

# Drafting and Document Automation Solutions

## **2016 Enhancements**

In 2016, we invested heavily in developing Thomson Reuters legal solutions to meet the evolving needs of our customers.

## The Highlights

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We would like to provide an exclusive insight into the work that we, at Thomson Reuters, have been doing to ensure that our legal solutions remain invaluable to the work that you do.

In consultation with customers, we have introduced new functionality, developed existing features and improved usability.

## Behind The Scenes

### ✔ Customised training

To help users make the most of our solutions, we delivered tailored training sessions to suit each organisation's needs. We also provided first class support to customers via phone, email and face-to-face throughout the year.

### ✔ Improved integration

We continued to integrate Contract Express and Drafting Assistant with reputable third party applications.

### ✔ Streamlined operations

We streamlined our internal operations this year to improve efficiency and help us stay focused on delivering easy-to-use and clever.

### ✔ Acted on feedback

In 2016, we continued to work closely with customers to understand their evolving needs. Through focus groups, customer events and surveys, we gained invaluable feedback from users which helped to shape our solutions and supporting resources.

## How our drafting solutions can help with efficiency

With Thomson Reuters Contract Express, users have access to a well-maintained precedent bank which includes all the necessary automated documents for day-to-day working. Rather than starting from scratch or from an old template, you can use Contract Express to fill out an easy-to-use template questionnaire to create the first draft of a document. This results in a time saving of typically more than 80% when creating a document, compared to the time taken with traditional methods.

To save even more drafting time, Thomson Reuters Drafting Assistant can be used to check for any citation or proofing errors, with the help of Practical Law and Westlaw UK integrations, right within Microsoft Word.

By using our drafting and document automation solutions, you can focus on providing a value adding service for your clients and use your knowledge and expertise in the form of legal advice, rather than spending time drafting.

### KEEP UP TO DATE

Read our **Broadcast newsletter** sent bi-monthly to users, which highlights upcoming enhancements to our products, new products due to launch, key content additions and content that we've produced related to current hot topics.

To receive the next Broadcast newsletter, please sign up at [legal-solutions.co.uk/newsletter](https://legal-solutions.co.uk/newsletter).



# CONTRACT EXPRESS

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Thomson Reuters Contract Express is trusted by the world's leading law firms and corporations to generate standard legal documents from automated templates – reducing or eliminating the delays, costs, bottlenecks, and risks that are inherent with manual drafting.

In 2016, we incorporated customer feedback into the development cycle and delivered two major releases; version 6 in May and version 7 in November; making document drafting and delivery, quicker and easier than ever before.



