South Carolina Bar
Continuing Legal Education Division

The Busy Lawyer's Guide to Legal Technology, with Wellness

featuring Barron K. Henley

Friday, December 13, 2019

presented by
The South Carolina Bar
Continuing Legal Education Division

http://www.scbar.org/CLE

SC Supreme Court Commission on CLE Course No. 197138

The Busy Lawyer's Guide to Legal Technology, with Wellness

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This program qualifies for 6.0 MCLE Credit Hours, including up to 1.0 LEPR Credit Hour and 1.0 SA/MH Credit Hour.
SC Supreme Commission on CLE Course #: 197138

8:30 a.m.	**Registration & Continental Breakfast**
8:55 a.m.	**Welcome and Opening Remarks**
9 a.m.	**A Lawyer's Guide to PDF Files**
10 a.m.	**Ethical Legal Tech Security Measures Every Lawyer Must Take**
11 a.m.	**Break**
11:15 a.m.	**Microsoft Word Power Tips for Legal Users**
12:15 p.m.	**Lunch (provided)** *Sponsored by the South Carolina Bar - Solo & Small Firm Section*
1 p.m.	**Champagne Technology on a Beer Budget**
2 p.m.	**60 Legal Tech Tips, Tricks, Gadgets and Websites in 60 Minutes**
3 p.m.	**Break**
3:15 p.m.	**Stress and Anxiety and the Practice of Law** *Shannon Furr Bobertz, Esq.* *S.C. Department of Natural Resources – Columbia*
4:15 p.m.	**Adjourn**

The Busy Lawyer's Guide to Legal Technology, with Wellness

Speakers

Barron K. Henley, Esq.

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Shannon Furr Bobertz graduated from the South Carolina School of Law school in 2002, cum laude. While in law school Shannon was an Associate Articles Editor on the SC Law Review and a member of the Wig and Robe. After graduation, she clerked for Justice Costa Pleicones on the SC Supreme Court. After her clerkship, she went into private practice focusing on civil litigation and municipal law with a private firm, where she was a partner. Shannon joined SC Department of Natural Resources in 2013 and was appointed Chief Counsel in 2014. Shannon is a member of the American Board of Trial Advocates (ABOTA) and was chosen as a Rising Superlawyer in 2013. Shannon was awarded the Silver Compleat Lawyer Award by the USC School of Law in 2014. She was selected by The State Newspaper as a recipient of the "20 Under 40" award in 2015. She was also awarded the Meritorious Service Award in 2018 by the Director and Chairman of the DNR Board for her work for DNR. She served as a SCDNR Deputy Law Enforcement Officer from 2013-2019. Shannon completed the National Conservation Leadership Institute (NCLI) in 2019. She also served as a Bar Examiner and an Adjunct Professor at the USC School of Law. Shannon served on the SC Bar Wellness Task Force, and is a regular practitioner of yoga. She currently serves as a part time municipal judge for the City of Cayce.

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A Lawyer's Guide to PDF Files

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A Lawyer's Guide to PDF Files

I. INTRODUCTION:

A. PDF (Portable Document Format) Files: PDF is a file format that captures all elements of a printed document as an electronic image that you can view, navigate, print, or forward to someone else. PDF files are created using Adobe Acrobat, Acrobat Capture, or similar products. To view and use the files, you need the free Adobe Reader, which you can easily download for free (www.adobe.com). Once you've downloaded the Reader, it will start automatically whenever you want to look at a PDF file. PDF files have become the de-facto standard method for distributing electronic forms on the Internet.

B. A Little History: PDF started off on the dream of a paperless office, as the pet project of one of Adobe's founders, John Warnock. Initially it was an internal project at Adobe to create a file format so documents could be spread throughout the company and displayed on any computer using any operating system. In his paper which led to the development of PDF, John Warnock wrote: 'Imagine being able to send full text and graphics documents (newspapers, magazine articles, technical manuals etc.) over electronic mail distribution networks. These documents could be viewed on any machine and any selected document could be printed locally. This capability would truly change the way information is managed.' Warnock's prediction proved prescient.

The first time Adobe actually talked about this technology was at a Seybold conference in San Jose in 1991. At that time, it was referred to as 'IPS' which stood for 'Interchange PostScript.' Version 1.0 of PDF was announced at Comdex Fall in 1992 where the technology won a 'best of Comdex' award. The tools to create and view PDF-files, Acrobat, were released on June 15, 1993.

If you think Adobe Acrobat is expensive today, keep in mind what Adobe originally charged for tools to create PDF files. Acrobat Distiller was available in personal and network versions, priced at $695 and $2,495 respectively. You even had to pay $50 for Adobe Reader. This approach didn't exactly turn PDF into a popular format overnight. Later on, Adobe dropped the price of Acrobat and launched the free version of Adobe Reader.

C. PDF Released As Open Standard: On July 1, 2008, Adobe released PDF as an open standard to be published by the International Organization for Standardization as ISO 32000-1. Also in 2008, Adobe released a Public Patent License to ISO 32000-1 granting royalty free rights for all patents owned by Adobe that are necessary to make, use, sell and distribute PDF compliant applications.

"'By releasing the full PDF specification for ISO standardization, we are reinforcing our commitment to openness', says Kevin Lynch, Chief Technology Officer at Adobe. 'As governments and organizations increasingly request open formats, maintenance of the PDF specification by an external and participatory organization will help continue to drive innovation and expand the rich PDF ecosystem that has evolved over the past 15 years.'"[1]

D. What Is PDF/A? PDF/A (archival PDF) is a type of PDF that is used for the long term storage of documents. Standard PDF files rely on external information, such as font libraries, to be read, and this can pose problems for retrieval far in the future. PDF/A files, on the other hand, have all information embedded in the file and do not rely on external information. This is useful for archiving, as anyone with a PDF/A reader can view a PDF/A file without the need for appropriate external information. The drawback to this is that because all information must be embedded in PDF/A files, they tend to be larger than regular PDF files.[2] For a more detailed description of PDF/A, see the description provided by the Sustainability of Digital Formats Planning for Library of Congress Collections here: http://tinyurl.com/4wfwazy. PDF/A matters to you because many of the electronic case filing systems require PDF/A or may require it in the future.

E. Why Lawyers Are Using PDFs:

1. **Worldwide Standard**: PDFs have become the worldwide standard for the distribution of electronic documents. Since they are so common, it's extremely uncommon for the recipient of a PDF to be unable to open it.

2. **Protect the Document**: Adobe Acrobat allows you to protect a document so that the text cannot be altered. You can also control who may access it, whether it can be printed or opened, etc.

3. **Collaboration**: Today, Adobe Acrobat makes it easy to solicit feedback, comments and proposed changes to a PDF document. This makes PDFs ideal for negotiating the language of a documents and the like.

4. **Easy Creation**: You can create PDFs from any computer program that will print (Word, WordPerfect, etc.). You can also create PDFs with a scanner.

5. **Easy Combination**: PDFs can be compiled from many sources and any PDF can be combined with another.

[1] PDF Format Becomes ISO Standard, July 2, 2008. See http://tinyurl.com/nbmbcrz.
[2] What Is PDF/A? CVISION Technologies, Inc. See http://tinyurl.com/lxqnsag

6. **Forms**: Adobe Acrobat Professional allows you to create your own fillable forms; and makes it easy to collect the data that is entered into them.

F. **Microsoft Office and Acrobat Integration**: Acrobat has a slick integration with Microsoft Office (adds buttons and makes creating PDFs easier), but not every version of Acrobat integrates with every version of Office. Even if you don't have versions of Office and Acrobat that integrate, you can still create PDFs from within MS Office by following the steps described in paragraph VI.A. below. You just won't be able to create PDFs in the manner described in paragraph VI.B. below. Here are the versions that integrate:

1. Acrobat 8 is compatible with MS Office 2003

2. Acrobat 9 is compatible with MS Office 2003 & 2007

3. Acrobat X is compatible with MS Office 2003, 2007 & 2010

4. Acrobat XI and DC is compatible with MS Office 2003, 2007, 2010 & 2013

5. Acrobat DC is compatible with MS Office 2007, 2010, 2013, 2016, 2019 and Office 365

II. <u>TOOLS FOR CREATING PDFS</u>:

A. **Basic Types of PDFs**: There are two basic types of PDFs – Image Only and Searchable.

1. **Image Only PDFs**: This type of PDF is visually an exact replica of the original document (whether the original document was electronic or paper-based), but it contains no text which could be searched by Acrobat or any other program. This is usually the type of PDF that you get when you scan a document using a copier, scanner or multifunction machine.

