

A. COMPANY INFORMATION								
1. Company Name	Crowther Consulting Corporation	Document Automation Developers, LLC	KI Systems, Inc.	Kraft Kennedy & Lesser, Inc.	Legal MacPac	Payne Consulting Group, Inc.	SoftWise Corporation	Technology Services Consulting Group
2. For further information, contact:	Eric Crowther	David E. Kiefer, Esq. Director of Systems Development dkiefer@docauto.com (888) 4-DAD-LLC	Kristi L. LeaMaster, 425-402-0791, email: kristil@kisys.com  KI Systems, Inc. 9310 – 176 <sup>th</sup> St. SE Snohomish, Washington 98296  Visit our web site: www.kisys.com	Phone: 212-986-4700 E-mail: sales@kklsoftware.com Web: www.kklsoftware.com	Linda J. Sackett lsackett@legalmacpac.com www.legalmacpac.com	Shirley Gorman, 206-344-8966 or 1-888-GoPayne E-mail: Info@payneconsulting.com	MOkon@SoftWise.net	Vick Beyrouti (310) 441-0100
B. PRODUCT INFORMATION								
1. Package Name w/Version#	CCC Macro System	Legal Macro Library Numbering Suite v2.0 Legal Macro Library Deluxe Bates Numbering Tool for Word v 2.0 MakePDF for Word v 4.0 Custom Suites	Law Office Automation Tools 97 Law Office Automation Tools 2000 Law Office Automation Tools 2002 (Office 11 upon release)	<b>ezTemplates</b> - This includes macros and templates for the word processing system, plus the following: ezNumbering - KKL's paragraph numbering solution for Microsoft Word. ezSearch - Provides integration with several contact management programs. Recall - Allows users to save and re-use dialog box selections for creation of templates or paragraph numbering schemes.	Legal MacPac	Metadata Assistant, Numbering Assistant, Forms Assistant, Address Assistant, Agreement Assistant, File New Assistant, Outlook Relationship Assistant	Innova™ 5.0	WordAssist v2000
2. Compatible with Microsoft Word? Versions	2000 / 2002 (XP)	Yes	Yes.  Word 97; Word 2000, Word 2002, Office 11 upon release	Compatible with Word 97, Word 2000, and Word 2002 (aka: Word XP). Some customization is required for the product to work with	Word 97, 2000, Word XP	Microsoft Word 97, 2000, 2002, Office 11 (beta)	Word 97, Word 2000, Word XP	Office 2000, Office XP

				Word 97.				
3. Compatible with WordPerfect? Versions	8, 9, 10 (2002)	No	No.	Compatible with WordPerfect 7 and higher. Some customization is required for the product to work with WordPerfect 7.	WordPerfect 7.0, 8.0, 9.0, 10.0	N/A	N/A	N/A
4. How is your macro package structured in terms of VB, VBA, ini files and dlls?	Mostly VBA code stored in Office templates; some MS-Access database files used to store firm and user-specific options and data	All products are primarily done in VBA. MakePDF for Word requires additional DLLs. Custom Suites may use VB, VBA, Custom INI files, DLL files, COM Objects, and databases as specified by client.	<p>KI Systems Law Office Automation Tools are designed as an Enterprise system and include two primary components:</p> <p>Macros and Templates that leverage a central SQL Server database for Employee, Office Location, Logos, Firm preference settings and Form Bank components.</p> <p>Integrated SQL Server Contact Management, Marketing and Case Lists via the Enterprise Address Book.</p> <p>The macro package is a combination of high-end Word templates that utilize</p>	Most dialog boxes are VB DLLs. DLLs are kicked off by VBA (or PerfectScript in WordPerfect). INI files are used to store firm specific information.	Legal MacPac is an object-oriented application built in Visual Basic (VB) 6.0. Functionality is exposed as a set of ActiveX components. Components are divided into a core set and a macro package set. Each core component exposes a well-developed COM object model that implements essential MacPac functionality. Components are task-segregated, so that each component is responsible for one major function of the package. They are distributed for runtime use only and allow us to effectively distribute updates to the product to all clients participating in one of our support or partnership programs	<p>We keep very little code in templates; instead, our templates have short "stub" procedures that then call much more sophisticated procedures in .DLLs (in-process servers). These DLL files are written and compiled in Microsoft Visual Basic 6.0. [NOTE: All our EXE, DLL, and DOT files are signed using a Verisign digital certificate.]</p> <p>We typically store some information in the registry in either HKEY_Current_User or HKEY_Local_Machine, depending on the nature of the information. We tend to avoid .INI files, but can use them if a particular client wants to avoid the use of the registry. Much of the client-specific information is maintained in databases.</p> <p>The Forms Assistant may be configured to</p>		Contains templates (.dot) with VBA code, COM objects and Add-ins (both DLL's) and one configuration file. WordAssist may also provide and SQL application including SQL Stored Procedures

			<p>VBA for dialog forms, wizards and native document automation/formatting. It also utilizes Windows API calls for security and platform independence, as well as KI Systems SDK components. KI Systems SDK components expose a comprehensive set of function calls that provide easy access to the core components and functionality of our system including access to SQL Server based data. KI Systems SDK components are provided as compiled Visual C++ DLLs and EXEs.</p> <p>New for KI Systems Law Office Automation Tools 2002 is the enhanced configuration for the client workstation. KI Systems implements a Client Connection Manager using ADO and XML technologies. The Client Connection Manager is utilized within Office XP applications and our desktop executable provided by KI</p>		<p>component is distributed to clients that participate in the MacPac Development Partnership program.</p>	<p>pull user data such as attorney names, direct-dial and email information, bar numbers, signature preferences, etc., from a local or central data source (typically Access or SQL Server relational tables). Alternatively, we also offer a zero-administration option, which means that instead of accessing this data from a database, the product will simply remember all the data from, for example, the last 10 authors that have been used to create a letter.</p> <p>The Numbering Assistant uses a local or central database to hold firm-standard numbering scheme data. User-created numbering schemes are stored in a separate Access database. Each user who logs into the computer can have his/her own custom numbering schemes.</p>		
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			<p>Systems that provides application independent access to the SQL Server Enterprise Address Book. Technical components that support the Client Connection Manager include: KIAB.dll, KIForms.dll, KIStore.dll, KIABENT.exe, ABKI32.dll and KIServer.dll.</p> <p>Note: KI Systems supports Microsoft SQL Server 7.0 or 2000. For firms less than 25 desktops KI Systems provides Microsoft's run-time version of SQL Server – Microsoft Data Engine (MSDE).</p>					
5. Which do you use (VB, VBA, ini files and dlls) and where are they stored on the server and on the client?	VBA; global templates are stored on the server and the workstation and are updated automatically when users log into the network; the system runs on the local workstation so that it runs faster and so that the macros are available when the workstation is not attached to the network	All products are workstation based and do not require any server components, unless specified by client. In general, templates are stored in Application Data subdirectories appropriate for the client's installation of Word. Additional files may be added to Windows System directory or separate Program directory if necessary.	KI Systems Law Office Automation Tools are designed to install client components (DOTs, VB Com Add-in DLLs, VBA code, C++ DLLs, EXEs) to the local workstation; however, software may be configured to run from a Network Server, via Citrix or Terminal Server. The SQL Server Database is installed on a Network SQL Server. The SQL Server Database	All files can be stored on either client workstations or servers. Of course, storing files only on the server will prevent the macro package from being used when offline.	Legal MacPac uses VB, VBA, ini files, dlls, and Jet 4.0 databases. The macro package is designed to run locally, but can also run from the network or terminal server. Optionally, Microsoft SQL server can be used instead of Jet 4.0 databases.	This is based on the client's wishes. For .DOT templates, the files can be stored on a server or on the local hard drive. Our DLLs are stored on the local hard drive in a <Program Files>\Payne Consulting Group\ folder. Database files can be stored locally or in a network location.	Innova uses the following file types: EXEs (VB6 and C++), Active X DLLs, Custom OCXs, Word templates. Although the file locations are completely flexible upon install, the Innova application is typically installed fully locally.  All customization data is stored in a SQL database (an option to store the data in an Access database is available	All files are stored on the client PC. Templates and DLLs are stored under a TSCG directory structure, but the firm can specify any directory structure it requires. Stored procedures are created on the SQL Server

			commonly resides on the same server as the firm's document management system.				<p>for smaller sites). The client workstation runs on an MSDE database, to provide for disaster contingency and 100% functionality in "off-line" or "mobile" mode.</p> <p>The installation process uses the market leading product from InstallShield. There are two steps to this process. An Administrator Installation is performed first, whereby the SQL/Access database is created and configured for use. A Client Installation is then performed, whereby a full file set is installed to the local workstation. Since the installation process is based on Windows Installer 2.0 technology, full capability to Add/Remove components, Modify or Uninstall are available at any time after the initial installation.</p>	
6. What is the directory structure of the files your product installs on	Determined on a case-by-case basis; typically a single parent folder with	N/A	If a Network Server, Citrix or Terminal Server for the client is selected, files can	Any directory structure can be specified.	Files can be stored in any location on the server (or local workstation), as long	If the client wishes a "server" install of our templates, we typically work with	No files are installed to the server. Only the database is created on the	N/A

