

# An Introduction To Automated Document Systems

Thanks very much for expressing interest in our services. We have prepared this document to help you understand what automated document systems are and how they can enhance your workplace. Particularly, we will answer four questions:

1. ***What is an automated document system and why is it valuable?***
2. ***How do I determine whether an automated system is right for me?***
3. ***How do I build a system?***
4. ***Where do I begin?***

We hope that you will find this introduction informative and helpful. If you have any questions, please contact us.

## What is an automated document system and why is it valuable?

An ***automated document system*** is an integrated collection of templates which a computer processes to produce fully customized documents from data provided by the user creating those documents. That is, an automated document system is...

- ***a collection of templates***--These templates contain two basic kinds of information. *Boilerplate* language remains unchanged no matter the circumstances. *Variable* information changes from one circumstance to the next. Examples of variable information include names, dates, addresses, and various parts of a document (e.g., clauses or paragraphs) that can be included or excluded in the finished product.
- ***integrated***--Uniform employment of variable information knits templates in a coherent system. For instance, names will go where they should *across the entire system*, dates will go where they should *across the entire system*, conditional logic controls optional clauses and paragraphs *across the entire system*, and so forth.
- ***to create documents***--The computer processes boilerplate language and variable information required to produce completed documents. Automated documents are as fully customized as any document produced in your word processor.

- **from data provided by the user**--The computer queries the user for variable information by presenting the relevant questions in an easily-understood format—one that you design so that you know it will be readily understood by all the users on your staff. As a result, document creation becomes a matter of data entry. And, because the system is integrated, any particular bit of data is keyed only once. *No more re-keying.*

*Automated document systems can incorporate both word processor documents and forms.* Prose documents and forms can be integrated in a single system. Indeed, systems can be built exclusively of form templates. This is especially important for those who currently complete forms using a typewriter or a word processor. The process, including creation of addenda, can be automated completely.

*Automated document systems can reside on intranets or the Web.* A single system can be employed wherever net access is available. More importantly, a company-wide system can be managed from wherever the expertise resides.

*Automated document systems integrate with data management systems.* Database information can be fed directly into templates, and information gathered during document assembly can be preserved for future use throughout your entire data management system.

The value of automated document systems is clear.

- **Computers perform mundane word processing functions.** Templates contain all the formatting and boilerplate language.
- **Systems capture and reuse expertise.** Automated systems can be created to produce very complex documents that are well beyond the expertise of the user assembling the documents. All the user needs to be able to understand are the questions asked by the computer.
- **System dramatically enhance efficiency.** Documents are produced more quickly, with greater consistency and accuracy.

### **Is an automated system right for me?**

Yes, if your situation matches one of the following:

- High-volume preparation of standard documents. Examples include commercial real estate leases, confidentially agreement, basic contracts, powers of attorney, letters, and so forth.
- Regular preparation of sets of complex, inter-related documents. Real estate leases are a wonderful example of this.
- Infrequent preparation of highly complex documents. Automation of such documents as major commercial property leases preserves the expertise from one document to the next.
- Preparation of standard documents in multiple locations. This is especially important for ensuring consistency, accuracy and quality of documents prepared by personnel in different offices.

## How do I build a system?

There are five steps in the system-building process:

### 1. **Plan, Plan, Plan (Measure twice and cut once!)**

Pick your target area and an initial set of documents to be automated. It is better to start modestly with a small set of documents in a clearly circumscribed practice area or task.

In addition to identifying the contents of the system, you must determine how the system will be made available to your users. Will it reside in each user's machine or somewhere on the server? Will it be available in only one office or across offices? Would you like to make the system available to your clients on the Internet?

Most importantly, you must decide who is the expert (or experts) behind the system. Who will guide construction of the system? Who will be given authority to make final decisions about the content of the boilerplate language as well as the variable information? This person (or persons) will be the primary contact with the construction team.

### 2. **Construct and Test**

Next, the documents must be automated. Who will be on the construction team? There are three basic options here. The first is to have the expert build the system. This option is attractive, but typically impractical. Your expert has better things to do than spending months learning the document automation tool and constructing the system. The second option is to have people in your organization build the system. This is the best option for organizations which anticipate the need for in-house document automation expertise and which have adequate staffing to support dedicated system constructors. The third option is for out-sourced construction by a company such as **Intelligent Words, Inc.** This is the best option for those organizations which do not need or want to invest in in-house document automation expertise and those who want an immediate head start.

How long will it take to build the system? Depending on the nature of the templates and the expertise of your construction team, the construction phase could take as little time as a week or as long as several months. A time-consuming but crucial component of the construction process is testing. It is best for you to establish a beta testing group within your organization to test the templates as they are automated. More testing during construction yields a higher quality system.

### 3. **Install and Validate**

After the system is constructed and tested, it must be installed according to the plans made in Stage 1 and validated by your users. User validation is essential to the viability of a document system. If your users don't have confidence in it, they won't use it. Users absolutely love a good system and become fiercely loyal to it. Hence, you must plan for ways to build user confidence in the system. These include preparing user documentation, conducting user training, getting user feedback, and maintaining and revising the system over time.

#### 4. **Maintain**

Ongoing maintenance is essential for recovering your investment. As users become comfortable with the system they will see ways in which it can be improved. Also your templates will need to be revised as your expertise increases and as the underlying knowledge changes. Simply put, systems must be kept up-to-date or their utility diminishes rapidly and your users lose confidence.

#### 5. **Enhance and Expand**

Down the road, you may wish to expand your system or construct an entirely new one. At this point it is well to take stock of the process so far. Make a list of the things which you did well, as well as the pitfalls to be avoided in the future. Then begin the process all over again. **Plan! Plan! Plan!**

### **Where do I begin?**

Start with step 1. Find a target area, and begin planning. **Get excellent consulting help.** The consultants at **Intelligent Words, Inc.** are ready to talk with you about what an automated document system can do for you.

