Word Processing, Hypertext Briefs, Legal Forms, and Document Assembly

The processing of words will continue to provide the most significant amount of computer use in the legal profession. Our profession is built on the preparation of pleadings, letters, corporate papers, and so on. We write, argue, and settle cases using verbal and written words. It is indeed unusual to find a law office that has not incorporated the use of word processing into a large part of their everyday use. The volumes of materials discussing how to use a word processing program in the legal profession will not be duplicated here. The focus will be upon the advanced features of word processors, as well as the integration capabilities with other software programs.

It is important to realize that the word processor is just that - a word processor. It is extremely time consuming to enter data and generally does not save a significant amount of time in preparing repetitive clauses or documents. Time can be saved, however, if you use its advanced features or link to other computer application programs, most notably, a document assembly program. In this section, we will examine advanced time saving features of word processors, such as AutoText, and focus closely upon the critical and important interface of word processors with a full-featured document assembly program.

Advanced Features - Word Processors

The two most popular word processors are Microsoft Word™ (www.microsoft.com) and WordPerfect ™ (
 www.corel.com
). The following features are generally available in these two packages, but may be identified by different names.

Macro. A macro is a recorded series of commands, mouse clicks, or keystrokes that "playback" within a word processor, spreadsheet or other application automating repetitive tasks. They can add standard blocks of text and format documents to standard law firm formats. They can connect the word processor to other applications, such as a case or document management system and database program. Creating macros is relatively easy in most applications, and usually just requires one to turn on a recorder, go through the keystrokes, save, and name the macro. It can be played again and again by clicking on an icon to which it has been assigned, or by pressing a preassigned keyboard command. Macros are generally written for tasks that are repetitive or tedious. There are many legal user macro groups that oftentimes share macros that

they have created.

Revisions. The revision feature will show where text or graphics have been added, deleted or moved. The recipients of your legal documents can comment on, change, or add to the document and you can view those alterations. Changes by various authors can be tracked to show who made the requested changes. Also, documents routed to other parties can be protected from permanent change until final decisions are made. Reviewers can add annotations without changing the content of the documents. This feature is very important when a document needs to be revised by a number of people. It saves significant time in eliminating the need to redraft copies and recheck the entire document each time a new draft is prepared and routed to the various parties.

AutoText. AutoText enables you to reuse text and graphics by clicking a button or typing a few keystrokes. For example, if you type in the name of an AutoText entry, such as the word Michael, and press the AutoText button, the AutoText stored for the word will appear. In this instance, the AutoText stored could be the name and address for the person.

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This feature has many uses in the practice of law. It would be easy to set up form interrogatories using this feature by identifying key interrogatory questions by subject or event categories. For example, one could type in "Name" and click on the AutoText button and the interrogatory question "State your name and any other names, including nicknames, that you have been known by over the past 10 years." would automatically appear.

Another popular use is to set up boilerplate contractual clauses that would automatically produce a clause that has been previously typed in. It automates previous work by typing in a few keystrokes.

Formatting. Within word processors, formatting text means changing the font, size, spacing, and other character features. This is usually done on a per word basis. Advances in word processing permit you to now format paragraphs and entire documents to a predefined standard. After completing the document, you then apply an auto-formatting tool to apply the desired pleading, memo, appellate brief format, or other format of your choice.

Templates. A template is a blueprint for your routine documents. It can contain the fonts, formatting, AutoText entries, AutoCorrect entries, styles, and macros for the specific document of your choice. It can also be linked directly to a database to retrieve data important to the document. For example, you could have a client template document that would automatically fill out the client information, terms, etc. and format it onto your letterhead stationary. You also could fill out certain database records and have the database automatically execute a routine in the word processor to prepare a complaint. Templates, combined with a powerful database, can systematize most of your routine legal document work.

Mail Merge. The mail merge feature is misnamed and should be named Data Merge. This is because the "mail merge" feature enables you not only to merge names and addresses, but any other data into any document of your choice. For example, if you set up a database to control deposition notice time, dates, locations and so forth, that "data" can be "merged" with a Notice of Deposition document automatically to produce notices to the parties involved.

The mail merge function is an extremely valuable tool for the law firm. A partial list of documents created with the merge function could include: initial client letter, complaint, answer, interrogatories, request for production, reports to clients, enlargement of time notices to the court, firm revenue reports, and so on.

Wizards. Wizards, experts, and coaches are features in programs that fulfill a request to make software programs user friendly. Wizards take you step by step through the process of creating many types of documents. For example, one wizard, aptly termed the PLEADING WIZARD in Microsoft Word, takes you through the process of creating a pleading, including numbered lines, correct caption, and so on. It reduces to a few minutes the steps necessary to create a pleading in a case. Once you save the results of your wizard as a template and set up a mail merge from a database, you immediately have the beginning of a powerful document assembly system. Other document types that can be created with wizards include tables, calendars, faxes, resumes, newsletters, and memos.

Other powerful features of your more powerful word processors include:

-     Outlining;
-     Envelope addressing;
-     Grammar correction;
-     Master document organizer for briefs and other long documents;
-     Automate Table of Contents & Authorities creator;
-     Undo/redo commands;
-     Bullets and numbering;
-     Extensive label and envelope print options;
-     Customized toolbars;
-     Drag and drop text;
-     Spell Checker;
-     Bookmarks for documents;
-     Annotating, revising and routing documents by e-mail;
-     Sound Embedding;
-     AutoCorrect - automatically corrects commonly spelled words in your documents;

-     Embedding OLE objects such as graphs, clipart, etc.;
-     Field insertions for automatically inserting dates, time, etc.

The word processor is obviously an important tool in our profession. When it is combined with other applications and advanced word-processing tools, it becomes increasingly valuable.

Contrast word processors with database programs

Word processors are not database programs. They are unable to structure a set of data, sort it, export it and create relational tables. Many firms try to control their document data information using word processors. The use of document information, once entered in a word processing document, is very limited. Use a database if you are attempting to control structured information from your litigation documents, assemble legal materials, or generate database reports.