

TIMESAVER LEGAL FORMS L.L.C

INSTALLATION INSTRUCTIONS, LICENSING INFORMATION, & GENERAL ADVICE

("When all else fails, read the instructions" is not good advice in this setting)

IN ORDER FOR THESE TEMPLATES TO WORK IT IS NECESSARY THAT YOU HAVE PREVIOUSLY INSTALLED HOT DOCS®, HOT DOCS® PDF ADVANTAGE AND MICROSOFT® WORD ON EACH COMPUTER THAT YOU INSTALL THESE TEMPLATES.

I. THE SAFEST METHOD IS TO FOLLOW THE INSTALLATION

INSTRUCTIONS FURNISHED BY HOT DOCS. However, if you are experienced operator and you haven't yet installed Hot Docs it has been our experience that it is more convenient to have all of your Hot Docs files contained in one file at a location that you can find easily. If you are capable of doing this without assistance it may an option you wish to consider. Otherwise you could **call Hot Docs® technical advice and have them walk you through a "Custom Installation" so that all the files are where you want them.**

II. Installation of TimeSaver™ Legal Forms L.L.C. Libraries and Templates

A. Installation on a Single Computer System

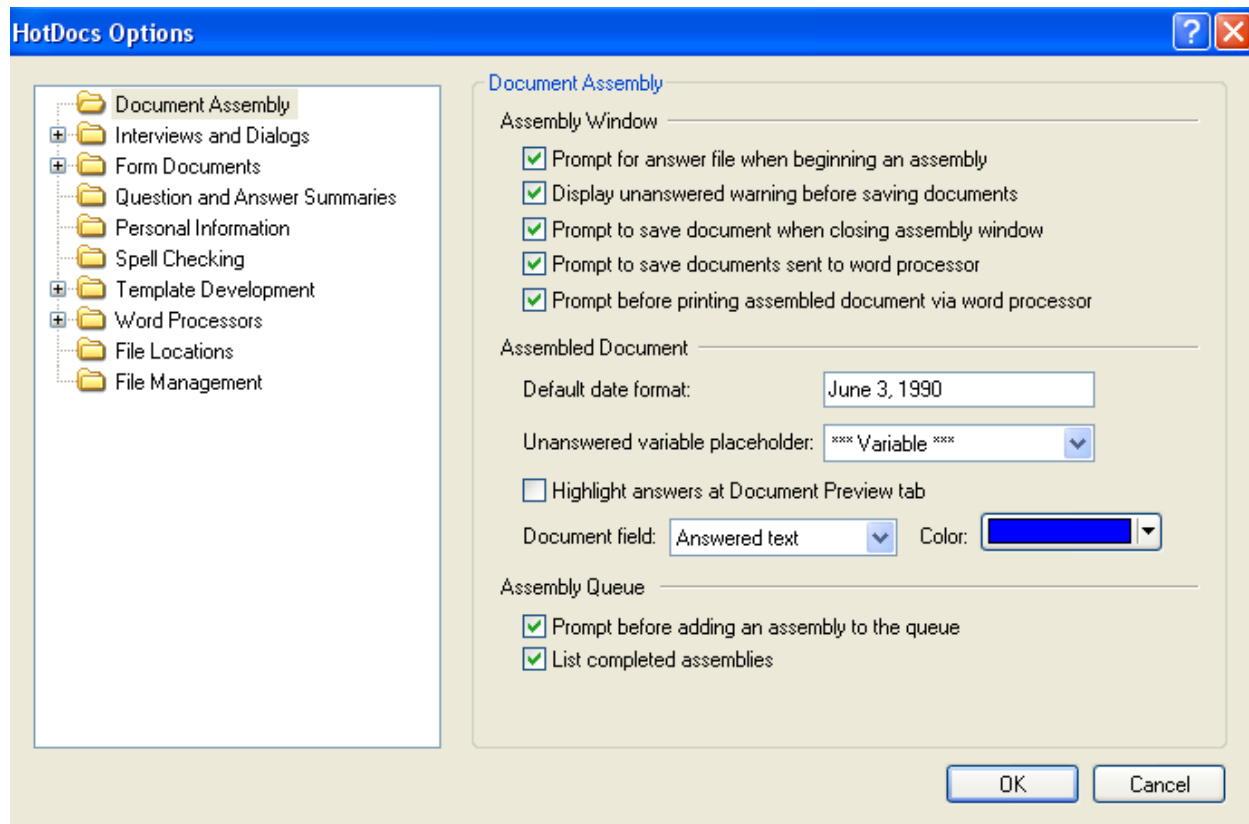
1. Insert the disc in the computer. Double click the icon that appears for the templates. Answer the prompts for installation.

