

# Comparison of Features in HotDocs 10 Editions

Using HotDocs, you can convert both your word processor documents and your graphics-based forms into interactive templates. You can then automate them so that changeable text is replaced with variable fields. HotDocs can compute values, determine what text to include or exclude based on answers, change gender references, and even update verb tenses.

The following table describes some of the features available in each edition of HotDocs.

	Developer	Developer LE
<b>Template Development</b>		
<b>Create One Template to Produce Multiple Customized Documents</b>		
Create text-based templates using either Microsoft® Word or Corel® WordPerfect®.	✓	✓
Create a graphic-based form template using a design or draw program.	✓	
Create a pre-assembly interview template that asks for information that can be used in multiple templates. Users answer the questions once and are able to retrieve them whenever they assemble related documents.	✓	✓
Automate templates using international languages that are supported in the Unicode character set.	✓	✓
<b>Change the View of the Automated Template</b>		
View an outline of scripting in the template.	✓	
Generate a markup version of the template for non-developers to review.	✓	
<b>Make Text in the Document Conditional</b>		
Include or remove text in the document based on answers the user enters. The condition under which this happens can be as simple or as complex as it needs to be.	✓	✓
<b>Replace Changeable Text in the Template with Variables</b>		
Input different types of data, including text, dates, numbers, multiple choice options, true/false answers, and calculations.	✓	✓
Format answers to appear differently each time the answer is merged in the document. (For example, a name may need to be in capital letters in a title, while in the rest of the document, it may require only initial caps.)	✓	✓
Include extra information with a variable to help the user answer the question.	✓	✓
Mark template text so it can be edited by users during assembly.	✓	
<b>Divide Text in the Template into Clauses</b>		
Turn sections of a template into clauses and make them optional.	✓	✓
Allow the user to choose from an assortment of clauses by placing all of the clauses in a library. Include the clause library either directly in the template (so all selected clauses will be merged into the existing document) or in the template library (so a user can add selected clauses to any document).	✓	✓

## Template Development (Continued)

Developer  
Developer LE

Use Calculations and Computations		
Perform simple or complex calculations for the user. For example, you can calculate a monetary value, determine a future date, or search a user's answer for a certain word or phrase	✓	✓
Group Questions (Variables) Using Dialogs		
Group related questions in dialogs so questions can be asked together and in the right context.	✓	✓
Use dialog scripting to dynamically change the appearance of variables in the dialog, based on users' answers.	✓	
Have HotDocs automatically exclude variables that are irrelevant during the interview. Variables can be hidden or grayed.	✓	
Repeat a dialog multiple times to gather a list of answers, rather than a single answer. Sort and filter the resulting list.	✓	✓
Create lists of answers within lists of answers. For example, you can create a list of creditors and then generate a list of the amounts owed to each creditor.	✓	
Link dialogs to special answer source files so users can access answers entered using an interview template.	✓	
Control how many variables appear on a single line in the dialog	✓	
Include lines, spacing, images in dialogs	✓	✓
Insert Other Templates into the Current Template		
Use INSERT instructions to merge boilerplate text into the current template.	✓	✓
Place instructions in a template that cause HotDocs to assemble other documents.	✓	
Use INSERT instructions to include images.	✓	✓
Use variable INSERTs to specify inserted file names during assembly.	✓	✓
Automate Form Templates Using HotDocs Automator		
Use HotDocs Automator to convert government, court, banking, and other "static" forms into interactive templates.	✓	
Use both static and fillable PDFs as the basis for form templates. (Requires a HotDocs® PDF Advantage user license.)	✓	
Test Templates and Troubleshoot Problems		
Test assemble your template or test your script in DEBUG mode and pinpoint automation problems that are creating outcomes you wouldn't expect.	✓	
Test assemble the template and use the Test Panel to examine how variables are used in the template.	✓	
Test assemble the template and use the Test Panel to move from the Document Preview tab of the test assembly window to a specific place in the template.	✓	
Link Templates to a Database		
Link variables in a template to a database so answers can be retrieved from your data store. Assemble these documents	✓	✓

