

# HOTdocs™ 10

User

Installation Guide and  
Tutorial

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# Chapter 1: Getting Started

## Overview

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This manual is divided into two chapters:

### **Chapter 1: Getting Started**

This chapter contains information about installing and uninstalling HotDocs® User 10. It also contains information on how you can get help while using HotDocs.

### **Chapter 2: HotDocs User Tutorial Lessons**

This chapter contains lessons for assembling text-based templates and using template libraries. Each lesson is self-contained and can be completed in short blocks of time.

## Default File Locations in HotDocs 10


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. In most situations, HotDocs uses this information each time you perform a task in HotDocs. For example, each time you create a new template library, HotDocs suggests a default location for the new library, based on the information it finds in the System Registry.

The following is a list of these default locations:

### Note

On Windows Vista and Windows 7, the *My Documents* folder has been named *Documents*. The *All Users Documents* folder has been named *Public Documents*.

File Type	Default Location
Program Files	<Program Files>\HotDocs\
XML Schema Files	<Program Files>\HotDocs\Schemas\
Help Files	<Program Files>\HotDocs
Spelling Dictionary	<My Documents>\HotDocs\Spelling
Library Files	<My Documents>\HotDocs\Libraries
Template Files Includes text templates, form templates, interview templates, and auto-assemble files	<My Documents>\HotDocs\Templates
WordPerfect Macro Files	WordPerfect Macro Folder
MS Word Startup Files	Microsoft Word 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

Once HotDocs is installed, you can change most of these locations. To do this, click the  **HotDocs Options** button in the library toolbar and either click the **File Locations** folder or expand the **Word Processors** folder. See the HotDocs Help for details.

### Note

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.

# Compatibility of HotDocs 10 Files with Earlier Versions of HotDocs

This topic describes the compatibility of files between earlier versions of HotDocs and HotDocs 10:

## Installation of Program Files

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When you install HotDocs User 10 over earlier versions of HotDocs Developer, User, Professional Edition, Standard Edition or User (starting with HotDocs 6), it overwrites that installation.

## Library Files

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### Template Libraries

Template libraries created and saved in HotDocs 2008 and earlier were saved in binary format. Starting with the release of HotDocs 2009, however, template libraries can be saved in either binary format or as XML. When you open an existing template library in HotDocs 10, HotDocs keeps it in binary format until you either manually convert the file to XML format, or you attempt to use foreign characters in the properties of the library, at which time HotDocs will prompt you to save the file in XML format.

To manually save the file in either format, choose **Save Library As** from the **File** menu and then choose the option you want from the **Save as type** drop-down list. Foreign characters are characters that are not compatible with your system's default language.

### Answer Libraries

HotDocs 6 through HotDocs 2008 supported binary answer libraries (or answer libraries with the .HAL file name extension). Starting with the release of HotDocs 2009, however, HotDocs now supports both binary answer libraries and XML-based answer libraries (which use the .HDL file name extension). By default, HotDocs will continue to use binary answer libraries as long as the answer file properties of items in the library use characters that are compatible with your system's default language. If you define answer file properties that contain foreign characters, HotDocs will create an XML-based answer library (so that it can properly display these characters in the **Properties** tab of the library window.)

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#### --- Caution ---

If you are working in HotDocs 10, but the library needs to be compatible with HotDocs 2005-2008, do not use any foreign characters (for example, characters that are not compatible with your system's default language) in the library properties. Any foreign characters you use will appear as boxes or question marks in HotDocs 2005-2008.

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## Answer Files

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HotDocs 6 through HotDocs 2008 support two types of answer files—binary answer files (.ANS) and XML answer files (.ANX). Starting with HotDocs 2009, answer files are saved in XML format only. This means that if you open a binary answer file (an .ANS file) in HotDocs 10, change one or more answers, and then save, the answer file will be saved as XML. The file extension will not be changed, but will continue to be .ANS even though the file is in XML format.

If you are using HotDocs 10 to create answer files for use with earlier versions of HotDocs, you must save the answer file in a backwards-compatible format. Specifically, if you need to use the answer file with HotDocs 2005 through HotDocs 2008, you must save the file as a HotDocs 2005-2008 answer file. You can select this format at the **New Answer File** dialog box or the **Save Answer File As** dialog box. You can also select it at the **Item Properties** dialog box for the answer file. Any unsupported foreign characters you use will appear as boxes or question marks in HotDocs 2005-2008.

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**Note**

HotDocs 10 answer files can be used with HotDocs 2008 SR2 or higher without making the files backwards compatible.

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# System Requirements

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

## Hardware

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

## Software

- Windows XP (SP1 or higher), Windows Vista, or Windows 7
- Microsoft Internet Explorer 6.0 or later
- Microsoft Word 2000, XP, 2003, 2007, or 2010
- Corel WordPerfect 8, 9, 10, 11, 12, X3, X4, or X5

### ----- Caution -----

WordPerfect X3 SP2 and later are the only versions of WordPerfect supported for use on Windows Vista and above.

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## 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 10

Before installing HotDocs 10, make sure your computer meets the minimum requirements necessary for using HotDocs. (See “System Requirements” on page 5.)

### To install HotDocs 10

1. Uninstall any existing versions of HotDocs you have installed. (See “Uninstall HotDocs” on page 7.)
2. Close all open applications, especially any word processors.
3. Locate and double-click the file **setup.exe** (for 32-bit operating systems) or **setup64.exe** (for 64-bit operating systems). The installation program begins installing HotDocs.
4. Follow the on-screen prompts to complete the installation.

## 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 installation program does not remove any custom templates, libraries, or answer files you have created.

### To uninstall HotDocs in Windows XP

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

### To uninstall HotDocs in Windows Vista and above

1. At the **Start** menu, select **Control Panel > Programs > Uninstall a Program**.
2. Select the version of HotDocs that needs to be removed, then click **Uninstall**.
3. Follow the on-screen prompts to remove the application.

--- **Note** ---  
If you plan to reinstall HotDocs to restore default settings, you must delete the user-specific settings HotDocs entered in the System Registry. For details on doing this, see "Understand HotDocs Installation" on page 8.

## 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 allows the application to be installed just once for multiple users on a single workstation. It also allows each user who logs on to the workstation to have his or her own custom files and settings.

### HotDocs Setup

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When you first install HotDocs from *setup.exe* or *setup64.exe* (see “Install HotDocs 10” on page 6), 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 and JavaScript files (which are needed for developing HotDocs Server templates). These files are installed, by default, to *C:\Program Files\HotDocs*. 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

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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, the user spell-checking dictionary, and the HotDocs tutorial files. 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.

