How to Do 90 Minutes of Work in 60 Minutes

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Perception: There is so much technology, that it seems to take me longer than ever to do everything.

Perception: I have way too much paper to ever go paperless.

Perception: I can't possibly work without my papers.

Perception: I'll never get out from under all this work.

Reality: Managing technology, paper **_and your time_** is easy once you:

- ✓ Harness the power of technology.

- ✓ Reduce your reliance on paper by acknowledging that

    - o You don't need to save all of the paper you save;

    - o It's faster and easier to rely on technology to handle paper;

- ✓ Organize everything you save electronically.

That's all you need to do. It's simple – providing you are:

- ✓ Open-minded;

- ✓ Willing to explore all of your options;

- ✓ Willing to **_actually learn how to use the software you already have;_**

- ✓ Willing to reduce or eliminate paper; and,

- ✓ Willing to automate as many routine tasks as possible.

Businesses, law offices, organizations, and individuals will often make decisions or changes in their operations that cost significant amounts of money, yet they are often hesitant to invest even a small amount for the technology, including training necessary to improve their day-to-day operations. By ignoring the ways technology makes things easier, they are stubbornly clinging to the belief that the old way of handling paper and managing their time is still the best and most efficient method of doing business.

In fact, by doing their work the "old fashioned" way, it takes longer to accomplish most tasks. And every time they handle a piece of paper, they are actually "wasting" time. Rather, if they used just a bit of the technology available, they could probably do 90 minutes of work in 60 minutes.

Consider the following well-known example: If your time is worth $150.00 per hour, and you can save just 6 minutes per day by using technology, a $1,500.00 technology investment will pay for itself in less than five months (6 minutes x 5 days per week x 50 work weeks per year = 25 hours = $3,750.00). Although this makes economic sense, many businesses simply refuse to take the leap of faith required to accomplish this goal.

Train, Train, Train, Learn, Learn, Learn

Were you trained to drive a car? Do you take continuing education courses and attend seminars and programs to enhance your professional knowledge? Do you want to learn more so that you can do your job more effectively? Hopefully, the answers to each of these questions is "yes." The same answer applies to technology. Perhaps you have received training in some specialized, job-specific programs you use, but have you been trained how to use Windows, Word, Outlook and the other programs that you rely on – perhaps even more than you rely upon that specialized job-specific program your organization or business uses.

But, for various reasons, most people have never been trained in the rudimentary programs that are so crucial to their daily activities. Many schools, for example, require students who graduate to have a working knowledge of Word, Excel and PowerPoint. But do they teach the students how to use the programs? Generally not. After all, students from elementary through high school must graduate with certain levels of proficiency in math, science, history and other subjects, but the schools do not expect the students to learn those subjects through osmosis.

Why is computer software treated differently? And why should it be? In reality, it should not be treated any differently. While students may not need four years of Microsoft Word training, a semester of training would help students immeasurably throughout their lives – just as students who were "forced" to learn typing are more adept at the keyboard than their "hunt and peck" counterparts. Think how much time those proficient typers save. And in many cases, not only do they save time, they also eliminate the need for hiring a full-time secretary for those workers.

Acknowledge the need to reduce your use of and reliance on paper

Jane M. VonBergen of *The Philadelphia Inquirer* authored a series of articles in 2006 about the cost of clutter to businesses. In her initial article, she outlined the time and cost of paper shuffling and the inevitable search for lost paper:

> Every lost piece of paper costs a business $120.
> Imagine that.
> In fact, 15 percent of all paper handled in businesses is lost, according to the Delphi Group, a Boston consultancy group, and 30 percent of all employees' time is spent trying to find lost documents….
> In 2000, consultants for the Connecticut-based Gartner Group - the same folks who reported the lost-paper cost - estimated that, by 2003, the average professional would waste 30 percent to 40 percent of his time on "document-related non-value-added tasks," i.e., paper shuffling. Now some of that wasted time has moved from paper to electronics, with the volume of e-mail projected to rise 30 percent a year through 2008.

Let's figure that the average professional makes at least $1,000 a week - that's 15,600 to 20,800 wasted dollars per year per worker. Keep on multiplying. A company with 100 professionals could lose more than $1.5 million a year.

Canadian analysts calculated in 2002 that poorly managed information was costing the Canadian government $870 million a year in wasted time.

And in America, consultants found we're no better at managing our time. Professionals lose 2.1 hours of productivity a day to "unimportant interruptions and distractions." That's $588 billion a year, according to Basex Inc., a research and consulting group in New York.

But from a personal perspective, it's even worse. Disorganization on the job makes people stressed, according to another study, from the office supply company Esselte Ltd., and office stress sends out ripples of difficulties:

"Getting on top of the clutter: The financial and psychological costs of disorganization," by Jane M. Von Bergen, *The Philadelphia Inquirer,* February 26, 2006.

Think about it. Paper equals clutter, and every time you or your staff handle a piece of paper, you are "wasting time" and losing money. That is why it so important to reduce your reliance on paper. There are many ways to create "The Less Paper Office," but the key is learning to do virtually everything you have done on paper with your computer. At its core, this means document "management;" at its best, it means an integrated plan that encompasses everything you and your business do.

What is document management? Document management is nothing more than the ability to store, locate and retrieve documents using your computer. You can devise a system yourself, or you can deploy a document management system (DMS), *i.e.,* a computer program (or set of programs) designed to track and store electronic documents and/or images or copies of paper documents. Either way, a document management system will typically focus upon the creation of uniform procedures for:

- ✓ Storing documents

- ✓ Retrieving documents

- ✓ Organizing documents

- ✓ Securing documents to prevent loss, tampering or destruction

- ✓ Handling sensitive information

- ✓ Protecting documents from fires, floods or natural disasters

- ✓ Retention and/or destruction of documents

- ✓ Distributing documents

- ✓ Creating efficient workflows

- ✓ Collaborating on documents

- ✓ Authenticating documents

In addition, document management systems commonly have additional features, including:

- ✓ <u>Metadata</u>

Metadata is information about data and may describe, for example, how, when, and by whom it was received, created, accessed, and/or modified and how it is formatted. In a document management system, metadata is typically stored for each document. Some document management systems may extract metadata from documents automatically or prompt a user to add it. Some use optical character recognition on scanned images, or perform text extraction on electronic documents, so that the extracted text can be used to enable users to locate documents by keyword or full text search capability.

- ✓ <u>Integration</u>

Many document management systems integrate document management directly into other applications, such as case management programs, so that users may retrieve existing documents directly from the document management repository, make changes, and save the changed document in the repository as a new version.

✓ <u>Capture</u>

Most document management systems use Optical Character Recognition (OCR) software to convert digital images into machine readable text; this process is called capturing.

✓ <u>Indexing</u>

A hallmark of document management software is its ability to index documents and store unique document information.

✓ <u>Storage</u>

Document management systems provide for uniform storage protocols for documents, including where and for how long they are stored, and when or if they are destroyed.

✓ <u>Retrieval</u>

Retrieving documents easily is one of the most important functions of this software. While it sounds simple, retrieval of electronic documents can be complex. Thus, the ability to search easily for documents is very important.

✓ <u>Security</u>

Document management systems generally have very advanced security features that allow administrators to restrict who can retrieve and store various types of documents, and under what circumstances. Thus, for example, highly confidential documents may be handled very differently from routine correspondence.

In sum – you want to use less-paper.

Even if you don't purchase document management software, you can accomplish most of these changes by yourself, as long as you and your staff are consistent in how you handle your documents electronically.

The "Less-Paper Office"

The "paperless office." Remember that concept? Like the idea that paper checks would disappear, the promise of a paperless office remains a pipedream for virtually every business. After all, the mail still comes, faxes continue to fly out of the machine, and those e-mail printouts never seem to end, right? While an office without paper is probably not a reality for most people, there are options that will reduce the amount of paper you use while increasing your and your firm's efficiency.

None of the suggestions I offer requires radical changes to your office's procedures, and most merely require hardware and software you probably have, or may not even realize you have; in fact, most of these suggestions can be easily implemented with a scanner, preferably one with a sheet feeder, and a CD burner. What you also need is the willingness to tweak the way you (and your staff) do things.

Consider a typical client/customer/agency file. It is organized into sections, perhaps correspondence, memoranda, contracts, etc. Regardless, you should have all of these scanned to your computer or your server, and named so that you (or anyone else) can locate the documents easily. There are two reasons to do this. First, it is all too easy to misplace documents, and scanned copies serve as insurance. Second, when the client calls, you no longer have to place the client on hold, get up from your desk, search for the file, and then, once you find it, rummage through the morass of papers to locate the document you need. Instead, you simply locate the document on your computer, open up the file, and you are ready to discuss the document in seconds. You are more efficient, and your client is impressed by your ability to discuss the document and their project case at a moment's notice.

Let's jump ahead a bit. Suppose you are involved in a project in which you have to review voluminous records, encompassing dozens, if not hundreds or possibly thousands of pages. In a traditional setting, you would look through hard copies of every document. That is a lot of dead trees. Imagine if the records were electronic, indexed and searchable so that you could locate any item in literally a click of the mouse.

Why receive records electronically? There are numerous reasons. Your computer generally comes with the basic software needed to review these files, so you are already set up to do this. In addition, when you need to review the file, if you only print and highlight the truly relevant documents, they will be much easier to find instead of having to fumble your way through reams of paper. Thus, I recommend doing an initial review of the documents on your computer and printing only the pages that *may* be necessary.

For my nickel, every document should also be scanned and OCRed (optical character recognition). This process not only renders the documents searchable, it generally also allows you to copy portions for use when preparing other documents. As a bonus, if you misplace a document (which of course will "never" happen), there is a copy readily available.

One of the most important reasons to scan documents is the ability to OCR each one simultaneously. With the right software and little effort, you will be able to search virtually all of your documents in one pass, and finding that needle in the paperstack will be far easier. Although most software can OCR handwritten documents, the results vary based upon the legibility of the writing and sophistication of the software.

