

## MACRO PACKAGE SHOOT-OUT QUESTIONS

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PRODUCT	PAYNE (MARITTA)	SOFTWISE INNOVA (MICHELLE) XP/2003	ICREATE (DAMIAN) XP/2003	MACPAC (CINDY) W2K/2000
<b>SELECTION</b>				
1. How many years has your firm had this product?	Five years	Since 2003 – 7 years.	2+ Years	Migrating from WordPerfect to Word 2000. Wanted a template/macro package to assist in standardizing templates and numbering schemes. Also wanted the ability to be able to customize and maintain templates and numbering in-house.
2. Briefly describe your firm's selection process. (user panels, larger roll out[Office update, DMS roll out], side by side shoot outs)	<p>Recommendation by Trainer, who had previously used this product, and the Softwise produce.</p> <p>All we needed at the time (2004) was a Numbering tool, so went with Payne, instead of Innova;</p> <p>Numbering Assistant is in Word; we use Payne's Metadata Assistant in Outlook, Word, Excel and PowerPoint.</p> <p>Have now been looking at Payne's Forms Assistant for our 2007 rollout, especially for the Transactions (Real Estate) section because of the use of</p>	<p>Migrating from WordPerfect to Word XP and wanted a macro/template and numbering package that would integrate well with our DMS, as well as create standardized styled and numbered documents from the templates. Were impressed that it was SQL-based. Also considered Macpac, but chose Innova for this reason.</p>	<p>The selection process was one of necessity. We were already using another template and macro package that wasn't working for us and were in the process of rebranding the firm. The change in letterhead would force a change in all the templates. That combined with undesirable changes being made to the current template and macro package caused us to look for different direction. We needed a package that offered ease of use, both for the end-user and administratively. After visiting with several vendors at</p>	<p>(1) in-house customization and maintenance</p> <p>(2) standardization of templates and numbering styles</p> <p>(3) End User ease of use</p> <p>(4)</p> <p>(5)</p>

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	<p>Building blocks in Word to do Document Assembly.</p> <p>Like Payne's – uses Microsoft's program within the product (instead of going outside it).</p>		<p>ILTA and attending web based demos of two of the packages, we decided to evaluate iCreate. During the evaluation we were impressed with iCreate's ease of use and administration.</p>	
<p>3. What were the top 5 features/elements required by the firm?</p>	<p>(1) work within Word; (2) use Word's natural numbering schemes; (3) ease of use; (4) options to customize; (5) have opportunity to save own numbering schemes</p>	<ul style="list-style-type: none"> <li>• Standardize documents with Styles.</li> <li>• Friendly user interface</li> <li>• DMS Integration (c/m numbers, docID, etc.)</li> <li>• Ease of maintenance and ability to customize within IT department.</li> <li>• SQL platform.</li> </ul>	<p>In no specific order they would be: ease of administration, intuitive user interface, ease of template creation and modification, number suite built on Word's native numbering, integration with Outlook contacts, responsive technical support.</p>	
<b>ROLLOUT</b>				
<p>4. How did you deploy the product? What, if any, issues did you have? If you were not there during roll out, please ask co-workers or skip this question. --What was the context of your</p>	<p>It was put onto the new image when we upgraded from Office 97 to Office 2003; easy. If we wanted to, Payne would have provided us with an MSI to use to deploy. This is the same for each of</p>	<p>WordPerfect to Word Conversion - Users received new Windows XP image with Word and Innova. The firm chose to adopt Innova shortly after its initial release. It was first installed in the Austin</p>	<p>Our deployment was one where we actually removed the previous macro package and pushed the iCreate out.  Deployment of the product was easy. The backend setup</p>	<p>Users received new Windows 2000/Office 2000 image upon completion of training.</p>

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<p>deployment? Level of difficulty? --Front end deployment? --Back end deployment?</p>	<p>their products</p>	<p>office, and the rollout continued with the Houston office. At this very early stage, the firm encountered problems that were not unexpected. The good news, according to Ms. Vitale: "SoftWise did what they had to do to help me. At one point, that included direct phone calls during and after business hours to owner Bill Robertson, who really threw himself into the issue and helped me get it resolved as quickly as possible."</p>	<p>required us to have a shared folder where all the templates and the database file would be stored. As for the front end deployment, the vendor actually gave us the MSI scripts needed to deploy the products with a batch file. Using push technology the deployment of the whole firm took less than hour.</p>	
<p>5. What kind of training did you use for the roll out?</p>	<p>1) Lunch and Learn (intro meeting) 2) One – on – one coaching 3) on-going classes, Intro class on Styles, then the Numbering Assistant class</p> <p>Payne now also has excellent videos for training on each of the three products: Metadata Assistant, Forms Assistant, Numbering Assistant</p>	<p>Savvy Training conducted the training, which was included with Word rollout training. It was hands-on training.</p>	<p>Our in-house trainers attended Train the Trainer classes provided by Esquire. We then used a combination of training methods. Our staff were required to attend a classroom based session that lasted anywhere from one hour to an hour and a half, depending on skill level. For our document producing attorneys we did one-on-one training at their desk. Working around their schedule was a little difficult,</p>	<p>MacPac provided train-the-trainer sessions for our in-house trainers. MacPac training was part of our migration from Word Perfect to Word. Secretaries received 5 days of training for all applications in the rollout. We conducted 2 attorney classes (View/Print only, and Editing Documents).</p>

