LawToolBox365 Office for Legal

Automating deadlines, document folders, calendars, notes and shared inbox for Outlook, Teams ... and soon Dynamics365

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LawToolBox is a provider of out-of-the-box deadline rulesets and docketing management tools that empower legal professionals to easily and methodically manage litigation and compliance deadlines with confidence. Microsoft is the leading provider for business productivity tools that also enables third-party providers like LawToolBox to deliver their products to end-users in the most secure and seamless experience that has ever existed.

When you combine the suite of modern LawToolBox apps for legal with Microsoft Office365 the whole greatly exceeds the sum of the parts. LawToolBox is better because it can deliver its legal products to market using Microsoft's security-hardened platform, while also amplifying the value it delivers by leveraging Office365 Groups to provision matter calendar, files, notes and a shared Inbox. And Office365 is better because its suite of powerful but general tools are customized, and have more value, for legal professionals.

LEGAL CALENDARING AND DOCKETING

Missed Deadlines are the Number ONE Risk Attorneys Must Manage. Deadlines can be complex. Its critical to get them right. Manually entering deadlines is risky. Missed deadlines are the number one cause of attorney malpractice and account for almost 40% of all malpractice claims against attorneys. In the past, law firms manually calculated deadlines by hand and then typed these deadlines into calendars on-at-a-time. When you consider that legal professionals must manage thousands of deadlines, this approach is extremely susceptible to human-error. The business of law requires the modern legal practices address and manage this risk.

The Old Way of Manually Managing Deadlines is Inefficient. In addition to the risk of missing a deadline, law firms are needlessly spending countless hours and money just to get basic tasks done, preventing them from better serving clients and putting undue risk on the firm that impacts customer service, brand reputation, short-term revenues and long-term existence. Further complicating their ability to address this problem, many attorneys are so overwhelmed by inefficiencies in their practice that they don't feel they have the time to take steps to fix the issues weighing them down. But this failure to properly manage deadlines can lead to missing deadlines, losing motions, losing litigation, and losing clients. The business and personal consequences can be huge.

LawToolBox Automates and Streamlines Deadline Management. With LawToolBox, legal professionals can reduce the malpractice risk of a missed deadline by automating the calculation of deadlines using their proprietary docketing rule-sets based on state and federal rules of civil procedure in 50 states, and in other compliance-driven practices like trademark and patents. For example, enter a "trial date" in the Los Angeles Superior court tool and calculate over 70 deadlines that run off that date in seconds instead of hours. The auto-calculation of deadline is enhanced with robust features that include:

- Adding deadlines to the right calendars at that right time
- Linking to deadline authorities empowers attorneys
- Instantly updating calendars when deadlines change

- Watching for and incorporating court rule changes
- Tracking the history of who edited what deadline and when

This efficiency helps the modern lawyer to be more successful because by automating the procedural aspects of litigation, they can spend more time on the substantive issues that will determine whether they win or lose their case. In many instances, law firms can save more in malpractice insurance discounts than they pay for LawToolBox while also saving an average of 4.5 hours per case managing deadlines.

LawToolBox has been designed to handle changes in deadlines, matter access, and team members. When you receive an email from opposing counsel, or a notice from the court, that an important event like the trial date has changed, attorneys can instantly recalculate deadlines inside LawToolBox.

Importantly, LawToolBox is also another set of eyes watching for court rule changes. When the rules of procedure used to calculate deadlines change, LawToolBox365 notifies you and updates your calendar.

Customization. Their ability to provide custom rulesets is unique. While LawToolBox has rule-sets for civil litigation in 50 states out of the box, users who have unique timeline needs can build custom calculators that appear only in their Inbox. For example, a large national insurance company can use rule-sets built to their unique needs and practice, or an attorney managing compliance deadlines for mutual fund companies can use their own calculator that reflects not only statutory deadlines, but internal deadlines intended to make sure filings are ready to file way in advance of the actual deadline.