2. **Searchable PDFs**: This type of PDF is also an exact replica of the original document, but it also contains a hidden layer of text so that you can search for any word on any page. PDFs created from other computer programs electronically are searchable by default. In other words, if I create a PDF from a Word or WordPerfect document, an Excel workbook or an email, they are always searchable. As mentioned above, PDFs created by scanning can be, but are not always searchable. The software you're using to scan will determine whether you can create searchable PDFs. So that you can easily find the PDF documents you're looking for, you want to use searchable PDFs.

B. **What Can Be Converted To A PDF**: If you have the right hardware and software, you can create PDFs from just about anything, including electronic files (Word,

WordPerfect, PowerPoint, Excel, etc.), paper documents, web pages, email, even something you've copied to your computer's clipboard.

C. **Programs You Can Use**: In order to create PDFs from anything, you'll need the appropriate software. There are far more than I've listed below, but the following are probably the most popular options.

1. **Adobe Acrobat Pro DC**: There are two flavors here: Acrobat DC Pro "with services" which you can only rent; and Acrobat DC Pro desktop which you can buy. You can rent DC Pro with Services for $14.99/month with an annual commitment or $24.99/month if you want month-to-month. Only Pro is available for the Mac. See https://adobe.ly/2XiK1k2 for pricing and product information.

2. **Adobe Acrobat Standard DC**: There are two flavors here: Acrobat DC Standard "with services" which you can only rent; and Acrobat DC Standard desktop which you can buy. You can rent DC Standard with Services for $12.00/month with an annual commitment or $22.99/month if you want month-to-month. Standard is not available for the Mac. See https://adobe.ly/2XiK1k2 for pricing and product information.

3. **Kofax/Nuance Power PDF Advanced**: Matches features of Acrobat Professional for only $179.00. See http://bit.ly/33NbdK3.

4. **Kofax/Nuance Power PDF Standard**: Matches features of Acrobat Standard for $129. See http://bit.ly/2NKfKHv.

5. **Nitro Pro Included with Nitro Productivity Suite**: Matches the features of Acrobat Professional. This is $159.99, and you can buy it here: http://bit.ly/2CLjYsi.

6. **Foxit PhantomPDF for Business**: Very strong feature match with Acrobat Pro for $159. Also includes a 30 day free trial. For more information, see https://www.foxitsoftware.com/shopping/.

7. **Foxit PhantomPDF Standard**: Strong match with Acrobat Standard for $129. Free trial - for more information, see https://www.foxitsoftware.com/shopping/.

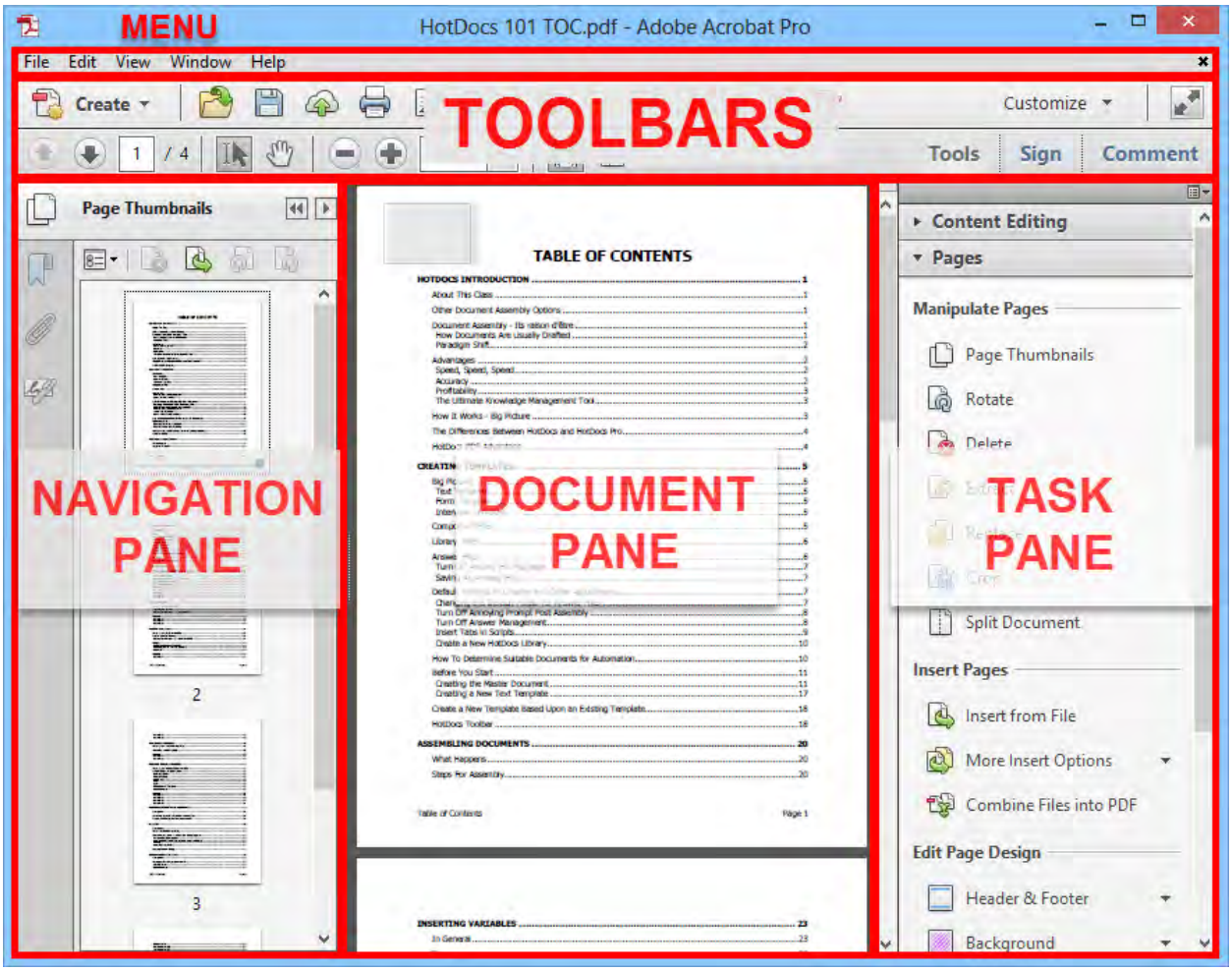
8. **pdfDocs Pro by DocsCorp**: Very strong feature match with Acrobat Professional and recently completely revamped. A 12 month subscription is the only way to buy it and it's $107 annually. See http://bit.ly/2Q1rKDa for more information.

9. **PDF-XChange Pro**: Fantastic product only missing redaction compared to Acrobat Pro. Only $93.50 - see http://tinyurl.com/3ukmgr5.

D. **Acrobat Version Differences**: A matrix of the features of Acrobat DC is attached as **Exhibit A** on page 87. A comparison of Acrobat X, XI and DC is attached as **Exhibit B** on page 88.

III. THE ACROBAT X AND XI INTERFACE:

A. **Main Window**: The main window has 5 different sections: Menu, Toolbars, Navigation Pane, and Task Pane.



B. **Main Functionality of Each Section**:

1. **Menu**: Open, Close, Send, Create PDFs, Security, Find, Search and Views.

2. **Toolbars**: Quick access to PDF functions, can add or remove commands.

