

HotDocs & LawBase

HotDocs™ is a third-party document assembly program which is integrated with LawBase. This is a quick reference for the most common features used with LawBase.

LBAdmin Settings

System > Cosmetics > Hot Docs and fill in the path to the HotDocs library. The library file is typically lawbase.hdl, in the HotDocs directory.

```
<main lawbase directory>\HotDocs\lawbase.hdl
```

Editing Templates

Start **HotDocs Developer** from the Start button.

HotDocs Templates and Other Word Processing Documents

Every template is made up of two parts – the rtf file and a cmp file which holds the variables.

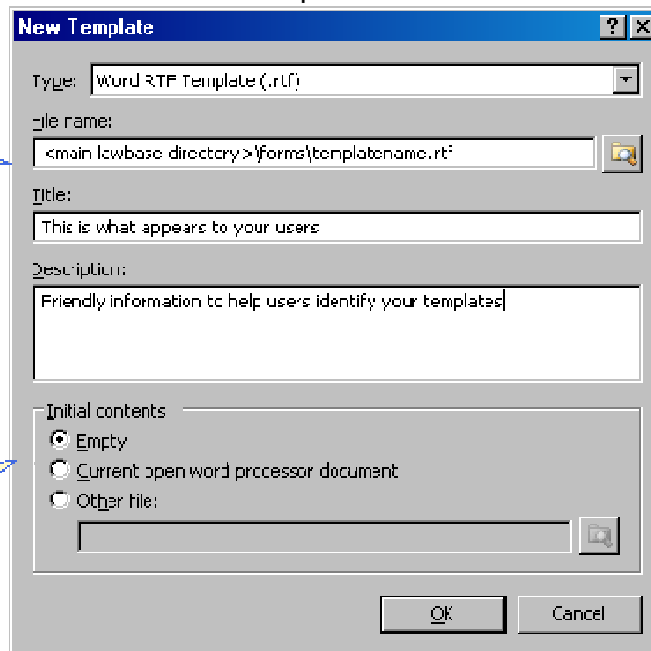
Adding a Template to the Library

Creating a New Template Click New Template on toolbar




This is where the template is saved

This is the source. Are you using an existing document? currently open document?

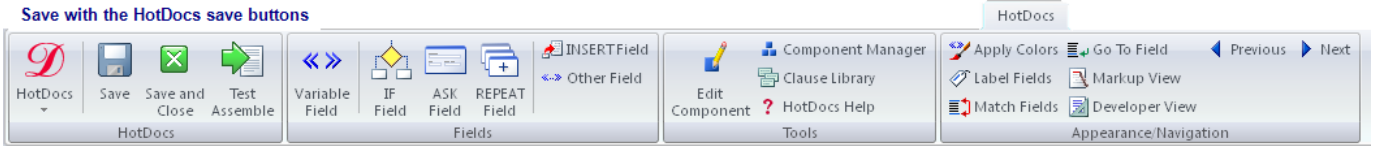


Copied from other Location

Perhaps saved from email or copied to your forms directory from C drive

1. Copy the .rtf file and .cmp file to the forms directory
2. Click the add item button 
3. Browse out to the file and add to library

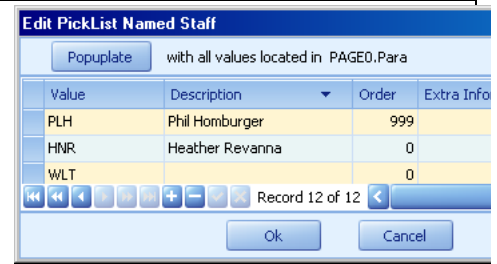
HotDocs Toolbar in your Word Processor



Common Variable Examples

LawBase Variables

Basic fields	<p>Syntax: lb_pagename_fieldname</p> <p>Use the correct variable type to match the field in LawBase Text, Date, Number and so on</p> <p>Examples: lb_header_atty, lb_clientinfo_name</p>
Caselinks	<p>Syntax: lb_link_casetab_casefield_contactfield</p> <p>Example: lb_link_addpartyinfo_name_name</p> <p>This is simplified; see the LawBase help for more details.</p>
Repeatable	<p>Syntax: lb_r_pagename_fieldname</p> <p>R indicates that there are multiple (repeated) values</p> <p>Select the text to be repeated and add a repeat from the HotDocs ribbon.</p>
Selected entry from repeatable tab	<p>Syntax: lb_pagename_fieldname</p> <p>Place cursor in record to select one record from repeatable tab before running</p>
Pick list	<p>Syntax: lb_pagename_fieldname</p> <p>Returns the value populated in the picklist.</p>
Pick list description	<p>Syntax: lb_pick_<picklistname>_<page>_<field></p> <p>Example: lb_pick_staff_header_paralegal</p>