LawToolBox is a Modern Add-in for Office 365. LawToolBox is leading the way and showing the legal industry and other verticals how to integrate products into the Microsoft ecosystem. As a modern add-in, it only takes a few clicks to add LawToolBox to Outlook or Teams, so a firm or legal department can be up and running with LawToolBox Office of
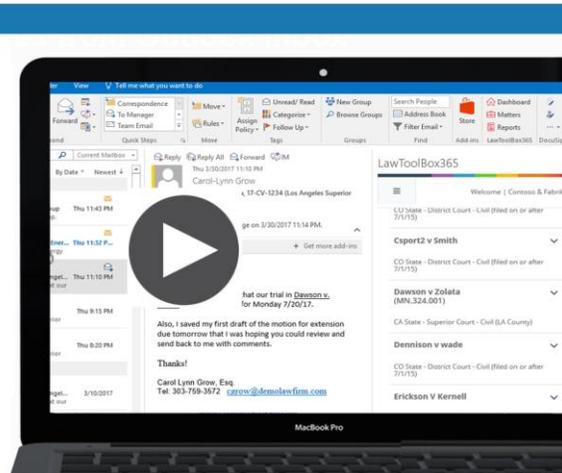
Legal in a few minutes.

LawToolBox Office for Legal. LawToolBox is not just a product that surfaces a new cool feature in Office 365, instead it is a comprehensive LOB application that creates a bridge between Outlook and Teams, with a dashboard into many of the powerful features of Office 365 that legal professionals frequently don't know exist or how to use.

Legal professionals can set up new matters right from inside Outlook or Teams, share the matter to specific team members, and then add deadlines to calendars. LawToolBox uses the Outlook personal and matter calendar as a bridge to share information with other legal solutions.

There are many features and tools that users can access regardless of whether their entry-point to LawToolBox is Outlook, Microsoft Teams, or – coming soon – Dynamics365:
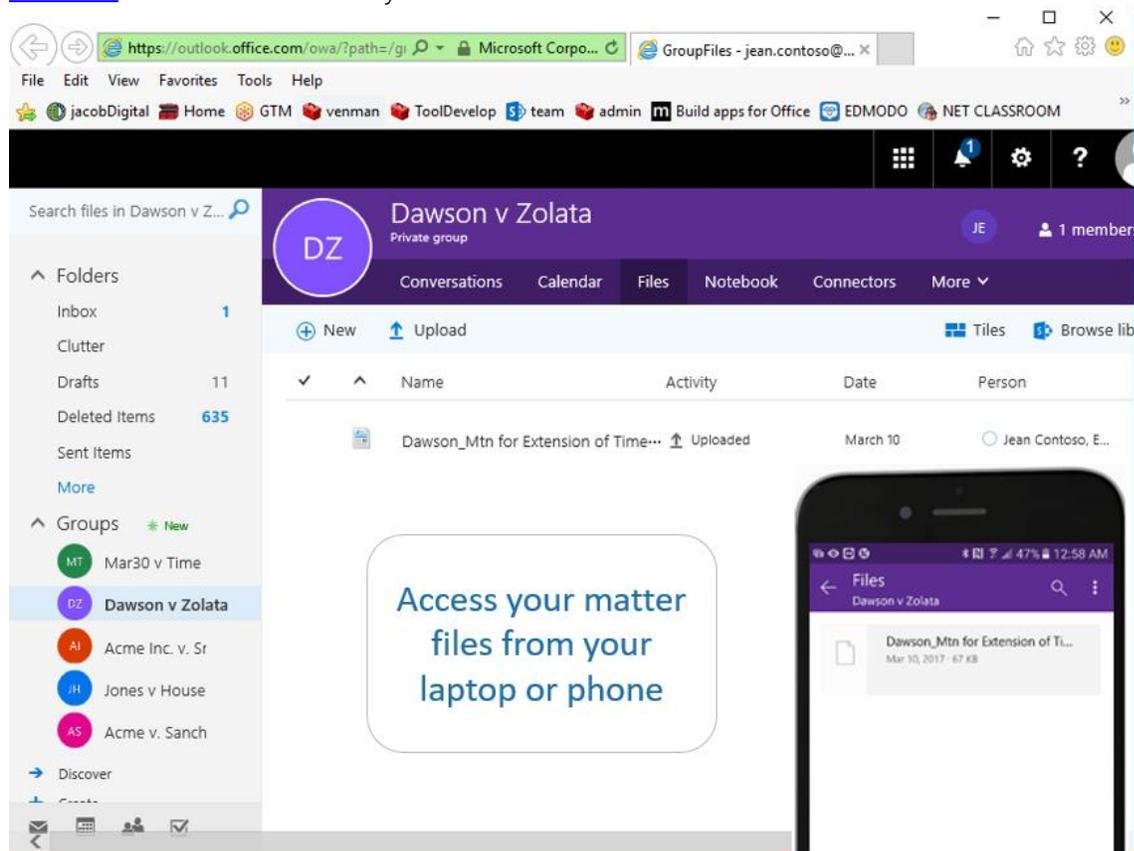
• Create matters or cases using rule-set
• Calculate deadlines based on applicable rules
• Add, update, or remove case-specific deadlines
• Update team member Outlook calendars as deadlines and users change
• View, email and share deadlines for a matter, user, team, or firm-wide
• Filter by recent matters, matter name, users, practice group, or firm
• Instantly save emails with attachments to matter in SharePoint
• Create a document folder, OneNote, shared Inbox, calendar
• View analytics and insights on co-worker's case activity
• Search for keywords and phrases across Office 365

