



HOTDOCS

for LEGAL PROFESSIONALS

Covering HotDocs
Version 11



HOTDOCS

FOR LEGAL PROFESSIONALS

SITE LICENSE

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The materials in this book were written using HotDocs 11 and all steps and instructions were tested prior to the publication date. As HotDocs continues to be updated, your software experience may vary slightly from what is seen in this manual.

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MEET OUR TEAM OF HOTDOCS EXPERTS

Meet our team of HotDocs experts who have co-authored this manual.



BARRON HENLEY

Barron is an attorney who has over 20 years of experience in legal technology. After earning his B.S./B.A. (marketing and economics) and J.D. from The Ohio State University, Barron discovered his passion for helping lawyers fix problems within their practice. Today, Barron partners with our clients to make law firms and legal departments more efficient. Barron's breadth of knowledge enables him to dive into the details of a firm's operations. He is often the lead on Comprehensive Practice Analysis projects for clients that examine all aspects of making a firm more successful: technology, organizational design, process optimization and financial practices.

JOHN FEDERICO

John's specialty is "making technology do cool things it wasn't necessarily intended to do." Having practiced as an attorney, John understands the rigors of practicing law, but he also empathizes with the demands placed on a legal professional's time. With this in mind, he saves time for his clients by leveraging document automation technologies like HotDocs and Microsoft Word, to drastically accelerate the drafting, reviewing, and editing of legal documents.



JEFFREY SCHOENBERGER

Jeff is our resident Apple guru. After practicing law as an Equal Justice Works / AmeriCorps Legal Fellow for the Legal Aid Society of Southwest Ohio, Jeff joined Affinity, and brought his unique ability to discover faster and better ways for clients to do everyday tasks to our team. Because Jeff understands the worlds of both PC and Mac users, clients using any type of system can count on him to help with desktop office software and document assembly needs regardless, of the type of computer an office has. Jeff is also well versed in Apple's iOS, so he can aid clients in making the most of their tablets and mobile devices.



MEET OUR TEAM OF HOTDOCS EXPERTS CONT.

DANIELLE DAVISROE

After working as an attorney in domestic relations for several years, Danielle found her way to Affinity and to this day she is always on the lookout for better ways to do things. She carries new strategies she finds with her as she works with the clients her team supports. Danielle has a Bachelor of Science in Business Administration from The Ohio State University Fisher College of Business and a Juris Doctorate from The Ohio State University Moritz College of Law.



ADAM RINGEL

With four years' experience as a personal injury attorney, Adam is a valuable member of our document automation team. In addition to his skill in helping make legal drafting more efficient through technologies like HotDocs and Microsoft Word, Adam provides training on the Microsoft Office Suite and builds custom data queries for our clients. With the highly collaborative nature of the document automation team based in Columbus, Adam is constantly invigorated by his colleagues. The group consistently helps one another find new insights and perspectives along the path of finding the solutions our clients need.



CYARA HOTOPP

After graduating cum laude with a Bachelor of Arts in Philosophy from The Ohio State University and a Juris Doctorate from The Ohio State University Moritz College of Law, Cyara knew she wanted to use her education to solve problems for legal professionals. She is also currently working on getting an MS in Information Assurance. Cyara works with law firms and legal departments to help streamline the drafting of complex documents. Her technological understanding coupled with her background in law means she doesn't just make a document work properly, but she also advises on truly improving the document from a best practices perspective.



HOTDOCS FOR COMPLEX LEGAL DOCUMENTS

TABLE OF CONTENTS

1 DOCUMENT ASSEMBLY INTRODUCTION

About This Class.....	1
Other Document Assembly Options.....	1
Document Assembly - Its raison d'être.....	1
Advantages	2
How It Works - Big Picture	3
HotDocs Versions.....	3
Get a Free Trial.....	4

2 CREATING TEMPLATES

Types of Templates	5
Component Files.....	5
Library Files.....	6
Answer Files.....	6
Default Settings to Change and Other Adjustments.....	7
Create a New HotDocs Library.....	9
How To Determine Suitable Documents for Automation.....	10
Important Step Before You Start.....	10
Create a New Template Based Upon an Existing Template	18
HotDocs Toolbar	18

