HotDocs *Document Automation*

HotDocs is an award-winning document automation system, used widely throughout the world. It greatly reduces the time spent creating documents in any workplace and is used in many professions including the legal profession, medical and insurance areas, and government departments. From general daily correspondence or a fax coversheet through to the most complex legal document, HotDocs increases the accuracy and efficiency of document generation.

HotDocs is fully integrated with the 2 most common Windows word processing packages - Microsoft® Word and Corel® WordPerfect. Using HotDocs, you can turn any word processing file into an interactive template with prompts for information and coded instructions which customise the final output. The completed document is then ready to save and print within your word processor.

Intelligent Templates

The process of document automation involves using a coded template to create new, unique documents. The template contains merge codes and scripts that intelligently replace the parts of a document that change each time it is produced. In seconds, this "intelligent template" creates a unique, customised document with the new data.

A HotDocs template makes decisions about what to include

- ✓ it can restrict input to text, numbers or date formats;
- ✓ it can ensure that a name always appears in upper case or a date is always entered in a particular format;
- ✓ it can enter a number in both numerical form and spell it out in words without the user needing to key it in both forms;
- ✓ it asks for answers only once regardless of how many times they appear in the document (even if they need to appear in different forms);
- ✓ it performs calculations on the fly, not only mathematical calculations with numbers but also date calculations like past and future dates, and text calculations which select the right word or phrase or combine multiple answers into one string;
- ✓ it determines the proper gender-based language, plurals and verb tense;
- ✓ it can include or exclude sections of a document depending on answers given.

Common Clauses

You can build a clause library using HotDocs that provides access to commonly used paragraphs, execution clauses or anything that is regularly used in documents. You can select one or more clauses and insert them into a document while the document is being generated, or at any time after.

One Data Source

You can store your answers in HotDocs answer files to use later with other templates. Type names and addresses once and drop them into other documents without retyping. Alternatively, have HotDocs read the data from an existing database and feed this through to your document during the assembly process. HotDocs can access data from Microsoft Access, Microsoft SQL, Oracle or most ODBC-compliant databases. HotDocs can even write amended answers back to the source database.

Easier Than Macros

HotDocs coding is easier to learn and use than complicated macro languages, while still giving you the power to create complex precedents. You can automate a simple precedent in less than 10 minutes, even when first learning HotDocs. HotDocs coding is consistent across word processors and different versions of word processors. So you won't need to redo your automation when you upgrade your word processor to a new version, or even if you change word processors.

Web Server Document Assembly

HotDocs Online is a web-based version of HotDocs document automation software that uses a standard web browser to gather answers. The answers are then used to assemble documents from HotDocs templates stored on the server. HotDocs Online can be implemented into a company's Intranet site for internal use, or can be implemented and used across the Internet.

HotDocs Online uses an internal engine for assembling documents without invoking a word processor. A user does not need to have HotDocs on their computer as the assembly process occurs entirely on the server. Depending on specifications set by the web administrator, the finished documents can be printed or downloaded, and answers can be stored on the web server or a local computer and used again to complete other templates and forms.

Graphical Forms Automation

HotDocs Automator is an application used to create graphical forms, independently of any word processing or graphics application. You can create a HotDocs form template by simply printing any graphics-based file to the HotDocs printer driver. You can even scan in a printed form that someone else has created. Once you have created the HotDocs form template, you overlay editable fields on the form and assign HotDocs variables to them. The editable fields are the only parts of the form that a user can access.

How HotDocs Works

HotDocs is invoked by clicking a tool within your word processor. This opens the HotDocs library window, where your templates or precedents are listed.

Templates can be grouped into folders and subfolders, and the same template can be listed in many folders.

Links to other sources of information such as internet websites, intranet documents, PDF or other files can be added to the HotDocs library.