LawToolBox is constantly adding to these capabilities as it strives to help good attorneys become great attorneys, and to deliver next-generation deadline management tools for law firms and corporate legal departments.

DOCUMENT MANAGEMENT AND MATTER MANAGEMENT

LawToolBox Leverages Microsoft Groups for Matters. Using the Microsoft Group backbone, when a new matter is set up in LawToolBox, an Office365 Group is also auto provisioned that creates for each matter a document folder, calendar, notebook, and shared Inbox.

LawToolBox leverages products and tools from the Microsoft ecosystem like SSO and Graph API to enhance and amplify product features, security, and collaboration. For its integration of MS Groups into our product, LawToolBox was awarded "Best SharePoint Solution" in Hack Productivity 4 in 2018.

This integration allows law firms and legal departments to leverage powerful features in Office365 that they are already paying for but not using.

Document Management though "Team's" or "Office 365 Groups"
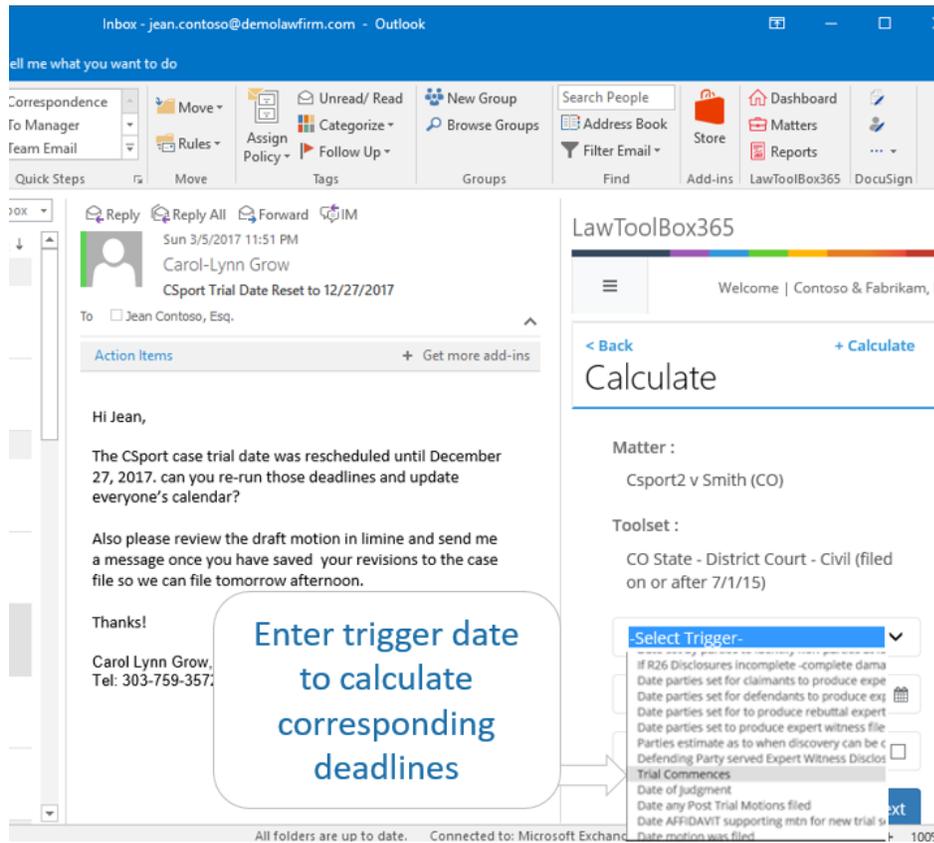Both Powered SharePoint

