears. Complete any of the tasks listed in the following table:

To	Do This
Move to another dialog in any order	Click a dialog icon in the interview outline.
Go to the next dialog	Click the <b>Next</b> button. ( <a href="#">Tip</a> )
Go to the next dialog that contains an unanswered variable	Click the <b>Next Unanswered</b> button. ( <a href="#">Tip</a> )
Go to the previous dialog	Click the <b>Previous</b> button. ( <a href="#">Tip</a> )
Go to the previous dialog that contains an unanswered variable	Click the <b>Previous Unanswered</b> button. ( <a href="#">Tip</a> )
Go to the <i>End of Interview</i> dialog	Click the <b>Go to End of Interview</b> button.
Go to the first dialog in the interview	Click the <b>Go to First Dialog</b> button.
View additional information about a specific answer or the contents of a dialog	Click the <b>Resources</b> button. (See <a href="#">Access Resources During Assembly.</a> )
Hide the outline of dialogs	Click <b>Interview Outline</b> ( <b>View</b> menu).
Preview information in the document	Click the <b>Document Preview</b> tab. ( <a href="#">Tip</a> )
View a list of the variables used in the template	Click the <b>Question Summary</b> tab. (See <a href="#">View a Question Summary.</a> )
View a list of the variables and their current answers	Click the <b>Answer Summary</b> tab. (See <a href="#">View an Answer Summary.</a> )
View a spreadsheet of the variables and their current answers	Click <b>Variable Sheet</b> ( <b>View</b> menu). (See <a href="#">View the Variable Sheet.</a> )
Cancel or close the assembly process	Click the <b>X</b> in the upper-right corner of the window, or press <b>Ctrl+W</b> .

## Use Repeated Dialogs During Assembly

Dialogs can repeat to gather several sets of answers for the same variables. A repeated dialog can appear as a series of dialogs or as a spreadsheet.

### To enter answers in a series of dialogs

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document.](#))

2. Navigate to a repeated answer-gathering dialog, and enter answers for the variables.
3. Click **Next** to continue to the next repetition. The repetition number next to the dialog icon increases each time you provide answers for the dialog.
4. To move to the next dialog, leave all the answer fields empty and click **Next**. ( [Tip](#) )

### To enter answers in a spreadsheet

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. Navigate to an answer-gathering dialog that includes a repeated dialog formatted as a spreadsheet.
3. Click in the first spreadsheet cell and enter your answer.
4. Press **Tab** to move to the next cell in the row (or use the mouse to click in the next cell) and enter your answer.
5. Repeat this process for each answer.
6. Optionally, click **Edit Row** to display the current row in the pop-up interview. This displays the variables for easier viewing. (See [View an Answer Spreadsheet in Dialog Format](#).)

## Answer Date Questions

To make it easier to answer Date variables, HotDocs provides three different ways to enter a date.

- Type the letter **t**, then move to the next answer field. HotDocs converts the letter to the current date.
- Type a date using a common format, such as MM/DD/YYYY. HotDocs converts the format to match the format specified for the template. ( [Tip](#) )
- Click the **Calendar** button to access the **Calendar** dialog box. Then use the **Next** or **Previous** arrows to locate the desired month and year. Select a day, and click **OK**. ( [Tip](#) )

HotDocs may format dates in the assembly window different from the way they will appear in the document. A setting in the HotDocs Options dialog box controls the appearance in the assembly window. (See [Change the Way Dates Appear in Answer Fields](#).) When a date appears in the document, however, it is formatted according to the format assigned to that variable.

## Use the End of Interview Dialog

The *End of Interview* dialog appears after every assembly. 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. Because different documents are used for different purposes, the options available at the *End of Interview* dialog may vary according to the type of document being assembled.