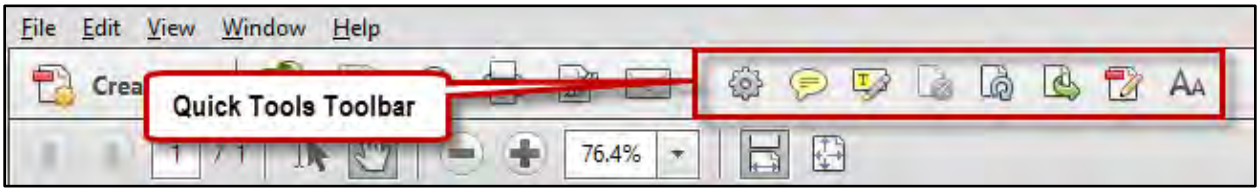
3. **Navigation Pane**: Thumbnails, Bookmarks, Attachments.

4. **Task Pane**: Contains all PDF functions and commands.

5. **Document Pane**: Displays PDF.

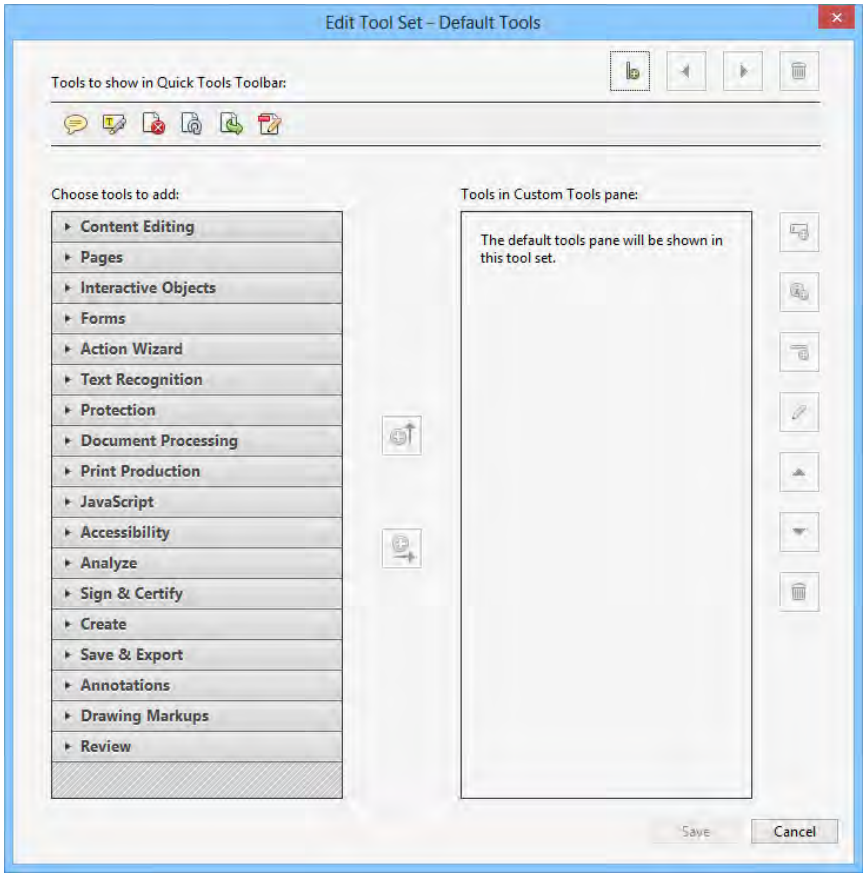
C. Customizing the Interface:

1. Quick Tools Toolbar:



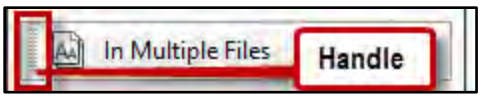
Icons can be added to the Quick Tools Toolbar by either:

a. Clicking the configure button and adding commands via the dialog box



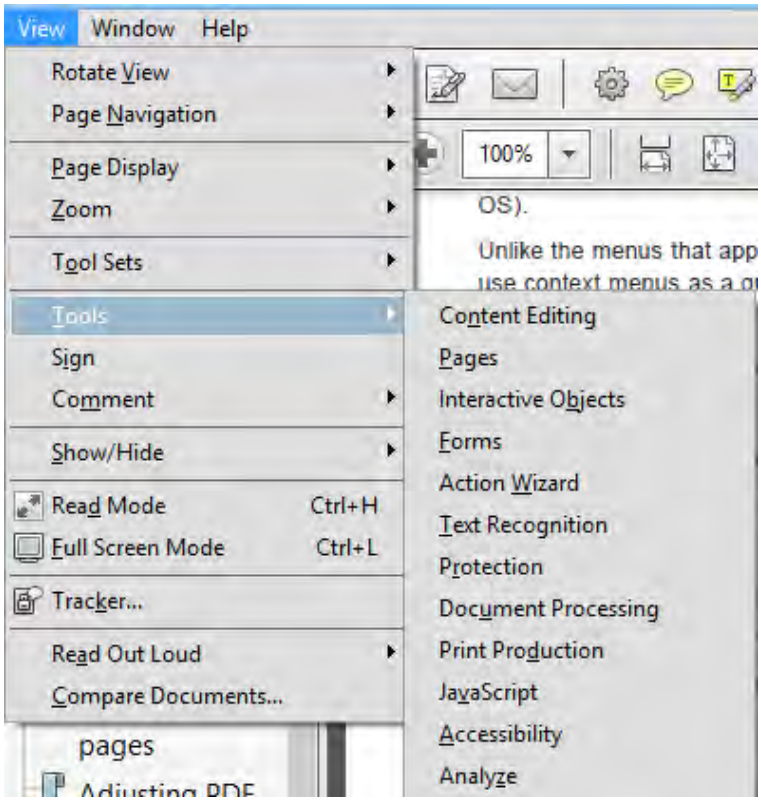
or

b. Dragging and dropping icon from the Task Pane to the Quick Tools Toolbar. To drag an icon, you must use the handle on the icon:



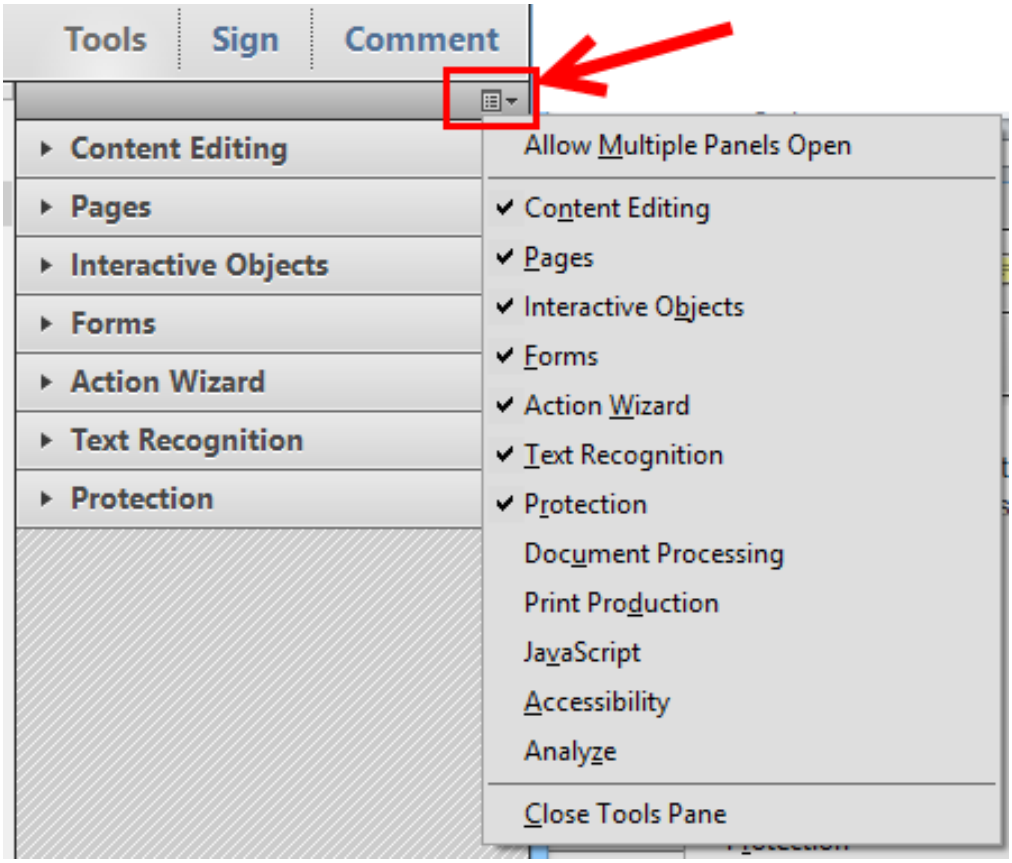
2. **Customizing the Task Pane**: To show the different groups of PDF functions and commands in the Task Pane either:

