

Practical Law Canada

Automated Documents

Practical Law Canada Automated Documents, powered by Contract Express, help you to create first draft documents faster. The ability to share information from one document across a suite of relevant documents allows you to produce ancillary documents at the touch of a button.

Select and Draft a Document

1. Getting started

Log into Practical Law Canada using your OnePass.

Standard Documents with document automation functionality will show a feature box with a **Start drafting** button at the start of the document content.

Note: You can also select from a list of Automated documents available on the Practical Law Canada Automated Documents page.

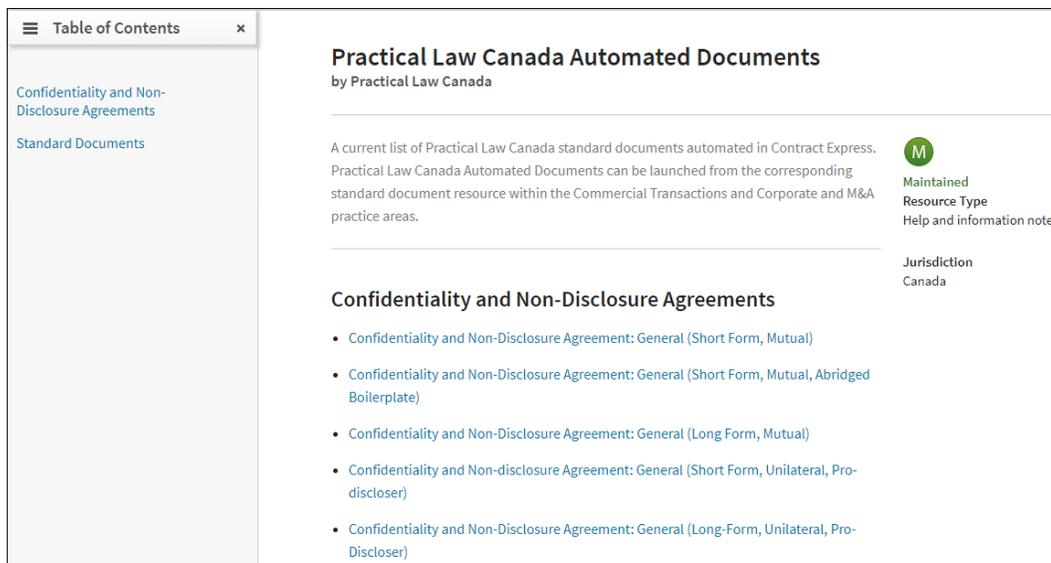


Figure 1: Practical Law Canada Automated Documents page

Once you have selected a document, select the **Start drafting** button to enter the document automation environment.

Confidentiality and Non-Disclosure Agreement: General (Long Form, Mutual)
by Practical Law Canada Commercial Transactions

A standard long-form mutual confidentiality or non-disclosure agreement (NDA) to be used in connection with commercial transactions that contemplate the exchange of confidential information by both parties. This Standard Document has integrated notes with important explanations, including drafting and negotiating tips.

Practical Law Automated Document Powered by Contract Express
Create a first draft of this document by answering a series of questions written by Practical Law editors. Included in your Practical Law subscription. [Learn more](#)

Start drafting

Note: Read This Before Using Document

Maintained
[View Resource History](#)
Resource Type
Standard documents

Jurisdiction
Canada

[Related Content](#)

Figure 2: Start drafting button

The questionnaire guides you through entering all key data into the document (such as buyer and seller details), as well as creating the major changes to the document (for example, whether you wish to insert a severability clause).

Note: A progress bar appears in the top left corner, indicating the level of document completion.

← Previous → Next Preview View Save & Close

1

For more information, see [Drafting Note, Preamble](#)

Party 1

Name:

Jurisdiction of incorporation/formation?
-- Please Select --

Entity Type:
 corporation
 limited partnership
 Other

Street address and Unit/Suite number:

- Obligations of Confidentiality, Non-Disclosure and Non-Use
- Further Confidentiality Obligations
- No Representations or Warranties
- Required Disclosure
- Parties' Representations and Warranties
- Return or Destruction of Confidential Information
- Non-Solicitation
- No Contact

Figure 3: Progress bar

2. Navigating within the document while drafting

To move to the next section, use the **Save & Continue** button at the bottom of the page, or the **Next** or **Previous** links along the top of the page (the information you input will be automatically saved).

