Legaltech® news
AUGUST 2015
An ALM Publication

PRODUCTS/SOFTWARE | TEST DRIVE

WORK PRODUCT REDUX WITH LEAFLET®

Automation is necessary to assemble documents efficiently and accurately.

BY SEAN DOHERTY

DOCUMENTS ARE LAWYERS' primary work products and can be reused to save law firms time and money. But if a law firm does not automate document production, documents can be inefficient to produce, and the text may contravene the firm's best practices. Without some document strategy, client document requests will fill lawyers' task lists and distract them from high-value work.

Document automation software saves lawyers time in creating documents that satisfy client requirements. Leaflet Corp.'s online, collaborative document automation system, called the Leaflet Platform, turns existing Microsoft Word documents into reusable templates that incorporate client requirements and law firm standard clauses.

Leaflet Platform users create templates by adding objects to Word documents. The objects are standard clauses that fulfill client requests and requirements, and elements that represent document variables, such as dates, amounts, names, and locations. Variable elements and clauses are associated with questions. The question answers instantiate template objects to satisfy client requirements. The list of questions for each template form an interview, called a Leaflet, can be stored online and completed on demand by clients or colleagues to create documents.

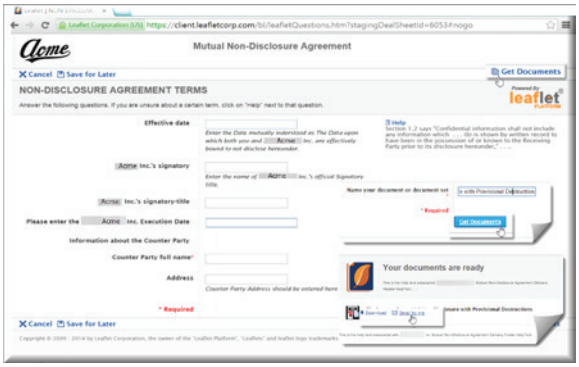
Leaflets come in two forms: self-service and collaborative. Self-service Leaflets are structured interviews that guide writers or dealmakers through matter-specific questions. When finished, one click generates a Word document.

Like self-service leaflets, collaborative leaflets guide drafters and dealmakers through structured interviews akin to a workflow. But instead of generating a completed document, the leaflets make deal or document drafts for clients, senior associates, and partners to review—inside the Leaflet Platform.

Leaflet's software as a service supports three versions: Personal, Professional and Publisher. With the Personal version, Leaflet automates industry standard forms, such as nondisclosure agreements and retainer agreements for users to draft documents in a Web browser.

In the Professional version, Leaflet automates law firm documents and, like the personal version, makes industry standard forms available. Professional users can automate and edit documents with colleagues using a Web browser or a local copy of Word that operates inside Microsoft's Internet Explorer.

Publisher users import law firm documents into the Leaflet Platform, and like the professional version, use a local copy of Word in IE to control automation and edit documents in a familiar interface.



Leaflet® Microsite™ hosts questionnaires, or "Leaflets," to share with clients, business teams, and colleagues on any browser and most mobile devices. Notice that abundant guide text is available for each question; questions can be organized into multiple pages; and generated documents can be downloaded or emailed in either PDF, Microsoft® Word, or both.

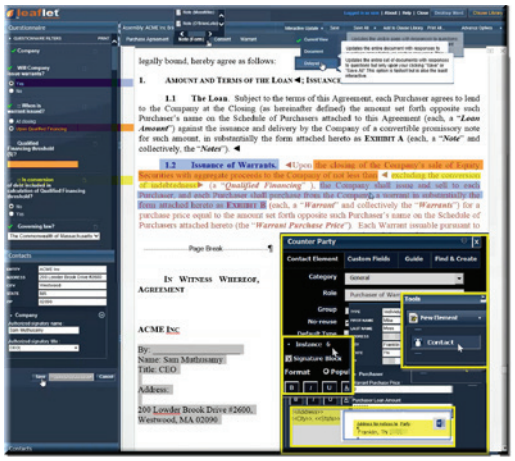
TO SHARE TEMPLATES WITH CLIENTS AND COLLEAGUES, I PUBLISHED THE QUESTIONNAIRES, OR LEAFLETS, TO THE MICROSITE OR PORTAL HOSTED BY LEAFLET. IN THE PUBLISHING PROCESS, I REARRANGED QUESTIONS AND SIMPLIFIED LEAFLETS BY PUBLISHING A SUBSET OF QUESTIONS.

TEST DRIVE

Leaflet set me up with a Publisher's license to test-drive the company's namesake software. I installed plug-ins to Internet Explorer and Office to use Word as a document editor inside IE. After logging in, I landed on the Document Manager (DM) page. The DM is Leaflet's hub to get local files in and out of the platform and provide access to Leaflet's document editor and template authoring tool.

The DM looks and feels like a two-pane Windows Explorer inside a browser. A left window pane displays a hierarchical folder structure to store documents and templates.

