

NYMetro HotDocs Users Group

**Organizational
Meeting**
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Agenda for NYMetro

- Organization
 - Meeting schedule and location
 - Purpose of group and services
- Presentation
 - New Features of HotDocs 5.2
 - To “Pro” or “Not to Pro”
- Muggle Studies
 - One approach to planning a major HotDocs project
 - Open forum on approaches and ongoing projects
- Future Topics



Organization of NYMetro

Topics for Discussion

- Time of Meetings
 - Quarterly in early morning
 - Brief ... no more than 2 hrs
 - Other proposals?
- Purpose of Meetings
 - Sharing
 - Education
 - Networking
- Organization
 - Ad hoc organization
 - Coordinator and volunteers, but no dues
- Other Services
 - Minutes of meeting?
 - Distribution of handouts?
 - NYMetro e-Newsletter?
 - NYMetro list-serve?
- Formal training classes?
 - Level of training?
 - Free or fee?
- Membership List
 - Open or blind copy?
 - Restrictions on use of list?



New features in HotDocs 5.2

HotDocs

HotDocs Pro

HotDocs
ONLINE



New features

Topics to be covered

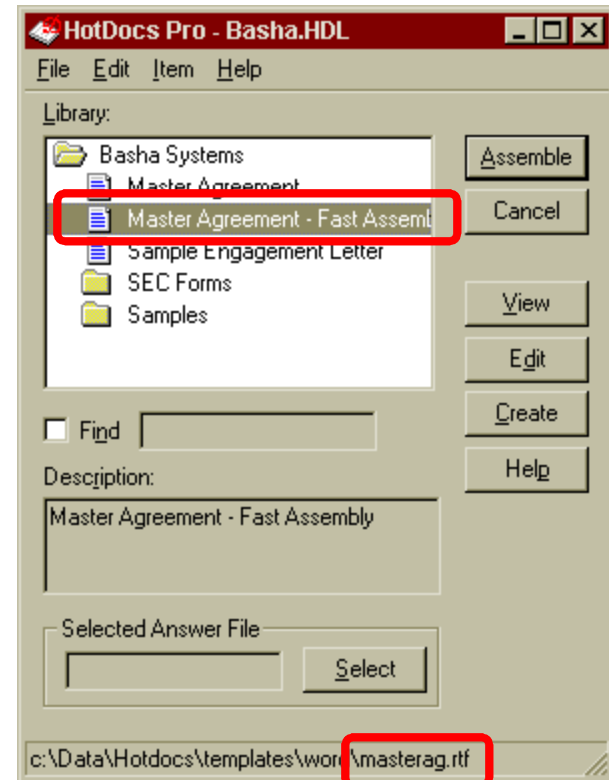
- Fast Assembly of Word templates
- Alternative Answer File Types
- Additional Capabilities for Graphic Forms
- HotDocs Pro and Browser-based Dialogs
- General Program Improvements



New features

Fast Assembly – Word RTF

- Why Fast Assemble?
 - Long document assembled in seconds vs. minutes
 - DOT templates rely on slow Word macros for assembly
 - RTF templates don't
- Converting DOT to RTF
 - Select the template
 - Click CREATE
 - Change file extension & title
 - Click OK





New features

Data Integration – Alternate Answer Files

- Why “text” answer files?

- To get data from other programs without using the HotDocs Integration Kit

- Elements of the file

- File type definition
- Error debugging code
- Variables and answers
- Repeat variables

- Caution – Read Only

To create a text answer file

1. Open Notepad or some other application that can save information as plain text.
2. Use the following syntax, replacing the model ANSWER_TYPE with a variable model, such as TEXT, NUMBER, DATE, TRUE_FALSE, or MULT_CHOICE:
 - HOTDOCS ANSWER FILE 4
 - TITLE “answer file title”
 - ERROR “error %s message %s”
 - ANSWER_TYPE “variable name” { ANSWER “variable answer” }
 - TEXT “Name TE” { ANSWER “Sally” }
 - NUMBER “Amount NU” { ANSWER “250” }
 - DATE “Closing DA” { ANSWER “05/01/2001” }
 - TRUE_FALSE “Purchase TF” { ANSWER “TRUE” }
 - MULTI_CHOICE “Type MC” { ANSWER “Corporation” }
 - TEXT “Children TE” { ANSWER “David” ANSWER “Susan” }
 - ...and so on
3. Save the plain text document with the .ANT file extension. (After you exit your saved document, you may have to manually change the file extension in Windows Explorer.)