The screenshot shows a document drafting interface. On the left is a table of contents with sections like 'Read this Before Using Document', 'Preamble', 'Recital', 'Confidential Information', 'Obligations of Confidentiality, Non-Disclosure and Non-Use', 'Further Confidentiality Obligations', 'No Representations or Warranties', 'Required Disclosure', and 'Parties' Representations and Warranties'. On the right is a form with fields for 'Province' (a dropdown menu), 'Postal Code', 'Country', 'Does Party 2 have a fax number?' (radio buttons for 'Yes' and 'No'), and 'Email Address'. At the bottom center is a dark blue 'Save & Continue' button. At the top right are navigation links: 'Previous', 'Next', 'Preview', 'View', and 'Save & Close'. Red circles with numbers 1, 2, and 3 highlight the 'Save & Continue' button, the 'Next' link, and the 'Previous' link respectively.

Figure 4: Save and Continue button and Next/Previous links

3. Previewing while drafting

Select the **Preview** option in the top-right corner to view the questionnaire and draft view concurrently, and make real time changes.

This screenshot is identical to Figure 4, showing the same document drafting interface. However, the 'Preview' link in the top-right navigation bar is highlighted with a red circle and the number 1.

Figure 5: Preview link

Note: The Preview feature is intended to give an approximate view of the document. It is not intended to represent the final, finished version. To see how the end document will appear, users should download the Word version. Formatting and layout are automated, so page breaks, hard returns, etc., will all be correctly displayed in Word.

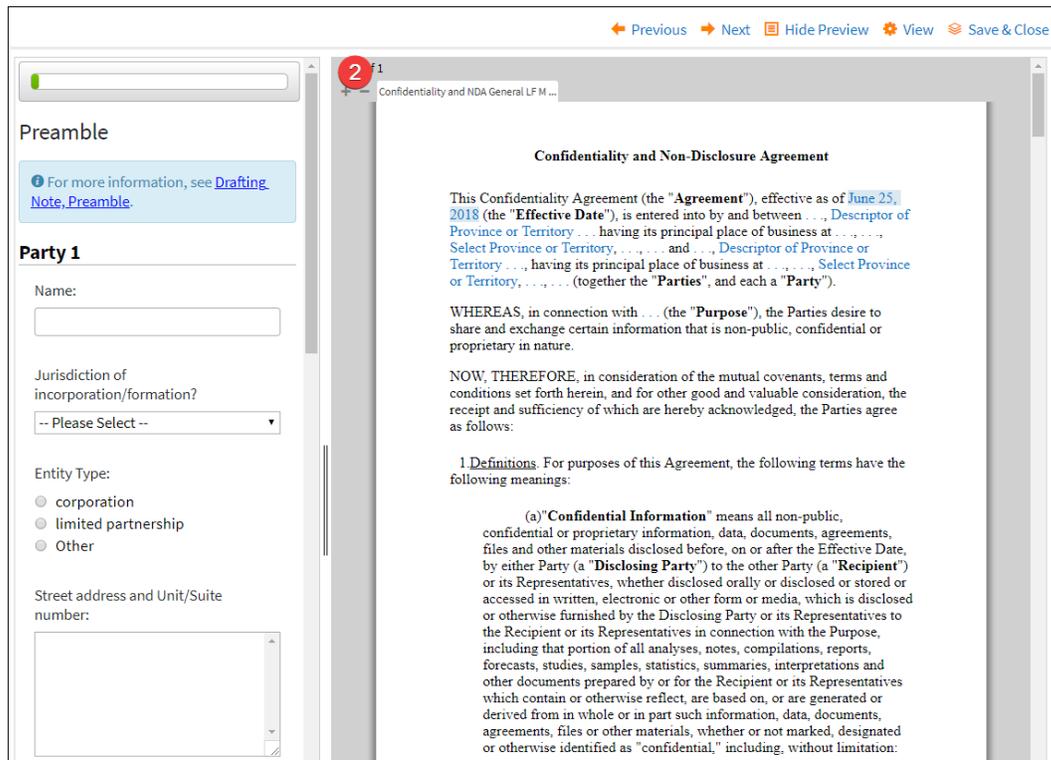


Figure 6: Preview mode

In Preview mode, you can answer the questions appearing in the panel on the left-hand side, and see the document draft changes in the panel on the right.

When answering a question, the corresponding section of the document where the changes are being made is highlighted in the panel on the right.