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			but we were able to get to all of them over the course of a couple weeks. All trainees were given a customized users guide and follow up floor support was provided. Today we have an in-house created web based video that can be used for specific topic training.	
6. If you use a document comparison package, have you experienced any issues with integration between the two?	Not applicable	At the time, we purchased Deltaview 2.9 and did not have any integration issues. We have since upgraded and have seen no problems.	No, but we use their document comparison tool, iRedline.	At the time of rollout, we were using CompareRite. We had no integration issues. Currently, we use Workshare 4.5. We have experienced a few issues with WS sensitivity that MacPac has been able to address.
7. What, if any, applications are integrated into your package? (Outlook, InterAction, CRM, FileSite, DM etc?)	Only Word for the Numbering Assistant; we use Payne's Metadata Assistant in Outlook, Word, Excel and PowerPoint Have been looking at Payne's Forms Assistant for our 2007 rollout, especially for the Transactions (Real Estate) section	Interwoven, GroupWise and InterAction	iCreate integrates with Outlook 2003 for Contact Management. The product has a component called QuickMerge that allows our users to search for addressees in multiple address books and then pulls that information in to the template. Another component of iCreate called iDocID, automates the insertion of a document file name in to the document footer	Docs Open 3.9.6, GroupWise, Workshare 4.5, DocXtools

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			and integrates fully with Desksite.	
8. End-user reaction				
a. What was the initial reaction to your product by the end-user (acceptance factor)?	Does this mean I HAVE to learn styles? (yes!); and then, OH WOW – this makes it SO much easier! I can go home at 5 instead of working overtime!!!	Users were overwhelmed with moving from WP to Word.	Our end users were extremely happy with the iCreate. Between ease of use, more intuitive dialog boxes and stability of the product (the fact that it didn't crash) our users were pleased.	
b. Was it easy to train? How much time was dedicated just for this product during your roll out?	Yes, easy to train, especially to those who used styles already. One to two hours (2 if people needed to learn styles first). The product is very user friendly, even more so in Word 2007, as the Ribbon lays it out with icons (people are very vision-oriented, and the ribbon helps in that respect a lot!)	Very easy to train. Innova was combined with Word training and we devoted 45 minutes for Innova.	iCreate ties very neatly in to native Word which made the learning curve and therefore the training for the end users and IT department relatively easy. The skill set of our end users also made training easier. For our training we used a combination of training methods. Our staff was required to attend a classroom based session that lasted anywhere from one hour to an hour and a half, depending on skill level. For our document producing attorneys we did one-on-one training at their	Very easy to train. Our users were used to templates from Word Perfect. Incorporating MacPac made the experience of using templates, much easier. To date, we have over 700 templates. Training for MacPac was about 3-4 hours.

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			desk. Working around their schedule was a little difficult, but we were able to get to all of them over the course of a couple weeks. All trainees were giving a customized users guide and follow up floor support was proved. Today we have in house created web based video that can be used for specific topic training.	
9. Standard macro templates				
a. What is the ease of customizing your templates?	We are evaluating this aspect of the Payne product for our next upgrade. In demos, no concerns were raised.	Very easy to customize without having to know VB. Some knowledge of VBA is helpful in setting form and dialog options.	Customizing firm templates is done in-house. We can easily make and distribute changes seamlessly to all users. If we need to make a change to the firm letterhead, or update some pleading formatting requirements, or add additional standard templates we can do all of this without calling the vendor.	Creating and updating templates is very easy. We do all of this in-house. We sometimes do need to call upon MacPac to create a macro be used within a template. Deployment of new and update templates is done through Zenworks.
b. Do you maintain these templates yourselves or do you pay to have it maintained?		Maintain templates within IT department. Savvy conducted administrative training for us, which included maintaining the templates.	While we do maintain all of our current templates, there have been a few templates that we have paid to have created or modified with special	Except for those instances where we need MacPac to create a custom macro, we maintain all of our templates.