New features

Data Integration – Alternate Answer Files

- What is XML?
 - XML = Extensible Markup Language
- Why use XML?
 - Standard format to transfer data to and from programs
 - HotDocs Online
- XML Definitions
 - Answers
 - Repeats
 - Variable types
 - Answer set title

Document Type Definitions

```
<!--ELEMENT AnswerSet (Answer*)>
<!--ELEMENT Answer (TextValue | NumValue | DateValue | TFValue | MCValue |
  ClauseLibValue | DBValue | RptValue)>
<!--ELEMENT RptValue (TextValue* | NumValue* | DateValue* | TFValue |
  MCValue* | ClauseLibValue* | DBValue* | RptValue*)>

<!--ELEMENT TextValue      (#PCDATA)      >
<!--ELEMENT NumValue       (#PCDATA)      >
<!--ELEMENT DateValue      (#PCDATA)      >
<!--ELEMENT TFValue        (#PCDATA)      >
<!--ELEMENT MCValue        (SelValue*)    >
<!--ELEMENT ClauseLibValue (ClauseSelValue*) >
<!--ELEMENT DBValue        (DBCColumn*)   >

<!--ELEMENT DBCColumn (TextValue | NumValue | DateValue | TFValue | MCValue)>
<!--ELEMENT SelValue      (#PCDATA)      >
<!--ELEMENT ClauseSelValue EMPTY        >

<!--ATTLIST AnswerSet title CDATA #IMPLIED save (true | false | nochange)
  #IMPLIED useMangledNames (true | false) #IMPLIED>

<!--ATTLIST Answer name CDATA #REQUIRED save (true|false|nochange)#IMPLIED>

<!--ATTLIST TextValue      unans (true | false) #IMPLIED>
<!--ATTLIST NumValue       unans (true | false) #IMPLIED>
<!--ATTLIST DateValue      unans (true | false) #IMPLIED>
<!--ATTLIST TFValue        unans (true | false) #IMPLIED>
<!--ATTLIST MCValue        unans (true | false) #IMPLIED>
<!--ATTLIST ClauseLibValue unans (true | false) #IMPLIED>
<!--ATTLIST ClauseSelValue title CDATA #REQUIRED fileName CDATA #REQUIRED
  description CDATA #IMPLIED>
<!--ATTLIST DBCColumn name CDATA #REQUIRED>
```




New features

Data Integration – Alternate Answer Files

- XML answers
 - AnswerSet title
 - Answer name
 - TFValue
 - DateValue
 - NumValue
 - TextValue
 - RPTValue
 - MCValue

```
<Answer name = "Simple project hourly rate NU">
  <NumValue>150</NumValue>
</Answer>
<Answer name = "(ANSWER FILE DESCRIPTION)">
  <TextValue></TextValue>
</Answer>
<Answer name = "Contractor TE">
  <TextValue>Weil</TextValue>
</Answer>
<Answer name = "Contractor city TE">
  <TextValue>New York</TextValue>
</Answer>
<Answer name = "Contractor name TE">
  <TextValue>Weil, Gotshal & Manges, LLP</TextValue>
</Answer>
<Answer name = "Contractor state TE">
  <TextValue>NY</TextValue>
</Answer>
<Answer name = "Contractor street1 TE">
  <TextValue>767 Fifth Avenue</TextValue>
</Answer>
<Answer name = "Contractor zip TE">
  <TextValue>10153</TextValue>
</Answer>
<Answer name = "Simple Project description TE">
  <TextValue>Automation of Generic Opinion Letter</TextValue>
</Answer>
<Answer name = "Simple project document TE">
  <RptValue>
    <TextValue>Opinion Letter</TextValue>
    <TextValue>Backup Memo</TextValue>
  </RptValue>
</Answer>
</AnswerSet>
```

