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Technology Track – Session 1

Digitizing Your Office: Utilizing Sharepoint and Digital Files

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About the Presenter...

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Introduction

Today, most business communication occurs digitally, and most information is stored in digital format. Lawyers are no exception. We use tools like Microsoft Outlook and text messages to communicate and other tools like Microsoft Word documents and PDF (Portable Document Format) files to create and save information. It is true that some information comes to us in paper form, but most of us process that information into electronic form via scanning.

If document retention were only about retention, this would be a short paper. Retention is only the beginning. While retaining files for as long as needed in an organized manner is critical, when most lawyers hear document “retention” they are thinking “how long do I need to keep something and how do I destroy it once I have met my obligation?” In other words, their primary focus is too often on destruction rather than retention. As we will see destruction is much more difficult without proper retention and organization.

How we store this digital information and how long we must keep it is the subject of this paper and its accompanying presentation.

Document Management

Personally, I have always defined document management as:

“A logical and consistent way of saving documents, so that we can find them later when we need them.”

Every lawyer uses some form of document management. Whether the system is a series of windows folders and subfolders, a feature of a practice management system or a stand-alone document management tool, we all use something and we always have. File cabinets, accordion folders and manila folders were a form of document management. Unfortunately, there are several issues that affect many document management systems. First, one person’s logic is not always another person’s logic. This means folder and naming conventions do not always work. Second, maintaining consistency is hard enough for one person, let alone a team of people. This means some people use the document management system in different ways or use a different system altogether. These issues often make it difficult to accomplish the real goal of document management – the ability to find documents when needed.

The ability to “find” documents when needed is critical. Too many lawyers waste too much time looking for documents. For example, they know they created a document several years ago that discussed a specific issue. They know the document would help them now with a similar issue if they could only find it.

Finding documents is also critical when it comes to document retention. Document destruction rules are typically based on a combination of content and time. If you cannot find documents that meet the criteria for destruction, how can you destroy/delete them? For this reason, no document retention or destruction policy will succeed without an underlying document management system that is also successful.

Document Management, Retention and Destruction

Document management impacts document retention and destruction in several ways. Once again, consider that document retention rules are based on content and time. Almost any good document management system organizes documents by client and matter, providing the content component. The time component is either tracked automatically or, in some cases, manually with profiled date fields.

If your document management system is do-it-yourself, directory based, you will need another tool to help you with document retention and destruction. These types of systems include everything from Windows folders to OneDrive storage to any other system where you set up folders and subfolders as you go. Windows files and folders are date stamped with the date they were created and the date they were last modified. However, the search mechanisms that allow you to search files by those criteria leave a lot to be desired. If you use such a system, you need an independent list of matters where you track the date the matter closed and the date the files can be destroyed. This can be as simple as a spreadsheet or tracked in your practice management system. When documents are eligible for destruction, you can review and delete the entire folder and any subfolders.

Many firms “archive” files. This typically involves moving files for closed matters to another directory. The problem with this is twofold. First, someone must move the files. That sounds easy, but someone needs to know when to move them and move them correctly. This does not always happen. Second, placing files in an entirely different directory means that they are separated from the rest of your files. Finding files in this other location requires an additional search or, at the very least, browsing within a second structure. All of this can be a great waste of time as it takes time to both move the files and often takes longer to find a file if you need it. You do not really need to move files to an archive if you are properly tracking the date they are eligible for destruction.

If you use dedicated document management application such you may have other options. These systems have a variety of tools that make the task easier. For example, NetDocuments allows you to set a “Closed Date” value on every workspace. It also allows you to set specific document retention rules and automatically notify you when files match those rules. Systems like these also allow you to do things in bulk. You could set a destroy date on every related document when a matter closes and, later, delete files across multiple matters based on destroy dates.

As you can see, good document management is critical to any document retention and destruction. You need to know when files are eligible for destruction, and you need to be able to find those files. You need to track when files are eligible for destruction. When you reach that date, you need to find the files. Finally, you need to destroy the files. These things are impossible without “a logical and consistent way of saving documents, so that we can find them later when we need them.”

Microsoft 365 and Document Management

Word, Excel, PowerPoint, and Outlook. These four Microsoft products, along with Acrobat from Adobe, are the most used applications in the law office, or any office. However, for years, the big four from Microsoft have been offered as part of a subscription package formerly called Office 365 and now called Microsoft 365. It’s no wonder the name changed. Microsoft 365 is about so much more than the four applications we associate with Microsoft Office. In this presentation, we will learn about some of the

other applications that go beyond Word, Outlook, and the other tools we are so familiar with. We will learn about an application that integrates with nearly every part of Microsoft 365 – SharePoint Online.

A Microsoft 365 business subscription is possibly one of the best software deals available. The Standard Plan, which for an annual subscription, costs \$12.50 per user per month get you email hosted on a Microsoft Exchange server, plus web and desktop versions of the Microsoft programs, including Word, Excel, PowerPoint, Outlook, and One Note. Those items alone are sufficient to make this a good deal. However, the additional included services that we are going to discuss in these materials are many, varied, and powerful. Further, they are extremely valuable and significantly increase the value of your Microsoft 365 subscription.

Microsoft Online

Your Microsoft 365 account is easily accessible from any Internet browser by typing **portal.microsoftonline.com** in the address field of any browser. The link will resolve to <https://www.office.com/?auth=2> or a similar specific link and open your Home page. You know you are in the right place when you see a horizontal list previewing Recommended files as well as a vertical list of other files. Clicking any file will open it.

If you look to the upper left corner, you will also see a home or house icon selected. Below the home icon are icons for other Microsoft 365 applications. You can open the online web edition of any of the applications from here, including Word, Excel, PowerPoint, and Outlook online. If you have avoided these online applications in the past, you should know that they can be used in almost the same way as their desktop cousins. The main difference is that these online versions cannot access certain locally stored functions like including macros, building blocks and autocorrect. If you use these features heavily, the online versions may not be for you. On the other hand, the online versions offer several features not found locally. First, you can co-edit documents online. In other words, two users can access the same document and make edits at the same time. Each user sees what the other is doing in real time. Second, documents are saved continuously as you work. If you have ever lost a document or your last ten minutes of work, you will know why this feature is a lifesaver.

Your home page is also the best way to access the applications we are going to discuss today. SharePoint is only the beginning, and we will explore how it integrates with OneDrive, Planner, and several other applications, all of which are available beneath the Home icon.

