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Office 365: The Lawyer's Preview

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Introduction

Overview

Microsoft Office 365 delivers much more than Microsoft Office cloud apps and online file storage. It ushers in new approaches in multiple areas:

- Collaboration and file sharing via team websites
- Email and communications hosted in the cloud
- Lightweight, friendly cloud apps for Word, Excel, PowerPoint and more
- New subscription pricing for Office 365 bundled with Office 2013 software

With Office 365, Microsoft is charting a path into the future of computing. It offers a flexible hybrid approach to using traditional, desktop MS Office software, lightweight cloud counterparts, and file storage both locally and in the cloud. Office 365 opens the doors to collaborating in teams with clients, associates and others.

Scope of the Topic

In our presentation and in these pages, we cover:

- Collaborating with MS Office 365 -- Share access to files, share screens and portals.
- Online/Offline/Anywhere Access -- Work with files on computers, in the cloud, on tablets and mobile phones.
- SharePoint and Office 365 -- Create sites to share documents and information with colleagues and customers.
- Lync and Office 365 -- Connect with others through instant messaging, video calls, online meetings, and phone calls.
- Hosted Exchange and Office 365 -- Use business class Email, calendars and contacts in the cloud and with MS Outlook.
- Pricing and Options for Office 365 -- Understand the pricing plans, options and limitations of Microsoft subscriptions and software purchases.
- Comparison: Office 365/Google Apps/Zoho/Office 2013 -- Compare the strengths and limitations of three cloud-based contenders and the MS Office software.

Terminology

Cloud Apps - Applications that operate in Web browsers and that are hosted by commercial service providers on their servers.

Office 2013 - The latest Microsoft computer software suite of business applications including Word, Excel, PowerPoint, Outlook and others depending on the edition.

Office 365 - A suite of Microsoft productivity, storage and collaboration services and applications that work together both in the cloud and on computers and mobile devices available in both personal and business plans.

Traditional or Premise Apps - Software and applications that are installed on personal computers, servers and local networks on the users' premises.

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Collaborating with MS Office 365

One of the most intriguing aspects of the new MS Office 365 is the integration of tools that allow a firm to take advantage of collaboration and sharing with people inside and outside the firm. Prior to Office 365 this type of functionality was available to firms via server applications like Lync, Exchange, and SharePoint which involved significant expense and IT support.

While the traditional MS Office suite made it possible to share documents via a network or Email, the new MS Office 365 expands those options to create a more collaborative environment. For instance, you can create a MS Word document, and then save it to your Team Site to share with co-workers or outside counsel, enabled by SharePoint Document Workspace. Online "lite" browser apps let you simultaneously or asynchronously edit a document, even if the other party doesn't have MS Word.

Lync gives you the ability to share the document in real time through the web to let others instantly view and collaborate. Lync also lets you send the document via instant messaging, and initiate a quick chat.

SharePoint, included in MS Office 365 subscriptions, gives you a place to store and organize documents, with providing more ways to organize the information than the traditional file/folder structure.

Tight integration of MS Outlook with MS Office 365 means your Email program just became supercharged with Lync's collaboration functions. Instantly start a video chat or screen share from an MS Outlook Email. Features and functionality that were formerly only found in enterprise installations can be had by any size firm, with little IT know-how.

Online/Offline/Anywhere Access

MS Office 365 provides users access to documents and Email in almost any environment. The traditional Office suite is still locally installed on a device and available as long as you have power. The Office suite files are then saved or synchronized (depending on your MS Office 365 plan) to the cloud via your Team Site powered by SharePoint. This gives you access to the documents as long as you can log in via the Internet. Apps for every mobile operating system (Apple, Android, BlackBerry, Symbian, Windows) are available.

MS Outlook is also available via MS Office 365, showing your Email, contacts, calendars, and tasks as well as group folders and shared calendars online, on your desktop or via your mobile devices. With MS Office 365 firms no longer need a networked file server, virtual private network, and MS Exchange to securely access documents and Email anytime, anywhere.

SharePoint and Office 365

MS SharePoint has been around since 2001 and was initially used as an intranet and file management tool. Available for free to download to Microsoft Windows Server 2008 in a few "lite" version, MOSS (Microsoft Office SharePoint Server) has long been available to many small law offices, but rarely used. The need for installation, configuration, end user training, and adoption found MS SharePoint time-consuming and expensive - despite the free download - for many small firms.