# Overview

## WHY FIRMS CHOOSE CONTRACT EXPRESS



It has helped us to retain key clients



It has freed up partner/associate time for more "value add" work



It has enhanced our client facing services

## WHAT DOCUMENTS ARE BEING AUTOMATED?



## IN WHICH PRACTICE AREAS?



\*Source: Thomson Reuters 2015 User Group Survey



## What's New?

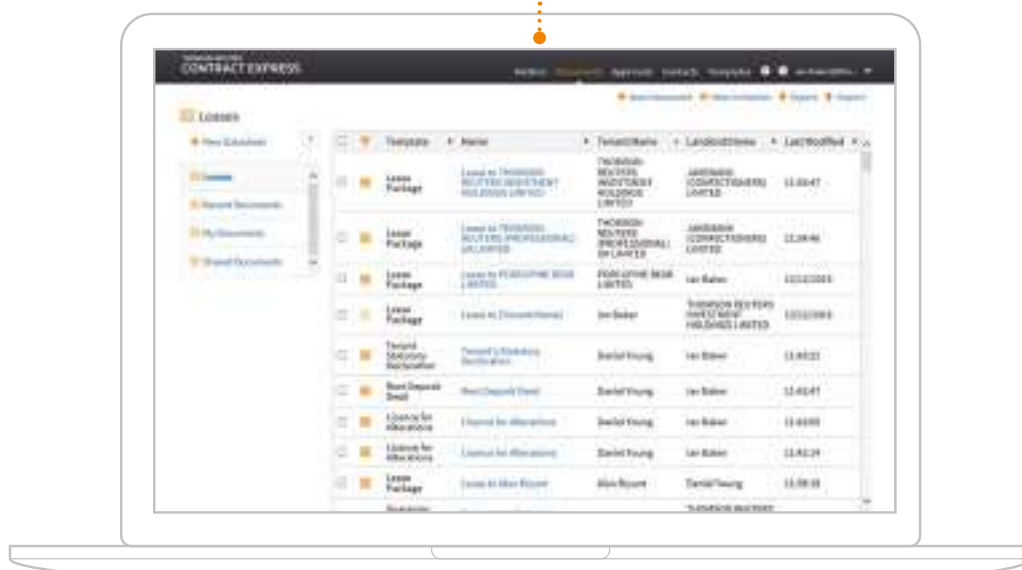
### CONTRACT EXPRESS VERSION 6

The new range of features in version 6 was designed to increase visibility and reusability of document data. Our developers focused on enhancing document assembly capabilities to help law firms provide innovative services to their clients through Contract Express.

Name	Tenant
Letter to THOMSON REUTERS INVESTMENT HOLDINGS LIMITED	THOMSON REUTERS INVESTMENT HOLDINGS LIMITED
Letter to THOMSON REUTERS PROFESSIONAL LIMITED	THOMSON REUTERS PROFESSIONAL LIMITED
Letter to PORCUPINE BEAR LIMITED	PORCUPINE BEAR LIMITED
Letter to [Tenant Name]	[Tenant Name]

#### Datasheets

Datasheets allow users to access data across all documentation and have better sight of transactional information such as parties, key dates and clauses. Datasheets can be created by administrators for all users or users can create their own personal datasheets to suit their needs.