Hint: Since your home page and everything you do with Microsoft Online is happening in a browser, it can be handy to remember that you can open links in a new browser tab. For example, right clicking OneDrive in my list of home page icons allows me to open it in a new browser tab. This is very useful when you want to work in several applications at the same time.

OneDrive

Personal versus Business OneDrive

OneDrive is an application many of us have come across in one way or another. If you have purchased a new Windows based computer any time in the last several years, you have been asked to connect to or create a Microsoft or Microsoft Live account. As part of this, Microsoft OneDrive is setup and installed on the computer. This is a simple, personal version of OneDrive. Files (not only documents) saved to

OneDrive are saved to the cloud. These same files can be synchronized to your local computer or computer(s) allowing you to have them with you anywhere. This personal version of OneDrive provides a place to store and share files but is nothing compared to the Business version of OneDrive included with Microsoft 365. OneDrive for Business connects your files across your entire Microsoft 365 system.

Cloud Storage

Like the personal edition of OneDrive, OneDrive for Business files reside in the cloud. However, the personal edition has a storage limitation of 5GB. OneDrive for Business typically has a 1TB per user storage limitation. That is a lot of storage. The files are stored on Microsoft's servers which means they are encrypted as well as backed up.

Access Anywhere

Using the <https://portal.microsoftonline.com> link, you can access your files from anywhere and from any browser. You can also use the online versions of your apps to open and edit files anywhere. However, you can only open them locally if the computer has Office installed.

Local Sync

While OneDrive allows you to access your documents from anywhere, many people like to work locally. The sync feature of OneDrive keeps your online documents in sync with your local documents. This has both pros and cons. On the plus side, the local sync is available even in event you don't have Internet access such as a plane without WiFi or an Internet outage. On the other hand, all those documents take up space on your local drive. They also take time to sync. If everyone in your firm is synchronizing files, there will be delays and possibly versioning issues if two people want to work on the same document.

Security

OneDrive files are encrypted both at rest and in transit. This means that each file stored in OneDrive is encrypted with 256-bit encryption while on the server. When files are moving between datacenters or being transmitted to clients, it uses transport layer security. Only authenticated connections over HTTPS are allowed.

For added protection, your Microsoft 365 account can be configured for multi-factor authentication. That way, even someone with your login and password would also need your phone to access your files.

Shared Folders and Libraries

The real power of OneDrive Business is the ability to create and utilize Shared Folders and Libraries. A shared folder can be shared with anyone on your team as well as with users outside of your team. For example, you could create a folder called Client Documents with a subfolder for each client, subfolders for each client matter and additional subfolders for different documents. The entire folder structure can be shared with your team. In addition, a single subfolder within each matter can be shared with the client and serve as a location where they can upload, download, or view files.

A Shared Library also allows your team to store and access files that your team members work on together. Shared Libraries are automatically integrated with Teams and SharePoint Online. In other words, if you create a Shared Library for Firm Admin, your administrative team can work with those documents using OneDrive, Teams or SharePoint Online. These applications are full of features that we will look at later.

OneDrive Tips and Tricks

Choosing What to Sync

If you use the sync feature, don't sync everything. Sync files as you need them. For example, sync the files you will need if you know you will be disconnected during part of your trip. Another method is to sync your active matters only. Everyone synchronizing everything will lead to frustration.

SharePoint Online

SharePoint is a cloud-based service that is included with Microsoft 365 Business plans. SharePoint is designed to organize and share information to facilitate collaboration. Collaboration comes in the form of document sharing and co-authoring, shared tasks, shared notes, and other shared content. All of this occurs within a SharePoint "site."

Creating a SharePoint Site

Once you are logged into Microsoft 365, look for the SharePoint logo among the other logos on the far left and click it to open the SharePoint start page. A link at the top allows you to create a site. There are two site options – Team Sites and Communication Sites. A team site creates and allows collaboration within a particular team, which can be inside or outside of your organization. A communication site is a site intended to display published information. Most likely, you will start with a team site. One way to think of it is that a team site is where content is created and a communication site is where content is consumed.

Once you have selected your site type, you are prompted to select "members." These are the team members that will have access to your new site. For your first site, choose others from within your organization. Once you are finished with the initial selections, your site will be created.

SharePoint Site Features and Components

A newly create SharePoint site automatically contains a Home Page, a Documents page, a Conversations link, and a Notebook link. These links or pages appear on the left side of the site. The main page contains some default sections such as a banner and a list of documents. Home is your starting page whenever you open the site. To move around the site, click a link in the Navigation panel or on content on the Home page.

All of this can be customized. To edit the Navigation panel (and add components), select Edit at the bottom of the Navigation panel. Among the components you can add to a SharePoint site are two tools we will discuss in more detail below – Teams and Planner. However, these components are only the tip of the iceberg. To customize the main page, select Edit in the upper right and change the sections, columns and what displays in them. You can display the various components you have added to your site as well as a whole host of other content. In addition, you can customize how the content displays.

A document library is always added by default when you create a SharePoint site. This is a very powerful tool with many options.

SharePoint Online Teams Site

Microsoft Office Home

Get to the SharePoint Already -

https://acgdemov.sharepoint.com/sites/GettotheSharePointAlready

Not syncing

SharePoint

Search this site

JK

GS

Get to the SharePoint Already

Private group

★ Following

1 member

Published 1/10/2022

Edit

Home

Documents

Planner - Get to the Shar...

