

LawNet 2002- LawNet U

Document Assembly and Data Integration Techniques

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Time Matters

GhostFill

Certified Consultant



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Agenda for Workshop

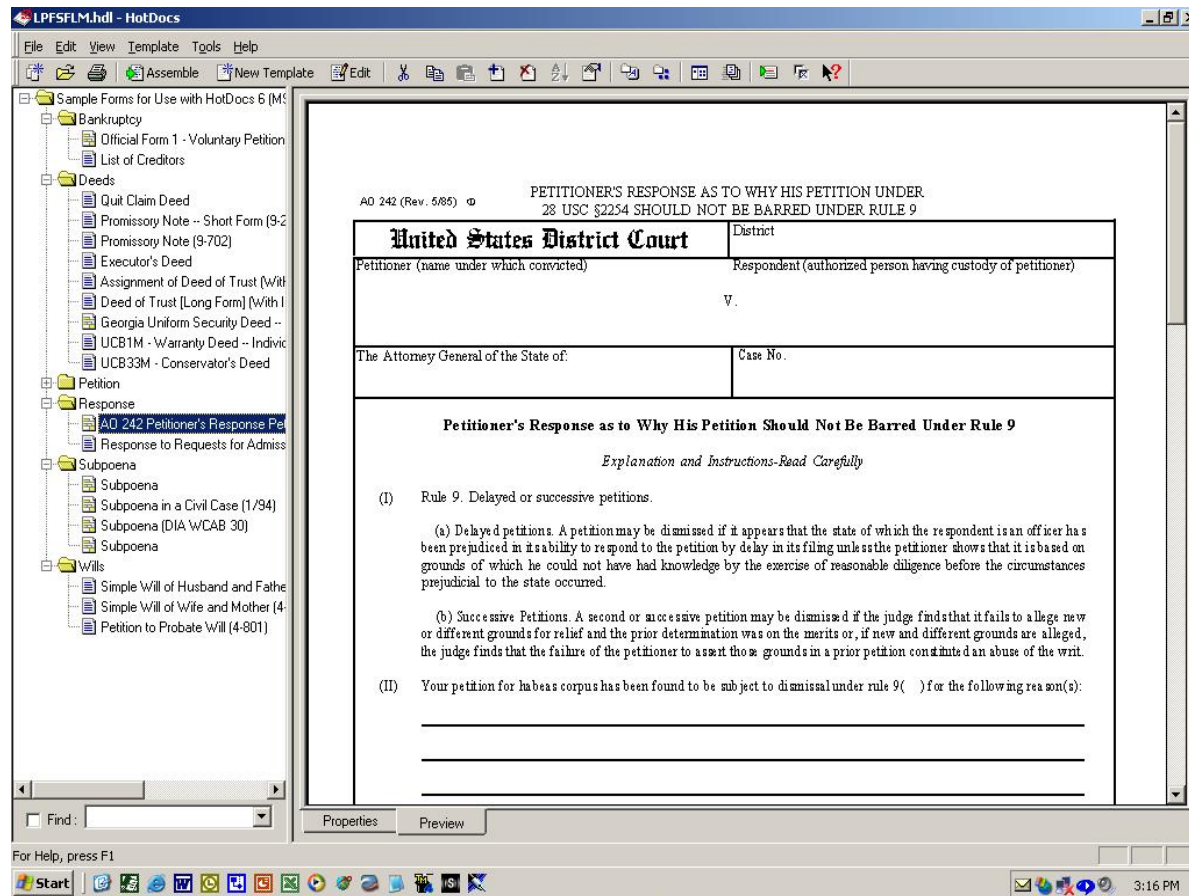
Lecture and other stuff....