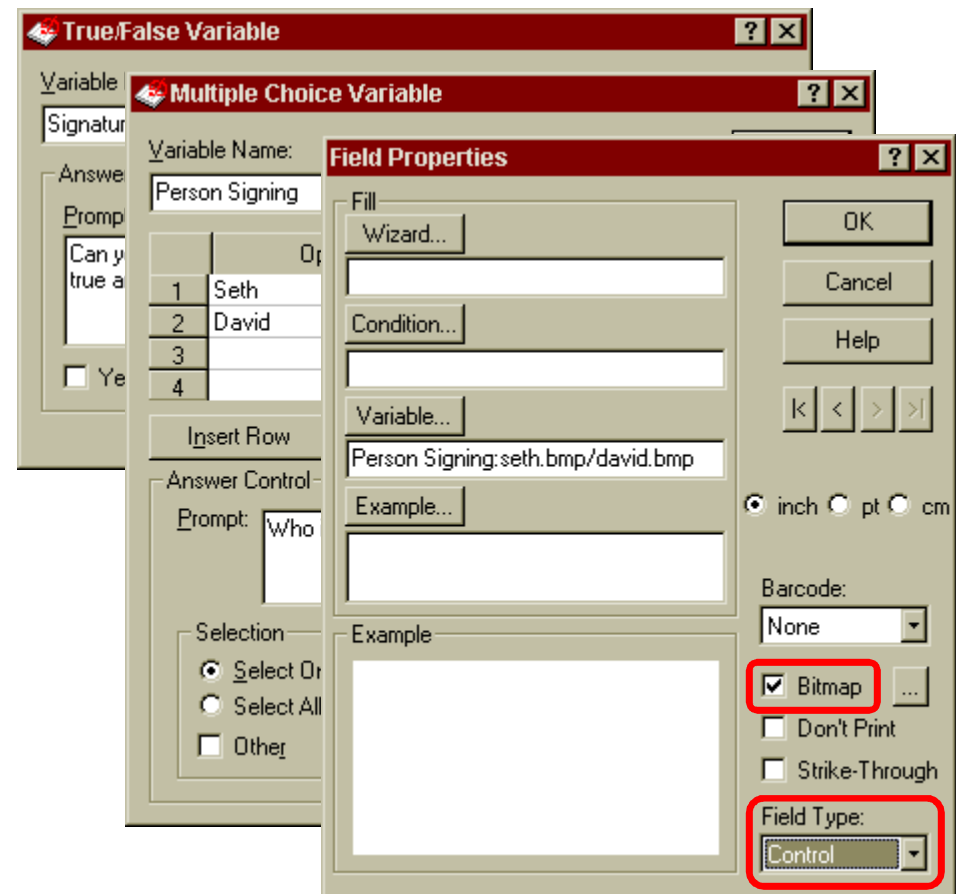


New features

Improvements in HotDocs Automator

- Rule-based graphics

- For True/False variables, use a graphic file as your “Format Example”
- For multiple choice variables, use a graphic file as your “Merge Text”
- Define your Field Properties to allow bitmap files
- Set your “Field Type” to “Control” to make bitmap non-editable





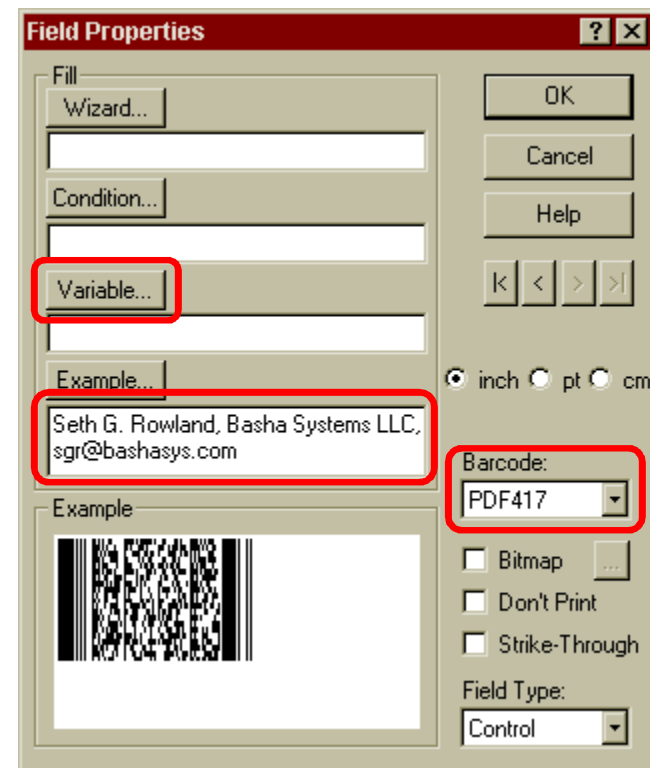
New features

Improvements in Automator



● Bar Code support

- Why use bar codes?
 - ✓ Extract information from printed forms
 - ✓ Document identification
- How to use bar codes?
 - ✓ In Field Properties, set Barcode to “PDF417”
 - ✓ For a fixed barcode, enter text in “Example” and set Field Type to “Control”
 - ✓ Or create a text string with delimiters in a text computation variable





New features

Other improvements and changes

- **Multiple Templates:** Create an assembly cue for graphic and text forms
- **Answer Files:** Save button on answer dialogs
- **Alternative to PDF:** Send blank and completed graphical forms via e-mail
- **Number Variables:** Decimal places increased to seven
- **Error Messages:** Improved and more descriptive.
- **Spreadsheet Dialogs:** Support for word wrap of long prompts.