The document management capabilities Teams and Office 365 Groups via SharePoint Online are well established, and LawToolBox merely amplifies and leverages these existing capabilities. Further, your Microsoft Partners are experts on Office 365 and Sharepoin readily able to support these products at a moment's notice. This an important consideration because if you rely Microsoft, the Office 365 solution that will meet your needs not just for 3 or 4 years, but for the foreseeable future. For example, Office 365 is a powerful out-of-the box legal document management system that can tailor the taxonomy and document structure to classify legal documents to facilitate and empower search functions. But beyond using data structure to facilitate search, Office 365 supports full-text search of documents, searching by original owner, document title, last modified date, keywords, within designated folders, all while limiting results based on user-based permissions. Microsoft platform also leverages document version control, and evolving data governance tools that allow administrators to create document access and retention policies.
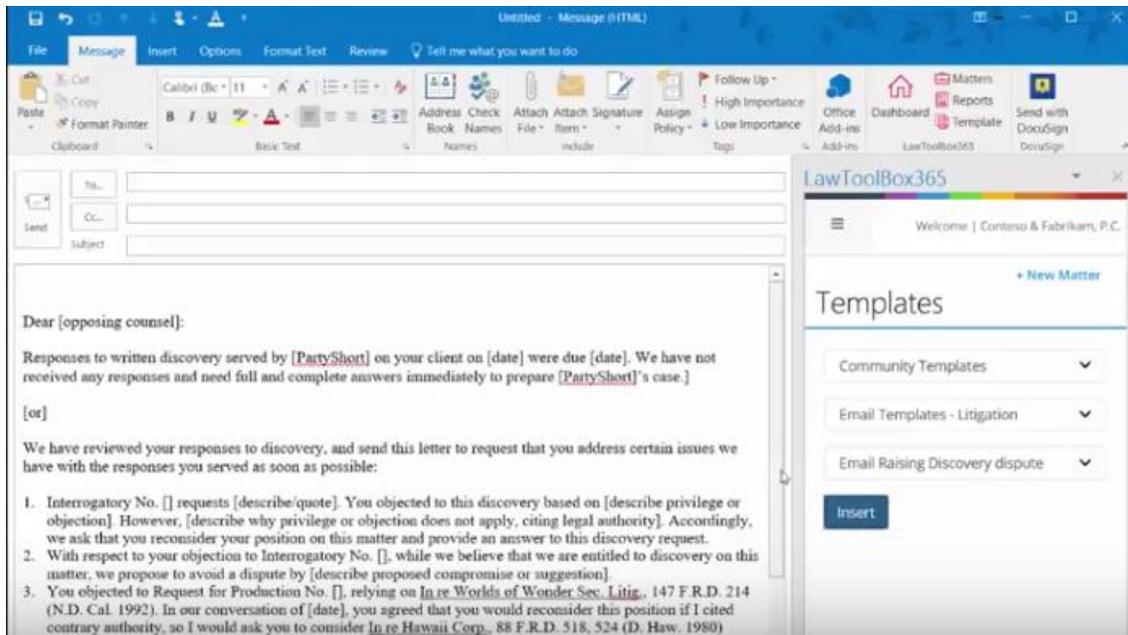
System Access and Security

As a modern app, LawToolBox can be used on any system that supports Office 365, including apple products like MAC. Authentication by SSO OpenID is supported. The history of every deadline is recorded in logs that cannot be edited and permits users to instantly retrieve information on who edited what deadline and when. LawToolBox uses SHA2 SSL/TLS/IPv6. LawToolBox has been built around Office 365 productivity software, uses the Microsoft Graph API, and has received numerous awards from Microsoft recognizing our solution as a market leader. To the extent that Office 365 is compliant with 3.6 SAML and FICAM, LawToolBox honors that requirement. Because LawToolBox uses OpenID SSO authentication to Office365, LawToolBox complies with the MFA requirements of 3.8 and cryptographic requirements of 3.10 and 3.11. Scheduled maintenance is on the third Thursday of every month from midnight to 3 am E.   Disabling a user's Office account disables their LawToolBox account, or a LawToolBox account can be disabled in our admin portal.

LawToolBox Add-in for Outlook. From an easy-to-use and intuitive interface, users can set up a LawToolBox matter or case from Microsoft Outlook, where many users spend most of their work day. In addition to calculating and sharing deadlines, LawToolBox has also added some powerful new features contextual to Outlook, including: (1) when a user receives an email notification on one of their federal matters from PACER, the Add-in will read basic matter information from the email and streamline the calculation of new deadlines; and (2) as a user is writing an email they can pull up deadlines from any matter in LawToolBox and insert them into the email they're composing.