Consider this real-life example from my own law practice. In a recent case, plaintiff's counsel had suddenly named a new expert. Although he worked for the same company as another expert, we could not fathom why his testimony would have any more relevance than the

previously named witness. I opened up my Adobe Acrobat index and searched for the witness' name. Lo and behold, his name appeared once in about 5,000 pages of documents. Where? In one document in which another witness had cited the newly named expert's treatise, which of course supported plaintiff's theory of recovery. Obviously, when he identified this witness, plaintiff's counsel had intended to use this treatise to bolster his case, without ever disclosing that "little" fact beforehand. Needless to say, we promptly filed a Motion in Limine to preclude testimony by this new witness.

Jumping ahead, your work is concluded. Now what? When you close the file, if you have saved copies of the documents on your computer, you can burn a CD, store it with the files on it, and dispose of the documents. You will require far less physical storage space and, should the need arise, you can quickly retrieve the documents from your computer (or an archive) or directly from the CD you stored with the file.

Now that you have read what to do to reduce the paper in your office, the question remains: how to do it? The answer is by using a scanner, a CD burner, a tif viewer, and PDF software, which most offices already have. In smaller offices, with only one or two staff members, the idea of going paperless may seem particularly daunting. For those offices, I recommend implementing these steps progressively. In most instances, once you begin the transition to electronic storage, it becomes second nature.

Regardless of how much of this process you adopt, you must also backup your computer regularly.

Scanners

Scanners have become a necessity in most offices. A scanner analyzes a document or other image and processes it in a way that allows you to save it on your computer. If the

document contains text, a scanner can perform an OCR, thus allowing you to search and, depending on your software, use the text in other applications. If the document contains an image (picture), the scanner can save it in a manner that allows you to alter or enhance the image, print it out or use it elsewhere.

In recent years, scanning technology has improved dramatically. Sheetfed scanners have become far more common and much more affordable, and allow you to scan large documents at the push of a button. For around $300.00, you can purchase a scanner such as the Fuji Scansnap or Xerox Documate with a 35 to 50 page sheet feeder, which is sufficient for most small to mid-size offices. In addition, large copiers generally also serve as scanners. Either way, scanning is as easy as making a copy.

But the key to successful scanning is in the software. Most manufacturers supply all of the software you will need for free when you buy a scanner. For example, Hewlett Packard offers user-friendly software that makes scanning a snap; Fuji generally provides a copy of Adobe Acrobat (its mid-range version) with many of its scanners. Scanning is easy. You either open the software or click on the scan button, and the scanning begins. Once the scanning is over, the software asks you what format to save the images in, generally a pdf, and where to save it. Of course, if you need to save your document as an image, such as a tif or jpeg, you can do that just as easily. The advantage of the pdf format (rather than a jpeg or other "image" format) is that, with proper software, you can search one or more documents for keywords.

<u>**After You Scan – You Need Software**</u>

Scanning documents is just the first step. After your documents are scanned, you need the proper software to review them. Selecting the correct software for handling your documents is crucial to reducing paper and increasing efficiency. If you save your documents as pdfs, you can

review them with the free Adobe Acrobat Reader (downloadable at http://www.adobe.com). Adobe Reader allows you to view your documents, but not much else. If you purchase Adobe Acrobat, or comparable software, however, you can accomplish much more. For example, Adobe Acrobat easily performs an OCR on a document, allowing you to search its text, export it to Microsoft Word, or use it in other applications. Adobe Acrobat is relatively expensive (ranging from $300 to $500 per user/license, depending on the version); other companies offer less expensive alternatives, but without all of Adobe's bells and whistles.

My favorite feature in Adobe Acrobat is its ability to index documents (Adobe calls it a "catalog"). In the example above, the index encompassed over 400 documents, ranging from pleadings to exhibits to legal research to correspondence. It took about three seconds for Adobe Acrobat to find the one instance in which the newly designated expert witness' name had appeared in any of the documents. Without the index, we might not have learned until trial about the witness' treatise.

While Adobe is the standard for pdfs, the world of images (tifs, bmps, jpegs, etc.) is far different, and requires image software, called a "viewer." A viewer is a program that displays the contents of an electronic (digital) file. A viewer may be a stand-alone program or a component within a larger program. Generally, stand-alone viewers are more versatile than those contained in other programs; however, you cannot OCR an image. Thus, viewers are not an inexpensive alternative to pdf software.

Windows PCs come with Microsoft's viewer, which is extremely basic. If you plan to view images frequently, then the Microsoft viewer, which requires a user to open and close every image manually, is inefficient and will become a source of increasing frustration. There are many other viewers that allow users to scroll from image to image without having to open and close

each document. Users tend to have their own preferences, and most viewers are relatively inexpensive and generally offer free trials. Among the more popular viewers are IrfanView (http://www.irfanview.com), which is free for non-commercial use, and ACDSee (http://www.acdsystems.com), which is extremely easy to use, and sells for about $50.00.

File Naming

No matter how you implement your less-paper office, one factor critical to its success is creating a file-naming protocol. Where possible, your office should use a protocol that makes locating files easy, and allows anyone to determine the contents of a given file. Document management software (DMS) automatically performs this function, although many offices do not have DMS. For those offices, files should still be organized in an easy-to-use style, generally by client/organization name (after all, who remembers every account number?). There are then, generally, subdirectories for correspondence, memos, invoices, contracts, etc.

After you establish a file organizational structure, you should define a file-naming protocol. For example, save all letters as "Ltr to XXXX re YYYY, Date." I recommend that dates be in YEAR-MONTH-DATE format (2005-10-28) because it makes sorting similarly named files far easier. Thus, if you have four letters to your client, they will sort in date order when you are searching.

Email & Faxes

More and more, businesspeople and their clients communicate by email. The volume of email in some offices is overwhelming, and if the communication involves a client, you almost certainly have to save a copy – not only of the email, but also of your reply, and the reply to the reply, and the reply to the reply to the reply, etc. At times, the volume of email seems infinite. There is no reason, however, to print out every email you receive. The ubiquitous Microsoft

Outlook, and virtually every other email program, allows you to easily store email on your computer. So, unless the email is *that* important, don't print; instead, hit the save button.

As for faxes, old habits die hard. Many offices continue to rely on the machine, but there are better alternatives. For smaller firms, an online service such as efax (http://www.efax.com) may be the answer. Efax assigns you a fax number and sends your faxes to as many as five different email addresses, all for one annual fee, which is generally less than the cost of a fax line for a year. For larger offices, programs such as Right Fax (http://www.captaris.com/rightfax) may be the answer, albeit at a significantly greater cost. Using efax or RightFax, you can view an incoming fax on your computer in a host of formats, including pdf and tif. If the fax is unimportant, you can delete the email (without ever wasting the paper to print it). If it is important, however, you can save it to a client's file and, if necessary, print a hard copy. Most electronic fax programs also allow you to send faxes, but for most users the real convenience is the ability to receive and review faxes on their PCs.

Backup Software

This article has focused on ways to reduce paper by storing more data on your computer. If you intend to do so – and even if you do not – you *must* backup your data in case of a system crash. Although it is harder to lose an electronic file than a paper one, accidents happen, and you must backup your data daily (and religiously) to avoid arriving at the office only to learn that all of your data – in essence, all of your work – has been reduced to a large useless heap of metal. Regardless of how large or small your office, performing daily backups is a necessity.

It is unlikely that most businesses will ever have a truly paperless office. Instead, many can and should have an office with less paper. If implemented correctly, a proper backup solution provides insurance against a hard drive crash and, more importantly, gives you the peace

of mind to know that, when and if you go paperless, everything you need is just a moment away – on CD.

There Are Many Types of Time-Saving Software & Hardware

Among the types of technology you can use to accomplish more in less time (in law offices and other businesses) are:

- ✓ Back-Ups – Performed Regularly
- ✓ Bates/Document Numbering Software
- ✓ Calendaring Electronically
- ✓ Case Analysis Software
- ✓ Case/Matter Management Software
- ✓ Closed File/Case Procedures – Standardized & Electronic
- ✓ Deposition/Document Review Software
- ✓ Dictation/Voice Recognition Software
- ✓ Document Scanning to Achieve a "Less-Paper" Office
- ✓ Document Management Software
- ✓ Document Viewers, Including Adobe & Other Products
- ✓ Documents – File Naming Protocols
- ✓ Electronic Document Production
- ✓ E-mail Rather Than Snail Mail
- ✓ Faxes – Send & Receive Electronically
- ✓ Medical Records – Electronic Procurement (In lieu of hard copies)
- ✓ Metadata Removal Software
- ✓ Neat Receipts Portable Scanner & Similar Devices
- ✓ OCR (Optical Character Reading) Software – to Permit Easy Searches of Scanned Files
- ✓ Paper Use Reduction
- ✓ PDAs & Blackberry Devices
- ✓ Research Online
- ✓ Time Billing Software
- ✓ Time Line Presentation Software
- ✓ Trial Presentation Software
- ✓ Word Processing – Use Templates/Standardized Document Preparation Methods

Conclusion

You really can do 90 minutes of work in 60 minutes. All you need to do is stop handling paper, and transform your paper files into electronic ones. While the transition takes a little adjustment, I have yet to meet someone who, upon going "less-paper," ruminates about the good old days with all those piles of files.

Trial

TECH BRIEF

Are you ethically bound to be tech-savvy?

ly Daniel J. Siegel

Lawyers are required to maintain their skills in the practice of law, yet many attorneys fail to keep up with technological innovations that affect how they handle cases. That leads to the question: Are lawyers who refuse to use technology representing their clients competently ? In other words, by failing to use the latest technology, do lawyers violate their obligation to act competently on behalf of their clients?

In a recent civil trial involving a brutal rape, the defense lawyer used advanced technology to re-create the incident and show the jury other salient facts. The plaintiff lawyer, by contrast, used a cardboard model to show where the incident occurred and essentially eschewed the use of technology. Following a defense verdict, members of the jury said the defendant's use of technology in the case was an important reason why they ruled against the plaintiff, which makes you wonder whether the plaintiff received competent legal representation.

