1. Compare Documents.

Despite all the great new functionality that provides version control for folks inside a company, the fact remains that collaboration today still happens between people in different companies and they aren't able to leverage that functionality with people outside their firewall. Files get re-named to suit individual firms' naming conventions, and you lose the ability to track those versions. As if that's not enough, you can't tell who-changed-what because lawyers will PDF the changed documents (to strip out properties) rather than working with Track Changes in Word, which would allow you to see everything that's been changed and accept/reject/comment on those changes.

You can get around these problems with the intelligent use of Word 2007. Word 2007 now provides great functionality to Compare Documents. Unlike previous versions, which I found were confusing, the new approach is very simple. You just fill in or browse to the name of the 2 files you want to compare, then Word will display those 2 files PLUS a version that includes the first file, annotated to show the deltas compared to the second file. From a single Window, you therefore have 3 panes, and you can see at a glance the 2 original documents, and the annotated document. Getting a little more fancy, you can attribute deltas between documents to an entity by adding the entity's name against each document. Word then knows who created what changes.

But what if the 2 documents you're comparing are in PDF, not Word? This brings us to our 2nd tip.

2. Working with PDF documents.

You may be aware that Word 2007 allows you to convert from Word to PDF with just one click (go to menu item Acrobat from your Home menu, then press Create PDF), so you no longer need to buy advanced copies of Adobe to do this, or to print to PDF using some other software. It's all there in Microsoft Word 2007 already. But how do you work with PDF documents? Easy. Foxit Software has a $40 software solution available to you (see Syntapa.com – reseller of Foxit Software) which allows you to redline, add comments, fill-in PDF forms, etc…. on PDF documents. They also have a server product that will sniff out all the PDF's on your computer or on network shares and will convert these to indexable PDF which SharePoint can "talk to", so that you can do full text searching of all documents, including your PDF's.

But there are times when PDF is just not a good format to work with documents, you want Word. No problem. You can go at this the long way and use Foxit's text stripping functionality to copy all the text from your PDF into a Word document, and from there, use the Word redlining capabilities. Formatting of the document re-created in Word is a bit of a nuisance, so you can use other software to do the PDF to Word conversion. There are many of these on the market, including a free one (just Google on Free PDF to Word conversion).

3. Version Control.

Version control is what allows you to see what's happened in the life of a document. Microsoft's SharePoint functionality, which is embedded in Syntapa's Matter Management solution, simplifies the life of busy lawyers who make modifications to documents and need to understand what changes were made when and by whom. Rather than asking people to follow a naming convention for naming files and keeping all the versions of those files in a network share so that you can recreate that document's history over time, the SharePoint version control allows you to simply save the file, without changing its name. SharePoint will keep track of the changes, who made them, when they were made, and it will show you that history with one click of a button. Simply click on the drop-down list next to the document in SharePoint, and select Version History. There you see it. All the versions with the relevant details such as who modified the file and when. If you want to actually retrieve an earlier version, just move your mouse over to that version and click enter. It comes up. If you are finished with your negotiations and want to get rid of all the prior versions of the finalized document, you simply delete any or all of the prior versions. If you made a mistake, no worries, all your deleted documents first go to the SharePoint recycle bin, so you can go there, see your "deleted" files, select the ones you don't want deleted, and click Restore. They are now again part of the document's original version history. How lawyers can work without this functionality, I don't know! Each document also has an auto-generated unique numbered identifier, so a quick search on that number (which is visible in the footnote of the document's printed page) leads you right to the electronic copy of the document for a quick way to link between the printed documents and their PDF or Word associated electronic version.

4. Create Matter page.

Let's say you're working on a team effort, like a due diligence project, and many people in the firm are contributing to the project. Wouldn't it be nice to have everything tied to this Matter available to you at a glance, whether it's the emails, the documents, the templates, the people involved, the record of phone conversations, the location of "offline" content, etc…. Syntapa's Legal Matter Management solution provides just that. You simply create a Matter, link it to a Client, and start adding content. That content is stored in its native format, so that means that, for example, when you click on an email, you see it as it would look exactly as if you had opened it in Outlook (not surprising, it actually does open using Outlook!), including its attachment. Due to the smart integration that Syntapa has built with Outlook, you don't need to separate the attachment, file it separately, then try to remember which attachment was sent with which email. All this is handled directly by the solution for you, which means it's also reliable for compliant record-keeping. The Outlook integration allows you to work in Outlook as you normally would, and from there, simply right click on an email to attach it to a Matter, from a dynamically created dropdown list of your current clients and Matters. If you're worried you'll forget to attach your emails to a Matter, no worries. Default settings are set to remind you to attach the email to a Matter on sending, providing you with the list of clients and matters at that time.