B. Installation on a Windows® Networked Computer System

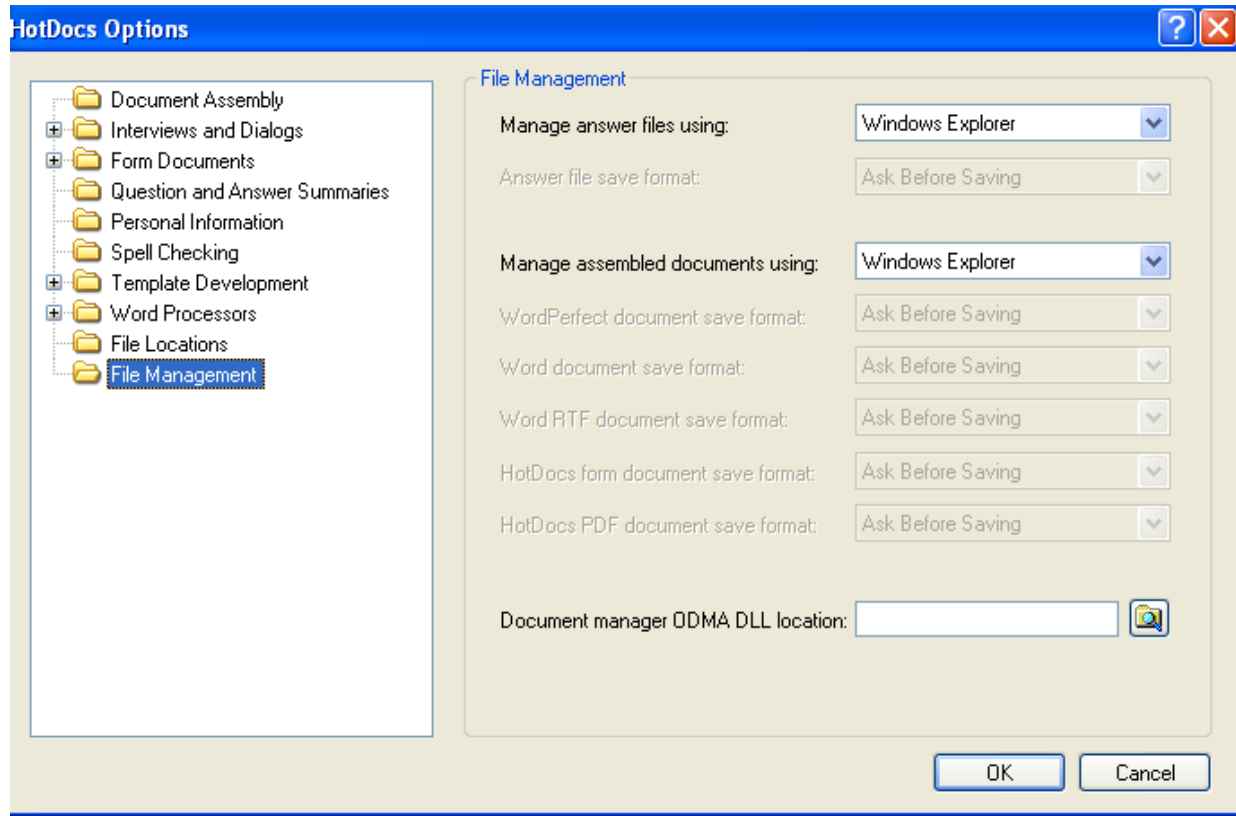
1. You will need to create a location on your server to store the templates and the answer files. Your system administrator should do this. The TimeSaver Legal Forms templates should then be stored in a such a folder. You will also need to create an "Answer File" on the server so that all answers can be shared by all users. Once this is accomplished the path for access to the templates and the answer files must be altered to direct Hot Docs to look to the files on the server where the templates are stored and the answers are stored. The following shows you how this is done however if your system administrator is not familiar with the process IT MIGHT BE BEST TO CALL HOT DOCS TECHNICAL SERVICE AND HAVE THEM WALK YOU THROUGH THE PROCESS.