the server?	subfolders, placed in the applications area of the server		be stored in any location. KI Systems program installation and MS Office File Location parameters are completely configurable. For KI Systems our program installation would commonly be <drive letter>:\KI Systems\.		as users have rights to the directory.	them to determine the best file structure for their needs. We do not have a fixed structure.	server.	
7. What is the directory structure of the files your product installs on the client?	Determined on a case-by-case basis; typically a single parent folder with subfolders, placed at the root of the hard disk drive	Most files under Application Data/Microsoft/Word/Startup and Application Data/Microsoft/Word/Templates.	If a local drive installation for the client is selected, files can be stored in any location. KI Systems program installation and MS Office File Location parameters are completely configurable. For KI Systems our program installation would commonly be c:\program files\KI Systems\.	Any directory can be specified. Typically, all files will be installed in a KKL folder underneath the "Program Files" folder.	The structure can be modified according to the firm's needs. By default, the application is installed to c:\Program Files\MacPac.	Our DLLs are in the <Program Files>\Payne Consulting Group\ folder. Our STARTUP type templates are either placed directly into the STARTUP folder or, more commonly, a shortcut is placed in the STARTUP folder that points to .DOT files in the <Program Files>\Payne Consulting Group\ folder.  Document templates, such as Fax, Memo, Letter, and Pleading, are located in the Word Template folder (e.g., <Program Files>\Microsoft Office\Templates\<Client Name>).	The Client Installation defaults to C:\Program Files\SoftWise\Innova, as per Microsoft best practices. This default directory is changeable by the installer. There are a series of directories below Innova, which are not changeable by the installer.	Customer determines the structure that fits their needs and WordAssist can be installed accordingly
8. To what extent can clients customize code in your product?	As desired, though some modifications require knowledge of VBA, and Crowther Consulting does not	Fully customizable.	KI Systems Law Office Automation Tools provide two levels of customization. By	A large amount of customization can be done in the templates, or in the INI files. For	MacPac has been designed to provide as much flexibility for long-term development as	Clients can customize the graphics (i.e., firm logos), lists, AutoText entries,	Innova offers the same unique dual-layer architecture as did its predecessor MacroSuite®. Our	WordAssist is built with a modular approach and COM interfaces. Core code cannot be modified

	<p>take responsibility for the consequences of such changes.</p>		<p>default all template layout specifications (i.e. styles, page layout, paper tray, header, footer, document formatting and default text layout, firm logo and location, user preferences, etc.) may be modified by the customer. For customer's wishing to modify Wizards (VBA code) and document assembly processes - we offer a full SDK and sample code that enables customer's to create custom processes or full replacement modules.</p>	<p>example, clients can modify electronic letterhead, change style attributes, or add/remove items to selection lists such as Letter Closing. Clients cannot modify the actual source code.</p>	<p>possible. Our design goal was to provide a product that would not only meet a firm's current macro requirements, but allow for any future customization.</p> <p>Administrators can extensively customize the package by editing Word boilerplate documents and our Access database. The application can retrieve data from any ODBC/OLEDB data source – lists from DocsOpen, iManage, InterAction, Elite, etc. can be used in MacPac real-time . Personnel data can be stored in any of these sources. Client/matter numbers and related client/matter information can be retrieved from an external source such as a DMS or CRM. Lists of default letter salutations can be configured to appear in salutation dropdowns based on contacts selected from various CRMs.</p> <p>Since source code to the macro package component is distributed, virtually</p>	<p>formatting, and text used by our product.</p> <p>With our Forms Assistant, we store much of the variable data in an administration database, so there is rarely any need to modify the underlying code.</p> <p>The document templates themselves (i.e., Letter, Memo, Fax, etc.) do not contain any code at all. The customer is free to format them in any way desired as long as they are careful to retain any special-purpose styles, bookmarks, or field codes used in our automation. Most customizations can be completed without any modification to existing code. Clients can easily add new templates to the Forms Assistant by simply copying an existing template to create a new template, making sure that they do not delete any requisite bookmarks or styles in the new template.</p>	<p>core engine layer is locked so that we can provide a foundation of stability and consistency across our entire client base. Our customization engine layer is open and documented and provides for a tremendous amount of flexibility in fitting the overall product to your site-specific needs. With this architecture, product updates (service packs) and upgrades (new versions) are very easily to implement, as they have minimal effect on the customization layer.</p> <p>Almost all product customizations can be done without any need for programming. The scope of customizations can run from simple management of drop-down lists to the resizing/repositioning of any control on any dialog, as well as the manipulation of all control properties on the dialog to designing entirely new dialogs and associated templates. This</p>	<p>by clients. But all custom code that is part of the templates that are built for the clients like letter, fax and memo is owned by the client</p>
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					<p>the entire user interface can be customized. In fact, a firm can develop their own user interface from scratch, hooking it up to the functionality provided by the core components. In addition, core component functionality, like our contact integration component, can be used for non-MacPac development.</p>		<p>process is either done through a GUI interface provided by our Administrator module or through direct work with Word templates. A user would only need a solid comfort level with working with Word styles and bookmarks to customize the standard templates. If more robust customization is needed, the Innova core engine provides "hooks" into the custom modules so that additional custom VBA routines can be run at key points during the execution of each major assembly module (Letter, Memo, Fax, et. al.).</p> <p>Our product is designed as an open model; that is, we offer regularly scheduled public training courses which detail the process by which Innova can be installed, customized and maintained on an ongoing basis. You can customize Innova yourself, or you can elect to work with any one of our authorized</p>	
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							Implementation and Consultant Partner organizations around the country. Innova Implementation Partners are trained experts in the installation, customization and support of Innova and can assist you in getting a project off the ground in a surprisingly short period of time. The product ships with several sample templates and forms, which can be copied and/or modified, as desired.	
9. What part of your code is locked?	None. A password is established to access the code, but that password can be provided to the client upon request.	None, except for MakePDF for Word.	KI Systems Law Office Automation Tools are distributed as password protected VBA Templates and compiled Dll's and Exe's. The SDK provides the open architecture that enables customers to create custom processes or full replacement modules. The compiled Dll and Exe code is locked.	Most of the code is in compiled DLL form, and is locked.	Almost all code is distributed as compiled dlls and is therefore "locked".	Our core code is "locked", but those with documentation for our object models can create new applications by calling into our .DLLs with their own applications. For instance, additional client-created templates can be added to existing templates included in the Forms Assistant. Existing documents, such as letters and pleadings, can be copied and modified as required. For example, perhaps a subsidiary office has a letter template that varies significantly from the firm's main	See answer to #8 above.	All of WordAssist core code is locked. All custom client code is not

					<p>letter template. A copy can be made of the letter template, and then formatting, header and footer graphics, styles, etc., may be changed. When the subsidiary letter template is run, the appropriate Forms Assistant input form will automatically be launched, and all of its features will be available to the new letter.</p> <p>The core code that communicates with the databases, as well as code that pulls from the various contact managers (i.e., Outlook, InterAction, GroupWise, etc.) is proprietary. This also includes the code that controls the mechanics of transferring data from the userform (dialog box) into the document, and then back into the userform again.</p> <p>While our core code handles the coming and going of all this data, the client can simply pick and choose which "pieces" of data will show up in a given document template.</p>		
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						This allows us to minimize the level of customization needed in our core code modules, and handle a good deal of it at the point where the data "surfaces."		
10. Can the client purchase the locked code? Comments	No. The intellectual property belongs to Crowther Consulting. Client may modify the code for its own purposes, but not for re-sale or licensing purposes.	Yes.	No.  The SDK can be purchased enabling full customer development.	Source code is not available under the standard per-user licensing arrangement.	Yes. Source code to the macro package component is distributed to clients that participate in the MacPac Development Partnership program.	No.  We'd prefer they license our object models and call the object models. This method enables us to provide much better support for our clients that want to develop their own applications. Our clients find that our products are flexible enough to meet their needs without warranting access to existing code.	No.  We feel this is one of the greatest strengths of our product. Our core engine is consistent across all client installations. This makes for a much lower cost of ownership, because troubleshooting and support do not need to involve the core engine modules, which comprise the predominant portion of the product footprint at any client site. Allowing access to source code would substantially complicate the support and upgrade process, as the product would no longer be shrink-wrapped, but custom to the client in question. Our flexible, object-oriented architecture makes access to the core code unnecessary.	No
11. Is the client able to create	Yes. A dynamic menu system is	Yes.	Yes.	Yes.	Yes. Administrators can use MacPac's	Yes.	Yes. Custom templates	Yes there are no special requirements

<p>custom templates and have them accessible through the macro interface? Comments</p>	<p>supplied to make access to the firm's own templates easy and consistent with the CCC interface.</p>		<p>All customer developed document automation processes are accessible either through KI Systems user interface for common Menus, User Favorites or the Form Bank Organizer.</p>		<p>Template Architect™ to create sophisticated, custom templates without writing code. Alternatively, administrators can manually create their own Word templates, use native Word's wizards, and/or develop standard language or boilerplate files. These can all easily be made available within MacPac's New Document, Attach To, and Insert into Current Document macro dialog boxes.</p>	<p>By calling into our object models, client can create their own templates. The easiest method is to create a new template based on an existing template; however, if a completely new template must be created "from scratch", this would require extensive use of our object model and we would recommend a joint effort.</p>	<p>can be easily added to either the Innova pull-down menu in Word or to Innova's File/New dialog. Innova also provides a template development environment which allows the user to drag &amp; drop bookmarks onto a template on-screen and to then link that template to a specific dialog which they wish to display whenever the template is launched. This can all be done without any need for VBA or any other kind of programming.</p>	<p>to add templates to WordAssist</p>
<p>12. Is the client able to create custom templates and have such templates use features of your product such as address book integration, numbering tools, etc.? Comments</p>	<p>Yes, but only by creating VBA modules that call certain macros provided by CCC.</p>	<p>Yes. We support and highly recommend client-based extension of our tools to suit evolving client needs. Frequently this is done without additional cost to the firm. All tools are designed to have open access, and to integrate with other applications, such as Outlook, Interaction, HotDocs, GhostFill, RightFAX, iManage and DOCS Open.</p>	<p>Yes. Utilizing the SDK the client is able to create custom templates and macros utilizing the same features and functionality as the core KI Systems product. This includes access to SQL Server based Employee Preference data, Office location, Form Bank Organizer, Contacts, VBA form controls and unique dialog processes such as Carry Over.</p>	<p>Yes.</p>	<p>Yes. Our Template Architect™ allows non-coders to create fully functional MacPac-like custom templates. These templates can be created simply by designing bookmarked Word documents and entering data into our database. All major MacPac functionality, including document reusability, author detail, contact integration, letterhead, multi-types, and style standardization is automatically supported by these</p>	<p>If desired, a client can create custom forms which are essentially variations of the letter, memo, fax and pleading templates. These can be integrated with the Forms Assistant, so all the same functionality would be available in these new templates.</p>	<p>Yes. It is possible to integrate custom dialogs &amp; templates with virtually any of the built-in Innova features (i.e., contact manager integration, QuickFill, client/matter lookup). Custom OCXs for these features are available to drag onto any custom dialog, without any need for VBA or any other kind of programming.</p>	<p>Yes. Most WordAssist features are reusable through COM interfaces</p>

