IowaDocs®

User Manual

The Iowa State Bar Association
625 East Court Avenue, Des Moines, IA 50309
www.iowadocs.net

Serving the legal profession and the public since 1874

Table Of Contents:

IowaDocs® User Manual   05/09/17

System Requirements:

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

    System Requirements of HotDocs Developer LE 11

    Please visit this link for the requirements: https://www.hotdocs.com/products/hotdocs-developer-11-system-requirements

    **NOTE: Microsoft Word is recommended.

Technical Support:

Technical Support is available to help you install and use IowaDocs® . If you are having difficulties installing or using the software contact us at the following:

Internet	www.iowadocs.net
Email Support	support@iowadocs.net
Support Phone	(866) 597-6040
Subscriptions	844-536-4343
(Through HotDocs Market)	www.hotdocsmarket.com

Support is available from 9:00 A.M. to 3:00 P.M. central standard time, Monday through Friday, if a technician is not available, please leave a detailed message. Please have your HotDocs Market primary account email and password available in case we need to access your HotDocs Market account.

Introduction:

IowaDocs® is a library of templates related to the practice of law in Iowa. These legal forms are created, endorsed and copyrighted by The Iowa State Bar Association. Most IowaDocs® forms are available in two formats, PDF and word-processing (RTF) formats. IowaDocs® does contain state forms that are not to be altered and are not offered in rtf formats. These forms are clearly marked in the IowaDocs® library with "State of Iowa Form" labeled in the description of the forms.

> PDF forms (Form Templates, HPT) graphical-based electronic form file. A form template contains fixed-space fields, represented by lines, boxes and check boxes where answers are placed. The bordered forms operate in the Hotdocs program and cannot be edited. The purpose of the bordered form is to give the parties involved the assurance that the language of the document is standard, eliminating the need to proof read. Text cannot be deleted, but must be stricken through. Additional text can only be added where existing text does not exist. These forms can only be printed on laser printers.

> RTF's (Document Templates) contain the text of the original document plus may include instructional scripts (information) for correctly assembling a customized document. After HotDocs assembles a document, it is placed in the word processor for saving, printing or additional editing.   These forms are identical to the bordered forms in content. The same questions are asked in both formats. RTF forms can be manipulated like any other word-processing file. These forms should be used if editing is needed or if using inkjet printers.

With the purchase of IowaDocs® you actually have several programs. Each is displayed with a separate icon in the HotDocs icon group. (HotDocs, HotDocs Filler, and the IowaDocs® Library)

HotDocs Developer LE is a software tool that significantly reduces the time spent generating customized documents such as contracts, court forms, and legal documents. Using HotDocs, you can transform any word processor file into an interactive template by replacing the changeable text with HotDocs variables. The next time you want to generate that document, just use the HotDocs interactive template you've created. The template prompts you for information and puts the finished document back in your word processor. By adding functionality and power to your word processor, HotDocs helps you generate customized documents accurately and efficiently.

NOTE: ISBA does not support training in creation of you own automated templates.

HotDocs Filler a program that allows you to fill graphics-based HotDocs forms (PDF Forms). It is used to open previously saved IowaDocs® PDF type documents. Once a template is opened and completed it is detached from the IowaDocs® program and saved as a HotDocs form with the file extension HPD (HotDocs PDF Document). HPD files are not recognized by IowaDocs® or any word processing program and must be opened through the HotDocs Filler program.

Launching IowaDocs®:

Display the Library

- To display the IowaDocs® Library: Choose **HotDocs 11** at the **Start/Programs menu**. The IowaDocs® library window should appear. If it doesn't appear, then click on the File menu and select "PUBIOWADOCS" from the listing.
- Below is a sample of the IowaDocs® library navigation screen:
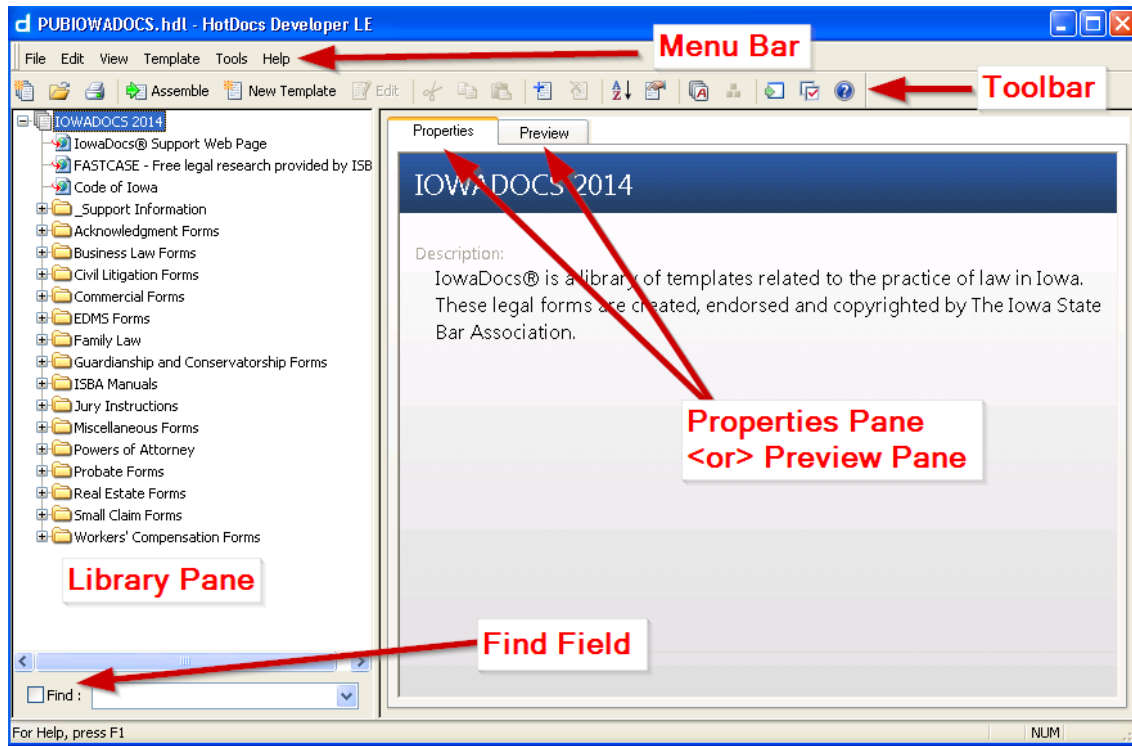

Figure 1

Opening or Closing a Folder

- Open folders are represented by this icon.
- Closed folders are represented by this icon . When a folder is open, you can see the files and subfolders that are in it.
- To open or close a folder, Double-click the folder icon.

Finding a Form

You can use the "Find" feature in order to find a form in the library. Most forms have a title with the form number, which can be used to find forms. Some forms have specific descriptions (HIPAA and state forms) which the "Find" feature can use to look for a form.

- To use the find feature, have the IowaDocs® Library window open (see Figure 1 on page 6).
- At the bottom left locate the Find dialog box, type in your search text (i.e. 102 or deed)
- A list will be produced with forms that have that criteria. (i.e. looking for 102 will produce the RTF and PDF of form 102-Warranty Deed)
- During this search, the checkbox will be checked. To go back to the library window, uncheck this box.

Printing a Form

- To print an IowaDocs® PDF form, simply right-click on the form you would like to print and select the option "Print Template". This will result in the printing of only that form, not the whole listing of the library. Caution: some forms have variables defaulted to add additional pages or activate other options on forms, printing a form directly may affect the final output of the form

Printing a List of Forms

- To print a listing of all the current forms go to http://www.iowadocs.net and click on List of Forms.

Assembling an IowaDocs® Form:

To start HotDocs/ IowaDocs®
Choose **HotDocs 11** at the **Start/Programs** menu. The IowaDocs® library window appears.

