

Review: Exari 5.3: Browser-Based Document Assembly

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Exari 5.3

www.exari.com

TechnoScore: 4.3

1 = Lowest Possible Score;
5 = Highest Possible Score

You've heard of document assembly, and you've heard of cloud computing (Software as a Service). And maybe you've even heard about Web-based document assembly tools. But what about document assembly in your own private cloud? That's what Exari offers law firms that want an on-site solution with minimal software setup. How well does Exari work? Read document assembly expert Seth Rowland's exhaustive review in this TechnoFeature to find out. Seth doesn't just review Exari, but he also explains how to calculate the return on investment for your firm.

INTRODUCTION: WHAT IS ONLINE DOCUMENT ASSEMBLY?

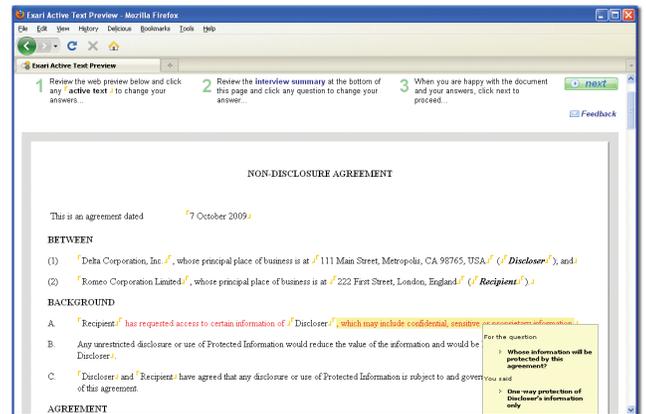
Every document created by a law firm or legal department is "assembled" as the product of a discrete set of questions and answers used to guide the appropriate language for the document. Document assembly (1) codifies the questions, (2) structures the answers, and (3) rationalizes the outputs. By building a branching "decision-tree" out of hundreds of potential questions, an automated system can achieve the same (or better results) in a fraction of the time. (Read my [Document Assembly Beginner's Guide](#) for more background.)

Document assembly software has existed for decades. The software works with documents, which it calls "templates," and applies to those documents a markup language designed to include or exclude optional text and to merge in variable text. Typically, it requires a software installation on each desktop. You can then store templates locally on each PC or access them from a central shared network repository. You must configure, support, and regularly update each PC.

By contrast, online document assembly software only requires installation on a single server. Templates are "published" to a Web-server. No installation is required on any workstation other than a standard Web-browser. The Web server manages access to the templates, answer files, and assembled documents. You can use almost any device with a browser for Web-based interviews and to assemble documents. This flexibility and device independence makes online document assembly a cost-effective option for firms and corporations with a dispersed workforce needing access to a centralized document creation system.

WHAT IS EXARI?

The name Exari is derived from the Latin word *exaro* — to plow up; to dig up; to write on a wax tablet. That's a nice bit of trivia,



but the name, sadly, tells you little about the product, which was originally called SpeedLegal. Exari is a suite of products that together constitutes a comprehensive Web-based document assembly system.

- Exari Instant Author is a tool for quickly converting Word documents into Exari XML templates. It handles handles variables and simple conditional logic.
- Exari Power Author enables you to take templates created by Instant Author and add advanced logic, conditions and rules. It also enables you to build systems that share logic across multiple templates and access data from external data sources.
- Exari Engine is the software that interprets the templates and components, produces the dynamic interviews, and generates the resulting documents. The Engine includes a sophisticated inference engine that determines which questions are relevant and

the order in which to present those questions to the user.

- Exari Repository is the software that manages the templates, components, and data; it determines which versions are published and which versions are accessible to the end-user. It also stores assembled documents and the answer files used to create them.

WHAT THE PUBLIC SEES

In evaluating a document assembly system, one must look at what the user sees when he or she launches the document assembly interview. If the user's experience is "pleasant"; if the user can easily navigate the questions; if the user is guided to make the correct choices; and if the user can easily review and change his or her answers, then you can say that the system succeeds.

The Exari interview shines in each of these areas. The document assembly interview looks clean and professional. Optional variables appear as if by magic on the screen once the program determines they are relevant. Variables include prompts, help text, guidance, and default text. And because you are on a Web server and operating in a browser, you can embed links and other materials to provide a very rich user experience.