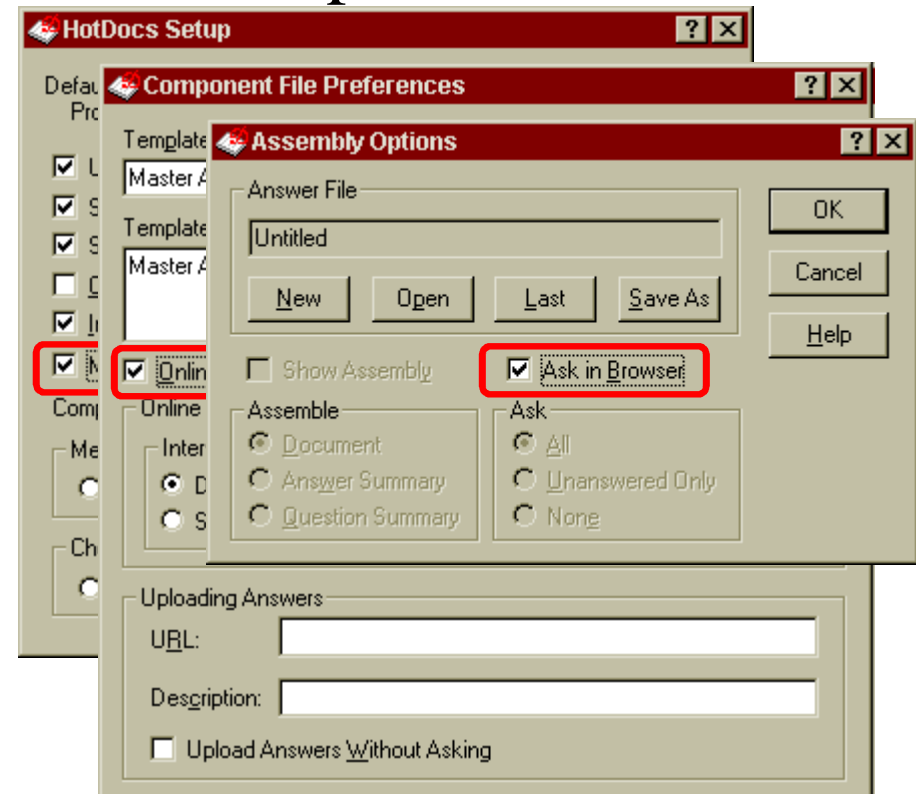


New features

Browser-based Dialogs and HotDocs Online

- View an Interview in Internet Explorer

- Applies to Word/RTF and WordPerfect files
- Change HotDocs Setup to test for Online Compatibility
- In component file, turn on “Online compatibility mode”
 - ✓ Interview type
 - ✓ Presentation style
- In Assembly Options, check “Ask in Browser”





New features

Browser-based Dialogs and HotDocs Online

- ▶ Elegant rendering of multi-page dialogs
- ▶ Navigate dialogs by list & sequence
- ▶ Support for all variable types, but some design and display limitations
- ▶ Support for dynamic dialog scripting and nested questions
- ▶ Dialog menu changes with choices
- ▶ Navigation menu changes with choices
- ▶ Submit answers to produce document

Master Agreement - Fast Assembly - Microsoft Internet Explorer provided by Dell

File Edit View Favorites Tools Help

Master Agreement - Fast Assembly

Master Agreement

HotDocs Online

Master Agreement

Draft Date of Master Agreement:

Effective Date of Master Agreement:

Include Project Outlines?

Include Simple Project Agreement?

Include Complex Project Agreement:

Master Agreement Hourly Rate: \$

◀ Previous Next ▶

Reset Answers Submit



New features

Browser-based Dialogs and HotDocs Online

- Features not supported for online assembly
 - Clauses and clause libraries
 - Database components
 - Personal Information variables
 - INIKEY functions
 - DLLCALL functions
 - PLAY, STEP, QUIT, EXECUTE, INSERT, and ASSEMBLE instructions
 - ASK instructions used with the keyword FROM
 - Language instructions
 - ANSWER FILE keyword in an expression



New features

Browser-based Dialogs and HotDocs Online

● Features not supported for viewing a Web browser

- **Fomat Model.** You cannot use the FORMAT (Value, “Example”) model. HotDocs Online will ignore any formatting specified using this method.
- **T/F Menu.** If you use the Menu option of the True/False Grouping (Dialog Options), the web browser will display the True/False variables as standard buttons.
- **Prompt Formatting.** Space, carriage return, and line feed characters at the beginning or end of prompts and additional text are removed before the web browser displays the interview.
- **Answer Formatting.** Carriage return and line feed characters in literal text values (values the template developer manually enters as an actual character during automation, i.e. between double quotes) are converted to space characters before the web browser displays the interview.
- **Limits on Prompts.** The only components you can place in prompt and additional text fields are variables. These variables must not contain format examples. Additionally, you cannot use other commands or scripts in these fields, such as the special escape character, “@” (for example, @EXECUTE:).
- **Limits on Format Examples.** A web browser cannot display format examples that have been inserted in fields, prompts, or additional text. The only exception is the Merge Text from a Multiple Choice variable.
- **No Variables in MC Options.** A web browser cannot display a HotDocs field used in an option of a Multiple Choice variable. The same applies to a literal text value in an expression.
- **No Picklists.** HotDocs will ignore any picklist you have specified in a template.