Large firms embraced MS SharePoint, however, and many large firms maximized the additional functionality it provided, along with integration to Enterprise Resource Planning systems and other extensibility. One reason for large firm adoption may be due to the fact that their clients use it. Gartner Group put SharePoint in the "leaders" quadrant in three of its Magic Quadrants (search, portals, and enterprise content management) and about 78% of Fortune 500 companies use it.

MS Office 365 comes with SharePoint as the backbone of many of its collaborative features including document sharing, tasks, libraries, announcements, document libraries, social interactions, and more. Since MS Office 365 comes with a version of SharePoint, the functionality is integrated and available to any user. So, what can it do?

Intranet Portal

MS Office 365 comes with “Team Site” in small business (and up) versions. The Team Site is a searchable portal that centralizes access to information including tasks, social collaboration, discussions, and even a blog. Firm calendars, announcements, and document libraries can be created for different practice groups. Administrators can give access to certain people to add or edit information at any level. End users can request alerts via Email to new posts, tasks, or documents, plus “like”, tag and make notes on items.

Extranet

The MS Office 365 Team Site powered by SharePoint can serve as an extranet, allowing access to documents, workflows and more to people outside of the firm as long as they have permission, internet access and a username/password to the site.

Firm Website

MS Office 365 comes with a template based firm website for the public. By default it comes with a home page, “about us”, “contact us”, a site map and member login. Editing the website pages does not necessarily require any coding skills, as the basic pages and available standard templates provide a WYSIWYG (what you see is what you get) interface that makes it relatively easy to edit and add pages. However, if you want to go beyond the basic there is an “invite designers” permissions button to make it easy to allow your current website designer to add code, alter CSS, or other design work. The really nice thing is that the firm now has a content management system for their website, so that they can add documents, update content, and make changes without contacting the website designer. Also, the website comes with a link to the client extranet (the “member login” label can be renamed). While most marketing people will suggest a custom website is worth the money, if the firm has an older, dysfunctional website or none at all this would certainly be an improvement.

Document Management

The document management features in the Team Site are not as robust as those found in a standalone document management application like Worldox, however features like checkin/check out, version history, editable file properties, and document permissions are available. You can also create a shared document workspace which automatically creates the ability to add and assign tasks related to the shared document and links to relevant information.

Maximizing SharePoint

This merely scratches the surface of the functionality of the Team Site powered by SharePoint in MS Office 365. To truly get the best use out of this powerful tool the firm would be well advised to consider what they would like to be able to do and get help or training in order to design and configure a functional online space that meets their needs. While basic setup is self-explanatory, someone with SharePoint experience can create a remarkably robust collaborative platform in little time.

Lync and Office 365

Like SharePoint, the Microsoft Lync Server has been available and used by enterprises since 2003, when it started an instant messenger service. The product evolved and added IP telephony and video conferencing. Now, integrated with MS Office 365, Lync is installed and primarily integrated with MS Outlook, although Lync functions appear in menus in other office applications as well as your Team Site. Lync extends MS Outlook to provide instant messaging, presence (available/unavailable), desktop and application sharing, VoIP telephony, and audio/video/web conferencing functionality.

Lync does have an installed component with Office 365, which gives you a dashboard to see your activities, start a conference, group chat and other functions. This piece of software will run at startup by default, and you will use your MS Office 365 login to enable the functionality.

Conferencing with Lync

Lync lets you invite a contact to an audio or video conference with a single click, or schedule something for later. In audio conferences attendees can see who is speaking, which reduces confusion. Conference organizers can configure a meeting to require a meeting ID and PIN, and users can be screened by the conference organizer before being allowed into the meeting.

Share Word documents or PowerPoint slide decks with your contacts in a few clicks. You can grant certain participants the ability to make edits to the document they are viewing. They will see nothing else on the desktop. If you want to share your entire desktop, schedule a meeting through MS Outlook or via the Lync interface.

Conference setup via Lync lets you share attached files and set up polls and whiteboards, as well as take notes with MS OneNote and record the proceedings. It is as robust as competing web meeting tools such as Webex and GotoMeeting.