Issue Tracker

Notebook

Recycle bin

Edit

MGMT HQ

Countdown to Presentation

02 03 17 34

days hrs min sec

MGMT HQ@affinityconsulting.com

Documents

Planner

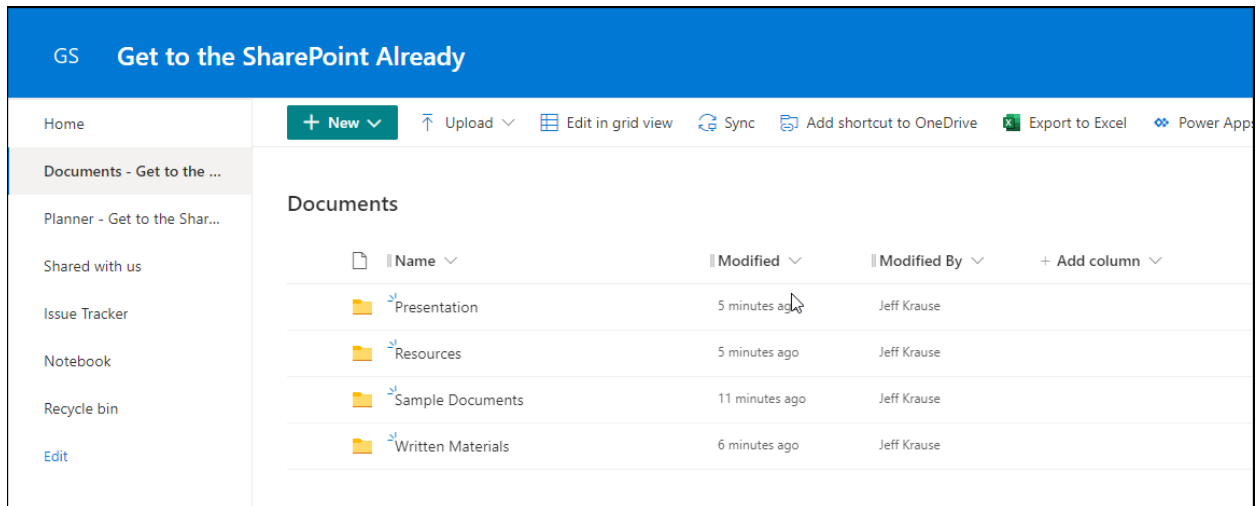
Issues and Calendar

Edit Your Site Navigation

Edit Your Site Layout

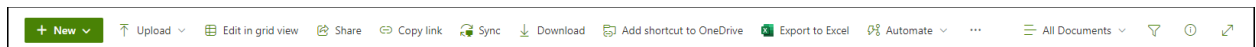
SharePoint Document Libraries

Every new SharePoint site includes a document library. This library is where documents and other content for the site are stored.



Document Library Toolbar

The document library toolbar offers a variety of functions. Some of these functions work only at the document library level while others are also available at the folder level.



+New

+New provides the ability to add documents and other content to the document library. The options always include Folder, Word document, Excel workbook, PowerPoint presentation, OneNote notebook and Link. Depending on your Microsoft 365 subscription, you may also have selections to add Visio drawings and other Microsoft files.

Upload

Upload provides the ability to upload files folders or templates. All Uploads start with a dialog where you select the items to be uploaded. Keep in mind that all Uploads are a "Copy" that creates a new file in SharePoint Online with the same name but a new create date.

Edit in Grid View

Edit in Grid View provides the ability to edit folder and document names as well as any SharePoint column data in a simple Excel type view. This is especially useful when you have added metadata columns to your document library.

Share

Share provides the ability to share folder contents with others. You can define who has access as well as their level of access in the next dialog. Options include Anyone, internal users, existing users or specific users. Each group can have Edit or View Only access.

Copy Link

Once a folder is shared, Copy Link displays a link from which people with access can access the folder. The link can be shared via email or other methods.

Sync

Sync provides the ability to sync the specific folder to a local computer via OneDrive.

Download

Download provides the ability to download the folder or the specifically selected files to your local Downloads folder.

Add Shortcut to OneDrive

Add Shortcut to OneDrive creates a shortcut to the selected folder within OneDrive. While this does not sync the files, it offers a quick and easy way to save files. Simply select the shortcut and save the file, the document is saved to SharePoint Online leaving only a shortcut appearing in OneDrive.

Export to Excel

Export to Excel exports a list of the folder contents to an Excel workbook. The resulting workbook includes more than just a list of the contents. Each document is hyperlinked back to SharePoint allowing the user to access the linked documents with a single click.

Automate

Automate provides the ability to create rules. For example, you could create a rule that you be notified whenever a new document is added to the folder.

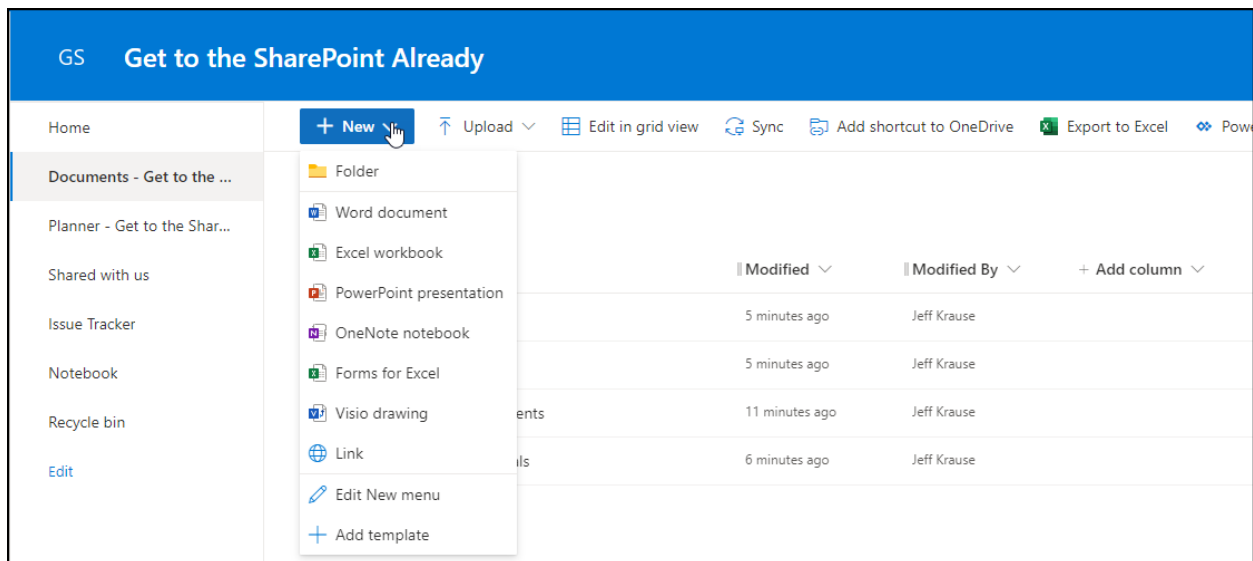
View Options

Several options allow the user to change how they view the Document Library or folder. Options include a List view (the default), a compact list, or tiles. You can even create new views. If you have created SharePoint metadata, you can also filter documents by metadata.