To start HotDocs, you can also click the **HotDocs** button (d) in any word processor toolbar. This will open and display the IowaDocs® library window.
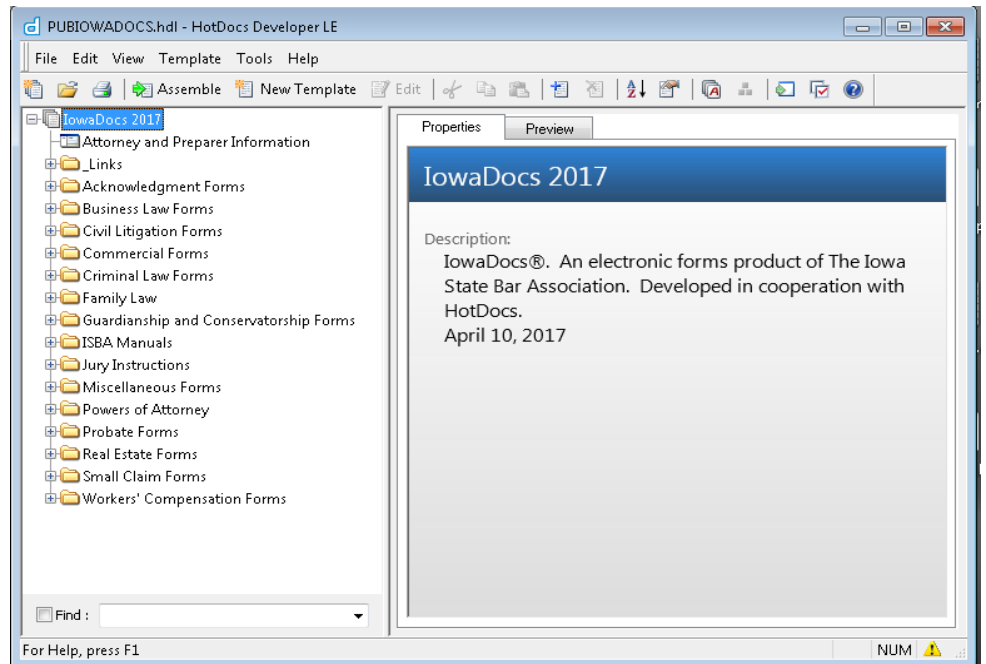
Assemble or Fill a Form
You assemble a document by selecting a template and then providing the required variable information.

To Assemble/Fill a document

1. At the HotDocs library window, select a template.
2. Click **Assemble**. The **Answer File** dialog box appears.
3. Select the type of answer file needed, then click **OK**.
4. If this is a new answer file then it is recommended that you save your answer file. Go to File/Save Answers or click on the 💾 Save Answers icon in the toolbar. (for more information on answer files please visit the answer file section of this manual). Once named you can use the keyboard shortcut of Ctrl + S to manually save your current answer file.
5. Answer the dialog questions in the "Interview Tab", then click **Next** to advance to each new dialog.

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. Please see "End of Interview Options" section for a discussion on options available to you.

NOTE: Image on next page outlines the "assembley screen".

Navigation of IowaDocs® Assembly Screen

IowaDocs® User Manual   05/09/17
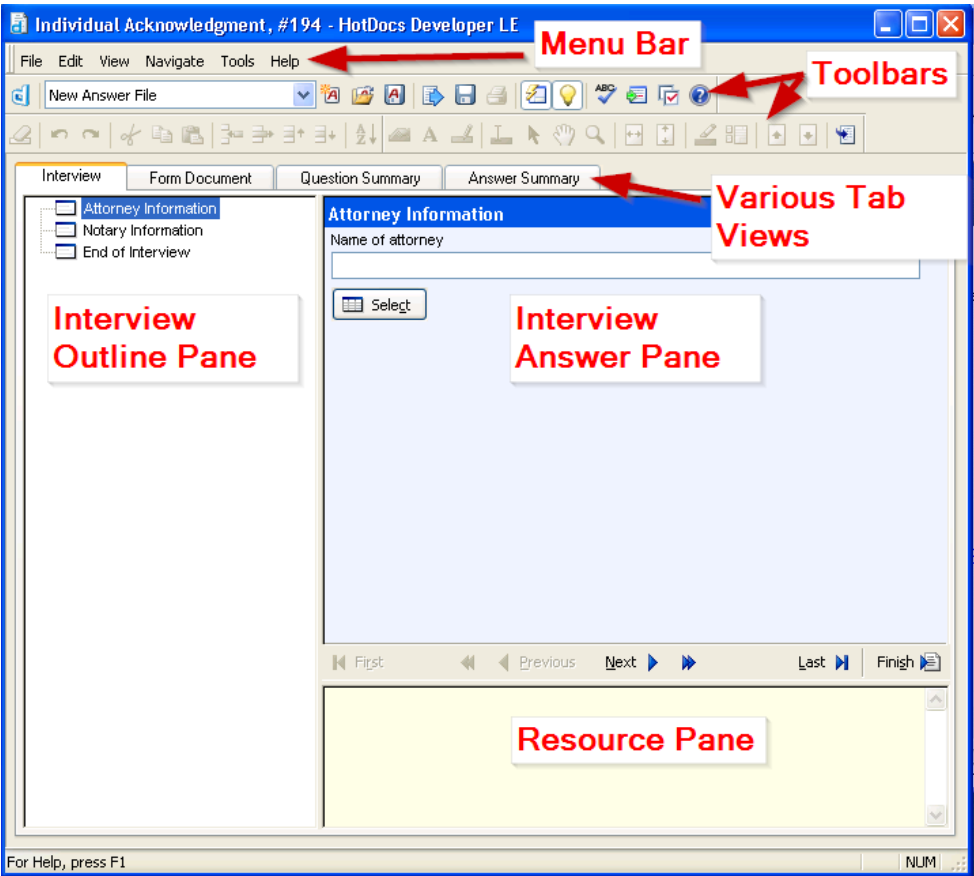
Filling a Form Directly