VoIP - Phone Service vis Lync

Lync can enhance or replace a traditional phone system. Lync voice capabilities include answer, forward, transfer, hold, and 9-1-1 calling.

Call management features include call forward settings to simultaneously ring an additional user, use team calling to ring a certain group till one person answers, delegate calls and more.

Because of the tight integration with MS Outlook, users can see if they have a new voicemail in the Lync client or receive and Email with a preview of the voicemail.

Depending on which version of MS Office 365 you get, Lync functionality includes archiving and retention via Exchange eDiscovery.

Hosted Exchange and Office 365

Many law offices use MS Outlook for Email, calendars, contacts and more. However, without the MS Exchange server the truly useful group features of the program are lost.

In addition to the group functions like shared calendars and contacts, delegation, and appointments, the Microsoft Exchange server also provides MS Outlook to any user on the web via Outlook Web Access (OWA), ActiveSync (remote wipe, security policies, PIN lock for mobile devices), POP and IMAP protocols for other accounts, antispam and antivirus, bigger mailboxes, retention settings and permissions for end users, and lots of add-ons and integration with business applications.

The traditional version of the Microsoft Exchange requires at the least a server and a network. The installation and setup can be very complex. A knowledgeable consultant or IT person is needed to set up and maintain Microsoft Exchange.

Good News for Small Firms

The good news now for small law firms and even solos is that they can take advantage of Exchange without all the expense and hassle. They can subscribe to MS Office 365 with Microsoft's Hosted Exchange and receive the same benefits that the bigger firms get with their on premises Microsoft Exchange servers.

Microsoft Outlook at the Heart of Office 365

Together with the Team Site powered by SharePoint, MS Outlook is the heart of the online/offline/anywhere experience in MS Office 365. MS Outlook is available online, on the desktop and via mobile devices. MS Outlook houses voicemail, Email, calendar, reminders, contacts, tasks and integrates tightly with MS OneNote and Lync. It also acts as "groupware" giving the whole office the ability to easily share and coordinate on deadlines, events, and communication.

Shared Contacts

In addition to forwarding contacts, MS Office 365 lets you share contacts as well. Share your contacts with specific people and request that they share contacts with you. The firm administrator can also add contacts to the global address book.

Shared Calendars

Like contacts, you can share your calendar and others can share their calendar with you. You can also create new calendars and group calendars that people with permission may view or edit. You can also give specific people the ability to interact with your calendar including read, write, or delete with many options available.

Shared Inbox

You can authorize certain people to view, edit, or receive emails on your behalf, as well as create group inboxes so that a certain group can all receive Email in a central location.

In addition to making MS Outlook mobile with online access and mobile integration, MS Office 365 gives firms the ability to share day to day operational information, including the all-important calendar easily.

Pricing and Options for Office 365

The pricing and options for Microsoft products have always been confusing. The Microsoft Office business software programs, Word, Excel, PowerPoint, etc., have been bundled into Office suites in varying combinations. The licensing options for businesses are complex and numerous. Some licenses allow multiple installations that may be used by different users and others allow use only by one user. Some may be transferred from old computers to replacement computers. Others cannot.

The pricing and options for Office 365 and for Microsoft's new Office 2013 suite continue the tradition of confusion. Yet a review of the choices leads to a *single, best recommendation* for practically everyone.

Requirements for Office 365

Web Browser Software

Office 365 works in Microsoft Internet Explorer 8 or later, Safari 5 or later, and in the latest versions of the Firefox and Chrome web browsers

Windows 7 or 8 is required to use the Office 2013 desktop software included with Office 365. Windows XP cannot run Office 2013.

Mobile Devices - Any mobile device with a high speed cellular or WiFi connection to the Internet and a good web browser can connect to Office 365. At this writing there are no mobile apps for iPhone, iPad, Android or other devices, but rumors suggest that Microsoft will be releasing Office 2013 for various phones and tablets.

Recommendation: Buy Office 365, not Office 2013 software

Subscribing annually to *Office 365 is less expensive* for almost everyone. An Office 365 subscription provides better options than buying Office 2013 software.

Why? Because Office 365 *includes* licenses for the Office 2013 software and allows the user to install Office 2013 software on up to *five computers and devices*.

With an Office 365 subscription, the user can *stream the Office 2013 software* on any computer anywhere without installing it on the hard drive.