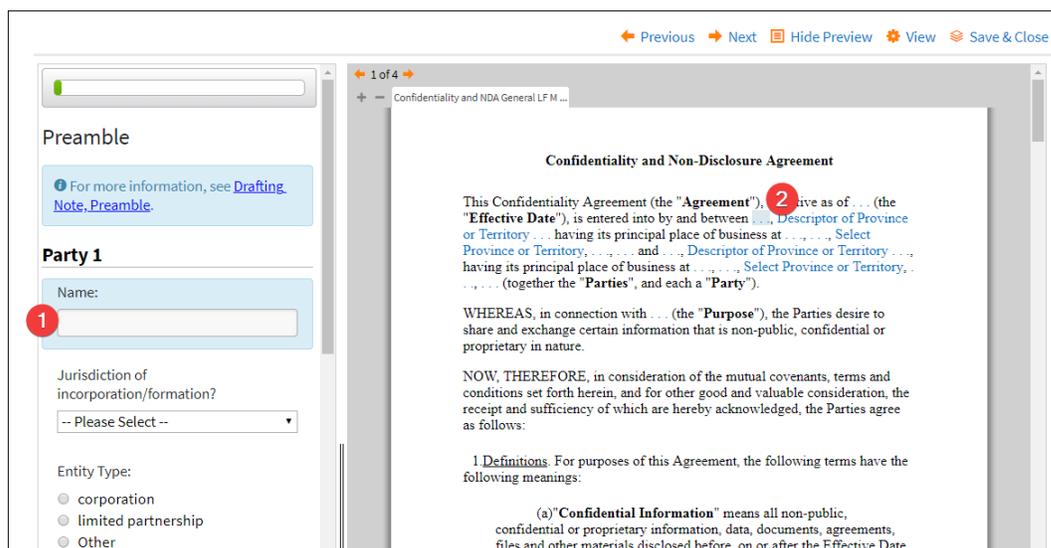


Figure 7: Preview mode showing questions on left and corresponding answers in document on right

Navigate through the pages of the questionnaire using the **Save and Continue** button or the **Next** or **Previous** links.

4. Document view options

There are several view options available when working with your document. Use the **View** pop-up in the top right corner to select your preferred content, conditional wording, and presentation options.



Figure 9: View link

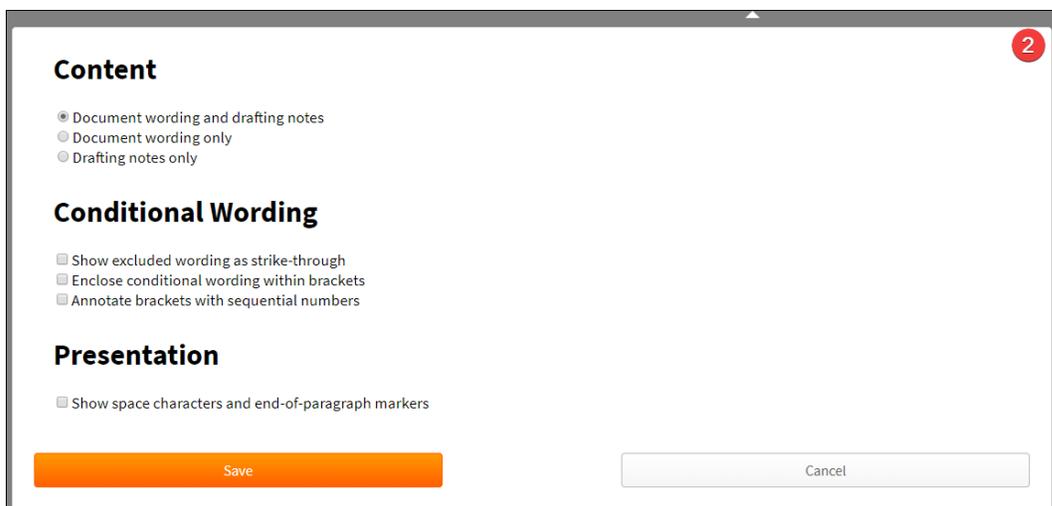


Figure 8: View options

5. Finalizing your draft document

Once you have finished filling out the questionnaire, select the **Save and Close** link in the top-right corner above the document draft view.

You will be taken to the document summary view page. From this page, you can:

1. **Download the Word version** of the document by selecting on the document name.
2. View the document creation and update history in the **History** section.
3. View any previous versions of the document by selecting the **View Versions** button.
4. Return to the questionnaire or draft view by selecting the **Edit Questionnaire** link below the header ribbon.