To “Pro” or not to “Pro”

A few key differences

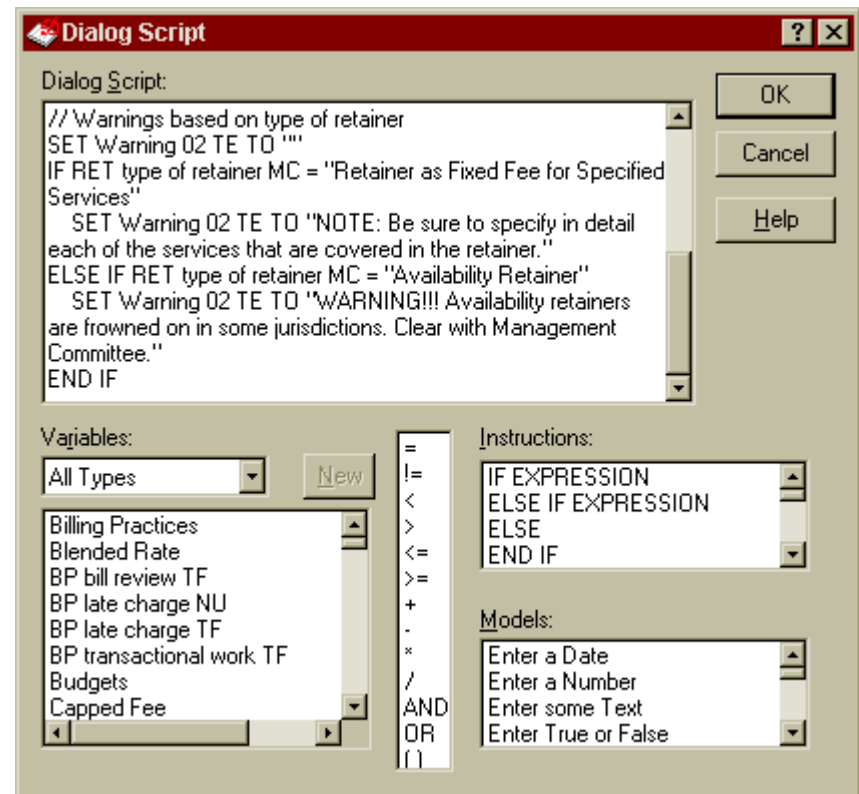
- Intelligent Dialogs
- Lists within Lists
- Graphic Forms with Automator
- Publication – Server Based Files



To “Pro” or not to “Pro”

Intelligent Dialogs

- A customized dialog built with HotDocs Pro
- TEST button to view dialog as you build it
- EDIT button and ability to relocate variables
- Variables script – Use of GRAY and UNGRAY
- Warning script – use of the SET TO command





To “Pro” or not to “Pro”

Lists within Lists ... or Nested Repeats

- HotDocs Pro supports four levels of repeats
- Primary level is set as a repeating dialog
- 1st Level text refers to first answer
- 2nd Level text refers to Level 2 answer
- 3rd Level set as a spreadsheet & refers to Level 3 answer

1: Consenting Persons

Enter the name of each person consenting to the Resolutions

Name of Consenting Person:

Hamburger Harry's, Inc.

Next Previous

1: Non-Natural Person L1

LEVEL 1 Consenting Person for Hamburger Harry's, Inc.

Next

1: Non-Natural Person L2

LEVEL 2 Consenting Person for Hamburger Harry's Limited Holding Co.

Next

Non-Natural Person L3 - Test 03.ans

LEVEL 3 Consenting Person for Robert Wood Johnson Foundation

Next

This is the fourth and final level of consenting persons. Enter the name of each person who is providing consent for the above entity to the Resolutions.

	Name of Consenting Person:
1	Sally Johnson Family Trust
2	David Boies
3	James Carville

Edit Row Insert Row Delete Row

SORRY!!! No further levels allowed. If the deal is that complex, you will need to make further delineation in the final WordPerfect file.