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 settings with their own preferences.

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.

--- **Note** ---

Even if you delete the tutorial files that are installed to your default *Templates* folder, because of the Current User Setup, the next time you start HotDocs, HotDocs will recopy the files to that folder. To keep this from happening, open the **Source** folder, select the **Tutorials** subfolder and press **Delete**.

## 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.

--- **Caution** ---


You must be extremely careful when working in the System Registry. Failure to follow the instructions below exactly could result in your making changes that negatively affect all the programs on your computer. You may want to ask your system administrator for help if you are unsure of what you are doing.

### To restore default settings

1. At the **Start** menu, select **Run**. The **Run** dialog box appears.
2. In the **Open** box, type **regedit** and click **OK**. The **Registry Editor** appears.
3. Navigate to **HKEY\_CURRENT\_USER > Software > HotDocs > HotDocs**.
4. Select the **HotDocs 10** subfolder and press **Delete**. Click **Yes** to confirm the deletion.
5. Check for the registry key **HKEY\_CURENT USER > Software > LexisNexis > HotDocs 6**. If it exists, proceed to Step 6. Otherwise, proceed to Step 7.
6. Select the **HotDocs 6** subfolder and press **Delete**. Click **Yes** to confirm the deletion.
7. Close the **Registry Editor**.

## Start and Exit HotDocs

Before you edit templates or assemble documents, you must first open the HotDocs library, which provides the functionality for working with your template files.

**Tip:** To start HotDocs, you can also click the  **HotDocs** button in the word processor toolbar. This will open and display the HotDocs library window.

### To start HotDocs

- Choose **HotDocs 10 > HotDocs User** at the **Start** menu. The HotDocs library window appears.

### To exit HotDocs

- Choose **Exit** (**File** menu).

# Contact HotDocs Limited

## Contact Customer Service

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Experienced HotDocs consultants are available to help you with a variety of services, including integrating HotDocs with other products, building a template library, or providing training. Please contact us using any of the following methods.

### In the United States:

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<http://www.hotdocs.com/services/>

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0131 220 9024 (Fax)  
+44 131 220 9024 (International Fax)

[info@hotdocs.co.uk](mailto:info@hotdocs.co.uk)  
<http://www.hotdocs.co.uk>

## HotDocs Information on the Web

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You can access other information about HotDocs by visiting the HotDocs Web site (<http://www.hotdocs.com>). At this site, you can

- Participate in the HotDocs user forums.
- View the HotDocs Knowledge Base.
- Download additional HotDocs tutorials.
- Find information about the different HotDocs products and services that are available.

# Get Help While Using HotDocs

## HotDocs Help Window Overview

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HotDocs includes a help file to assist you in using the product.

--- **Note** ---

The HotDocs Help window is divided into three parts—the navigation bar along the top of the help window, the main help content pane, and the topic navigation path that appears along the bottom of the window (which is visible as you are viewing specific help topics). As you view individual help topics, related topics are displayed in the right-hand navigation bar.

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## Organization of the Help File

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Content within the help file is categorized into four main areas:

1. **Overviews:** These topics describe, in general terms, a particular feature or tool of HotDocs.
2. **How do I ...?:** These topics provide step-by-step instructions for completing a task in HotDocs.
3. **Reference Material:** These topics offer additional information about a HotDocs feature or tool, such as background data or tips.
4. **Dialog Box Descriptions:** These topics provide information for a specific dialog box or window in HotDocs. (You usually access these help topics by clicking the **Help** button on a dialog box that has one.)

**Tip:** Click the **Glossary** link in the navigation bar to search for a definition of a specific HotDocs term.

## Find Topics in the Help File

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To use the help file, you have several options:

- Click the **Home** link in the navigation bar to view the main “table of contents” for the help file. This displays a page that describes sections of the help file. You can click a folder and navigate to the specific help topic that most interests you.
- Click the **Index** link to view a listing of all the topics in the help file, referenced by index keyword.
- Enter a search term or phrase in the **Search** box and click **Search** to view topics that contain your search phrase. If the search phrase is found, a **Search Results** page is displayed, showing the different topics, grouped by category, that meet your criteria.

## What's This? Help and Dialog-Level Help

HotDocs provides two other types of help—**What's This? Help** and **Dialog-Level Help**.

**Tip:** If no **What's This?** help button is available, you can press **Ctrl+F1**.



- To access **What's This Help**, at any dialog box where **What's This? Help** is available, click the **What's This? Help** button, either on the title bar (??) or on the toolbar (??), and then click the item for which you want help.
- To access dialog-level help, click the **Help** button at any dialog that contains one.



## Form a Help Search Query

Using Search is perhaps the most powerful option you have for searching the help file. To form a search query, please keep the following in mind:

- If you want to find a topic that contains two or more terms, regardless of where the terms appear in the topic, enter those terms in the search box. For example, if you want to find a topic on using the instant update feature for a document, you could enter the search words *instant update document*. All topics that contain all of those search terms are listed in the results.
- To search for a specific phrase, you can surround the phrase in quotation marks. For example, to find information about the **Highlight Fields** button, enter the search phrase (including quotation marks) *"highlight fields button"*. All topics with that exact phrase are listed on the **Search Results** page.
- You can also search using Boolean phrases such as **AND**, **OR**, and **NOT**:
  - Words separated by **AND** will display results that contain all of the words in your search. (This is the way Search works by default.)
  - Words separated by **OR** will display results that contain either of the words in your search. (For example, you could search using *"intake interview" OR "interview template"* and view all topics that contain either of those phrases.)
  - Words separated by **NOT** will display results that contain the first word in the search, but not the second. For example, if you want to find all topics that contain the word *group* but not *table*, you could enter the search phrase *group NOT table*.

## Other Help Resources

- Click the **Contact** link to view different options for contacting HotDocs Ltd.
- Click the **Glossary** link to view a glossary of HotDocs terms.
- Click the  **Print Topic** button to print a help topic.
- Click the  **Highlighting** button to control whether search terms are highlighted or not.

- Click the  **Increase Size** or  **Decrease Size** buttons to increase or decrease the font size used for viewing the help file.

## Documentation Feedback

To improve the quality of the tutorials and the help files, we invite you to make comments or suggestions. When doing so, please include as much information about your experience using the documentation as possible. For example, include which version of the product you are using, as well as whether your suggestion is in regards to the printed *HotDocs Installation Guide and Tutorial* or the electronic help file. If commenting about a specific topic, include that information as well.