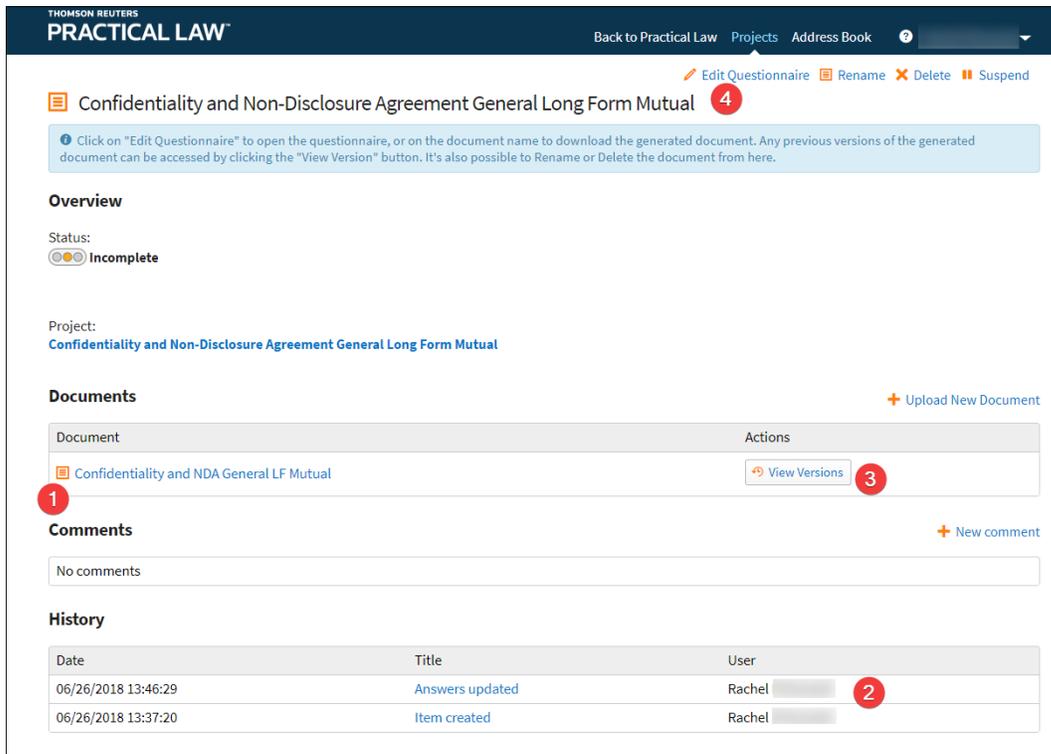


Figure 10: Document Summary View page

To create additional documents, select the hyperlinked **Project Name**. A **New Document** option becomes available from that view.

Access and Use Previous Projects

You can access your previous projects from within Automated Documents. Select the **Projects** link on the welcome screen. You will see the listing of all your projects and folders (including Archive) in the Dashboard. Projects are displayed in alphabetical order, and you can also search by keyword.

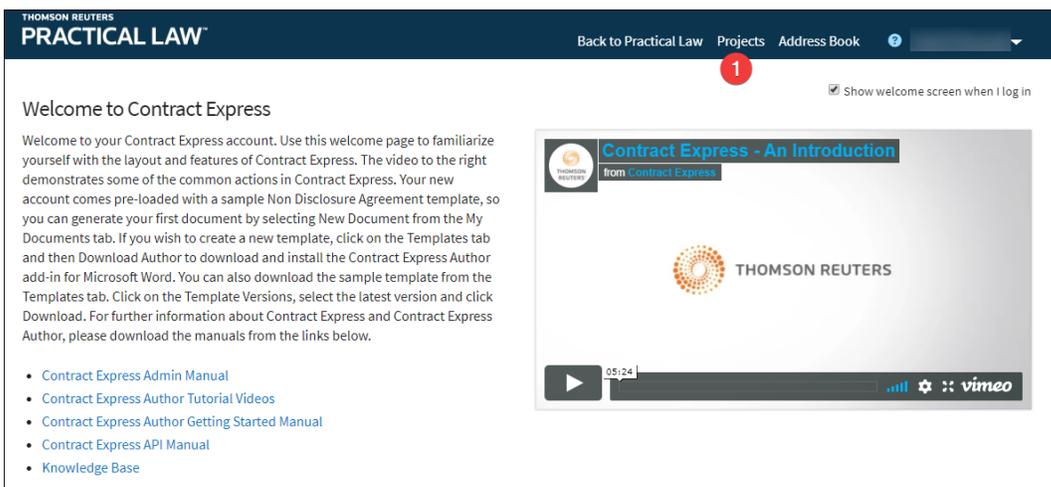


Figure 11: Projects link

Create and Manage Folders, Projects and Documents

1. Project dashboard

Documents which you have started drafting from Practical Law Canada Automated Documents are known as projects.