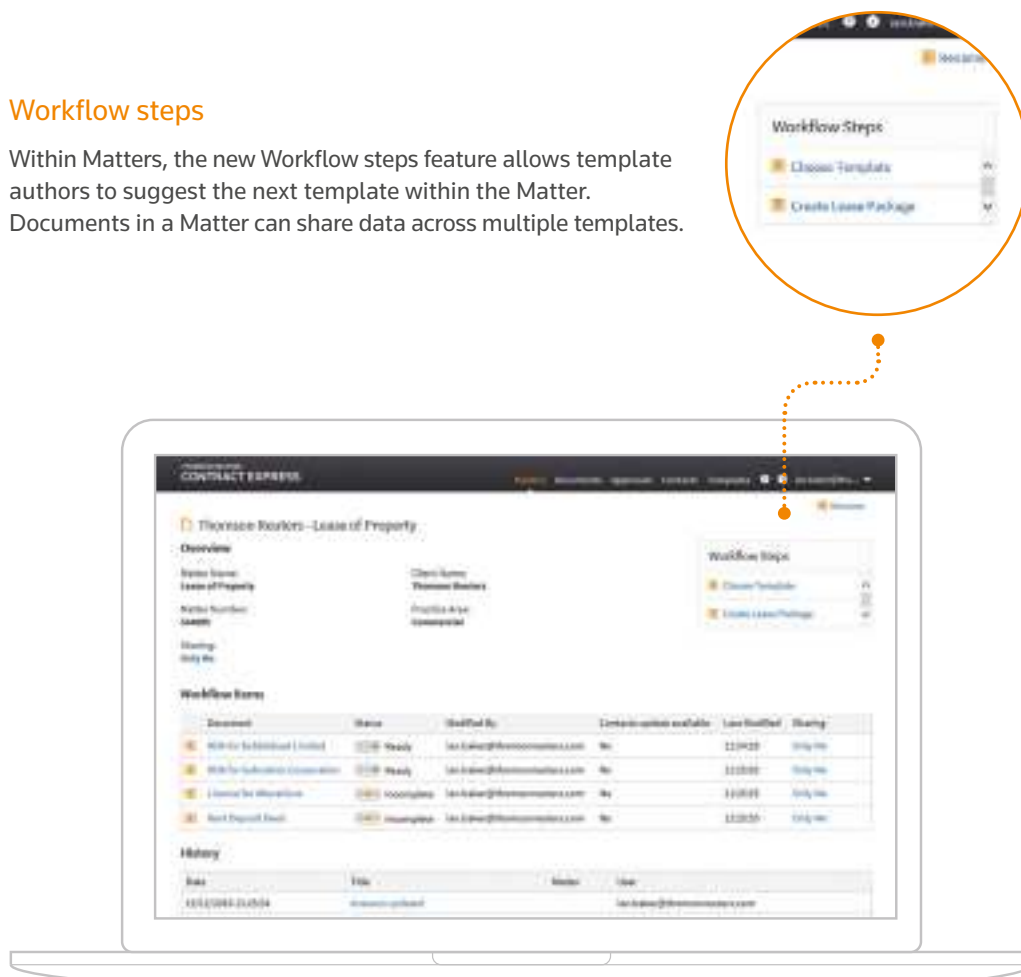
#### Version control of documents

Users are able to download prior versions of assembled documents and upload manually edited documents into Contract Express and share with clients via the Client Site.



## Workflow steps

Within Matters, the new Workflow steps feature allows template authors to suggest the next template within the Matter. Documents in a Matter can share data across multiple templates.



## Matter centric collections and suggested templates

Contracts addressing a specific Matter can be grouped together in a collection, making it quick and easy for users to find what they need.

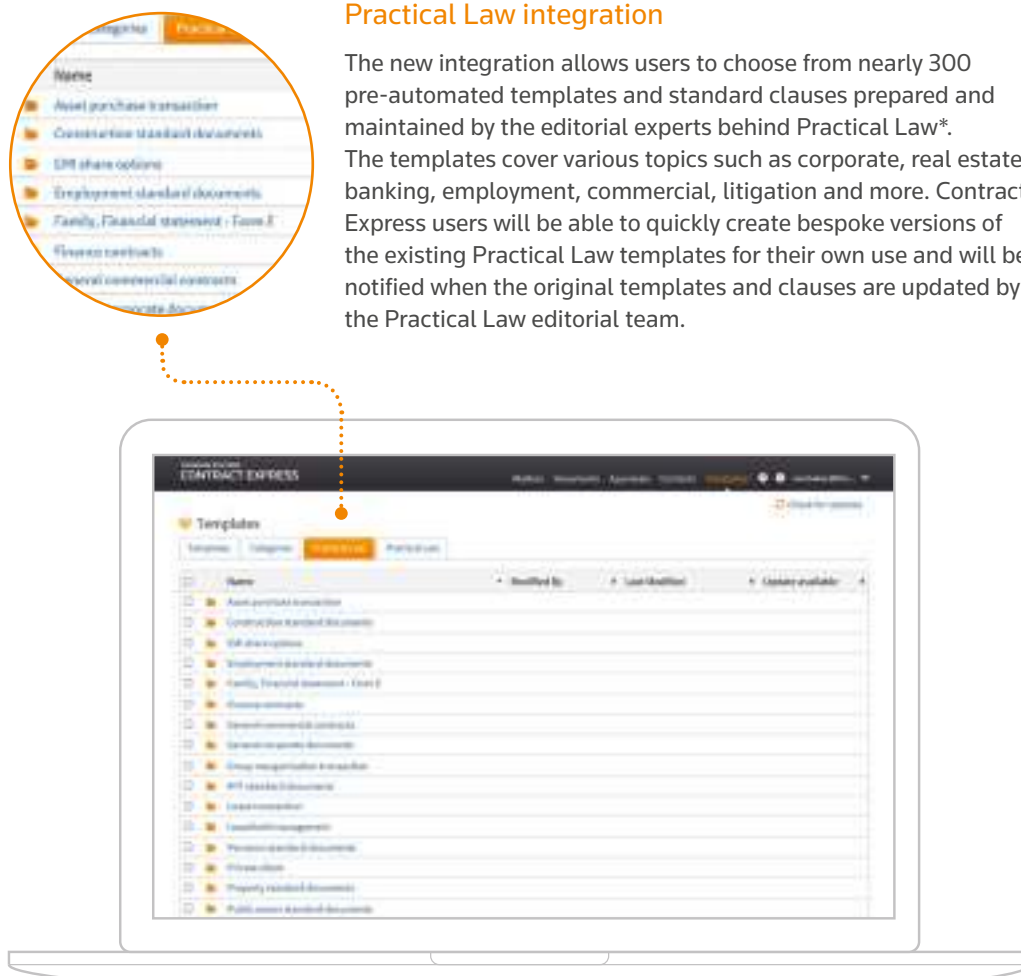
## CONTRACT EXPRESS VERSION 7

As part of the latest major release, we introduced new features to further speed up the document creation process with increased precision and allow users to use Contract Express on their own precedents.