## Template Development (Continued)

Developer  
Developer LE

<b>Manage Components in a Template File Using Component Manager</b>		
Manage all components in a template using Component Manager.	✓	✓
Keep Component Manager open while you work in the template. Drag components from it directly to the template.	✓	✓
Specify interview and assembly properties at the component-file level.	✓	✓
Create, edit, delete, rename, and copy components.	✓	✓
Search components for text; replace found instances with new text.	✓	
Spell-check text used in components.	✓	
<b>Manage Components in Multiple Templates Using Template Manager</b>		
Rename templates and have all references to the template in the set updated as well.	✓	
Batch convert templates to the recommended RTF file type. Also convert from older versions of HotDocs to the most recent version.	✓	
View a master list of components and determine how they are being used in templates.	✓	
Rename components in both the component file and the template.	✓	
Copy components from one file to another.	✓	
Change component file properties in multiple templates at once.	✓	
<b>Publish Templates So Others Can Use Them</b>		
Create auto-install files that install new libraries of templates or update existing libraries and templates.	✓	
Create auto-assemble files that will automatically assemble when the user executes the file. (Auto-assemble files are temporary—once the user finishes assembling and has produced a document and/or answer file, the template files are deleted.)	✓	
Apply security settings and expiration dates for published template sets.	✓	
Provide automatic updating for your published template sets.	✓	
<b>HotDocs Server Templates</b>		
Test a template in a simulated online environment before publishing it for live use.	✓	
Publish all files needed for server-based assembly.	✓	
Test Server-based templates using HotDocs Silverlight.	✓	
<b>Remove Personal or Hidden Data from Word Templates and Documents</b>		
Use the Hidden Data Remover to remove all personal information as well as some hidden document properties from your template set.	✓	
Select an option to remove all personal information as well as some hidden document properties from documents your users assemble.	✓	✓

# Document Assembly

Developer  
Developer LE  
User  
Player

<b>Complete Interviews and Assemble Documents</b>				
Assemble your own templates as well as those from licensed HotDocs publishers.	✓	✓	✓	
Change the font properties of dialog text, and assign custom colors to items in the assembly window.	✓	✓	✓	✓
View an outline list of dialogs used in the template. Click an icon to move to that dialog.	✓	✓	✓	✓
View and answer questions in the dialog pane. Access additional information about questions in the resource pane.	✓	✓	✓	✓
Preview the assembled document right in the assembly window. In Word documents, edit answers while you preview.	✓	✓	✓	✓
See summaries of questions and answers.	✓	✓	✓	✓
Save your answers any time during assembly. Switch answer files at any time, as well.	✓	✓	✓	✓
Edit the text of the assembled Word document while previewing at the assembly window.	✓	✓	✓	✓
Assemble documents using international languages that are supported in the Unicode character set.	✓	✓	✓	✓
<b>Directly Fill Form Documents (using HotDocs Filler)</b>				
Click the Form Document tab during the interview and enter answers directly on the form.	✓	✓	✓	✓
Send any answers that don't fit in the answer field to an addendum.	✓	✓	✓	✓
Customize the appearance of the addendum. Customize references to it from the form document.	✓	✓	✓	✓
Use answer wizards to help enter the correct information in the form fields.	✓	✓	✓	✓
<b>Run Post-Assembly Instructions in Assembled Documents</b>				
Attach Word or WordPerfect macros to a HotDocs template. Instructions in the macro will be executed after the document is assembled and saved, printed, or viewed in the word processor.	✓	✓	✓	✓
<b>Use Model Documents</b>				
Use HotDocs to assemble model documents.	✓	✓	✓	
Convert model documents to template format and vice-versa.	✓			

## Document Assembly (Continued)

	Developer	Developer LE	User	Player
<b>Answer Files</b>				
Choose which answers to use when you start an assembly.	✓	✓	✓	✓
Save answers when you complete an interview in XML format. (XML format lets you integrate your answer files with other applications that support XML.)	✓	✓	✓	✓
Import answers you get from other users into Answer File Manager and add the file to your recently used lists.	✓	✓	✓	✓
Preview existing answers before selecting an answer file for an interview.	✓	✓	✓	✓
<b>Integrate HotDocs with Other Applications You Use Each Day</b>				
Store HotDocs templates and run HotDocs from your network server.	✓	✓	✓	✓
Integrate with Document Management Systems from companies like Interwoven and Hummingbird.	✓	✓	✓	✓
Integrate with case management systems like Time Matters™, Case Master, AbacusLaw, Amicus Attorney, Elite Encompass, JustWare, Practice Manager, LawBase, ProLaw, and others.	✓	✓	✓	✓