Starting a Document Automation Project: The HotDocs Component

So you have the forms that you want to automate, now what? Here are some next steps that we have come up with to help guide you in the process.

- Make sure that you really have all the forms that your end user will need to complete the task.
  - (Ex. cover sheet or a notice of service)
- Look at the form and highlight all the choices or answers that the end user will have to make or give you (Figure 1).

Figure 1: Sample highlighted form.

- Create a list of variables based off the highlighted areas. The variable list needs to contain all the answers that the end user will be giving you to complete the forms.
  - Use standard naming conventions. See [Appendix C of our A2J Authoring Guide](#) for more information on the community naming standards.
  - Ex. from Figure 1:
    - [Plaintiff name full TE]
    - [Defendent name full TE]
    - [Plaintiff is father or mother TF]

- Look for areas on the form that will need to be repeated or will need addendums. For example, does the form ask about the user's children (perfect for a repeat loop) or is there a limited amount of space on the form for information that looks like it will require more space (perfect for adding an addendum).

Figure 2: Spot of the sample form that will require a repeat loop.

Figure 3: Spot on the sample form that could require adding an addendum.

● Start automating the document by adding in variables from your list to the document.

Figure 4: Sample form with variables added to document. Variables are in blue.

- Add in the logic next. In Figure 5, the IF/ELSE expression is testing whether the user has said the Plaintiff is the father or the mother. If the user says the Plaintiff is the father, the variable [Plaintiff is father TF] will be "true" and the first box next to "father" will be checked. Otherwise (ELSE), the box next to "mother" will be checked on the final form. (The boxes will not display twice to the end user. This is just how the logic looks in HotDocs. Anything in green is ultimately hidden from the end user.)

A hearing for visitation was held in this case on the date listed above. Plaintiff was present. ☐ Defendant was present. ☐ Defendant was not present but was properly notified of the hearing.

At the hearing, the Court determined it has jurisdiction over the subject matter and the parties in this action. Venue is proper. Based on the evidence and testimony, the Court makes the following findings of fact:

1. Plaintiff is the «IF Plaintiff is father TF» ☑ Father/ ☐ Mother. «ELSE IF Plaintiff is father TF» ☐ Father/ ☑Mother. «END IF»

2. of the following child(ren) who are living with and in the care of Defendant:

Figure 5: Sample IF/ELSE logic for a true/false variable in an .rtf template.

- Test! Test! Test! Every time you finish a section, test it. It's easier to fix it as you go along, than to wait to test until the end and have big errors.

- Import your .cmp (HotDocs component file) into A2J Author and start creating your A2J Guided Interview.