

# HotDocs Developer Resources

(Updated January 20, 2009)

## Lexis/HotDocs Resources

- A. HotDocs **Evaluation Guide and Tutorials**
  - 1. A copy of the guide that ships with HotDocs is available at [http://www.hotdocs.com/documentation/guides/hd2008/HotDocs\\_2008\\_Professional.pdf](http://www.hotdocs.com/documentation/guides/hd2008/HotDocs_2008_Professional.pdf) and contains instructions on installing HotDocs as well as a series of tutorial lessons on using HotDocs Pro.
  - 2. The HotDocs website has additional downloadable tutorials on various subjects including the WHILE instruction, overflowing rows from a table, and clear and add instructions. These tutorials are available at <http://www.hotdocs.com/documentation/tutorials/>.
- B. HotDocs **Program Help in PDF format** is available for download at <http://www.hotdocs.com/documentation/printable/>. HotDocs does not distribute a printed manual, but the excellent electronic help is downloadable and printable in seven PDF files.
- C. The HotDocs **Knowledgebase**, available at <http://support.hotdocs.com/knowledgebase/>, is divided into several sections including Developer Corner and Problems and Solutions. Developer Corner has step-by-step solutions for common tasks, such as how to gray additional text in dialogs and many sample text, date, time number, and repeat computations. Problems and Solutions addresses issues frequently addressed by HotDocs technical support personnel, such as "Extra Hard Returns Inserted in Assembled Documents"
- D. HotDocs **service packs**, when available, are available at <http://www.hotdocs.com/downloads/>.
- E. LexisNexis offers a **HotDocs Forum** that is very active and a good place to post questions and read about potential solutions. You can view posts and subscribe at <http://forum.hotdocs.com>.
- F. HotDocs **Tech Support** provides help for installation problems only. The phone number is (800) 828-8328.

## Legal Services Specific HotDocs and A2J Resources

- G. The **Pro Bono Net Document Assembly Support** website, <http://www.probono.net/dasupport/>, is a resource center for all states developing document assembly initiatives using National Public Automated Documents Online (NPADO), including links to recorded A2J Author and HotDocs trainings, software tips, example evaluation reports, usability testing tools, and more.
- H. The **A2J Author** website, <http://www.a2jauthor.org/drupal/>, is where you can download the A2J Author software, access software documentation, find announcements about the quarterly developer calls, and report bugs.
- I. A special **Legal Services Document Assembly E-mail List** devoted to developers of templates for NPADO. Basic questions are encouraged and are responded to by community members, including the Capstone staff. You can subscribe at <https://lists.mayfirst.org/cgi-bin/mailman/listinfo/docassembly>. A link to archived messages from this list is also available on the above page.
- J. As part of its contract with Pro Bono Net, Capstone provides **developer support and**

**mentoring.** Developers are encouraged to post their questions on the legal services list first, so that the entire community can benefit from the exchange; however, if the question can't be resolved on the list, Capstone can provide one-on-one assistance via e-mail or phone.

- K. Pro Bono Net hosts monthly **developer conference calls** that include presentations and discussions on selected HotDocs topics as well as information about staffing, project planning, plain language, and so on. Topic suggestions from the community are welcome. The dates for these calls are announced on the Legal Services Document Assembly E-mail List.
- L. The **LSNTAP** website has introductory material about document assembly and examples of how the legal services community uses it at <http://www.lsnatp.org/lilbookshelf?tid=49&name=Document%20Assembly>.
- M. The **Contributor Portal** is a listing of all of the templates uploaded to the national server. You can test or download any uploaded template. To access the Contributor's Portal, go to [www.npado.org](http://www.npado.org) and choose option 2. Note that the Contributor Portal is only available if you have registered and been approved as a template provider.
- N. Legal Systematics has developed **Family Law System Kit**, which is a HotDocs component file and associated sample HotDocs templates, A2J interview, and documentation for family law/divorce systems. This kit contains hundreds of prefabricated HotDocs components (variables, computations, dialogs) representing best practices for HotDocs divorce systems. Many of the components and techniques can be adapted to other practice areas. Because it was funded under a TIG to Legal Services of Western New York from the Legal Services Corporation, this kit is free to LSC-funded programs. The components can be freely used for nonprofit purposes, including in templates posted on NPADO. For more information and a license agreement contact [marc@legalsystematics.com](mailto:marc@legalsystematics.com).
- O. **Standards and Practices** for HotDocs Online Applications in Legal Services is a 30-page resource that addresses template standards; naming conventions; selecting, planning, and designing applications; pointed component files; HotDocs versions; and other topics relevant to developing templates for deployment in HotDocs Server. It is available at [http://www.lsnatp.org/sites/lsnatp.org/files/hds\\_standards\\_and\\_practices.pdf](http://www.lsnatp.org/sites/lsnatp.org/files/hds_standards_and_practices.pdf).
- P. **Contributor's Guide to the National Legal Services Document Assembly Server** is a step-by-step guide to uploading completed HotDocs templates to the national server. It is available at [http://www.lsnatp.org/sites/lsnatp.org/files/a\\_contributors\\_guide\\_to\\_the\\_national\\_legal\\_services\\_document\\_assembly\\_server.pdf](http://www.lsnatp.org/sites/lsnatp.org/files/a_contributors_guide_to_the_national_legal_services_document_assembly_server.pdf).

### **Other Resources**

- Q. Jim Garrison's **computation archive** at <http://www.legalcs.com/hotdocs/index.htm> is an excellent compendium of HotDocs computations developed to address various tasks such as parsing a full name into first, middle, and last names. Note that most of these computations were developed for HotDocs 5 and may not work in current versions of HotDocs. Some computations are free and some require a subscription.
- R. HotDocs **user groups** are active in several communities, including Boston and Philadelphia. To find a local user group, go to <http://www.hotdocs.com/support/community/>.
- S. **Keys to a Successful Document Assembly Project** by Marc Lauritsen and Alan Soudakoff describes how to select, plan, and manage a successful document assembly project. It is available at <http://www.capstonepractice.com/keys.pdf>.