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Review of XpressDox 4.4

By Matthew Berg

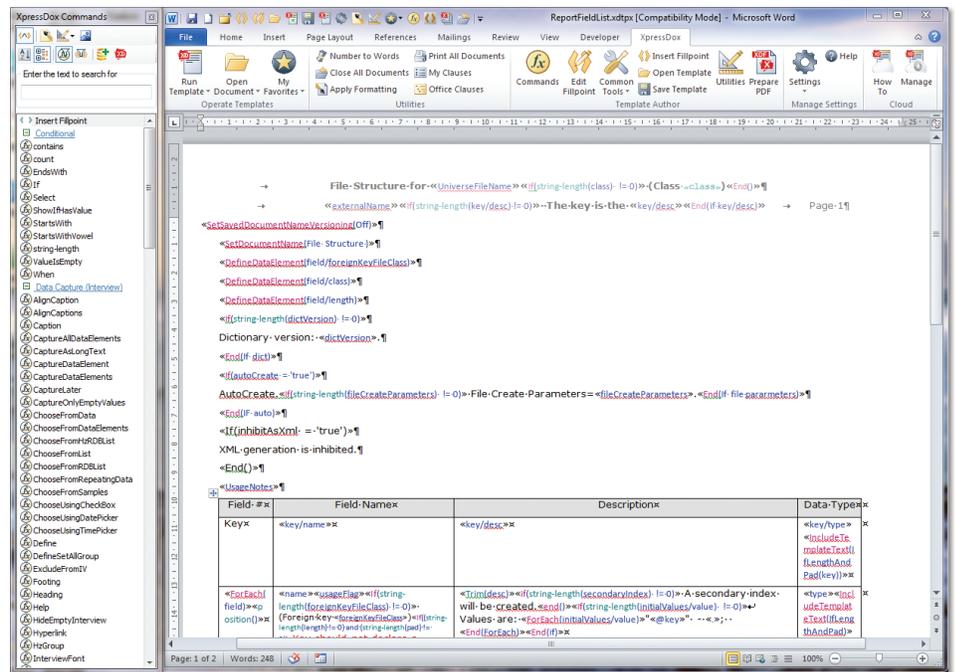
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Productivity gains have resulted in record profits in recent years. Much of this productivity results from automation. In large law firms, automation of document creation can have an especially profound impact given the scale at which they operate. In this issue of BigLaw, law firm CIO Matt Berg reviews XpressDox 4.4, the new version of one of the leading document assembly products. Matt covers its pricing, setup, basic and advanced tools, and support. This comprehensive look at XpressDox will enable you to make an informed purchasing decision if you're in the market for document assembly software (and perhaps set the wheels in motion if you're not).

OSmart's **XpressDox** is a document assembly program for Windows PCs with which you can create templates that work within Microsoft Word. Version 4.4 shipped in September 2012.

The company sells an Author License for \$200, but those in large law firms may want the Supervisor License at \$1,000 as it provides for centralized administrative control across your network. A Template Runner License for those who will just use the templates you create costs \$150. These licenses entitle you to two years of updates after which you receive discounts on future updates. If you prefer, you can "rent" XpressDox on subscription basis at half of the above prices per year. If needed,



technical support costs \$100 per hour. I received a complimentary Supervisor License for purposes of this review in *BigLaw*.

BASIC USE AND FUNCTIONALITY

Installation is straightforward. You double click on a 27 MB EXE file, and dutifully click on the old faithful Next button a few times. Once installed, additional configuration of the product is almost equally straightforward.

Indeed, XpressDox is usable without any further configuration at all — though it would have been a much less valuable a product (especially for a large law firm) if it didn't have options to configure it for a multi-user environment by establishing standard folders, "helper" folders, standard data elements (variables and their values), and — my favorite and the most important of all — data sources.

XpressDox is very easy to use. Before I found the configuration settings I took a tour of the XpressDox ribbon and was creating fill points for a template and playing around with "Commands." I managed to put together a basic template in only a few minutes. All of that without having read a single document on how to use the product!