3 ASSEMBLING DOCUMENTS

What Happens	20
Steps For Assembly.....	20

4 INSERTING VARIABLES

In General	23
Variable Types.....	23
Two Parts of a Variable	23
How It Happens	23
Naming Variables.....	23
Prompts	24

Steps for Inserting Variables 24

5 TEXT VARIABLES

When To Use Text Variables..... 27

Text Variable Options..... 27

Exercises 29

6 DATE VARIABLES

When To Use Date Variables..... 32

Date Variable Options..... 32

Exercises 33

7 NUMBER VARIABLES

When To Use Number Variables..... 36

Number Variable Options 36

Formats..... 37

Exercises 38

8 TRUE FALSE VARIABLES

When To Use True False Variables 41

True False Variable Options 41

Exercises 42

9 MULTIPLE CHOICE VARIABLES

When To Use Multiple Choice Variables..... 44

Multiple Choice Variable Options..... 44

Exercises 46

10 PERSONAL INFORMATION VARIABLES

Description 51

Enter Your Personal Information Into HotDocs 51

Drawback of Personal Information Variables 52

11 DIALOGS

Description 53

When You Should Use Dialogs..... 53

Controlling The Order In Which Your Dialogs Appear 53

Creating Custom Dialogs..... 55

12 COMPUTATION VARIABLES

Description 58

Properties of a Computation Variable 58

Exercises 60

13 LIST OF MODELS AND DESCRIPTIONS

Instruction Models 69

Expression Models..... 73

14 REPEATS (LISTS IN YOUR DOCUMENT)

Description 79

Create a Repeat Instruction..... 79

When Should I Use Repeats?..... 84

15 CONDITIONALLY INCLUDED TEXT

Description 85

Make Text Conditional..... 85

Exercises 87

16 HOW TO MOVE TEMPLATES

Background..... 91

Steps To Move Templates 91

Steps to Add Existing Templates to a Library..... 92

5 TEXT VARIABLES

WHEN TO USE TEXT VARIABLES

Text variables merge text into your document (which can include any character on the keyboard). Use them when you don't want to give the user a set of choices or options. If you want to present the user with a choice of possible answers, then a multiple choice, true/false or computation variable may be more appropriate (more on those later).

If You're Merging Numbers Instead of Text

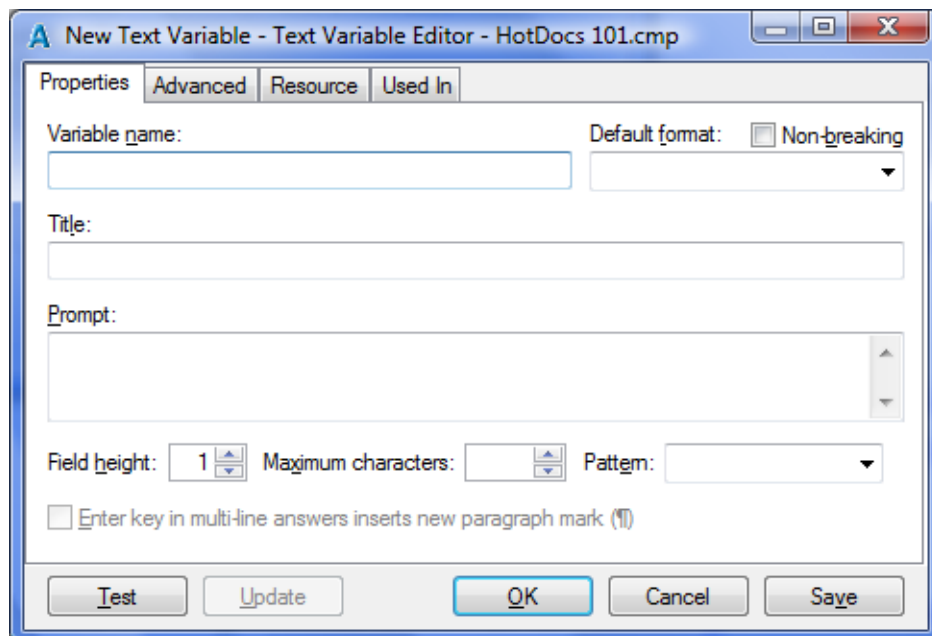
Text variables should also be used to merge numbers that serve as identifiers and which cannot be used in a mathematical calculation (social security numbers, phone numbers, zip codes, etc.). Ask yourself if the number in question could possibly be used in a mathematical calculation. If it could not, then you should use a text variable instead of a number variable. For example, social security numbers, phone numbers, zip codes and tax ID numbers should all be text variables and not number variables even though they are comprised exclusively of numbers.