   a. On the menu, click View ➔ Tools

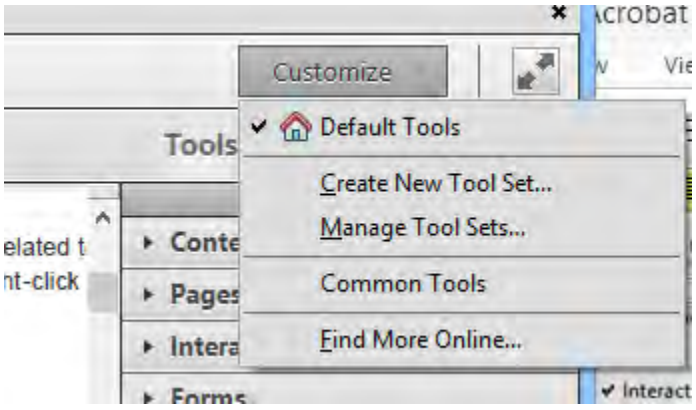


   or

b. Click on the options at the top of the Task Pane:



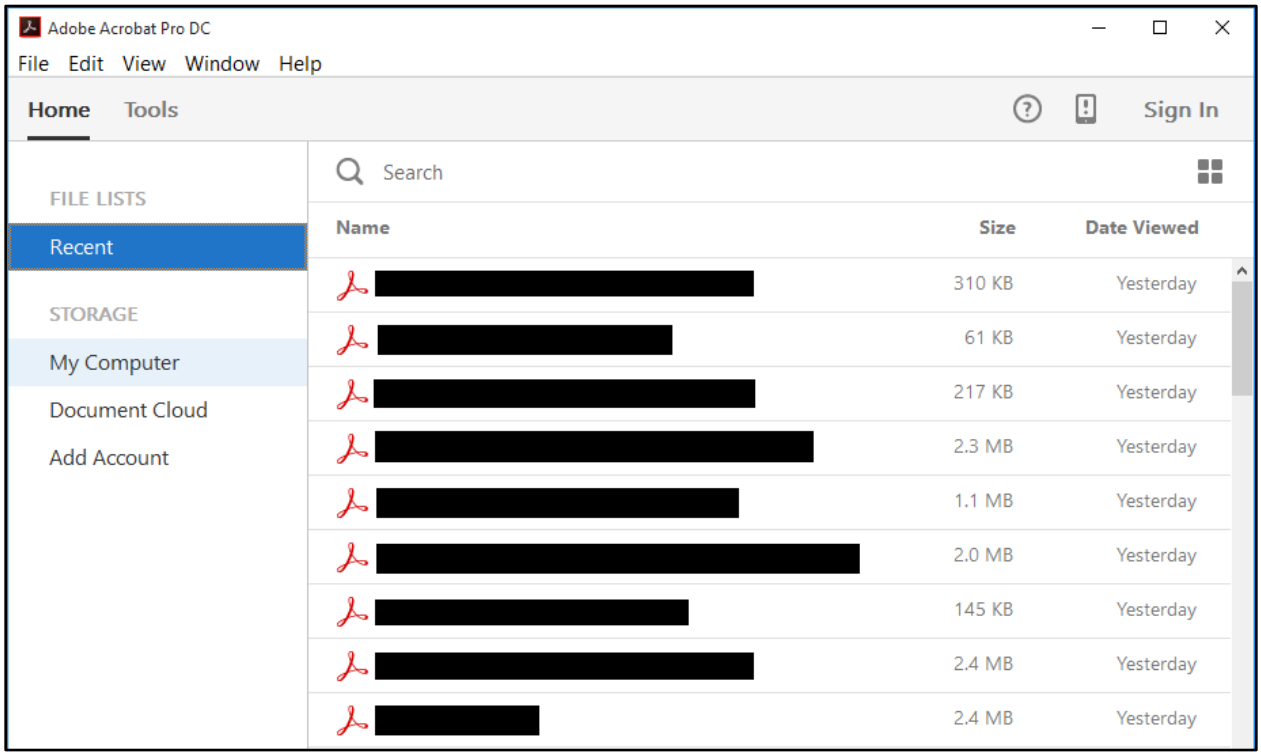
3. **Tool Sets**: At the upper right hand corner of the screen is the Customize button. Click this button and select "Create New Tool Set" to save a configuration of Task Pane Controls and Quick Tools Toolbar. You can save multiple sets and switch between them.



Choose "Manage Tool Sets" to rename, delete, import or export tool sets.

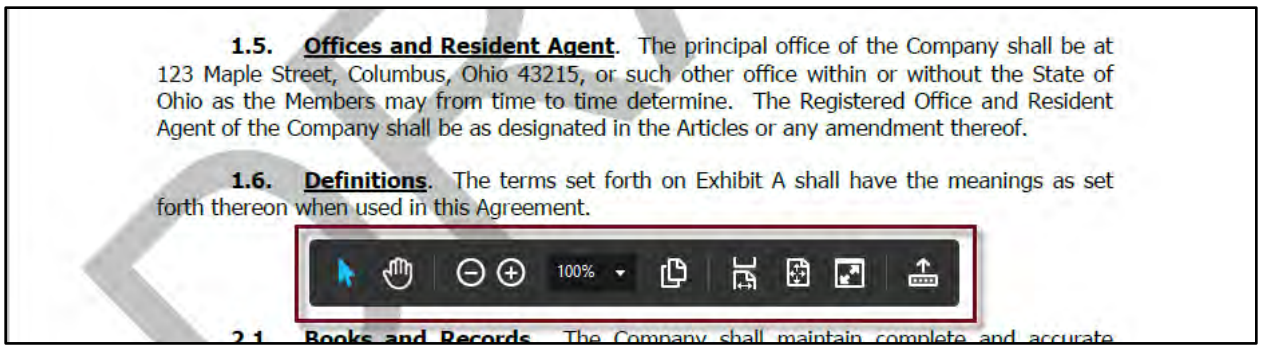
IV. **<u>THE ACROBAT DC INTERFACE</u>**: Unfortunately, Adobe completely redesigned the Acrobat interface with version DC. Here's what you need to know in order to follow the steps and instructions outline in the balance of this manual.

A. **Home Screen**: When you first launch Acrobat, this is what you'll see. It will show you recently used files and you can click on My Computer to browse to other folders and locate files to open.



B. **Document Screen**: When you open a PDF, you'll be in the document screen. Across the top of the screen, you'll see buttons for common tasks (print, email, etc.). <u>Here's what you need to know about this screen</u>:

1. In prior versions of Acrobat, there were buttons always visible for zooming in or out, selecting text and the like. Now, the toolbar containing these functions (called the Page Controls toolbar) floats at the bottom of the screen and randomly disappears when Acrobat thinks you don't need it.



If you find the floating toolbar to be as annoying as I do, then you'll want to permanently attach it to the toolbar at the top of the screen. You can do this by clicking the button on the Page Controls toolbar when it appears (right side of toolbar).

2. It's not obvious, but if you want to select text in a searchable PDF, then you have to click this button first: (which is on the Page Controls toolbar).

3. There is a Tools Pane on the right side of the screen that can be shown, hidden and very importantly, customized. The Tools Pane presents you with a few tools by default but you can add whatever you would like. First, if you don't see the Tools Pane, you can open it by clicking the right arrow in the middle of the right side of the screen. It looks like this:

You can also open it by hitting Shift+F4 or clicking the View menu ➔ Show/Hide ➔ Tools Pane.

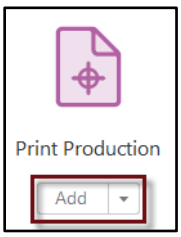
Once the pane is open you can access tools by clicking the appropriate button. Once you activate a tool, most of them will provide you with buttons that appear at the top of the screen. For example, if I click on the Comment button, I see this:

If I want to close the comments environment, I can either click the Comment drop down (left side) and choose Back to Document; or I can click the X on the far, right-side of the screen.