					templates. In addition, database driven customization techniques allow administrators to create any number of additional MacPac elements (e.g., additional letterhead, draft stamps, pleadings, notaries, proofs/certificates of service, verifications, labels, envelopes, etc.) without any code.			
13. Is the client able to create custom templates and have them accessible through Word/ WordPerfect's native File-New dialog box? Word 2002's New Document Task Pane?	Yes.	Yes.	Yes.  All customer developed document automation processes are accessible through Word's native File-New dialog box and Word 2002's New Document Task Pane – as well as through KI Systems user interface for common Menus and User Favorites.	Yes.	Yes	Yes.  We stress using Word's native features! Our templates appear in Word's native File-New dialog box and also on Word 2002's New Document Task Pane. The client can also create new documents based on the templates listed in the File New Assistant. It is also easy to add new templates to the File New Assistant.	Yes. This is a built-in feature of Innova.	Yes. WordAssist's templates are accessed through the native MS Word File-New dialog box or Office XP File New pane.
14. The beta for Office 11 is now in circulation...will new technologies in Word 11 impact your product?"	The product will have to be adapted in minor respects to run with Office 11.	Not anticipated at this time (November 2002).	Yes.  KI Systems products are developed to leverage new features and functionality of each Microsoft Office product version. KI Systems is a Microsoft Certified	While Office 11 will certainly allow us to introduce new features and ideas, the basic functionality of our product should not change.	Preliminary test results of MacPac with Office 11 (beta) indicate there will be no issues with compatibility.	Yes.  To date (with the current beta), all our products work in this version. We plan to take advantage of new and improved components of Office 11 and develop additional integration into the products	We do not anticipate any major impact of Office 11 on Innova.	The product will change accordingly

			<p>Partner and participates fully in Microsoft's beta program.</p> <p>With the Office 11 beta, KI Systems is developing its product upgrade, extending and incorporating new features, and is performing full application compatibility testing during the beta cycle. As with the previous 4 beta versions of Office, KI Systems Law Office Automation Tools for Office 11 will be available for purchase and installation on the same day as Office 11 is released.</p>			into the products.		
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**C. PRODUCT SUPPORT AND DOCUMENTATION**

1. Does your company provide phone technical support?	No. We do respond promptly to calls and provide assistance over the phone, as well as via e-mail, but there is no live technical support person to answer calls as they come in.	Toll Free in USA: (888) 4-DAD-LLC	<p>Yes.</p> <p>We provide a variety of technical support services for KI Systems Customers:</p> <p><b>On-Line Resources</b></p> <p><b>Tech Notes</b> - Knowledge base of technical information</p> <p><b>Documentation</b> - User and Administrator</p>	Yes.	Yes. Clients have direct access to their own personal MacPac project manager for all questions and technical assistance. In the future, clients will also have access to a web-based knowledge database that can provide answers to many MacPac-related questions.	Yes	Yes.	Yes
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			<p>Manuals</p> <p><b>Downloads -</b> Service Packs, Updates</p> <p><b>Support Services</b></p> <p><b>Contact Technical Support -</b> Telephone, email and On-line Support Requests</p> <p><b>After-Hours Support -</b> Scheduled access to a Technical Support Engineer, offered 24x7, based on engineer availability.</p>					
2. What hours?	Business hours and limited after-hours support.	8:00 AM to 8:00 PM Eastern Time.	9 – 5 pm Pacific Time and 24 x 7 on a pre-scheduled basis.	24x7	Standard business hours. Via the web-based knowledge database, web support will be available 24 hours a day.	Support is available 7AM-6PM (Pacific).	Telephone support is 9:30am – 5:30am EST. E-mail support is 24 x 7. We are also getting ready to launch a comprehensive SQL-based helpdesk system which will allow us to track and respond to support incidents with greater precision. The database will have a web client whereby our clients & partners can submit and/or	On a needs basis

							track their own support incidents. Additionally, a knowledgebase of legacy support issues will be developed and will also be exposed to the web for full text searches.	
3. What is the guaranteed response time?	Clients always receive a response within 24 hours; typical response time is no more than a few hours.	Varies – minimum 1 hour, maximum 24 hours.	KI Systems is unique - our technical support calls are answered by a real person - NOT an automated answering machine. On your first call you will be provided with an answer or if a code modification/dial-in is required you will be given a time for completion. Generally 50% of all calls are resolved during the first call. We strive for same day or next day code based changes. As with all projects, the scope of the task determines the completion date.	Next business day.	24 hours, though most support calls are handled immediately.	One of the selling points of working with Payne is that we have a good staff of developers, trainers, and support staff on hand to provide this type of support. If you call during our business hours, you get immediate turn around for a response. Email support options are also available.	Our support staff directly answers all calls during regular business hours. If the problem cannot be resolved during the call, it is then escalated to one of the developers who handles the particular type of support issue in question. Responses to e-mail support questions are guaranteed within 24 hours.	24 hours
4. What is the phone technical support pricing structure?	Not applicable.	Varies – minimum no charge, maximum \$175/hour.	FREE for On-line Resources including Knowledge base, documentation and downloads.  FREE for technical support issues requiring less than 15 minutes of technician time.	Phone support for standard macro and template functionality is included in the annual software maintenance contract.	Premium support and product updates are available on an annual subscription basis. The costs of the support program is 20% of the software licensing fee. Firms that purchase one of Legal MacPac's	There is no charge for the first 30 days after the initial purchase/installation of the software. If no maintenance subscription service has been purchased, additional technical support is available after 30 days for	There is no separate charge for support at this time. Support is included with the purchase of the Software Subscription Service (SSS) component of our product. SSS provides for 12 months of automatic	No Charge

			<p>If the technical support call requires installation and configuration of the client's software on a test workstation, dial-in or remote diagnostic procedures we will provide this service on a time and materials basis. We will provide the you with a time estimate to complete the work and obtain your approval prior to commencing the work.</p> <p>We believe in the "FREE" or the "pay as you" go methodolgy for technical support costs. It places you, the customer, in complete control and eliminates the need for expensive yearly maintenance support contracts that may not be utilized or required.</p>		<p>partnerships receive one year of free technical support and product updates as part of the partnership.</p>	<p>\$150 per hour. Most technical questions presented either via email or over the telephone can be answered immediately; however, if additional development work becomes necessary, the turnaround may be longer (we would provide an estimate regarding the development time required along with an estimated completion date).</p>	<p>delivery of product updates &amp; upgrades, as well as general technical support.</p>	
<p>5. Does your company provide end-user documentation? Comments</p>	<p>Yes. A User Guide that explains the use of the system and its components.</p>	<p>Yes. All off-the-shelf products have full documentation. All custom developed product suites have detailed documentation available.</p>	<p>Yes.</p> <p>Extensive On-Line User Help file details each template, macro and Address Book process. Each available options is described in detail enabling the user to quickly locate</p>	<p>Yes. The documentation is available via download in PDF format.</p>	<p>Yes. MacPac documentation is available in electronic format for customization and reproduction by clients.</p>	<p>Yes.</p> <p>A hard copy specification document or administrator guide, plus extensive online help documentation is provided at no charge.</p>	<p>Yes.</p> <p>Extensive documentation is provided in PDF format on CD. Additionally, all documentation is also available in native Word format at no charge upon request.</p>	<p>No. End-user documentation is provided as part of our training services</p>

			information on the particular task. User Help is readily available within the application with a click of the mouse. User Documentation is also available for download from our Web Site on the On-Line Resources page.					
5. Does your company provide administrative documentation? Comments	Yes, an Administrative Guide that explains how the system is configured and how to manage it.	Yes. Installation, bulk application distribution, third-party integration, complete registry and INI documentation (where appropriate), administrative options, etc.	Yes.  Extensive On-Line Administrator Help, hard copy System Administration Manual and hard copy System Specifications. Administrative documentation is also available for download our Web Site from on the On-Line Resources page.	Yes. The documentation is available via download in PDF format.	Yes. MacPac documentation is available in electronic format for customization and reproduction by clients.	Yes.  A specification document or administrator guide is provided.	Yes.  See answer to #5 above.	Yes
<b>D. LICENSING ARRANGEMENTS</b>								

