HotDocs 3.0 Readme File *4/22/96*

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(The readme file contains corrections to *Learning HotDocs* and information not included in the *HotDocs User's Guide*.)

Contents

Corrections to Learning HotDocs
Replace the section "Creating Sublists" in Chapter 9, "Using Repeats," with the instructions below. You should use the Filter feature, instead of If instructions inside Repeat instructions, to create sublists. (Format examples do not work with Repeat instructions that contain If instructions.)

To merge in a list of only the new contracts for mystery novels
    1   Select **<<Author>> (<<Tentative Title>>)** in the last paragraph. Do not select the period.
    2   Click the HotDocs **Repeat** button.
        The Repeat dialog box appears.
    3   Select **Novel Information** from the Repeated Dialog drop-down list, and select **a, b, and c** from the Format Example drop-down list.
    4   Click **Filter**.
        The Computation Variable dialog box appears.
    5   Enter **Mystery** in the Variable Name box.
    6   Drag the **MULT_CHOICE = TEXT** model into the Computation box.
    7   Drag **Genre of Novel** on to the MULT_CHOICE placeholder.
    8   Drag the **Enter some Text** model on to the TEXT placeholder.
        The Enter some Text dialog box appears.

9   Type **Mystery** and click **OK**.
10   Click **OK** to return to the Repeat dialog box and then click **OK** again.
     The Repeat instruction appears around the selected text.

You can now test the template to make sure only the mystery novels are merged into the document.

When you are finished testing, close the test document to return to the template and click the HotDocs **Close** button to save and close the template.

Adding the HotDocs Button to a Button Bar in WordPerfect 5.2, 6.0, or 6.1
To add the HotDocs button to the current button bar in any version of WordPerfect, open WordPerfect and run the macro HDINSTAL.WCM. (This procedure is an alternative to the one described in the manual. The procedure in the manual will display the HotDocs button with the default button bar.)

Default Dialog Titles
By default, HotDocs will use the template's default title as the title for default dialogs. (See "Default Title and Description for a Template," below.) If the template does not have a default title, the title for default dialogs will be "Default Dialog." You can change the default dialog title at the Component File Preferences dialog box, and you can also specify that the default title be used for all dialogs, even custom dialogs.

Default Title and Description for a Template
When you create a template, the title and description you enter at the Create Template dialog box will become the default title and description and will be stored in the template's component file. The default title and description can be edited at the Component File Preferences dialog box. When you add the template to a library, you can have HotDocs use the default title and description, or you can enter a different title and description. The default title will also be used as the title for default dialogs. (See "Default Dialog Titles," above.)

To use the default title and description
     1   At the Library Entry dialog box, enter the filename for the template in the Filename box.
     2   Click **Get Title**.
     3   Click **OK**.

Document Manager Integration
In addition to the procedures specified in Appendix E of the *User's Guide* for using HotDocs with document managers, in order for HotDocs answer files to be saved using DOCS Open or SoftSolutions, the file ODMA.DLL must be copied into the WINDOWS\SYSTEM directory.

Filtering Repeat Entries
You can filter Repeat entries

To filter Repeat entries
     1   Open the Repeat dialog box for the Repeat whose entries you want to filter.
     2   Click **Filter**.
          The Computation Variable dialog box appears.
     3   Enter a name for the variable in the Variable Name box.
     4   In the Computation box, enter the condition that must be true for an entry to be included (for example, Age >=18 when *Age* is a Number variable).
     5   Click **OK** to return to the Repeat dialog.
     6   Make sure any information you use in the condition (in this case, the age) is asked in the repeating dialog.
          When the Repeat instruction is processed, only those entries meeting the filter condition will be

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included.

To filter Repeat entries when the Repeat instruction is in a Computation variable
    1   Create a Computation variable containing the condition that must be true for an entry to be included (for example, Age >=18 where *Age* is a Number variable).
    2   Create a dialog that asks the information you want to gather for each repeat entry. Make sure you ask for the information you used in the Computation variable (in this case, the age).
    3   Create a second Computation variable containing the Repeat instruction, including the text or instructions to be repeated and the END REPEAT keywords.
    4   On the line below the REPEAT Dialog statement (but before the text or instructions to be repeated), type **FILTER** (it must be in all capitals) followed by the name of the Computation variable you created in step 1. (For example, FILTER Age Computation).
    5   Insert the second Computation variable in the template.
        When the Repeat instruction is processed, only those entries meeting the filter condition will be included.

Grouping Inserted Dialogs
You can group dialogs inserted in other dialog and specify that only one dialog can be selected (answered) at a time. Any True/False variables in the main dialog will also be marked Select One. Inserted dialogs and True/False variables can be grouped together.

Dialogs and True/False variables marked Select One will appear as option buttons. When the user clicks an option button, all the other option buttons will be cleared. If the selected button corresponds to an inserted dialog, that dialog will appear. If any answers are typed in the inserted dialog, its option button will still be selected when the user returns to the main dialog. If another option button is selected, the first option button is deselected, but the first dialog retains its answers. When the user clicks OK at the main dialog, the answers to the currently selected dialog will be kept, and the answers to any other inserted dialogs will be deleted.

To group inserted dialogs and mark them as Select One
    1   Open the Dialog Builder and display the dialog that has the other dialogs inserted in it.
    2   Click **Style**.
        The Dialog Style dialog box appears.
    3   Select **Select One** under True/False Grouping.
    4   Click **OK** to return to the Dialog Builder.