Library entry Properties can be viewed in the HotDocs library window, and the contents of most entries can be viewed from the Preview screen before launching.
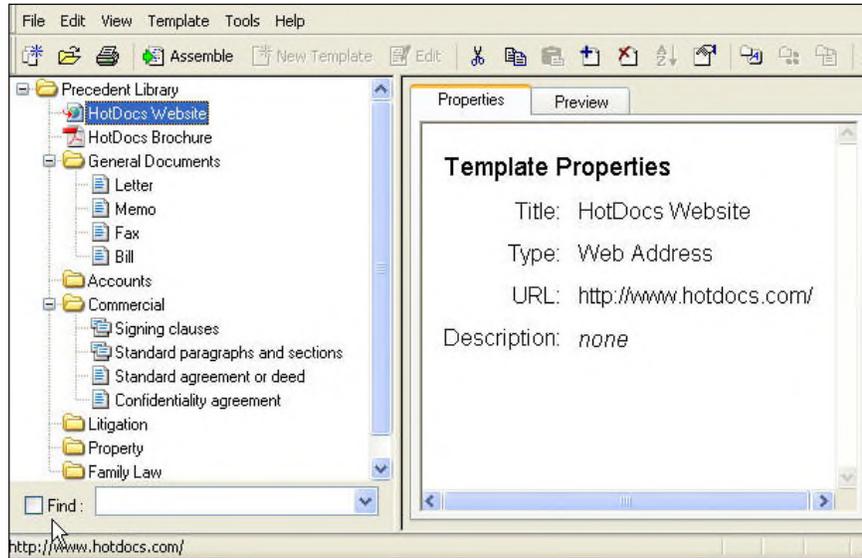
The HotDocs library window also has a handy Find feature which can search within the names and descriptions of all entries for a specified string of characters, making it easier to locate precedents.

To create a new document from a HotDocs template, select the template in the library window and click the Assemble button. HotDocs will then launch the interview process using dialogs to gather answers from the user.
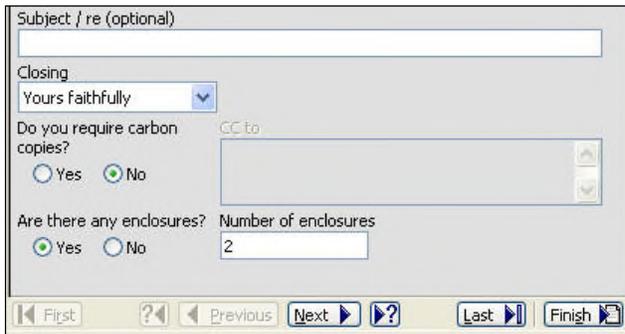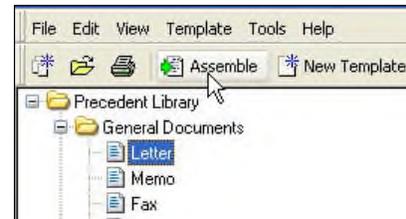
Dialogs can let a user type a text entry or a number, select an entry from a list, pick a date by clicking on a calendar, and even restrict entry to specified variables dependent on other answers.

During the interview process, users can move between dialogs by clicking the Next button, or go back and review or change earlier answers by clicking the Previous button. A separate interview panel can also be used where users can see the complete interview outline and click on any dialog in any order.
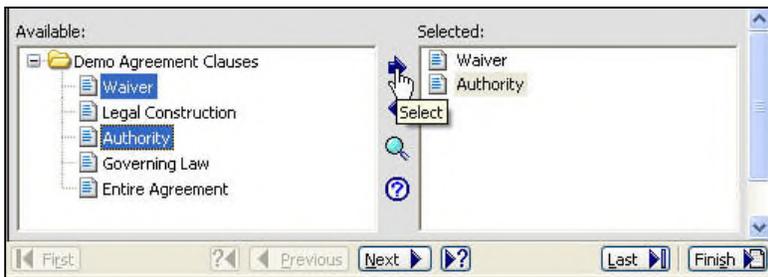
Clauses can be inserted in an existing document at any time by selecting the required clause library from the main HotDocs library window and clicking the Assemble button. Clause libraries have a different icon in the HotDocs library window to a HotDocs template (look at the "Signing clauses" and "Standard paragraphs and sections" items in the library diagram above).

The clauses contained in the selected clause library are then displayed (there may be many of these grouped in folders and subfolders). You select any number of clauses in the order you want them inserted, then click Next to continue. HotDocs will conduct any interview processes required by the selected clauses, then prompt to paste the assembled clauses in the current document or a new document.