<p>1. How many and which templates are included in the original license?</p>	<p>Numerous templates can be provided, per each client's wishes. Typical templates include Letter, Memo, Fax Cover Sheet, Transmittal, Envelopes, Mailing Labels, Avery Address Labels, File Folder Labels, Bates Numbering Labels, Federal Exhibit Labels, Notary Acknowledgment, a variety of Pleading templates for various state, federal and other jurisdictions, Proof of Service, Verification, Declaration, Pleading Index, Statement of Undisputed Facts, etc.</p>	<p>Legal Macro Library Numbering Suite v2.0 – 9 templates  Legal Macro Library Deluxe Bates Numbering Tool for Word v 2.0 – 1 template  MakePDF for Word v 4.0 – 1 template  Custom Suites – varies 1 to 100+</p>	<p>Common installation includes 35 templates customized to meet your firm's needs:</p> <p>Business Pak (20):  Letter  Personal Letter (executive stationary)  Memo  Fax  Envelope  Personal Envelope  Labels  Mail Merge  Letter (Address Book, Outlook, PAB, Exchange)  Mail Merge Envelope (Address Book, Outlook, PAB, Exchange)  Mail Merge Label - Avery 5164 (Address Book, Outlook, PAB, Exchange)  Mail Merge Label - Avery 5162 (Address Book, Outlook, PAB, Exchange)  Mail Merge</p>	<p>Letter, Memo, Fax, Pleading</p>	<p>MacPac templates and macros include the following:</p> <ul style="list-style-type: none"> <li>• Attach To Macro: Turn Unformatted Text into Styled and Formatted Document Based on a MacPac or Firm Template</li> <li>• Author Lists: Firm-wide Public Author List and User ability to Create Private Authors</li> <li>• Author Template Preferences: Ability to Create and Save Author Preferences for Correspondence Templates (e.g., Letterhead Type, Personal Information to include in Letterhead, Date Format, Closing Phrases for a Letter)</li> <li>• Bates Labels Template</li> <li>• Business Document Template: Business Signature Block(s), Title Page, Exhibits/Schedules</li> <li>• Contact</li> </ul>	<p>The following templates are included in the Forms Assistant: Letter, Memo, Fax Coversheet, Agreement (Agreement Assistant), Pleadings/Briefs (Pleading Assistant), and Envelopes/Labels (Address Assistant) and the File New Assistant.</p> <p>While the Numbering Assistant includes 28 numbering schemes, it is comprised of only one template.</p>	<p>Sample templates for letter, memo, fax cover sheet, multiple pleadings (for several states, courts and jurisdictions), signature blocks, proof of service, verification, and Bates labels are included in the package.</p>	<p>-Pleadings (through the Pleading Builder™)- Letter, Memo-Fax-Blank document-Contract-Bates Labels-Jury Instruction Builder-Envelopes and Labels-Numbering templates</p>
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			<p>Letter Datasource  Mail Merge Envelope Datasource  Mail Merge Label - Avery 5164 Datasource  Mail Merge Label - Avery 5162 Datasource  Diskette Labels  CD Jewel Case Labels  File Folder Labels  Global Add-in template for global macros, reports and access to SQL Server database  Customized Normal.dot to meet firm specifications</p> <p>State Pleading Pak varies by jurisdiction but commonly includes (15):  State Superior Court Pleading format  State Court of Appeals Pleading format  State Court of Appeals Brief format  State Supreme Court Brief</p>		<p>Integration with Firm Database of Names and Addresses:  Ability to format how information is inserted into documents, and ability to use Contact Integration to create Data Source Merge files</p> <ul style="list-style-type: none"> <li>• Delivery/Confidential Phrases Macro for Letters, Memos, Business Documents, Envelopes, Labels</li> <li>• Deposition Summary Template</li> <li>• Draft/Watermark Stamp Macro: Insert Document Stamps</li> <li>• Envelope(s) Macro</li> <li>• Facsimile Cover Sheet Template</li> <li>• Insert into Current Document Macro: Insert Boilerplate Language or Another Template into Current Document (e.g., Insert Notary Form into a</li> </ul>		
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			<p>Court Brief format</p> <p>US District Court Pleading format</p> <p>US Bankruptcy Court Pleading format</p> <p>US Circuit Court - Pleading format</p> <p>US Circuit Court - Brief format</p> <p>US Supreme Court - Brief format</p> <p>Generic Pleading format</p> <p>Bates Label</p> <p>Exhibit Label</p> <p>Deposition Digest</p> <p>Pleading Index</p> <p>Recording Document</p>		<p>Business Document)</p> <ul style="list-style-type: none"> <li>• Interrogatory, Request for Production/Admission Numbered Phrases Macro</li> <li>• Label(s) Macro: Mailing Labels with Firm Name and Address or File Folder Labels</li> <li>• Letter Template</li> <li>• Letterhead Macro: Personal Author Detail for Word-Generated or Engraved Letterhead</li> <li>• Letter Signature Block(s) Macro</li> <li>• Memorandum Template</li> <li>• Notary Template: All Purpose Acknowledgment (Standard or Thumbprint Options), Short Form, Jurat Forms for any State</li> <li>• Paragraph Numbering Schemes Toolbar for Automatic Numbered Paragraphs and Tables of Contents. Administrative and User ability to Edit, Save, Share Schemes</li> </ul>		
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					<ul style="list-style-type: none"><li>• Pleading Template: State, Federal, Appellate Courts for any State</li><li>• Pleading Signature Block(s) Macro</li><li>• Pleading Paper Macro</li><li>• Pleading Counsel/Co-Counsel Macro</li><li>• Pleading Captions/Cross-Actions Macro</li><li>• Pleading Table of Authorities Macro</li><li>• Proof/Certificate of Service Template (includes Service List Macro): Multi-Purpose, Courier, Facsimile, Mail, Overnight, Personal Forms for any State</li><li>• Reuse Macro – An Existing Document Created with a MacPac Template can be used as a Master Document to Quickly Recycle Document Information for a New Document</li><li>• Table of Contents</li></ul>			
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					<p>Macro</p> <ul style="list-style-type: none"> <li>• Trailer Macro: Insert Filename into Document (includes Integration with most Document Management Systems)</li> <li>• Verification Forms Template: Attorney, Corporation, Executor of a Will, Individual Forms for any State</li> <li>• MacPac provides instant access to the following symbols: • ¨ ¢ ☒ □ © — Δ ° € ½ ¼ ¶ π £ © § SM ™ ¥</li> </ul>			
2. Are templates customized by you to client specifications included in the original licensing fees? Comments	Yes.  A fixed fee is quoted to each client based on the client's particular needs and preferences.	Yes.	Yes.  KI Systems is unique in that we believe the software you receive should be "You" out of the box. We utilize a series of Workbooks to gather customer specifications prior to the build of your	No, additional customization is billed at an hourly rate.	No.  Customization costs are in addition to software licensing fees.	No.  The Numbering Assistant, Agreement Assistant, Metadata Assistant, File New Assistant, and Address Assistant can be purchased as-is. All other templates (e.g., letter, memo, fax, pleadings) require	No.  Our Partner Channel offers on-site installation, customization and training services.	No,  All customization is handled by our consulting services

			<p>software. The Workbooks provide the necessary information to develop the software to your specifications before delivery.</p> <p>All customization, formatting, layouts, logo design and firm preferences are included in the software purchase price.</p> <p>Additional templates or macro processes that are not included with the core system can be provided on an hourly basis.</p>			pleading) require some level of customization.		
3. How do you handle minor changes to templates after rollout (i.e. is there an additional charge or is it included in the original licensing fees)?	The original fee includes minor changes requested during and shortly after a rollout. Any major changes in the specifications provided by the client may result in a charge.	All implementations are designed to support ad hoc customization of templates or addition of new templates, either by us or the client. Additional fees are determined on a case-by-case basis.	<p>Generally no charge.</p> <p>KI Systems customizes the software based on Workbook specifications completed by the customer. If the minor change was specified in the Workbook but not included in the software delivered to the customer – no fee would be charged. If, however, the minor change is a new request for development (i.e. not included in the Workbook) additional fees may apply.</p>	Clients have the ability to make many changes to the templates. If additional assistance is required, this is billed at an hourly rate.	Changes to the templates and macros will be made by Legal MacPac at no additional costs if these changes fall within the original scope of the project. Enhancements are performed at our standard hourly rate.	Fixes are available at no charge. Feature creep (i.e., adding new features/functionality after the original spec sheet has been agreed upon and the project started) is charged by the hour (\$150/hr).	Customizations changes after rollout are typically simple enough to be handled directly by the client.	Additional charge

<p>4. Does the original licensing cost include on-site installation and training? Comments</p>	<p>Installation is included. Training is provided independently.</p>	<p>Installation and Training is included in implementations on a time-and-materials basis.</p>	<p>Yes.  For customers purchasing the Enterprise Address Book for SQL Server we provide FREE on-site technical support and systems administrator training.  For customers purchasing the Standard Address Book version based on MSDE we provide free telephone technical support for installation, configuration and systems administrator training.</p>	<p>No.</p>	<p>No. Installation and training costs are additional.</p>	<p>No.  All automation tools can be installed via a customized Wise Install (EXE) or MSI file. If a client prefers, templates may also be distributed "piecemeal" by incorporating them into a login script.</p>	<p>No. See answer #2 above.</p>	<p>No. installation and training are handled separately</p>
<p>5. What length of time is projected for a project installation?</p>	<p>Systems typically can be installed within 6 to 8 weeks after work commences. This varies considerably based on the client's rollout schedule.</p>	<p>Varies, average 40 – 120 hours.</p>	<p>4 – 5 Weeks. This projected timeline includes: 1 wk – Customer completes Workbook(s) with the firm's unique specifications 1- 2 wks – KI Systems creates Customer software based on Workbook specifications 1 wk – KI Systems performs manual and automated application testing 1 wk – KI Systems documents customer software, creates manuals, server installation program</p>	<p>It will depend on the customization desired by the client.</p>	<p>Most projects are scheduled 4-6 weeks before an on-site installation. This provides Legal MacPac and the client time to determine the details of the scope of work along with all technical specifications for the project. After customization is completed by our programmers, all projects are rigorously tested and reviewed by the project manager and tester prior to the installation.</p>	<p>From the moment that the spec. document is complete and agreed upon, the turn around for the project is 4 to 5 weeks. Installation is as easy as double-clicking a file.</p>	<p>Time to deployment varies in accordance with the complexity of the customization needs of the specific project at hand.</p>	<p>Two weeks for a generic WordAssist installation, including customization.</p>

			and client installation program.		Our on-site installation is two days. The first day includes product installation, testing, and minor modifications, if necessary. In addition, we provide a document review process and a 3 hour administrative training session. The second day is devoted to a 6 hour train-the-trainer training and wrap up session.			
6. How many hours of training are included?	Only administrative training is included. End-user training can be quoted separately and typically is provided as part of a broader training, when firms are converting from WordPerfect to Word or upgrading from one version of Word to another.	Varies.	<p>For Standard version of Address Book (MSDE): 4 hours telephone technical support and system administrator training included.</p> <p>For SQL Server version of Enterprise Address Book: 4 hours on-site database installation and data port; 4 hours of systems administrator training that includes: Workstation setup and configuration, database administration, backup and tips and tricks.</p> <p>No end user training is provided. We will assist you to locate a</p>	N/A	On-site installations include 6 hours of train-the-trainer training and 3 hours of basic administrative training. Legal MacPac Administrative and Development Partners receive three to five days of on-site training in the modification and development of MacPac, including the creation of custom templates. Additional training can be provided upon request and is billed on an hourly or daily rate.	When training is requested, we work with the client to determine the number of training hours necessary. The number of hours is determined by which macro packages are purchased, and whether the training also includes other types of training (e.g., Word end user training, etc.).	N/A	No training hours are included. Training is handled separately