After a quick foray to the XpressDox web site to browse through some tutorials, my next task involved establishing two different data sources connected to two different SQL databases, one with addressee tables in our document assembly database and one with client information from our time and billing database. Anyone familiar with setting up data sources and basic data mapping (or I suppose even someone familiar with mail merges

using spreadsheet-based data sources) would have no problem using the XpressDox configuration interface to work with data sources from Excel, Access, Outlook, and ODBC databases like SQL.

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During my exploration, I also discovered under the Utilities function that you could convert field delimiters in existing templates. XpressDox ships with an understanding of HotDocs and GhostFill delimiters, but also enables you to flexibly apply rules to convert other field delimiters as well. This utility should prove helpful in an implementation involving the replacement of another document assembly product with XpressDox.

The reference to working with existing templates is a good point at which to mention that XpressDox has a robust feature set, providing the ability to automate your template environment far beyond the basics of form completion and selection from simple lists. But to take advantage of this level of automation, you will want a template developer driving the bus, by which I mean someone with a mind for programming and data sets. If you have such a resource on staff (which I assume is the case for all large firms), they should be able to develop a growing comfort level with XpressDox quicky thanks to the ease with which you can create basic templates. And from what I determined by poking around, building on the basics to

slowly add additional functionality is not only easy, but forgiving (as I discuss in more detail below).

My net takeaway on the feature set is that XpressDox is incredibly feature rich. Dense might be the better descriptor. With all of my exploration, my reading on the web site, and my experimentation with building my own templates, I feel like I barely scratched the surface of the possibilities for automation available to me.

And if this feature-rich environment for creating and maintaining templates wasn't enough, XpressDox also has a cloud-based solution for performing all of the above via your web browser and even on your iPad. Wow. What else could you ask for?

STABILITY AND PERFORMANCE

Even as I added Commands — programmatic enhancements that comprise XpressDox's core building blocks (conditional text, counts, date-driven data selections, etc.) — to my test templates while working on this review I did not experience any sense that my failure to completely understand a new Command introduced "bugginess" or instability in the particular template I was building.

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As a consequence I found myself freely experimenting with inserting new Commands to see how they worked and what they could do for me. If an experiment didn't work, I would simply delete everything within the affected nested angled

brackets and move along to the next Command. In short, XpressDox seems well architected and stable. It handled my heavy experimentation well.

XpressDox is excellent. It is so good that it has earned my very first perfect A+ TechnoScore (5 out of 5). It's the most robust document assembly product I have seen.

HELP AND SUPPORT

The web site says "The easiest way to learn XpressDox is to use it." But the company doesn't rely on that suggestion to get you off on the right foot. It provides dozens of entries under the "Tutorials and Cheat Sheets" area of the web site (nicknamed the "Cookbook").

Topics covered include everything from "Moving Around in XpressDox" to "Handling Gender" to troubleshooting problems with data calculations. There is a dictionary of all Commands. And there is a forum in which you can post questions about how to use the product, and conceivably share tips and tricks as well. These resources all proved helpful.

But I will say that I found myself agreeing with the marketing team. Truly the best way to learn the product is to tinker around and try everything out. I liken my experience with XpressDox to getting a new car and eagerly scouring the cockpit to locate all of the buttons for fog lights, side view mirrors, trunk release latches, etc.

WISH LIST

As noted above, XpressDox is full featured and capable. It has all

of the bells and whistles I would personally look for in a template building/document assembly solution. Really, the only thing I can think to suggest that the folks at O2Smart might provide are some video tutorials to augment the large collection of text-heavy supporting documentation.

Ideally, the videos could cover a mix of basic, intermediate, and advanced topics — and give the end user an opportunity to “watch” someone experienced with XpressDox. I find that videos get someone new to a software product more comfortable more

quickly, especially one with such an extensive feature set.

TECHNOSCORE

XpressDox is excellent. It is so good that it has earned my very first perfect A+ TechnoScore (5 out of 5). It's the most robust document assembly product I have seen. It seems to have everything a large firm would need. And yet it is simple to use to create basic templates. All you need to supply is a person at your firm with the requisite experience and skills to take full advantage of XpressDox's flexible template-building toolset, and extract the

maximum value from what it offers. I am hard pressed to think of what the company could add to improve XpressDox further.



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