To fill a form directly (<u>not recommended</u>, cannot directly fill a word-processing (RTF) type form)
1. At the HotDocs library window, select a form template and begin assembling the document.
2. If it's not selected automatically, click the Document tab. The assembly window changes to show the document, and the variable fields.
3. Select a field, then type an answer. Note: some fields need to be overwritten as they are combination fields (need more than one answer from the interview) in order for a direct fill.

Press Tab to move to the next field, or use the mouse to select another field.

*Tip
Some fields have a field wizard—a series of one or more dialogs to help you answer the field when you are filling the form directly. If a field has a wizard, a wizard button will appear next to the field when its fill control is displayed. Click the button to see the wizard.

If the template author has provided help for a field, a help button may appear next to the field when its fill control is displayed. (The help button will only appear if the author has enabled it in the template and if the Show Help Buttons check box is selected in Preferences. For details, click here.) If there is help for the field, you can display it even if the button doesn't appear by clicking the What's This button in the toolbar and clicking the field.

Assembling and Filling Multiple Documents and Forms

You can assemble and fill multiple forms at once by selecting multiple templates. One document or form will be produced from each selected template. The Assembly Options dialog box will appear only once, and all the templates and clause libraries will use the same answer file.

To assemble and fill multiple documents and forms
1. Display the HotDocs library window.
2. Select each template you want to use. (To select multiple items, hold down the Ctrl key as you click each one.)
3. Click **Assemble**.
4. If you want to use an existing answer file, specify it at the Current Answer File box. (For details, click here.)
5. Click **OK**.

NOTE: If you would like to assemble documents in a certain order then you should do the following steps-

1. Start assembling the first template.
2. Click on the to go back to the IowaDocs® library.
3. Double-click on the other forms you would like to assemble in the order you would like to assemble them. Remembering each time to click on the . (you should now see the Assembly Queue window. This shows what forms are "assembling" and forms that are "confirmed".)
4. To go back to the first form – double click on the form in the Assembly Queue. When you close/finish with this form the next form will start automatically, with the answer file you used for the other document.

*Tip
If you have selected only document templates, you will be asked about saving answers when the last document is done assembling. If you have one or more form templates selected, you won't be asked about saving answers until the last form is saved or closed. However, when you save a form, it is no longer connected to the answer file, even though other forms may be.

Finished Documents or Forms

PDF based Forms

Until saved or closed the PDF forms are connected to the template and answer file. Changes made to the form before being saved are also made in the answer file (Figure 1). Once saved, changes to the form are not changed in the answer file (Figure 2). The file extension .HPD is attached to all saved forms. These saved forms will not be recognized by IowaDocs®, so to reopen these forms you must access them thru the HotDocs Filler program.

Figure 1   Figure 2

RTF Documents

Once IowaDocs® displays an assembled RTF document in your default word processor, the document is a normal word processing document. You can manipulate this document just like any other word processing document. You may change your answer or standard document text. Any changes made will not be saved in the answer file.

Once finished with a RTF document it can be:
Saved
Printed
Answer File Saved

Saving a PDF based Form

When you save a form, HotDocs closes the current answer file. (You will be asked if you want to save the answers first.) Any changes you make to the answers in the form once the form has been saved will not be saved in an answer file.

You will be able to save your documents as and HPD (HotDocs PDF Document) or as a PDF (portable document format).

NOTE: A HPD file is editable, using HotDocs Filler, but the PDF format will not be editable. A PDF format is convenient for sharing with others that do not have HotDocs, such as clients.

1. Go to the File menu, click Save Document As.
2. Go to the "Save Type as" field and select HPD or PDF (For security options, see " HotDocs PDF Advantage').
3. Name your file.
4. Navigate to the directory you would like to save to and click on Save.