- A Brief Word About HotDocs 6.0 Beta
- A Marriage Made In Heaven
 - Databases and Document Assembly
- Tricks of the Trade
 - Tools Every Wizard Must Have
- Roll-up Your Sleeves
 - Good Clean Fun in the Mud with HotDocs and GhostFill



HotDocs 6.0 Beta2

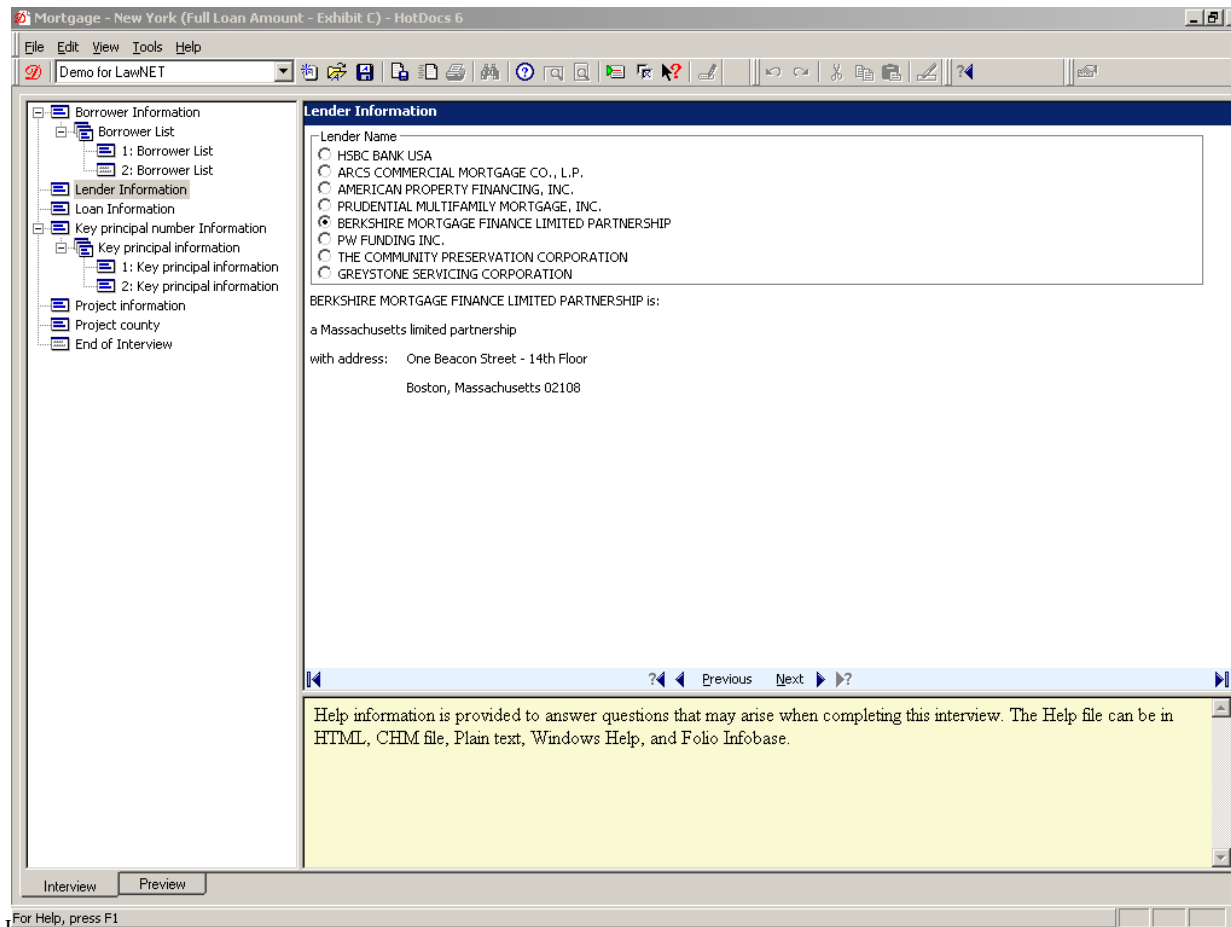
Power of Automator – Acceptability of PDF





HotDocs 6.0 Beta2

Entirely New Interview GUI





HotDocs 6.0 Beta2

New Approach to Collections (aka Repeats)

Mortgage - New York (Full Loan Amount - Exhibit C) - HotDocs 6

File Edit View Tools Help

Untitled

Borrower Information

- Borrower List
 - 1: Borrower List
 - New Borrower List
- Lender Information
- Loan Information
- Key principal number Information
 - Key principal information
 - New Key principal information
- Project information
- End of Interview

Borrower List

Borrower Entity type: limited liability company
Borrower Entity State: HI

Borrower name: John Doe

Borrower Street: 234 Main Street

Borrower city: Maui
Borrower state: HI
Borrower Zip Code:

Please type BORROWER NAME, BORROWER ENTITY STATE and BORROWER ENTITY TYPE the way it should appear in the signature block.
{For Example: HSBC BANK USA, a New York corporation}

Borrower signatory name:

Borrower signatory title:

Previous Next

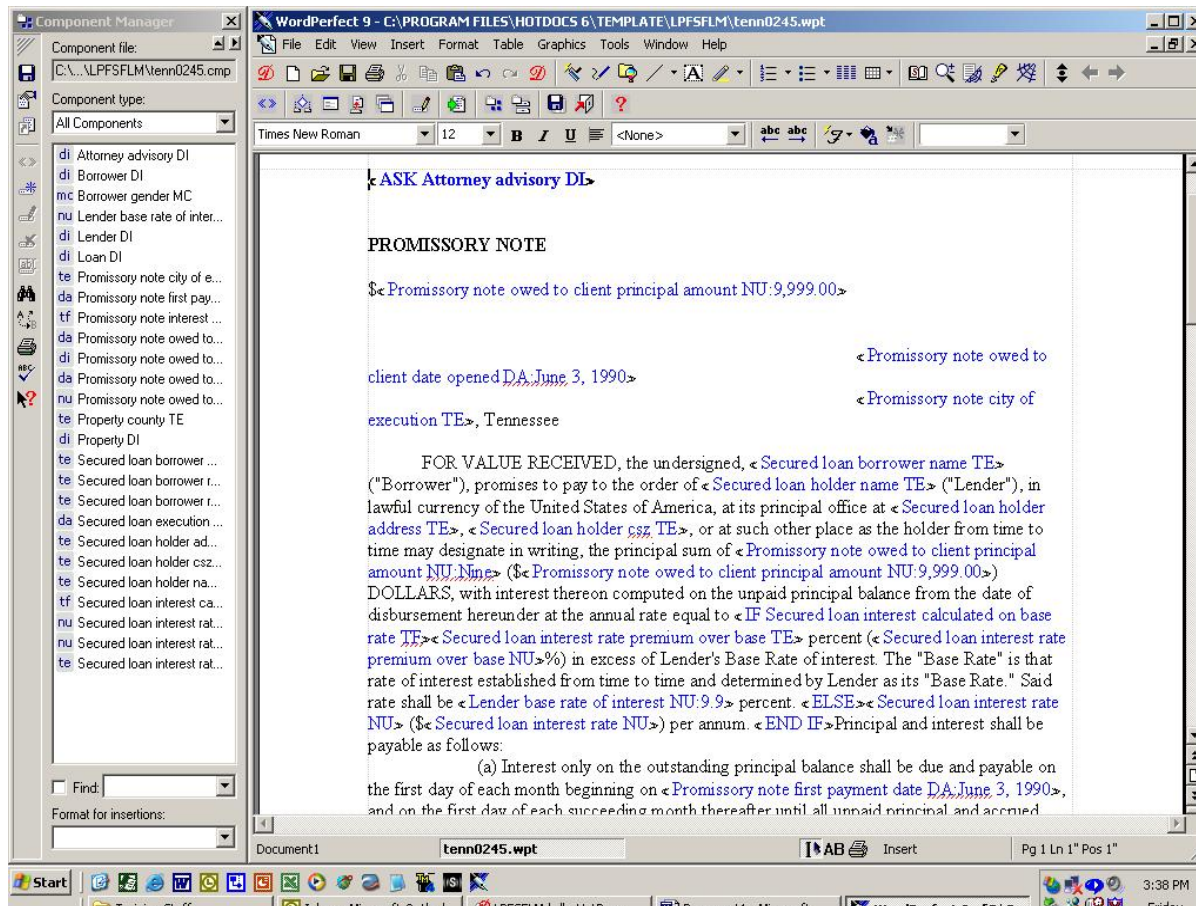
Interview Preview Question Summary Answer Summary