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**Note**

Please keep in mind that we cannot respond to technical support or project consulting issues. We are mainly interested in problems with the documentation itself—such as erroneous information, grammatical and spelling errors, or suggestions for topics to include in the next release of the software.

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E-mail your comments and suggestions to [publications@hotdocs.com](mailto:publications@hotdocs.com).

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# Chapter 2: HotDocs User Tutorial

## Overview

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The lessons in this chapter introduce you to important concepts and features available in HotDocs User. Because of the work you do in these lessons, when you begin automating your own documents, the procedure should be familiar to you, allowing you to focus on your documents, not HotDocs.

These lessons are short and are structured so you can complete each one in separate sessions. This allows you to learn HotDocs in the spare minutes you have during the day. You do not need to dedicate a large block of time to using the tutorial.

You should complete all of these lessons in order. In these lessons:

- You will learn how to create template libraries and add templates to them.

--- **Caution** ---  
The documents used in these tutorials were drafted to suit the purposes of the tutorial. They are not provided as valid legal documents.  
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## What is HotDocs?

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In your day-to-day routine, you may need to create custom documents for clients or customers. Without HotDocs, you must manually search through the document and replace the text that needs to be changed with the new information. This process can be time-consuming and error-prone.

Using HotDocs, however, you can create a custom document by assembling an interactive template. As you do this, you will be prompted for the information needed in the document and that information will be merged into the document.

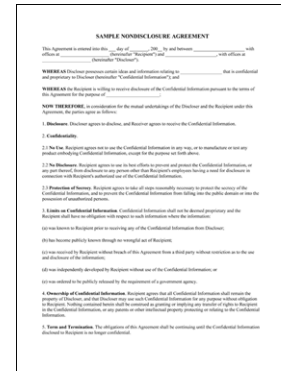
By completing the various tutorials in this guide, you will learn how to use HotDocs to transform documents you regularly customize for clients into HotDocs templates.

# Lesson 1: Assemble a Document

## Overview

There are two types of templates with which you work in HotDocs—text templates and form templates:

- Text templates** are automated in a word processor, such as Microsoft Word or WordPerfect. Placeholders in the text indicate where users' answers should be merged. When you assemble a text document, you save the document as a regular word processor file. You have all of the editing capabilities that are included with word processor files.



- Form templates** use a Windows program (such as a form design program) to create a static form, or one in which the user will not be able to change or modify the underlying text. When you assemble a form document, you can view the assembled document in either HotDocs Filler or a PDF viewer.



When you use HotDocs to assemble a document, HotDocs presents a series of questions you must answer in an interview. Your answers are then merged into the assembled document. Once all of the answers are provided and you have verified that the document is correct, you can print the document or save it to disk. You also can save the answers you've provided in an answer file, which you can reuse to assemble other documents.

The following diagram shows the assembly process:



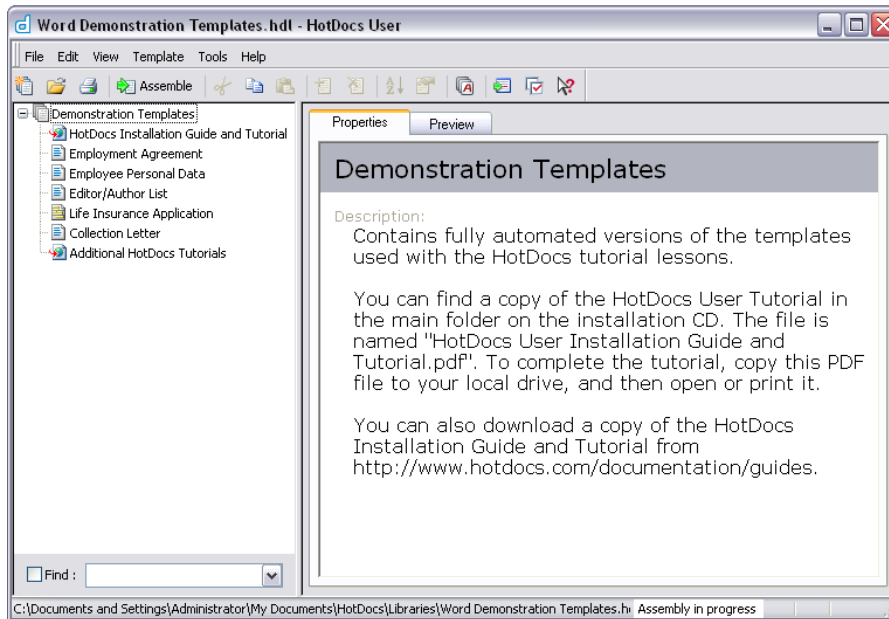
## Start HotDocs and View a Template Library

To start the tutorial, you must first open the HotDocs template library.

A template library allows you to manage a collection of template files associated with a specific project or area of business. Using the tools available in the library, you can edit templates, assemble documents, and access other HotDocs tools, such as Answer File Manager, HotDocs Options, and Component Manager.

### To start HotDocs

- Choose **Start > Programs > HotDocs 10 > HotDocs User**. The **Demonstration Templates** library appears.



### Note

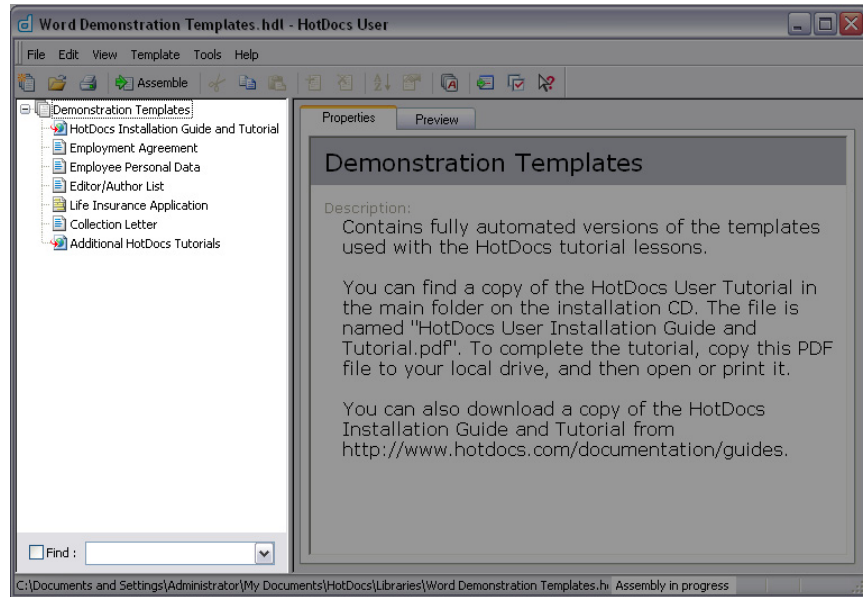
If the **Demonstration Templates** library does not appear, choose **Open Library (File menu)**, select the library for your word processor in the default **Libraries** folder (for example, **Word Demonstration Templates.hdl**), and click **Open**.