*Tip
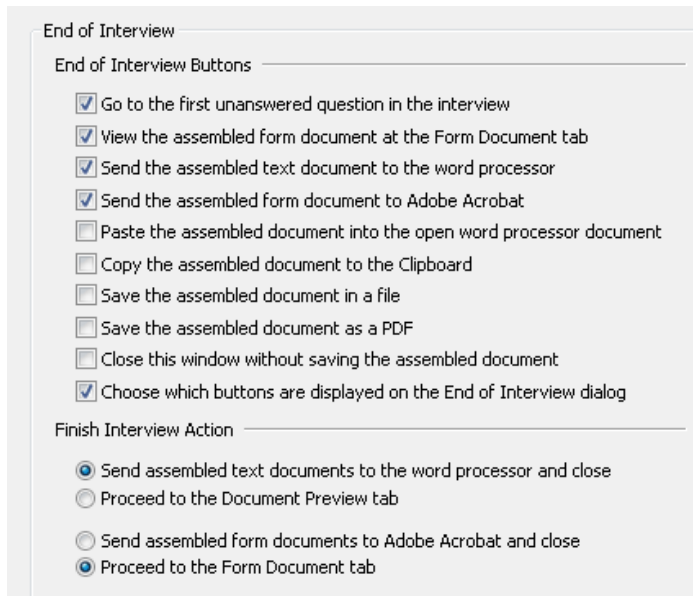A saved PDF based form has the file name extension .HPD. It also is not connected to the answer file.

Printing a Form

Printing a PDF-based form in HotDocs follow these steps.

1. Click on the **Form Document Tab** located at the top or bottom of the Assembly window.
2. On the **File menu**, click **Print**. (select Acrobat or HotDocs driver if given the option)
3. Print window will appear, make sure proper printer and options needed are selected.
4. Click **OK**.

- To print a Question Summary: Click Question Summary Tab then select Print
  (if you do not see the Question Summary Tab then go to View Menu and check Question Summary Tab – more information about this tab on next page)
- To print an Answer Summary: Click Answer Summary Tab then select Print
  (if you do not see the Answer Summary Tab then go to View Menu and check Answer Summary Tab – more information about this tab on next page)

End of Interview Options

The "End of Interview" screen is now customizable. As a default you only have one option selected for you. The option is "View the assembled form document at the Form Document tab…". This option will open the "Form Document" tab for you. Below is a list of options you can select to have shown at this screen each time you assemble a document. Click on the options button to view all the options available.


By default the first 4 options and last are selected. The other 2 most people might want to have select are: "Save the assembled document in a file" and "Save the assembled document as a PDF".

Notice that you do not have the option of sending the document to Filler. In order to do this select the "Send document to HotDocs Filler" tool in the tool menu (   ) or select the F11 key on your keyboard.

Tab Options for Assembling Forms

When you are assembling a form, by default, only the Interview and Form Document (or Document Preview) are visible tabs. However there are two others that can be displayed: (These tabs are useful especially if you have forms dictated or filled out by a client because they follow the actual interview that a user fills out.)

Question Summary Tab. This tab allows you to view/print all questions that the interview will ask. It will give the question and a line for an answer. For those that use dictation of forms, this is an option to explore.

- To view this tab when you assemble a form, open up a form and at the Interview Tab go to View and select Question Summary Tab. This tab will always be visible.

Answer Summary Tab. This tab is the same as the Question Summary except it will display any answers you have filled out already. If an answer wasn't given then it will insert a blank line.

- To view this tab when you assemble a form, open up a form and at the Interview Tab go to View and select Question Summary Tab. This tab will always be visible.

HotDocs PDF Options

HotDocs allows you to save templates as PDF's (Portable Document Format) and share with anyone electronically. You have the ability to save documents as a secure PDF. Secure PDF's can have passwords, disallow content copy or printing, and other security options are available.

In IowaDocs® during the interview: (Save As Option)

1. At the "**End of Interview**" or "Form Document" tab go to **File/Save Document As**.
2. Select "**Save As Type**" option "**PDF File (*.pdf)**" and give your file a File Name.
3. To protect the document, select the "**Security…**" button. If you do not select the security button then your PDF file can be easily copied or changed. Below is a screenshot of the security options available:
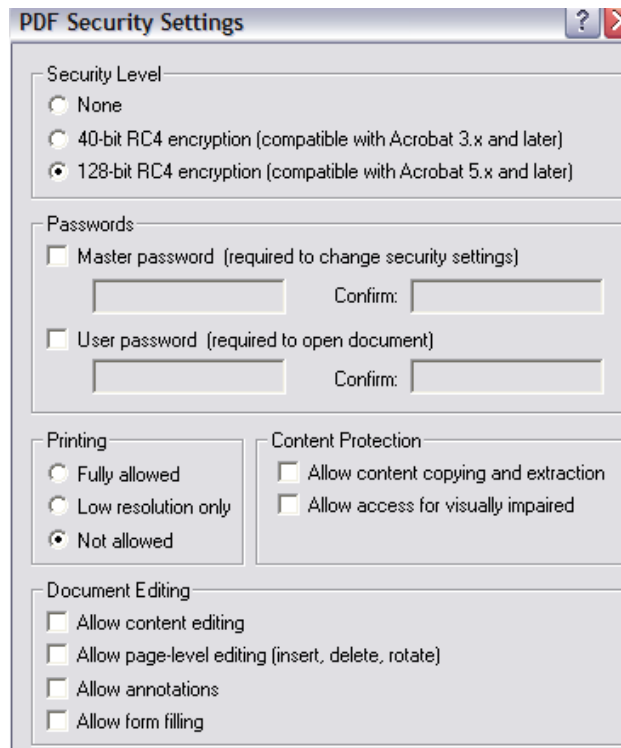
In HotDocs Filler: (Save As Option)