HotDocs 2.0 Files
When a component file created in HotDocs 2.0 is edited by editing the associated template, the component file is automatically converted to 3.0 format and can no longer be used with HotDocs 2.0. Similarly when an answer file created in HotDocs 2.0 is used and saved in HotDocs 3.0 it can no longer be used with HotDocs 2.0.

If you want to keep a copy of a template or an answer file for use with HotDocs 2.0, make a copy before editing the template file or using the answer file in 3.0.

If Instructions in Repeats
An If instruction should not be used inside a Repeat instruction with automatic punctuation formatting. Automatic punctuation will be inserted for every repetition, even though the If instruction may prevent text from being merged. Extra punctuation marks may be inserted in the text.

If Instructions in Table Cells
You cannot put If instructions inside table cells. If you need to make the variable in a table cell conditional,

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insert the If instruction inside a Computation variable and then put the Computation variable inside the table cell.

Insert Instructions
A subtemplate inserted with an Insert instruction must be in the same directory as the main template.

Installing a Template Set
You can install a template set from the HotDocs window.

To install a template set
1   At the HotDocs window, click the **Library** button and choose **Install**.
The Open dialog box appears.
2   Select the template set file you want to install and click **OK**. (Template set files have the extension HDI.)
3   If you have not previously installed a template set from the same publisher, a dialog box appears where you can specify a drive and directory path.
4   If HotDocs finds a template with the same name and in the same directory as one you are installing, the Overwrite Checking dialog box will appear where you can choose to replace or copy the existing template.
When the template set is installed, the library containing the templates will be opened automatically in the HotDocs library window.

Naming Variables
You can use a backslash (\) in a variable name. You can also use an exclamation point (!) in a variable name without having a character other than a space immediately to its right or left. However, you cannot use !=, <=, or >= in a variable name unless they have a character other than a space immediately to their right or left.

Punctuating Repeat Entries in a Computation Variable
The FORMAT instruction allows you to automatically punctuate a list created by a Repeat instruction in a Computation variable. Before, you could only use automatic punctuation when a Repeat instruction was inserted directly in a template.

To punctuate a list in a Computation variable
    1   Create a Computation variable containing the Repeat instruction, including the text or instructions to be repeated and the END REPEAT keywords.
    2   On the line following the REPEAT Dialog statement (but before the text or instructions to be repeated and before any sort or filter instructions), type **FORMAT** (it must be in all capitals) followed by a format example inside quotation marks. (For example, FORMAT "a, b, and c".)

RESULT
When you use the keyword RESULT in a computation, you must first set the computation to a value. If the computation will return text, set it to a value by typing text inside quotation marks ("") at the very beginning of the script in the Computation box. (To set a text computation to nothing, type empty quotation marks. There can be nothing between the quotation marks--not even a space.) If the computation will return a number, set it to a value by typing a number at the very beginning of the script. (To set a number computation to nothing, type zero (0).)

Sample Templates
A library of sample templates, SAMPLES.HDL, is included with HotDocs 3.0. Since using these templates may have legal implications varying by state, you should receive competent legal advice before using them or adapting them for your business.

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The sample templates library is contained in the HOTDOCS directory. To open the library at the HotDocs window, click Library, choose Open, and select SAMPLES.HDL.

Saving Libraries
You can save a library without closing it by clicking Library at the HotDocs window and choosing Save.

Show Assembly Option
For WordPerfect users, the Show Assembly option is functional only during a test assembly, not during normal document assembly.

Sorting Repeat Entries in a Computation Variable
The ASCEND and DESCEND keywords allow you to sort Repeat entries when the Repeat instruction is inside a Computation variable. Before, you could only sort Repeat entries when the Repeat instruction was inserted directly in the template.

To sort Repeat entries in a Computation variable
    1   Create a Computation variable containing the Repeat instruction, including the text or instructions to be repeated and the END REPEAT keywords.
    2   On the line following the REPEAT Dialog statement (but before the text or instructions to be repeated), type **ASCEND** or **DESCEND** (it must be in all capitals) followed by the name of the repeated variable you want to sort on. (For example, ASCEND Name.)
        When the Repeat instruction is processed, the entries will be listed in the order specified.

For example
""
REPEAT Employee Information
ASCEND Last Name
RESULT + "<<Last Name>>, <<First Name>>
"
END REPEAT

Text Patterns

To insert the following characters in your patterns as characters and not codes, enter a forward slash (/) and then the character.

To Insert	Enter
X	/X
9	/9
A	/A
U	/U
L	/L
N	/N
H	/H
/	//

Titles for Library Entries
Titles for library entries can only be 100 characters long.

TypeHere Bookmark
The Move to the "TypeHere" Bookmark after Assembly option at the Component File Preferences dialog box does not work in WordPerfect.

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Uninstalling HotDocs
To remove HotDocs from your computer, place the HotDocs installation Disk 1 in drive A: (or B:), choose Run from the Program Manager File menu, type A:\UNINSTAL.EXE, and press Enter. The uninstall utility will delete all files installed by HotDocs. It will not delete any template or component files you have created. And it will not delete the HotDocs directory, the HotDocs program icon, or HotDocs program group: these must be deleted manually.

Variables inside Text in Computations
You can now merge in variables inside text in computations. Before version 3.0a, the name of the variable would be merged instead of the value returned by the variable. To return the value and not the name, the variable must be inside chevrons. To insert chevrons, type double angle brackets (<< >>). The brackets will be converted to chevrons automatically.

WordPerfect File Dialogs
The Use WordPerfect File Dialogs option in HotDocs Setup is no longer functional.

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