****Developers Note: These templates were created using Hot Docs 2005 & 2006. The following screen shots are from Hot Docs 2005. Later versions of Hot Docs may be slightly different in some respects and so the screen shots may not be identical.**

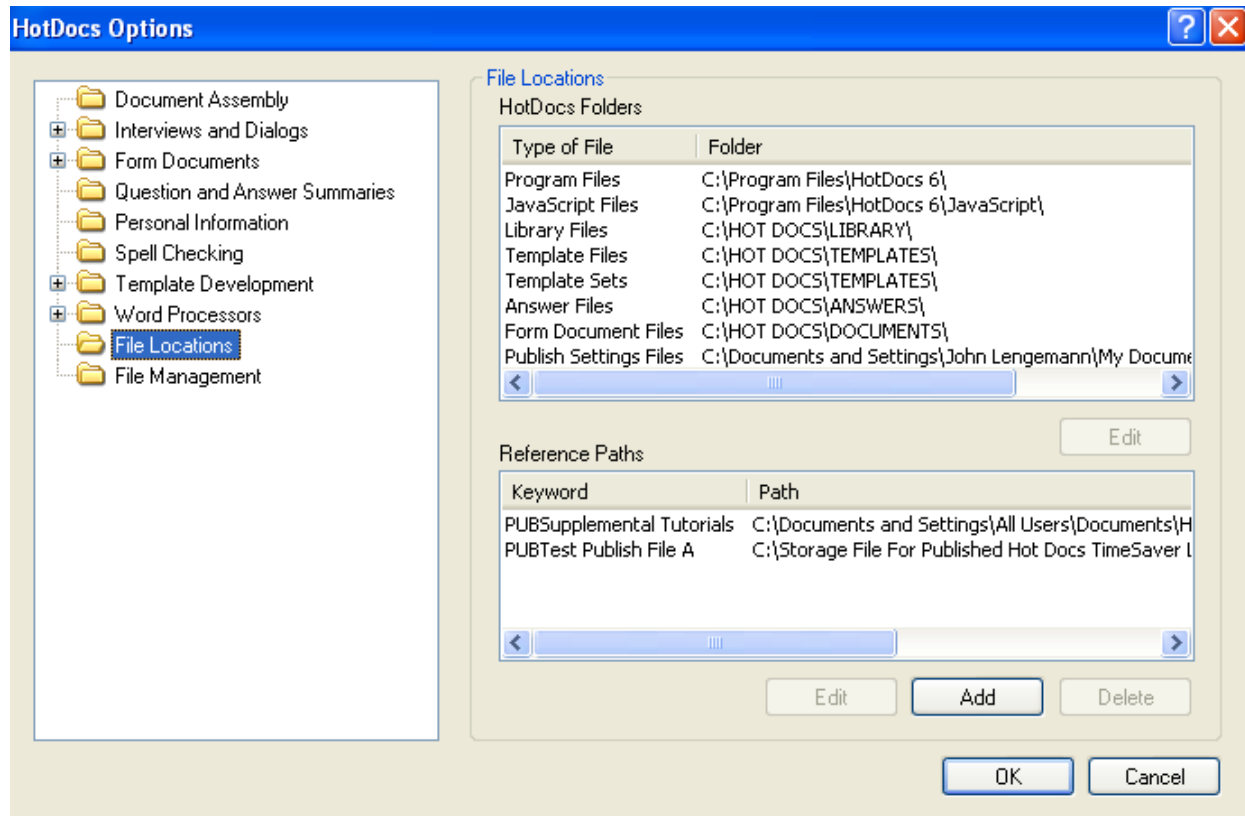
3. At each workstation in HotDocs®, select Tools/Options/Files Management. The screen should look similar to this:



Click on "File Management" folder and then from the drop down menu adjacent to "Manage answer files using" select "Windows Explorer." Your screen should look similar to the following:



Then depress the “OK” button. Then select Tools/Options/File Locations. (See the above screen shot. The folder for "File Locations" is just above the highlighted file for "File Management") Select “Answer Files” and click the Edit button. See screen shot below:



Using the HotDocs® browser that appears, locate the name of the folder on the server where common Answer files are to be located. Then depress the “OK” button.

