

FEATURE COMPARISON

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VENDOR	PAYNE	SOFTWARE INNOVA	ESQUIRE iCREATE	LEGAL MACPAC
Item	Comments	Comments	Comments	Comments
O2K3 Compatibility	Yes			Yes
O2K7 Compatibility	the 2003 version works in 2007; and there is a 2007 version also	v.5.8 - ships in Dec. - certified for 2007 and Vista v. 6.0 - 2nd Qtr. 2008 - direct integration into AD & support Outlook groups; also, all .NET coding	Good compatibility shown in demo. Not comfortable w/ amount of customization applied to the standard O2K7 ribbon.	Yes.
Creating a New Document	Works within the document you have open, or in a new one	Takes over native Word new document function	Create using template manager.	Create using the MacPac 10 task pane
Templates	Works with native Word, and links into any MAPI available to capture names and addresses	Word docs w/ native bookmarks; Should help stop users duping/revising old documents; no need to recreate Macros or learn VBA for O2K7.		Templates have been renamed as content are stored as xml in a database sitting on our server
Templates-User Interface	Single toolbar, or Ribbon, or screen; easy for attorneys to use (or not)	Single screen - no tabs, no wizards; user can set defaults - very handy for attorneys; variety of methods for entering contacts - right-click, shortcut keys, mouse drag	Plus-allows for insertion of contact, client, etc info prior to creating doc. However, several dialogue boxes are used in the process.	MacPac has 2 tabs in Word 2007; the MacPac 10 and Numbering.
Templates-Administration	unknown at this time	Templates can be created by IT in Innova, hidden, and released after testing or released live-users don't need to close/reopen/logoff; easy to manage name, logo, address updates; templates can be securely released only to certain users.	Esquire states that Firm trainers can maintain & administer the product after initial setup.	Templates or content is created by the firms' MacPac administrator.

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Templates-Personal Settings	can set personal choices and customize with Favorites, and commonly used forms, etc.	<p>Can set default entries for dialog boxes - great for attorneys!</p> <p>User can add templates to "Favorites," so doesn't have to look through different folders or long lists</p> <p>User can change personal settings (e.g. name Nicholas or Nick) and everyone will get correct item; IT controls when personal settings override formal settings, i.e. pleadings</p> <p>Assistants like the ability to create easily accessible re-usable templates/favorites for each of their assignments</p>	iEncore option allows user to save doc info for creating future docs for same client, recipient, etc.	Can set favorite content, saved data, and authors.
Templates-Pleadings	Has parts in Forms assistant to work with pleadings	Ships with 6 States (CA, <b>DC</b> , IL, MA, <b>TX</b> , <b>NY</b> ); others can be added; Dialog is linked to venue terms and requirements and has all levels of courts; Federal court data included also; Signature block created automatically from dialog box – fully customizable to include bar nos., etc.; Has utilities for adding line numbers, side bars, borders, etc.	Good support for courts. Can use iEncore to quickly create a new updated pleading w/ old contact/client info.	Pleadings are organized by state, jurisdiction and then court so that a user can quickly find the appropriate pleading.
Numbering	Single toolbar or ribbon with very understandable icons/buttons (with screen tips); can have two or more numbering schemes in same document in '07; in '03 can have at least 2.	<p><b>PROS</b> - Single dialog - no tabs; numbering toolbar ALWAYS shows in 2007 (is not a ribbon - Yay!)</p> <p><b>CON</b> - Doesn't have continuation styles like MacPac, but responsive to idea of adding to future release enhancements</p>	Uses native Word #ing w/ ribbon buttons that are basically shortcuts to existing Word dialogue boxes.	Users can choose, edit and apply schemes, mark and format for TOC all from a toolbar or tab in Word 2007. MacPac Numbering includes continuation styles so that numbered and non-numbered paragraphs are consistent.

