When Sarah Vandegrift first started using an extranet last year, she was uncertain about its impact. But the Wyatt, Tarrant & Combs paralegal based in Lexington, Ky., now is a believer. "I am amazed at how helpful it is," she said.

With the proliferation of e-mail and the digitization of documents and other printed material, many firms and legal organizations are looking for an alternative to the digital dance required to transfer materials from one place to another. That alternative for firms of all sizes is the use of an extranet. Many paralegals are finding this technology useful in their daily work lives.

In addition to document management, an extranet offers online case management and electronic billing tools, which are especially useful in complex litigation. "The corralling of all documents, correspondence, calendaring, billing and budgeting in one location is ideal," noted Suzi Elmore, a paralegal with Oak Brook, Ill.-based Federal Signal Corp., which uses CaseKnowledge, a legal-specific extranet solution.

What Is It?

Simply put, an extranet is an online repository that can be enhanced with database features, calendars and a host of other services. It's generally accessed via the Web, and the site's home page contains a list of the matters for which a particular user has access. Each matter folder typically contains background information about the case or transaction and offers additional details in subfolders that contain actual documents.

"Our extranet functions as both a storage house for the thousands of documents related to the litigation as well as an area where current developments, deadlines and project information can be accessed," said Jeff Shablate, a legal assistant at Atlanta-based King & Spalding. His firm has been using AMS-Legal's Collaborator since the beginning of 2005.

An extranet also can be secured and generally contains a tracking feature so the entire legal team can identify who has reviewed which documents and when. At Vedder Price in Chicago, senior paralegal Therese Callahan has used the Collaborator extranet (which the firm refers to as ClientConnect) for six months to create "rooms" for closing corporate transactions. Participants can maneuver through the virtual closing room by clicking on links found in the closing memorandum and find key documents posted in either Microsoft Word or PDF format. "The document is uploaded once and serves everyone when they want it as often as they want it," Callahan said.

The technology also enables international clients in various time zones to access their files in a very effective and cost-efficient manner. "Clients don't lose a day asking us to send them documents or posing questions about whether we have received materials," Callahan added. "They can see for themselves right away."

To eliminate e-mail traffic with large attachments, Vedder Price and other firms use extranets as
Collaboration

In the legal environment, time constraints often make it difficult to establish personal relationships among clients, attorneys and staff members, according to paralegal Bill Yunker of Minneapolis-based Moss & Barnett. After two years, the firm's extranet, Collaborator, has removed that difficulty.

"Since the extranet is such a useful and time-saving tool, it has helped to cultivate great professional and interpersonal relationships among the members of our firm and with the clients whom we serve," he said.

While the increased popularity of extranets has enhanced collaboration, it also has reduced face time. When Callahan prepares closings on aircraft transactions with the Export-Import Bank of the United States, a client in Washington, D.C., she travels from Chicago to establish the document closing room. Prior to Vedder Price's implementation of Client-Connect, all of the transaction parties traveled to Washington to finalize the documents and close the deal. "Now, with all of the documents posted on the secure Web site, the parties are able to remain at their desks and confirm that the documents have been executed and received prior to closing," she said.

Thanks to extranets, Vandegrift said travel has been reduced, while efficiency and client satisfaction have increased. "Our clients and co-counsel have been very impressed with the availability of this service, and it makes communication via the Internet much easier with everything in one place," said Vandegrift, whose firm uses Microsoft SharePoint Portal for its extranet. "The best part is that there is no charge to our clients for this service, and it requires the use of a password for each user, making it safe and secure."

An extranet allows relationships between law firm teams and clients to be much more fluid and intimate, noted Dwight Moody, director of paralegal services at Heller Ehrman in New York City. In March of 2000, the firm created its own extranet called Heller Ehrman Advantage using Microsoft SharePoint Portal as its backbone. "In the highly competitive global legal market, we see this as a competitive advantage," Moody said.

The Benefits

Legal professionals have found extranets come with many benefits.

**Paperwork reduction.** Shahlae reported that after 18 months, there is a noticeable reduction in the time spent retrieving and organizing documents attorneys request for review. "The extranet allows me and other staff members to concentrate on more important tasks," he said. "Another added bonus is that it's a lot harder to lose documents."