You can group variables into "pages" and into subgroups. Pages are presented in an order determined by "relevance", necessity, and manual priority. And so while the system "infers" a proper order, in the hands of an accomplished programmer, the interview can be scripted and structured.

At the end of the interview, Exari presents you with several optional outputs including Word and PDF.

The most interesting option is a document preview. You can see the document with variables and optional text indicated. In the preview screen, you can hover over text and see the "rule" or question that governs the inclusion of that text. You can then go to the question, change the answer, and regenerate the document in preview mode.

Exari adds a further output option that is unique in the document assembly industry. Called the Exari RoundTrip, it produces a Word document that can be negotiated and edited. When the negotiations are complete, the now edited document can be "re-imported" back into Exari. The negotiated changes are now "visible" in the assembled document preview and you can then "accept" or "reject" them. You can change the answers in the interview and you can regenerate the document with the new answers and the negotiated changes.

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OBJECTS & XML UNDER THE HOOD

Exari is different. Like other document assembly systems, you start with a "markup" language on standard Word documents. Like other systems, the markup in Exari denotes "variables" that are to

be filled in during assembly and also indicates optional text. There is also a collection of components that define various variables, questions, and dialogs used during the assembly. But the similarity ends there.

Exari is "object-oriented." Everything in Exari is an object. Each object has properties. Among these properties are conditions or rules tied to questions in a document assembly interview or data from a database. These objects and their properties are represented in an XML schema. The XML is both "open" and accessible through an XML editor designed by Exari and optimized for authoring automated templates.

Exari works with the "DOM" or document object model used by Microsoft Word. In this schema, each document is an object with basic properties. Documents are divided into sections that include page size, margins, border, and headers and footers. Sections are divided into paragraphs, which have formatting and numbering. Paragraphs are further divided into text segments or spans that may have character level formatting associated with them.

Exari Instant Author converts your document with markup into an XML object that extends the Word document object model:

- First, Exari exposes all attributes of each object in the document in a structured tree, no matter how granular, and makes them editable. This is a true "reveal codes."
- Second, Exari enables you to impose conditions on any object in the system. PowerAuthor shows you each element in the document, its type, a brief description,

and the named condition. You further have the ability to visualize the logic tree for any condition.

- Third, Exari extends the DOM with ParagraphGroups, which enables you to apply conditions to the group, manage the punctuation and wording for lists and sublists, and apply meta-data that describes the group of paragraphs.
- Exari also includes other extensions that cover inline text options, internal cross-references, numbering schemas, external clause libraries, and referenced templates.

MANAGING COMPONENTS

Exari has just about every feature you could imagine for a document assembly system. Variables and various other components, just like documents, are stored as XML objects. Exari has variables, conditions, repeats, calculations, conditional expressions, multiple choice questions, and user text questions. To the standard list, Exari adds smart phrases, blocks of text that are reusable in the template and may or may not contain conditions, variables, and logic.

Exari also supports database queries and external queries that enable the system to connect easily with server-based databases and any form of external data source. The system enables the external query to use information entered during the document assembly interview. The potential of this tool in a Web-based document assembly system cannot be understated.

Exari includes several other components that round it out as a robust and powerful programming language. These include the ability to define constants, the ability to create dynamic multiple choice ques-

tions, and a very impressive calculations editor. It would take you quite a while to exhaust the calculation options built into Exari, but if you did, the calculations are fully extensible.

You can create new calculation scripts and register them as objects used by the Exari calculations editor. You also have the ability to display all calculations in their native Javascript and edit them. This approach enables you to do in Exari anything that you could do in Javascript, but with full access to all variables and data in the Exari system. Basically, it is a system without limits.

STARTING WITH EXARI INSTANT AUTHOR

Most programmers learning Exari will start with Exari Instant Author. This is a great tool to build simple templates. To denote variables, you need to put a variable name in square brackets. Don't use spaces. Use capitalization to describe the variable uniquely, e.g [PartyRecipient] and [PartyRecipientAddress]. It's that simple.

For optional text, use square brackets to denote the beginning and end of the optional text. Just following the opening bracket, add the word "OPT" followed by the name of your optional variable set off with an asterisk, e.g [OPT *DisclosureNotice*, provided the Recipient gives notice prior to seven days prior to the disclosure]. If you want to denote Alternative Text, you would do the same as the optional text, but use the word "ALT".