Working with Documents

New Documents and Folders

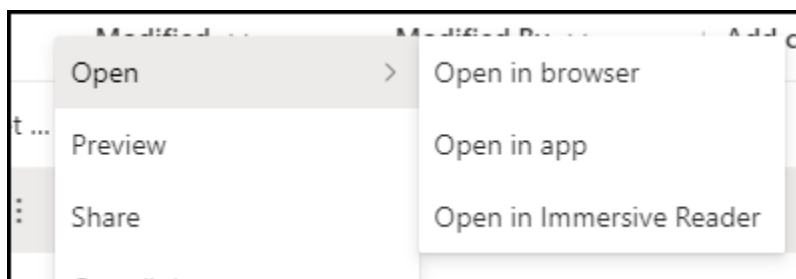
You can add content to the document library by clicking new from anywhere within the library. This feature allows you to create folders for organizing your content, create new Microsoft Office documents, add links and more. This content is of course available to all site members. In addition, you can add documents and other files by simply dragging and dropping them into any folder in the document library or using the Upload feature.



Working with Existing Documents

Documents stored in SharePoint can be accessed and worked with in a variety of ways. Simply clicking a document opens it in the online version of the appropriate application. Many users avoid the SharePoint Online interface because they do not want to work in, for example, Word online. However, this is not the only way to open documents nor is it the only thing that can be done with documents in SharePoint.

Selecting the vertical ellipsis after the document name reveals many document options. Several of these options include an arrow which indicates similar but related features. Open, for example, provides the ability to Open in browser, Open in App, or Open in Immersive Reader. If you don't want to work in Word Online, simply select Open in app from this menu and the document will instead open in the desktop app. For PDF files you can open in Adobe Acrobat. You are not limited to the browser editions.



Many of the other options available here are the document level equivalent of what we reviewed on the Document Library toolbar. Others are unique to documents. Depending on add-ins you have installed, it is possible you will see options beyond those listed below.

Finally, some of these options with only one document at a time while others work with all selected documents.

Preview

Previews the document in the browser window. Documents previewed in this way can be fully opened from the preview screen. You can also select and copy text from them as well as download, share, etc.

Share

Like the Document Library function, this provides the ability to define access to the document as well as copy and share links to the document.

Copy Link

Copy link copies the link information to your windows clipboard allowing you to paste it in emails, Microsoft Team chats and other places.

Manage Access

Manage access displays which users and groups have access to the document and allows you to make changes to that access.

Download

Download sends a copy of the selected document(s) to your local Downloads folder. If more than one document is selected, they will be combined and downloaded in a single .zip file.

Delete

Delete removes the document from SharePoint, assuming you have the rights to do so. Documents deleted from SharePoint are sent to a recycle area and fully deleted after 30 days. Within that 30 day window, the document can be recovered.

Automate

Similar to the Document Library function, Automate allows you to create rules around the document that notify you when specific things happen to the document, such as a modification.

Rename

Rename allows you to change the name of the document.

Pin to Top

Overrides the default setting that displays documents alphabetically by name. Instead, the selected document will be displayed at the top of the current list.

Move To

Move the document to another location within the Document Library.

Copy To

Create a copy of the document in another location within the Document Library.

Version History

Displays a list of versions. SharePoint automatically creates minor versions of the document as changes are made. This gives you the ability to revert to a previous version should the need arise.

Alert Me

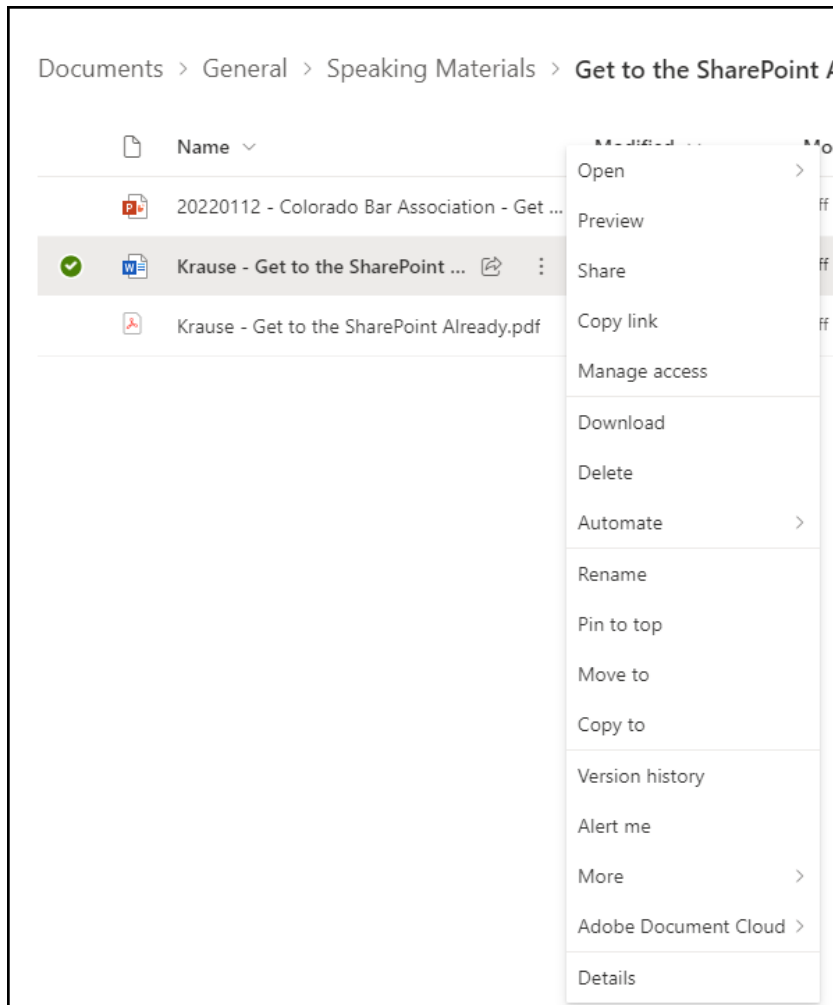
Alerts you when specific things happen to the document such as a rename or a modification. You can control how you receive the alerts. This feature is limited compared to Automate but it is also simpler to use and provides precise control over the functions it does allow.

More

Provides a menu of informational functions including Properties and Check Out. For example, checking out a document tells other users that you don't want it changed until you check it back in.

Details

Displays an informational panel on the right side of your screen. The panel contains a small preview, a summary of who has access, details of any metadata and other useful information. It also allows you to change some of the displayed information.



Document Metadata

Metadata is data that describes or gives information about other data. In traditional document management systems, metadata includes such things as client, matter, document type, author, etc. The benefit of adding metadata to your documents is that metadata is searchable and sortable. In other words, you can do precise searches for metadata and use metadata to display your documents in a variety of ways.