Clear Save



To "Pro" or not to "Pro"

HotDocs Automator



HotDocs Automator - [secform3.hft]

File Edit View Zoom Field Form Tools Window Help

FORM 3 UNITED STATES SECURITIES AND EXCHANGE COMMISSION
Washington, D.C. 20549

INITIAL STATEMENT OF BENEFICIAL OWNERSHIP
Filed pursuant to Section 16(a) of the Securities Exchange Act of 1934 or Section 307 of the Securities Exchange Act of 1934

1. Name and Address of Reporting Person			2. Date of Event Requiring Statement (Month/Day/Year)	3. IRS Identification Number of Reporting Person, if an entity (voluntary)
FRM reporting person (Last)	FRM reporting (First)	FRM (Middle)	FRM3 date of	FRM
FRM reporting person street TE				
FRM reporting person (City)	FRM (State)	FRM reporting (Zip)		

1. Title of Security (Rule 4)	2. Amount of Securities Beneficially Owned
FRM3 TB1 security title TE	FRM3 TB

FRM3 Reporting Person

1. Name and Address of Reporting Person:

First Name: Middle Name/Initial: Last Name:

Street Address of Reporting Person:

City: State Zip Code:

2. Date of Event Requiring Statement (Month/Day/Year):

3. IRS Identification Number of Reporting Person, if an entity (voluntary):

4. Issuer Name and Ticker or Trading Symbol:

5. Relationship of Reporting Person(s) to Issuer:

(Check all applicable):

Director
 10% Owner
 Officer
 Other

Title of officer or description of other relationship:

6. If Amendment, Date of Original:

7. Individual or Joint/Group Filing (Check Applicable Line):

Form Filed by One Reporting Person
 Form filed by More than One Reporting Person

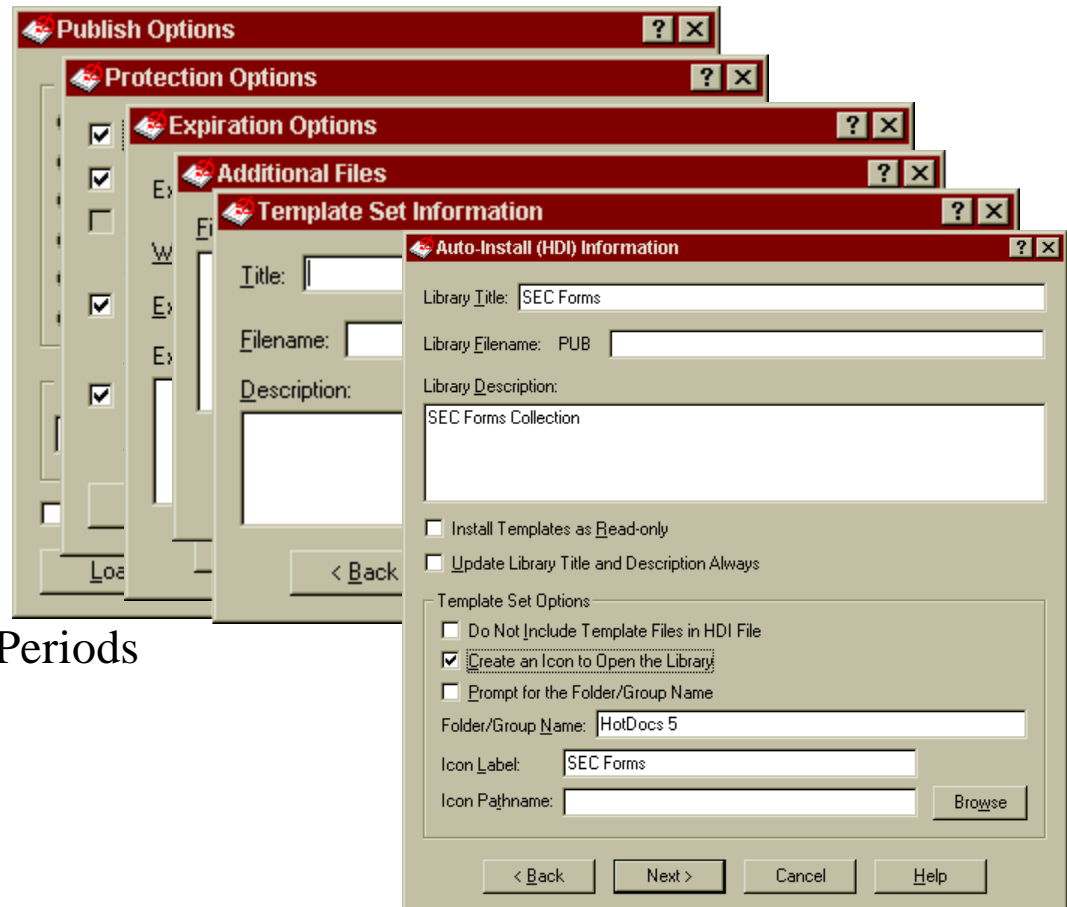
Clear Save



To “Pro” or not to “Pro”

