

Microsoft Office 365 And The Law Office

By Russell Jackman, Esq.

Personal Intro

- Law Practice Management CA St Bar 1994-1999
- Providing Legal Technology Support as a business since 2000
- MCLE Lecturer (1994-present)
- Professor Computer Applications to Paralegals, Cal St Hayward 2002-2005
- Member: Business Network International (1999-present)
- Owner: Linked Local Marin (8,700 members)

Office 365 vs “Standalone”

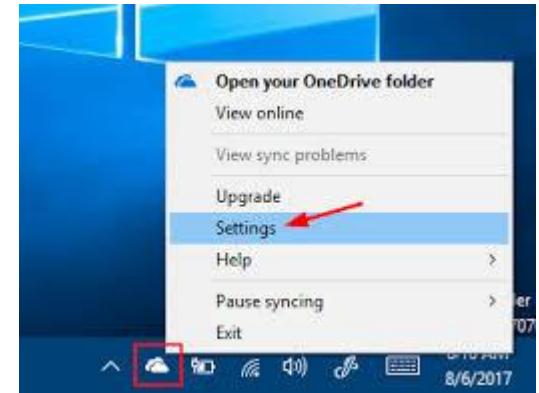
- Online (Office 365)
- Standalone
 - Home & Student
 - Word, Excel, Powerpoint
 - Home & Business
 - Outlook included
 - NOT automatically updated to newest version
 - One Time Price=cheaper over time
 - Standard use, does not use internet or OneDrive

OFFICE 365 FEATURES

- Online versions of Word, Excel, Powerpoint, Outlook
- ONE DRIVE
- Sharepoint
- Teams
- Publisher
- Access

ONE DRIVE

- Simplified version of Sharepoint
- Built into Windows 10
 - (cloud on lower right hand side or under apps)
- Automatic file sync
- Can download local copies wherever you sign in
- Work offline, sync, have local power & online cloud power
- Strong security, assurance of service with MS
- Mass storage is inexpensive



How One Drive works

- Sign into Windows Account from start
- Sign into a shared office account once windows starts
 - Cloud on lower right side, “sign into account”
 - Can add multiple accounts
 - Once signed in, OneDrive shows on left side of file explorer
 - Easy to save, easy to find documents
 - Search locally or search online
- Syncing means all documents in OneDrive on computer also on cloud

One Drive for Business: Advantage=Encryption

“when your data is in transit, it is encrypted as data moves between you and the datacenter and between the server and the datacenter, which uses 2048 bit keys. However, the encryption technology applies not only when the data is moving between servers or datacenters, but also when the data is at rest. When data is at rest there are two types of encryption that are used: Disk encryption and File encryption.

At the disk encryption level, BitLocker is used to secure data and at the file encryption level, every file is secured with its own key that uses Advanced Encryption Standard (AES) with 256-bit keys and is Federal Information Processing Standard (FIPS) 140-2 compliant.”

File-level encryption

Encrypted Files



Microsoft Azure Storage Containers



Key Store



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How Firms are using One Drive

- Individual log ins vs “Firm Login”
- Individual Log ins- more file control
 - Requires someone to designate file access
 - Great for controlling temp worker/outside counsel
 - Time intensive, can be too restrictive
- Firm Login: 1 “generic address” that everyone uses
 - Everyone has access to the same files
 - Easy collaborative work
 - Great solution for small firms that want an inexpensive, easy “file repository”

Office 365 Mobile

- Works great for phones and TABLETS (IPADS)
- Don't have to download the programs
 - Work with everything online
- Don't have to download files
 - But you can if you want, much easier to edit online
 - Never have to worry about where the source file is
 - Basically like having a VPN (Virtual Private Network)
 - Use the power of the internet vs the power of your device