This *Demonstration Templates* library you are viewing includes fully automated versions of the templates you will automate throughout this tutorial. You may refer to these templates for help as you complete the different lessons in the tutorial.

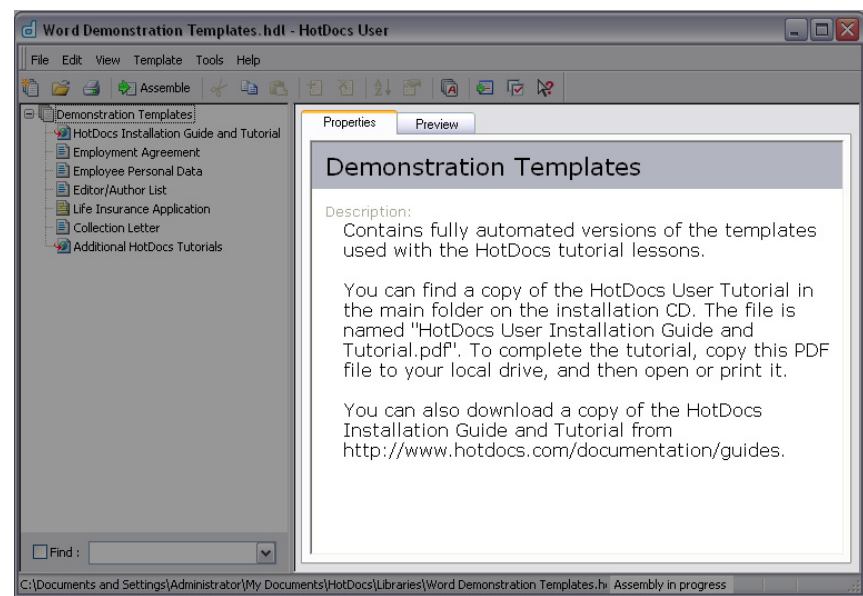
**Tip:** Items referenced in a template library act as shortcuts to the actual files on disk.

**Tip:** The items you see in the left pane are not the actual HotDocs files on your local disk or network. Instead, they are *references* to the files, operating similar to Windows-type shortcuts. When you select an item for assembly, HotDocs follows the assigned file path to locate the actual template and then opens it.

The template library is divided into two main panes. The left pane shows a list of the items referenced in the library. These items can include folders, templates, clause libraries, or other files.



The right pane displays two tabs of information about the selected item. If you click the **Properties** tab, you can see the properties of the selected file. If you click the **Preview** tab, you can preview the template's contents.



## Assemble a Custom Document


Once you have opened the tutorial library, you can select a template for assembly.

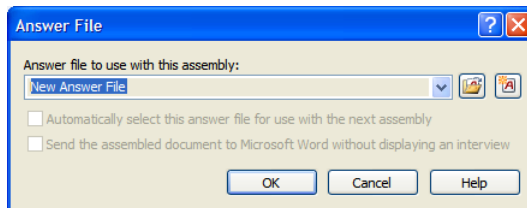
Each time you use a template to assemble a document, HotDocs displays a series of dialogs that prompt you to provide variable information, or information that changes for whomever the document is being created. (Examples of variables include names, dates, and instructions for conditional paragraphs).

Once you have entered the information the document requires, HotDocs merges your answers and carries out your instructions to produce a finished document. The document can then be printed, saved, or edited further.

To see how a HotDocs template produces a complete document, you will assemble an *Employment Agreement*. (You will automate your own copy of this template later in this tutorial.)

### To assemble the Employment Agreement document

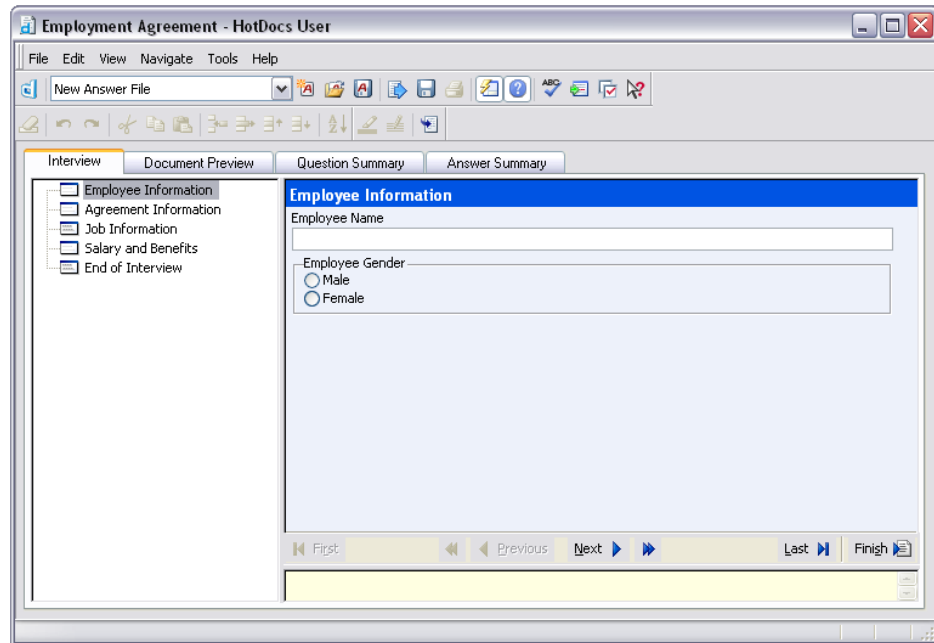
1. From the template list, select **Employment Agreement** and click  **Assemble**. The **Answer File** dialog box appears.



The **Answer File** dialog box shows a new, untitled answer file as the answer file that will be used with this assembly. This file does not yet contain any answers.

