

Law Firm Software Foundations

By JoAnn L. Hathaway

More is less when it comes to software for law firms. Collective minds differ as to which software is necessary, but few dispute that these three types are essential for every firm.

Productivity software

Microsoft 365

Microsoft Office is the software of choice for most law firms. Its most recent offering, now called Microsoft 365, is chock full of features. My conversations with attorneys confirm that more and more are signing up for this package, and in follow-up conversations are providing excellent reviews. It seems clear that Microsoft really wants users to go to the cloud, evidenced by the many attractive 365 packages it offers.

With subscription models ranging from \$5–\$35 per month, users have a wide selection of options.

At \$35 per user per month, the Enterprise Plan may seem steep, but it has many features attorneys will love. Examples include compliance and information protection, rights management, data-loss prevention for email and files, and e-discovery tools.

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For those who need email encryption, Microsoft has released Office 365 Message Encryption, which allows users to send encrypted emails to people outside of the firm, regardless of the destination (Yahoo, Gmail, etc.) This add-on is \$2 per user per month.¹

A few of Microsoft 365's lesser-known, but very helpful, features include Groups, Flow, and Forms. In his article in the January/February 2019 *Law Practice* magazine published by the ABA's Law Practice Division, Office 365 guru Ben Schorr highlights a few advantages:

- **Groups:** This feature allows you to create a group for multiple people working on a large matter. You can share an inbox; add events, meetings, and deadlines to the shared calendar; collect resource notes and research in OneNote; and upload documents and files to the shared document library.
- **Flow:** With this service for automating workflow processes, the possibilities are endless. One example is creating a flow that automatically adds a task to your calendar when receiving an email from the court. Microsoft.com has a variety of templates and learning resources to get you started with Flow.
- **Forms:** This feature lets you create surveys, intake forms, questionnaires, and

so on to distribute, and automatically collects results. At forms.office.com, you can get started building easy-to-use forms right away.

PDF creation/manipulation software

Adobe Acrobat

Most people are familiar with Adobe Acrobat, but many think of only Acrobat Reader, not being aware of the expanded Acrobat family. The latest version includes its Document Cloud services, which allow users to create, review, approve, and sign documents from any desktop computer or mobile device. You can also start working on a document on one device and finish up on another.

Acrobat DC is a powerhouse with features attorneys love. It has Bates numbering, redaction, password security, PDF conversion to Word documents, document permission controls, and more.²

Acrobat DC is offered only as a subscription model. The Standard plan is \$12.99 per month per user and includes 20 GBs of cloud storage.

Adobe still produces the standalone version of Acrobat Pro 2017 for the substantial price of \$449. Acrobat Standard is \$299.

A recent addition to Acrobat DC is an enhancement of the Compare Documents

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tool. The sleek, efficient tool allows for digital signatures and certification and verification of documents with a Certificate ID.

Acrobat DC also includes the ability to capture a user's signature via a mobile device and e-signatures from other users, tracking responses in real time. The e-sign feature, which is free, integrates with Microsoft 365, letting users send documents for signing and monitor signing status in Word, PowerPoint, and Outlook.

If you select Acrobat, I believe it is imperative that you get training or at least sit through a demo to digest the full functionality of the application. I have found that many attorneys and staff have no idea what they can do with PDFs in Acrobat. Given Acrobat's hefty price tag, purchasing the software and not using it to its full potential is not a good investment in my opinion.

Power PDF

A cheaper alternative to Acrobat is Power PDF Advanced 3 by Nuance. At approximately one-third the price of Acrobat, it has Bates stamping, allows for custom profiles, and includes an assistant function to convert pleadings into PDFs with stamp and line numbering options. It also includes redaction, password security, and document permission controls. Power PDF integrates with cloud-storage providers, and a new feature can convert PDFs to Word documents. It integrates with DocuSign for securing electronic signatures and allows for document collaboration in real time with multiple people on the same network.

At \$179, Power PDF Advanced 3 is an attractive package for attorneys.³

Security software

If your computers are standalone, non-networked units, an internet-security software suite is the best option for you. Norton is popular, but most tech consultants don't recommend it because it's not easy to use, its threat blocking doesn't compare with other products, and it's reportedly difficult to uninstall. Also, Norton and McAfee (other major contenders) tend to put a heavy load on computer processors when compared to the competition.

Webroot SecureAnywhere Internet Security Plus is an excellent product with fire-

wall, antivirus, antispyware, rootkit detection, antispam protection, and more. It also allows users to remotely locate, lock, or wipe lost devices, and it's available for about \$45 per year for three users and \$60 per year for five users. One license allows users to install the product on as many as five devices (cost changes).⁴

Conclusion

For more information on these or other software applications, contact State Bar of Michigan Practice Management Resource Center Advisor JoAnn Hathaway at (517) 346-6381. ■

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ENDNOTES

1. Microsoft, *Microsoft 365 Enterprise: Comparison Table* <<https://products.office.com/en-us/business/compare-more-office-365-for-business-plans>>. All websites cited in this article were accessed February 23, 2019.
2. Adobe, *Acrobat Pro DC Features* <<https://acrobat.adobe.com/us/en/acrobat/features.html>>.
3. Nuance, *Power PDF Products* <https://www.nuance.com/print-capture-and-pdf-solutions/pdf-and-document-conversion/power-pdf-converter.html#standardpage-mainpar_multicolumn_copy_cop>.
4. Webroot, *Products* <<https://www.webroot.com/us/en/home/products/compare>>.



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