The Project dashboard displays the list of all your folders and projects, allowing you easy and structured access to already created documents. Select the **Projects** link in the top right corner of the page to access your dashboard.

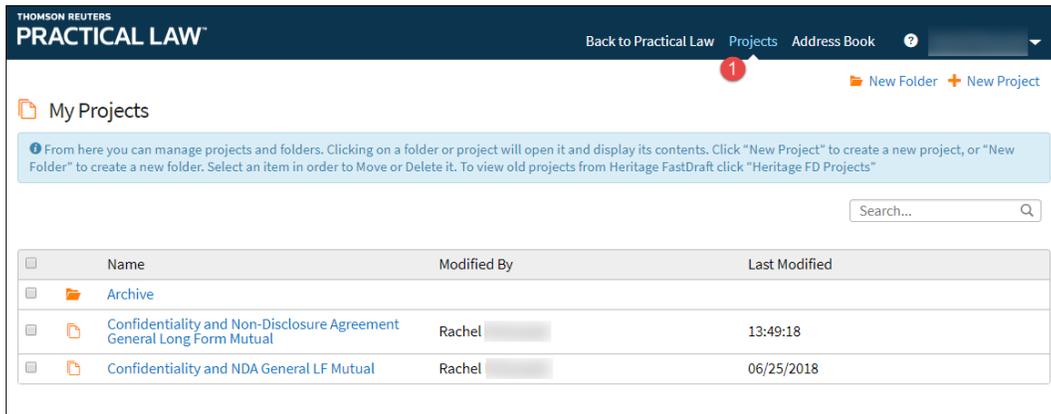


Figure 12: Project Dashboard

To create a new document from within the Practical Law Canada Automated Documents interface, select the **New Project** link in the top-right corner. From the template page that appears, select a template you have recently used, or a different template from Practical Law Canada Automated Documents, and start drafting.