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			features. Usually those require some added VBA coding.	
10. Numbering Suite	Payne's Numbering assistant			
<p>a. To what extent is the numbering suite utilized:</p> <ul style="list-style-type: none"> <li>• By Assistants?</li> <li>• By Timekeepers?</li> </ul>	<p>70% by Assistants</p> <p>At this point, 10% by Attorneys, as only about 20% of attorneys do their own Word work anyway.</p> <p>We're s-l-o-w-l-y introducing the benefit of Styles to Firm Culture</p>	<p>This is utilized extensively.</p>	<p>While everyone should be using the numbering suite, we have those users that think they know better. For Assistants I would say it's about a 60/40 split with sixty percent of the users using the numbering suite. The other forty percent are users that either thinks they can do numbering without it. As for Timekeepers, I would say that of the document producing timekeepers I would say that 15% actually use the numbering suite.</p>	<p>I think the 80/20 rules applies here. For assistants, 80 percent use numbering extensively while 20 do manual numbering.</p> <p>For attorneys, 20 use number numbering while 80 do manual numbering.</p>
<p>b. How easy is it to use?</p>	<p>Very easy to use</p>	<p>Very easy to use as well as to train. Simple dialogs.</p>	<p>Again, like the rest of the product numbering is incredibly easy to use. User can apply, create and modify a numbering scheme with a few clicks and using that scheme is as easy a keystroke or a click on the toolbar item.</p>	<p>Very easy to use.</p>

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11. Does your package include a document cleanup tool?	Not applicable	No.	Yes, iCreate provides some tools for replacing manually numbered paragraph with automatic numbers and applying the desired style.	No
12. How does your product work off-line?	Not applicable for our firm		All templates and database files are stored locally, so the product can be used offline. Many of our laptop users like that feature compared to the previous product.	All templates and database files are stored locally so the user has full access to MacPac in or out of the office.
13. What are the end-user customization capabilities? Are your users actually doing this? <ul style="list-style-type: none"> <li>• By Assistants?</li> <li>• By Timekeepers?</li> </ul>	Users can create their own numbering schemes from one used from the Payne's Numbering Assistant, and use it over and over. And YES they are using it (see answer to #10.a.)	End users may set up "QuickFills" to auto-fill forms, personal numbering schemes, and TOC schemes. Many of these are shareable. They LOVE QuickFills. IT loves QuickFills, because it means they are more likely to use a QuickFill than to "dupe and revise" their documents.	They can create custom toolbars, shortcut keys and AutoText, of course. They can create their own personal forms, but anything requiring automation is done through the IT Dept.  Unfortunately most of our users don't take advantage of these features.	Our users need to go through the MacPac administrator for the firm for customizations to templates and/or numbering.
<b>ONGOING SUPPORT AND WISH LIST</b>				
14. What is the current view of your product by the end-user (versus the initial rollout)	We are keeping it when we upgrade to Office 2007; upgrading to the Numbering Assistant 2007 version; same	Much more accepting. They really like the speed with which they can generate shell	We have the same acceptance as we did in the being. Our users are still very happy with	Our users seem to have the same acceptance as they did when they came out of

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reaction)?	for the Payne Metadata Assistant.	documents.	the product.	training.
15. Do you do teach continuing classes, and if so what topics are most attended/most needed?	Yes – Styles 101, 102, and Numbering Assistant.	Yes, Sequentia numbering classes were the most attended and most needed for follow up.	We are continuing to teach classes on the product as we have new employees join the firm, users requesting additional training or if we see deficiencies in a user's skill set. We have offered non-mandatory training, but more often than not the attendance is non-existent. The topics that are most trained on are Numbering, TOC and iHyperstyles.	
16. If you would poll your end-users, what do you feel their three favorite features would be?	Ease of use It works! Can save own customizations Makes TOC creation MUCH easier	QuickFills, Sequentia Numbering, TOC	The iEncore feature to save repeated info., QuickMerge - Outlook Contact Connectivity, and the Numbering Suite.	Numbering, Contact Integration
17. Everyone has a wish list.				
a. What do you wish your product would do that it doesn't?	Edit TOC (which the '07 upgrade does, so our wish was granted)		Easier editing of template dialog boxes and the backend VBA code.	
b. Are there features you wished worked more smoothly/differently? What	No – it works fine	Would have grouped templates by Practice group.	Easier way to make iHyperstyle schemes and	Easier way of change from one template to another, e.,g.

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are they and please describe.			Numbering schemes global.	turn a memo into a letter.
c. What do you wish your product did better?	Nothing.....		Better refresh utility. Currently the user either has to logout and login or manually run the iCreate Refresh Utility to get any admin changes made to templates or the database. We would schedule the automatic running of the utility; however, Word and Outlook, if Word is the email editor, has to be closed before you can run the utility.	
18. How satisfied are you with the template/macro package choice your firm made?	Very satisfied with Payne's Numbering Assistant, and Payne's Metadata Assistant, which is why we are looking at their Forms Assistant also	Very satisfied.	It's easy to use. It works. I'm happy.	Very satisfied.