### Practical Law integration

The new integration allows users to choose from nearly 300 pre-automated templates and standard clauses prepared and maintained by the editorial experts behind Practical Law\*.

The templates cover various topics such as corporate, real estate, banking, employment, commercial, litigation and more. Contract Express users will be able to quickly create bespoke versions of the existing Practical Law templates for their own use and will be notified when the original templates and clauses are updated by the Practical Law editorial team.



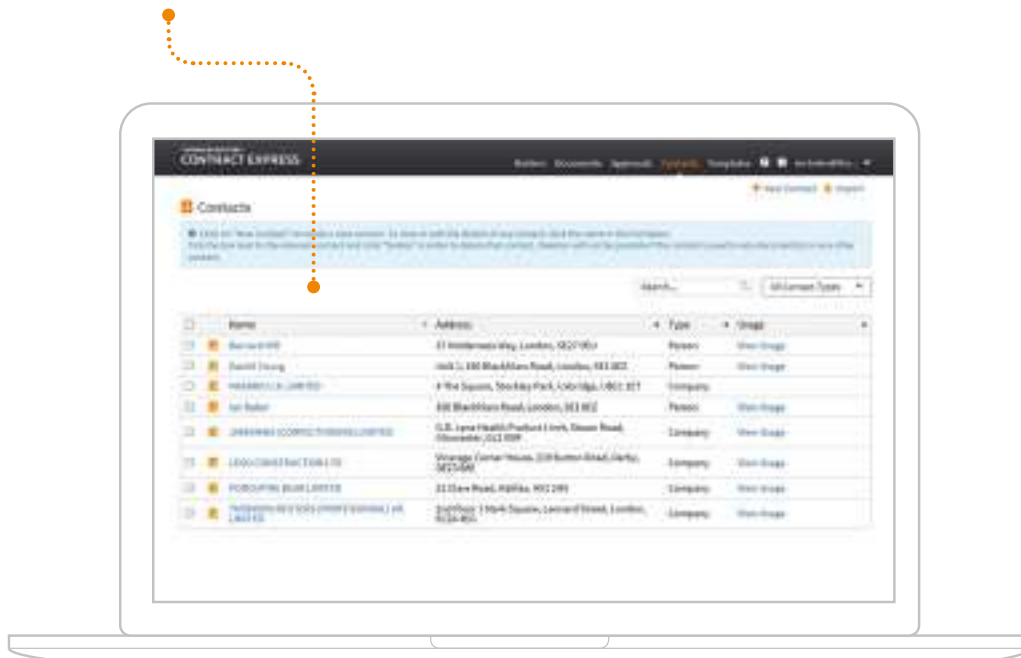
\*Practical Law subscription required.





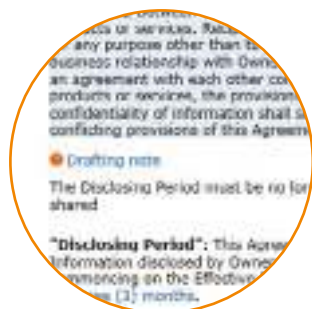
## Contacts

With the new contacts feature, users can share contact information between templates from a centralised data store of contacts and entities. Users can easily discover which documents feature a given contact or entity and receive notification when the data is updated.