ERIC WESTBROOK



Leaflet® "Draft Live" environment allows simultaneous multi-document drafting and deeply-nested logic. Its role-based contacts and signature block functionality is simple to implement (see the overlayed logic in the yellow boxes, the signature line in the Word document, and the questionnaire text on the left). Notice also the role-based contacts and the logic of the signature block functionality. Especially powerful, the One form To Many (OTM) documents functionality, shows at the top menu bar along with the new 5.2 Interactive Update feature. NOTE: the coloring here merely highlights logic and is not a feature of the interface

When I selected a folder, the right windowpane listed the documents, templates, and other files in that folder.

I used the DM's import function to get Word documents into the system. I right-clicked a folder in the left windowpane and selected import. A dialog box opened, and I selected several documents from my local system to import into the Web platform. Besides Word, Leaflet can import Adobe Acrobat files, with or without Acrobat images, background text, legal pleadings, ruled lines, and hyperlinks.

The bulk of my work in Leaflet was done in the Document Editor. The DE imbeds a local copy of Word in IE and encapsulates it with Leaflet's automation controls in a ribbon above the Word Ribbon, which includes access to familiar editing features and Word add-ons I installed. Leaflet controls are slightly different depending on whether I constructed a template from a Word document, edited the Word doc, or assembled a template into a document.

TEMPLATE FACTORY

Leaflet relies on the answers to questionnaires to assemble documents from templates. I used Leaflet's Template Factory (TF) to create templates from Word documents with elements and clauses.

Elements are defined terms in templates used for dates, names, numbers, percentages, etc. Element values can change with each use of a template. Clauses are text selections of best-practice language used by the firm for documents and contracts. Clauses are stored in sets and can be added to templates to ensure that completed documents contain the requisite language to assert or preserve clients' rights.

I opened an engagement letter for my New York practice and added optional elements and clauses to create one engagement letter template for multiple jurisdictions. The letter opened in my local copy of Word, which was embedded in IE's right windowpane. The left windowpane served as document navigation, grouping elements, clauses, and questions in separate sections. One click on an object sent me to one or more instances of the object in the document.

A Tools dialog box or "Palette" is used to create document elements and clauses. I selected text or placed my cursor in my engagement letter where I wanted an element and clicked "New Element." A list appeared to select from preset elements for currency, date, text (255 character limit), number, duration, percent, and a check-box item. Depending on my selection, a dialog box appeared with options for the preset element. Leaflet gave me several options to display the date in the document, such as MM-DD-YYYY, and a check box if the date is the day the document is assembled.

I created a template from multiple engagement letters for California, New York, and Washington, D.C., residents. Elements included dates, client directory information, jurisdiction, matter types, and clause set describing the representation.

If the client answered a residency question by selecting "New York," the engagement letter contained clauses explaining a reasonable fee from DR 2-106 of the New York Lawyer's Code of Professional Responsibility and the right to arbitration in a fee dispute under Part 137 of the Rules of the Chief Administrator of the Courts. If the client resided in California, the letter informed the client whether or not I had malpractice insurance to cover the work under California Rules of Professional Conduct 3-401

As I added elements and clauses to the template, the changes were immediately reflected in the Word document. I saved the template and, in one click, verified the template could be assembled into a complete document by answering the questionnaire.

I clicked on the questionnaire tab in the left windowpane to access the list of questions associated with elements and clauses. When I answered the questions in the left pane, the right pane reflected the input to the document. When I finished the questionnaire, I saved the document as a new client engagement letter.

To share templates with clients and colleagues, I published the questionnaires, or leaflets, to the microsite or portal hosted by Leaflet. In the publishing process, I rearranged questions and simplified leaflets by publishing a subset of questions. The website listed the published leaflets as Web forms. When users answered all the questions in a form, the platform generated the underlying document and displayed it on screen or downloaded it to a PC to save and print.

Besides document automation, the Leaflet Platform supports a contract review operation to negotiate contracts. Leaflet's Playbook™ Factory automatically analyzes document text as input and outputs guidance and alternate provisions relevant to the input.

AS I ADDED ELEMENTS AND CLAUSES TO THE TEMPLATE, THE CHANGES WERE IMMEDIATELY REFLECTED IN THE WORD DOCUMENT. I SAVED THE TEMPLATE AND, IN ONE CLICK, VERIFIED THE TEMPLATE COULD BE ASSEMBLED INTO A COMPLETE DOCUMENT BY ANSWERING THE QUESTIONNAIRE.

PRICING

Leaflet Publisher licensing can start as low as $150 per user per month for template creation and document automation and can go up to $250 per user per month for a full-featured platform, including access to the portal for collaboration and the Playbook™ Factory. ■

leaflet® Corporation
collaborative document automation

Reprinted with permission from the August 2015 edition of LegalTech News. © 2015 ALM Media Properties, LLC. All rights reserved.
Further duplication without permission is prohibited. For information, contact 877-257-3382 or reprints@alm.com. #010-08-15-06