The license for Office 2013 does *not allow transferring* from one computer to any other computer. So if you ever need to replace your original computer or switch to another computer, you must buy a new license for Office 2013.

Finally, Office 365 bundles *more cloud storage space* and allows the user to easily save and open files from the cloud and in the cloud. In contrast, the Office 2013 software for business users must be paid for separately for each computer and device.

Yes, many computer users are averse to subscription pricing. They like the feeling of *owning* their software and using it as long as they want to. Business users can still do that with the Office 2013 desktop software, but it is locked to one and only one computer. When it dies or retires, a new license must be purchased without any upgrade discount. Upgrading to a new version of Microsoft Office will also require a new purchase without any upgrade discount.

Microsoft has heavily slanted the pricing, multiple computer use, and features toward Office 365 with its subscription model.

Example - Cost of Office 365 vs. Office 2013

This example illustrates the costs of Office 365 vs. Office 2013.

Office 365 - 1 User - 2 Computers

Office 365 Small Business Premium

Includes: Office 2013 desktop software: Word, PowerPoint, Excel, Outlook, OneNote, Publisher, Access, and Lync
Cloud apps for Word, Excel, PowerPoint and Outlook

Devices: Licensed for up to 5 devices. May be transferred from old to new device.

3-Year Cost: \$450 (Monthly payments of \$12.50)

Office 2013 - 1 User - 2 Computers

Office Home & Business 2013

Includes: Office 2013 desktop software Word, PowerPoint, Excel, Outlook, OneNote

Devices: 2 licenses for 2 devices. May never be transferred to a different device.

3-Year Cost: \$440 (Paid up-front for 2 computers)

Bottom Line: Office 365 Subscription Costs Less and Delivers More

Unless you use just one computer for 3 years and never need to use Office 2013 on any other computer or device, an Office 365 subscription costs less, delivers more desktop software (adding Publisher, Access and Lync), includes Email service, and is paid for

with interest-free monthly installments. Office 365 Small Business Premium lets you install the Office 2013 program on five different devices.

Office 365 for Home Use

The above comparison is for business users. Home versions of Office 2013 are available and have different licensing details. Home versions may not be used in a law practice or for any commercial purposes.

If you want family members to be able to use Office 2013 on personally owned computers and tablets, your best bet is to buy a *single subscription to Office 365 Home Premium*.

Why should you subscribe to Office 365 Home Premium for \$100 per year? That subscription lets you *install Office 2013 on five machines* (Word, Excel, PowerPoint, OneNote, Publisher, Access, and Outlook). Unlike the business license that limits use to one person, the home license allows multiple people to use the Office software on 5 devices.

If you buy the Office 2013 Home & Business software, you would have to buy separate licenses for each machine at \$220 each and buy them again whenever you purchase a replacement or new device.

Pricing Overview for Office 365 and Office 2013

Microsoft announced pricing effective February 27, 2013 for the Office 365 service and for the Office 2013 software suites.

Office 365 Plan	Office 365 Home Premium	Office 365 Small Business Premium	Office 365 Midsize Business	Office 365 Enterprise & Government
Per Month	\$8.33	\$12.50	\$15.00	\$20.00
Office 2013 Edition	Office Home & Student	Office Home & Business	Office Standard	Office Professional Plus
Per PC	\$139.00	\$219.00	\$369.00	\$499.00



OLD PRICING - Office 365 Midsize Business and Enterprise

When these materials went to the publisher in February 2013, Microsoft had not yet rolled out its business versions of Office 365 and was not publishing detailed materials. Although the following Office 365 informational screenshots show obsolete pricing, they offer details on the features and services bundled in Office 2013.

MIDSIZE BUSINESS & ENTERPRISE (Plan E1) \$8 per user/month	MIDSIZE BUSINESS & ENTERPRISE (Plan E3) \$20 per user/month
BUY NOW	BUY NOW free 30-day trial
User maximum: 50,000+	User maximum: 50,000+
Everything in Small Business, P1*, plus: <ul style="list-style-type: none">• Active Directory synchronization• Configurable anti-spam filtering• SharePoint intranet supporting up to 300 site collections• Live 24 x 7 IT-level phone support <p><small>* Please note: with E1 you can only view Word, Excel, PowerPoint, and OneNote files online. With E3 you can both edit and view these files online.</small></p>	Everything in E1, plus: <ul style="list-style-type: none">• Office Professional Plus 2010 desktop version 2013! subscription (for up to 5 devices per user)• Email archiving and unlimited email storage• Hosted voicemail support• Connection to line-of-business applications• Dashboards with Excel Services

Annotations added. Obsolete pricing. Compatible with Office 2007, 2010, 2013; For Mac: Office 2008, 2011. Included to show differing features.

