IowaDocs Procedure for Refreshing Library - Desktop Users

Below are the instructions on updating IowaDocs® Library contents for the Desktop.
There are two parts to this process:

- Part 1: Removing IowaDocs library contents.
- Part 2: Downloading the current update file from HotDocs Market and installing it.

If you have individual libraries, each computer will need to follow all of these steps, unless you share the file downloaded in Part 2 with other users, they can skip the downloading steps (#10-#12).

If you have a network install be sure all users are completely out of IowaDocs/HotDocs before you continue with the steps below.

The reason this may be necessary is that HotDocs can add or amend templates but cannot remove/delete templates.

Part 1: Removing IowaDocs® contents

1. Open your current IowaDocs library
2. If needed, collapse all your folders by clicking on the "View" menu and select "Collapse All". (see "Figure 1")
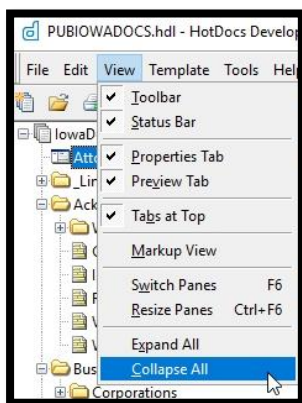

Figure 1

3. Click on the first item in the library *(for most that will be "Attorney and Preparer Information")*. (see "Figure 2")
4. Hold the "Shift" key on your keyboard down, and click on the last item listed *(for most that will be the folder entitled "Workers Compensation Forms")*. (see "Figure 2")
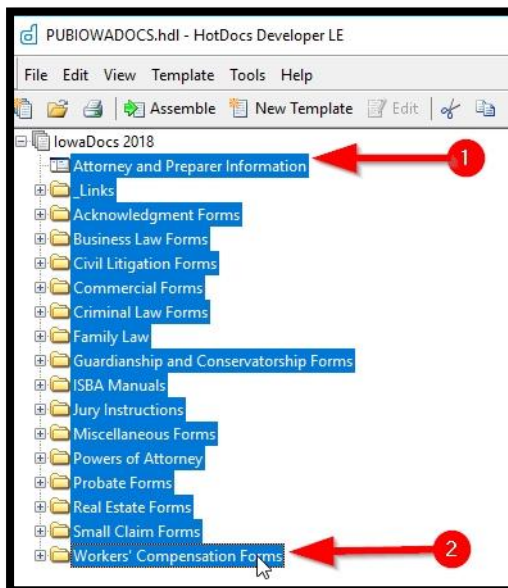

Figure 2

---

5.   Click on the "Edit" menu and select "Remove Item" from that menu. ==(see "Figure 3")==
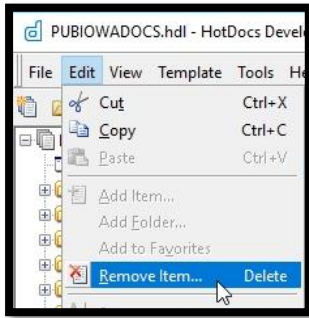

Figure 3

6.   At the "Remove Items" dialog window click on the first check-box entitled "Remove the <###> unselected items contained in selected folders".   **Do not check** the second box entitled "Permanently delete the files for selected items from the disk". ==(see "Figure 4")==
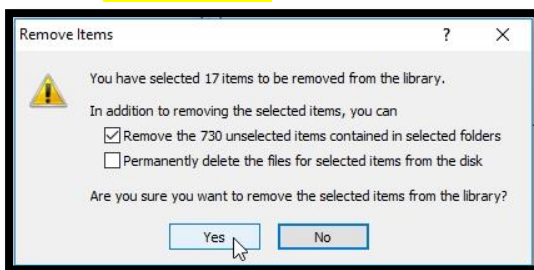
7.   Click on "Yes". ==(see "Figure 4")==

Figure 4

9.   This will clear your library.   Part 1 is completed, continue to Part 2, step 10 below.

Part 2: Downloading the current update file from HotDocs Market

10. Open your web browser and visit www.hotdocsmarket.com and sign in with your primary account holder. (see "Figure 5")

Figure 5

11. Go to "My Subscriptions" click on the word "IowaDocs" listed under your subscriptions. (see "Figure 6")

Figure 6

12. *Click on "Download HDI" to the right of the library listing. If asked to save or open - you may select either, but it is recommended that you select "Save". (see "Figure 7")*
   (By default, this file will download to your "Downloads" folder so you may need to visit that location to run this file once it has completed downloading)

Figure 7

13. Once it has downloaded, open the file to run it.
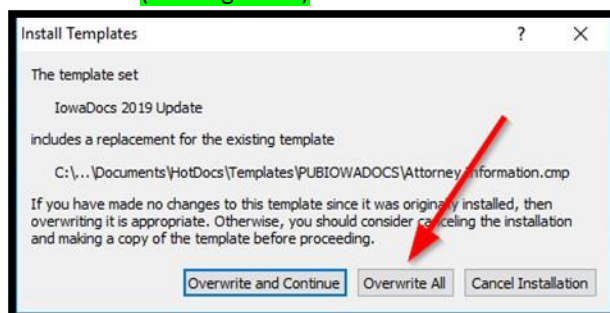14. Select "Overwrite All". (see "Figure 8")

Figure 8

15. Click "OK".

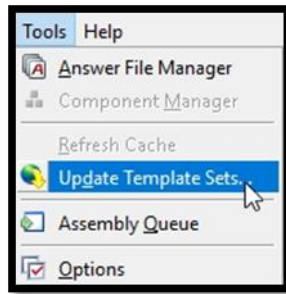16. Click on the "Tools" menu and select "Update Template Sets". <mark>(see "Figure 9")</mark>

Figure 9

17. Click "OK".
18. *Put a check in the "Discard" box and click the "Continue" button.* <mark>(see "Figure 10")</mark>
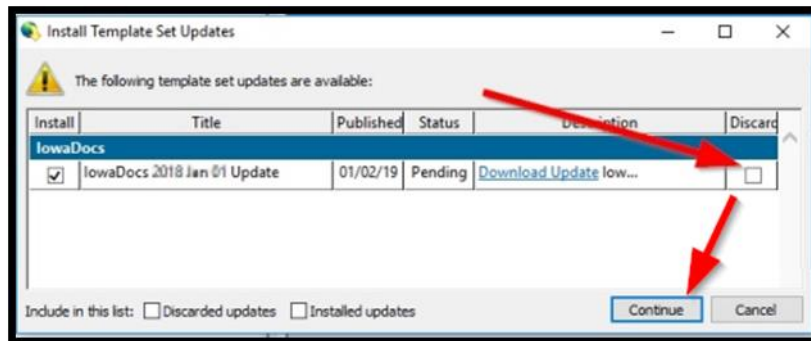   *(If you have more than one entry here, put a check in each of the "Discard" boxes)*

Figure 10

19. Congratulations, you are now updated to the most current version of IowaDocs®.
20.