TEXT VARIABLE OPTIONS

When you create a Text variable, you can decide how the text will be formatted when it is merged into the assembled document. You can also add a prompt to help the user know how to answer the question, and add a help "Resource" or select other advanced options that determine how the variable will be processed.

Editing the Properties of a Text Variable

Select the text or blank that you'd like to replace with a Text Variable and insert a text variable as described previously. Now click the Edit Component button.



The following is a description of the properties of a Text Variable that you can edit.

To	Do This
Specify a default format that will be applied to all instances of the variable (you'll be able to change from the default any time you insert the variable)	Select a format from the Default format drop-down list. If your variable will hold a name, see TIP - Formatting Names below. Optionally, to keep the answer from breaking across lines in the document, select Nonbreaking .
Provide users with additional information about the variable	Type a prompt (question) in the Prompt box. This information replaces the Variable name when the variable is presented during assembly.
Specify an alternate name for the variable	Enter a title in the Title box (this will appear in the interview)
Control what type of information a user types and format it as they type	Select a pattern from the Pattern drop-down list. If you don't see the one you need, you can make your own - see TIP - Custom Patterns below. NOTE: This features is not supported in HotDocs Online
Control the number of characters allowed in the answer	Either type a value in the Maximum characters box, or click the up or down arrows to select a value (up to 15,000 characters). Leaving this field blank defaults it to 15,000 characters.
Control how an answer is merged in a Word document when the user presses Enter in a multi-line answer field. The type of answer required determines which break should be used. For example, if the user must enter separate paragraphs of text, HotDocs should merge a paragraph break (¶). However, if the user must enter separate lines in a single paragraph (such as lines in an address), HotDocs should insert a line break (↵).	Select Enter key in multi-line answers inserts new paragraph mark (¶).
Change the height of the answer field that appears during assembly	Either type the number of answer field lines (up to 12) in the Field height box, or click the up or down arrows to select a number. This will give the user a visual clue that it's okay to hit hard returns and/or enter more than one line of text. It obviously also makes it easier for the user to see what they've already typed.
Provide users with helpful information that can assist them in providing the correct answer	Click the Resource tab and provide a Resource option. By typing in the "Text" blank within the Resource Tab, it will add a ? button to the right of the variable. If the user clicks it, they'll see the help text you provided. For purposes of this class, just stick with Plain Text in the Resource Type.
Find out which dialog is used to display a variable	Click the Asked In tab.

TIP - Formatting Names

If you're creating a name variable, be wary of using the "Like This" format example. If you enter a name like "McDonald," the "Like This" format will insert "Mcdonald" into the document. Therefore, if you want a name entered in lower case, we recommend that you leave the format blank and notify the user in the prompt (see below) how you would like the name entered.

TIP - Custom Patterns

NOTE: This feature is not supported in HotDocs Online. You can create your own pattern by typing it in the Pattern box. Use the following codes to create patterns:

Custom Patterns:

Code	HotDocs Meaning
X	any character
9	any numeric character
A	any alphabetic character
U	uppercase alphabetic character
L	lowercase alphabetic character
N	alphanumeric character (9 and A)
H	hexadecimal character (0-9, A-F, a-f)

You can also insert hyphens, periods, static text, etc. within these codes. To insert the foregoing characters as static text and not codes, enter a forward slash (/) and then the character. Note, this also applies to the forward slash character itself (i.e., to enter a slash as static text, you must enter // into the pattern).

