

OneLaw Document Assembly – Modern Document Automation

We are pleased to introduce one of our most recent OneLaw developments, a modern document automation solution that is code/macro-free.

Summary

Key highlights of the new system:

- + Document automation is no longer reliant on MS Word VBA macros, making the solution easy to maintain, more reliable and much more secure
- + Create custom document and email precedents that can incorporate client, matter and InfoSheet data as variable content
- + Create custom forms to gather variable data for inclusion in documents
- + Centralised signature management including delegated signing authorities
- + Clause libraries enable variable document content in templates and precedents, and common clauses such as attestations can easily be inserted into any document. Clauses can be varied based on data values stored on the matter, or selected by authors as they edit the document
- + New stationery feature automates the application of the firm's style guide (font, spacing, margins, branding, etc.) to any Word document. This also centrally manages defaults for different document types, e.g. switch to Christmas letterhead in December
- + Settlement and reporting statements have moved from MS Word back into the OneLaw application. This offers a lot more flexibility, functionality and reliability

Details

No Macros

Our new solution is no longer reliant on MS Word VBA Macros. This has the following advantages:

- + Document template and precedent development is now code-free, so no specialist skills are required to deliver and support document automation using our new solution. This means that:
 - + There are more people available to deliver and support solutions for our customers
 - + Our clients can choose to become self-sufficient by taking document automation work in-house
- + Templates and precedents can be developed more quickly – saving time and money
- + Removing VBA Macros leads to a much more reliable solution. Recent updates to MS Office, particularly 365, have caused reliability problems with VBA macros. We expect this issue to exacerbate over time as this old technology gets left behind. New online versions of Office 365 offer no support for VBA macros
- + Cybersecurity consultants use a guideline for improving an organisation's cybersecurity profile, called the 'Essential Eight'. These are the eight things that should be done first to make your computer system more secure. One of the essential eight is to disable MS Office Macros, which can and have been used to deliver malware to computer systems

InfoSheets

Our new document assembly technology utilises custom data captured in InfoSheets. InfoSheets were released in a prior OneLaw version and are created to capture custom matter data (e.g. a conveyancing InfoSheet might include settlement date and purchase price). This data can then be used to populate document and email precedents.

Signatures

Scanned signatures are now stored against each user's profile in OneLaw. This means that they can easily be maintained in-house. When maintaining a user's signature, you can also give delegated signing authority.

Email Precedents

The new solution enables email precedents with variable content completed from client, matter and InfoSheet data. This saves a lot of time creating common emails e.g. congratulating a client on their property transaction going unconditional.

Statement Builder

Our new Statement Builder allows users to generate settlement, reporting and general statements in OneLaw. Statements can be initiated and edited in an on-screen grid, allowing additional/future transactions, sub-totalling and apportionments to be added. A smart built-in apportionment calculator allows users to easily calculate rates, body corporate fees, rent and subdivision apportionments.

Statements can be saved and amended multiple times prior to final production. A dashboard shows filtered lists of statements produced within any timeframe, by any user or for any author. Settlement statements now automatically draw information such as sale price, settlement date, deposit paid, etc. from InfoSheets stored on the matter.

Stationery

OneLaw's new Stationery functionality allows users to apply consistent firm branding and styles to any document. This is valuable functionality for firms that use third-party precedent libraries which are not formatted with the firm's own branding. It allows date-sensitive content to be incorporated in documents, e.g. Christmas messages during December.

Clause Libraries

New Clause Library functionality allows firms to maintain their own centralised libraries. Clauses can be accessed manually when editing a document or inserted automatically based on values stored in InfoSheets.

Benefits

The benefits of using this new technology are many:

- + Speed up the production of complex documents
- + Improved consistency of branding on documents produced across your firm
- + Easily apply your firm's branding and styles to any document
- + A centralised precedent library with good controls on the content will eliminate risks associated with each user having personal favourite precedents with potentially dated content
- + Improve client communications with a library of regularly used email precedents
- + Templates and precedents are stored by work type (e.g. conveyancing), so OneLaw can present a list of relevant precedents for the matter
- + The new Statement Builder makes statements very easy and quick to produce
- + Simplify the process of signing documents
- + Disabling VBA macros will make your system safer from cybercrime