After you've clicked a tool button, it may not show you ALL of the available functions on the buttons that appear at the top of the screen. Watch out for

buttons on the right edge of the toolbars and click them to see what might otherwise be concealed.

C. **Tools Screen**: If you want to control what tools appear in the Tools Pane, you need to go to the Tools screen. You'll see all of tools available and if you click the add button below a tool, it will be added to your tools pane. For example:



D. **Navigation Pane**: If you want to see the Navigation Pane, just hit F4 or click the View menu → Show/Hide → Navigation Panes → Show Navigation Pane. This will allow you to easily see and browse thumbnails of the pages, bookmarks or attachments.

V. **<u>VIEWING PDFS</u>**: In addition to the main screen, Acrobat offers several other modes to view a PDF:

A. **Read Mode** (CTRL + H): Read Mode hides all the controls, except for the menu, on the screen and fills the ***window*** with the PDF. Press the Escape Key to return to the main screen or toggle back and forth with CTRL+H.

B. **Full Screen Mode** (CTRL + L): Full Screen mode fills the entire computer ***screen*** with the PDF. Press the Escape Key to return to the main screen, or toggle back and forth with CTRL+ L. This is important to remember with Acrobat DC because

if you put it in full screen mode, the ONLY way to get it out of that mode is Ctrl + L.

C. **Read Out Loud**: If the PDF is text based or the text has been recognized, Acrobat can read the PDF using a built in speech synthesizer. To have Acrobat read a PDF:

1. Click View ➔ Read Out Loud ➔ Activate Read Out Loud

2. Click View ➔ Read Out Loud ➔ Read Page or Read To End of Document

VI. ACROBAT PDF CREATION METHODS:

A. **Create PDFs from a Word Processor Using the PDF Printer Driver**: While this method certainly works and is easy, there are better alternatives below which create PDFs with bookmarks already in them.

1. Open the word processing file that you want to convert to a PDF. Note that nothing that you are doing will affect the underlying document.

2. Click **File** from the menu bar, and then **Print**. In the Print dialog box, you will have an option at the top to change the printer to which this print/save job will go.

3. Change the printer to **Adobe PDF** and click the **OK** button.

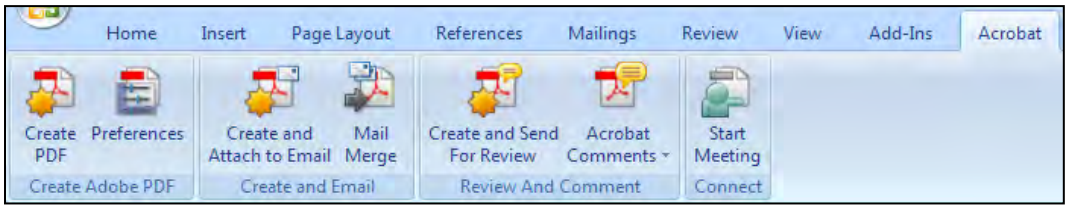
4. You will now be presented with a **Save PDF File As** dialog box. Here, you must designate the folder into which you'll deposit your PDF file and give it a name.

5. You will shortly see a dialog entitled **Creating Adobe PDF** and a few seconds later, you will see the PDF you created which is viewed in Adobe Acrobat.

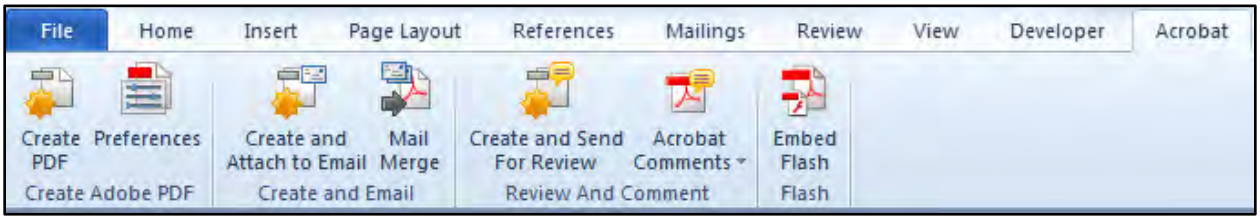
B. **Create PDFs Using PDFMaker Buttons in Word**: As described in paragraph I.F. above, some version of Acrobat provide integrate with Microsoft Office. In Word versions 2003 and prior, the integration creates new buttons in Word which look like this:

The button on the left creates a PDF from the document you've opened in Word. The button on the right creates a PDF from the document on your screen and sends it for review (via email) to another party (via email). The "send for review" button even adds instructions to the recipient on how to annotate the PDF and insert comments.

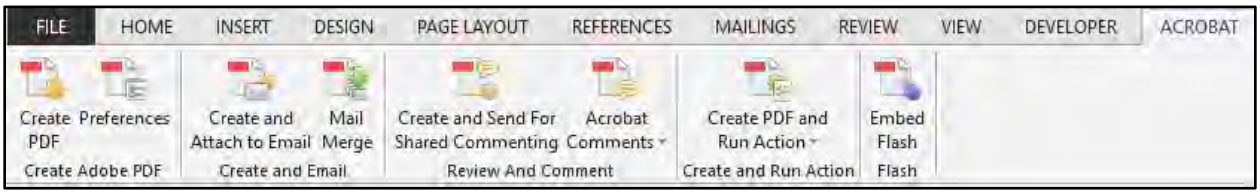
If you're using Word 2007, you'll see an extra tab on your ribbon and labeled buttons will appear if you click on the tab:



If you're using Word 2010, you'll see this extra tab:



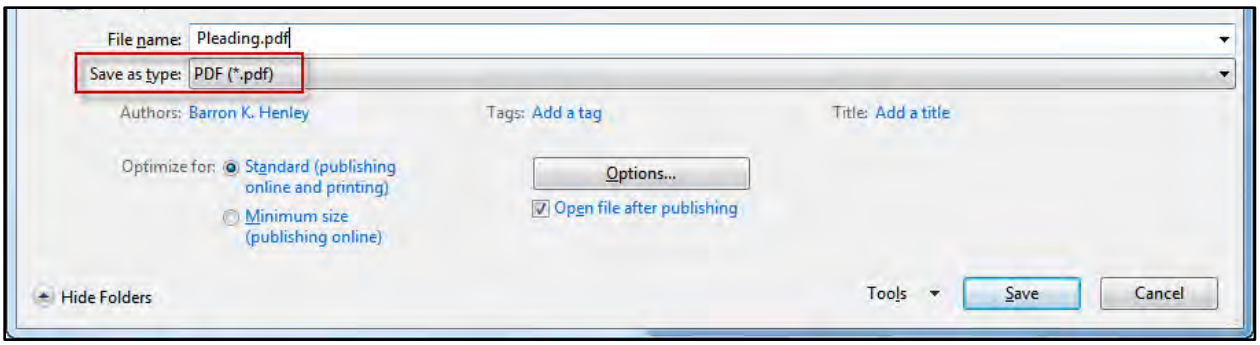
In you're using Word 2013, you'll see this tab:



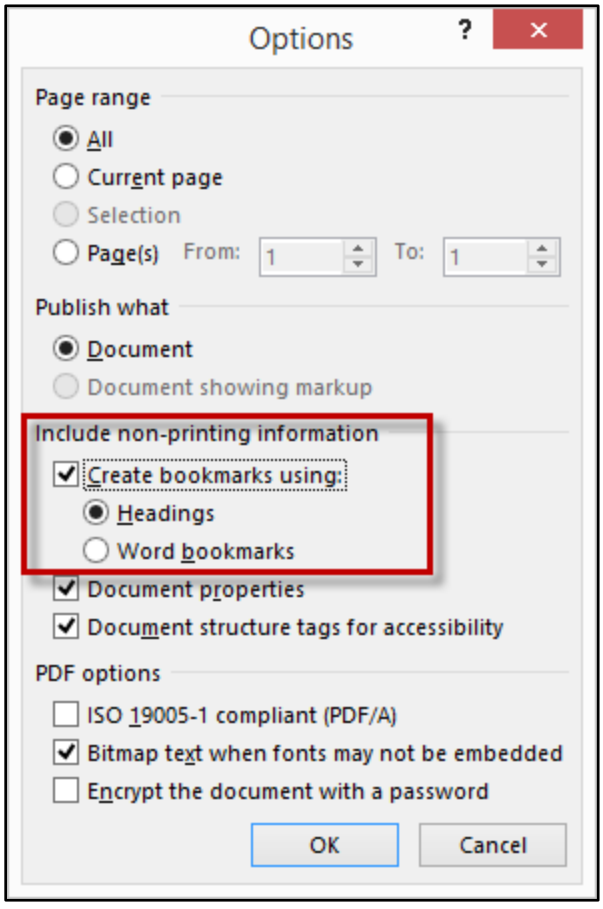
The ***big benefit*** of using these buttons rather than the method outlined in paragraph VI.A. above is that if you have used Styles in your source Word document, automatic paragraph cross references, auto-generating tables of contents and the like[3], Acrobat automatically sets up hyperlinks so your resulting PDF is interactive (and searchable) and PDF Bookmarks are created for all Heading styles in the source Word document (see paragraph XVIII.A. on page 55).

C. **Create PDFs Using Word's Native PDF Maker**: If you have Word 2007 (Service Pack 2), Word 2010, 2013 or 2016, then you can create PDFs without buying Acrobat or installing anything else. Simply open the document for which you want to create a PDF, then click the Office Button (2007)/File menu (2010/13/16) ➔ Save As ➔ click the drop down menu adjacent to "Save as type" and choose PDF (*.pdf). Note that this has no impact on the original document and does not save it so you need to do that separately.

[3] If you don't know how to use any of those features in Word, we can provide training for you. Just contact Barron Henley at bhenley@affinityconsulting.com.

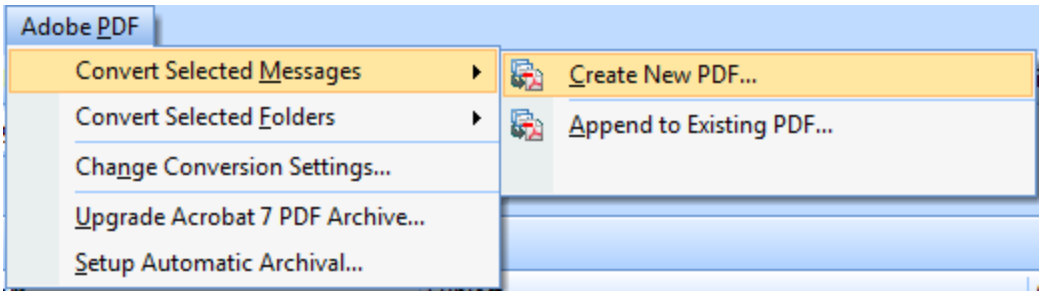


Also note that if you click the OPTIONS button in the dialog above, you can create bookmarks using Word's heading styles or plain Word bookmarks.

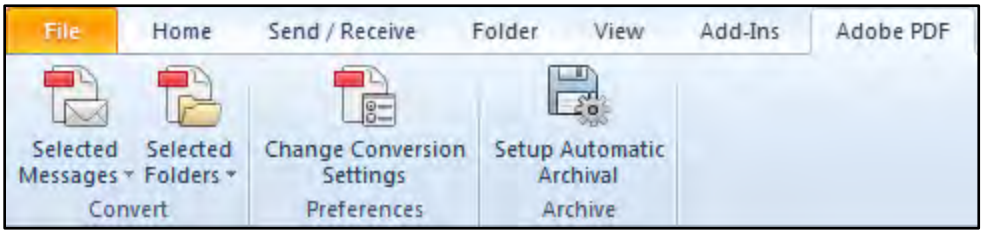


D. **Create PDFs Using WordPerfect's Native PDF Maker**: Open the documents for which you want to create a PDF ➔ click the File menu ➔ Publish to PDF.

E. **Create PDFs from Outlook With Acrobat Integration**: Acrobat also installs a few buttons and one additional menu in Microsoft Outlook. For those that wish they had a good way to archive and store emails and attachments, this integration can be a life-saver. The Outlook 2003 & 2007 integrations create new menus in Outlook:



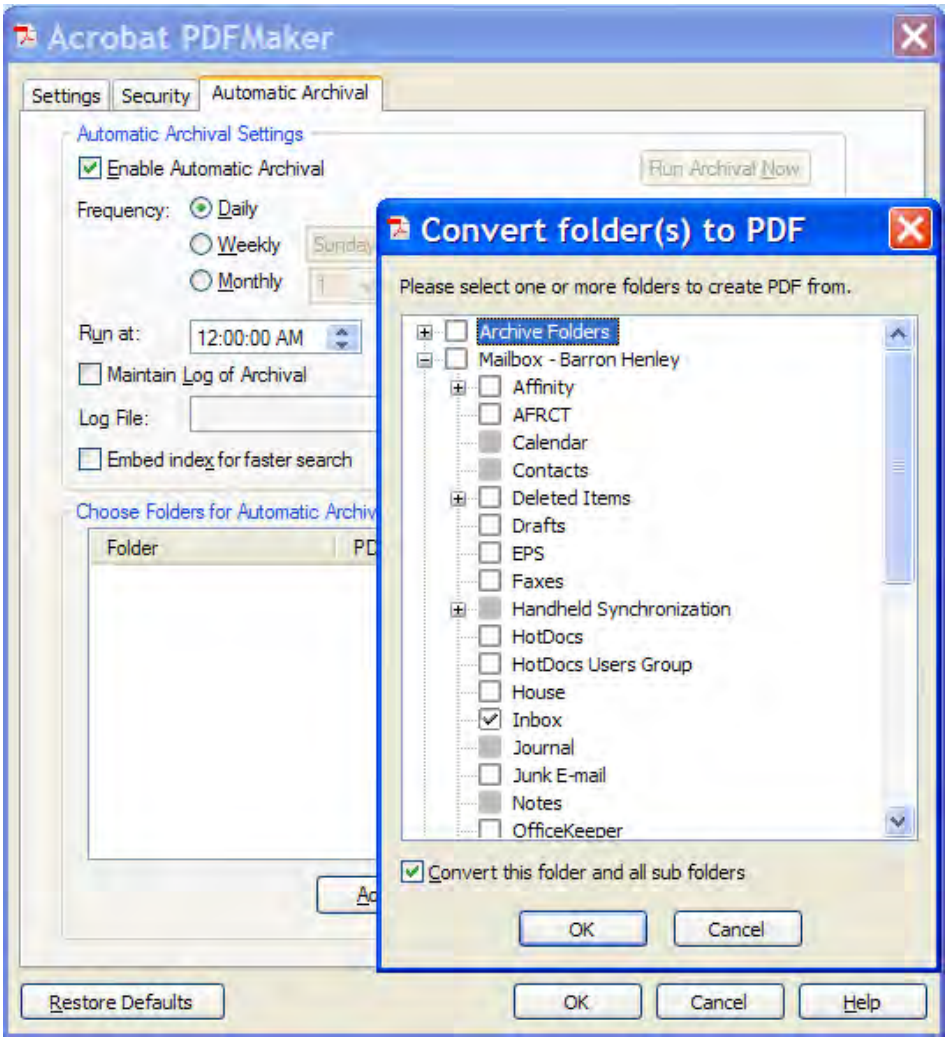
In Outlook 2010/13/16, the integration creates a new tab that looks like this:



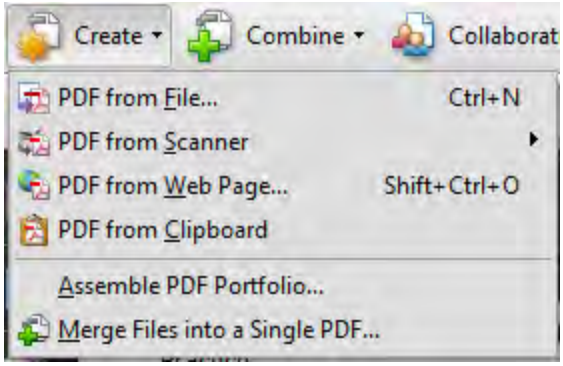
1. **Creating PDFs from Individual Emails or Entire Folders**: With Acrobat 9, simply select individual emails (Ctrl+left click) or select entire folders; then click the Adobe PDF menu ➔ Convert to Adobe PDF and then the appropriate sub item. With the combination of Acrobat X/XI and Outlook, select the appropriate emails or entire folders, then click the Selected Messages or Selected Folders button from the Adobe ribbon in Outlook. This will create a single PDF which contains all of the emails you've selected and all of the attachments thereto.