EXERCISES

Example 1:

Original sentence:

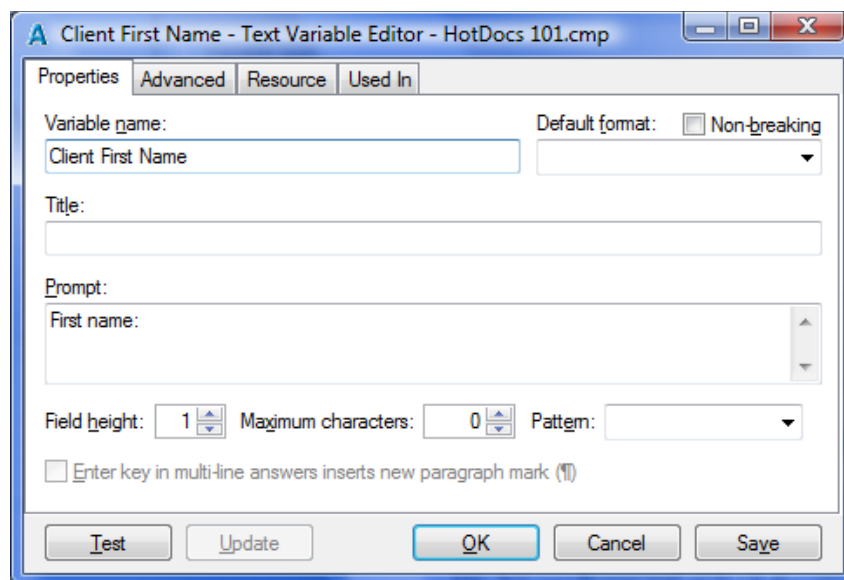
The client's name is John A. Doe.

After coding:

The client's name is «Client First Name» «Client Middle Name» «Client Last Name».

NOTES: In order to create maximum flexibility with the variables you create in your template, it is recommended that you create separate variables for first, middle and last name. In this manner, you could use the same variables in a letter in which the recipient was addressed:

Dear «Client First Name»:



Example 2:

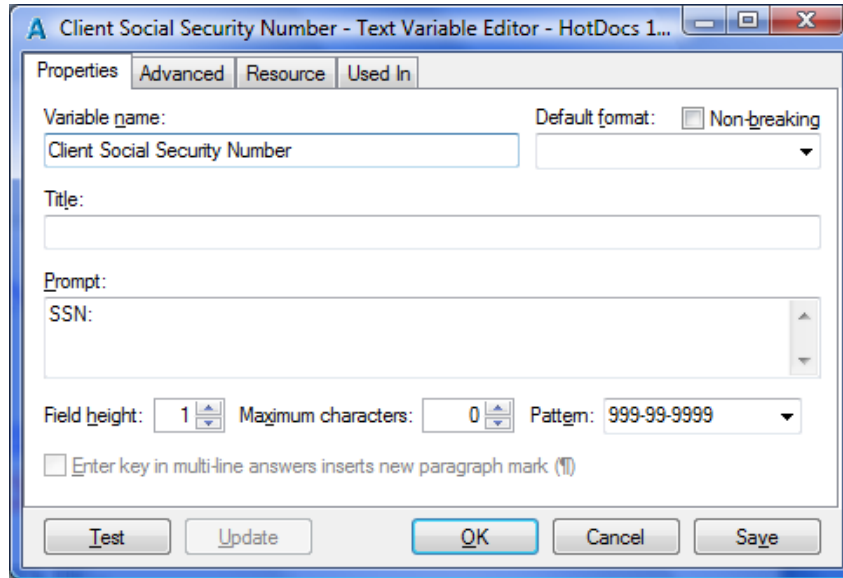
Original sentence:

John A. Doe's social security number is 555-55-5555 and his phone number is (614) 555-5555.

After coding:

John A. Doe's social security number is «Client SSN» and his phone number is «Client Phone Number».