Old Features and Pricing - Office 365 Plans

	Email	P1	E1	E2
	\$4 Per user/month BUY NOW	\$6 Per user/month BUY NOW <i>free 90-day trial</i>	\$8 Per user/month BUY NOW	\$14 Per user/month BUY NOW
<i>All plans are compatible with desktop versions of Office 2007, Office 2008 for</i>				
User maximum	50,000+	50	50,000+	50,000+
Cloud-based email <i>25GB of storage space per user</i>	●	●	●	●
Contact and calendar sharing	●	●	●	●
Intranet site for your team		● (1 subsite)	● (up to 300 subsites)	● (up to 300 subsites)
IM, PC-to-PC calling, and video conferencing		●	●	●
Hosted website for your business		●	●	●
Create and edit Word, PowerPoint, Excel and OneNote files online		●	(View only)	●
Premium antivirus and anti-spam filtering	●	●	●	●
Configurable anti-spam filtering	●		●	●
Microsoft community support	●	●	●	●
Live 24 x 7 phone support <i>for advanced IT support issues</i>	●		●	●
Active Directory integration	●		●	●

Annotations added. Obsolete pricing. Compatible with Office 2007, 2010, 2013; For Mac: Office 2008, 2011. Included to show differing features.

Pricing for Google Apps and Zoho

Office 365 competes directly with Google Apps and Zoho. The competitors offer significantly lower pricing. Yet Office 365 includes licenses for all the Office 2013 desktop programs making the Microsoft plans especially attractive.

Google Apps for Business

At \$5.00 per user per month or \$50 per year, Google Apps for Business bundles all the important business applications for one-third the price of Microsoft 365's least expensive business offering.

Zoho

At \$3.00 per user per month for Zoho Docs, Zoho offers the least expensive service. But you need to add about \$2.50 per month for Email. Zoho currently includes only 2 GB of online storage space. Additional space is available at \$3.00 per month per 5 GB. Zoho offers a variety of applications that have additional monthly subscription fees but are free for small numbers of users.

Comparison: Office 365/Google/Zoho/Office 2013

Office 365, Google Apps, and Zoho each offer a core set of business apps in the cloud:

- Word processor
- Slideshow
- Spreadsheet
- Email
- File Storage
- File Sharing

In addition, they each offer a range of additional, specialized applications that vary in price and in the ways they integrate with each other.

An area where these three services differ is in their ability to link to cloud practice management applications. Only Google Apps links to most of the leading cloud law practice management services.

	Office 365 Small Business Premium	Google Apps for Business	Zoho	Desktop Software
Features				
Web Apps	Word PowerPoint Excel OneNote		Writer, Docs, Show, Sheet, Projects, CRM, Invoice, Planner, Mail, People, Reports, more...	No
Sharing	Yes	Yes	Yes	No
Offline Editing	Yes	Document & Spreadsheet	Yes	Yes
Revision and Versioning	Yes	Yes	Yes	No
File Sync	Yes with SkyDrive Pro	Document Presentation Spreadsheet	Yes	No
Email	Yes	Yes	Yes	Yes requires hosting
Cloud Practice Mgmt Links	LiquidPractice	ActionStep Clio MyCase Rocket Matter*	None	Yes
Pricing per User	\$12.50/mo. Includes Office 2013 lic.	\$5.00/mo.	Varies	\$369 - \$499 per version

Feature Comparison - Office 365 vs. Google Apps vs. Zoho

Business Applications

Word Processor Apps Compared

The Office 365 Word App is a stripped-down version of Microsoft Word. It can open a regular Word document and will not destroy the original document's complex formatting, but it cannot add or change much of the specialized formatting available in the desktop Word software.

Office 365 supports near real-time collaboration. It also allows users of Microsoft Office desktop software like MS Word 2013 to connect with Office 365 users. Limitations apply to this sort of sharing based on access control and changes may not be apparent until a co-author saves changes to a document.