Rule 1.1 of the American Bar Association's (ABA) Model Rules of Professional Conduct says, "Competent representation requires the legal knowledge, skill, thoroughness, and preparation reasonably necessary for the representation." Comment 6 of the rule ("Maintaining Competence") states that "to maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law *and its practice*, engage in continuing study and education, and comply with all continuing legal education requirements to which the lawyer is subject" (emphasis added). According to the ABA Web site, "Competence in using a technology can be a requirement of practicing law. Requirements for technological competence may appear as part of rules for professional conduct, continuing legal education (CLE) programs, and malpractice insurance premium credits."[1]

Surprisingly, it is in the area of "practice" that many lawyers are deficient. Technology allows lawyers to find and review documents more quickly, annotate transcripts more efficiently, stay abreast of changes in the law with the click or two of a mouse, and re-create and present evidence in ways that give juries and judges deeper insight into how events transpired.

It can also help them avoid situations that can lead to legal malpractice.

Despite these benefits, many lawyers continue to practice as though computers do not exist. They ignore the advent of high-tech courtrooms and could be leaving their clients and cocounsel at a significant disadvantage.

Ensuring competence

In a thought-provoking keynote address at the annual law and technology conference LegalTech in New York, U.S. Magistrate Judge John Facciola questioned whether current CLE requirements can really ensure that lawyers are competent in their particular areas of practice.[2] Facciola offered many examples of technical incompetence: for instance, a lawyer who agreed not to use e-discovery, and a criminal defense attorney who admitted that he didn't "understand this computer stuff." These stories are alarming not only because of the lawyers' conduct, but also because of its impact on the lawyers' cases.

The solution to this situation is not simple. Still, lawyers clearly must adapt to new technologies to better serve their clients.

As times change, so does the definition of "competence." When I graduated from law school 25 years ago, we performed legal research using books and used electric typewriters to create documents. Westlaw and Lexis were in their infancy, but many of us couldn't use the services anyway because we had limited access to computers.

Some of you may remember Shepard's pocket parts, those annoying pamphlets that came in a seemingly endless variety of colors and that were the de facto method of verifying that the cases we were researching remained good law.[3] I'd be shocked if any attorneys still use the pocket parts.

As technology advances, so do our expectations of how lawyers will use these advances to benefit their clients. For example, it is the rare law office that uses typewriters, which have been replaced by PCs or Macs loaded with word-processing software. Some firms embrace technology; others fight it. The latter might end up relying on dated methods or denying that computers can make them better lawyers—and in the process shortchanging their clients.

The legal profession has debated the question of what constitutes competent representation for years, without reaching a consensus. And while many states have CLE requirements, none mandate that lawyers become competent in the latest law-related technology.

Medicine provides an obvious analogy. Twenty-five years ago, MRIs, CT scans, bypass surgery, and stents were either brand new or didn't exist. But today, there is no question that a physician who refused to use these and other advances would be considered incompetent and would be the target of numerous malpractice lawsuits, if he or she still held a license. Yet, we do not hold lawyers to an analogous standard.

With the advent of electronic discovery and electronic filing, lawyers are being forced to use technology in their offices for certain tasks. Yet these same lawyers may not feel obligated to use technology during depositions, while handling discovery, or at trial.

Those lawyers who choose to stay well behind the technology curve do so at their own risk. While a reluctance to take advantage of cutting-edge or even mainstream technology may not be unethical, it's not the best

business practice.

Clients tend to be far more tech-savvy now than they were just a decade ago, and those who recognize the importance of technology in litigation may well select counsel based on their level of technological expertise. And it isn't hard to imagine a scenario where a lawyer's refusal to use technology might form the basis of a legal malpractice claim.

Many lawyers still remember using typewriters, carbon paper, and onionskin paper and may never have dreamed that in just a few years these onetime staples would become obsolete. Times change, and lawyers who fail to change with them may find themselves at a distinct disadvantage.

Technology may not always be easy to use and it may not always be fun, but neither is legal research. Yet both are crucial to your work. You would never think of writing a brief without researching the issues; your technological obligations are just as important.

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Notes:

1. www.abanet.org/tech/ltrc/research/ethics/competence.html.
2. Joseph Howie, *LegalTech New York: No Excuses, LawTechnology News* (Mar. 2009), http://www.lawtechnews.com/r5/showkiosk.asp?listing_id=3107598&category_id=27902.
3. See the entry for Shepard's citations on Wikipedia at http://en.wikipedia.org/wiki/Shepard%27s_Citations.

Trial

TECH BRIEF

Get the most out of Google

Daniel J. Siegel

Everyone uses Google. Well, almost everyone. According to reports, between 64 percent and 85 percent of all Web searches are done on Google.[1] Yahoo and Bing, Microsoft's search engine, continue to slowly gain market share, but Google is far and away the most popular. Here are some reasons why:

- Google searches and indexes billions of Web pages, making it more likely that its results will provide the information users want.

- The search engine is easy to use and isn't filled with lots of clutter and distractions.

- Google displays results quickly.

- Google makes it easy for users to distinguish search results from ads and other paid promotional content, which appear in a column on the right side of the page. Also, ads tend to relate to the content of search results and are not distracting.

- Google does not sell placement of search results, meaning a business cannot pay Google to have its Web site display in the top 10 search results.

- Users can view cached (saved) copies of Web pages, often in less time than it takes to display a current page.

- Search results include site-related information to make it easier for users to determine whether a result is what the user is looking for.

- Search terms are highlighted in the results.

- Google continually updates its results, so the information users get is rarely stale.

Although Google is widely used, it isn't necessarily used well. When looking for something on the Web, most searchers rarely do more than type a brief query (a word or short phrase) into the search box on the main Google page. But you can obtain better, more tailored results by tweaking your queries just a little.

Here are some of my favorite search shortcuts and features (sample queries appear in boldface).

Specific phrases. When you place quotation marks around a group of words, like "book shelf," Google will display only results that include that phrase. Of course, by default, the results you get will be based on the order of the words you entered. So if you search for "shelf book" instead, your results will differ.

Similarly, when you place the plus sign in front of one word (without a space), Google will display results that include only the word you typed. For example, a search for **+siegel** will display only those Web pages that include my last name.

Specific pages in a site. The query **[word/phrase] site:** before a URL (a Web address) allows you to search for something within a specific Web site. Google will display any page at that site that contains the searched word or phrase. For example, the query **siegel site:www.justice.org** will return every page or link on AAJ's Web site that references my last name.

Specific file types. Google can display results for a specific word or phrase in a document that exists in particular format, including Microsoft Excel (xls), Microsoft PowerPoint (ppt), Microsoft Word (doc), Microsoft Works (wks, wps, wdb), portable document format (pdf), postscript (ps), rich text format (rtf), Shockwave flash (swf), and Text (ans, txt). For example, **siegel "pdf"** displays only documents in pdf format that contain my last name.

Excluded terms. If you include a minus sign (without a space) before a word, Google knows that your results should exclude Web pages that contain that particular word. Google also knows the difference between the minus sign and hyphenated words. For example, **former presidents –carter** will display Web sites discussing former presidents not named Carter.

Wild-card searches. The asterisk, or wild card, instructs Google to treat the symbol as a placeholder for unknown words and display only the most relevant results. Unlike other programs, in Google the asterisk works only on whole words, not on parts of words. For example, **attorney * jones** will search for Web pages with contain the words "attorney" and "jones" with a word or name between them, like "attorney Cyrus Jones."

OR. If you want results to include one of a few words, use the word "OR" (in all capital letters). Google will display results with one or more of the desired words. You can also use the "|" symbol instead of "OR." For example, **sotomayor OR scalia** or **sotomayor | scalia** will display pages containing one of those names, or both.

Definitions. If you type **define:** at the beginning of a query, Google will return sites that include a definition of the word or words you entered. Note that the definition will be of the entire phrase you entered, not just the first word. For example, **define:summary judgment** will return a list of several Web sites that offer a definition of that phrase.

Words in URLs. The term **allinurl:** at the beginning of a query yields a display of sites whose Web address includes the specific words entered. Try querying **allinurl:justice department** to see what I mean.

Synonyms. If you place the tilde symbol immediately before a word in a query, Google will display Web sites that include synonyms for that word. An example: **~vehicle parts**.

Saved versions of Web sites. Typing **cache:** along with a URL (with no space between the two) will display the page as it appeared the last time you visited it—the cached version. To see your cached version of Google's home page, type **cache:www.google.com**.

Web site links. Placing **link:** before a URL will display pages that have hyperlinks (clickable links) to the specified page. Try this: **link:www.justice.org**.

Similar sites. When you place **related:** before a URL, Google will display Web pages that have content similar to that found at that address. See what a search for **related:www.justice.org** turns up.

Web site information. Using **info:** in a search will yield links to information and to searches about a particular site. For example, **info:www.justice.org** brings up a description of AAJ and a link to its home page, and it offers several AAJ-related search options.

Google Calculator. Google includes a sophisticated built-in calculator that works by entering the desired calculation into the Google search box or the Google toolbar (an add-on to most Web browsers). The calculator can perform basic arithmetic (addition, subtraction, multiplication, and division), advanced math (trigonometry, logarithms), and computation of units of measure and conversions (currency, weights, distances). You can find excellent examples at www.googleguide.com/calculator.html.

Weather. When you type **weather** and the name or zip code of a specific place, Google will display the location's weather. I type **weather 19083** or **weather Havertown, pa** to learn what weather conditions to expect in my area.

General flight information. Use **fly [city] to [city]** in a query to get information about flights from one city to another. You can also use airport codes if you know them. For example, you could type **fly Philadelphia to Chicago** or **fly PHL to ORD**.

Specific flight information. By typing the airline and flight number into Google, you can obtain the current flight status for that flight. An example would be **united 1892**.

Package tracking information. To obtain tracking information about a package or letter, enter the tracking number into the Google search window. Google will determine the identity of the carrier and include a link you can click on to track the item. For example, if you type **1Z 999 999 99 9999 999 9**, the search result will include a link that allows you to track this

package on the UPS Web site.

Google is an extremely powerful, and often underused, research tool. If you've been limiting the potential of your online research by simply tossing a few search words into Google's search bar, try some of these easy delimiters. I guarantee you'll achieve better, faster results. And, really, don't you have better things to do with your time?