**Accessibility.** Traditional legal services typically involve the shuffling of massive amounts of paper from location to location. Documents are assigned various levels of access (e.g., privileged, responsive and nonresponsive). Lawyers and paralegals often have to travel, sometimes across the globe, to access the documents. With the proliferation of online repositories, the paradigm has changed. "It has served as a way to disseminate information, keeping everyone in the loop, as well as giving you access to materials all over the world without the hassle of lugging around boxes full of paper," Shahlae said.

**Contact.** With the enhanced accessibility, paralegals, lawyers and clients remain informed of the most current developments and deadlines. Because various extranet tools integrate with corporate platforms, there is often a seamless transfer of information. "It makes communication via the Internet much easier with everything in one place," Vandegrift said.

**Efficiency.** Prior to implementation of her firm's extranet, Callahan would receive requests for documents to be e-mailed or faxed from members of the project's working group at various times of the day and night. She would have to stop working on the task at hand to arrange to have the materials scanned and e-mailed or faxed. Now, the documents are scanned as they arrive in the office, and they are posted online by the end of the day, giving all the parties involved in the transaction access to the documents whenever they need them. "It's a much more efficient process, she said.

**Document modification.** Instead of e-mailing documents and pleadings back and forth with suggested changes, Wyatt, Tarrant's clients and co-counsel have full access to documents on the extranet and make their changes directly to the document using a real-time feature. They also can access photos and Microsoft PowerPoint presentations for reference during the editing process.

"This saves me time and our client money when we are not frequently having to mail copies of documents to everyone, especially when scanning and e-mailing might not be an option due to the size of the documents," Vandegrift said.

**Calendar.** When Vandegrift is working with clients who have a question about when a hearing or deposition is scheduled, they simply can access the pre-set calendar at their convenience. "My favorite feature is being able to share the calendar of events and task lists,
especially when co-counsel is involved and we split up tasks," she said.

Online discussions. Some extranets contain a discussion board that permits threaded conversations. This has great advantages over an e-mail chain because it doesn't require the same type of search frustration associated with locating different versions of a message. In addition, all of the data remains accessible as long as the extranet is available. "The discussion board, which is basically a chat room, is much better than many long strings of e-mail back and forth," Vandegrift added.

Document management. Certain extranets, such as Heller Ehrman Advantage, offer integration with a firm's records management system. The integration allows users to upload documents into the system and code them with all relevant information, Moody said. "This allows documents to be published to the extranet with the relevant coded data and results in much greater efficiency for our clients," he added.

Independence. Paralegals often are the site administrators for the extranet users on transactions or cases they monitor. Once trained, they easily can create new sites, apply security protocols and establish additional accounts. "This puts the power of the tool directly in the hands of the people who are using it the most," Moody said.

It's benefits such as collaboration, document management and accessibility that are making the extranet one of the most popular legal tech tools today. In addition, the satisfaction of providing excellent client service can't be overstated. "The extranet allows me the opportunity to better serve our clients," Ymer said.

Another significant result of the extranet revolution at firms is the rise of paralegals as keys to communication between clients and attorneys. Gone are the days when paralegals were relegated to filing, scanning, e-mailing, photocopying and retrieving documents. Now, with the use of extranets, more time is spent uploading information to the site and modifying the calendar and task lists.

As part of the in-house counsel team at Federal Signal Corp., Elmore often is involved in analyzing outside counsel's fees and expenses. "CaseKnowledge offers an explicit breakdown of tasks that not only helps us to see where the money is going, but also should be helpful to the law firm for accurate planning in future cases assigned," she said. "Everyone turns to me for assistance, and I like that aspect of my work." In fact, Elmore noted, "I have become the 'go-to' girl for understanding and using CaseKnowledge."

The benefits notwithstanding, it can be challenging to foster total participation using the extranet in a firm. While many lawyers today are functionally computer literate and use some type of mobile device, such as a personal digital assistant or cell phone, encouraging lawyers to spend nonbillable time learning extranet technology can be difficult, Elmore noted.

However, at Heller Ehrman, that doesn't seem to be a problem. "What I am seeing is the way that it has taken off like wildfire around the firm," Moody said. "Every attorney and paralegal who sees Heller Ehrman Advantage in action immediately is interested in using it for all of their current matters as soon as possible." Moody credits the smooth customization, functionality and centralized data access for the excitement.

Extranet Service Providers

There are a number of well-known extranet systems, but products such as Collaborator and CaseKnowledge reflect the most popular and comprehensive features available. While costs vary, pricing can be on a monthly subscription basis or can be an annual flat fee, with possible setup costs or implementation fees depending on the vendor. The total amounts are based on case volume, priced in tiers, but would allow for a virtually unlimited number of users. Here are some popular extranet providers.