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Numbering-User Interface	Very easy to understand how to use; uses native Word's numbering; can use more than one numbering scheme in a document; shortcut keys are same as in native word. Easy to modify the numbering styles; has styles separator; can save your own scheme for your particular attorney or section;	<b>PROS</b> - Paragraph formatting is done using Word toolbars and menus; <u>only</u> numbering is formatted in dialog; Can use multiple schemes in a document (up to 6 diff.); Can pull numbering into Softwise from native Word Heading styles in a document; Shortcut keys are the same as native Word – Alt+Ctrl+1, Alt+Ctrl+2, etc.; Numbers on toolbar are lit if a scheme is active in document; Drop-down to switch between multiple numbering schemes in document – don't have to open dialog like MacPac; QuickFill drop-down displays recently used schemes <b>CONS</b> - No continuation styles feature; Does not support multiple #'s in a single paragraph like MacPac does	Native Word	Easy to use and leverages native Word numbering.
Numbering-Administration	Just needs to be installed; Payne can provide MSI for office installation via group policy		Global numbering schemes can be applied, although dialogue design is poor.	Admin tool allows for creating and edit firm schemes. Easy to use.
Numbering-Personal Settings	User can easily create their own numbering schemes, and share them with others	User can easily create numbering quickfills and share them with others	Pro-iEncore option is great. User can save private schemes.	MacPac Numbering has an option for users to create private schemes. We do not use this option at Vedder.
Numbering-Client Compatible	Because it uses Word's native numbering, the styles travel with the document, and any one with Word can use the same styles	Uses native Word numbering	All native Word.	All native Word.

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TOC-User Interface	<p>PROS - no manual marking needed; simply designate how many levels of headings wanted in the TOC; can choose options of where to put TOC; and how it can look, as it uses Word's native TOC creation.</p> <p>Can work well with clients' systems as it uses Word's native TOC creation</p>	<p><b>PROS</b> - No manual marking of run-in headings or hidden paragraph markers used; simply designate what portion of heading to include in TOC at each level; User can set different TOCs QuickFills for different types of documents; Uses native Word TOC, so no marking in document and remembering to turn off show/hide before generating, etc.; TOC easily updated; Can choose location of TOC when created and even have a cover page created automatically</p> <p><b>CONS</b> - Not applying TOC markers makes run-in headings incompatible w/ clients' systems-they may have to insert style separators if they want to update TOC.</p>	Native Word	TOC is generated as text instead of a field code. Easy to mark and format for those circumstances where not all instances of a level needs to be included in the TOC.
TOC-Personal Settings	In 2007 can create own TOC styles	Users can create QuickFills for the different types of TOCs that they do and share them; can also set up a default	<b>PRO</b> -has support for run-in headings, <b>CON</b> -uses native Word w/ no option to save personal TOC styles.	Options to generate a TOC are sticky. They stay until the user changes them.
Styles Support	PRO - uses native Word styles; style is updated with the paragraph and font edits.	<b>PRO</b> - Uses native Word styles; style is updated with paragraph and font edits made by example, so easy for "direct formatters" to grasp <b>CON</b> - no Cont. styles	Uses native Word & customize ribbon options (iHyperstyles) to direct users to styles.	Uses native Word styles.
Mobility of User Settings	Numbering schemes are saved locally in 2003; but in 2007 Enterprise version can save in database for easy access anywhere	Templates are loaded locally; Screen layout, QuickFills, everything is saved in SQL DB	Uses MDB file for database	Numbering is saved locally.
Contact Functionality	Template (Forms assistant) can pull from MAPI (IA, Outlook or GroupWise), and can these can be saved as well.	Can pull from IA, Outlook or GroupWise; if contacts are used in a QuickFill they are dynamically updated from IA/Exchange; not updated in documents	Supports Outlook/IA.	Contact integration supports integration with GroupWise, Outlook, Lotus Notes, InterAction, Prolaw
Client Matter Data		Linked to our C/M DB in Elite or DMS; Don't have to maintain a separate data store or import; C/M #s are verified	Supports multiple DMS	Can link to client/matter database