The views expressed in this article are the author's and do not constitute an endorsement of any product by *Trial* or AAJ.

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Notes:

1. *See e.g.* Net Applications, *Search Engine Market Share* (Mar. 2011), http://tinyurl.com/9z8kd4; Byron Acohido, *Google's Search Market Share Slips As Bing Rivalry Heats Up,* USA Today (May 14, 2010), http://tinyurl.com/3a6w6hu.

Trial

Dive into the Deep Web

Daniel J. Siegel

When most people want to find some hing on the Internet, they turn to Google, Bing, Yahoo!, or another search engine. In many cases, these sites are sufficient to locate the information you're looking for.

For attorneys and others who are trying to find more specialized informa ion, better options may be available.

There is another dimension to the Internet, often called the "Deep Web," which contains information not regularly catalogued by the Googles of the world.

The Deep Web offers an easier and faster way to get directly to relevant, accurate, and well-rounded sources for legal research in less time and with less frustration.

The Deep Web is the largest part of the Internet, and it's much more expansive than anything Google or Yahoo! can produce in a typical search. The reason is that the common search engines only index (include in their results) Web pages that contain links, such as sites like Amazon. Typical search engines barely scratch the surface of what is available on the Web.

The Deep Web, on the other hand, contains virtually every hing else on the Web. One of the key chroniclers of the Deep Web is Bright Planet (http://www.brightplanet.com/), whose site explains the size and diversity of the Deep Web. When Michael Bergman at Bright Planet wrote a white paper on the Deep Web a decade ago, the amount of information available on the Deep Web was 400 to 550 times greater than what was available on the surface Web.[1] Among Bergman's findings were:

- Deep Web content is highly relevant to every information need, market, and domain.

- More than half of the Deep Web content resides in topic-specific databases.

- Ninety-five percent of the Deep Web is publicly accessible information that is not subject to fees or subscriptions.

- On average, Deep Web sites receive 50 percent greater monthly traffic and are more highly linked to than surface sites, but Deep Web sites are not well known to the public.

- Deep Web sites tend to be narrower than conven ional surface sites and have deeper content.

Bright Planet says it currently estimates that the "total quality content of the Deep Web is at least 1,000 to 5,000 times greater than that of the surface Web."[2]

Although hundreds of thousands of search sites are topic specific, Deep Web directories and search engines perform more broadly based searches and provide topic headings to make research easier and faster.

depth of the Deep Web led one researcher to conclude that the Deep Web holds about 550 billion documents, compared with the 1 billion documents on the surface Web.[3]

A good place to start using the Deep Web is with a "database of databases," also known as a Deep Web directory. Some of these directories are set up like a one-stop shop, listing databases in categories such as "law" and "health," while others simply let you type in a keyword and perform a wider search.

To begin your search of Deep Web resources, you can go to one of the Deep Web sites or an index of multiple Deep Web sites.

Fortunately, there are many good Deep Web directories. Like other sources on the Internet, some are more useful and user friendly than others, and most are free. One of the more popular Deep Web sites is Complete Planet (http://www.completeplanet.com/), a relatively large Deep Web directory powered by Bright Planet that includes many topics. Complete Planet lists multiple categories you can search, including education, law, science, and health. The site boasts that it encompasses more than 70,000 searchable databases and specialty search engines.

Another good starting point is Online College Blog's "100 Useful Tips and Tools to Research the Deep Web," which lists 100 Deep Web sites.[4] While this list is comprehensive, some links include "stale" sites or sites that no longer exist; the latter is a somewhat common problem among Deep Web sites. Because they rely on a more limited number of users than conventional search sites, many Deep Web sites do not have staying power or their content is not updated regularly.

One site that tends to be up to date is the WWW Virtual Library (http://www.vlib.org/), which is well organized and easy to use, but has somewhat limited law-related resources.

If you need scien ific information, consider Scirus (http://www.scirus.com/), which claims to be "the most comprehensive scientific research tool on the Web," with more than 410 million scientific items indexed.

For example, searching for "medical malpractice" at Scirus generated nearly 600,000 hits. The first result that appeared was a 2010 article enti led "Study Debunks Medical Malpractice Myth" from *Dartmouth Medicine* magazine.

Another excellent Deep Web directory is OAIster (http://oaister.world%20cat.org/), which says it can help you "find the pearls" among "millions of digital resources from thousands of contributors." OAIster is a massive collection of resources and a great place to find facts, and its interface is simple compared to similar Deep Web sites.

OAIster selects information from open archive collections and museums worldwide; the site also allows libraries throughout the world to work together to build the catalog. Just entering the word "law" into OAIster provides more than 238,000 results.

A more specific query such as "hospital errors" yields results hat include studies and other information that attorneys need. Conversely, a Google search of this topic leads primarily to news articles, which may or may not provide links to the underlying data.

Infomine (http://infomine.ucr.edu/), which is one of my favorite sites, tends to be more current than some o her sites, and its results are well organized and easy to analyze. Infomine, which boasts that it is a scholarly Internet resource, encompasses numerous subject areas including business, law, economics, and cultural diversity. The site is easy to use and can help you find good information that can be cited. It also clearly delineates which results are free and which require payment.

Another popular option is IncyWincy (http://www.incywincy.com/), which calls itself the "Invisible Web Search Engine." The site is simple to use and its interface is similar to Google's. The results are well organized, although they include more commercial sites than some other Deep Web sites.

For attorneys seeking scholarly articles, Deepdyve (http://www.deepdyve.com/) is a newer site that claims to be the largest online rental service for professional and scholarly research articles. This site claims it has compiled millions of articles from thousands of journals from numerous publishers, including Springer, Nature Publishing Group, and Wiley-Blackwell. Deepdyve charges users a monthly fee but allows them to browse and preview any article for free. If the user wants to view more than the abstract and read the full ar icle, Deepdyve rents the articles for 24 hours or more for as little as 99 cents, far less than many sites charge to purchase similar items.

Using the Deep Web requires a bit more perseverance han tradi ional sites like Google. Never heless, when you find the site you need, you are likely to discover a trove of information that you never knew existed.

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Notes:

1. Michael K. Bergman, *The Deep Web: Surfacing Hidden Value* (Sept. 24, 2001), http://brightplanet.com/images/uploads/12550176481-deepwebwhite%20paper.pdf.
2. Bright Planet, Deep Web FAQs, www.brightplanet.com/the-deep-web/deep-web-faqs.
3. CompletePlanet, Deep Web FAQs, http://aip.completeplanet.com/aip-engines/help/help_deepwebfaqs.jsp.
4. www.online-college-blog.com/features/100-useful-tips-and-tools-to-research-the-deep-web.

Trial

TECH BRIEF

14 web sites you should be using

Daniel J. Siegel

Do you remember when you had to dial up using a contraption called a modem to do research on Lexis or Westlaw? Do you remember how hard it was to find new court decisions or statutes? Not anymore.

Despite the fact that the Internet has changed the way we conduct our daily activities, some lawyers still don't take advantage of many Web sites that can make our lives easier. The best part is that most of them are free.

Here are some of the Web sites AAJ members should be using.

Social Security Death Index (http://search.ancestry.com/search/db.aspx?dbid=3693). Have you ever needed to verify whether someone involved in one of your cases, such as a potential defendant, is dead? The Social Security Dea h Index is the place to begin for that information. This site provides a searchable database of the nearly 90 million records in the Social Security Administration's (SSA) Death Master File. This file is created from internal SSA records of deceased people possessing Social Security numbers whose deaths were reported to the SSA.

The database is updated weekly and provides a wealth of information about the person whose record you are searching for, including

- last name

- first name

- Social Security number

- state of issue

- birth date

- death date

- last residence

- lump sum payments.

The site no longer provides the Social Security number of anyone who died within the past 10 years. And it is no longer free, but it is a valuable resource.

Personal Injury Statute of Limitations (http://law.freeadvice.com/resources/personal_injury_statute_of_limitations.htm). This Web site provides a list of the personal injury statutes of limitation for every state, along with the applicable statutory/code citation. It also links to each state's Web site, so you can verify the data. The site is easy to use and comes in handy when you aren't sure about the statute.

Legal Search Engines (www.virtual freesites.com/search.legal.html). This site provides links to more than 1,000 specialized legal search engines and is organized into roughly 50 categories. It is a great place to start when you know the category of information you want but not the location.

Court Locator (www.uscourts.gov/court_locator.aspx). This site contains an easy-to-use interactive map that allows you to view all the federal court Web sites in a particular state or region, along with links to every court and to key people in the court. No longer do you have to do searches for each circuit or each individual court.

1-800-SERVE-EM (www.1-800-serve-em.com). This commercial site contains one of the most comprehensive databases of the rules for service in the United States and throughout the world. For international service, the site separates countries based on which treaty (if any) governs service. The site also provides specific details about how to comply with each country's requirements.

For example, if you want to serve a party in France, the site explains that the "United States and France are signatories to the Convention on the Service Abroad of Judicial and Extrajudicial Documents in Civil or Commercial Matters, Done at he Hague, November 15, 1965, (Hague Service Convention)" and that "Service in France through the Hague Service Convention generally takes three months, but can take longer." The site provides similar information for other countries.

Cornell University Law School Legal Information Institute (www.law.cornell.edu). A great resource for starting virtually any type of legal research, the site contains tons of informa ion as well as links to numerous other resources, including

- federal law

- the U.S. Constitution

- the U.S. Code

- the Code of Federal Regulations

- the Supreme Cour:

- the Federal Rules

- state law resources

- state statutes by topic

- the Uniform Commercial Code

- uniform laws

- world law

- Wex legal encyclopedia

- CRS Annotated Constitution

- LII Supreme Court Bulletin.

Law Technology News (www.law.com/jsp/law:echnologynews/index.jsp). When you need to know what's happening in he legal technology world, this site is one of the most helpful. It provides up-to-the-minute news, as well as product reviews and other information.