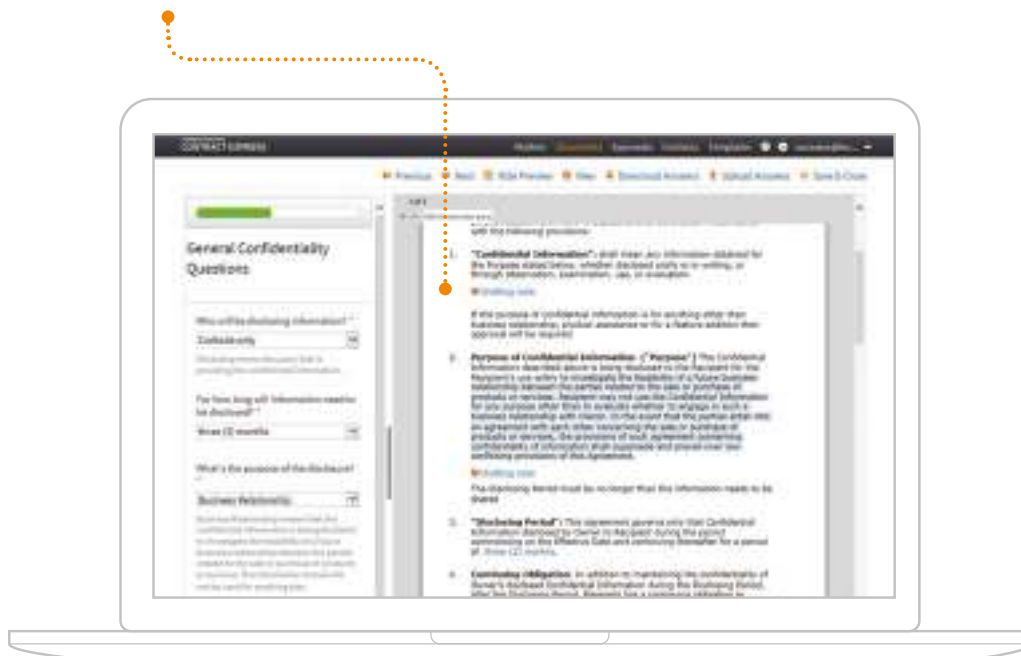
## Contract Express Negotiator

Version control and document merging are made easy with the new Microsoft Word plugin. Within Word, users can view version history, compare versions merge any changes into a single version; enabling users to work for predominantly in Microsoft Word.



## Drafting notes for Preview

Template authors can use drafting notes to create inline guidance within Preview and understand the importance of specific clauses.



## UK Companies House and postcode integration

The new look-up feature for Companies House enables users to quickly find company details and contacts to use in their templates and keep those up to date. What's more, users can search for UK postcodes within the Contract Express questionnaire.



## Coming soon...

In 2017\*, we will deliver new features to streamline working processes, further automate document generation and help users to draw more value from their data. These enhancements will be delivered in three versions throughout the year; versions 7.1, 7.2 and 7.3.

### 2017

#### • Process reporting

View various reports for different processes, a KPI dashboard based on default metrics as well as scheduling, exporting and sending reports.

#### • Data sync in Contract Express Negotiator

Users will have the ability to change data using the Negotiator add-in and then sync the data with Contract Express.

#### • Licence management for law firm clients

We are giving administrators more control and introducing a more efficient method to manage user licences.

#### • Docusign Anchor Tags

Users will soon have the ability to anchor a tag to a word or series of words in a document, so users can easily populate a document.

#### • Contract Express for SharePoint Enhancements

Experience a more intuitive user interface, with the ability to report on various processes such as the approval process.

#### • Negotiation process

The negotiation process involves initiating a negotiation, viewing negotiations, changing negotiation status and completing a negotiation, all within Contract Express.

#### • Contract Express Author enhancements

Enhancements include:

- the ability to convert variables to plural using a function
- a wizard to easily add business rules and fields to a document
- an easy and intuitive Mark-up Editor

#### • Further integration

We will be facilitating integration with the Dutch Chamber of Commerce, Worksite and SDLT.

- **Dutch Chamber of commerce** – extract company data to use in contracts.
- **Worksite** – send documents to Worksite from Contract Express and control versions with an advantage to search and compare documents.
- **SDLT** – complete and handle Stamp Duty Land Tax forms in Contract Express.

### 2018

\* Please note, the enhancements planned for 2017 are subject to change.

# DRAFTING ASSISTANT

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Drafting Assistant works within Microsoft® Word to scan your documents intelligently in seconds, alerting you to errors, inconsistencies, missing information and more. Drafting, research and analysis is provided seamlessly within Drafting Assistant so you won't lose your drafting rhythm.