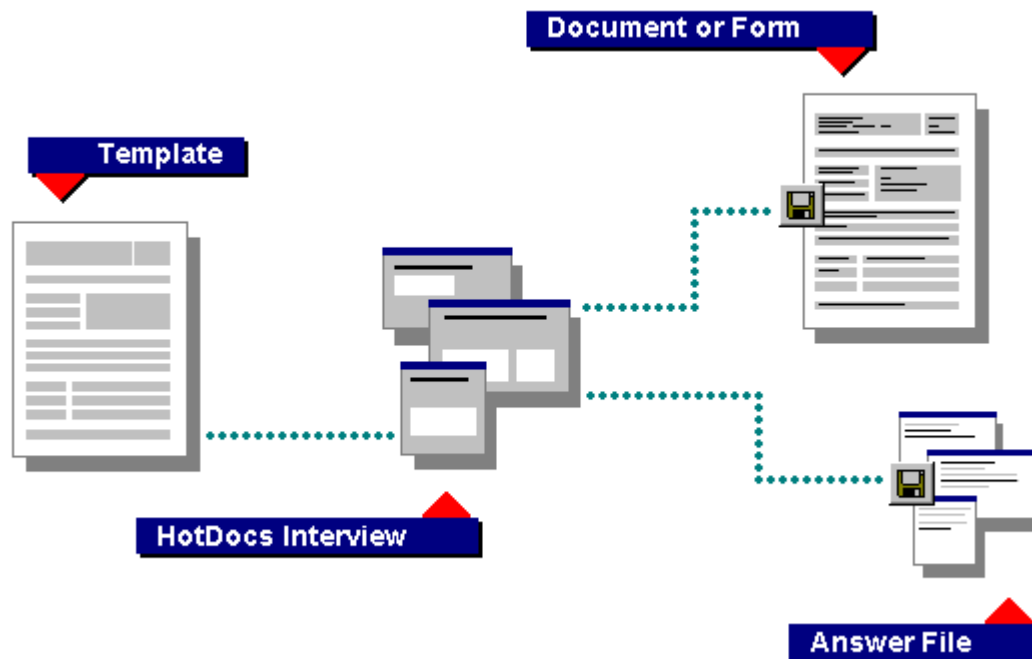
Publication Wizard

- Publish options
 - Assemble Files (HDA)
 - Install Files (HDI)
 - Online Template Files
- Protection options
 - Lock component files
 - Set expiration date
- Expiration options
 - Expiration date
 - Warning and Extension Periods
- Additional files
- Template set information
- Auto-Install information





Intro to “Muggle” Studies





Communicating with Muggles

Six Steps Before You Automate

- Process Audit
- Gather – Select and Find the Forms
 - High Volume Documents (cost-savings)
 - High Profit Margin Documents (revenue generation)
- Consolidate – Create a Master Form
 - Consistent styling and sourcing for all text
- Analyze – Identify variable and optional text
- Plan – Build a Road Map
- Document Prep – Mark Up the Template



Communicating with Muggles

Working with a variable list

Microsoft Excel - Variables Spreadsheet.xls

File Edit View Insert Format Tools Data Window Help Send

Arial 10 B I U

D24 =

DIALOG NAME: _____						
Dialogue Prompt:			Dialogue Rules:			
##	Variable Name	Type	Prompt	Rules	Help	Notes

Variable Type Keys			
TE	Text variable	MC/Other	Multiple Choice allowing data
NU	Number variable	MC/None	Multiple Choice allowing choice of none of the above
DA	Date Variable	MC/Multi	Multiple Choice allowing selection of multiple options
CO	Computation	RPT	Repeat loop
TF	True/False Variable	.../Repeat	A text, number, date, or multiple choice variable which is to be repeated in a loop
MC	Multiple Choice	.../Word	Number or Date variable to be convert to words
TF/None	Group true/false and allow none as an option.	TF/Alt	Group true/false and allow only one true answer.

Variables Sheet2 Sheet3

Ready CAPS



Communicating with Muggles

Creating an annotated answer summary

- Dialog name
- Variable prompt
- Variable name, with dialog-specific prefix and variable type suffix
- Dialog-based warning text
- Variable formatting
- Nested and embedded repeat dialog

The screenshot shows a WordPerfect 9 window with a document titled "EngageSample.WPT". The document contains several lines of code and text. Annotations with colored circles and arrows point to specific parts of the code and text:

- A red circle points to the text "Type of Fee Arrangement:".
- A yellow circle points to the code "<FEE type MC>".
- A green circle points to the code "<FEE hourly rates TF>".
- A purple circle points to the code "<FEE budgets TF>".
- An orange circle points to the code "<FEE hourly rate principal NU 9,999.00>".
- A blue circle points to the code "<REPEAT FEE hourly rate RPT:a; b; and c:>".