SharePoint supports document metadata by allowing you to configure additional columns within a document library. For example, you can configure a column for metadata such as document type. The metadata field is available on all documents within the document library and appears as a column in

every list of folders and documents within the document library. You can fill data into the field by entering it directly into the column (the edit in grid view is particularly useful for this) or by selecting Details from the document options and entering the metadata. Metadata can use several formats ranging from simple text to lists of choices to dates to yes/no. It can be required or option.

The impact of metadata is twofold. First, metadata is a visual tool. When viewing lists of documents, metadata will appear in the defined column. Since a list of documents can be sorted and filtered on any column, you can easily see documents sorted by metadata or filter for a single metadata value.

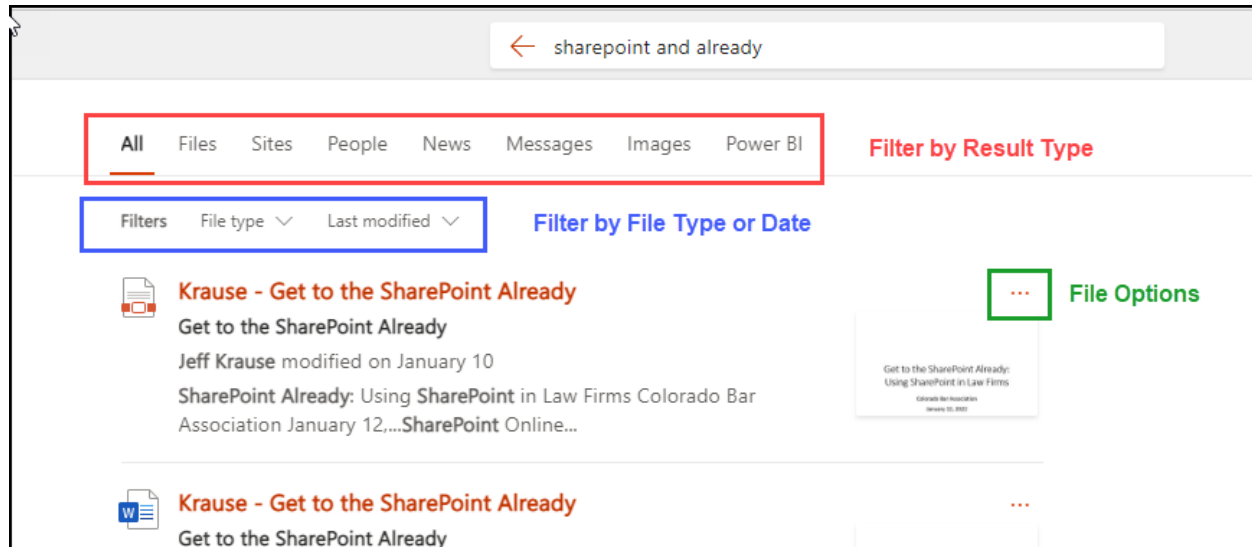
Second, metadata is searchable as discussed below.

Searching SharePoint

SharePoint relies on indexes to provide a fast but in-depth search experience.

You can search SharePoint at several levels. To search documents within a document library, simply select the document library and type your query in “Search this library” at the top. To search an entire SharePoint site, select the site and type your query in “Search this site.” To search all of your SharePoint sties at one, go to SharePoint Home and type your query in “Search in SharePoint.” You can even search your entire Microsoft account from the Office home.

When you search using any of these methods, a results filter appears. The default is to show all results, but this filter allows you to narrow your search to by Files, Sites, People, etc. or by File Type and Last Modified Date. A File Options selector offers some of the same options available to documents in a library including open in browser or app, share, etc.



Simply customizing a column does not make the values in that column searchable. However, it does provide that ability to sort and filter search results by that column.

To make the column values searchable, the column needs to be configured as “Managed Metadata.” A Microsoft 365 administrator with SharePoint administrator rights is required to set up Managed Metadata. Most users cannot do it on their own.

Sync and Shortcut

Finally, two features of the SharePoint document library allow you to extend the usefulness of the library. “Sync” creates a local OneDrive folder where you can work on documents locally and stay synced with the library. Use this with caution. It is not always necessary to sync the files because it is so easy to work with them online. Also, the very nature of sync can lead to delays and versioning issues. If everyone is syncing everything, things naturally take a little longer and if two people need to work on the same document they may need to wait. They might also make simultaneous modifications to their local document which means the document in SharePoint is no longer a true master.

A second feature is more useful. “Add Shortcut to OneDrive” adds the document library to your list of OneDrive locations. For users, the shortcut looks and acts like a OneDrive location but it is actually a shortcut to the SharePoint library rather than a copy of everything. This is very useful as it allows documents to be saved to OneDrive without the need to even open SharePoint.

SharePoint as a Document Management System

SharePoint is a viable document management system for lawyers. This is especially true where there are a smaller number of users or a small number of critical documents to be managed. However, as the number of users grows, more control is typically required which requires more administration and more knowledgeable SharePoint administrators. That said, for most small firms, SharePoint has great potential.

The biggest question is whether to create one SharePoint site with one document library or multiple sites with their own libraries. A single site with one library is easier to use because users have less steps to navigate. On the other hand, multiple sites with their own libraries opens the full power of SharePoint. Planner, Site Notebooks and the many other SharePoint features are very powerful, and they work best for a site limited to a smaller topic such as a client or a single client matter.

Avoid syncing everything. Use Shortcuts to OneDrive instead which work in a similar fashion without the technical issues.

SharePoint Tips

Migrating to SharePoint

Migrating to SharePoint looks very easy and is if you don’t mind a few “inconveniences.” Simply creating a document library in SharePoint and dragging documents into it will upload the documents to SharePoint. Similarly, creating a shortcut to OneDrive from the SharePoint site allows you to copy files to the shortcut which uploads them to SharePoint. Lastly, some firms sync to OneDrive and then have users copy or move their files to OneDrive. For technical reasons referred to above in the Sync and Shortcut section above, I don’t recommend this last approach. It is, however, easy and intuitive for users so, if you use it, turn it off when the migration is complete.

There are two things to know about these methods. First, dragging and dropping and copying to a OneDrive shortcut copy the documents rather than move them. If you are migrating, you will want to delete the local documents once they have been copied. You could cut and paste to a full OneDrive sync. This is a move but you might experience some of the sync issues discussed earlier.

Second, any time you copy a document, you are in effect creating a new one. This means that the properties of the document will show the date of the copy as both the created date and the last modified date. This can be a real issue for some law firms, especially resetting the create date.

