Quick Start Guide

Provided by The Nebraska State Bar Association
www.nebdocs.net

Table Of Contents:

Technical Support:

Technical Support is available to help you install and use NebDocs. Technical support is contracted with The Iowa State Bar's Computer Services Department. If you are having difficulties installing or using the software contact us at the following:

Internet	www.nebdocs.net
Email Support	support@NebDocs.net
Support Phone	(877) 243-3179
Subscription Questions	(402) 475-7091

Support is available from 9:00 A.M. to 3:00 P.M. Central Standard Time, Monday through Friday. To expedite your call, please be at your computer on which the program is running.

Assembling a NebDocs Form:

Display the Library

Double-click on the NebDocs shortcut on the desktop – OR -
Choose **HotDocs Player 10* > NebDocs 2013**** at the **Start/Programs menu**. The NebDocs library window appears.

To Assemble/Fill a document

1. At the NebDocs library window, select a template (Note: see "Finding a Form" below).
2. Click **Assemble**. The **Answer File** dialog box appears.
3. Select the type of answer file needed, then click **OK**.
4. If this is a new answer file then it is recommended that you save your answer file first. Go to File/Save Answers or click
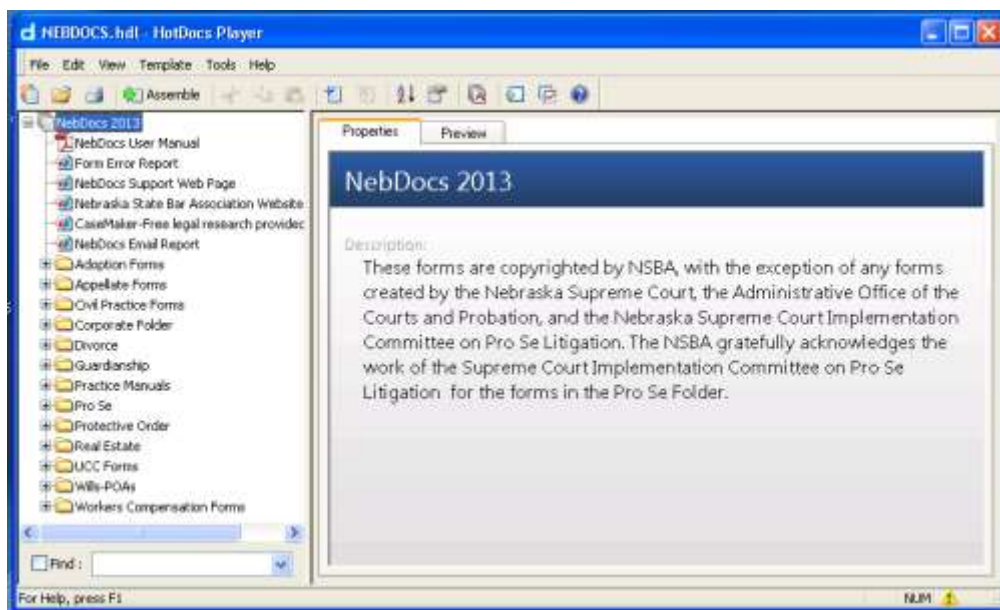
   on the 💾 Save Answers icon in the toolbar. To save often, simply click the icon or Ctrl+S.
   (Note: see "About Answer Files" section for more information Answer Files)
5. Answer the dialog questions in the "Interview Tab", then click **Next** to advance to each new dialog.
6. After the final dialog, the **End of Interview** dialog identifies how many questions haven't been answered. This dialog also provides options for working with the assembled document. For RTF forms you will send the document to your word processor where you can edit, save and print your form.

Finding a Form

You can use the "Find" feature in order to find a form in the library. All forms have a title which can be used to find forms. You can also search on form descriptions, also.

1. To use the find feature, have the NebDocs Library window open.
2. At the bottom left of the library screen, locate the Find dialog box, type in your text (i.e. deed)
3. A list will populate with forms that have that criteria.
4. During this search, the checkbox will be checked. To go back to the library window, uncheck this box.

*HotDocs Player 10 might also be HotDocs Player 11, or another version of Player – depends on what the NebDocs install is shipped with.
**NebDocs 2013 can change depending on the calendar year that was installed. For example: there has been NebDocs 2010, 2011 and 2012.

Saving and Printing a NebDocs Form:

Saving a RTF Form:
Once NebDocs displays an assembled document in your word processor, the document is a normal word processing document. You can manipulate this document just like any other word processing document. You may change your answer or standard document text. Any changes to your answers <u>will not</u> be saved in the answer file that you saved during the interview dialog, nor will any standard document text change within the template that you selected from the library listing in NebDocs.

Printing a RTF Form:
Once NebDocs displays an assembled document in your word processor, the document is a normal word processing document. You can print as you normally would print a word processing file.

Saving a HPT* Form:
Once you have completed the form interview the "End of Interview" options are a different than if the form was a word processing type of form. Once you save this type of form it can be edited with HotDocs Filler. Any changes made <u>will not</u> be saved in the answer file.