1. Go to **File/Save Document As**.
2. Select "**Save As Type**" option "**PDF File (*.pdf)**" and give your file a File Name.
3. To protect the document, select the "**Security…**" button. If you do not select the security button then your PDF file can be easily copied or changed. Below is a screenshot of the security options available:

IowaDocs® User Manual   05/09/17

About Answer Files

When you assemble a document, you can save the information you entered for the document (the "answers") in a HotDocs answer file. The answer file stores each answer along with the name of the variable that uses that answer. The answer file can be used again later to produce the same document or form without re-entering the answers to the interview questions. You can also use the answer file to assemble documents from other templates that use the same variables.

The best way to organize your answer files depends largely on your type of practice. Some users create one answer file per client. Others create one answer file per matter. (This method is especially good when you have multiple matters per client that use the same forms, because it prevents the answers from the current matter from overwriting the answers from a different matter and the answers from a previous matter from getting used accidentally in the current matter.) Still other users combine the two methods, creating a pattern answer file for each client that contains basic client information, and then using the pattern file to copy the answers into a new file every time they start a new matter for the client.

Answer files have the filename extension .ANX (or .ANS) and are stored by default in the default answer file directory. You can specify a different directory when you create an answer file.

NOTE: All 3 of the above forms are using the same answer file.

Using an Existing Answer File

You can use an existing answer file to assemble a template. You can save any changes you make to the answers in the file, or you can use the answer file but not save your changes.

To use an existing answer file

1. Open the template you would like to use.
2. At the Answer File dialog box, click on the Select Answer File button ( ).
3. Find the Answer File you want to use. Click on Open
4. Assemble the template.

*Tip
To reopen the last answer file you used, click on the drop down menu to select the previous answer files you have used.

You can select an answer file so that it can be used for all documents you assemble and forms you fill until you select another answer file. Check the "Remember Selected Answer File" box.

Save an Answer File During Assembly (Recommended)

You can save an answer file while you are assembling a template.

To save an answer file during assembly

1. Go to the **File menu** and select **Save Answers As**… (use Save Answers if you have already saved the answers once before)
2. Give your answer file a file name (i.e. client name)
3. Hit your tab key – this will take you to the Title field – this will automatically put in your file name for you.
4. Click on **OK**

If you are using a new answer file, HotDocs opens an empty, untitled answer file. Give the answer file a name. If you are using an existing answer file, HotDocs saves the answers you have entered to that file.

About the Answer File Manager

The answer file manager helps you manage your answer files, much like a HotDocs library helps you manage your templates and clause libraries. The answer file manager is a list of answer file titles. Each title is associated with an answer file filename. When you select an answer file and click Select, HotDocs uses the associated file.

Each copy of HotDocs can have only one answer file manager. If you want to separate your answer files, you can create folders in the answer file manager window.