4. Finally, at each workstation, open the library just installed. With the top folder in the library highlighted, select “Edit.” From the drop down menu select “Add Item.” Then using the browser that appears in the “Add Item Screen” Menu, (folder button second from the right) point to the location on the server (either as created in step 2 above, or at one of the workstations which is acting as the server) where the “pub” library is located for that library. Select “OK” twice and “Yes” to permanently change the file path for this library. Repeat this instruction for each library installed in each workstation.

II. Starting the HotDocs® Assembly Process

There are two ways to open HotDocs®. First, if you already have Microsoft® Word open, select the large red “D” on the Toolbar. The “D” was installed when HotDocs® was installed. This opens the HotDocs® program. The second alternative is to select HotDocs® from either the Desktop or from Program Files. Since it will be used frequently, it is recommended to put HotDocs® on the desktop if it is not already there.

After HotDocs® has been opened, to open the appropriate Library (if it is not already the default library when the HotDocs® is opened), select: “File,” “Open Library” and then the Library desired (it has a red “D” in the left corner of the file). After the library has been selected, then select one or more templates desired. You can also select the appropriate library from the most recently used list of libraries upon selecting “File.”

III. General Information

1. Before attempting to use TimeSaver™ Legal Forms L.L.C. Templates on an actual case, read these instructions and either the HotDocs® Installation Guide & Tutorial regarding assembling documents and/or the HotDocs® Help Guide (“Assemble Documents”), and utilize the tutorials provided. After becoming familiar with the assembly process, including the selection of multiple documents at the same time (using the CTRL & Shift keys), select various TimeSaver™ Legal Forms L.L.C. Software templates and practice assembling them. In this way you will become familiar with their content and their dialog structure, and the assembly process prior to being in a time crunch with a client in your office waiting for documents to review and sign.

2. An “Installation Guide and Tutorial is provided with the purchased version of HotDocs®. The only manual for HotDocs® is located in the Help directory.

3. Use and print the Divorce Intake Questionnaire form to gather information for use in creating a database of client information. The client could be asked to fill it out, or it can be used in a client interview. In addition to using this form to gather information, an individual Question Summary can be used for each template. To create a Question Summary, select and open one, or more, templates. Then select View, and check Question Summary Tab. Then select the Question Summary Tab on the tool bar, and then send it to the printer. Answer Summaries (for each document) can be similarly printed.

4. Except for the demo version, all TimeSaver™ Legal Forms L.L.C., Templates provided are modifiable. Every template can be modified (edited) to suit individual tastes in content or format. However, as per the licensing information provided, TimeSaver™ Legal Forms L.L.C. Templates and are not for re-use, resale, or to be copied to other computers or networks, unless appropriate site licenses are purchased from TimeSaver Legal Forms L.L.C.. If you do not

Editing can be accomplished in HotDocs® by selecting the Edit button. If edited in this way, all edits will become permanent.

Documents can also be edited after assembly in your work processor. In this way, only the assembled document is edited and the template remains untouched.

However, until you become proficient with HotDocs coding, do not attempt to modify any HotDocs® variables, dialogs, or repeats, or insert new ones. If you prefer, contact TimeSaver™ Legal Forms L.L.C. for a quote to modify or create templates for your office.

It is not necessary to understand how to create or edit templates in order to assemble the provided TimeSaver™ Legal Forms L.L.C. Demo Templates.

Modification of a TimeSaver™ Legal Forms L.L.C. template voids any warranty as to that template.