			<p>trainer familiar with our products and/or provide you with "train the trainer" assistance on a time and materials basis.</p>					
<p>7. What follow-up on-site and off-site technical support is included in the original licensing costs?</p>	<p>Any bugs or errors in the programming are corrected, and minor changes to the system are made, without additional charge for a period of 90 days after training commences (this period is negotiable). Such changes are made either on-site or remotely, depending upon the nature of the problem.</p>	<p>Telephone and remote web support included.</p>	<p>FREE for On-line Resources including Knowledge base, documentation and downloads.</p> <p>FREE for technical support issues requiring less than 15 minutes of technician time.</p> <p>If the technical support call requires installation and configuration of the client's software on a test workstation, dial-in or remote diagnostic procedures we will provide this service on a time and materials basis. We will provide the you with a time estimate to complete the work and obtain your approval prior to commencing the work.</p> <p>We believe in the "FREE" or the "pay as you" go methodology for technical support costs. It places you, the customer, in complete control and</p>	<p>Off-site phone support for standard macro and template functionality is included in the annual software maintenance contract. On-site technical support is determined on an individual case basis.</p>	<p>All technical support (both on-site and remote) is provided directly by MacPac personnel. Each client is assigned a dedicated MacPac project manager and programmer who will work closely with the firm to resolve any technical or training issues, answer questions, and send updated files electronically when necessary. Email and telephone technical support as well as product updates are available for 90 days following installation at no charge. Premium support and product updates are available on an annual subscription basis. MacPac Administrative and Development partners receive email and telephone technical support as well as product updates for one year following installation as part of their partnership program. The need for on-site</p>	<p>Off-site technical support for the first 30 days after purchase of the software is included in the original licensing costs.</p>	<p>Technical support is provided to all clients participating in our Software Subscription Service (SSS).</p>	<p>Technical support is on a needs basis and is not included with the licensing cost</p>

			eliminates the need for expensive yearly maintenance support contracts that may not be required.		technical support is rare.			
8. Does your company provide product updates such as code enhancements? Comments	From time to time, but not on a scheduled basis. Typically, these are major enhancements to certain features, or new features, and there often is a nominal charge for such updates.	Yes. News of enhancements or updates available in our monthly HTML Newsletter, or on our web site.	Yes.  Our from our web site customer can access the FREE On-Line Resources to Download version specific Service Packs and Updates.	Yes.	Yes. Legal MacPac releases updates to its core components approximately four times a year.	Yes.	Yes. Service packs (minor releases) are regularly released in between product upgrades (major releases). They are automatically shipped via CD or e-mail to all clients participating in our Software Subscription Service (SSS).	Yes
9. If your company provides code enhancements, can they be installed by the client? Comments	Code enhancements almost always are installed by Crowther Consulting, via a remote connection, or on-site.	Yes. See #3 above.	Yes.  We provide both Client and Server Setup programs to install our products and any code enhancements, service packs or updates. Setup programs are designed to be installed by the customer.	Yes.	Yes. Updates and enhancements are sent electronically and are distributed to users by the firm.	Yes.	Yes. Product upgrades are provided on CD and can be easily installed by the client, with little or no effect on their site-specific customizations.	Yes
10. If your company provides code enhancements, are they designed in such a way as to work with the base customized templates of the client? Comments	Yes, always. If the enhancement requires customization to work with the client's system, Crowther Consulting always is careful to perform such customization.	Yes.	Yes.  Code enhancements do not remove base functionality rather they architected to extend core functionality and provide additional features. Base functionality will remain intact.	Yes.	Yes. Customized versions of the product are compatible with all product updates, including code enhancements.	Yes.	Yes. See answer #9 above.	Yes
11. What is the	The structure and	No charge for clients	FREE for generic	An annual	Updated files are	If we add a new,	All product updates	Until end of 2002

<p>structure of product updates distribution and cost?</p>	<p>cost varies based upon the nature of the enhancement. Such updates or enhancements always are optional, and seldom very costly.</p>	<p>with support contracts.</p>	<p>installations of SQL Server (or MSDE). This includes DLL and EXE fixes/patches.</p> <p>Time and materials based fee for customized database sites.</p>	<p>maintenance fee equivalent to 20% of the cost of the package is charged. This fee will cover technical support for the standard products and free upgrades when available. Updates are typically available via download from our web site. Notifications of updates are sent via e-mail to registered users.</p>	<p>sent electronically. Updates can be distributed without overriding user's personal settings. Premium support and product updates are available on an annual subscription basis. The costs of the support program is 20% of the original software licensing fee. Firms that purchase one of Legal MacPac's partnerships get one year of free technical support and updates to the product.</p>	<p>useful feature, often there is no charge and we send it out immediately. For version upgrades, the cost is the differences between the client's original purchase price of the software, the price of the updated product times the number of workstation licenses, plus customizations. This can be much less expensive than a maintenance contract. An annual subscription service is available for the Metadata Assistant, which includes support, maintenance, upgrades, fixes, most customizations, and more. An annual subscription service is also available for the Forms Assistant and the Numbering Assistant. The subscription service is critical for the Metadata Assistant because, as new metadata is discovered, an updated product needs to be released to all clients as soon as possible to prevent accidental dissemination of confidential information outside</p>	<p>(service packs) and upgrades (new releases) are included in the Software Subscription Service (SSS). Participating clients are shipped a new CD automatically, upon official release of the product update/upgrade, for a period of 12 months.</p>	<p>yearly licensing fees are \$25 a user.</p>
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						the firm. The annual maintenance service for the Forms Assistant and Numbering Assistant includes support, maintenance and fixes; however, it does not include requests for new development and customizations, which are billed at our normal hourly rate.		
12. What is the licensing pricing structure of your product?	Since the fixed fee is all-inclusive, it varies considerably from one system to another, based upon its contents and the degree of customization.	Custom packages not licensed by user, but by implementation time only. Modular products licensed by user.	Product licensing is structured on a per Server Site License and Workstation Desktop Access License fee.	It is a per-seat cost, based on the total number of seats. Also, as noted, there is an annual maintenance fee.	Licensing costs are based on the number of users. Firms purchase licenses for a range of users and can expand within that range without incurring additional charges. Firms may also install MacPac on laptops and home computers at no additional cost.	Forms Assistant: \$50 per workstation license Numbering Assistant (quantity discounts apply): 1-24: \$65 per workstation 25-99: \$55 per workstation 100-249: \$45 per workstation 250-500: \$39 per workstation 500+ Workstations: \$30 per workstation  Metadata Assistant:  Retail License: \$79 per workstation license  Enterprise License: 1-100 workstations: \$5,000 101-1000 workstations: \$10,000 1001-2000	The per-seat licensing cost is based on the total number of workstations on which the product will be installed. Please call for further details.	Currently \$105 a user

						workstations: \$11,800 2001-3000 workstations: \$13,500 For more workstations, contact Payne.		
1. With which email programs does your product integrate?	E-Mail integration is not an issue in this system, except that the system may use Contact information from Outlook and other sources also used for e-mail addressing.	Outlook, GroupWise, Lotus Notes, any MAPI-compliant.	Outlook, Groupwise and any MAPI Compliant email product.	Exchange/Outlook, Lotus Notes, GroupWise.	Microsoft Outlook, Outlook Express, Lotus Notes, GroupWise, and Microsoft Messaging.	Forms Assistant: Outlook, GroupWise (Address Book), including InterAction.  Metadata Assistant: Outlook 2000 and higher; GroupWise 6.0 and higher; Lotus Notes.	GroupWise, Lotus Notes and Outlook, as well as InterAction and ContactEase contact management products.	Microsoft Outlook
2. Can a document be created with information from Microsoft Outlook's personal contacts? Comments	Yes. Users may select Outlook contacts from within the macro dialog boxes in Word, or they can select contacts in Outlook and launch new documents directly from Outlook, instead.	Yes. We have unique tools for pulling any contact information from other users' shared contacts folders where the owner has given rights to the other user. These work transparently with built-in Word functionality, our templates or client-developed templates.	Yes.  All document production process are engineered to provide access to contact information using either the Enterprise Address Book or Microsoft Outlook's personal contacts.	Yes.	Yes. Letters, Memos, Faxes, Service Lists (for Pleadings and Proofs/Certificates of Service), Envelopes, and Labels are integrated with Outlook. Custom templates built with the MacPac Template Architect™ support contact integration.	Yes.	Yes. Integrations are built into the letter, memo and fax cover sheet modules (To, From, CC and BCC fields). Using our Insert Address module, the user can also select multiple contacts to create batches of envelopes, labels or a merge data file, without the need to step through the native Word merge process.	Yes. Through our unique Microsoft Outlook integration, users can create documents, including mail merge files, from any combination of their own personal contacts, anyone else's personal contacts or public folders
3. Can a document be created with information from Microsoft Outlook's public contacts? Comments	Yes, from any contacts-type folder in Outlook to which the user has access, whether public or private.	Yes.	Yes.  Public contacts are synchronized to the Enterprise Address Book.	Yes.	Yes. Legal MacPac's Contact Integration™ product reads and writes directly to the Exchange Server, and therefore supports all functionality that is supported for personal Outlook	Yes, as well as Contact folders in Favorites.	Yes. Any folder (public, private or shared) to which the user has access rights can be accessed through Innova's contact manager integrations.	Yes