AMS-Legal

Portland, Ore.-based AMS-Legal created its Collaborator extranet software in 1997 and currently serves law firms such as Day, Berry & Howard, Moses & Singer, Chadbourne and Parke and Mayer, Brown & Maw. It's a Web-based, outsourced turnkey solution that is fully customizable (with logo and brand identity) and is application service provider hosted.

Collaborator integrates with leading document management systems, which includes synchronization and replication, as well as calendar and task manager functions. The system actually recognizes updates in a given document following changes, which eliminates unnecessary monitoring of different versions. It also offers threaded discussions and automated alerts to all users know by e-mail that the system has been updated. It offers instant creation of new extranets and has granular security functions, permitting the firm to specify access rights at the item level within each extranet.

www.casenow.com
CaseKnowledge

www.casenowledge.com

In addition to many of the traditional features extranet providers offer, Chicago-based CaseKnowledge Inc. also functions as a case management system with captioned reporting templates. It has factual chronology, exhibit management, party Rolodex and litigation plan wizards. The system can process liability and damages analyses as it tracks demands, offers and requests for settlement authority. It also has e-billing and advanced search capabilities.

Elmore said she enjoys using this program. "Federal Signal has more than 20 matters on CaseKnowledge and will add new litigated matters as we are served," she said.

Leverent Consulting

http://office.microsoft.com/sharepoint

Lisle, Ill.-based Leverent Consulting offers netAgility Legal Solution, which is built on Microsoft Office SharePoint Portal Server 2003. It offers forms and document management, workflow management, online collaboration and more. Its product integrates with document management systems such as Intervenous WorkSite, Thomson Elite, PCDOcs, Hummingbird DM5 and LexisNexis InterAction.

Internal Design & Hosting

In addition to vendors, law firms such as Heller Ehrman design and manage their extranets internally. Heller Ehrman Advantage (http://优势.heller.ehrman.com) was developed using Microsoft SharePoint as the foundation, but the firm hosts its secure site internally without assistance from a third-party provider. The extranet is fully integrated with the firm's core systems, so key information is rendered automatically on the extranet, or is more easily published from document management or records management systems, according to Robert Meadows, Heller Ehrman's chief information officer. "This results in richer content that is more valuable to our matter teams and the clients they support," he said. Heller Ehrman Advantage also permits paralegals to easily adjust extranet components to allow for the distinctions between sites that support transactional matters and those that are designed for complex litigation.

Getting Started

While not all firms have bought into the benefits of extranets, Vandegrift only has good things to say. "[The extranet] will support any kind of case or project," she said. "I have used it for administrative cases as well as litigation, but I can't imagine what its limitations would be."

Yunker agreed. "Because the extranet is an electronic database, the types of projects and cases that it can support are about as vast as the human imagination," he said.

Once your firm or legal department has purchased a service such as Collaborator, creating an extranet is simple — just access the system and spend a few minutes setting it up. Many of these systems are designed to allow non-technical users to set up extranets on the fly. "The paralegal who admin-
isters a client extranet site easily can tailor or modify a site to ensure it has all the components that are relevant for that matter," Meadows said. It's similar to having a shopping basket full of options, allowing paralegals to "buy" only what they want or need, he added.

If your firm has not selected a provider, begin the process by visiting vendor Web sites and viewing online demos of products. If your firm wants to create its own system to manage in-house, take a tip from Heller Ehrman. According to Meadows, the implementation of Heller Ehrman's extranet started with focus groups that polled attorneys and paralegals to help create the overall architecture. This is an important step because a startup client with transactional matters, for example, might have different needs than a large corporate client with litigation concerns. "These focus groups helped us define our requirements so that our extranet would be of substantial value to all of our clients," Meadows said.

Once the parameters are defined, select a product that is easy to set up, requires little training, is user-friendly and is capable of being populated with valuable content at a very low cost. With the interdependence of technical systems, consider systems that integrate core client relationship management, document management and accounting programs, as well as offer indus-

standard security or better.

Once the extranet has been created, it needs to be tested, and then tested again. "We used test environments to put all elements of our extranet program through its paces: the technology itself, training and quick reference materials for our paralegals, and system performance," Meadows added.

Extranets are revolutionizing legal organizations, and more and more paralegal and legal experts are joining in with great success.