5.. TimeSaver™ Legal Forms L.L.C. templates© have been set up for use by one or more attorneys. Personal attorney information can be entered by selecting any one of the templates and then choosing the dialog entitled "Our Attorney Information." See the screen shot below:

Our Attorney Information

First name:
Middle:
Last:

Suffix:
Bar Number:


Firm name(If no firm name, leave blank):

Street address:

City:
State:
Zip:

Phone No:


To EDIT LIST or to SELECT FROM LIST, CLICK "SELECT" BUTTON



 **Select**

Click the "Select" button and you will see the following:

Select from Answer Source

	First name	Middle	Last	Suffix	Bar Number	Firm name(If no firm name, leave blank)
1	John	L.	Lengemann		P 16553	Morrice, Lengemann & Miller P.C.
2						
3						
4						
5						
6						
7						
8						
9						
10						



and then click "Edit Row" and the following screen will appear:

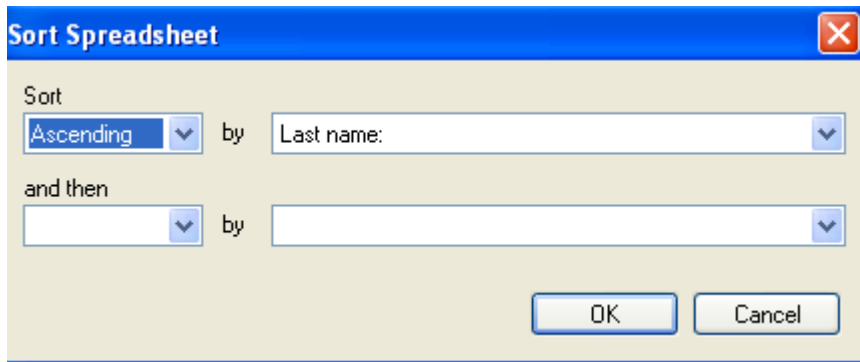
Then proceed to fill out the required information and repeat the process for as many attorneys as necessary. The second alternative is to update these variables when prompted during the HotDocs® assembly process.

TIP→ This same procedure can be used for several other dialogs for which you know some of the potential choices in advance. For example the attorneys you frequently find on the opposite side can have all of their information stored in a similar fashion. Likewise Notary Publics for your firm and the Judges you, or members of your firm, frequently appear before.

ADDITIONAL TIP→ You can alphabetize your lists of attorneys, as in the above setting, or other similar lists by simply placing your cursor in the column you wish to alphabetize and "RIGHT CLICK." In the following example the cursor was in the "Last name" column when the mouse was right clicked. Note that a "sort" button will appear:

	Last name:	First name:	Middle:	Suffix:	Bar Number:	Firm name (If no firm name, leave blank):
1	Dewey	Samuel	L.		P 44444	Dewey, Cheatem & Howe P.C.
2	Cheatem	Philip	P.		P55555	Dewey, Cheatem & Howe P.C.
3	Howe	Sort	Thomas	A.	66666	Dewey, Cheatem, & Howe P.C.
4						
5						
6						
7						
8						
9						
10						

Click on the "Sort" button and the following will appear:



Then select the method by which you wish to sort. The above will alphabetize by last name.