Printing a HPT* Form:
To print this type of form you can either print using the "Form Document" tab after the interview is completed. Or you can send (or open at a later time) the form in HotDocs Filler to print. Once you select Print you will see a typical print dialog box as you would in any other type of application that you would print from.

An HPT form is a graphical form that usually is a pre-formatted form. State and Federal forms are generally classified as a HPT forms because the state or federal government dictates the format and content of these forms. These forms cannot be saved or used as a word processing type form. In order to manipulate these forms you would need to use an answer file to recreate the form or use HotDocs Filler to open the form for editing purposes. Only answer fields can be changed on these forms

About Answer Files

When you assemble a document or fill a form, you can save the information you entered for the document or form (the "answers") in a HotDocs answer file. The answer file stores each answer along with the name of the variable that uses that answer. The answer file can be used again later to produce the same document or form without the need to answer the same questions again. You can also use the answer file to assemble documents and fill forms from other templates that use the same variables.

IMPORTANT: Answer files serve three main purposes: 1) they provide an efficient way to assemble multiple, similar forms quickly, 2) you can 'share' the answers for multiple users to access so others do not need to type the same information for a client, and 3) they provide a backup in case of computer or user malfunction.

The best way to organize your answer files depends largely on your type of practice. Some users create one answer file per client. Others create one answer file per matter. (This method is especially good when you have multiple matters per client that use the same forms, because it prevents the answers from the current matter from overwriting the answers from a different matter and the answers from a previous matter from getting used accidentally in the current matter.) Still other users combine the two methods, creating a pattern answer file for each client that contains basic client information, and then using the pattern file to copy the answers into a new file every time they start a new matter for the client.

Answer files have the filename extension .ANS (or .ANX) and are stored by default in the default answer file directory (<user>\My Documents\HotDocs\Answers). You can specify a different directory (shared or on a network to share answer files with others) when you create an answer file.

NOTE: All 3 of the above forms are using the same answer file.

Using an Existing Answer File

You can use an existing answer file to assemble a document or fill a form. You can save any changes you make to the answers in the file, or you can use the answer file but not save your changes.

To use an existing answer file

1. Open the template you would like to use.
2. At the Answer File dialog box, click on the Select Answer File button ( ).
3. Find the Answer File you want to use. Click on Open
4. Assemble the document or fill the form.

✎Tip
To reopen the last answer file you used, click on the drop down menu to select the previous answer files you have used.

You can select an answer file so that it can be used for all documents you assemble and forms you fill until you select another answer file. Check the "Remember Selected Answer File" box.

Save an Answer File During Assembly

You can save an answer file at any time while you are assembling a document.

To save an answer file during assembly

1. Go to the **File menu** and select **Save Answers As**… (use Save Answers if you have already saved the answers once before)
2. Give your answer file a file name (i.e. client last name, first name)
3. Hit your tab key – this will take you to the Title field – this will automatically put in your file name for you.
4. Click on **OK**

If you are using a new answer file, HotDocs opens an empty, untitled answer file. Give the answer file a name. If you are using an existing answer file, HotDocs saves the answers you have entered to that file.

Updating NebDocs

Notification of Template Updates

Automatic notification of updates via the internet. Your computer must be connected to the internet to receive updates. Note some network installations might not work correctly, please contact technical support for assistance.
(NOTE: this is done by having a HCAT File on your computer basically talk to our server for updates. The HCAT File is automatically installed on your computer. If you don't get a notice of updates and believe there are please visit www.nebdocs.net for more information on getting this file installed correctly)

1. Launch NebDocs.
2. Double-click on the flashing yellow icon in the lower right. If you do not see a flashing icon then there are no updates currently available.
3. List of updates will display.
4. Select the updates needed.
5. Click on "Continue".
6. Select "Overwrite All" (if prompted).
7. Click "Ok" at the successful screen

Keyboard Shortcuts and Keystroke for Symbols

Keyboard Shortcuts

Open	Ctrl+O
Close	Ctrl+F4
Save	Ctrl+S
Exit	Alt+F4
Undo	Ctrl+Z
Redo	Ctrl+Y
Cut	Ctrl+X or Shift+Delete
Copy	Ctrl+C or Ctrl+Insert
Paste	Ctrl+V or Shift + Insert
Delete	Del
Select All	Ctrl+A
Previous Page	Alt+PgUp
Next Page	Alt+PgDn
Go To Page	Ctrl+G
Fit Page to Width	Ctrl+H
Zoom In	F10
Zoom Out	F9

Keystrokes for Symbols

^{o} *(degree symbol)*	**Alt+0186**
¢	**Alt+0162**
§	**Alt+0167**
©	**Alt+0169**
®	**Alt+0174**
¶	**Alt+0182**
¼	**Alt+0188**
½	**Alt+0189**
¾	**Alt+0190**
™	**Alt+0153**
‰	**Alt+0137**