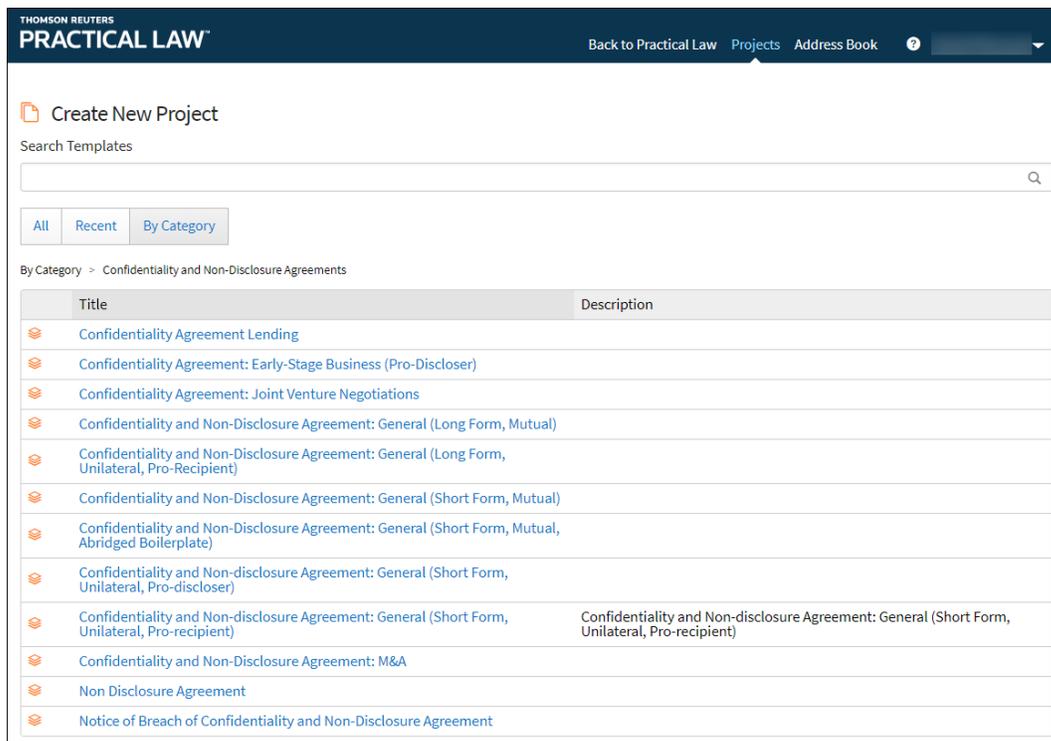


Figure 13: Template page

Note: The project and selected documents are automatically saved with a default name; you can change the naming convention by using the **Rename** buttons in the project or document views, respectively.

2. Folders

You can manage your workload more efficiently by moving completed Projects, or those associated with a particular client, to a folder. To create a new folder, select the **New Folder** link in the top-right corner, and name the folder when prompted.

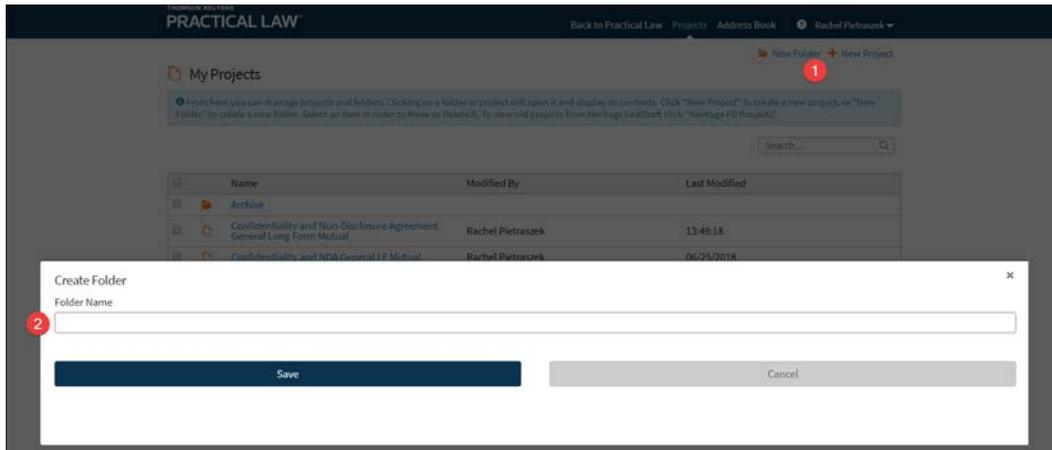


Figure 14: New Folder

All folders are listed in the Dashboard view at the top of the contents list.

You can move selected Projects into folders. Tick the box beside the project name, and select the **Move** option, which will become visible below the header ribbon. The list of available folders will be displayed. You can then select the required folder by selecting its name, and selecting **Save**.

