Introduction to HotDocs Terminology

Answer File: A saved file that contains the answers entered during an interview. Often users save their answers in a file so they can reuse the data when assembling additional documents.

Assembly Queue: A dialog box that shows a list of assemblies—pending, current, and completed. Users can open the Assembly Queue by clicking the button in the assembly window toolbar. It is most useful when users have selected multiple templates for assembly.

Chevrons: The double-angle brackets (« ») that surround a variable in a text template. Together, the chevrons and variable name make up the variable field, for example, «Client Name». Neither the chevrons nor the variable title are displayed in an actual document.

Child Dialog: A dialog that is inserted within another dialog. When inserted, it becomes linked to that dialog—users can't answer questions in it without first viewing the parent dialog. Usually the two dialogs are related in content or purpose. The options for a REPEAT instruction can reflect in a child dialog.

Clause: Predefined sections of text that can be selected and added to an assembled document. Usually clauses are grouped together in a clause library so users can choose which ones they want to insert, although some clauses may be merged into a document automatically.

Component: An element in a HotDocs template that displays or stores information about the answers that are merged. Examples of components include variables, dialogs, dialog elements, merge text groups, and formats. A single component may be shared across multiple templates.

Component file: The file that stores all of the components used in a template. The component file and template file are both necessary for template development and document assembly to work correctly. Developers use Component Manager to work with components.

Component Manager: The tool used to coordinate component usage in a template. Component Manager shows all of the components used in the template and provides options for working with those components.

Computation variable: A type of component that performs calculations or executes other instructions within the template. Computation variable scripts are created using the HotDocs scripting language.

Conditional text: Text in the template that should be included in the assembled document only under certain circumstances. Conditions are controlled using IF instructions and expressions.

Custom interview: A script that controls how and the order in which variables and dialogs are asked during an interview. The template developer creates this script by using ASK instructions in a computation.

Date variable: A type of component that merges a date in the document.

Dialog:

1. In template development, represents the component in which the developer groups variables and other components.
2. In document assembly, represents the group of questions in the Interview tab of the assembly window where users enter their answers.

Document assembly: The process HotDocs goes through as it processes scripts in the template and merges answers into the document. At the end of the assembly process, the user has a document tailored to his or her needs.

Document Preview tab: A tab of the assembly window that shows how the text document has been assembled using the answers entered in the interview. (See also Form Document tab and Interview tab.)

Dot code: A property that can be assigned to text in a prompt, dialog element, resource, or computation script that either formats the text or inserts characters not commonly supported in plain text. For example, dot codes can be used to apply a bold format to a word in a prompt, or they can be used to insert the subsection (§) symbol.

Field: A place in the template that denotes where users' answers should be merged, or where a specific instruction should be executed. In a text template, a field is denoted by chevrons. In a form template, a field is denoted by a colored box that is overlaid on the form's static text.

Filename Extension: A filename extension is a suffix (separated from the base filename by a dot or space) to the name of a computer file applied to indicate the encoding (file format) of its contents or usage. There are many different types of files that can be converted into templates, examples include: .cmp, .doc, .dot, .docx, .hcl, .hda, .hdl, .hfd, .hpd, .hft, .hpt, .pdf, .rtf, .wpd, .wpt. The following filename extensions represent answer files: .ans, and .anx.

IF instruction (also ELSE IF, ELSE, END IF): A set of instructions and expressions that control the inclusion and exclusion of optional text in a document. IF instructions are based on either True/False variables or true/false expressions. IF instructions can also be used to control whether certain instructions or expressions are processed in computation or dialog scripts. If a user wants to reflect an If instruction in the interview, they can use scripting to gray, ungray, show, or hide the text depending on the corresponding If instruction.

Interview: A presentation of questions that must be answered in order to create an assembled document. The interview is viewable by clicking the Interview tab of the assembly window.

Library: A window used to display and organize templates. The library does not store the actual files—instead, it contains shortcuts (or links) to the files, which are stored separately. In addition to the template library, HotDocs also uses an answer library, which is more commonly known as Answer File Manager.

Merge text: The text that will be merged in a document if a user chooses a specific Multiple Choice variable option. For example, if under gender a user chooses "Male" as the option, a masculine pronoun, such as "he" or "his," can be merged instead of "Male."

Multiple Choice variable: A type of component that merges a predefined answer in the document.

Nesting: Including one element inside of another element. It is common to nest REPEAT fields, If fields, and several other elements.

Number variable: A type of component that merges a numeric value in the document.

Personal Information variable: A type of component that stores basic information about a user, such as a name, a company name, and a phone number. This information is saved in the Current User key of the Windows System Registry. Once answered, users won't be prompted to enter it again.

Prompt: Text that can be assigned to a variable to help the user better understand how to answer the question.

REPEAT instruction: An instruction that repeatedly asks the same variable(s) so that two or more answers can be entered. REPEAT instructions are used to create lists of answers in a document.

Resource: Supplemental help that can be included with a variable or dialog to help users better understand how to answer the questions they are viewing. Resources appear in the resource pane of the assembly window; in the interview, resources reflect as light bulbs.

Script: One or more instructions and/or expressions that generate a value or execute some kind of procedure.

Span Field: Allows a user to edit the text of a document while viewing the Document Preview tab of the assembly window. Text between the beginning and ending instruction can be highlighted and then selected and edited by the user. Any changes a user makes to the text can be saved to an answer file.

Static text: The underlying text in a form template or document that does not change. To enter answers on a form, form fields must be created and overlaid on the static text.

Template: A word processor or form document that has been converted to HotDocs format so that it can be automated. When in template format, changeable text in the template can be replaced with variables. Other instructions can be added as well, such as instructions that create lists, conditional text, or insert other templates.

Test assemble: The process of assembling a document for the purpose of ensuring the interview works correctly and the automation within the template produces a correctly assembled

document. During a test assembly, developers can easily edit components and have the test assembly window updated with changes.

Text variable: A type of component that merges text in the document.

True/False expression: A script that must result in either true or false. Expressions are used for merging or excluding optional text in a document. They are also used for determining which parts of a script will be executed, based on answers or other values entered by a user. Expressions are often used when a simple True/False variable does not convey the condition needed. (See IF Instruction.)

True/False variable: A type of component that determines a true/false status of some condition and then merges the appropriate answer or text.

Unanswered text: Text in a text document that indicates that a question is unanswered. By default, unanswered questions appear as ***Variable Name***, but this can be customized.

Variable: A component that is used to represent changeable text (such as names, dates, numbers, etc.) in the template. Types of variables include Text, Date, Number, True/False, Multiple Choice, Computation, and Personal Information.

Variable Field: A place in the template that denotes where users' answers should be merged. In a text template, a field is denoted by chevrons. In a form template, a field is denoted by a colored box that is overlaid on the form's static text.

ABOUT HOTDOCS

HotDocs is the recognized global leader in document generation (document automation and assembly) technology, having over 1 million users worldwide—including 80% of the Am Law 200, 20% of the Fortune 500, and enterprises and government agencies of all sizes.

HotDocs has won numerous awards for its excellence in document generation, including The Queen's Award for Enterprise, Law Office Computing Reader's Choice Award for Document Assembly, and the TechnoLawyer Reader's Choice Award for Document Assembly and Automation.

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