*Tip
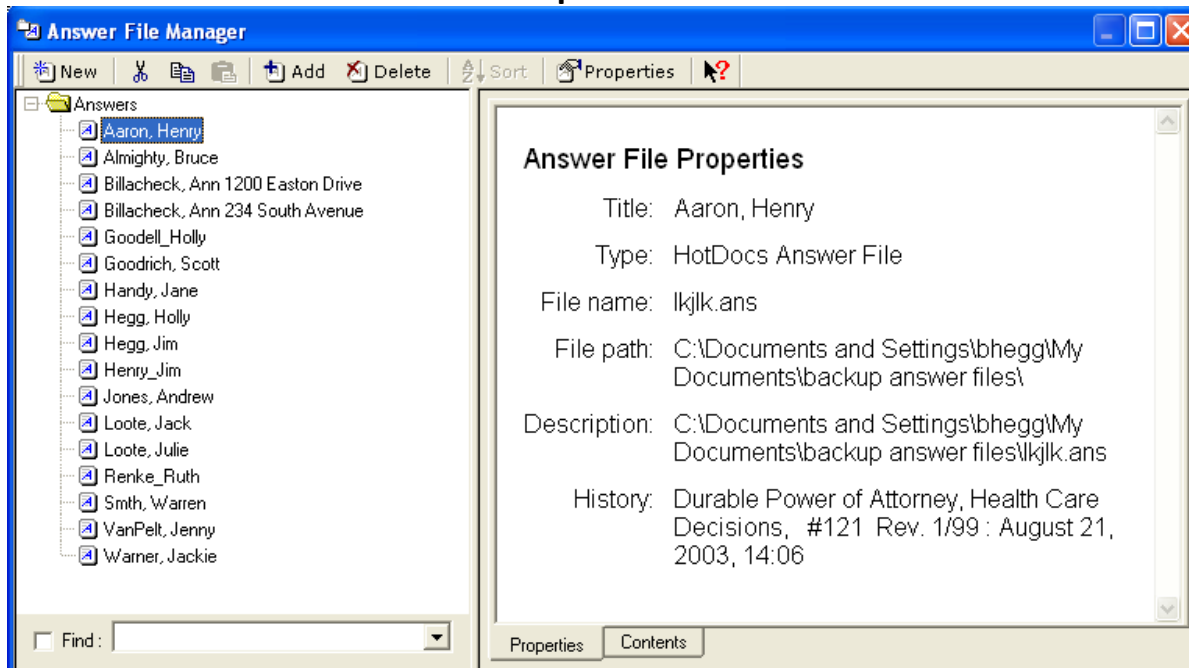Answer File Manager is disabled if you use windows explorer to save answers.
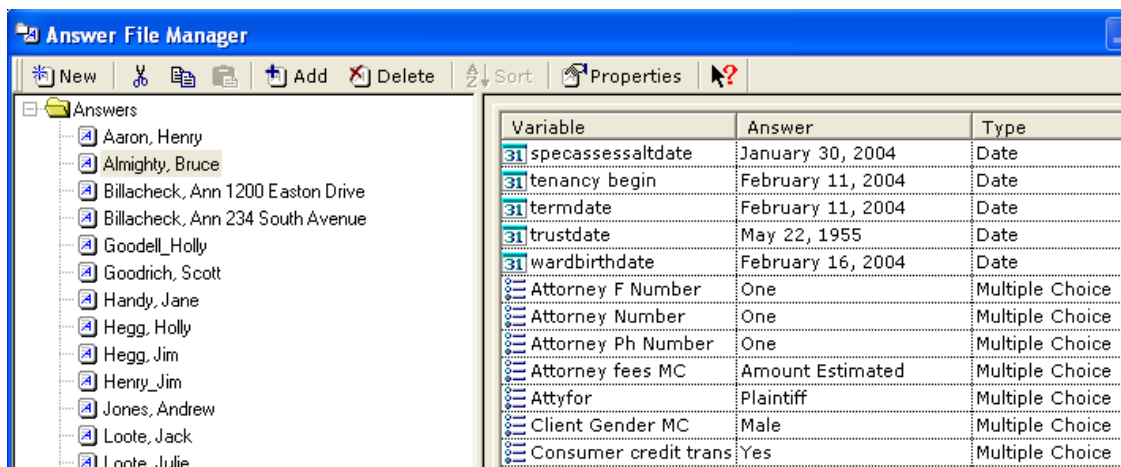
Displaying the Answer Library

To display the answer library:

1. At the IowaDocs® library window, click Tools.

2. Select Answer File Manager ().

Properties Pane View

Contents Pane View

IowaDocs® User Manual   05/09/17

<u>Finding an Answer File</u>

You can quickly find a certain answer file in the library by searching for words in the answer file's title or description.

To find an answer file

- ▪ Select the Find check box and type words from the answer file's title or notes in the text box.

Customizing IowaDocs®

Adding Text to a bordered form
NOTE: Same process for HotDocs Filler.
1. Open Form to be filled.
2. Assemble form.
3. Go to the Document Tab to view the actual document and make sure the select tool ( ) is selected
4. Draw field where text is to be inserted. (Simply left click and drag.) Remember text can only be added where no text exists.
5. Now click on the fill tool ( ) and enter the text you need.