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DocID Management	not applicable in our office	Can be set very granularly to automatically insert, prompt to insert, etc. on Save, Save As, Print; can let users set defaults or lock it down	iDocID is a part of iOffice that allows for addition of the Doc ID	MacPac trailer inserts the Doc ID from document management system.
Offline Access		Everything is mobile via local DB which synchs with SQL DB; can be pulled down on demand or pushed via a batch file; local user's contacts are also replicated	Template data is stored on local machine & updated at login.	Templates, boilerplate and database stored locally so laptop users can work outside the office. Can also be access via Citrix or terminal server.
Word Symbols	not applicable in our office	Similar to Symbols option on BG toolbar	Unsure.	Symbol menu gives quick access to commonly used symbols as well as native Word symbols.
Bates Labeling	Payne has a separate Bates Labels module	Built-in utility for creating Bates labels	Allows user to pick row/column where bates label will be inserted.	Template designed to created bates labels. Allows users to set the starting number, number of labels, prefix and suffix, confidential phrases, starting row and starting column.
Redlining	n/a	N/A	NA	n/a
Metadata Removal	Excellent Metadata Assistant (separate from the Formrs or Numbering Assistant)	N/A	NA	n/a
AD Compatibility	yes	Coming in v. 6.0 - 2nd Qtr of 2008		
IA Compatibility	not applicable in our office	Can link to anything that will accept an ODBC connection		
SQL Compatibility	not applicable in our office	User/Admin data is stored in SQL; replicates to outside offices.	All database info is stored in MDB file and copied to each PC	In MacPac 10, database is stored on SQL server that users will sync to.
Support	Excellent support		Online client support.	Excellent support
Knowledge Base	Help section - well, very helpful - with pictures and clear instructions		Online knowledgebase clients can log into.	
Dialogue Design/Modification	not applicable in our office	GUI interface to VB coding; Similar to Word VBA look and feel for dialogs, but doesn't require VBA knowledge; Includes std. VB controls, custom controls and client/matter controls; Custom dialogs can have same look and feel as pre-loaded	Uses native VBA editor in Word	Uses VBA
Overall Ability to Customize	Both the Metadata Assistant and Forms Assistant are very customizable.	Should be able to customize in-house with some initial training/assistance from an integrator (Traveling Coaches or Savvy)	Extremely customizable with some training.	Very easy and highly customizable.

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Overall Ease of User Interface	Each assistant easy for user to understand and use.	Numbering/TOC piece not overly complicated-only made easier by QuickFills, which users LOVE!; template interface is familiar folder system with Favorites folder, which users LOVE!	Poor due to major customizations to standard Word toolbars & depth of dialogue boxes.	Easy for end user
Training Requirements	Can train Numbering in 30 minutes; same for Metadata Assistant; Have not yet done Forms assistant, but see same ease of training and use	Can train numbering and basic TOC use in an hour; Can train templates in less than an hour.	Pretty substantial training due to major customization to standard Word toolbars & due to depth of dialogue interfaces.	Very easy to train. Numbering takes a bit longer to train due to the fact that we have practice area specific schemes.
Installation Requirements	Simple install either by exe or MSI	SQL DB in each office; 30 MB client on user workstation, plus templates; special setup for laptops; MSI-compliant install; upgrades are very easy - customizations are not lost	MSI install. No need for a SQL server as MDB files are copied to the pc on sync. Less then 10Mb for the install, plus space for the templates. Need a share on a server for templates and ice file to be copied down from.	Easy to install via MSI right to local machine.
ADDITIONAL ITEMS				
Overview	PRO - overall, ease of use for each Assistant, ease of training, great support, and help instructions; no need for a third party to assist in installation or administration	PRO - Overall, good, easy to use product CON - have to engage a third party to do the initial setup and administrative training; SoftWise does not do the actual setup and installation.		
Utilities	not applicable in our office	Liked the Utilities options here; reminds me of Macros options in current MacPac. Wonder if we could use Utilities > Remove Hidden Paragraph Markers to remove non-Softwise hidden markers in other documents. Assistants have to manually remove now.		
icCalendar	not applicable in our office		Allows easy export of Outlook Calendar into a Word table.	
Document Analyzer	not available			
Recreate in New Document button	not applicable in our office			Reuse allows users to reuse their document to the template to ensure they have any necessary updates.

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QuickFills	Numbering Schemes are available; Forms Assistant uses Building Blocks in 2007, which are saved on server; easy to access	Virtually eliminates duping and revising - just use the QuickFill; Data saved to reuse for filling in dialog boxes; Can use a letter QuickFill in a memo template, etc.; similar bookmark names allow this; Can share private QuickFills with anyone attys., dept., floaters. Support for gender (Mr.-his) & plurality (Mr. & Mrs-they) & preferences where full name is displayed in 1 area but Mr. Jones in another and this was set in the template	iEncore handles the filling in of repetitive data	
Favorites	Very nice time saver because it makes the numbering of paragraphs WORK; ease to modify. Easy to find in one place	Nice time saver! User can easily select Favorites for Templates, Numbering, Pleadings, etc. Limits what attorneys have to dig through		Users love favorite templates and favorite authors.