Office 365 Groups

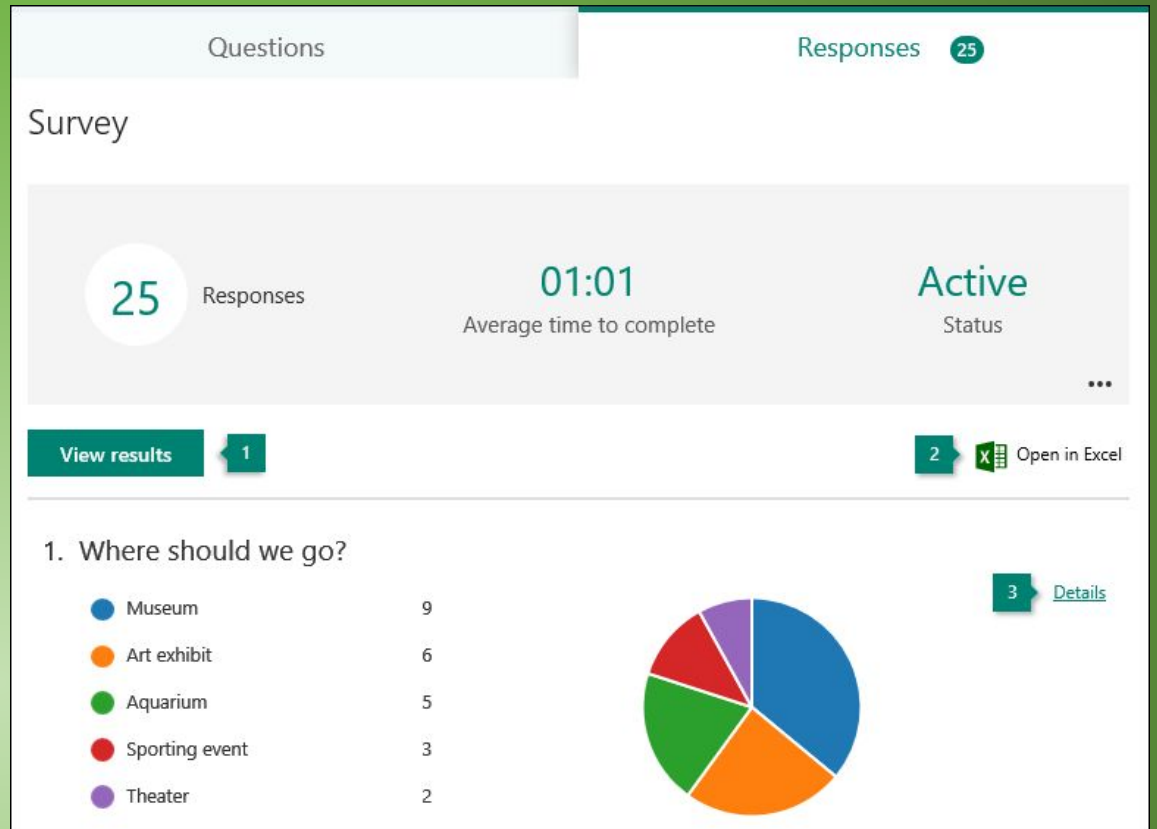
- When you create an Office 365 Group, you select people to be members of that Group and Office 365 will create a set of resources for those people to share.
- A shared email inbox, with its own email address. This is where Group conversations can occur. Members can also choose to get copies of the messages in this shared inbox sent to their personal inboxes. The Group's email address can also be used as a central receiving point for things like court notices or relevant newsletters.
- A dedicated calendar for events and meetings relating to the Group. Members can access this calendar through their personal Outlook or via the web browser.
- A shared document library where members can store, share and collaborate on all sorts of files relating to this Group.
- A OneNote notebook specifically for the Group. This is a great place to collect notes, gather research and share information.
- A SharePoint team Site for the Group. People have written entire books on using SharePoint for collaboration and communication, but suffice it to say it's a powerful platform for sharing information with your team, clients, co-counsel, etc. SharePoint lets you create document libraries, lists, workflows and other web apps that you can use both inside and outside your firm.
- A Microsoft Planner plan. This is a web-based task and project management system that lets you create, assign and track tasks related to the Group.

Office 365 Groups Continued:

- **How would you use this?** You might create an Office 365 Group for a large matter and add the people in your firm who are working on that matter—the attorneys, paralegals, assistants, support staff and more. Those users can use the shared inbox to discuss the matter; add events, meetings and deadlines to the shared calendar; collect resources, notes and research in the OneNote; and upload documents, pictures and other files to share and collaborate on to the shared document library.
- If you have outside co-counsel, or experts, you can add them to the Group as well.
- All of these resources can be accessed by your team members from wherever they are (as long as they have internet access), on any device they're signed in on—PCs, Macs, smartphones, tablets ... just about anything.

Office 365 Forms

- Can create forms to get client input
- Can create quizzes to get client input
- **View summary information for your form**
- After you create your form, adjust its settings, and share your form with others, it's time to view the results. In Microsoft Forms, open the form for which you want to review the results, and then click the **Responses** tab.
- Across the top, you'll see summary information data about your form, such as number of responses, average time it took for responders to complete your form, and form's current status.