Override a Field on a bordered form
You can 'override' any field on a document. Doing so will not save this information on the answer file so it is recommended that the field is not filled in before overriding.

1. Click on the "Form Document" tab.
2. Navigate to the field to change.
3. Click inside the field.
4. Select "Override Field" from the "Fields" menu option.
5. Click OK.
6. Type in the text you would like to appear.

To size and position field
NOTE: Same process for HotDocs Filler.
1. Select field to be moved or resized.
2. Once selected right click on mouse. (Menu option will appear)
3. Select resize/move
4. Handles or small boxes will appear on field. (These handles are used to move and resize.)
5. The handle in upper left corner of the field is used to move a field.
6. Selecting any other handle will resize the field.

Striking Out Text
NOTE: Same process for HotDocs Filler.
1. Open Form to be filled.
2. Assemble form.
3. Go to the Document Tab to view the actual document and make sure the Select Tool ( ) is selected
4. Position field over text to be stricken (create the field a little larger than needed).
5. Go to the Field menu and select Properties.
6. In the Properties window check "Strike-Through"(lower right corner).
7. Select the fill tool ( ), click inside the field type an "X" or a "-".
8. Click outside the field. Your field will be inputted with the above type.

NOTE: If you use HotDocs Filler then the tool is called "Select Fields" and not "Select Tool".

*Tip
To get multiple lines to be stricken – give a hard return (type the Enter Key) for one less then the number of lines you need (i.e. If you need 4 lines to be stricken you need 3 hard returns, do this: type an x, **hit enter key**, type x, **hit enter key**, x, **hit enter key**, type x)
Properties, such as bold, italic, etc. can be changed under the Field/Properties.

Enlarging and Reducing the Form View

By default, forms in HotDocs Automator display at their actual size.

To enlarge or reduce the form view

       View Page Width or view full page

Change Your Default Word Processor

If you have more than one word processor installed, you can select a default word processor to which you send an assembled document after you complete a HotDocs interview. This word processor will always be used, no matter which format the template is in when you select it for assembly. (For example, if you select a Word template but want the assembled document to be saved as a WordPerfect file, you can select WordPerfect as the default word processor and HotDocs will convert the assembled Word document to WordPerfect format.) Note, however, that if you save a document to disk (by clicking the Save Document button) without sending it to the word processor first, it will be saved in the same format as the original template file.

To specify a default word processor
1. At the HotDocs library, click the Tools menu then click on the Options button. The HotDocs Options dialog box appears.
2. Click the Word Processors folder. The right pane changes to show a drop-down list of available word processors.
3. Click the Default Word Processor drop-down button and select a word processor.

Showing or Hiding Field Backgrounds

You can show or hide the field backgrounds in forms. By default, field backgrounds are visible.

To show or hide field backgrounds

Select the **Form Document tab**, go to **View** and select **Show Answer Fields**. Select again to turn back on

On the **View** menu in **Filler**, click **Fields**.

*Tip

You can also show or hide fields by clicking the View Fields button on the toolbar.

To open a saved PDF-based (HPD) form

1. Start HotDocs Filler if it is not already open.
2. On the File menu, click Open.
3. Select the file you want to open and click OK or Open.

If the form was saved as a PDF you can open this form using Adobe Acrobat Reader. Please refer to page 11 "Saving a Form" for more information on the difference of a HPD and PDF file.

Keyboard Shortcuts

Open	Ctrl+O
Close	Ctrl+F4
Save	Ctrl+S
Exit	Alt+F4
Undo	Ctrl+Z
Redo	Ctrl+Y
Cut	Ctrl+X or Shift+Delete
Copy	Ctrl+C or Ctrl+Insert
Paste	Ctrl+V or Shift + Insert
Delete	Del
Select All	Ctrl+A
Previous Page	Alt+PgUp
Next Page	Alt+PgDn
Go To Page	Ctrl+G
Fit Page to Width	Ctrl+H
Zoom In	F10
Zoom Out	F9

Keystrokes for Symbols (most common)

Description	Character	ASCII
Degree sign	°	ALT 0176
Section sign	§	ALT 0167
round filled bullet	•	ALT 0149
copyright sign	©	ALT 0169
registered trademark sign	®	ALT 0174
trademark sign	™	ALT 0153
one half sign	½	ALT 171
one quarter sign	¼	ALT 172
three quarter sign	¾	ALT 0190
cent sign	¢	ALT 0162
en dash	–	ALT 0150
em dash	—	ALT 0151
per thousand (mille) sign	‰	ALT 0137