					contacts.			
4. Is there a limitation to the number of contacts that can be inserted into a letter/memo/fax? Comments	No.	No.	No.	No.	No.	No.	No.	No
5. Can a mail merge file be created from personal contacts? Comments	Yes, by using Word's mail merge feature. This is not a feature of the CCC Macro System.	Currently not supported, but could be easily implemented.	Yes.  KI Systems is unique in that it provides 8 different Mail Merge templates customized to the firm's specifications. These mail merge templates eliminate the tedious process of creating mail merge documents from scratch – particularly in the Office XP environment.  We provide 4 mail merge templates designed to be used with data source documents such as those created from personal contacts.	No.	Yes. Legal MacPac's Contact Integration™ product can create a Word data source file from any contact data source in which a user has access rights.	Yes.  Clients using our products can use conventional mail merge through native Word and Outlook.  Our Address Assistant offers an appealing alternative to mail merge. Any number of contacts (from personal contacts or public contact folders) can be retrieved directly into a document, envelope, or labels without having to set up a mail merge document. In addition, users may highlight one or more addresses in a Word document and instantly create envelopes or labels using the Address Assistant.	Yes.  Using our Insert Address module, the user can bypass stepping through Word's native mail merge processes entirely. They can either choose to have the merge data file created for them, or choose to bypass the merge process entirely and directly insert formatted address information into a document on screen.	Yes. Through our unique Microsoft Outlook integration, users can create documents, including mail merger files, from any combination of their own personal contacts, anyone else's contacts or public folders
6. Can a mail merge file be created from public contacts? Comments	Yes, by using Word's mail merge feature. This is not a feature of the CCC Macro System.	Same.	Yes.  Public contacts are synchronized to the Enterprise Address Book and KI Systems Mail Merge templates automatically	No.	Yes. Legal MacPac's Contact Integration™ product can create a Word data source file from any contact data source in which a user has access rights.	Yes.	Yes. See answer to #5 above.	Yes

			<p>perform the mail merge task.</p> <p>These mail merge templates eliminate the tedious process of creating mail merge document from scratch – particularly in the Office XP environment.</p>					
7. With which document management programs does your product integrate?	iManage, Docs Open (Hummingbird), Worldox, WANDocs	iManage, DOCS Open, WorldDox	iManage: infoRite 5.x; DeskSite/MailSite Hummingbird: Docs Open 3.8.x; 3.9.x; PowerDocs; DM5 Worldox 8.0; 2000 Microsoft Sharepoint	DOCS Open and PowerDOCS, iManage, Worldox.	MacPac integrates with most document management programs, including PCDOCS Open, PowerDOCS, DOCSFusion, iManage, NetDocuments, Worldox, and Prolaw.	Hummingbird, iManage, Worldox, and Lotus Notes.	DOCS Open/PowerDOCS, DM5, iManage and WORLDDOX.	iManage DOCS Open, WorlDOX
8. Is the integration with document management programs seamless out of the box, or does it require customization to client specification?	It requires customization to the client's specification, as clients customize their document profiles and have different needs and preferences concerning the manner in which the macros interact with the DMS.	Seamless COM Integration for iManage, ODMA/DLL integration for other DMS systems. While customization not required, most clients request minor customization to suit firm standards.	The integration module is seamless out of the box. However, it can be customized to meet unique customer specifications.	Standard integration includes a footer macro and integration with RightFAX or LegalFax, if the client has those products. Additional functionality can be added if desired.	Document management integration is seamless out of the box. Additional customization to firm specification is available through administrative features of the application.	For our Document ID macro (included in the Forms Assistant), typically some customization is needed in order to meet the specific needs of the client. For example, we are often asked to add custom macros to search for and replace a "legacy" DocID with a new DocID when users save their documents to their new document management system. Without any customizations, a "default" document ID can be stamped in the footer of	DMS integration is completely shrink-wrapped out of the box. Minor customization is only needed to determine the specific contents and format of the Doc ID (i.e., library name, doc #, ver #, other profile fields, left-aligned, right-aligned).	The integration is seamless out of the box and can be customized by the client if desired

						<p>documents whenever the documents are saved.</p> <p>Our pleadings can be integrated with the client's document management system in order to store pleading captions centrally in a "caption bank," either using the document management system or the network file structure.</p> <p>When working with a document management system, we are able to populate the document type profile field based upon the template used to create the document. The document type field also populates other fields, streamlining the profile completion process.</p>		
9. With which contact management programs does your product integrate?	Outlook, Info Accelerator, Office Accelerator, Time Matters, Amicus	Interaction.	Enterprise Address Book Microsoft Outlook InterAction via MAPI Connector Any MAPI Compliant Address Book Service Provider	Outlook, Lotus Notes, METZPhones / ContactEase, Prolaw, InterAction.	MacPac integrates with most contact databases, including Outlook, InterAction, Lotus Notes, Prolaw, GroupWise, ContactEase/MetzPhones, Handshake, and Time & Chaos. In addition, MacPac Contact Integration™ can support integration with any ODBC/OLEDB-compliant or MAPI-	Outlook (Contacts) GroupWise (Address Book) InterAction ProLaw Metzphones Payne Outlook Relationship Assistant Custom – we can integrate with any MAPI-compliant data source.	ContactEase, GroupWise, InterAction, Lotus Notes and Outlook.	InterAction Outlook Any SQL based contact manager

					compliant contact management program.			
<b>F. NETWORK INTEGRATION</b>								
1. How is network integration resolved when your product is used on a laptop both off and online?	User-specific settings must be stored locally or copied locally when user's connect and/or disconnect from the network. This typically is arranged with the client's technical staff.	Automatic detection of connection with fail-over capabilities.	<p>KI Systems Law Office Automation Tools are designed for network use and connectivity to the SQL Server Address Book database.</p> <p>For an online laptop user, the full functionality of the product is automatically available.</p> <p>For an offline laptop, we offer a Remote Version that allows the user to take their Enterprise Address Book database contacts and all system functionality on the road.</p> <p>The Remote Version provides bi-directional synchronization of contact data. This enables the user to synchronize contact information that is entered on the road back to the Enterprise Address Book database when they return to the office.</p>	Offline use is built in to the product. It is expected that our users will be offline at times, and all features are designed to work as normal.	Since Legal MacPac can be run locally, it can be used with and without the network. There is no loss of functionality when the laptop (or desktop) is disconnected from the network.	As long as the document templates are stored on the local computer, network database files can be copied down to the local computer and available when working offline.	Laptop mobility is built into the product. Innova allows for automatic replication of data between the network master database (SQL) and the local workstation (MSDE). This process can be automatically scripted by the administrator or can be initiated by the user. Users, therefore, have access to 100% of the product functionality, including their personal customizations, whether they are on- or off-line.	WordAssist has built-in on and offline support specifically for laptop users. Through our "Smart Connect" feature, WordAssist knows if the user is on or offline. WordAssist also deals with server-down situations
2. What issues need to be addressed to use	Since the product runs locally to begin with, almost none.	None. Installation is identical. Client data files (if used)	<p>None.</p> <p>The Remote version</p>	The ezTemplate files must be installed locally, which is the	There are no special issues. MacPac treats offline	Very few issues need to be addressed for offline use. The	Nothing needs to be done. The switch between online and	None

<p>your product offline on a laptop?</p>	<p>The only exception is the location of user-specific settings that may roam on the network and must be copied or mirrored on the local drive.</p>	<p>automatically updated when remote users reconnect to network.</p>	<p>provides all necessary product functionality.</p>	<p>recommended configuration. In addition, integration with third-party products requires that the third-party product itself be configured for offline use.</p>	<p>machines the same as on-line machines.</p>	<p>templates are typically run locally, so a laptop user would launch and run the templates just as they normally would while online.</p> <p>In the case of pulling recipient information from a contact manager, such as Outlook, the user can use an offline data store (in other words, regularly synchronizing their Outlook folders for offline use).</p> <p>Other data sources, such as the optional author information database, can be stored locally in addition to a server-based data source. The IS department may refresh this data to user's local machines on a regular basis with a login script.</p> <p>In the case of document management systems, the DocID macro can stamp the local file name/path in the footer if the document management system is unavailable. The user can then import the document into the document management system</p>	<p>offline modes for a laptop is done seamlessly and automatically to the user.</p>	
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						later, if desired. [NOTE: Our macro packages can also be used over a terminal services client.]		
<b>G. FEATURES</b>								
1. Is automatic paragraph number customizable: At the Network Level	Yes.	Yes.	Yes.	Yes.	Yes. Administrators can create and customize firm-wide Public Numbering Schemes for standardized paragraph numbering.	Yes.	Yes.	Yes
Is automatic paragraph number customizable: At the End-User Level	Yes.	If desired.	Yes.	Yes.	Yes. Users can create, customize and save their own Private Numbering Schemes for automatic paragraph numbering styles they use on an on-going basis.	Yes.	Yes.	Yes
2. Can number style (1,2,3...;a,b,c...) be customized: At the Network Level	Yes.	Yes.	Yes.	Yes.	Yes.	Yes.	Yes.	Yes
Can number style (1,2,3...;a,b,c...) be customized: At the End-User Level	Yes.	Yes.	Yes.	Yes.	Yes.	Yes.	Yes.	Yes
3. Please define the structure of your pleading template.	Text box and vertical graphics lines within the header.	Pleading paper macro provides many different configurations.	The pleading template is a combination of default text, styles, header/footer text and VBA wizard. The wizard provides court specific prompts and options:	The pleading template is customized to the needs of the firm.	Pleading specifications are stored in a Microsoft Access database. Pleading text and formatting is stored in Word files. Pleading-specific macros are available from the Pleading	The fully automated pleading template consists of any number of available captions, line numbering options, caption types, and signature blocks.  When users create	The pleading module is template based. All common styles and formatting particulars are built into each template. However, a GUI front-end is provided via the Dialog Designer module to manage	The Pleading Builder produces native MS Word templates that are fully automated