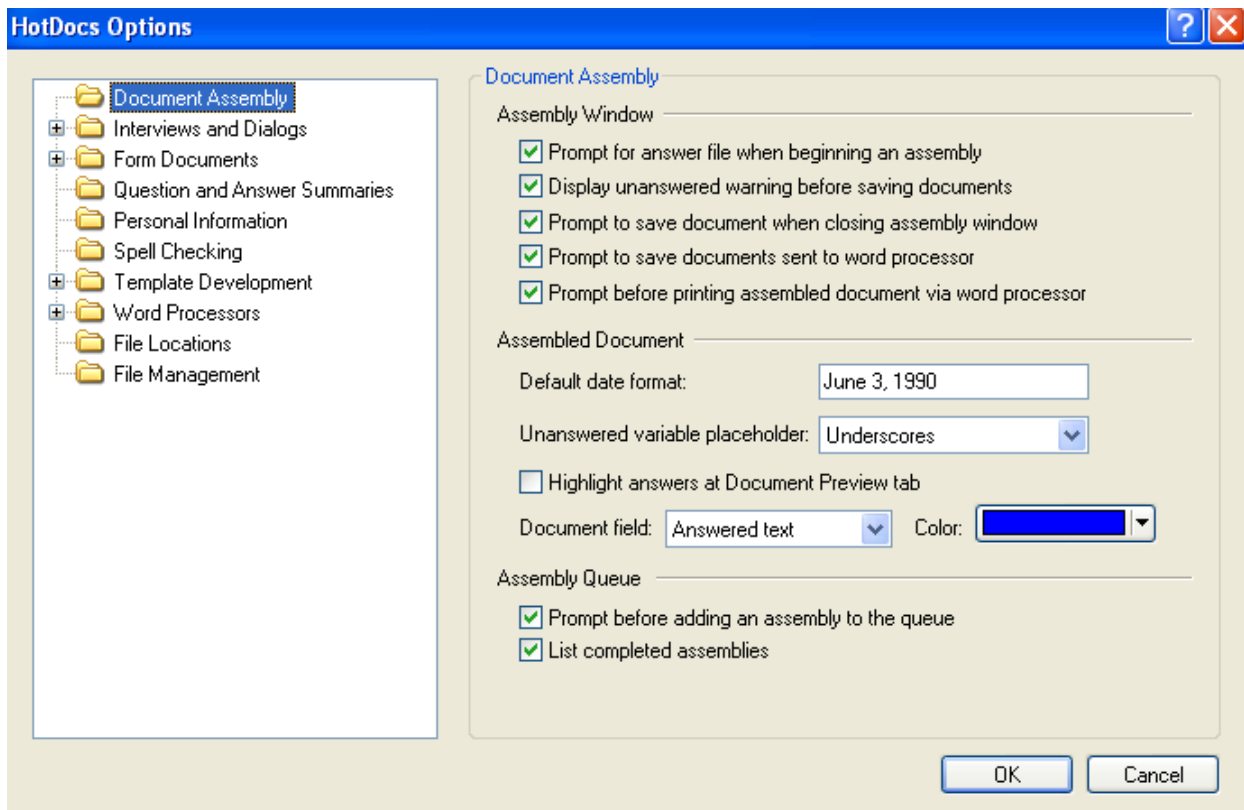
6. After a document is assembled, it can be printed and saved as any word processing document. It is not recommended to save assembled documents in the same folder where the TimeSaver™ Legal Forms L.L.C. templates or HotDocs® are located. After each individual or group of templates are assembled for an individual client, save that client's information in an Answer File for that client. Select that Answer file for later forms or pleadings needed for that client.

7. To be familiar with the content and options available in each TimeSaver™ Legal Forms L.L.C. Template, prior to assembling the first template for a client, it is recommended that all templates be printed and organized in a notebook

8. TimeSaver™ Legal Forms L.L.C. templates are arranged in alphabetical order. In HotDocs®, all templates can be copied and pasted to other libraries or moved to other locations in the same library (or deleted).

9. To speed up the assembly process, un-depress the "Instant Update" lightning symbol on the toolbar. This stops updating the answer file with every TAB press.

10. If you click on "Tools" on the Hot Docs® tool bar and then select "Options", HotDocs® provides several alternatives when variables are not answered. See the screen shot below:



If you click on the highlighted folder, "Document Assembly" the above screen shot is what appears. There is a drop down menu for "Unanswered variable placeholders" which gives several options for what will appear in an assembled template if a variable is left unanswered. In most cases TimeSaver™ Legal Forms L.L.C. templates uses the selection above, "underscores." (It is common that some variables in the TimeSaver™ Legal Forms L.L.C. templates will intentionally not be answered since the information will not be known or relevant.) In some cases when assembly is complete you will be warned that there are unanswered questions. You can click where indicated to view the unanswered variable but it may be a variable that you did not intend to answer. As you become more familiar with using the templates you will know whether you missed a variable or intentionally left it unanswered. One alternative is for HotDocs® to mark each unanswered variable in the assembled document. There are several alternatives available on how each unanswered variable is marked. The other alternative is not to have such places marked. As a safety measure to make sure all necessary variables have been answered, it is a good idea to allow HotDocs® to mark those unanswered variable locations. However, for editing speed, not marking them is (much) quicker, but this alternative is only recommended for experienced users. In most cases, TimeSaver™ Legal Forms L.L.C. templates use the name of the "variable" to mark an unanswered variable. Some variables will have an "underscore" if the variable is unanswered. This was done intentionally to permit information to be inserted after the document is printed. An example might be the date the Court signs the order.

