

OSB Professional Liability Fund presents

Document Automation: Don't Be Afraid of the Robots

Wednesday, March 16, 2022
10:00 am – 10:30 am

MCLE ID 86401
0.5 Practical Skills Credit

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PLF Practice Management Attorney

CLE Materials

- PowerPoint Slides
- Presentation Resources




Document Automation:
Don't Be Afraid of the Robots

Presented by:
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Practice Management Attorney
Oregon State Bar Professional Liability Fund

OSB Professional Liability Fund

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What is Document Automation? Use of software to simplify a task

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How can it be helpful?

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Document Automation Options


- Adobe Acrobat PDF fillable forms
- Microsoft Word built-in
- Standalone software
- Practice management software



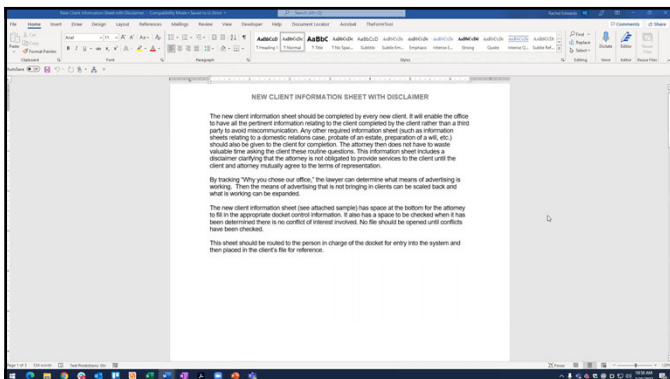
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Fillable Forms

- Good for intake questionnaires and gathering information
- Fillable in Word or PDF
- Steps depend on software



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NEW CLIENT INFORMATION SHEET WITH DISCLAIMER

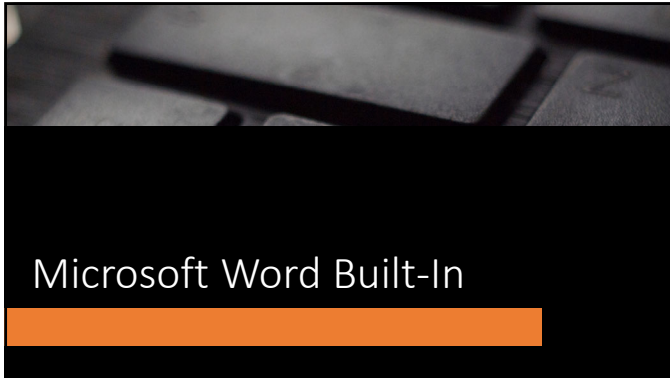
The new client information sheet should be completed by every new client. It will enable the office to have all the pertinent information relating to the client completed by the client rather than a third party to avoid miscommunication. Any other required information sheet such as information sheets relating to domestic violence cases, provider of an estate, preparation of a will, etc. should also be given to the client for completion. The attorney must do all that is feasible, valuable time asking the client these routine questions. This information sheet includes a disclaimer clarifying that the attorney is not obligated to provide services to the client until the client and attorney mutually agree to the terms of representation.

By tracking "Why you choose our office," the lawyer can determine what means of advertising is working. Then the means of advertising that is not bringing in clients can be scaled back and what is working can be expanded.

The new client information sheet (see attached sample) has space at the bottom for the attorney to fill in the appropriate client control information. It also has a space to be checked when it has been determined there is no conflict of interest involved. No file should be opened until conflicts have been checked.

This sheet should be routed to the person in charge of the docket for entry into the system and then placed in the client's file for reference.


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**Quick Parts
(Building Blocks)**


- Helpful for repetitive text
- Saves information for use later
- Can be used for words, clauses, pages of text
- Create building blocks and label them appropriately for easy access



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**Quick Parts
(Fields)**

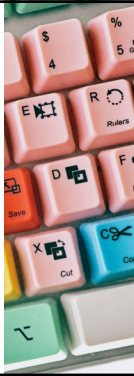
- Placeholders that store and display data using special codes
- Over 75 fields available in Word
- Can also create custom fields
- Entry of information prompts the code to product a result



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Macros

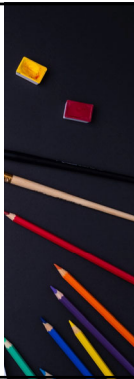
- Series of commands that can be saved within the document to shorten the process
- Records keystrokes and can be played back using a keyboard shortcut or icon