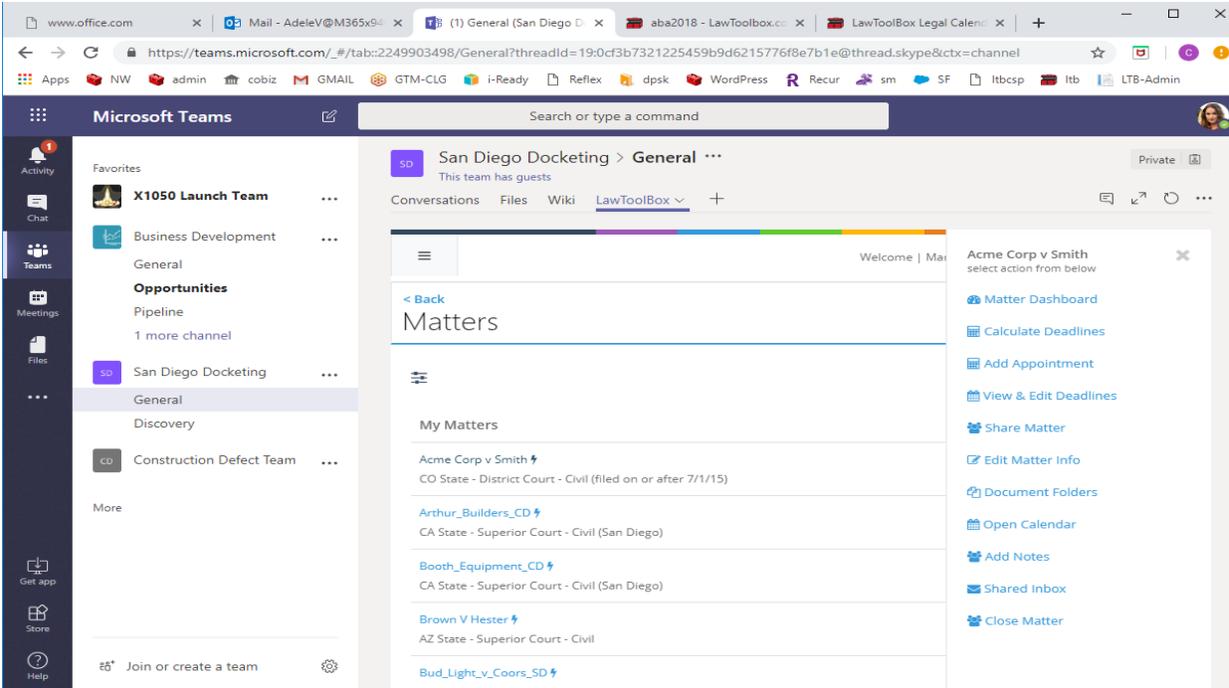The LawToolBox Add-in for Outlook was awarded "[3d Place Most Business Value](#)" in 2016.

LawToolBox brings email management in Outlook and rules-based calendaring together. When users are composing an email, legal professionals can insert relevant matter deadlines in seconds with the click of a button.
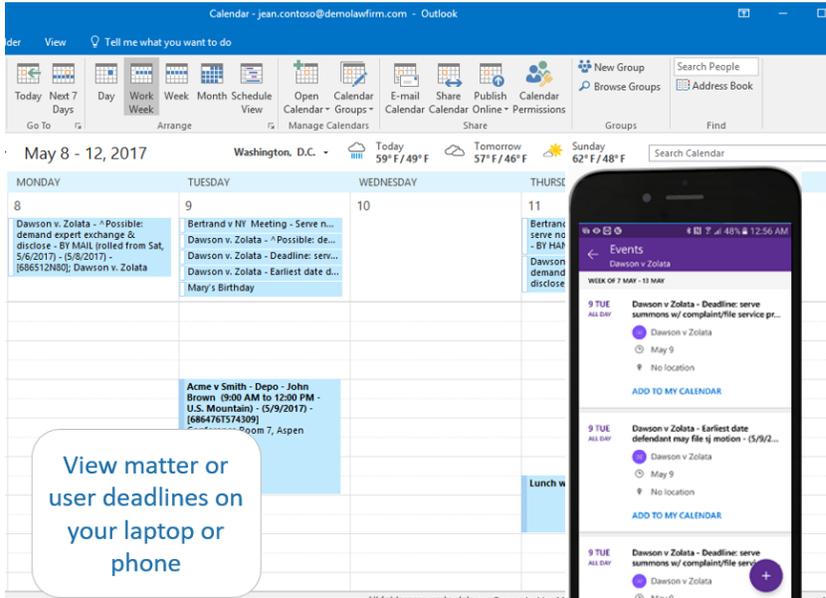
LawToolBox Bot and App for Teams. The LawToolBox integration for Microsoft Teams transforms a powerful collaboration product into a vertical solution specific the needs of legal professionals. The intuitive combination of a BOT and TAB provides easy and powerful access to upcoming deadlines across all matters the user is working on. Our enterprise-ready app uses Microsoft Graph API to leverage the native extensibility of the Microsoft Teams platform to surface a powerful tool for litigators, law firms, and corporate legal departments to create matters, view reports, calculate deadlines, and sync with Outlook. LawToolBox was awarded "second place in the Best Office Integration" category for its Deadline App for Microsoft Teams in 2018.