Acrobat for Legal Professionals (http://blogs.adobe.com/acrolaw). The standard and professional edi ions of Adobe Acrobat software contain a wide range of features for attorneys, including Bates numbering, redac ion, and the ability to search and index PDF documents. Acrolaw, the short name for this site, is a compilation of invaluable tips and tricks that help you get even more out of the software. You can also subscribe to the site's newsletter.

LexisNexis Communities Portals (www.lexisnexis.com/community/portal/content/lexisonelandingpage.aspx). Previously known as Lexis One, this site provides a wealth of information, much of it free, but some at a cost, including

- daily updates and RSS feeds

- legal news from a wide range of sources

- blog posts

- free case law searches for the past 10 years of state and federal courts, and the U.S. Supreme Cour: from 1781 to present

legal forms, many of which are free

- podcasts

- free downloads.

The Federal Web Locator (www.lib.auburn.edu/madd/docs/fedloc.html). This site, operated by the Villanova Center for Information Law and Policy at Auburn University, calls itself a "one-stop shopping point for federal government information on the World Wide Web." It is well organized and contains links to hundreds of federal agencies, services, and other entities.

Social Security Online Disability Programs, Listing of Impairments (www.ssa.gov/disability/professionals/bluebook/AdultListings.htm). For Social Security practitioners, this site contains a complete, up-to-date compilation of the Social Security regulations governing claims for disability and Supplemental Security Income benefits.

Is Your Doctor Board Certified? (www.certificationmatters.org/is-your-doctor-board-certified/search-now.aspx). Need to know if a physician (MDs only) is board-certified? This Web site can help you find the answer, along with other information about the doctor in question.

The site does not include osteopathic physicians, however, and the American Osteopathic Association (AOA) does not have a similar Web site. If you believe the physician you are researching is a member of an AOA board, you must first go to the AOA Web site (www.osteopathic.org) and look at the list of specialties there. Then, you need to locate the individual board Web site to obtain specific doctor certification information.

RxList (www.rxlist.com/script/main/hp.asp). When you need to identify a particular pill or discover more information about a medication, this site is a terrific resource.

You can search by name or by the identifying marks on a pill, and then you can read the package insert for the medication. The site contains a wealth of other information about drugs and is an excellent starting point for any pharmaceutical-related research.

Jenkins Law Library— Legal Research Links (http://tinyurl.com/7bgh3fv). The Jenkins Law Library, located in Philadelphia, is the first and oldest law library in the country. Its research links page connects to approximately 400 sites covering law, government, business, medicine, and much more.

For an additional annual fee, you can join Jenkins and have access to a wide range of other services. No matter where you work, the Jenkins Law Library is an excellent source of information.

Without question, the Internet contains a wealth of resources for attorneys and law firms that make performing research easier and more effective. Using just one of the sites mentioned above will save you time and money. So go ahead and get started.

The views expressed in this article are the author's and do not constitute an endorsement of any product or service by Trial or AAJ.

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Feature
May 2006 | Volume 42, Issue 5

Take a (case) load off with the right software

Is your desk hidden under a mountain of paper? Case management software can help you get your records and your schedule under control—and keep them that way. Choose carefully to find the package that's right for your firm.

Daniel J. Siegel

Phone numbers, addresses, trial deadlines, discovery deadlines, time billing, correspondence, medical reports, client records, finances . . . You name it—lawyers need to keep track of it. And they need to do so efficiently.

Not long ago, most of us used index cards, Rolodexes, notebooks, and rudimentary computer programs to stay on top of our cases. Now, it seems that every software company has "the" solution to streamline all this paperwork: case management software (CMS).

Designed to permit convenient storage and retrieval of client and case information, CMS has become a necessity for most law firms. Setting up a CMS program is one of the most important—and may be one of the most expensive—decisions your firm will make.

There are many CMS programs to choose from, and one size does not fit all. A system that works wonderfully for one firm may be disastrous for another. To select the best one, you need to know each program's major features and how well they would meet your firm's specific needs.

Core functions

CMS vendors are reluctant to admit it, but most case management programs perform similar functions, and they all do so pretty efficiently. Where the programs differ is in their emphasis. Some focus specifically on the needs of litigators, others are designed for transactional attorneys, and still others try to be all things to all lawyers. In general, all CMS programs will include

- a **calendar** showing appointments, filing deadlines, trials, court appearances, depositions, "to do" lists, and reminders

- a **database** of the names, addresses, and phone numbers of clients, insurance adjusters, witnesses, opposing counsel, medical providers, and other people connected to the case

- **e-mail**, both external (with full or partial integration with e-mail programs already in use) and internal (either through a CMS-specific program or the firm's own e-mail software), and in all instances, permitting e-mail messages to be stored automatically and linked directly to cases in the CMS database

˜ automated **document creati on**—to e asily produce letters, memoranda, p leadings, settlement packets, medical record s, in vestigative report s, a nd ot her paperw ork—and the ability to link documents and other items with each client's case

˜ **standard and cu stomized r eports**, to g et quic k in formation about s tatutes o f limitations, gov ernment no tice requ irements, c ase aging (how many f iles have been open for various periods of time), case activity (showing a ll the work that has been or needs to be completed for one case, selected cases, or all cases in the database), and potential con flicts o f i nterest; and al so t o creat e mailing li sts an d labels based on various criteria such as zip code, occupation, or voting district

˜ **checklists**, including pre-litigation and litigation "to do" lists

˜ **daily reports** of all items scheduled on a particular date or within a specific time period

˜ **central storag e** of all not es, correspondence, and memoranda for a part icular ca se, allowing easy access and review by all staff

˜ **integration w ith leg al research** services such a s L exis and Westlaw, b usiness and trust accounting software, and time billing software

˜ **remote access** capabilities, so that you and your staff can use the CMS while traveling or at home.

These functions work together to ease the retrieval and sharing of information. Soon after you implement a CMS program, your firm will see significant bene fits. A good program w ill s ave you time and money, simplify routine tasks, attract and retain talented employees who want to work with cutting-edge technology, and i mprove efficiency without increasing staff size. It will become ea sy to g enerate reports, create mailing lists, an d ensur e that a ll do cuments that come from your firm have a professional and uniform look and feel.

These features boil down to four functions that are the hallmark of any good case management program: client information, e-mail, calendars, and document management.

Client i nformation. I n my ex perience, t he more in formation a C MS program can store, the better. Having ke y i nformation—phone n umbers, add resses, background, medical and employment hist ories, and s o o n—at your fingertips makes ever y a spect of hand ling a case easier. A good progr am will als o s tore in formation ab out oppo sing coun sel, insuran ce companies, wit nesses, a nd o ther peo ple rele vant t o your c ases. A nd w hen you get u pdated information—say, an address or new cell phone num ber—making on e change to t he C MS database will automatically update the information for every user in your firm.

E-mail. Most l aw offices use Microsoft Outlook, Novell GroupWise, or similar p rograms. Many also use t hese e- mail systems to maintain t heir calen dars, keep " address books" of contact information, schedule appointments, s et up "to do" lists and progr am re minders, and many other functions. If these are working for you, you might wonder: Why use a CMS system at all?

The answer is simple. Many firms lack a central electronic storage location for this information, and individual staff members often cannot or do not get the information they need f rom an up-

to-date central database. For instance, if a client moves or gets a new e-mail address, only one user may put that change into his or her Outlook database. Even if that person sends out a firmwide e-mail announcing the news, there's no guarantee that everyone else will make the change to their individual databases. That's when you get problems: A staffer may attempt to contact a client at a stale address or, worse, send a birthday card to someone who has died.

Most CMS programs work, at least to some degree, with standard e-mail programs like Outlook and Novell. Make sure you ask every CMS vendor you talk to how its program integrates with your e-mail system and whether it allows easy sharing of users' information.

One product, for example, lets you use either its own proprietary e-mail program or Outlook, but not both. The proprietary program is poor, but if you choose Outlook, the program won't store any case-specific dates (such as depositions, hearings, or trials) in a client's file. Nor does it give you any way to obtain a comprehensive case calendar. When considering a CMS program, ask for a full explanation of how it works with your e-mail system and what you can expect it to do and not to do.

Calendars. The CMS program you choose should let you easily track statutes of limitations and other deadlines. When a user opens up a file, the program should require the user to either enter an injury or incident date—after which the program automatically calculates the date the statute expires—or enter the limitations date manually.

This is an important feature, but at least one program I know of does not include it.

Usually, CMS calendars link to the particular case for which an event is scheduled, allowing any user to see all events related to a case. Users can also see attorneys' and staffers' schedules, making it possible to schedule appointments without making numerous phone calls or sending e-mails to check each person's availability. Again, some programs will not link dates to client files unless you use the vendor's proprietary e-mail software, so you can lose these benefits depending on which system you choose.

A good CMS program lets everyone see each other's schedules, avoiding mix-ups and speeding up the process of setting up meetings. It would let your secretary put appointments into your calendar and let you create your own "private" appointments. Many programs allow you to create "confidential" appointments that either appear only on your personal calendar or provide no details to other staff. This brings up another crucial point: If your firm's lawyers and other employees use portable devices, such as Blackberrys and PDAs, ask the vendor if the CMS works with them.

Document management. Any business, not just a law firm, should have a standard format for letters, memoranda, and other documents, in order to display a uniform, professional image to its clients and the public. CMS can help you develop a standard style for both the appearance and content of these documents. If your firm sends out form letters, CMS document management features ensure that every attorney is providing the most relevant information, whether the document is a welcome letter to a client, a letter of representation to an insurance carrier, or a letter rejecting a case.

Most case management programs let you create documents using information already stored in your system. Some have their own document creation software that works with popular word-processing programs like Microsoft Word and Corel WordPerfect.

When evaluating a CMS program, determine which features are essential to your firm, which ones would be nice to have, and which are unimportant. For example, if your firm uses Word, don't waste time evaluating a program that doesn't integrate with it. If your firm does little or no time billing, it is immaterial whether a CMS program integrates well with time billing software.

Many firms keep their case management and accounting components completely separate from each other, but some offices may want to grant their employees limited access to accounting data (such as case costs). If that's true for your firm, make sure your accounting software will work with your CMS.

