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Automate Your Documents

Whitepaper by Seth Rowland

Document automation software and Web services reduce the repetitive, time-consuming aspects of creating legal documents and forms. They empower you to produce them **more profitably** and **more accurately**.

Here we review:

- Why bother automating documents and forms

- What it takes to assemble a document

- Desktop Applications: XpressDox, HotDocs, Pathagoras

- Web Applications: XpressDox, WhichDraft, Contract Express

Why Bother Automating Documents and Forms?

Form-filling software saves time, tedium and typo's when completing fillable PDF documents and webpage forms.

By automating your documents you minimize the risk of the time-honored "Save As" approach to creating a new document for a client. Common and embarrassing problems can arise from opening an old document from a another client and using "Save As" to make a similar document.

- If you use "Save As" you can:

- Fail to delete information that identifies another client in an old document;

- Fail to insert the current client's name where it should be;

- Fail to update an out-of-date client address;

- Run into trouble with Search and Replace, replacing too little or too much;

- Overlook choices or provisions that are needed for your current client;

- Leave in provisions that don't fit your current client.

An automated document template cannot guarantee a perfect result. But it can seriously reduce these risks. It can make the task less time-consuming, more accurate and less draining.

What Does It Take to Assemble a Document?

It takes just seconds or minutes to assemble a new client document from a template you have purchased or created. Typically you go through these steps:

1. Select a document template and a client or matter;

2. Go through Interview windows entering information and making choices;

3. Review and edit the assembled MS Word or WordPerfect document.

Assembling a document can takes just seconds if you link your document assembly application to your Practice Management software or other source of client information. The link spares you from re-entering information you already have, such as names, addresses, birth dates, and more. Of course longer document templates that require you to supply more information and make choices take longer to produce. But these templates save you even more time than manual drafting traditional methods.

If you cannot link to a source of client information, typically you can save the client data entered in the interview windows for re-use when assembling more documents for the same client.

Desktop Apps

XpressDox Desktop – *Cheap and Powerful*

XpressDox(www.xpressdox.com) is the lowest-cost, document assembly software at $150 per user for a full featured, development license. It works with both MS Word documents (2003, 2007, 2010), text templates for scripting and HTML, and Adobe PDF. Optional outputs include Word XML format and PDF. The system can merge information from a traditional interview and answer file, as well as a wide range of other data sources, including, text files, MS Excel, Outlook, SQL Server and ODBC. It also has a linking client for Salesforce.com that allows you to use a single record ID to bring in a wealth information. You will find few features missing from this comprehensive product. It's "relevance engine" takes a lot of the guess work out of building document assembly interviews by automatically presenting only those questions required for the interview.

HotDocs – *The Traditional Choice*

The document automation software best known to lawyers is HotDocs (www.hotdocs.com). The product has long been a product leader in the solo and small firm market. With a change in management, HotDocs Corporation now depends on its resellers and partners to sell into and support the small firm market. A sizeable consultant network continues to exist for those currently using HotDocs or interested in using it. Most new development, however, has been focused on HotDocs Server, which runs as a web-service and considerably higher prices.

HotDocs offers 2 approaches to automation. The "Document Modeler" allows the author to use simple square-bracket markup for fields and optional text in a Word document to create quick-and-dirty templates. Most users, however, opt to use the component file to create variables and scripted dialogs, as well as computations to handle complex text and number calculations.

If only an easy-to-learn edition were offered at a low annual fee, with pay-as-you-go technical support, HotDocs would be more attractive to smaller offices. HotDocs Developer Lite ($500) or HotDocs Developer ($800) is required to create document templates. Other users in the office who just need to assembly documents need the HotDocs User license ($300).

Pathagoras – *Innovative Clause Manager with Fields*

Pathagoras takes a wonderfully innovative approach to automating the production of documents. (The name honors Pythagoras, said to be the first self-identified philosopher, meaning "lover of wisdom.") It offers a different approach to document assembly. The product reflects the developer's devotion to responding to user requests, offering a variety or refined options for working with documents.

Pathagoras responds to the many ways that lawyers think about and work with documents. It simplifies the process of inserting variables into document templates and working with phrases, clauses and paragraphs.

The user interface for most important and basic features of Pathagoras is very good. For more advantage features the interface can be quite "techie," but then if you are diving deeply into the program you, too, are pretty techie.

Burn-out can interfere with producing a good-sized collection of automated documents using any document assembly applicaton. The lawyer or paralegal gets only so far with the project and then finds it hard to find time for then next round of legal contracts, estate planning instruments, or the like.

But with Pathagoras, you can choose to master a few of its many, many features and find that it is relatively to get back into your automation project. On the other hand, if you try to learn and use too many of its features, you may be deterred by the amount of relearning you need to do to pick up where you left off.

The developer anticipated the potential difficulties of getting your arms around such a deep and broad product. You can follow the "Pathagoras 7-Day Plan" spending 15 minutes per day to become productive quickly and efficiently.

Pathagoras has a 90-day free trial - that is three times longer than the typical trial. So you really can learn the product as your schedule permits before making the decision to commit to Pathagoras for automating your documents.

Pricing for Pathagoras is $379 for the first user and $250 for added users.

Web Applications for Document Assembly

Most current desktop software has moved or will be moved to running in a Web browser. The process will continue for years due to limitations of Web-based

products and the length of the development and adoption cycles.

Advantages of Web apps

Main advantages spurring the adoption of Web apps are:

- No need to install and continually update software on your computer

- Use the application anywhere on almost any device

- No hassles when you replace your computer

- Simplicity and consistency of using a Web interface

- Centralized upgrading, maintenance and backup

- Options for sharing information and output more easily

Of course not all Web applications deliver all of these benefits. Important stumbling blocks are the fears about losing work product and unavailability at just the wrong time. A few hybrid applications have appeared that offer the advantage of being Web-based and the security of an offline fall-back application and redundant local backup.

Attractions of Web Apps for Lawyers

Document assembly on the Web has its own particular attractions. Lawyers can offer secure client webpages where clients can provide information and retrieve documents confidentially. Offering client portals tends to make clients "sticky"; they like having a connection to their attorney and access to the work that you have done for them.

A classic desktop-based document assembly system does not offer the flexibility of allowing lawyers to use the system at home, on both PCs and Macs, on the road, and at a client site. However, remote access services such as GoToMyPC can work around that barrier.

XpressDox Server - Inexpensive Web app

XpressDox Server is the web counterpart of XpressDox desktop. Starting at $29/firm per month (not per user), it is by far the cheapest web-service out there. Authoring is done on the desktop via a Word plugin. The Ribbon allows you to connect to your sharespace on the XpressDox webserver.   You can post a single template or a whole folder of templates, which means you can use modular design in your templates. The powerful data connection tools work the same on the web as they do on the desktop. This means you can connect to an Excel file posted as a data source to your sharespace. It also means you can launch XpressDox template from Salesforce.com. XpressDox can also be incorporated in an e-Commerce solution where you sell document services over the web. Templates will run on any browser, including an iPad.

Contract Express – Enterprise Service at SAS Pricing

ContractExpress (contractexpress.com) from DealBuilder is prices at $199/user per month, with a discount for an annual prepayment. It brings to the solo practictioner the full power of DealBuilder webserver, which is otherwise available at substantially higher prices. The authoring tool installs as a Ribbon and Sidebar in Microsoft Word. Enter your webserver credentials and you are ready to create and post templates to the Web. ContractExpress is billed as a tool creating complex document assembly templates without consultant. That is because the author needs only to define his or her variables, and assign them to dialogs and sections. ContractExpress does the rest.

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