Start 3:31 PM



HotDocs 6.0 Beta2

Dockable Component File Manager





HotDocs 6.0 Beta2

New Testing Environment

The screenshot displays the HotDocs 6.0 Beta2 testing environment. On the left is the Component Manager window, showing a list of components for a promissory note form, including fields like 'Attorney advisory DI', 'Borrower DI', 'Lender DI', and 'Property county TE'. The main window shows the 'Promissory Note (9-702) - Michie's Tennessee Forms from LEXIS-NEXIS' form, which includes an 'ATTORNEY ADVISORY' section and a 'PROMISSORY NOTE' section. The 'PROMISSORY NOTE' section contains text such as 'The interest rate for this note is tied to the Lender's own "Base Rate" and is to be adjusted on a monthly basis...' and 'FOR VALUE RECEIVED, the undersigned, <Secured loan borrower name TE> ("Borrower"), promises to pay to the order of <Secured loan holder name TE> ("Lender"), in'. The bottom window shows a WordPerfect 9 document with the same text, demonstrating the integration between the form and the word processing application.



HotDocs 6.0 Beta2

Cross-Template Component Management

HotDocs Component Explorer

Template Name / Component File	Component Name	Component Type	Status
Demo Employment Agreement	co Author	Computation Variable	OK
Demo Agreement Clauses	te Author First Name	Text Variable	OK
Agreement Clauses	mc Author Gender	Multiple Choice Variable	Unused
clauses.cmp	di Author Information	Dialog	OK
Insurance Letter	te Author Last Name	Text Variable	OK
insulet.cmp	te Author Name	Text Variable	OK
Contract Report	nu Author Pay	Number Variable	Unused
Invoice	cl Authority	Clause	OK
invoice.cmp	co Beneficiaries Table Wizard	Computation Variable	Unused
Collection Letter	di Beneficiary Information	Dialog	OK
Publishing Contract	te Beneficiary Name	Text Variable	OK
Employee Review Letter	te Beneficiary Phone	Text Variable	OK
review.cmp	te Billing Name and Address	Text Variable	OK
Editor/Author List	di Book Information	Dialog	OK
Life Insurance Application	te Book Title	Text Variable	OK
Agreement Clauses	te Brief Plot Description	Text Variable	OK
Insurance Letter	te Brief Plot Description	Text Variable	Unused
Contract Report	te City	Text Variable	OK
Invoice	te Collection Agency Address	Text Variable	OK
Collection Letter	te Collection Agency Name	Text Variable	OK
Publishing Contract	te Collection Agency Phone	Text Variable	OK
Employee Review Letter	te Company Address	Text Variable	OK
Editor/Author List	te Company Name	Text Variable	OK
Sample Sales Agreement (DOT)	mc Company Representative	Multiple Choice Variable	OK
Sample Sales Agreement (RTF)	te Contact Name	Text Variable	OK
	da Contract Date	Date Variable	OK
	nu Coverage Amount	Number Variable	OK
	di Customer Information	Dialog	OK
	te Customer Order #	Text Variable	OK
	da Date Completed	Date Variable	OK
	da Date Shipped	Date Variable	OK
	tf Diabetes	True/False Variable	OK
	nu Earnest Money	Number Variable	OK
	te Editor First Name	Text Variable	OK
	di Editor Information	Dialog	OK
	te Editor Last Name	Text Variable	OK
	te Employee Address	Text Variable	OK

c:\documents and settings\juleexr5\application data\microsoft\templates\hotdocs 6\collect.rtf 1 of 26 files selected 159 unique components



Marriage Made in Heaven

Why are databases important for Document Assembly?

Source of Data
Data Collection Forms
Workflow Integration



Marriage Made in Heaven

Data Sources You Might Use

- Outlook Contacts (GhostFill)
- Corel Address book (HotDocs)
- Access Database (GhostFill & HotDocs)
- Excel Worksheet (GhostFill & HotDocs)
- Case Managers (Time Matters, Amicus, Abacus, ProLaw, STI Case Master)
- Billing program (TimeSlips, TABS, Elite, Carpe Diem)



Marriage Made in Heaven

Data Collection Makes Possible

- Answer files akin to a mini-matter database (GhostFill & HotDocs)
- Depth & quality of data
- Management of answer files
- Analysis of answer data
- Aggregation of answer detail
- Development of clause bank



Marriage Made in Heaven

Part of the Workflow

- Stream of client & transactional data
- DataCentric vs. DocuCentric
(e-Cognita & Lexicon)
- Access Database from Templates
- Access Templates from Database
- The HOLY GRAIL (live docvariables)
(ThinkDocs, SmartWords, Rapidocs, ActiveDocs)