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

### To work with assembled documents at the End of Interview dialog

1. At the HotDocs library window, select a template and begin assembling the document. (See [Assemble a Text or Form Document](#).)
2. After completing the interview, the *End of Interview* dialog appears, where you can perform any of the following tasks:

To	Do This
Return to the first unanswered question in the interview	Click the <b>First Unanswered</b> button.
Save a copy of the assembled document	Click the <b>Save Document</b> button.
Save an assembled text or form document as a PDF file  To save assembled documents as PDF files, you must have HotDocs PDF Advantage installed. For details on obtaining a license, contact your <a href="#">HotDocs sales representative</a> .	Click the <b>Save PDF</b> button.  For complete instructions on saving assembled documents as PDF files, see <a href="#">Save a Document as a PDF File</a> .
Edit the text document in your word processor or edit the form document in HotDocs Filler	Click the <b>Send Document</b> button. ( <a href="#">Tip</a> )
Copy the document text to the Clipboard (only available when assembling clauses)	Click the <b>Copy</b> button.
Close the assembly window without saving a copy of the assembled document	Click the <b>Close</b> button.

When you assemble multiple documents, the *End of Interview* dialog also notifies you that other assemblies are ready to begin.

## Save an Assembled Text or Form Document

Some projects may require you to save an electronic copy of every document. Also, you may need to move the document to a disk or laptop, so you can take an editable, printable version of the document to another location.

### **To save an assembled text or form document**

1. At the HotDocs library window, select a template and begin assembly. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click the **Save Document** button in the toolbar or on the *End of Interview* dialog. ([Tip](#) )
3. If there are any unanswered questions, a dialog box appears. Click **OK**. The **Save As** dialog box appears. ([Tip](#) )
4. Navigate to the folder where you want the document to be saved.
5. In the **File name** box, type in a name for the document, then click **Save**.

When you save a text or form document, the file is separated from the answer file, so any changes you make to a saved document are *not* saved to the answer file. Likewise, if you make changes in the assembly window, those changes are not automatically reflected in the saved file.

## **Edit an Assembled Text or Form Document**

After you complete an interview, you may need to do some post-assembly editing. However, you cannot edit the document text while in HotDocs. You must first send it to an application that can edit the kind of file you are assembling. Text documents are sent to a word processor, and form documents are sent to HotDocs Filler. (See [Work with a Saved Form Document in Filler](#).)

Changes you make in other applications are *not* reflected in the HotDocs assembly window.

### **To view an assembled document in an editing application**

1. At the HotDocs library window, select a template and begin assembly. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click the **Send a copy of the assembled document** button. ([Tip](#) )
3. If there are any unanswered questions, a dialog box appears. Click **OK**. The editing application appears, showing the assembled document. ([Tip](#) )
4. Using the editing application's tools, modify the document.

Before sending the document to an editing application, use the **Document Preview** tab to verify the information is correct. After you send the document to the editing application, the document is no longer connected to the template file, component file, or answer file. If the assembly window is still open, you can return and edit the answers for the document. However,

changes made in the assembly window are *not* reflected in the editing application. To save those changes to the editing application, you must click the **Send Document** button again.

The **Document Preview** tab might not accurately display formatting features, particularly in WordPerfect template files. These discrepancies are *not* saved to the document; they are merely part of the preview.

## Print an Assembled Text or Form Document

Many projects require you to print copies of assembled documents. (You can also print documents as PDF files. You must have PDF Advantage installed to do this. Contact your [HotDocs sales representative](#) for information.)

### To print an assembled text or form document

1. At the HotDocs library window, select a template and begin assembly. (See [Assemble a Text or Form Document](#).)
2. After providing the required answers, click the **Document Preview** tab (or for form documents, the **Form Document** tab). The assembly window changes to show a preview of the document. ([Tip](#) )
3. Click the **Print Document** button. ([Tip](#) )
4. For documents assembled from PDF-based templates (.HPT), the **Print Document** dialog box appears, where you can choose to have Adobe Acrobat handle the printing. ([Tip](#) )
4. If there are any unanswered questions, a dialog box appears. Click **OK**. ([Tip](#) )
5. If you're printing a form document, HotDocs Filler allows you to specify other options:

To	Do This
Print the form and answers	Select <b>Form with Answers</b> .
Print only the static text of the form template	Select <b>Form Only (Blank Form)</b> .
Print the answers onto a pre-printed copy of the form	Select <b>Answers Only (Use Preprinted Form)</b> .
Change the double-sided printing settings	Select the desired option in the <b>Print this form</b> option group.