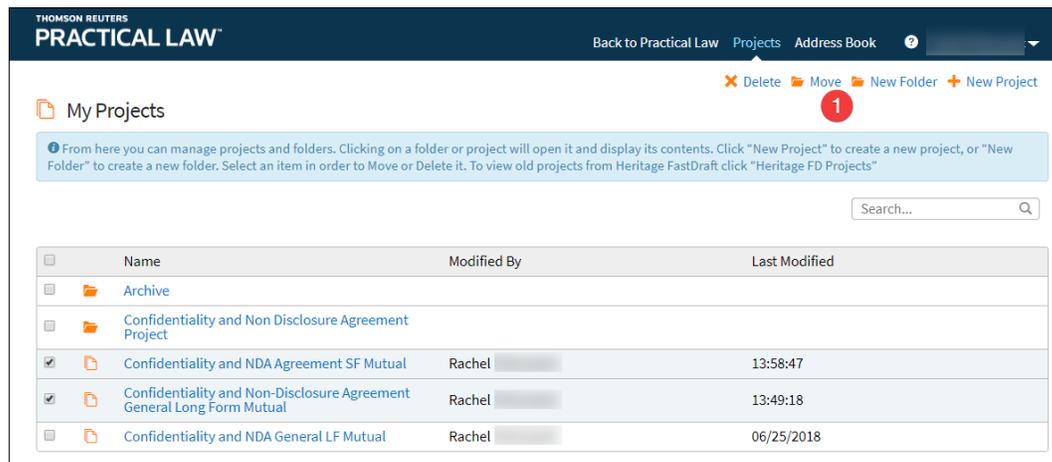


Figure 15: Projects folder

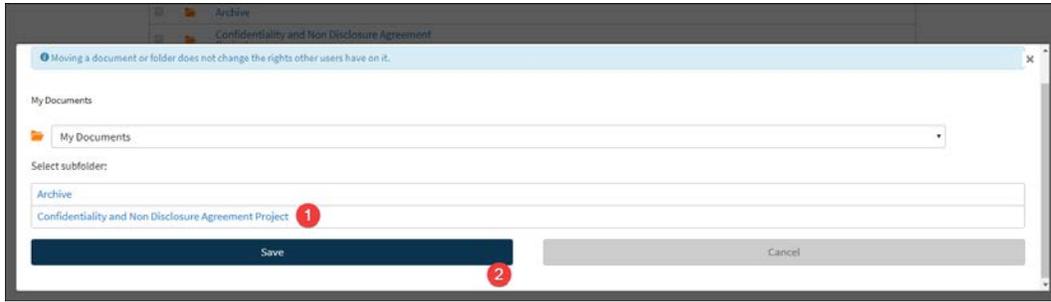


Figure 16: Project folders

3. Archive your projects

To manage the project list more efficiently, users can archive old or inactive projects listed in the Project Dashboard.

First, select the project by ticking the box beside its name. Then select the **Move** option, which will become visible below the header ribbon. A popup box will appear with suggested locations, including the Archive folder. Select the required folder by selecting its name, and then selecting **Save**.

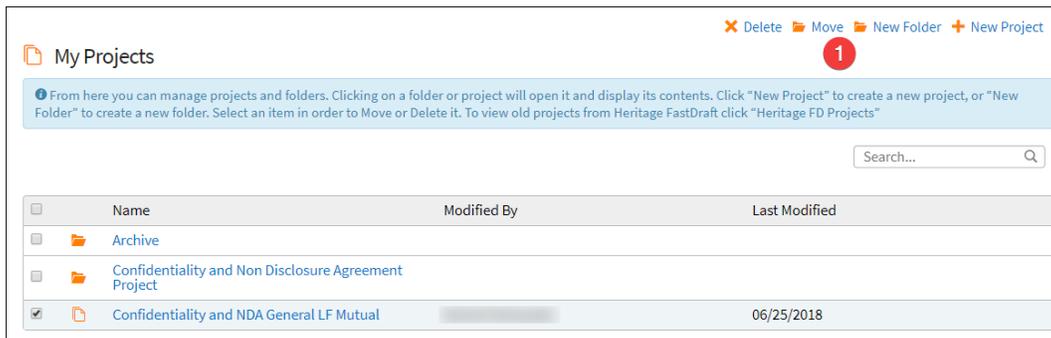


Figure 17: Project Dashboard

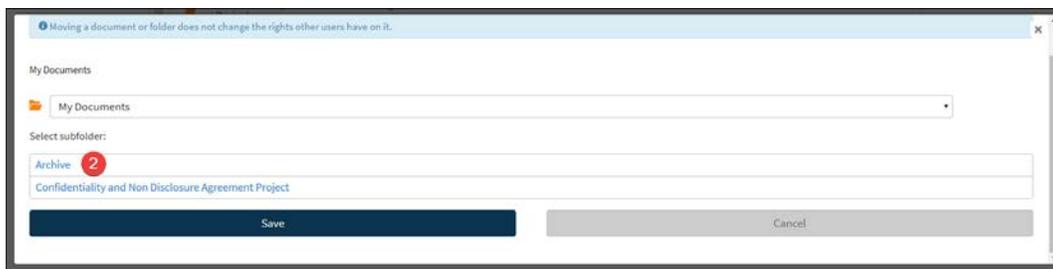


Figure 18: Archive subfolder

Further Assistance

Customer Service

Our customer services team is available weekdays 8:30 a.m. to 4:30 p.m. (ET)

Email: plorders.legaltaxcanada@tr.com

Tel: 1-844-717-4488

Request Training

No matter where you work in Canada, you can now benefit from training with a Practical Law Canada Learning Consultant.

Email: customerlearning.legaltaxcanada@tr.com

Tel: 1-800-387-5164, option 3

Ask a Question

If you can't find a particular resource, or have a query about something we've written, contact us by selecting the **Contact the Team** button.

Email: ca.practicallaw.thomsonreuters.com