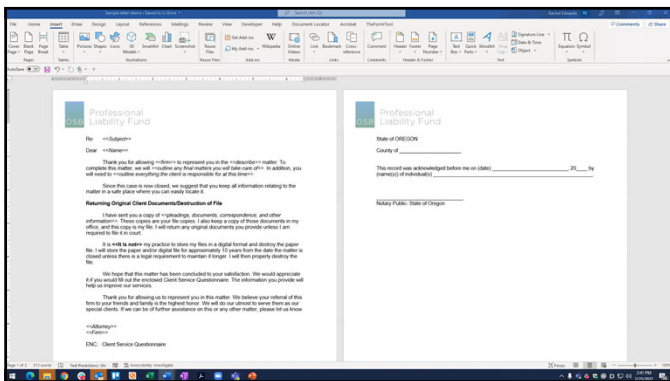
10

Templates

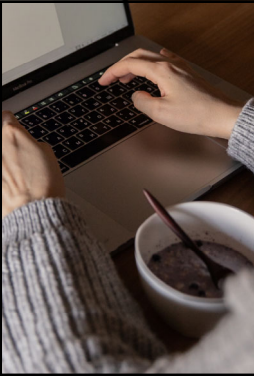
- Saves document-wide properties (e.g., margins, header/footer, styles)
- Can include Quick Parts and Macros
- Use templates for information that will not be changing (or needs to be updated using fields)




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Standalone Software


 TheFormTool
 Software company


 HOTdocs
automated document generation

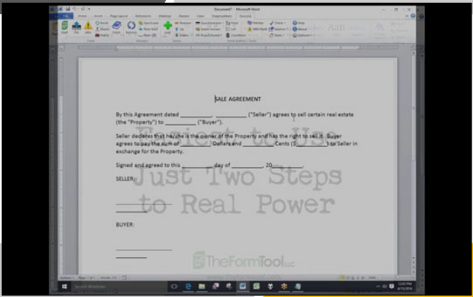






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TheFormTool



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Practice Management Software







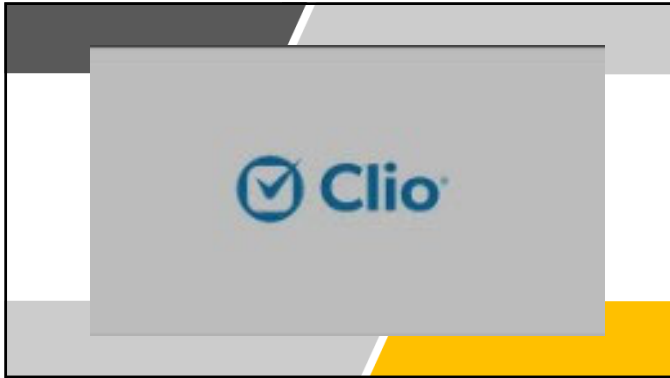









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Know Your Needs

- Office systems and procedures
- Type of document
- Word or PDF
- Number of fields
- Preferences



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Contact Us

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Presentation Resources

1. Creating fillable forms:

- a. Microsoft Word- <https://support.microsoft.com/en-us/office/create-forms-that-users-complete-or-print-in-word-040c5cc1-e309-445b-94ac-542f732c8c8b?ui=en-us&rs=en-us&ad=us>.
- b. Adobe Acrobat- <https://www.adobe.com/acrobat/resources/how-to-create-fillable-pdf.html>.
 - i. If it is not already saved as a PDF file, open a Word document or scan in a paper document and save it as a PDF. It is best to use a document that contains underlined spaces or blank spaces meant to be filled in so the program recognizes them as blank spaces.
 - ii. Click Tools, then Prepare Form.
 - iii. Create New, or select a file, like a Word document, or scan a document and Acrobat will analyze your document and automatically add form fields. You can then add form fields if you'd like.
 - iv. Click Start.
 - v. Save the PDF.
 - vi. If it hasn't already detected and created fillable fields, click Add Text in the toolbar and add whatever information you want to your form. To add a logo or image to your form, choose the Add Image tool, select the image, click OK, and then place it in the desired location.
 - vii. To change the existing text boxes or images, click Edit in the toolbar. Add fillable form fields by selecting your preferred field type from the toolbar or by right-clicking anywhere in the form and choosing the Form Field tool.
 - viii. Click the desired location with your cursor to place the selected field, then set the field properties.
 - ix. When finished, save the form.
- c. Adobe Acrobat resources
 - i. *Adobe Acrobat for Legal Professionals*- <https://www.affinityconsulting.com/product/adobe-acrobat-for-legal-professionals/>
 - ii. *What's New in Adobe Acrobat DC?*- <https://www.attorneyatwork.com/features-adobe-acrobat-dc/>
 - iii. *Adobe Acrobat in One Hour for Lawyers*- <https://store.lexisnexis.com/products/adobe-acrobat-in-one-hour-for-lawyers-skuusSku-us-ebook-32595-epub>

2. Microsoft Word

- a. Creating and Using QuickParts- <https://support.microsoft.com/en-us/office/quick-parts-4ffef7c5-7596-4e95-9faf-41c771847a7b?ui=en-us&rs=en-us&ad=us>.
 - i. *Creating building blocks*: <https://support.microsoft.com/en-us/office/use-quick-parts-and-autotext-in-word-and-outlook-7a527697-058f-4967-b8f1-aae0774e4813>.
 1. Create and format your text.