There are third party utilities that will preserve the create date. Files2Go (<https://www.thinkscape.com/SharePoint-Online-File-Migration-Tool/>) is one that I have used in the past. You can use it to create a map (a spreadsheet where you identify which Windows folder goes to which SharePoint location). The utility follows your map to migrate the documents. As part of this process, it preserves the created date. The utility is priced based on how long you will need it. For example, \$200 for one month.

Saving to SharePoint

Personally, I often work online. I do this far more than I thought I would. I open documents from SharePoint directly. Those documents open in Word Online, save automatically as I work on them and are returned to SharePoint when I close the Word browser tab. Word Online does not include several features found in the desktop application but it has most of them.

Creating a new document in SharePoint using Word Online is also very easy. Simply go to the SharePoint location where you want to create the file. Click New and select whatever type of file you would like to add.

If you prefer to work in the desktop app, you have several options. Working with existing documents can be done by selecting the document options function in SharePoint and then using Open in App. This will download and open the document in Word, for example. Make your changes and save.

You can also work from Word if you have configured a few things. If, for example, you have configured a sync or shortcut to OneDrive, OneDrive will appear as a location when you click Open or Save in Word. You can also configure a connection to SharePoint by adding it as a location in Word, Excel or PowerPoint. This allows you to choose a SharePoint site to save to.

Finally, there are SharePoint overlays such as Epona or Colligo. These products streamline the save process by displaying SharePoint whenever you select open or save in an office application. Another SharePoint tool is ZeeDrive which displays SharePoint libraries as if they were mapped network drives.

Saving email is a bit more work. You can save emails one by one by selecting Save As in Outlook. This works if you have configured a OneDrive sync or shortcut, or a connection to SharePoint. Epona and Colligo offer the ability to save many emails at once to the same matter. Epona even creates mapped folders. If you have multiple monitors, you can drag and drop emails from Outlook to SharePoint on the other monitor.

Planner

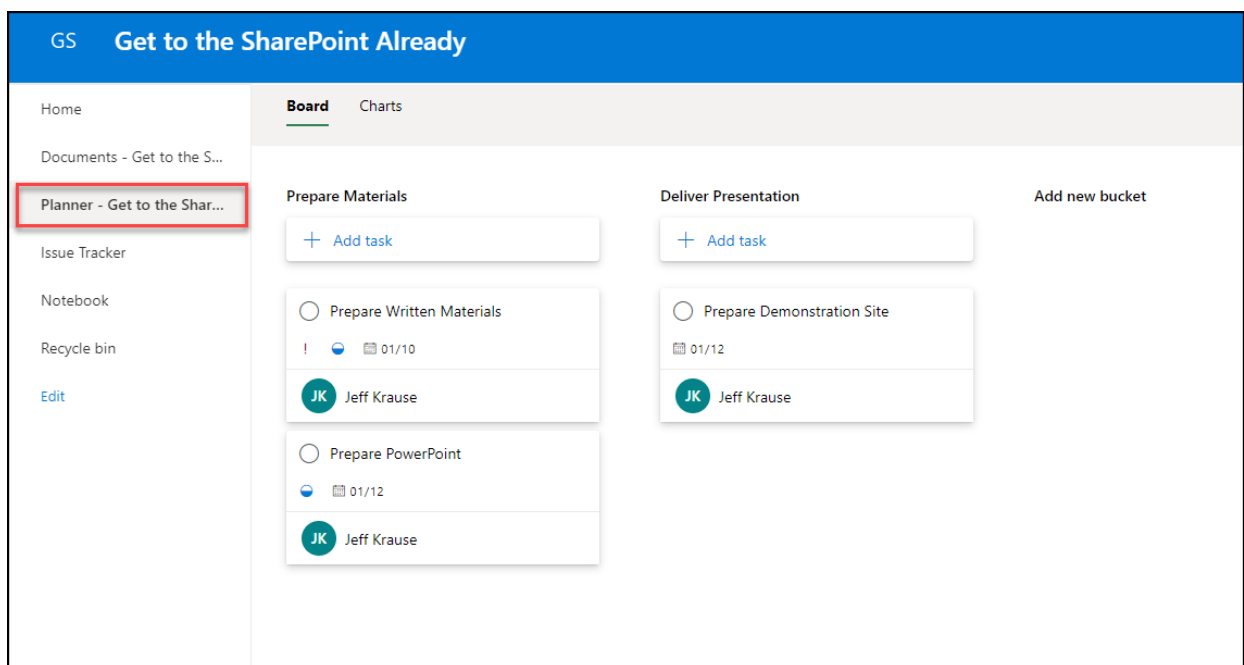
Planner is Microsoft's solution for project management. If you have ever used Trello or Asana, then you have an idea of how it works. You can use Planner to keep track of your to do list as well as big picture items.

Plans can be created separately or as part of single SharePoint site. For example, in a litigation matter, you might identify witnesses that you want to depose, note people you need to send a subpoena to, etc.

These are things that will take place in the future. However, you want to make sure that you keep them on track and get them done. You can also add due dates, so that you know when you need to complete each of the topics on the list.

Often the items that appear in Planner are the items that need to be completed, however, they don't need to be done right away.

Below is a sample Planner Board. Please note that Planner, Trello, and other services like them are built around a work philosophy known as Kanban. Kanban started as a scheduling platform for lean manufacturing at Toyota. To fully maximize the benefits of a project management tool like Trello, you can check out books such as *Personal Kanban: Mapping Work | Navigating Life* (<https://www.amazon.com/Personal-Kanban-Mapping-Work-Navigating-ebook/dp/B004R1Q642>) or *The Lean Law Firm* (<http://www.leanlawfirmbook.com>).



This Planner board is obviously an example, but it shows some of the things that you can do with it. You can see that the board has multiple different columns or buckets. You can easily move items between any of the three columns and can easily rearrange or re-order the items any way that you want.

You see that you can access a variety of additional information from this Planning Board. For example, you can assign an item to a particular person. You can also assign a due date for the item to be completed. The task also allows you to create a checklist, so that you have a checklist of items to be completed for each task.

Further, if you open the task, you see other fields that you can complete. You can add a label to a particular item. You can track the progress of a task from not started, to in progress, to completed.

In addition to the due date, you can include a start date, as well as assign a priority level to the task. You can add notes to clarify or provide further information about the task. Also, you can add an attachment.

Finally, you can add comments for your own reference or for the use of whoever is assigned to complete the task.