If you buy the right case management program, every part of your firm's operations will improve. So will your staff's morale. Lawyers who have set up good case management systems consistently say it was one of the best decisions they ever made.

On the other hand, buying a CMS program in haste can lead to disaster. One midsized firm I know of purchased a program based on the recommendation of one partner, who had used it before. Unfortunately, the software was hard to use, the vendor provided little training, and the system had many flaws. As a result, most of the firm's staffers either don't use it or use it at such a rudimentary level that it is practically worthless.

This story brings up another important point: The biggest problem with your new CMS program may come from within. If members of your staff resist using it because they were never consulted about it, they hate the product, they never learned how to use it properly, or some other reason, it won't do you much good. When a CMS program fails, the culprits are usually lack of planning and poor acceptance in the firm.

Choosing a CMS program requires time, patience, and careful preparation. Don't buy one based on what friends or colleagues say, because if their needs are not the same as yours, you could end up wasting time and money. Also, don't rely solely on a consultant's advice, especially if he or she is affiliated with one CMS vendor.

Remember, too, that CMS may not be necessary for every practice. Some small firms with relatively basic needs may find that Microsoft Outlook, Microsoft Access, Corel Quattro Pro, or a similar program is all they need to manage client information, schedules, and deadlines. These programs can handle basic case management. If your firm has been using one, however, you should evaluate whether it is meeting your needs and will continue to do so— one, three, and five years down the road. Or, perhaps your office is already using an older CMS program that has not been updated in years, or maybe your firm has outgrown the older system. Whatever the reason, it may be time for an overhaul.

Steps to a new system

In most cases, the advantages of utilizing CMS greatly outweigh the advantages of using Outlook or a generic database. In addition, the larger your firm, the less likely it is that you are operating efficiently without CMS. Thus, for most offices an honest assessment will lead to the conclusion that your office needs CMS. What's next?

First, set up a committee that represents a reasonable cross-section of your firm, including attorneys, paralegals, secretaries, computer support staff, and accounting staff. Give the committee a timetable and specific goals. (You could hire a legal technology consultant instead of using a committee, but don't give him or her carte blanche to make decisions.)

The next step is to assess your firm's infrastructure—that is, its current hardware and software. If your firm has more than one location, the committee should consider how the various offices communicate with each other and how each will use the CMS. It must then determine whether a new CMS program will require upgrading the firm's hardware (including networks and servers) and operating systems, and the cost of doing so.

Third, the committee should list the CMS features your office requires. Some firms prefer a stand-alone product, others want one that integrates with its existing programs, and some want a program that does "everything." Decide which will work best for you.

Next, evaluate the options. Most vendors will allow you to test their products with a limited number of users in your office before you make a decision. This is important because not every program operates as advertised, and you need to feel confident that the system you choose can withstand your firm's particular demands.

Also, it can be very helpful to get feedback from a vendor's clients. If a vendor refuses to give you these names, think twice before buying its product. Ask the clients what they like about the program or why they stopped using it. Be sure to ask about the quality of training and customer support, and the long-term costs of using the software (these include annual technical support costs, upgrade fees, and costs for customizing program features).

Finally, your committee should create a plan for implementing the new CMS. A new system will require great amounts of data input, because it is difficult to transfer files from old programs to new ones.

Decide how data will be switched over, and how much of it to include at this stage. Client records and information about current cases, of course, must be input first, but you can probably add other data such as the names of insurance carriers and opposing counsel later as the need arises. Your decision will depend on whether your staff will have access to its older system (but only for looking up historical data), and how much time and money you've allocated to cover the cost of converting data.

One caveat: Once you have implemented the new system and converted the key data, do not allow staff to continue to use your old system. Otherwise, some users may simply "refuse" to use the new system and much of your work will have been for naught.

That's why installing a new CMS requires the entire firm's commitment. Everyone—from the managing partner to the file clerks—must learn the system and commit to using it. Your selection committee can act as an internal "sales staff," explaining why you are installing the new system, how it will streamline work, and the many benefits staffers will get from using it.

Before installing the system firmwide, it is best to perform a test installation for a small group of users. This lets you test the system's efficiency, judge the quality of the data conversion and

data inp ut, and locate an y glit ches. Onc e you are c omfortable with t he progra m, make a schedule outlining when and how the conversion will occur.

Check whether an y of your f irm's at torneys has a trial or o ther sig nificant even t in the n ear future. You don't want to install a new CMS program on the weekend before someone starts a monthlong jury trial.

Also, i t's crucial t o find out what kind of training the vendor o ffers, a nd h ow much it costs. Some CMS vendors pr ovide on-site training, others offer telephone training, while others offer no formal training at all, and the costs vary dramatically. If you choose a program with limited training, factor in the l ikely (and often expensive) c ost of hirin g someone t o provid e on-site assistance.

Training must be mandatory and co mprehensive. Eve ry pers on wh o will u se the CM S must attend the sessions, and t he firm—together with t he vendor—should ass ess each user's skill level before and after training is done. Since lawyers are notorious for making excuses about why they can't attend a class, the firm must emphasize that training is not optional.

Compatibility and customization

There are ot her is sues to consider be fore you w rite a check for your new C MS. On e is compatibility. Besides integrating w ith the Microsoft O ffice Suite and si milar progra ms, some CMS programs work with research services such as Westlaw and Lex is, and ot hers with medical-records retrieval s ervices. Ask vendors whic h p rograms (generally c alled "ad d-ons") work with the s oftware. In many cases, add-ons can be enormous time-savers, and beca use the companies have worked together to develop them, the possibility of program incompatibility is small.

Another important, and often overlooked, aspect of CMS is customization. Very few people use software exac tly t he w ay it was inst alled. Whether the tweak is sm all or large, users make changes so that software works better for them.

Consider almost any piece o f s oftware y ou us e. Did y ou c hange t he bac kground? D id you change the way the items appear on the screen? Did you add features? Did you customize the toolbar? Almost certainly, one of your answers is yes.

The s ame is true for CMS. Few firms use it as it comes "out of the box." When you need to make c hanges, w ill u sers o r the firm's in formation t echnology (I T) depart ment be able to do this—or do you need the software vendor to do it? If the latter, how much will it cost, and how long will it take?

Reports are a g ood e xample. M ost c ase management s ystems can put toge ther standard reports on generic issues, such as statutes of limitations, trial dates, and marketing data. But at some point, your firm will want a report that is not part of the standard package. What happens then? Can you create the report by yourself? Is there a "wizard" (a help feature in the program) to help you along? Can your IT department handle it?

The ans wers to these quest ions mean time and money f or y ou. I f you can eas ily write t he reports, great, but if n ot, how much will it cost to hire s omeone outside the company to do it,

and what is the turnaround time? One CMS program requires users to create custom reports using SQL, a complex database programming language that is difficult to learn. I actually saw users *cry* trying to write these reports. A firm using this particular CMS must rely on its IT staff—if the firm is fortunate enough to have an IT staff and, in particular, a person who knows SQL programming—or on the software vendor or consultants.

This brings up one factor that CMS buyers often overlook: technical support. There are numerous questions to ask. Is there a fee for it? Are you required to sign a contract for it? If you do not purchase technical support as a package, what does the vendor charge for "per-incident" support? Is technical support live, and is it done by e-mail or telephone? What hours is it available? How good is it? Is there a user's manual? If the technical support staff is on the East Coast and you are on the West Coast, or vice versa, will there be periods when no support is available?

Remember to ask who will provide support. How many technical support people does the vendor have? What is the average length of employment for the vendor's support personnel, and how extensive is their training? When you talk with current and former clients of the CMS vendors, ask about their experiences with technical support.

Don't forget to ask about hidden costs. Does the price of the software include "fixes," service releases (periodic upgrades), and upgrades when the vendor issues a new version of the program? If not, what do they cost? How often are upgrades released?

The final hurdle to getting your CMS up and running is more personal. People like to handle their own files with their own software, without anyone else butting in. Don't ignore this issue. When staff members raise problems and complaints, address them. But don't let them get in the way of implementing your CMS successfully.

Case management software can revolutionize your office's day-to-day operations. Buying a CMS program, like any major purchase, requires careful thought, research, and planning. With clear-cut goals and a firmwide commitment to its success, CMS can significantly increase your firm's efficiency, productivity, morale, and bottom line.

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CASE MANAGEMENT
IN THE
CLO

Despite the convenience and ease of document storage and retrieval, cloud-based case management software can create challenges. Law firms must evaluate security, ownership costs, and other issues before making the switch.

By || **DANIEL J. SIEGEL**

You name the type of information, and lawyers need to know and track it, and do so efficiently. This includes calendars, clients, email, phone numbers, addresses, trial deadlines, discovery deadlines, time billing, court documents, statutes of limitation, accounting, correspondence, and conflicts of interest.

Before they had computers, lawyers used index cards, Rolodexes, and notebooks to keep track of this information. Eventually, many offices graduated to rudimentary computer programs. More recently, lawyers have begun to use more advanced software, generally called case management software (CMS),[1] although many law firms still cling to less high-tech systems.

As technology evolved, so did CMS, which has been transformed into a comprehensive system for tracking every aspect of a client file from intake through litigation to trial. And with the advent of "cloud computing," law firms' use of CMS continues to change. Attorneys need to understand the many major features of cloud-based CMS, the issues to consider when purchasing a CMS system, and a roadmap for implementing the system successfully.

Designed to permit convenient storage and retrieval of client and case information, CMS products often include all or many of these features: a centralized office calendar that tracks appointments, deadlines, trial and court appearance dates, and depositions; comprehensive workflow monitoring using to-dos, reminders, and other similar features; a centralized database of clients, parties, insurance companies, adjusters, witnesses, judges, counsel, medical, and other providers; integrated external email (generally using Microsoft Outlook); law firm email and other interoffice messaging systems; automated document creation (generally using Microsoft Word, Corel WordPerfect, and related software); standard and custom reports, including statutes of limitations, case aging, conflicts of interest, and filing; deadlines, such as governmental notice requirements; mailing lists and labels (based on various criteria, such as zip code and occupation); and remote access capabilities, permitting staff and partners to use the CMS while traveling or at home.