2. Select the text, then select the Insert tab.
 3. Under the Text section, click Quick Parts, and choose 'Save select to Quick Part gallery' from the menu.
 4. A dialog box will appear asking you to confirm where you wish to save your new building block. Use this to name your building block and place it in a gallery for easy access later.
 5. To insert a building block, go to the Insert tab, select Quick Parts, then select Blocks Organizer.
 6. Locate the building block you want, highlight it, and place your cursor in the document at the place you would like to insert the content, and select Insert.
- ii. *Creating fields:* <https://support.microsoft.com/en-us/office/quick-parts-4ffef7c5-7596-4e95-9faf-41c771847a7b>.
1. To insert a Date field, go to the Insert tab.
 2. In the text group, click Quick Parts and select Field.
 3. Select Date from the list.
 4. Select the desired date format.
 5. Click OK.
- b. *Macros:* <https://support.microsoft.com/en-us/office/create-or-run-a-macro-c6b99036-905c-49a6-818a-dfb98b7c3c9c>.
- i. *How to create a macro:*
1. To create a macro, click View, Macros, Record Macro.
 2. Type a name for the macro.
 3. To use this macro in any documents, be sure the 'Store macro in box' says 'All documents (Normal.dotm)'.
 4. To run your macro when you click a button, click Button.
 5. Click the new macro and click Add.
 6. Click Modify.
 7. Choose a button image, type the name you want, and click OK twice.
 8. Now it's time to record the steps. Click the commands or press the keys for each step in the task. Word records your clicks and keystrokes. You have to use your keyboard only because Word doesn't record clicks of a mouse.
 9. To stop recording, click View, Macros, Stop Recording.
 10. The button for your macro appears on the Quick Access toolbar.
- ii. *How to run a macro using a button:*
1. To run the macro, just click the button. See the link above for how to create and run macros using keystrokes rather than a button.
- c. *Creating and Saving a Word document as a template:* <https://support.microsoft.com/en-us/office/create-a-template-86a1d089-5ae2-4d53-9042-1191bce57deb>.
- i. Open the Word document you want to save as a template.
 - ii. Click on File, Save As.

- iii. When you've chosen the location where you want to save the document and provided an appropriate name for the file, under 'Save as type,' choose Word Template.
 - iv. If your document contains macros, save it as a 'Word Macro-Enabled Template'.
 - v. Then click Save.
 - vi. To create a new document from a template, open a new Word document.
 - vii. Then click File, New, and Save As to a regular Word document. All of the saved features of the template should be in a new Word document ready for updating.
- d. Microsoft Word Resources
- i. *Microsoft Word for Legal Professionals*-
<https://www.affinityconsulting.com/product/microsoft-word-for-legal-professionals/>
 - ii. *The Lawyer's Guide to Microsoft Word Resources*-
<https://legal.intelligentediting.com/blog/how-to-translate-from-legal-language-to-microsoft-terminology/>

3. WordPerfect

- a. Creating and Saving a WordPerfect document as a template-
<https://www.lifewire.com/plan-and-create-wordperfect-templates-3540249>.
- b. Creating macros in WordPerfect- <https://wptoolbox.com/>.

4. General document automation resources

- a. LTC4 (Legal Technology Core Competencies Certification Coalition) (<https://ltc4.org/>)-
Training for law firms (attorneys and staff) to improve technology competency, including a plan that trains to increase efficiency when preparing, editing and comparing well-formatted documents (<https://ltc4.org/product/working-with-legal-documents/>)
 - i. The Effectiveness Project (<https://ltc4.org/effectiveness-project/>)- What every legal professional should know for effective and efficient drafting in Microsoft Word by laying out document creation stages
- b. The Essential Guide to Legal Document Automation-
<https://www.clio.com/blog/document-automation-for-lawyers/>
- c. These Document Assembly Tools Will Keep Your Law Firm on Track-
<https://www.abajournal.com/news/article/these-document-assembly-tools-will-keep-your-firm-on-track>
- d. Short Cut: Documate Offers an Easier and More Powerful Rendition of Document Automation Software- <https://www.attorneyatwork.com/short-cut-documate-offers-an-easier-and-more-powerful-rendition-of-document-automation-software/>