The screenshot shows a task card titled "Prepare Written Materials" with a status of "In progress" and a priority of "Important". The task is assigned to Jeff Krause. It includes fields for "Start date" (01/01/2022) and "Due date" (01/10/2022). There is a "Notes" section with a text input field. Below the notes is a checklist with four items: "Create presentation site", "Screenshots for materials", "Submit materials", and "Add an item". A "Show on card" checkbox is checked. There is an "Attachments" section with an "Add attachment" button. At the bottom, there is a "Comments" section with a text input field and a "Send" button. The card is owned by Jeff Krause and was last changed moments ago by him. The timestamp at the bottom right is January 10, 2022 11:57 AM.

Prepare Written Materials
Last changed moments ago by you

JK Jeff Krause

Add label

Bucket: Prepare Materials

Progress: In progress

Priority: Important

Start date: 01/01/2022

Due date: 01/10/2022

Notes
Type a description or add notes here

Checklist 0 / 3

- ☐ Create presentation site
- ☐ Screenshots for materials
- ☐ Submit materials
- ☐ Add an item

Attachments
Add attachment

Comments
Type your message here

Send

JK Jeff Krause

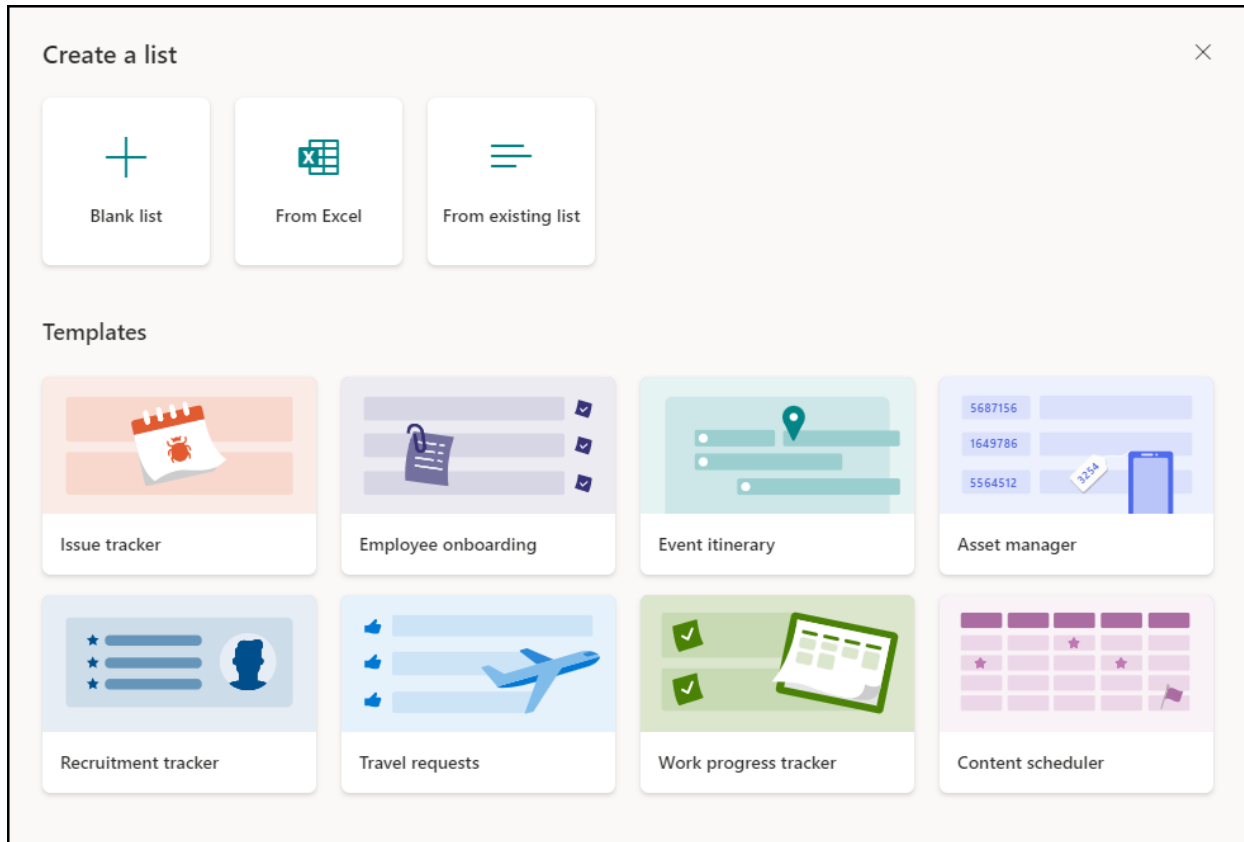
January 10, 2022 11:57 AM

The purpose of Planner is to establish a plan for all the tasks that need to be completed for any matter or project. In this way, you can account for everything that needs to be done, and plan for the time for it to be done.

You can access Planner via the Web and on iOS and Android mobile devices. Currently, there is no local application.

Lists

SharePoint Online includes a useful List feature. Lists can be added via the New Features selector. Eight list templates are included including Issue Tracker, Asset Manager and Work Progress. You can also create a blank list or import one from Excel.



As the templates imply, Lists offer a variety of functions and are adaptable to many others. Litigators could use Issue Tracker to note issues and how they intend to resolve those issues. Estate Planning attorneys might use Asset Manager to log, track and report on estate assets.

Like OneDrive and Planner, List is available as a separate online application with Microsoft 365. However, the usefulness of these features is greatly increased when integrated with a SharePoint site.

SharePoint and Teams

If you are using Microsoft Teams, you already know how valuable it is as a collaboration platform. Teams can be taken to the next level by integrating it with SharePoint online. Integration is easy because a SharePoint Online site automatically creates a Microsoft 365 group. This group can be used to create a Team.

Once you have created your Team, you can add tabs that display and allow you to work in your SharePoint site from Teams. For example, you can display your SharePoint site's Document Library, Planner, or List within Teams or simply display the SharePoint site to access these features.

The screenshot displays the Microsoft Teams interface. On the left is the navigation pane with icons for Activity, Chat, Teams, Calendar, Calls, Files, Approvals, Apps, and Help. The main area shows a team named 'SharePoint Demo and Training - Corp...' with a 'General' channel selected. At the top of the channel, there are tabs for 'General', 'Posts', 'Files', 'SharePoint Site', 'Document Library', and 'Planner'. A red box highlights the 'SharePoint Site' and 'Document Library' tabs, with a red arrow pointing to them and the text 'SharePoint Features'. Below the tabs, the 'SharePoint Site' tab is active, displaying a webpage for 'CBA Colorado Bar Association' with a prominent email address 'MGMTHQ@affinityconsulting.com' highlighted by a red box. Below the webpage, there is a 'Documents' section titled 'Documents - Get to the SharePoint Already'. This section contains a table with columns for 'Name', 'Modified', and 'Modified By'. The table lists a folder named 'General' which was modified '9 minutes ago' by 'Jeff Krause'.