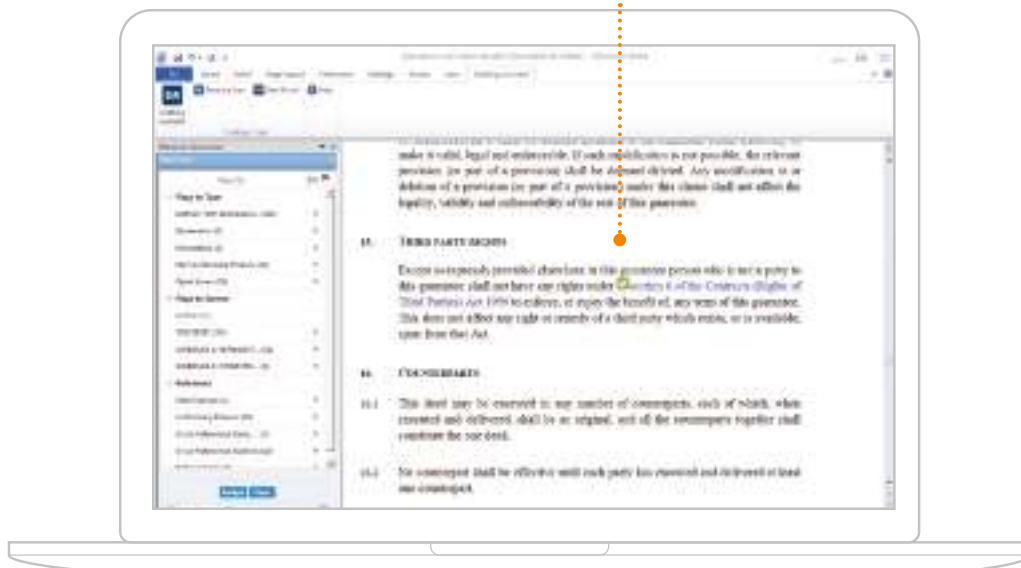
# Overview

## KEY FEATURES OF DRAFTING ASSISTANT

### Proofreading

Run the Drafting Assistant core analyser tool, Deal Proof, to instantly identify open issues, defined term errors, inconsistencies and more. Then use Flags to jump right to potential drafting mistakes to review and correct, if needed.

...in this guarantee person who is  
...under section 6 of the Contract  
...enjoy the benefit of, any term of  
...of a third party which exists.



### Practical Law integration

Search and access Practical Law Standard Documents and Clauses right within Word, so you can quickly benchmark your document, get drafting guidance or cut and paste precedent language from the world's leading legal know-how service\*.