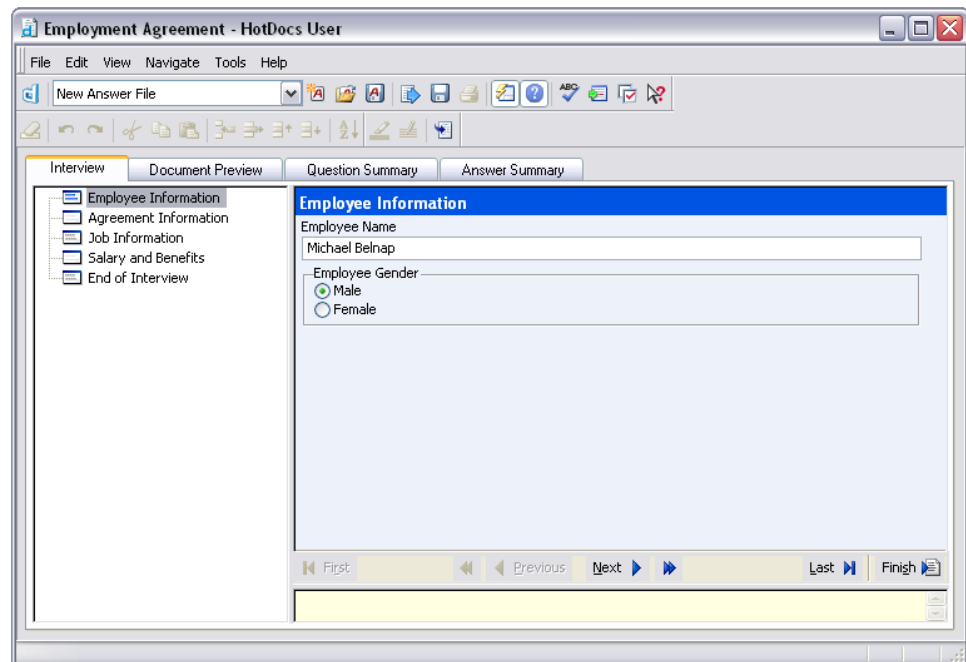
As you assemble documents, you can save your answers in an answer file, which can then be reused if you reassemble this document or if you assemble other documents that require similar information.

Click OK to continue. HotDocs displays the interview.




You see a list of dialogs (or groups of questions) in the left pane of the window. These dialogs comprise the *interview outline*. When you click one of these dialogs, HotDocs displays the associated questions and answer fields in the right pane, or *dialog pane*.




2. At the first dialog, **Employee Information**, type a name in the **Employee Name** answer field.
3. Answer the **Employee Gender** question.



- Click ► **Next** (or press **Page Down**) to advance to the next dialog, **Agreement Information**.

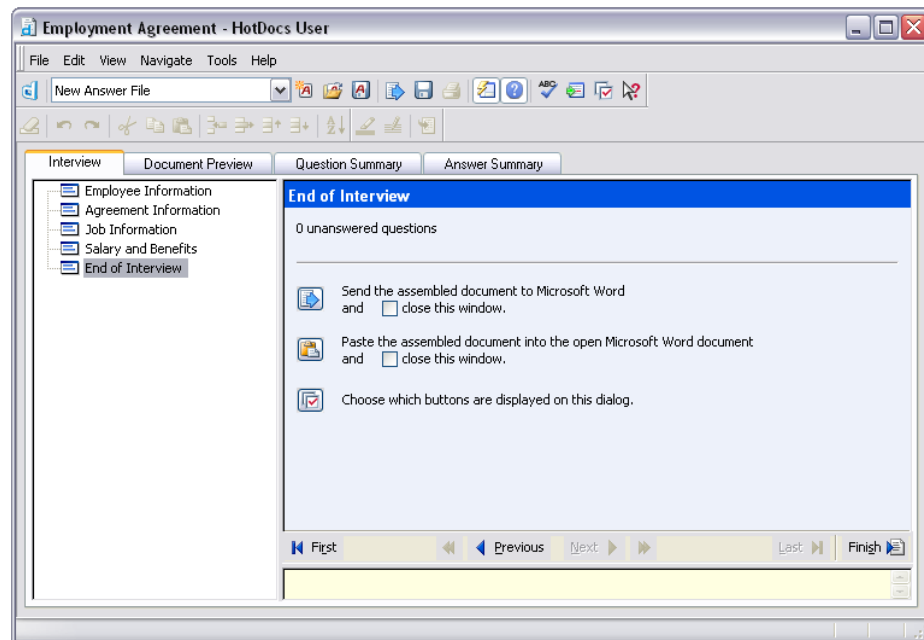
**Tip:** To enter dates, you can type the date directly in the answer field, or you can click the  **Calendar** icon to the right of the answer field and choose a date there.

- Answer questions in the dialog and click ► **Next** to move to the next dialog in the interview outline.

As you proceed through the interview, dialog icons in the interview outline change appearance, indicating whether the questions in the dialog are unanswered () , partially answered () , or completely answered () .

- Continue answering questions in the interview, clicking ► **Next** to move to new dialogs.

After the last dialog, the **End of Interview** dialog appears.



The **End of Interview** dialog gives you options for working with the assembled document. For example, you can send a copy of the assembled document to the word processor.

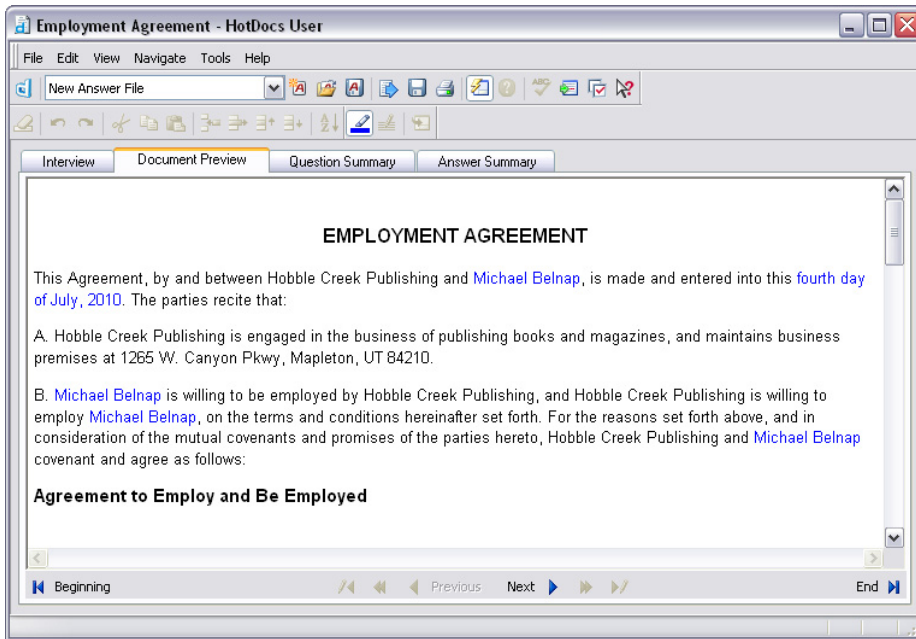
## Preview the Assembled Document

Once an assembled text document is sent to the word processor, the document is no longer associated with HotDocs. This means that if you change any text in the document, including any text that was merged because of answers you entered during the interview, the changes are only reflected in that document—not the template or the answer file. Because of this, you should always review assembled documents for accuracy before sending them to the word processor.