	A	B	C	D	E
1	Start time	Completion time	Email	Name	Where
2	2/1/18 1:12 PM	2/1/18 2:32 PM	JasonFabian@contoso.com	Jason Fabian	Museum
3	2/1/18 1:18 PM	2/1/18 2:56 PM	ByronThames@contoso.com	Byron Thames	Art exhibit
4	2/1/18 1:19 PM	2/1/18 4:19 PM	RogelioSalerno@contoso.com	Rogelio Salerno	Aquarium
5	2/1/18 1:33 PM	2/1/18 1:45 PM	AbigailMcDonald@contoso.com	Abigail McDonald	Sporting event
6	2/1/18 1:34 PM	2/1/18 5:06 PM	ShariNixon@contoso.com	Shari Nixon	Theater

Reasons why Office 365 is popular with business

- 1. Mobility and scalability

- The cloud provides the most important facility of mobility, allowing you to work on documents from anywhere and anytime. With Office 365, documents can be accessed from your office, home, a client's location, a coffee shop, and pretty much any other place you can think of.
- If any of your legal team members forgot to bring along copies of important documents, they can always view the most up-to-date version from their cloud storage. They can also access the same document from multiple devices. If they lose some data from the version they are working on, they can simply access the cloud and get the original version of the document.
- Cloud solutions are also very cost effective. The scalability of Office 365 allows Legal firms to add and remove resources as needed to meet operational needs.

- 2. Diverse and modern functionality

- Office 365 products offer a wide range of functionality that legal firms can use to get work done quickly and efficiently. While OneDrive provides online content storage, SharePoint provides content sharing solutions. In addition to its security and compliance features, SharePoint also provides the benefits of version control and full records management. Its metadata model helps you conduct enterprise searches and in-depth legal analyses efficiently.
- And if you need to conduct meetings with team members or clients in different parts of the world, you can easily set up Skype for Business web conferences.

Reasons why Office 365 is popular with business

- 3. Document management

- Some of the most popular tools in the legal profession for content management are iManage and NetDocuments, but Office 365 is also now being widely used. The latest statistics show that Office 365 now stores more than half of all the sensitive data that is stored in the cloud in the form of Outlook email content, Word documents, and Excel spreadsheets. Also, Office 365 products like SharePoint, Exchange, and OneDrive are increasingly being used to save and share documents remotely from any part of the world. These apps help you centralize legal template management and keep a track of how confidential files are being used by team members.
- Keeping up with the industry demands, Microsoft Corporate, External, & Legal Affairs have developed Matter Center for Office 365, which is a SharePoint-based document management and collaboration solution. Matter Center was developed to integrate with existing Microsoft products like Word, Outlook, SharePoint, Delve, Power BI, and OneDrive to provide all their intrinsic features and more. It goes beyond these apps to provide legal teams with new benefits, such as ease of organizing legal documents by client and matter, searching and reviewing legal documents, extensive legal compliance, and management and security features.

Reasons why Office 365 is popular with business

- 4. Security and compliance

- With increasing awareness of security and compliance concerns, many legal firms are transitioning to the cloud. According to an [IT services survey by Clutch](#), 90% of businesses in the USA are now using cloud infrastructure, and overall, 64% of enterprises believe that the cloud is more secure than on-premises systems.
- According to Duane Tharp, Vice President of Technical Sales and Services at Cloud Elements, “The cloud vendor will have good, if not better, security and support for security than any one company. Because of this, moving to the Cloud would increase the company’s overall internal security, as opposed to relying on its IT department only.”
- When selecting the right service, your law firm needs to be sure that its data management systems and data storage have robust security and comply with the latest regulatory requirements. You also need to ensure there are no loopholes that pose a threat to breaches of client data. With the General Data Protection Regulation (GDPR) taking effect across the European Union as of May 25th, 2018, legal firms need to double-check their IT systems and cloud services.
- Fortunately, Microsoft is considered one of the most secure cloud service providers. A few of the legal regulations that Microsoft meets are ISO 27001, EU Model clauses, [Health Insurance Portability and Accountability Act \(HIPAA\)](#), Business Associate Agreements (BAAs), and the Federal Information Security Management Act. Microsoft also provides features like records management, compliance capability, improved threat protection, tracking of unusual activity, information rights management, and much more. Typically, other vendors charge a high subscription fee for these services.
- So exactly how safe is cloud computing? While the cloud does not completely eliminate the risk of data breaches, it does significantly reduce it—at least by minimizing online threats. According to Jason Reichl, CEO of Go Nimble, “Many recent data breaches have been reported incorrectly. For example, the security breach at Target occurred because a vendor who had access to the company’s portal left a computer on and walked away. No one was hacking the Cloud. It was human error, and the Cloud cannot protect you from that.”

Conclusions

- Office 365 works seamlessly with Windows 10
- Not expensive relatively
- Using Internet for power means it works with older machines, phones and tablets
- Strong Security
- Industry Standard
- Short time to learn but has powerful features too
- Will be around for a long time/supported!

Questions? Contact me



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THANKS FOR LISTENING!