			<ul style="list-style-type: none"> <li>• Multiple Third Party or Cross-Complainant captions</li> <li>• Optional Hearing, Judge, Trial Date, Complaint Filed information</li> <li>• Multiple Signature Block format options</li> <li>• Database retrieval of Signer's Preference Name and Bar number</li> <li>• Database retrieval of Office location, address and/or logo information</li> <li>• Option to Save caption as a Caption Bank Document to speed creation of future pleadings</li> </ul>		<p>menu.</p>	<p>new pleadings documents, they are given the choice of inserting a "default" click-and-type caption, an existing caption from the caption bank, or a new caption that they create on the fly and add to the Caption Bank. They are then able to insert the pleading title and a signature block containing attorney names and bar numbers. While the Pleading Assistant makes it easy to create new pleadings and setup new captions, the greatest benefit is accessing existing captions from the Caption Bank. Once a caption has been created and saved to the Caption Bank, anyone else creating a pleading or brief for that same case can use that same caption, thereby ensuring that all captions for the same case look exactly the same, which is a court requirement in some jurisdictions.</p> <p>After generating a pleading document, the user can go to the accompanying</p>	<p>the links from multiple dialogs (geared to specific state/county/court combinations) to these templates. The caption area can not only be built as a part of the creation of the initial pleading document, but can also be easily added to an existing document which might contain just the text of the pleading.</p> <p>Pleading paper utilities allow the user to easily manipulate the pleading document after it has been created. Making adjustments to the line numbering format, sidebar, short title and other aspects of the pleading can be done through a simple, single dialog, thereby shortcutting literally dozens of manual steps in native Word.</p>	
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						<p>Pleading menu to perform any of the following tasks: (1) Insert a caption into an existing document, (2) Edit the pleading title and/or footer, (3) Edit the information contained within the signature block, (4) Insert Cross Actions, (5) Change originating office address, (6) Toggle the date from a field to text or vice versa, (7) Insert or modify line numbering, (8) Adjust caption borders, and (9) Insert Proof or Certificate of Service.</p>		
<p>a) Does it use a database to store court rules? Comments</p>	<p>A database is used to store certain elements of pleadings, such as counties, districts, party titles and other elements that vary and may change from time to time.</p>	No.	No.	No.	<p>Yes. Legal MacPac's use of Word files to store text, formatting, and styles has two major benefits: (1) firms can implement new court rules quickly without having to wait for updates to our application; (2) pleading creation takes significantly less time, since most of the pleading is already built by the time the user completes the dialog box.</p>	<p>No. We encourage standardization, but have found that clients often have varying standards regarding how they want their pleadings to appear from court to court, within the bounds of the court guidelines. Pleading templates are carefully set up using styles according to our clients' specifications and preferences.</p>	<p>Yes. The data is stored in the database. The formatting attributes are stored in the court-specific template.</p>	No
<p>b) Does it use a separate template for each one? Comments</p>	<p>A single macro handles building all types of pleading captions, but the</p>	No.	<p>Yes. KI Systems provides individual templates</p>	<p>This will depend on the needs of the firm.</p>	<p>No. All pleadings, including foreign pleadings or briefs, are generated by a</p>	<p>It depends from which states and courts the pleadings are set up. In some</p>	<p>Yes.</p>	<p>Yes</p>

	dialog boxes that prompt for information – and the templates that are used - vary depending upon the jurisdiction.		for common State and Federal court templates. This is done to ease modification and maintenance of styles, numbering, firm preferences, and court requirements.		single template.	situations, where the client has a “universal” look and feel to most of their pleadings, a single template may be used.  For clients that prepare a variety of pleadings across the board (e.g., for courts in New York, Massachusetts, and California), the formatting and layout may be different enough to warrant a separate pleading template for each state.		
c) Does it use auto text? Comments	No.	No.	No.  However, based on unique customer specifications auto text may be utilized.	No.	No. MacPac uses Word files to store text, formatting, and styles.	The captions, signature blocks, and other components of a pleading are typically build into the pleading template(s) as AutoText entries.	Use of auto text is optional.	Yes
d) Do you supply the court rules? Comments	Yes.	N/A	No.  Bi-annually, KI Systems reviews the State and Federal level court rule requirements and updates our product components. Customer notifications of rule changes are commonly sent. Based on the change, customers may elect to personally modify their templates to	No.	No. MacPac’s uncustomized package reflects the court rules as defined by our more than 500 clients over thirteen years. However, we depend upon all clients to verify these rules for themselves.	Although we can provide court rules to clients, if requested, our clients are usually the ones that give us the guidelines on how they want <i>their</i> pleadings to be set up, including formatting and page layout specifics. This again reflects the individual differences that we have found to be the case from client to client, even working in the same	No. As court rule changes come to light, the pleading administrator can easily incorporate those changes into current layouts without the need for any programming. We feel it is best for our clients to make these changes themselves, as there are many areas where a rule is hard and fast, while in other areas the rule	No

			meet the rule or may request that KI Systems perform the update.			locale.	or setup may be more one of personal or corporate preference.	
e) If you supply court rules, do you have court packages per region (i.e., a Southern California Pleading Pack)? Comments	No. The pleading system is largely designed for California state and federal courts, though many other state venues have been provided to clients when needed.	N/A	KI Systems' California Pleading Pak provides region specific features for California Courts.	No.	Legal MacPac includes approximately 60 pleadings for courts across 15 U.S. states as well as pleadings for the United Kingdom. Additional courts can be added by MacPac or by the client through use of administrative features.	We have a "baseline" set of pleadings that reflect the court guidelines of many states, including California, Massachusetts, New York, Oregon, Kansas, Pennsylvania, Virginia/DC, New Jersey, Alabama, Georgia, Utah, Alaska, and Washington. Other pleadings, such as those used on the municipal and federal level, are available and can be customized based on our clients' needs.	N/A	N/A
f) If you supply court rules, do you send out regular updates? Comments	If rules affecting the templates in this system change, Crowther Consulting offers to update the client's templates accordingly.	N/A	If KI Systems becomes aware a court rule has or is changing, we provide this information in our e-Newsletter and send out email notifications to our customers regarding the change. Our notification commonly instructs customers on how to make the change internally or requests them to contact us if they would like us to perform the update for them.	No.	The client is responsible for ensuring that pleadings are acceptable to the respective courts. Upon request, we can supply updated state and/or court pleading boilerplate Word files and MacPac database information.	N/A	N/A	N/A
4. Does your product use the	It can, but most clients thus far prefer	No, for compatibility reasons. We solve	Yes.	ezNumbering supports the use of	No, not at this time. We expect to utilize	Yes.	No.	Yes

product use the Word 2002's new Style Separator?	clients thus far prefer to use the Hidden Paragraph mark, due to its familiarity, and for compatibility reasons.	reasons. We solve this problem a different way.	Our Office XP products are written specifically for that version and leverage the full features and functionality of that program.	supports the use of the Style Separator. Users can choose to use it or not, as desired, without impacting the performance of ezNumbering.	We expect to utilize this feature in a future release of MacPac.	Version 3.0 of the Numbering Assistant incorporates the Style Separator. The Numbering Assistant also includes a new tool that can be run on documents created in earlier versions of Word to replace hidden paragraph marks with Style Separators. A separate feature, also in the Numbering Assistant, allows Style Separators to be inserted in multiple paragraphs throughout a document using a single command.		
5. Does your product utilize Word 2002's Smart Tag feature? If so, please explain.	No, though Smart Tags can be customized when appropriate.	No.	Yes.  Smart Tag may be turned on within the Office XP products and will function as the default Microsoft implementation of that feature.	No.	No, not at this time. We expect to utilize this feature in a future release of MacPac.	Yes.  The Metadata Assistant includes the option to analyze and remove Smart Tags. Also, we can develop custom Smart Tags for our clients who request this feature.	No.	No
<b>H. PLEASE LIST 3 OUTSTANDING FEATURES UNIQUE TO YOUR PRODUCT:</b>								
1.	Crowther Consulting dedicates more time and effort than any of its competitors to adapting and tailoring its system to the particular needs and preferences of each client. Each	Word documents created with our numbering tools are portable and can be edited by users without our package without any problems. We do not include features that	Established in 1994, KI Systems, a Microsoft Certified Partner and industry leader, provides the most comprehensive Legal Macro Add-in Package for Microsoft Office. Our	Each item within the ezTemplate package provides a simple, single screen interface. Most users can begin using the product immediately, with little training	<b>Remodel and Rebuild Documents:</b> All macro packages provide macros that create documents. MacPac is the only macro package that provides tools to	<b>Extremely flexible and powerful userforms (dialog boxes) enhance the usability of the product.</b> Our product provides users with the ability to "round trip" or	<b>Development Platform.</b> The all-new Dialog Designer is a full-scale development platform for Word, the first of its kind in a macro/template product. The	MS Word documents can be converted to PDF on the fly as part of MetaSweeper the MS Word metadata remover