When you "process" the template, it converts your Word document into an Exari XML template, and presents you a wizard that enables you to adjust the prompts for the questions for your interview. The template is then published to the server, where an administrator can

test the template and change the permissions to make it available to users.

Exari has just about every feature you could imagine for a document assembly system.

MOVING ONTO POWER AUTHOR

Power Author is true to its name. It is a powerful authoring environment. At first glance, the environment is overwhelming. I highly recommend working with a large screen or spanning the editor across two screens. There is a lot of information that can get obscured on a small screen.

When editing a template you can work in any of three views: (1) Structure View, (2) Document View, or (3) Logic view. The structure view is a collapsible outline of your entire document. It shows sections, paragraphs, and text segments; displays a description; and displays any condition. The document view displays your document with color codes indicating variables and conditional text. The Logic view shows you all the components associated with the template and enables you to add or edit items.

It takes a while to acclimate to navigating between document view, logic view, and structure view. Since everything is an object, get used to right-clicking on an item, and seeing available options. Exari supports complex conditional logic, but requires you to create a named component for each variation on a condition, calculation, or computation.

For complex templates, it is well advised to plan in advance what conditions you will need and to carefully develop a naming schema on what to call each item. There are some aspects to the logic view that could be improved. The functionality is there, but you will need to explore the system to find out how to accomplish the result you seek.

**In the proper setting,
Exari will pay for itself
in under three months
after full production.**

EXARI ENGINE & REPOSITORY

The Exari Engine is the tool that interprets the published templates and renders the dynamic interview. All variables are assigned to topics that correspond roughly to pages or dialogs in the Web interview. Any variable may have conditions. Further, a variable may be inside an optional paragraph. The Exari Engine “infers” from the template and then answers what Topics are relevant and on each Topic, which questions are relevant.

Exari goes beyond merely shipping an “interview engine.” It includes a full template management system with a stripped down document management system. Templates are authored in PowerAuthor or

InstantAuthor and published to a repository. You can then manage template versioning, as well as set authorizations and permissions to access templates.

WHEN TO USE EXARI

Exari is not cheap. It’s for law firms that need to produce the highest quality documents in the least amount of time. Once you include software and services, plan on spending at least \$75,000 for an Exari project.

Clearly, you’ll need to conduct a return on investment analysis. Look at the number of users who will use the system, the number of documents they will assemble, the location of the users, and the level of expertise among the users regarding the documents. In the proper setting, Exari will pay for itself in under three months after full production.

CONCLUSION: OVERALL RATING

On a scale of 1-5, with 5 as the highest, I would give Exari a TechnoScore score of 4.3 — the average of a 4.5 for power and flexibility, 4.5 for end user experience, and 4.0 for ease of use of the programming tools. Most features are one or two clicks away, but navigating those features effectively requires a good deal of skill and moxie.

EXARI’S RESPONSE

We invited Exari to respond to this *TechnoFeature*. The Exari Team responded as follows:

“Exari would like to thank the reviewer for such an in-depth and thorough review of our solution. We are particularly proud of the 4.5 TechnoScore rating of our end user experience. We have worked very hard over the last ten years to empower end users to create their own “self-service” contracts and documents based on templates created by their legal advisor. It is gratifying to see this work recognized. Although the documents we are usually automating or “assembling” tend to be quite complex, the Web-interview that the end user sees is designed to be intuitive and easy to use.

“One note: This review is of our current software version (5.3). Later this fall, we will be releasing a new version (5.4) with some new features that make it even easier to author, maintain and use complex documents. Exari’s Roundtripping feature will be enhanced as well, to further aid the negotiation process.

“We appreciate the excellent TechnoScore and welcome any questions or comments.”

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Seth Rowland, Esq. was named TechnoLawyer Consultant of the Year in 2002 for his contributions to TechnoLawyer on the subject of document assembly and law practice automation. He is a nationally known technologist whose company, Basha Systems LLC, has helped many law firms build customized practice management and workflow solutions. This spring he assisted the United States Department of Agriculture in implementing Exari to automate rural development loan package. Please feel free to [visit his blog](#) for the latest on document assembly and practice management.

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