These CMS programs have become all-encompassing, allowing lawyers to track virtually every aspect of their files in one place. Not too long ago, concepts such as the Internet, smartphones, and iPads, which allow lawyers to access information remotely, were unheard of.

Because of the rapid growth of mobile technology, law offices no longer have to rely exclusively on their internal networks as the sole method for storing and sharing data. In particular, remote access and cloud technology now permit law firms to view their case data from anywhere and to share information regardless of where staff is located.

What Is the Cloud?

The term "cloud computing" refers generally to the concept that information (whether it's client-related, financial, or any other type of data) and related services are delivered and stored on the Internet, also known as the "cloud." The information is not stored at the firm's physical location, but is stored on servers (central computers) at another location.

While cloud computing seems mysterious to some, the concept has been around for a long time. When email first began and services such as AOL and CompuServe were popular, email was

not stored on the user's computer; it was saved on the email provider's computers. That is essentially how cloud computing works—your data are stored on someone else's computers.

Nevertheless, there are differences beyond where your data are stored. Primarily, those differences are technological and ethical. As with all other forms of client data storage, using the cloud to store client information implicates the ABA Model Rules of Professional Conduct, as well as its state counterparts. Various national, state, and local ethics and professional guidance committees have authored opinions designed to assist attorneys who plan to use or are using the cloud.[2] While many considerations are the same for onsite or other traditional storage methods, attorneys and law firms still must evaluate the differences between the cloud and other methods.

Traditional computer networks are "hardwired," which means that every user is connected to each other by computer cables. These networks are managed internally, without relying on any other companies to make changes in the setup or infrastructure. Outages and other related problems are not an issue because you don't need the Internet to access your data. In addition, provided your firm has appropriate security, it is unlikely that a hacker will access it. Since the data are generally accessible only to your staff, you don't have to worry about considerations such as the laws where the data are stored, concerns about who owns your data, data-breach policies, and alternative methods of connecting when there is an outage.

Pros and Cons

Using the cloud has advantages. In many cases, it is more secure than office networks. You can easily expand the network with the cloud as the firm grows. Finally, many cloud computing

> **Using the cloud has its advantages. In many cases, it is more secure than office networks. You can easily expand the network with the cloud as the firm grows.**

solutions allow your staff to access data from virtually anywhere.

Security. Despite some skeptics' legitimate concerns, the cloud is generally more secure than a typical law office. Reputable cloud service providers use sophisticated data centers equipped with multiple levels of security designed to prevent unauthorized access to firm data. These servers have other features that offer higher levels of security than in-office systems, including automatic backup systems, duplicate/redundant servers, and other measures that most law firms either don't have or can't afford.

Universal data access. With the cloud, your data are stored on someone else's server, which means that your staff can access the information no matter where they are—all they need is an Internet connection. They can use a laptop, smartphone, or an iPad. Regardless of the device and the location, your staff can get critical information and make important decisions.

On the other hand, if you were using a traditional desktop-based application, you would have to provide offsite access through a remote desktop connection or a program, such as GoToMyPC, for users to work on the firm's data while

away from the office. Some of these solutions do not allow access by some of the more common types of mobile technology. For example, not all remote access methods are compatible with iPads or Android tablets.

Cost of ownership. One of the reasons many firms have chosen cloud-based CMS is that the cost of ownership is often less than for traditional systems. This is a difficult reason to quantify, however, because of numerous "variables," some tangible, some intangible. The most common intangible is the value that many firms feel when their data are being stored at their own offices. Of course, that does not guarantee that there will not be a catastrophe (like a fire) or that their data will not be breached. What is hard to explain is that in many cases, cloud solutions are actually as secure as or more secure than in-office networks.

The tangibles are easier to quantify. First, firms must compare the costs of purchasing traditional software, as well as setting up and maintaining their own physical network, to cloud-based software expenses, which often include a purchase price, as well as monthly or other subscription-based fees.

Second, firms must consider the cost

of support, both for the network and for whatever software will be used. Third, law offices must factor in the additional costs of remote access, including the need for high-speed Internet access and providing staff with access at home and other remote locations. Finally, firms must evaluate the "hidden costs" of maintaining their internal infrastructure. While firms may not need to upgrade individual workstations as frequently with a cloud-based system as with a traditional one, they still must consider the baseline costs associated with cloud-based products and compare them with the cost of traditional onsite systems.

Firms need to be careful. Some products cost more on an annual basis than comparable desktop-based products. It is important for prospective customers to compare the total cost of licensing and ownership of each system to avoid "sticker shock."

Cloud-based CMS is a service. When you buy cloud-based products, you are generally purchasing access to an online service and not a physical product as you would with traditional software. Traditional CMS is installed on every user's computer and is licensed on an annual basis, with updates provided based on the developer's guidelines. Cloud-based software either "plugs in" to other products on your computers, such as Microsoft Outlook, or is accessed remotely. In most cases, you pay for cloud-based CMS by the user or by usage, such as the amount of data you store on the CMS provider's servers.

Of course, there are also issues about how easily you can transfer your data should the firm discontinue using the cloud-based product and what happens if a provider goes out of business. These are important issues that should be addressed in your contract with the service providers before signing or agreeing to the Terms of Service, the

document that outlines each party's legal rights and responsibilities.

Less versatility. Many cloud-based CMS products do not have as many features as traditional desktop-based products. As a result, some features, such as integrated calendaring or document creation and management, may not work with the versatility of some onsite products. For example, it is critical to know how the software maintains document versions, how easily you can route items between users, and whether the software's integration with Microsoft Outlook could cause performance issues as your firm grows.

Think Before You Switch

There are many benefits to moving your firm to cloud-based CMS, yet the products are not the panacea that some claim. Make sure that any cloud-based software is compatible with Outlook and other products your firm is currently using.

Assess your firm's infrastructure—both hardware and software—to determine what you have and what changes will be necessary to make the move to the cloud go smoothly. Evaluate your options. Test drive the products you are considering so that you can be confident that the CMS you select will meet your firm's short- and long-term needs. Also, get references from the vendor and make sure you know all of the costs, including annual fees, upgrade fees, and costs for customizing program features.

Don't assume that a cloud-based product is the best alternative. While it may be, sometimes traditional products have better features and are more appropriate. In addition, many traditional products now offer cloud-based solutions or web-based versions that may fit your firm's needs even better. Evaluate them all, and then make an informed decision.

There is no doubt that cloud-based

CMS can revolutionize your office's day-to-day operations. Buying a CMS program, like any major purchase, requires careful thought, research, and planning. With clear-cut goals and a firm-wide commitment to its success, cloud-based CMS can increase your firm's efficiency, productivity, morale, and bottom line. 🔲

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NOTES
1. *See* Daniel J. Siegel, *Take a (case) load off with the right software,* Trial 42 (May 2006), which discussed the issues and concerns that firms should consider when purchasing case management software. Most of the non-cloud-based considerations, and even many of the cloud-based considerations, remain the same.
2. *See e.g.* Pa. Bar Assn. Comm. on Leg. Ethics & Prof. Resp. Formal Op. No. 2011-200 (Nov. 2011); Iowa Bd. of Prof. Ethics Op. 11-01 (Sept. 9, 2011); Mass. Bar Assn. Comm. on Prof. Ethics Op. 12-03 (May 2012). All of these conclude that attorneys may use cloud computing, provided they take reasonable safeguards to protect confidential client information.

TRIAL

Old software, new tricks

Keeping a law office equipped with the latest technological gizmos is an expensive—and nearly impossible—task. Before you consider that next system upgrade, make sure you're getting everything you can out of the software you already have.

Daniel J. Siegel

Windows runs your computer, and Word and WordPerfect are the programs you use to type documents. Internet Explorer helps you get around the Internet, and PowerPoint is what you use to do courtroom presentations. We all know what these programs are and what they do, but you may not know all that they can do for you.

Most lawyers never use the software programs installed on their computers for more than the basic tasks they can perform, nor do they ever try to discover some of the other things the programs can do to make their computing lives easier. That's a mistake.

All software programs have shortcuts designed to make using them easier. For example, you can customize most software programs by right-clicking on their toolbars and selecting *Customize*. This will give you a dialogue box with lists of various program features. Highlight the particular feature you want to put on the toolbar by left-clicking on it, then drag and drop it wherever you want it on your toolbar. Putting commonly used shortcuts on your toolbar will put the feature right in front of you and save you a great deal of time.

Here are some other tips on how to get more functionality from common software products you already have. But don't stop there. Instead, dive in and explore your software to find even more shortcuts on your own.

Windows XP

How much time do you spend searching your computer for program icons you use all the time? Instead, put those icons at your beck and call.

Take control of the taskbar. If the taskbar at the bottom of your desktop is overflowing with icons you never even look at, you can easily tame that beast. Although Windows XP automatically hides the icons it deems to be inactive, you can tell it to always hide or display whichever icons you select.

- Right-click on the Start menu.
- Select *Properties*.
- Click on the *Taskbar* tab.
- Click *Customize* to see a list of all your current and former taskbar icons.
- Hold the cursor over the icons and use the drop-down menu to change the ones you want to *Always Hide* or *Always Show*.

Place icons on your desktop. You can also place a shortcut to any program or file on your desktop.

- Locate the program or file icon in *My Computer* (available in the Start menu).
- Right-click on it and select *Send To.*
- Highlight *Desktop (create shortcut)*, and a shortcut to the program or file will appear on the desktop.

Create your own application toolbar. Put the icons you regularly use in one list.

- Create a new folder on the desktop by right-clicking on an empty spot, selecting *New > Folder*, and naming the folder "My Apps" (or whatever you choose).
- Fill the new folder by right-clicking on a desktop icon you want in the new toolbar and selecting *Copy*; then right-click on the new folder and select *Paste*. Repeat these steps for each icon you want to add.
- Right-click on the taskbar and select *Toolbars > Select New Toolbar*.
- Highlight the folder you created and click *OK*—all the shortcuts will be placed in a My Apps list on the taskbar, allowing quick access.