	<p>system is customized as much as necessary to suit each client's practice.</p>	<p>require our code to make the documents editable.</p>	<p>“Law Office Automation Tools” are designed as Enterprise products and customized to meet the unique needs of your firm.</p> <p><b>FOR USERS,</b> our tools allow you to implement firm-wide standards for "look and feel." Alleviate your staff from the tedious tasks of repetitive document formatting and layout. Our tools allow your users to focus on the creative process of text authoring - not document configuration.</p> <p><b>FOR ADMINISTRATORS,</b> our tools streamline the distribution and maintenance of desktops. Our products utilize true client-server database architecture. The beauty of this structure is clear:</p> <ul style="list-style-type: none"> <li>• No desktop updates required for Office information changes (i.e. suite, address,</li> </ul>	<p>required.</p>	<p>assemble, remodel, reuse, and salvage valuable documents and text easily and endlessly. In seconds, users can turn plain text into complex documents formatted to firm standards, create new documents from old ones without re-entering information in dialog boxes, and insert entire documents, such as notary forms and proofs/certificates of service, into existing documents.</p> <p>Three major macros ensure that firm work product is built and re-built quickly and efficiently:</p> <p>(a) <i>Attach To macro:</i> Plain text, even non-structured documents can be attached automatically to a MacPac template and formatted on-the-fly for a particular document or court. This means newly converted documents, text from email messages, even documents based on normal can quickly become standardized, firm-styled documents</p>	<p>redisplay the userforms, and the ability to switch between a multi-tab userform and a single “large” userform format. We also have amazing, built-in multi-language capabilities!</p>	<p>Administrator can easily create any kind of dialog and related template without the need for traditional programming. Full access to resizing and repositioning of all standard VB controls on the dialog is allowed, as well as manipulation of all control properties – all built in and in a GUI interface. Custom controls are provided so that the Administrator can create custom dialogs with contact management integrations, QuickFill or a client/matter lookup just like in Innova’s standard shipping letter, memo &amp; fax dialogs. In fact, the Administrator can modify any control on any standard Innova shipping dialog – no programming needed. Additional utilities are provided for developing custom templates (drag &amp; drop bookmarks onto the template on screen, link the template to a dialog) – all this without having to write a single line of code.</p>	
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			<p>phone numbers)</p> <ul style="list-style-type: none"> <li>• No desktop updates required for adding new Office sites</li> <li>• No desktop updates required for changing your Office Letterhead or Firm Logos</li> <li>• No desktop updates required when maintaining active Employee information</li> <li>• No desktop updates required to add or modify system settings and user preference options</li> <li>• We simply provide you with “<b>Near-Zero Administration</b>”</li> </ul>		<p>that can include letterhead, pleading paper, unique footers or headers, author information, and default preferences, etc.</p> <p>(b) <i>Reuse macro</i>: MacPac's Reuse macro allows users to recycle or rebuild their documents based on any MacPac template and ensure firm styles, court rules, letterhead, even contact information (in a future release of MacPac), will update automatically for the new document. The “dupe and revise” methodology used by the majority of users (e.g., copy an existing document and hopefully remember to update pertinent information and consistently format the new document) is automated through this feature and ensures information is updated and text is formatted with the firm's latest styles and standards. Reuse ensures “first generation” documents each and every time and encourages best</p>		<p>Not only does Innova help you streamline and standardize your document creation &amp; production processes, but it helps you streamline and standardize your development processes as well.</p>	
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					<p>practices for all recycled documents.</p> <p><i>(c) Insert into Current Document macro:</i>  MacPac allows users to insert any standard boilerplate language or another template (either MacPac's or the firm's custom templates) into other documents. Faxes can be inserted into letters, proofs/certificates of service and notaries into pleadings, variable agreement or contract language inserted into business or transactional documents, etc. Administrators can specify not only which documents can be inserted into a destination document, but where in the document the inserted text is placed.</p>			
2.	The CCC Macro System provides a complete system of styles that may be selected from categorized menus, a style formatting toolbar that makes it very easy for anyone to make global formatting changes in a document, and a	Low cost, easy to use, implement and maintain solutions.	<p>Our Law Office Automation Tools simply provide MORE. That is truly unique.</p> <p>We offer the most comprehensive set of built-in, high-end business/legal templates, wizards, processes and</p>	Users can store and re-use dialog box selections for personal use even while offline. In addition, the user's most recently used public selections will be available for re-use while offline.	<p><b>Template Architect™:</b>  MacPac allows non-coders to create fully functional MacPac-like custom templates. These templates can be created simply by designing Word bookmarked documents and</p>	<p><b>Recipient Lists and Document Data can be saved and reused in any document created using the Forms Assistant.</b> For example, a user might have a set of four contacts for whom they frequently draft</p>	<p><b>SQL Architecture.</b>  The move of Innova's data repository to a SQL database offers an unparalleled level of robustness, scalability and flexibility, as well as a centralization of management. With SQL, the user can</p>	WordAssist created documents can be safely shared with clients and reintegrated into the WordAssist environment without any special processing

	<p>personal style libraries features that allows users to save their own style customizations for future use.</p>		<p>macros. We include the Enterprise Address Book for centralized Contact, Case Lists and Marketing. We support advanced processes such as "Carry Over" that allows users to re-use old documents while ensuring that the new documents are created correctly and that Contact, Office, Logo and Employee data is automatically reused and updated.</p> <p>Without additional fees – our product integrates with a variety of email products and all MAPI compliant Contact Books (including InterAction).</p> <p>We also integrate with popular document management systems and provide desktop faxing integration modules. We offer Enterprise solutions for Mobile users, Outlook Synchronizer, Database Replication Modules and an intra-net Web control.</p>		<p>entering data into our database. All major MacPac functionality, including document reusability, author detail, contact integration, letterhead, multi-types, and style standardization is supported by these templates. In addition, database driven customization techniques allow administrators to create and customize any number of additional MacPac elements (e.g., additional letterhead, draft stamps, pleadings, notaries, proofs/certificates of service, verifications, labels, envelopes, etc.) without any code.</p>	<p>correspondence. From our Letter userform, the user can easily grab those contacts from Outlook, save them as a recipient "list", and reuse them in future letters. They can even pull that same recipient list into a fax or memo.</p> <p>We also go a step further and allow the user to save the entire set of document "data." For example, let's say a document contains certain recipients, along with a delivery notation and confidentiality phrase, ReLine text and signature block. By clicking a button in the userform, all this data can be saved and then later pulled into any other applicable userform when creating future documents.</p>	<p>now share QuickFills, proxy to another user's preferences, connect from anywhere in the world and run the product in any language.</p>	
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			We are competitively priced with products that provide far less. So MORE is simply better.					
3.	The CCC Macro System provides a simple approach to outline numbering, allowing firms to pre-define as many of their own numbering schemes as desired, but also allowing users to customize the numbering within their documents quite painlessly.	Full-featured PDF creation <b>without</b> Adobe Acrobat at a fraction of the cost.	KI Systems is unique in that we believe in your ability, skill, knowledge and expertise. Are products are high-end, flexible and top notch, but we are only successful when you are successful. We support more than our just our products. We believe in supporting you. We support you through product selection, design, product integration, testing, troubleshooting, implementation, training, daily-to-day use and software & product version upgrades. We are a macro vendor, but with our products we also become an integral part of your winning team.	Contact information is automatically verified when re-using saved selections. For example, if the user selects a contact from Outlook for use in a letter and stores that selection, the next time that selection is used, ezSearch will automatically use the current information for that contact such as name, address or phone number.	<b>Author Preferences:</b> A MacPac user can set and save author preferences in the letter, memo, and fax templates. In fact, a user can save multiple sets of author preferences for a particular author. For example, if Author A works in both the New York and San Francisco offices, user X can save two sets of letter preferences – one for when the author creates a letter formatted for the New York office (with New York specific information such as direct dial), and one for when the author creates a letter formatted for the San Francisco office (including their San Francisco direct dial). Preferences can be shared easily among users. Firm defaults, and even office defaults, can be specified by the administrator.	<b>We leverage Word’s existing or “native” functionality.</b> By doing so, we take maximum advantage of the Word platform, while amending some features to work better for the legal community. For example, the Numbering Assistant automates the process of applying complex legal numbering schemes using Word’s built-in heading styles. No only do the infamous “Jason” tabs go away when the Numbering Assistant is used to create and applying numbering schemes to pre-Word 2002 documents, but the schemes are also completely flexible, customizable, and compatible with Word’s Table of Contents generator and features. Best of all, we use native Word features that we’ve automated through macros. This is critical because, if native features are not used, sharing documents with	<b>Simplicity of Design.</b> We have spent a tremendous amount of time on the simplicity of the design of our interface. All information in Innova is presented to the user in a single dialog (no tabs, no wizards). This allows any user, with minimal training, to easily and readily fill out an Innova dialog, click OK and get on with their work. We thereby allow the user to focus on the actual content of the document being created, not the steps needed to create it. Additionally, the incorporation of the Windows Explorer style interface with Innova (through use of tree views, drag & drop technology and right-mouse click menuing) further simplifies the product design. Users can work with an interface with which they already have experience, even before Innova is	WordAssist is easy to extend through the reusable programmable components

					<p>others outside your firm becomes a problem. This means that you can send these documents outside the firm (e.g., clients, co-counsel, etc.) and they can continue to use the numbering scheme by simply selecting the correct heading styles from Word's Styles dropdown list on the Formatting toolbar and they can insert a Table of Contents by simply using Word's native TOC feature to insert the table. They don't need to have the Numbering Assistant tool to perform any editing on the document.</p> <p>We believe Word is an incredible product and our goal is to build on what the product already offers in order to improve the overall productivity and experience for legal users. Most importantly, the resultant documents don't have anything that "binds" them to our program code. So, in the end after documents are created, everything looks good and works well for both</p>	<p>before Innova is installed in their environment.</p>	
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						the end users who produce the documents, and others whose hands may touch the documents inside and outside the client's environment.		
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