You can review a copy of the assembled employment agreement at the **Document Preview** tab of the HotDocs assembly window.

## To preview the assembled document

- At the assembly window, click the **Document Preview** tab. The assembled document appears.



The **Document Preview** tab shows all of the answers you entered during the interview merged into the document.

### --- Note ---

Because of technical restrictions, HotDocs cannot display the actual word processor document. Instead, it uses a third-party application to render the text of the template or document in RTF format. This means that Word templates or documents are previewed fairly accurately because they are in a format that can be displayed in RTF. Some of the formatting may be different, but, for the most part, it is a good representation. However, because WordPerfect text can't be converted to RTF at the time the document is displayed, the application is only able to display the text in plain format. In either case, however, the actual text in the template or document is correct. And, once you send the assembled document to the word processor, the document will appear exactly as been designed.


## Edit Answers at the Document Preview Tab (Word Users)

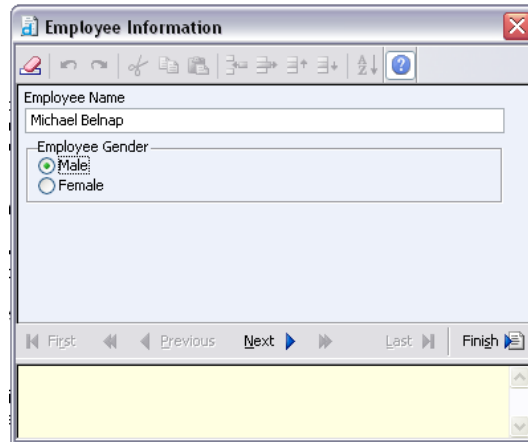
If you are using Microsoft Word, you can change answers while viewing the **Document Preview** tab. When you edit an answer, any other questions affected by the answer are likewise updated.

If you are using WordPerfect, skip to “Send the Assembled Document to the Word Processor” on page 27.


**Tip:** You can also right-click the answer and choose **Edit Answer** from the shortcut menu.

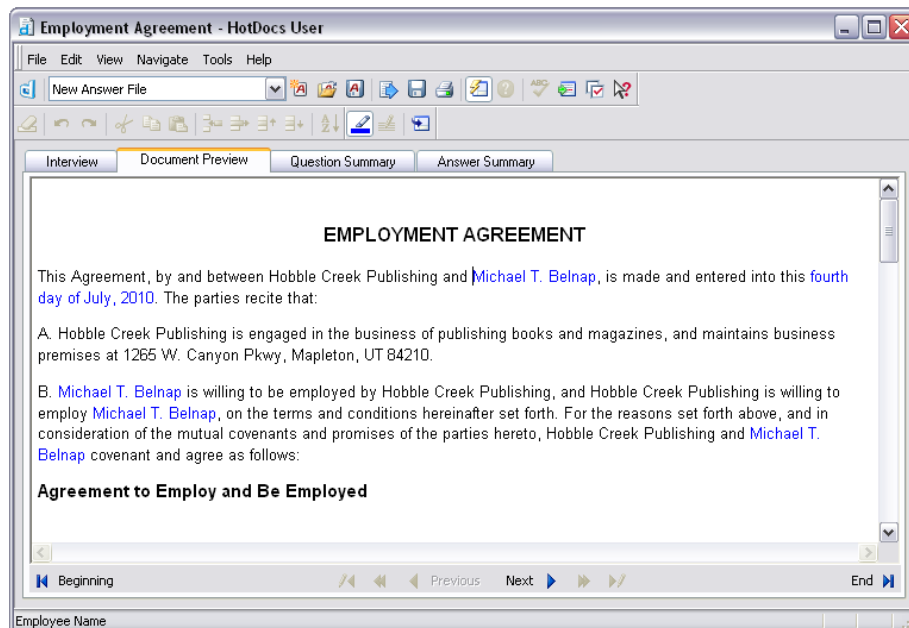
### To edit an answer in the document

1. If answers aren't already highlighted (or marked as blue) in the document, click the  **Highlight Answers** button in the assembly window toolbar.
2. In the first paragraph of the document, double-click the answer for the employee's name. The **Employee Information** dialog appears in a pop-up interview view.



The **Employee Information** dialog box is shown. It has a title bar with a close button. Below the title bar is a toolbar with icons for undo, redo, delete, copy, paste, and help. The main area contains two fields: **Employee Name** with the text "Michael Belnap" and **Employee Gender** with radio buttons for **Male** (selected) and **Female**. At the bottom, there is a navigation bar with buttons for **First**, **Previous**, **Next**, **Last**, and **Finish**.

3. Change the answer in the **Employee Name** field.
4. Click  **Finish**. The pop-up interview closes and all references to the employee's name are updated with your new answer.