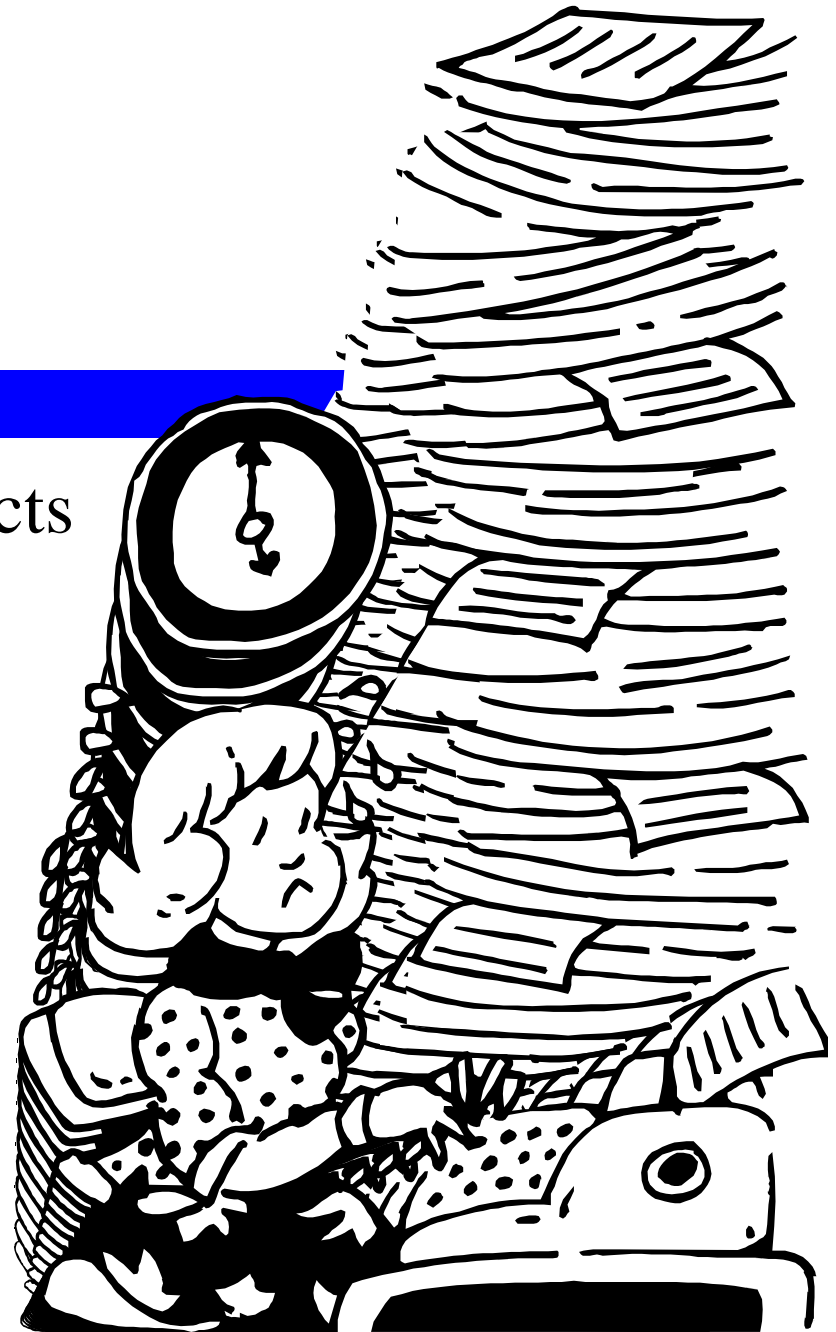
The code in the document includes:

```
< IF FEE type MC = "Basic Rates" OR FEE type MC = "Premium Rates" >
Provide hourly rate details?
< END IF >
< IF FEE type MC != "Contingent Fee" AND FEE type MC != "Fixed Fee" >
Is there a budget or estimate?
< END IF >
< IF FEE type MC = "Basic Rates" OR FEE type MC = "Premium Rates" >
< IF FEE hourly rates TF >
Fees - Hourly Rates
My standard billing rate is:
Supply range of hourly billing rates for attorneys and paralegals?
Supply names and specify hourly rates for attorneys and
paralegals who will actually be working on matter?
< IF FEE hourly rate specify TF >
Enter information on the attorneys and paralegals who will be part
of the team servicing your client:
< REPEAT FEE hourly rate RPT:a; b; and
c:>
< FEE hourly rate NU > FEE hourly rate
name
TE > < FEE hourly rate name TE > < FEE hourly
rate status MC > ($ < FEE hourly rate
NU >) < END REPEAT >
< END IF >
< END IF >
< END IF >
```



Open Forum

- Ongoing HotDocs projects
- Communicating with Muggles
- Any topic you wish





Future Topics