The Document app in Google Apps also opens and edits Microsoft Word documents, but some of the original document's special formatting, such as automatic Table of Contents and merge fields, is lost when the document is re-saved by Google Apps.

You may give editing rights to other users of Documents in Google Apps. When someone with editing rights makes additions or changes, the new version is synchronized to the Google Drive and to the offline folder of all users with rights to the document. A history of versions is maintained online in each user's Google Drive. This feature does not work exactly like Track Changes in MS Word, but does support collaborative editing of documents.

Zoho Docs has a very capable online word processing application, but it doesn't match the desktop version of MS Word. Zoho Writer can open, edit and save documents in MS Word format, PDF and plain text. Its native formatting capabilities include the basics - bold, italics, and underline.

Slideshow Apps Compared

The slideshow or presentation apps from all three services may actually serve most users better than their full-blown desktop software counterparts. The features of the Office 365 PowerPoint App are familiar to PowerPoint users. Its menus and controls are streamlined and very different from those in PowerPoint desktop software. PowerPoint shows created in the Office 365 App can be opened and edited in PowerPoint desktop software. True power users who make use of advanced features will still want to edit their presentations in desktop PowerPoint. Using Office 365, they can easily upload their presentations into Office 365 and then present anywhere they have a device with a Web browser and an Internet connection.

The same holds true for Presentation in Google Apps. It has a clean interface and is more than adequate for many types of presentations; however, the number of pre-formatted slide templates is limited. There are not nearly as many templates available for Google Apps Presentation as there are for Microsoft's PowerPoint program.

Spreadsheet Apps Compared

The Excel app in Office 365 may eke out a win over the competition simply because so many spreadsheet users are familiar and comfortable with Excel. The app does not have the advanced formatting and viewing capabilities of Excel 2013 (split screen, hide columns, freeze, etc.), but it does deliver familiar formulas and options for borders, shading, text colors, and cell formatting.

Spreadsheet in Google Apps is responsive and the interface is simple to navigate. Its set of features seems indistinguishable from the Office 365 app except for two important differences.

1. If you want to begin a spreadsheet in the cloud and later open it in a more powerful desktop program such as Excel, the Google Spreadsheet takes more steps. From the File menu, you choose Download As, click Microsoft Excel, give it a name, and press Enter. Then click the button for that file at the bottom of the Chrome browser to open it. With the Excel app, you just click a button at the top: OPEN IN EXCEL.
2. Google Apps lets you save the spreadsheet as Microsoft Excel, PDF, Open Document, CSV, Plain Text, or HTML. The Office 365 app only saves to the Excel .xlsx format.

Zoho's Sheet app handles mathematical calculations and basic formatting like its competitors. But to create tables that contain attractively formatted text headings and blocks of textual details, you will need something different.

Additional Applications

Beyond these essential business applications, each of the services offers a variety of other special purpose apps. Office 365 includes the flexible note taking program, One Note. Google Apps includes Form for Creating Fill-in-the-Blank Forms drawing for producing illustrations. Both Office 365 and Google Apps can be enhanced by selecting from among a wide variety of special purpose add-in applications. Zoho has its own long list of highly specialized and often very powerful online applications.

All of the services offer methods for providing access to documents and other files by granting rights to other subscribers. They also provide for various levels of live collaboration on documents and other objects.

Conclusion

With Office 365 Microsoft blends online services for communications, document creation, sharing, file storage and teamwork with a new version of its desktop suite, Microsoft Office 2013.

Microsoft faces strong competition from Google with its Google Drive and Google Apps for Business. At this point *only Google* links with leading law practice management apps. That is a *big selling point* for many law firms and solos.

Google works well with MS Word and other Microsoft software files. Yet *only Microsoft* bundles Office 2013 with its cloud service, a *real savings* for the large base of users who like Microsoft Word, Excel, PowerPoint, Outlook and other Microsoft programs.

By tying Office 2013 tightly into the cloud via Office 365, Microsoft hopes to take the lead in cloud computing and maintain its loyal base of Microsoft Office software users. Microsoft has put together a compelling bundle that can reduce if not eliminate the expense, updating and maintenance of pricey local file servers and their complex server applications.