Collaboration. In a constantly changing complex legal environment, managing and sharing deadlines and matter info has never been easier. When you combine LTB with Microsoft Outlook and Teams, you convert a robust and powerful collaboration tool for business into a platform for legal, which deepens the and broadens the value of Office 365 for attorneys.
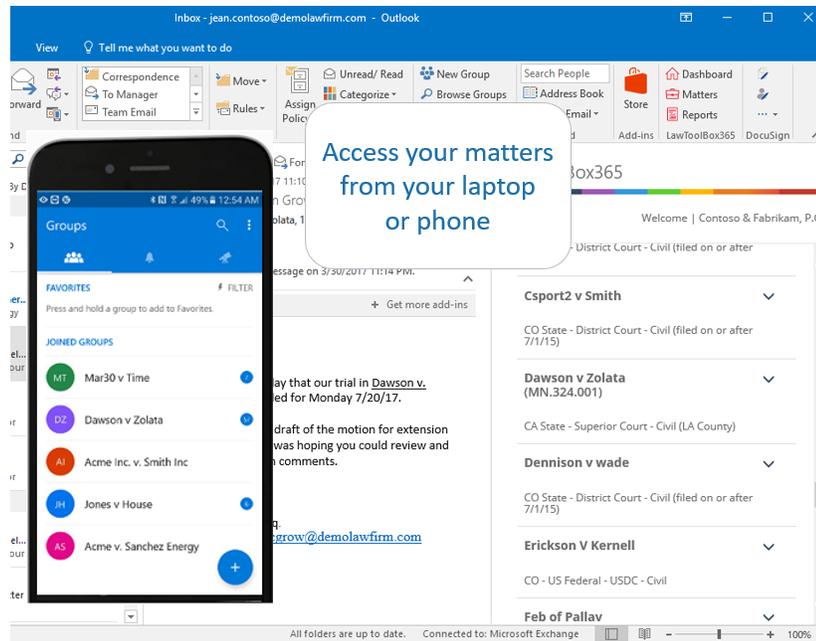
Extensibility - Office365 is a Bridge for LawToolBox to Interact with Third-Party Products.

When LawToolBox adds events to the Outlook calendar, these deadlines will also appear on any case management software the 2-way syncs with Outlook.

Portability. Legal professionals need access to their deadlines, anywhere, anytime. The modern lawyer is mobile and needs to be able to access matter information anywhere, anytime.

The modern lawyer is mobile and needs to be able to access matter information anywhere, anytime. Because LawToolBox piggy-backs on the portability of Office 365, legal professionals can view deadlines and matter information from wherever they are using Microsoft Office for iPhone, iOS or Android.

Security. Security is especially important to legal professionals who constantly draft and review confidential work-product and attorney-client privileged information. The LawToolBox solution leverages the security features built into Office 365 by using SSO to authenticate users, and then using Graph API to enforce permission and role-based access. Further, because LawToolBox takes security and privacy very seriously, we are a signature to the Cybersecurity Tech Accord.

Better Together! In a constantly changing complex legal environment, sharing deadlines, collaborating, and managing matter information has never been easier. For the busy attorney, LawToolBox and Microsoft Office 365 are better together …