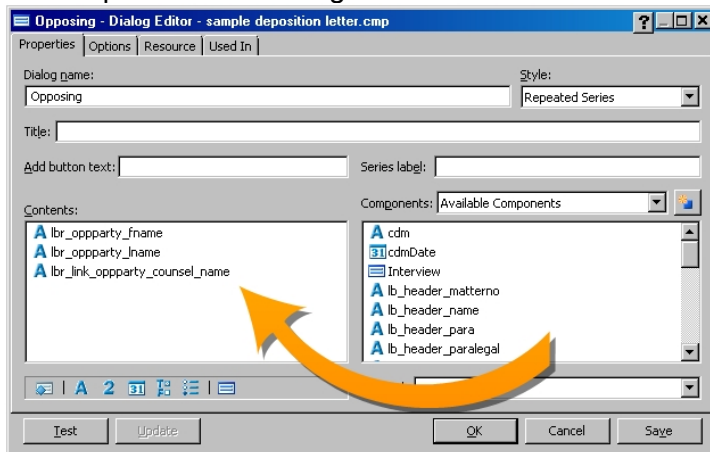
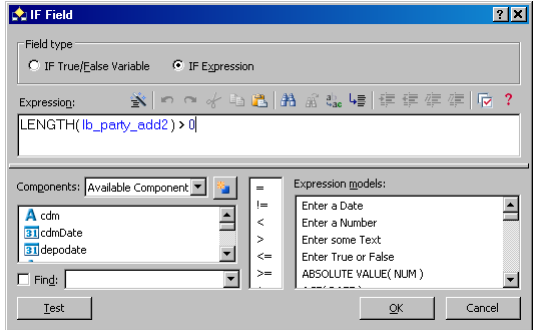


HotDocs Variables

Ask	<p>Ask Dialog.</p> <p>Gathers questions so they appear on one page</p> <p>Drag the non-LB variables into the ASK</p>
Computation Variables	<p>Use these to set values, perform calculations, write back to LawBase</p> <p>This example sets a date value.</p> <p>SET cmddate TO TODAY + 14 DAYS</p>

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<p>If</p>	<p>Sets behavior based on a condition. Example: If there is no address line 2, don't leave a blank line and carriage return. What the IF actually says: if the length of the field is greater than 0, print it. If it is not, then don't.</p> <p>In the template</p> <ol style="list-style-type: none"> 1. Select the variable and carriage return lb_party_add¶ 2. Click the IF button 3. Fill it in as shown on the right. <p>The text in the template looks like this: «IF LENGTH(lb_party_add2) > 0» «lb_party_add2»«END IF»</p>
<p>Insert</p>	<p>Inserts another template. Commonly used for letterhead, signature blocks. Example: Insert "letterhead.rtf" Browse to the location of the other template. Note: do you want to include the header or footer?</p>
<p>Interview Questions</p>	<p>Example: During the interview, ask the user for a date that is not stored in LB but is used in the document. Create a variable, give it a non LB name, and fill in the prompt. Example: depodate</p>
<p>Repeat</p>	<p>Select the text to be repeated and click the repeat button on the HotDocs ribbon. Name the dialog as you like. Drag the related variables from the available list into the dialog. Typically used with Repeatable tab and grids.</p>
<p>TODAY</p>	<p>Standard HotDocs variable. Type is Date</p>



How do LawBase Users Access HotDocs?

From inside a case, contact or other file, click the HotDocs button to launch the library.

References

- For complete HotDocs documentation, refer to the online help installed with HotDocs.
- For complete LawBase documentation, refer to the online Admin Help.