

Basic Introduction to Document Automation

“Automated document assembly now is commonplace in law firms. Today, a lawyer, paralegal, secretary or do-it-yourselfer can work through a series of question-and-answer dialogs (or can pick forms and clauses from libraries of alternatives) guided by reference materials, and have the system automatically assemble a draft document. Sometimes, such an application is obtained from a vendor, which provides the benefits of automation with little effort and expense from the firm. Other times, an organization develops a custom system with a document assembly engine, using its own forms and experience. Although this can require a large investment, it can yield excellent returns.

These document assembly systems capture regularities underlying the documents, including which sections, paragraphs, sentences and words go where under what circumstances. The user is prompted to specify details such as names, numbers and dates, and instead of cutting and pasting information, the user picks options from lists. The user lets the computer do the work — there is no need to key in a lot of text or to fuss with formats.

Usually, a template is available that models a particular kind of document, with variables and instructions placed at locations that might change from case to case. Your responses are stored in an answer file. Typically, each answer file stores all data relevant to a matter and can be used to produce multiple documents. When answers are changed, they can be regenerated instantly.

Document assembly encompasses flexible editing of word processing documents and fixed-format documents, as well as “graphical” forms where the background is static. Information can be placed only in designated fields. In most document assembly applications, users provide information and make drafting decisions through a discrete interface in which questions are asked and advice is given. Many document assembly tools can be used to produce information-gathering modules, advisory systems and intelligent checklists. Also, a firm can make document assembly available to clients who then complete a computer-based questionnaire. The answer file goes to the legal professional for further review, revision and document drafting.”

From: Marc Lauritsen – [Fall in Line with Document Assembly: Applications to Change the Way You Practice](#) (A panoramic view of the document assembly landscape, as of early 2006. *From Law Office Computing*, February/March 2006.)

Basic introduction to document automation – Collection of Articles

Available at: <http://www.capstonepractice.com/articles/>

Basic introduction to document automation – Full Video

Available at: Marc Lauritsen, “Document Automation: An Overview” from CALI.org
<https://www.youtube.com/watch?v=1sCol4DDm78>