NOTES: The key here is to use the Pattern. This not only prevents the user from entering letters, but it also saves two keystrokes since the hyphens are automatically inserted with the pattern.



Example 3:

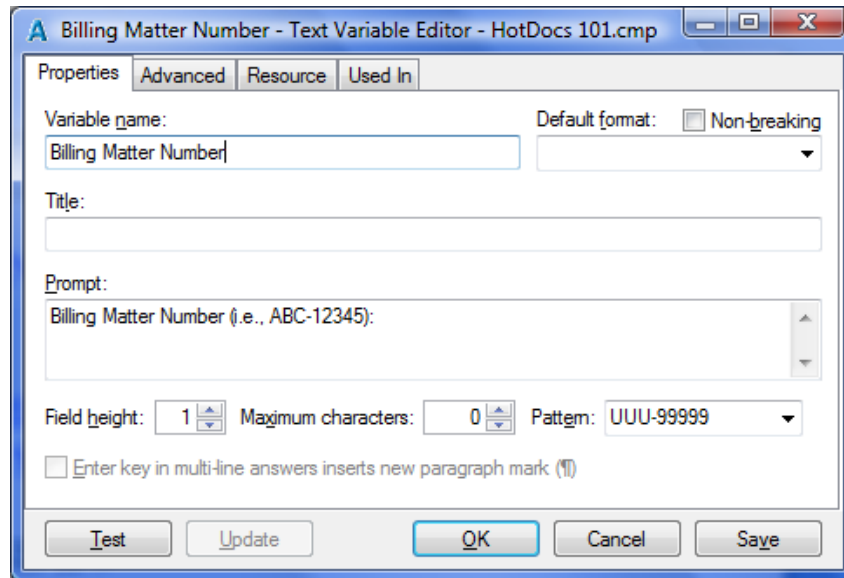
Original sentence:

The billing matter number is ASX-44221.

After coding:

The billing matter number is «Client Billing Matter Number».

NOTES: In this example, we're creating a custom pattern using the codes set forth above. Since this pattern consists of three letter and five numbers, it looks like this: UUU-99999. When using a custom pattern, it's advisable to give the user an example of what they're supposed to enter in the prompt.



Example 4:

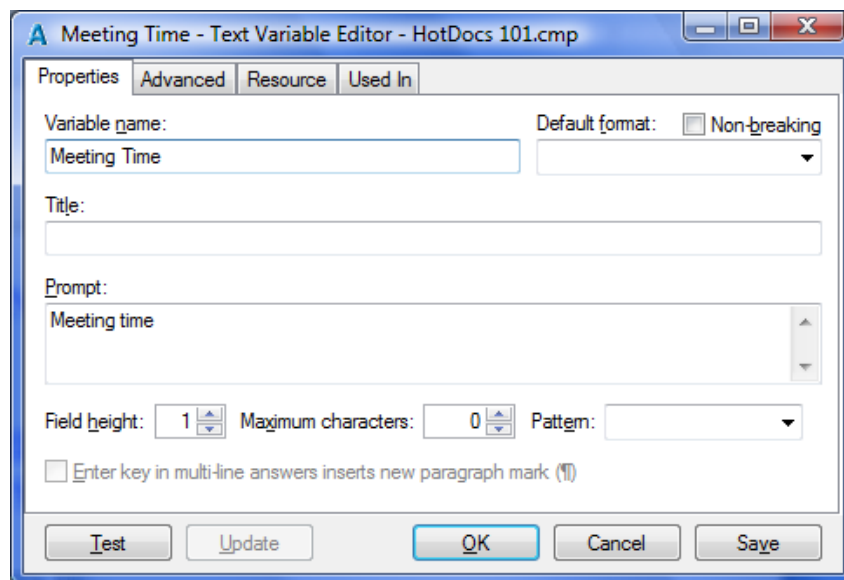
Original sentence:

The meeting will occur tomorrow at 8:30 AM.

After coding:

The meeting will occur tomorrow at «Meeting Time».

NOTES: The custom pattern for showing time is 99:99 am and it must be typed exactly in that manner for it to work.





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