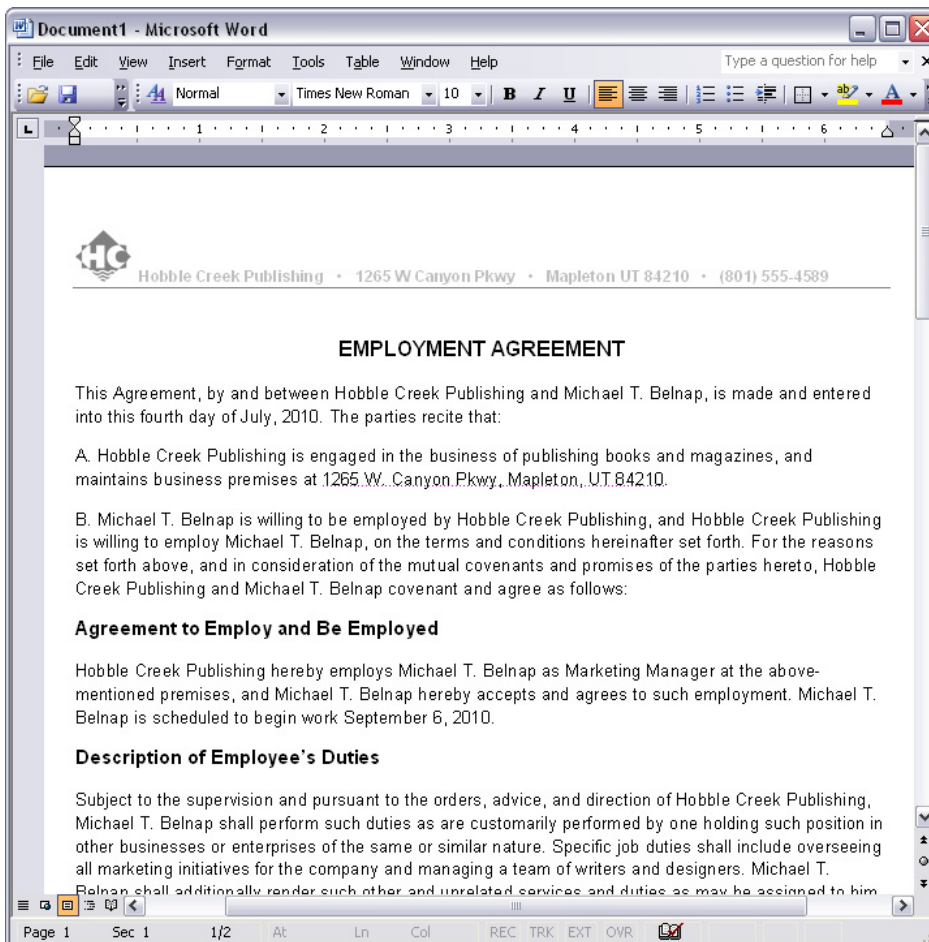
The **Employment Agreement - HotDocs User** window is shown. It has a menu bar (File, Edit, View, Navigate, Tools, Help) and a toolbar with various icons. Below the toolbar are tabs for **Interview**, **Document Preview**, **Question Summary**, and **Answer Summary**. The **Document Preview** tab is active, showing the text of the **EMPLOYMENT AGREEMENT**. The text includes: "This Agreement, by and between Hobbler Creek Publishing and Michael T. Belnap, is made and entered into this fourth day of July, 2010. The parties recite that: A. Hobbler Creek Publishing is engaged in the business of publishing books and magazines, and maintains business premises at 1265 W. Canyon Pkwy, Mapleton, UT 84210. B. Michael T. Belnap is willing to be employed by Hobbler Creek Publishing, and Hobbler Creek Publishing is willing to employ Michael T. Belnap, on the terms and conditions hereinafter set forth. For the reasons set forth above, and in consideration of the mutual covenants and promises of the parties hereto, Hobbler Creek Publishing and Michael T. Belnap covenant and agree as follows: Agreement to Employ and Be Employed". At the bottom, there is a navigation bar with buttons for **Beginning**, **Previous**, **Next**, and **End**. The **Employee Name** field is visible at the bottom of the window.

## Send the Assembled Document to the Word Processor

Now that you have completed the interview and previewed the assembled document, you can send a copy of it to your word processor.

### To send the document to the word processor

1. At the assembly window toolbar, click the  **Send Document to Word Processor** button. HotDocs opens the word processor and displays the complete document.



When the document is in the word processor, you can print, save, or edit it. For the purposes of this tutorial, however, you will simply view the document and then close the word processor without saving the document.

2. Close the word processor document. Do not save it.
3. At the HotDocs assembly window, choose **Close** (File menu). When HotDocs prompts you, don't save your answers or a copy of the assembled document.

**Tip:** Windows Vista users may need to click the document's icon on the Windows taskbar in order to view the document.

You are now finished with this lesson. In it, you learned how to assemble a text document. You also learned how to preview the assembled document before sending it to the word processor.

In the next lesson, you will begin automating your own version of the employment agreement.

If you are not continuing on to Lesson 2, close HotDocs by choosing **Exit** from the template library **File** menu.

## Lesson 2: Create a New Template Library

### Overview

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When you start HotDocs, the template library appears. It is from this window that you begin most tasks in HotDocs, such as creating templates, choosing templates for assembly, and so forth.

The template library itself represents a collection of files you use to create custom documents for your clients. This collection can include text templates, form templates, clause libraries, word processor documents, HTML pages, and PDF documents.

When working with a template library, you should understand that files listed in a library act like shortcuts to the actual files on disk. This “virtual” organization of files provides an easy way to organize and manage the files you use in your practice or business. For example, even though template files can all be saved to the same common folder on disk, within the library, you can organize them into unique folders. Say you are creating an estate planning library. You can create three separate folders in the library, like *Wills*, *Trusts*, and *Other Documents*.

--- **Note** ---  
Template libraries have an **.HDL** file name extension.

### Start the Tutorial

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If you are continuing immediately from Lesson 1, skip the instructions for starting HotDocs and proceed to “Create a New Template Library.”

If you closed HotDocs at the end of Lesson 1, complete the following steps.


#### To start HotDocs

- Choose **Start > Programs > HotDocs 10 > HotDocs User**. The **Demonstration Templates** library appears.


--- **Note** ---  
If the **Demonstration Templates** library does not appear, choose **Open Library** (**File** menu), select the library for your word processor in the default **Libraries** folder (for example, **Word Demonstration Templates.hdl**), and click **Open**.

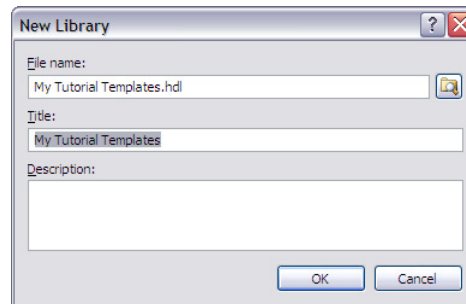
**Tip:** By default, template libraries are created and saved in the *My Documents\HotDocs\Libraries* folder. You can change the default folder at **HotDocs Options**.

## Create a New Template Library

You will create a new template library to organize the templates you will automate throughout this tutorial. (If you ever need to refer back to this demonstration library, simply open it using the  **Open Library** command.)

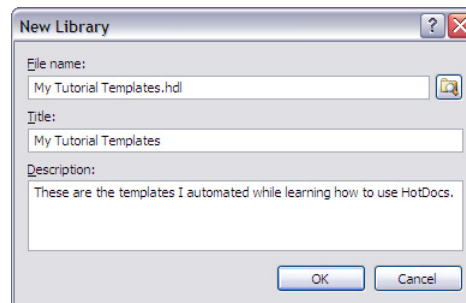
### To create a new library

1. At the existing template library, click the  **New Library** button. The **New Library** dialog box appears.
2. In the **File name** box, enter **My Tutorial Templates**. This is the name of the file that will be saved on disk.
3. Click in the **Title** box. HotDocs suggests **My Tutorial Templates** as the title. This is correct.



