The Web and HotDocs
By Marc Lauritsen

Document assembly has been part of the legal technology landscape for over twenty years, and is slowly getting the attention it deserves. Use in law firms and legal departments is still mostly insular and episodic, but these applications are coming to be recognized as key components of contemporary law office knowledge management. In an age of increased competition from all quarters, and calls for process reengineering, technologies that offer realistic hope of delivering high-quality legal work in less time and with less stress, delighting clients and lawyers alike, have quite an appeal.

The basic document assembly features are available in a range of mature products from several longstanding vendors. HotDocs, from Capsoft Development (a division of Matthew Bender), is one of today's market leaders. Like some of its competitors, Capsoft has begun to offer some forms of integration with a slightly more famous technology—the World Wide Web.

This article will first discuss present options for serving templates from—and uploading answers to—web sites ("Weaving HotDocs into the Web"). Then we'll cover present ways to make content out on the web accessible in HotDocs libraries and help screens ("Weaving the Web into HotDocs"). Finally, after reviewing some advantages, applications, and issues, we'll look at browser-based assembly and other capacities we hope to see in later versions ("Future possibilities").

Weaving HotDocs into the Web

HotDocs's first suite of web-integration features started with last year's version 5.0. (The latest version, released this summer, is 5.1. It supports Microsoft Word 2000 and Corel WordPerfect 9, and offers a few other improvements, but does not add any web-related features.) The most basic and important feature is the ability to serve templates directly from a web site (on the Internet, an intranet, or an extranet). This means that users who have HotDocs on their computer can simply browse to a page, click on a link, and immediately start assembling a document or form. Alternatively, whole sets or "libraries" of forms can be installed to the user's computer in this manner.

Creating "auto-assemble" (.hda) and "auto-install" (.hdi) files requires HotDocs Pro (list price $499), but is a straightforward operation. Basically you select the template or templates you want, choose the "Publish" command, and respond to several dialogs about file names, locations, and other preferences. The resulting files can then be uploaded to a web site and used in connection with any recent version of "regular" HotDocs (list price $199).

Auto-assemble and auto-install files can also be referenced as URLs in a HotDocs library, set up as desktop shortcuts, or attached to an e-mail message. In each case, the user can just click-and-go, without needing to know or care where the underlying content may reside.

A second aspect of current web integration support is the ability to automatically upload *answers* from a document assembly session to a web site. In other words, the names, dates, numbers, drafting decisions, and other information supplied by a user in response to HotDocs's questions can be sent back to the web server for storage or further processing. (This is in addition to the standard, built-in option nearly all document assemblers have to save such answers in reusable answer files.) Uploading of answers is enabled on a template-by-template basis, and can be configured to ask the user or not. There is even support for caching answers entered when users are disconnected from the network, for later transmission.

Weaving the Web into HotDocs

In addition to pretty seamlessly injecting HotDocs content (templates and answers) into mainstream Web venues, the current integration features let you include web content in the HotDocs experience. There are at least three ways to do this:

♦ You can directly reference a web page in a HotDocs library, allowing users to browse to specified content in the same way they choose templates to assemble.
♦ You can reference a web page in customized help for a question or dialog inside an assembly session, so that when a user presses the Help button, the specified page is displayed.
♦ You can build customized buttons, with appropriate names, and place them on dialogs to do the same thing. The destination page can even vary based on information previously entered.

Some Advantages

Why should you care about these new features?

First, they facilitate *centralized content management.* Intelligent templates delivered via web sites are easy to update, ensuring instant availability to all users and automatic consistency. Offices with local (or wide) area networks can already achieve this by storing templates in networked directories, but the web is more straightforward, and better suited for applications that need to be distributed to widely dispersed users or across organizational boundaries. Organizations will find web delivery particularly useful for remote and mobile access.

Second, auto-assemble and auto-install files provide built-in *compression* and optional *encryption.* Even in these days of increasing bandwidth, it's nice to move files quickly and securely

Third, accessing template links on web pages through a browser piggybacks on *user familiarity*. No new interface need be learned for finding and launching templates.

Fourth, delivery of HotDocs templates through a web page rather than the conventional "library" screen permits *flexible contextualization.* You can surround links to templates with explanatory and reference material, for instance, which the standard library interface does not allow.

Fifth, web delivery eases *integration with other knowledge systems.* Offices that have intranets, for instance, can now serve interactive document generators along with their brief banks, clause libraries, and threaded discussion forums. The document templates in turn can take advantage of the wealth of materials on the intranet (and Internet) to inform and guide their users.

Some Applications

Where will these features be put to use?

The primary arena will likely be *within law offices*, as an alternative distribution method to local area networks, for the reasons discussed above. But web-delivered HotDocs content also opens the door to easier *client use.* Several firms I know of are already experimenting with having clients access HotDocs questionnaires over the web for *entry of basic case information.* Documents are later assembled at the firm after the client information is reviewed and further decisions are keyed in. Firms are also building templates *as services to clients.* Templates for routine contracts or other documents are deployed at the client site. If answer uploading is enabled, the firms can track client transactions and offer assistance where appropriate. Publishers and other players can use these tools to deliver interactive document products to a broad base of *customers outside the lawyer-client context.*

Some Issues

These exciting advantages and opportunities don't come without some downsides.

Most notable is the ongoing need for users to have a copy of HotDocs installed on their PCs (together, usually, with a Windows word processor) in order to use online templates (the so-called "fat client" approach). This is no problem for regular users within an organization, but clients or customers outside with only occasional need for templates will find it awkward to have to install HotDocs first.

And however simple the "publishing" process is, it still represents an extra step developers have to take in order to distribute—and update—their templates.

Web pages have some disadvantages as well as advantages when compared to the native HotDocs library interface. For instance, you can't control- or shift-click to select multiple items for assembly in one session. And users can't quickly reorder templates or organize them into folders, as is possible in the native interface.

Finally, full use of HotDocs's web features involves quite a bit of technicalia. You will need to have (or be) someone who is comfortable with MIME types, HTML posts, CGI scripts, and the like.

Future Possibilities

Capsoft has delivered a great deal of value in its web integration tools, which could keep law offices busy happily exploiting for several years. But there are several obvious areas of further evolution.

The Holy Grail of online document assembly is the ability to run templates directly through a browser interface, from a "thin client" that requires no prior acquaintance with a document assembly program. There are lots of technical challenges involved, and questions such as where the processing occurs (client, server, both) and what the user should be able to do with the assembled results. But several of the vendors are close to pulling this off, and Capsoft should make progress in this direction as part of HotDocs 6, reportedly forthcoming by early 2001.

Another refinement I'd like to see is an ability for template authors to weave together modules of logic and scripted text from across the Internet. Firms, publishers, or industry consortia could publish libraries of components covering typical facts, issues, and clauses, which could be used as building blocks for customized templates. Law office technologists could spend less time reinventing, and more time adding value. Working smart, after all, is the basic motivation for using document automation in the first place.

Further Reading

♦ Capsoft Development, "Publishing Templates and Web Integration" (Excellent technical summary; in materials distributed at the February 1999 national training conference; probably still available from Capsoft)
♦ Lauritsen, "Assembling Documents on the Infobahn" (*WORD Progress*, Summer 1997, p. 14 - available at http://www.abanet.org/lpm/newsletters/wp/Su97Laur.html)
♦ Lauritsen, "Legal Practice Systems in Cyberspace" (First Australasian Legal Information Institute Conference on Computerization of Law via the Internet, Sydney, June 1997; available from author)

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