11. To prevent loss of information if the system crashes, it is a good idea to save client information periodically even before the end of the assembly process by selecting the "Save Answers" icon. In case of a system crash just re-start the process. As long as answers

have been saved, not much time should be lost. If HotDocs® or the TimeSaver™ Legal Forms L.L.C. templates become trashed, HotDocs® and/or the templates can be re-installed without difficulty. However, if templates have been edited or added, the new or edited templates should be backed up (both the “*.cmp” files and the “rtf” files for each template) so they can be reinstalled, if necessary.

12. HotDocs® provides several setup options in the Tools, Options directory. Read the HotDocs® Help information regarding these choices and then modify the default selections as appropriate.

11. TimeSaver™ Legal Forms L.L.C. Templates are only for use by Michigan lawyers, or their employees and under their supervision.

12. USER TIP-→ If starting a divorce or separate maintenance case where there are minor children it is advantageous to run whichever child support software program you have before you assemble any TimeSaver Legal Forms templates. You will need the following information to commence the case:

- a. Gross monthly income of each party**
- b. Net monthly income of each party**
- c. Percentage of uncovered medical expenses paid by support payor**
- d. Day care contribution by support payor**

IV. Specific Template Information

1. All TimeSaver™ Legal Forms L.L.C. Templates have been created with the use of dialogs (groups of related questions at a time). Also, many variables in a dialog will change, appear or disappear, depending on the answers to earlier variables. Variables can be either: Text, True/False, Multiple Choice, Date, or Numerical, and must be answered accordingly. When HotDocs® Repeats are used, answers to Repeated variables in a text document will expand the tables in the template in which they are located. Mathematical computations are also included, and are computed automatically without user input once the numbers are inserted, as the answers are sent to the word processor at the end of the Assembly process.

2. Most templates have been created using 1” margins right-left and top-bottom, if possible. Most templates have been created using a Times New Roman 12 font where possible. The fonts can be changed to any font you prefer by modifying the "styles" in Word but one must be familiar with this process.

3. Many TimeSaver™ Legal Forms L.L.C. templates make use of HotDocs® Repeats. Please read the HotDocs® Help file regarding Repeats before using the program. TimeSaver™ Legal Forms L.L.C. Repeats are set up as Spreadsheets or as a Repeated Series. Filling in each column and row with all the necessary information completes the Repeats using the Spreadsheet format. There is no limit to the number of answers that can be inserted into the Spreadsheet. Then, the table in the text template expands to fit in as many rows as necessary for each answer.

If a Repeat or other dialogue does not fit on the screen completely, use the right-left or up-down arrows to view all the variables so they can be answered.

In some cases it was more constructive to set up Repeats in a Repeated Series format. Repeated Series Repeats look different than Spreadsheet Repeats, but work the same way in that the resulting table will expand to fit in as much information as has been

inserted. The answers on each dialog page in a Repeated Series operate like answer rows in a Spreadsheet. However, the difference is that, if the responses in a Repeated Series are more than one, the user must go to the next page of the Repeated Series by hitting the "Next" button at the bottom of the page or striking the "Enter" key, rather than selecting the Dialog list on the left side of the page. See the following screen shot of a "Repeat Dialog."

1: Children Information

This is a "REPEATING DIALOG." Click "Next" at the bottom of dialog to enter additional child information.

FIRST CHILD'S INFORMATION

Child name:

Social Security Number: Date of birth: Enter like this---->09/07/1941 or use calendar

Child Street Address

Child City Child State Child Zip Code

Navigation:

The user should complete as many pages as necessary (e.g. 3 pages if there are 3 children in the "Children Information" repeat). When the last page of the Repeat is unanswered (i.e. no more children), the next new dialog will then appear when the "Next" button is selected. In all Repeated Series dialogs you will see the following language: "THIS IS A "REPEATING DIALOG." CLICK ON "NEXT" AT THE BOTTOM OF THE DIALOG TO ENTER ADDITIONAL INFORMATION."

4. Many of the templates can be used in pre-judgment and post judgment matters.

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Valuable HotDocs® information and free advice is available at the following web sites:

1. www.hotdocs.com;

There is also a HotDocs® list serve which provides valuable technical help and can be joined at www.hotdocs.com.

VI. HotDocs® Assembly Instructions

It is recommended that all users carefully review all the instructions provided with the Hot Docs® software and utilize each tutorial that comes with the software as well as those additional tutorials available as downloads from the Hot Docs® web site.

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