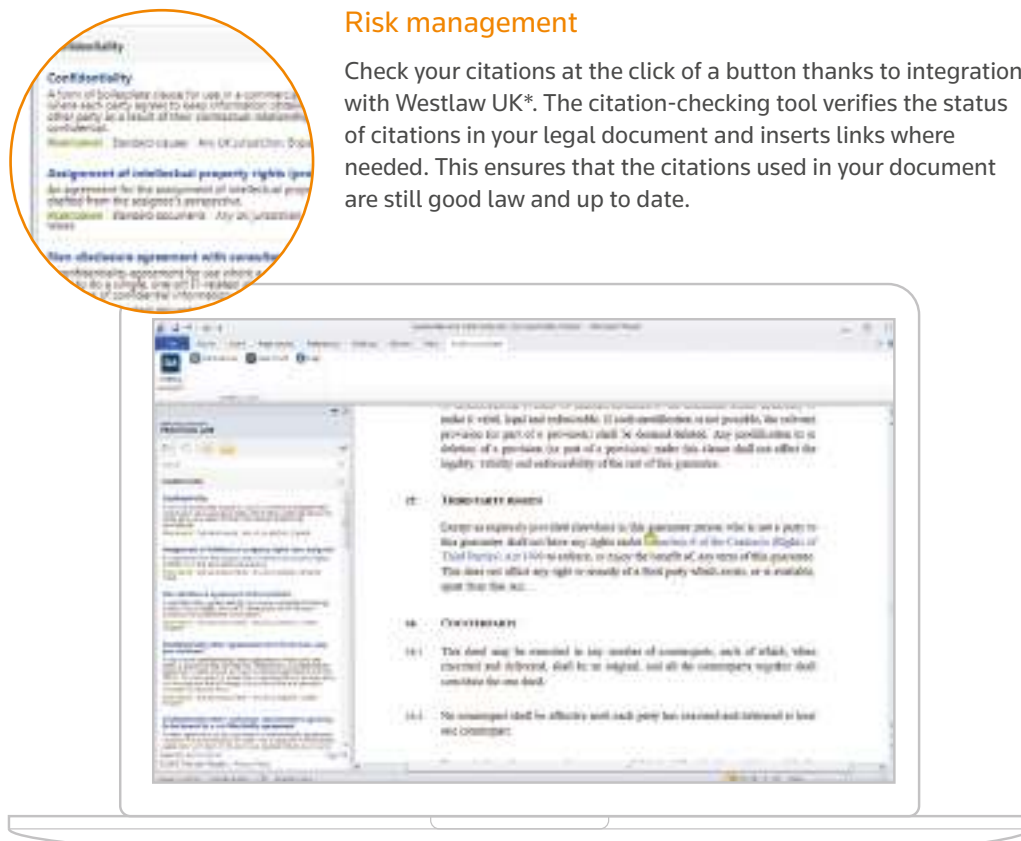
### Reporting

Get detailed reports of flagged items to correct for yourself or to share with colleagues via email.

\*Practical Law subscription required.

## Risk management

Check your citations at the click of a button thanks to integration with Westlaw UK\*. The citation-checking tool verifies the status of citations in your legal document and inserts links where needed. This ensures that the citations used in your document are still good law and up to date.



## How much time can be saved when proofreading a legal document?

The time-saving benefits of using Drafting Assistant, compared to manual proofreading.

**77%**

time saved by running a summary report on errors in Drafting Assistant\*\*

**65%**

time saved by proofreading your own documents in Drafting Assistant

**61%**

time saved by proofreading the other side's documents in Drafting Assistant

**50%**

Time saved by proofreading documents from a colleague in Drafting Assistant

**72%**

Time saved by using Drafting Assistant to identify numeration errors

**64%**

Time saved by cross-checking defined terms in Drafting Assistant

\* Westlaw UK subscription required.

\*\* Source: Thomson Reuters 2016 customer survey.



## Coming soon...

### 2017

#### PDF processing

In early 2017, we will launch PDF processing to allow users to scan image and text based PDFs in Drafting Assistant.

#### Deal Proof dynamic updating

When users resolve flagged issues in Deal Proof, the items will be removed from the flagged list so that users only have sight of unresolved issues and can work through these with ease.

#### Word for Mac compatibility

Users will soon be able to use Drafting Assistant on Mac devices and move seamlessly between Windows and Mac operating systems.

#### Contract Express integration

The new integration will allow users to launch Contract Express\*\* questionnaires within Microsoft Word and use Drafting Assistant in conjunction with Contract Express to enhance template quality.

#### User experience enhancements

We are continuing to improve the look and feel of Drafting Assistant, providing a cleaner and more fluid user experience.

#### Practical Law folder integration

We are bridging the gap between Practical Law and Drafting Assistant by seamlessly synchronising folders and annotations created in Drafting Assistant with those created in Practical Law\*\*.

#### Deal Proof date flag

The new date flag will highlight all of the dates included in a document for easy review.

### 2018

\* Please note, the enhancements planned for 2017 are subject to change.

\*\* Practical Law and Contract Express subscriptions required.

To learn more about legal solutions from Thomson Reuters, please contact your dedicated account manager and visit [legal-solutions.co.uk](http://legal-solutions.co.uk)

#### WHY THOMSON REUTERS?

Thomson Reuters delivers intelligence, technology and human expertise you need to find trusted answers. We provide best-in-class legal solutions to help you work faster and smarter: Practical Law™ for expert know-how; Westlaw® UK for the most powerful, accurate legal search; and more.





REUTERS/ Arnd Weigmann

The intelligence, technology and human expertise  
you need to find trusted answers.



the answer company™

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