Name	Modified	Modified By
General	9 minutes ago	Jeff Krause

Microsoft Teams

Microsoft Teams is a powerful collaboration application designed to keep your team organized and have conversations. Because Teams can be used online via a browser, as a desktop application or on a mobile device it is a tool that your team can access and use anywhere.

Creating and Working in a Team

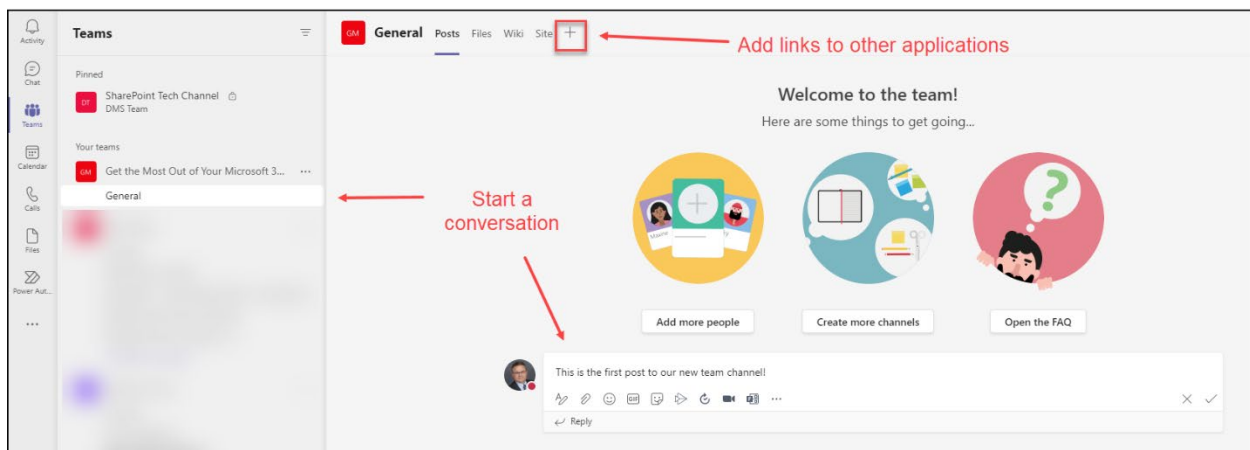
As the name implies, the tool is about work as a team. When you create a Team, you choose the members like SharePoint. The application then creates a team along with certain collaboration features. Among these features are Posts, Files, Wiki and (if you created the team from SharePoint) Site.

Posts allows your team to have conversations, but this is far more than a simple chat tool. Posts can also be used to share links and even documents.

Files displays documents saved by and for your team. If you created your team from SharePoint, this will create and display a General folder on your site.

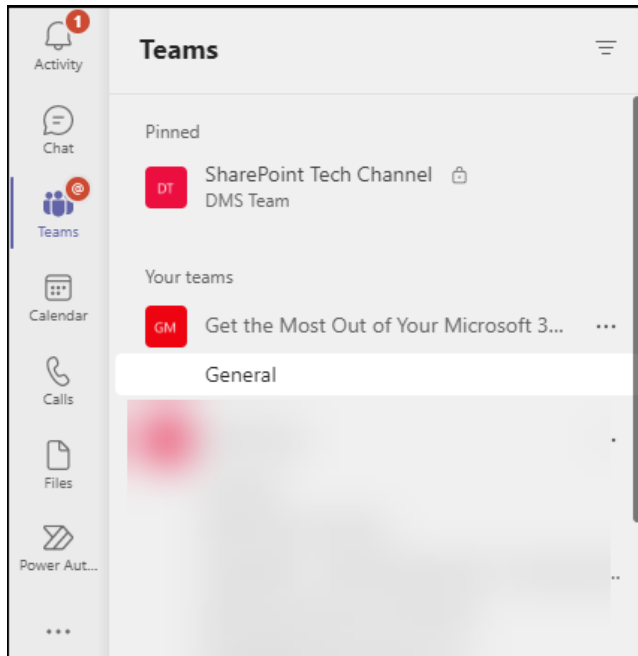
Wiki is essentially a feature rich notebook for your team. As you add content, it is automatically organized in sections along with a table of contents.

Site appears if you created your team from SharePoint and displays the original SharePoint site.



A host of other applications can be added once the team is created. These include everything from Microsoft apps like Planner to legal applications like NetDocuments and Clio to other useful tools like Lucidchart.

Other Features of Teams



Teams is much more than the very useful main display. Along the left edge of the screen, a series of icons takes you to other features.

Activity alerts you to activity within Teams. It keeps you updated as files are uploaded, conversations are started or continued, and when you receive calls or messages,

Chat allows you to have conversations with individuals or groups of individuals. They don't have to be members of any specific team. They can be anyone within your organization. Like any Teams channel, these chats can also contain shared documents and other things.

Calendar displays your Outlook calendar within Teams but also allows you to schedule and start meetings within Teams. These meetings do not

require anything other than Teams.

Calls allows you to make voice and video calls. This feature requires a connected phone system.

Files displays all documents that you have recently accessed from teams, all documents you have access to in teams, and all documents you have downloaded with Teams. It also includes a link to OneDrive.

Teams may also display other applications that you have specifically added, such as Power Automate in the screen capture above.

While these features might sound overwhelming, Teams does a great job of integrating them. For example, you can start a video or voice call with every member of a team from the Posts channel of that team. You can do the same thing from a Chat or from the Calendar. It all works together.

If Teams has a drawback, it is the fact that it is so easy to use. If not carefully planned, your list of teams will quickly grow and could become unusable. Documents can also end up siloed with the various teams. Before using Teams for the features, we have described, test it within smaller groups and come up with a plan.

About the Author

Jeffrey S. Krause is a Wisconsin attorney and a partner with Affinity Consulting Group where he is a member of the document management, management consulting and practice management advisory teams. He has spent more than twenty years assisting legal organizations of all types and sizes choose the right technology and use it the right way.

Jeff writes and speaks on a variety of topics related to legal technology and efficiency. He is a long-time planning committee member and a past chair of both the Wisconsin Solo and Small Firm Conference as well as the Milwaukee Bar Association Law and Technology Conference.