The **title** is a required property that is used to identify the library. It is assigned to the top folder in the library.

4. In the **Description** box, type **These are the templates I automated while learning how to use HotDocs**.



The **Description** is an optional property that can provide additional information about the library. It appears in the **Properties** tab of the library.

5. Click **OK**. The **Demonstration Templates** library is closed and the new library is created.

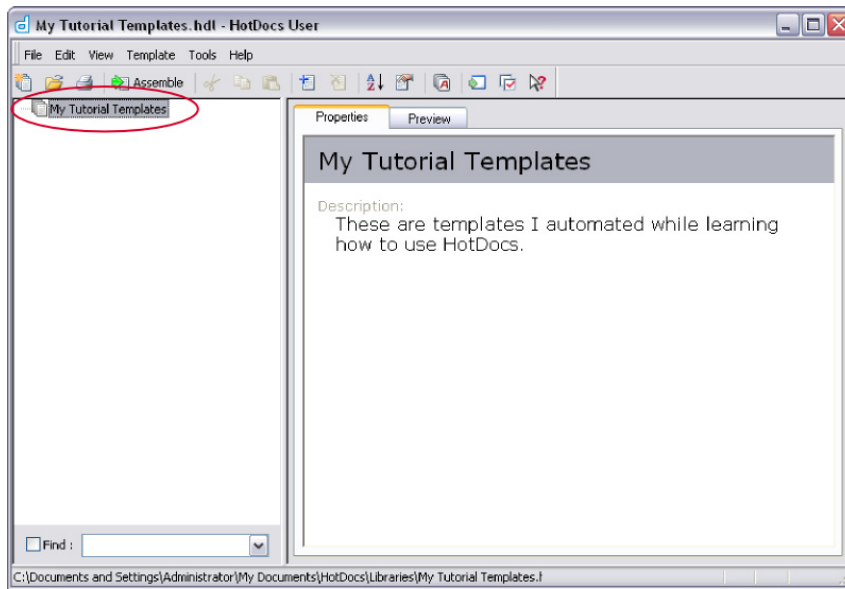
In the next part of this lesson, you will add templates to the library list.


## Add Existing Templates to the Template Library

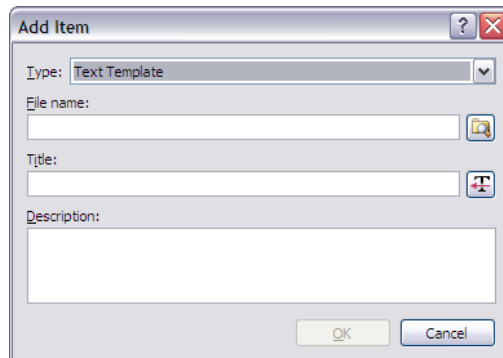
During this tutorial, you will use three different templates. You will add two of these templates, which have already been created for you, to the tutorial library now. (The third template you will create in the next lesson.)


### To add a template to the library

1. Click on the top folder (My Tutorial Templates) in the library.



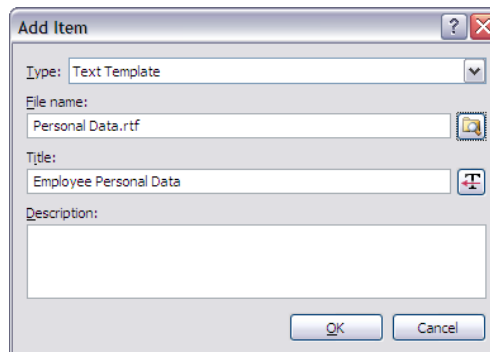
2. Click the  Add Item button. The Add Item dialog box appears.



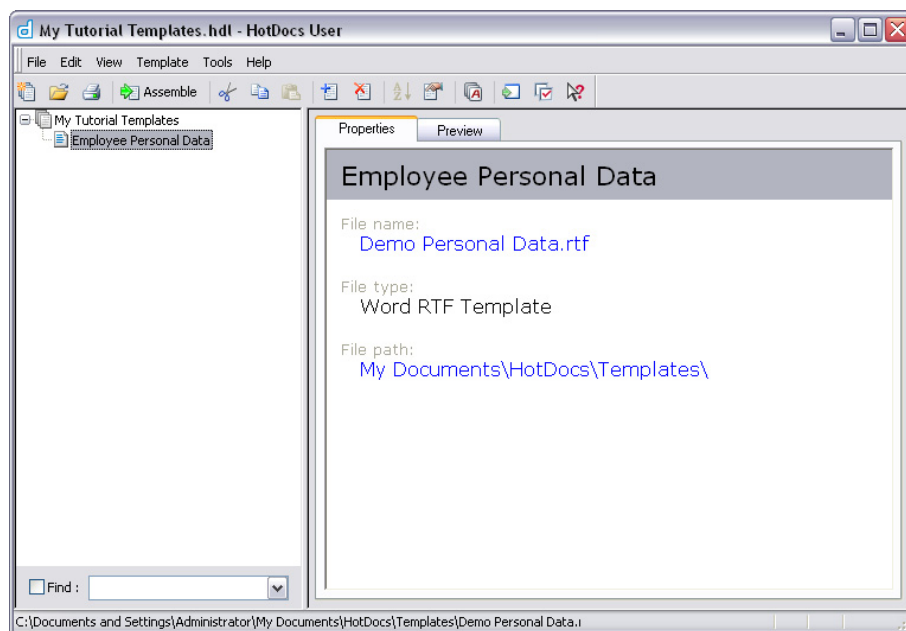
3. Click the  Browse button next to the File name box. The Add Item File Name dialog box appears.

**Tip:** These files are found in your default *Templates* folder, which is *My Documents\HotDocs\Templates* by default.

4. Select **Personal Data.rtf** (Word users) or **Personal Data.wpt** (WordPerfect users) and click **OK**. You are returned to the **Add Item** dialog box.



5. Click **OK**. The file is added to the library.



**Tip:** If you need to move a file in the list to a different location, you can click it and drag it up or down in the list. The horizontal bar that appears indicates where the file will be placed when you release the mouse button.

You will automate this template later in this tutorial.

## On Your Own

Add the template **Editor List.rtf** or **Editor List.wpt** to the library. Follow the instructions in the previous section if you do not remember how to do this.

In the next lesson, you will create a new template and add it to the library.

## Conclusion

You are now finished with this lesson. In it, you learned how to create a new template library. You also learned how to add existing templates to a library.

Close HotDocs by choosing **Exit** from the template library **File** menu.