5. Searching.

Let's face it, most lawyers file their documents right within Outlook or in their Windows files, using the most basic filing structure of Client, then Matter. Nothing wrong with that. In fact, that is the basic filing structure of Syntapa's Legal Matter Management solution. However, what makes the Syntapa solution so great is that, based on SharePoint's powerful search functionality, you can have the system find the document you're looking through the full-text simple or advanced search functionality. The Google-like display of search results lets you quickly see and link to the content you're looking for, and instances of the keyword you searched on will be highlighted for you to speed up your review. With Advanced Search, you simply string conditions by filling in the blanks for the parameters available to you in the context of what you're searching for. You can first filter the results by selecting the right type of content you're searching against. So, rather than forcing lawyers to work through a lexicon of subjects, training the entire staff and trying to enforce filing of documents so that things can be found, or worse, relying on file names to actually identify content, you let the search technology work for you. Indexing occurs automatically shortly after any content has been attached to the Matter, so the search is almost instantaneous, and voila! You have what you were looking for without regard for where you might have placed or misplaced it. This is important to note. You don't need to even place a document in a particular Matter page to find it – search happens across the entire database of documents, it's just a must-have for lawyers.

6. Planes and cottage country. You want to go away for the week-end, or you're stuck on a plane a lot. So come Friday afternoon, you make a mental note of the files you want to copy to your hard-drive so they're accessible to you while you're offline. You copy them to a temporary directory, or a replica of your file structure online, and quickly, you lose your grip on what version is the right version, where you copied what, and what was it called again??? No need for all that. With Syntapa's Legal Matter Management solution, offline work is supported. You simply go to your Outlook, select the Documents icon added in by the Syntapa solution, and you get a dropdown list of all your clients, then all the Matters for the selected client. You can then select all or some of the documents and "check-them-out". That means that people accessing those documents on-line will be able to do that, but they will have read-only access to them. If they want to edit, that's ok, they simply need to save the document under a new name. Meanwhile, you can access your documents offline, again by pressing the Documents icon, selecting the file, and clicking on it. When you're connected again to the office, you'll be able to "check-them-in" and the changes made will be kept as a new version, with the full version control functionality we mentioned earlier. No more need to think about which memory stick or directory you copied your files to!

7. Conflict checking. Do you find it increasingly hard to identify potential conflict situations? With the Syntapa Legal Matter Management solution, the contacts "pool" is shared by all (unless you want to restrict it, and that's easy to do), and what each lawyer does is select from that pool and attach "involvements" that people have against any given Matter. So, for example, you can select "responsible attorney", "expert witness", "defendant", "opposing counsel", "judge", etc… from the dropdown list of possible involvement types against any contact record. Then, you can view information in different ways. You can look at By Involvement, By Contact. Or By Matter By Involvement, or simply do a Search or Advanced Search with a contact name and see how a particular contact is involved in different contexts/Matters before you assign a new involvement to a contact. That way, you avoid possible conflicts. What a great way also to view at a glance who's working on what Matter, who's knowledgeable in what subject area, etc… This is a great resource-management tool for the firm in addition to use in conflict checking.

8. Alerts.

Are you finding it difficult to stay on top of all your files? Do you want to know when someone has created a new Matter (perhaps you have a process to ensure that a new Billing number is first created whenever lawyers start a new Matter for a client?), do you want to know when a new version of a document has been created? With Syntapa's Legal Management solution, you can create alerts on documents, or Matters pages which are of interest to you and for which you want to receive alerts (either through RSS feeds like any other RSS feeds or through emails) whenever the content is changed. You can define what you mean by "changed", e.g. changed by someone else, content added, etc… So, rather than "pulling" new information from the system, the system will "push" out new information to you based on your choices so that you are automatically notified of changes.

9. Surveys.

We think of surveys as long forms to seek input, but Syntapa's Legal Matter Management solution exposes SharePoint out-of-the-box survey functionality to you and provides a quick and simple way to do more than the usual once-a-year survey. Creating a survey is sooooo easy, you'll want to use this to poll your staff for all the mundane things that end up taking way too much time when working with emails. If you're the administrator and you want to find out what supplies need to be re-stocked, use a survey! You create a survey by selecting a question "type", putting in your question and the list of possible answers (including free form), and selecting your "audience", which can be groups of people, or all. Choose to have a link and an announcement of the survey shown on the home page of the Legal Matter Management solution, and people can click through in 20 seconds and tell you what they need. You can then view the results graphically, with or without a view into who-answered-what, and you can also view each response individually, in a table. That table view can be exported to Excel with one click, and voila, you have a spreadsheet you can work from if you want to use this as a starting point for other uses. Use it to vote on serious or not-so-serious things, like the theme for your annual party, why not!

10. Policies/procedures/Reference docs/templates.

Access to information is so key to lawyers' day-to-day work. It is nice to have all your information close-at-hand, and you can think of the Syntapa Legal Matter Management solution as more than just a repository for your case-specific information. Tabs have been built-into the solution so you can upload/access all those useful sources of information, whether that's your firm policies and procedures, reference documents, useful web links or templates. Note that in addition to accessing your templates from a Templates tab, you also have a drop-down of all your templates each time you create a new document in Microsoft Office from the Create New Document. You can start a clean new document, but it's also nice to have right at your fingertips all your templates to choose from. The templates are typically "locked" so that they can't be modified except by selected users, so you need not worry about unapproved changes to templates.

Syntapa's Legal Matter Management solutions are aimed at small and medium sized law firms and corporate legal counsel office. For a Live Meeting demo or further information please contact Julie Pfahl at jpfahl@syntapa.com 613 591-7644 ext 222 or browse to www.syntapa.com. Syntapa Technologies is a Microsoft Gold Certified Partner and reseller of Microsoft and Foxit Software in addition to its own solutions for legal/regulatory and association customers.