Microsoft Word

Almost everyone uses Word and—probably—so do you. It's a program that can be irritating, but you can eliminate some of the most common annoyances.

Change how the document looks. Reading a document in Word's editing mode, called Track Changes, can be irritating if it has been marked up extensively. Just turn this feature off—it's easy to turn it back on if you need it. Click on *Tools* and make sure *Track Changes* is not highlighted.

Another annoyance: e-mail attachments often don't appear as they were formatted to appear when you open them in Word. This can make it hard to edit the documents. To fix this, turn off the Reading Layout:

- Click on *Tools > Options*.
- Select the *General* tab.
- Uncheck *Allow starting in Reading Layout*.

Enable Click and Type. If you set this feature, you can double-click anywhere in a document—to fill out a form, for example—and begin typing. To enable it, go to *Tools > Options > Edit* and check the *Enable click and type box*.

- In the View menu, select either the *Print Layout or Web Layout* view.
- In the document you're working on, move the pointer to a blank area where you want to insert text, graphics, or a table; double-click to enable the Click and Type pointer.[1]
- Double-click and start typing text or insert an item as usual.

Turn off automatic correcting features. Word calls these features AutoFormatting and AutoCorrect. They often make changes you do not want or like. To halt the ones you hate:

- Go to *Tools* and pick *AutoCorrect Options*.
- Select the *AutoFormat As You Type* button.
- Uncheck the boxes for the features you don't like (many Word users like to leave *Ordinals, Fractions*, and *Hyphens* checked).

Make friends with styles. If you're like me, you either ignore styles or use them sparingly, often lamenting Word's lack of the handy Reveal Codes feature of WordPerfect. But if you use a certain format over and over—for example, if you always indent and single-space citations and quotations—creating a new style to do this automatically is relatively easy, and it saves you from having to reformat your paragraphs every time you prepare a brief. To create a new style in your document:

- Select the text from which you want to create your style (make sure the paragraph and fonts are formatted the way you want them to appear).
- Press *Ctrl + Shift + S* and fill in the name of your new style in the highlighted box that appears on your toolbar.
- Press *Enter*.

Then, every time you want to format a paragraph a certain way, just place your cursor in the paragraph and either

select the style you want from the drop-down box on your toolbar or go to *Format > Styles* and select a style from the menu that opens. Your paragraph will instantly convert to the style you want.

Corel WordPerfect

Here's something WordPerfect can do that Word can't.

Print directory listings. One of the more frustrating aspects of Windows is how difficult it can be to print a list of files in a particular directory. Windows just does not allow it. But WordPerfect does.

- Go to *File > Open*, as you would if you wanted to open a saved document.
- Navigate to the directory you want.
- Click on *File > Print File List*.

You will then have the option of printing the list of files on your printer, viewing it in WordPad, or copying the list to the Windows Clipboard and pasting it into the application of your choice. If you highlight a few file names, you can print only those entries. Or you can print the entire list and include a listing of the subdirectories displayed. Unfortunately, you can't include the folder trees for the subdirectories; you must print each subdirectory by itself.

Word and WordPerfect

Here's a fix for another frustration your word-processing program might be causing you.

Create perfect captions. Formatting the captions of pleadings can be annoying. Most people type the caption using tabs, spaces, and anything else they can think of to locate the names of the parties with colons (or other markings) centered between the party names and the name of the court and the docket number. The information will often move depending on how long the names are. You wind up spending more time formatting the document than you do typing its substantive content.

Creating a borderless table with separate sections for each piece of information is an easy solution. In either Word or WordPerfect, create a table with three columns and three rows that looks something like the illustration above (this is step one). Then enter the required information (step two).

Finally, remove the borders (step three). In Word:

- Remove the table borders by highlighting the entire table.
- Right-click and select *Borders and Shading*.
- On the *Borders* tab, click *None*.

In WordPerfect:

- Remove the borders by highlighting the entire table, right-clicking, and selecting *Border/Fill*.
- Click each Cell Lines box and change the entry to an "X," then click *OK*.

To line up the "v." in the second row of the table, in either program:

- Highlight the cell where the "v." appears.
- Set a tab stop (go to *View > Ruler* and move the top marker on the horizontal ruler) where you want the "v." to appear in the cell.

Your caption will then print as it appears in step three.

Internet Explorer

Simplify your research by organizing how you store bookmarks.

Use the Links toolbar. If you plan to visit a site more than once, you should save it. Most Web surfers who save URLs (such as www.justice.org) simply add them to their Favorites folder and are left with a giant collection of

listings that is difficult to search. One of the most helpful, and least used, features of Internet Explorer is the Links toolbar, which allows you to store countless Web site addresses and find them easily.

To enable the toolbar:

- Click on *View > Toolbars* and make sure *Links* is checked.
- Click and drag the Links toolbar to its own line.
- Delete all the preselected entries put on the toolbar by the manufacturer (right-click on an unwanted icon and select *Delete*).

Next, you need to create folders for the categories you'd like to file Web addresses in.

- Go to *Favorites > Organize Favorites*.
- Highlight the Links toolbar.
- Click on *Add New Folder* and type "Legal."
- Add other new folders of your choice.[2]
- Click *Close*.
- When you arrive at a Web site you want to save, click *Favorites > Add to Favorites* and select the folder you want to put it in from the drop-down menu next to *Create in*, or create a new folder for it (or subfolder in the category you've selected) by clicking the *New Folder* button.

PowerPoint

Spend less presentation time fussing with the program by learning a few shortcuts.

Navigate slides. If you're in the middle of a presentation and need to jump forward or backward to another slide, it's embarrassing to have to move through all your slides to get there. Instead, while in *Presentation* mode, just type the slide number you want to go to and hit *Enter* to jump right there.

To make doing this easier, print a thumbnail list of all your slides for a handy reference with each slide's number included.

To print the thumbnails, choose *File > Print*. In the Print menu box under *Print what*, select *Handouts* from the drop-down menu, then set the number of slides you want to appear on a page.

Shorten your presentation. Have you ever been in a situation where you have to end a presentation immediately —even though you have 18 slides left? Assuming the last slide is your conclusion, just hit the *End* key and you'll jump right there. Don't make the mistake of hitting the *Home* key, which will take you to your first slide.

Run other programs from your presentation. Presenters are not limited to using only PowerPoint's pictures, text, and special effects. In a PowerPoint presentation, you can link the slides to other programs and have a far more versatile presentation.

- Highlight the text on a slide that you want to link to another program.
- Right-click and select *Action Settings*.
- A dialogue box will appear that allows you to hyperlink to another slide, run a program, or play a sound.
- Check the desired feature to link, then click on *Browse* to select the program's start-up file.

The program also offers two options. With Mouse Over, when your mouse hovers over the spot, the program begins; with *Mouse Click*, you have to click on the link to activate the link, sound, or program. I suggest using the default *Mouse Click* to avoid inadvertently starting something you weren't ready for.

Of course, test the link before giving your presentation, and verify that your firewall or antivirus software does not prevent the link from working properly.

Microsoft Outlook

Better organize how this program manages your life.

Use the Reading Pane. By enabling the Reading Pane (preferably on the right), you can view most of your e-mail messages without having to double-click and open the messages.

- Click *View*.
- Select *Reading Pane > Right*.
- Resize the windows (click and drag their borders) for the view you like best.

You can even mark the messages as "read" after you see them:

- Click *Tools > Options*.
- Select the *Other* tab.
- Click the *Reading Pane* button.
- Check *Mark items as read when viewed in the Reading Pane* and enter how long you want to wait before marking items.
- You could also have items marked as "read" when you move to the next message by selecting *Mark item as read when selection changes*.

Move easily between folders. These keyboard shortcuts will help you switch among Outlook's functions without reaching for the mouse:

- Ctrl + 1—Inbox
- Ctrl + 2—Calendar
- Ctrl + 3—Contacts
- Ctrl + 4—Tasks
- Ctrl + 5—Notes

Create a new contact without retyping information. Most people wastefully retype all a contact's information when creating a new entry. But if you have already created an address card for another person who works at the same company, you don't have to retype the common information.

- Open the address card you already have for someone who works at the company.
- Click on *Actions > New Contact from Same Company*. A new address card will appear with all the person's basic company information already filled in.

Adobe Acrobat

You can now do more with pdf documents in the Reader program.

Spiffing up the interface. The free Adobe Reader is installed on virtually every computer, but the latest version allows users to do even more.[3] You can customize the program by clicking on *Edit > Preferences*. Adobe Reader then presents you with a host of customization options, ranging from how documents look on the screen to whether you will use its new audio reader function.

Moving text. Although you cannot edit a pdf document in Adobe Reader the way you edit a Word or WordPerfect document, you can copy text and pictures from many pdf documents and use them in other programs.

- Click on *Select Tool* on the toolbar at the top.
- Highlight the text or pictures you want.
- Select *Edit > Copy*.
- Open the other program you want to paste the information into and select *Paste* (Ctrl + V).

The information you copied should appear, although you may have to do some additional formatting.

Filling in and saving forms. Until now, Adobe Reader users could fill in forms but never save them, so if you wanted to preserve a form you had to print it. With Version 8, you can save the document electronically. However, the person who created the pdf form must enable usage rights (by going to *Advanced > Enable Usage Rights* in Adobe Reader); you cannot change these settings yourself in Adobe Reader.

Most programs on your computer include numerous keyboard shortcuts and other features designed to make using them easier. All it takes to discover these hidden advantages is a bit of curiosity and the willingness to try

something new.

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Notes

1. Move the pointer a little and its shape will show how the item will be formatted. For example, if you clicked on the right side of the page, the pointer shape will provide the *Flush Right* icon.

2. You can include subfolders using the same steps. My Links toolbar, for example, has a main folder named Legal, with subfolders for Federal Courts, State Courts, and Organizations. To create a similar setup, simply highlight the Legal folder before you click *Add New Folder*. To receive a copy of my legal links toolbar with detailed installation instructions, send an e-mail to trial@techlawyergy.com.

3. If you have not upgraded to Version 8.1, do so now by going to www.adobe.com.

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