Marriage Made in Heaven

Real Tangible Benefits

- Quality of the data
 - Consistent and Accurate Data
 - Lots a data
- Speed of Assembly
 - Data tables integrated into document with current data
 - Batch assembly in less time than it takes for a single interview
- Ability to report on the data
 - Better than Crystal Reports
 - Validated data



Tricks of the Trade

Real Tools for Real Wizards

Analysis Tools

Development Tools

Document Assembly Resources

Integration Tools

Project Management



Tricks of the Trade

Analysis Tools

- DeltaViews - successor to CompareRite
- Synergy - 3D document analysis with version control
- VCR - HotDocs variable component reader
- MS Excel variable mapping (DEMO)
- MS Access clause parsing database (DEMO)



Tricks of the Trade

Development Tools

- MS Excel - string concatenation to procreate Fillpoints & variables
- GoToMyPC to invite a friend to look over your shoulder
- Desktop Streaming to help a friend & share your expertise
- David Kiefer's Toolbar



Tricks of the Trade

Document Assembly Resources

- HotDocs

- Jim Garrison's Computation Archive
- HotDocs Technotes
- HotDocs ListServer
- David Kiefer's HotDocs Archive

- GhostFill

- GhostFill Knowledgebase
- GhostFill Sample Applications
- GhostFill ListServer



Tricks of the Trade

Integration Tools

- DDS-Link
- iMHot
- Native ODMA integration to
 - DocsOpen, iManage, Worldox
- Case Managers
 - Template field-mapping



Tricks of the Trade

A Word on Project Management

- An ounce of planning is worth a ton of redevelopment
- Develop data source & templates in tandem
- Naming Convention:
 - **GhostFill**: SourceTable.FieldNameTE
 - **HotDocs**: SOURCE FieldNameTE



Tricks of the Trade

A Word on Project Management

Microsoft Excel - Variables Spreadsheet.xls

File Edit View Insert Format Tools Data Window Help Send

Arial 10 B I U

D24 =

DIALOG NAME: _____						
Dialogue Prompt:			Dialogue Rules:			
##	Variable Name	Type	Prompt	Rules	Help	Notes

Variable Type Keys			
TE	Text variable	MC/Other	Multiple Choice allowing data
NU	Number variable	MC/None	Multiple Choice allowing choice of none of the above
DA	Date Variable	MC/Multi	Multiple Choice allowing selection of multiple options
CO	Computation	RPT	Repeat loop
TF	True/False Variable	.../Repeat	A text, number, date, or multiple choice variable which is to be repeated in a loop
MC	Multiple Choice	.../Word	Number or Date variable to be convert to words
TF/None	Group true/false and allow none as an option.	TF/Alt	Group true/false and allow only one true answer.

Variables Sheet2 Sheet3

Ready CAPS



Tricks of the Trade

A Word on Project Management

- Goals of any schema
 - Understood by Attorney
 - Usable by Programmer
 - Transferable across templates
- Styles
 - HD = Variable only, case sensitive, supports for spaces
 - GF = “Dialog.Variable”, no spaces, and case insensitive
- Naming Conventions
 - Dialog + VarName + VarType
 - Function + VarName + VarType
 - VarType + VarName
- My Approach
 - GF = “Dialog.VariableTYP”
 - HD = “DLG Variable TYP”
- Variable Suffixes
 - Text = TXT or TE
 - Multi Choice = MC
 - Number = NU or NUM
 - Memo = MEM
 - True/False = TF
 - Computed = CO
 - Dialog = DLG
 - Repeat = RPT



HotDocs Training Exercises

- Tenant Estoppel Letter
 - Create Database Link
 - Single Selection
 - Map lease and tenant info fields
 - Filter for all restaurant leases
- Collection Notice and Memo
 - Quick tour of template
 - Highlight computation filters
 - Launch DDS-Link Administrator
 - Open Database



GhostFill Training Exercises

- Letter with link to Outlook
 - Modify to support multiple addressees
- COM Integration to Excel
 - Change logic to address different cells
- Access Database Sample
 - Run & explain
- Clause Bank link to Database
 - Expose parameter passing
 - Expose scripting & dynamic collections
- Collection Notice and Memo
 - Redefine datalinks
 - Build filters & Clear Filters
 - Define counts



Open Forum for Questions



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