2. **Adding Subsequent Emails to Existing PDFs**: If you receive additional emails which need to be added to an existing PDF archive, simply choose Convert and Append to Existing Adobe PDF.

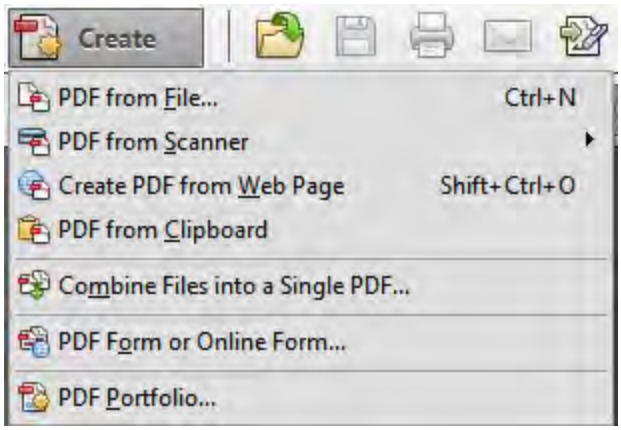
3. **Automatic Archival**: As you can see from the screen shot above, you can also setup folders to automatically archive themselves. This would be particularly useful if you have setup Outlook rules to automatically sort your email into specific folders and then use Acrobat to automatically archive it.



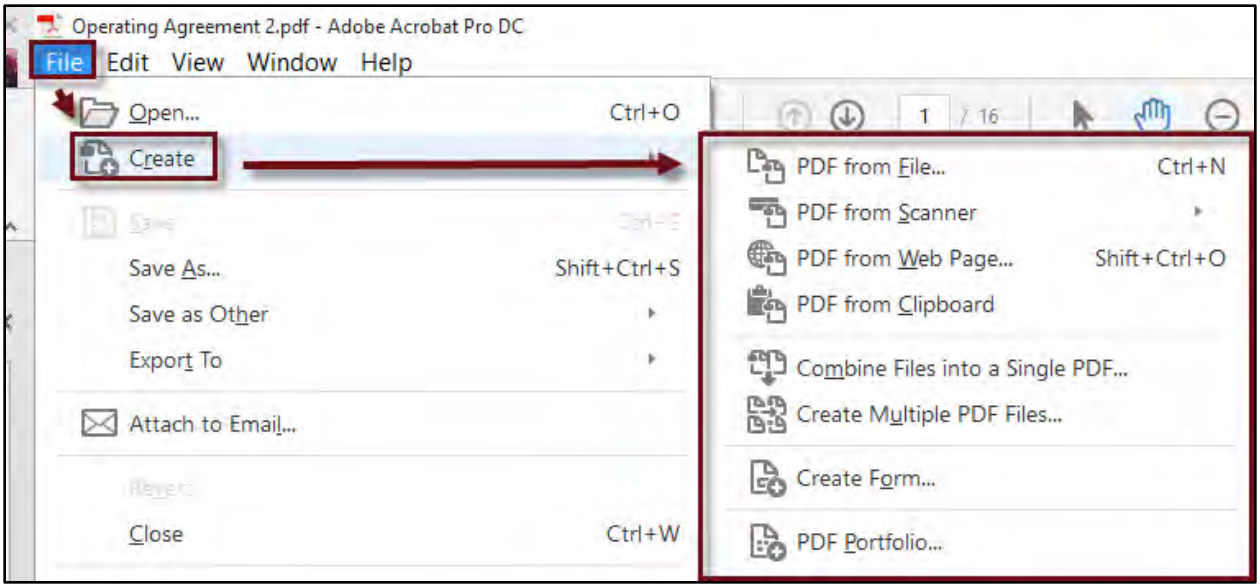
F. **Create PDFs from Within Acrobat**: With Acrobat 9, this is as easy as clicking a button (Create). Once you click the button, you'll be presented with options:



In Acrobat X/XI, the menu is slightly different:



In Acrobat DC, the menu is also slightly different:



Choose the appropriate option and Acrobat walks you through the rest of the steps.

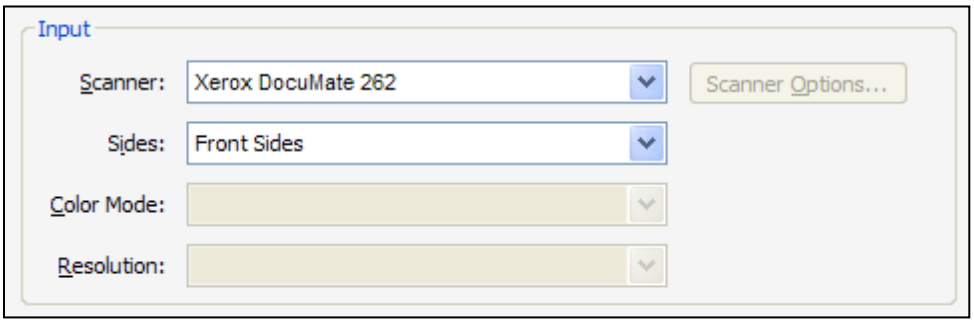
G. **Create PDF from Web Page**: According to Acrobat's help, a PDF that you create from a web page is only as accessible as the HTML source that it is based on. For that reason, you may not want to create a PDF using Create PDF → From Web Page. Some images may not print and some hyperlinks may not be active. Therefore, if you want to make a PDF out of a web page, try this method and the method described in paragraph VI.A above to see what yields a better result. Before you make a PDF from a web page using the PDF printer driver, make sure you look for a PRINT button somewhere on the web page itself (rather than in your browser). This will normally clean up what you're trying to create a PDF from

and take out much of the advertising and other non-story related items on either side of what you want.

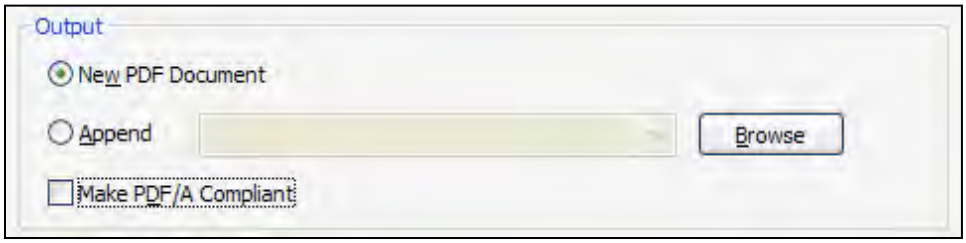
H. **Create PDF from Scanner**: If you have a TWAIN or WIA compliant scanner connected to your computer, then you can create PDFs from paper documents. Just follow these steps:

1. In Acrobat X or XI, click the Create PDF button or in DC, click the File menu ➔ Create, then choose "From Scanner..."

2. In the Input section, choose your scanner.

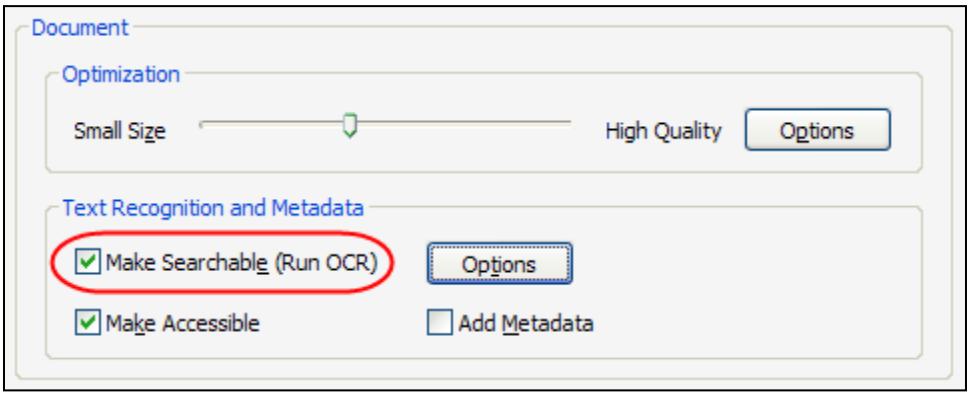


3. In the Output section, choose "new" or you "append" if you want to add this PDF to an existing one.

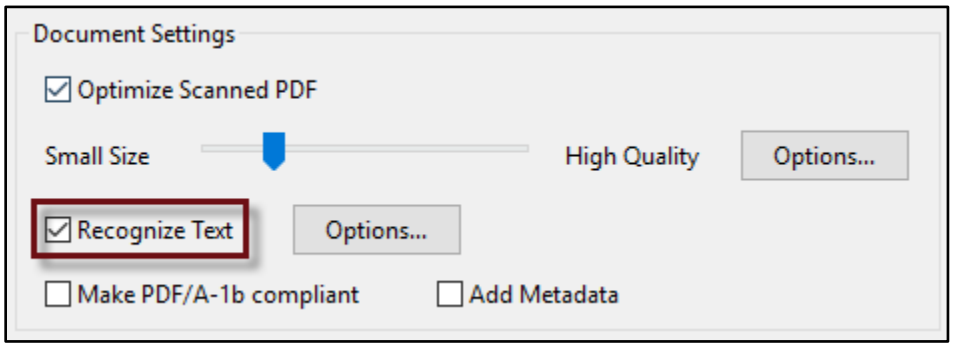


4. The PDF/A reference in the above screen-shot refers to a standard defined by the International Organization for Standardization (ISO). PDF/A refers to long-term archiving of electronic documents. During PDF conversion, the file that is being processed is checked against the PDF/A standard. If the PDF will not meet the selected ISO standard, a message appears, asking you to choose between canceling the conversion or going ahead with the creation of a non-compliant file.

5. In the Document section of versions X or XI, make sure you check "Make Searchable..." so that the text inside the PDF can be searched.



In DC, the Document Settings are a bit different and you want to check "Recognize Text."



6. Click the Scan button, save the PDF and you're done.

I. **Converting to PDF/A**: If you need to convert an existing PDF to PDF/A for electronic case filing, open the PDF you want to convert in Acrobat and follow these steps:

1. **Acrobat X**: Click File menu ➔ Save As ➔ More Options ➔ PDF/A.

2. **Acrobat XI & DC**: Click the File menu ➔ Save As Other ➔ Archivable PDF (PDF/A)

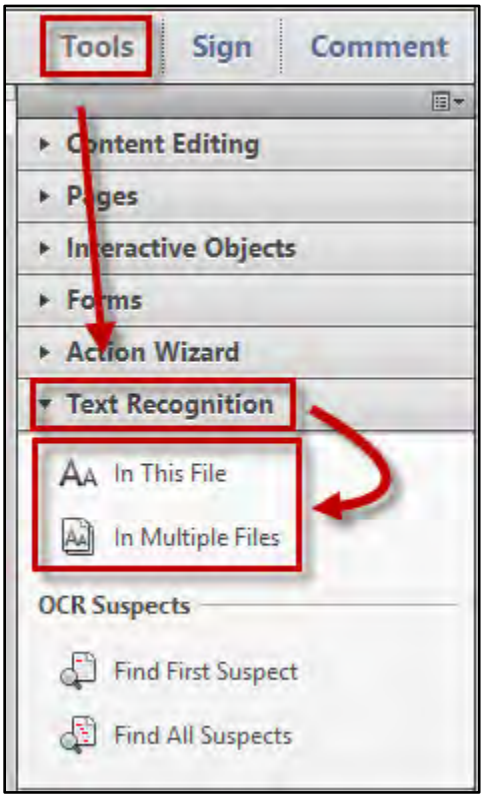
VII. **<u>CONVERTING IMAGE ONLY PDFS INTO SEARCHABLE PDFS</u>**: When you scan documents into PDFs, they are image-only PDFs (see paragraph II.A.1. above). If you want to be able to find them in the future by the text they contain, then they'll have to be converted to searchable PDFs.

A. **One PDF At A Time**: You can make this conversion one PDF at a time by opening the PDFs in Acrobat Standard or Professional. Just follow these steps:

1. Open the PDF you want to make searchable.

2. In Acrobat 8 or 9, click the Document menu ➔ OCR Text Recognition ➔ Recognize Text Using OCR.

   In Acrobat X/XI, click the Tools button ➔ Recognize Text ➔ In This Document.



   In Acrobat DC, open the Enhance Scans tool (from the Tools menu or the Tools pane) ➔ Recognize Text ➔ In This File. You can also accomplish this by using the Enhance button in the same toolbar.

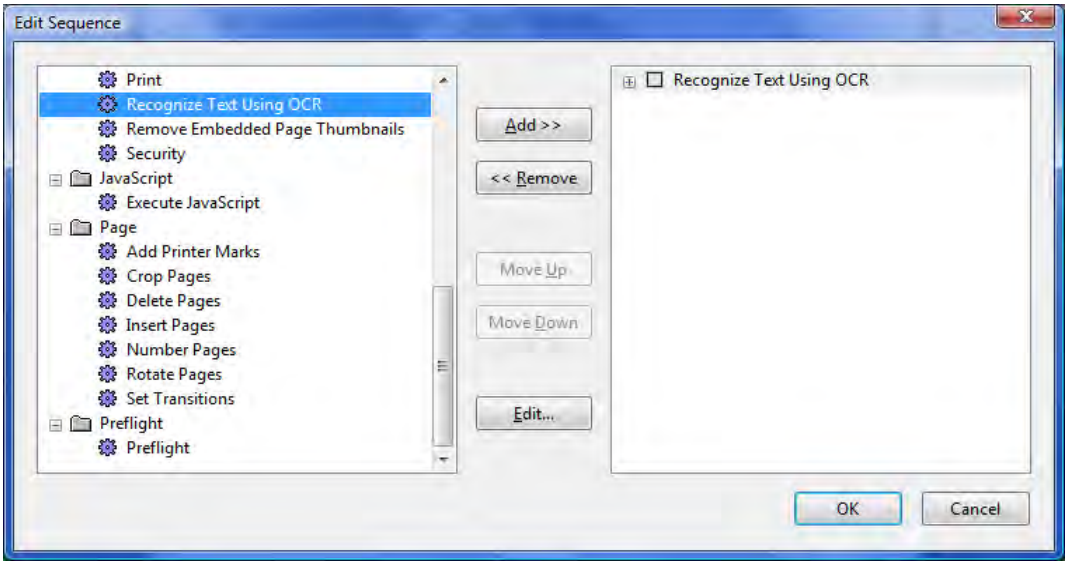
3. In Acrobat X & XI, just click OK in the next dialog. In DC, click the Recognize Text button.

B. **Batch Processing to Searchable PDF in Acrobat 9**: If you have a folder of image-only PDFs and you need to convert them to searchable PDF, you can do this in bulk using Acrobat's **Batch Processing** feature. Just follow these steps:

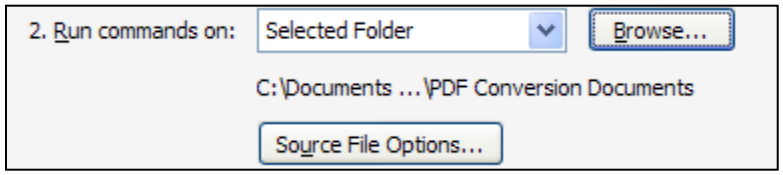
1. Select Advanced from the menu bar, Document Processing and then Batch Processing.

2. Select New to create a new Batch Sequence. Call it something like "Convert to Searchable " and click OK.

3. Click on Select Commands, then choose Recognize Text Using OCR and click the Add button, then click OK.

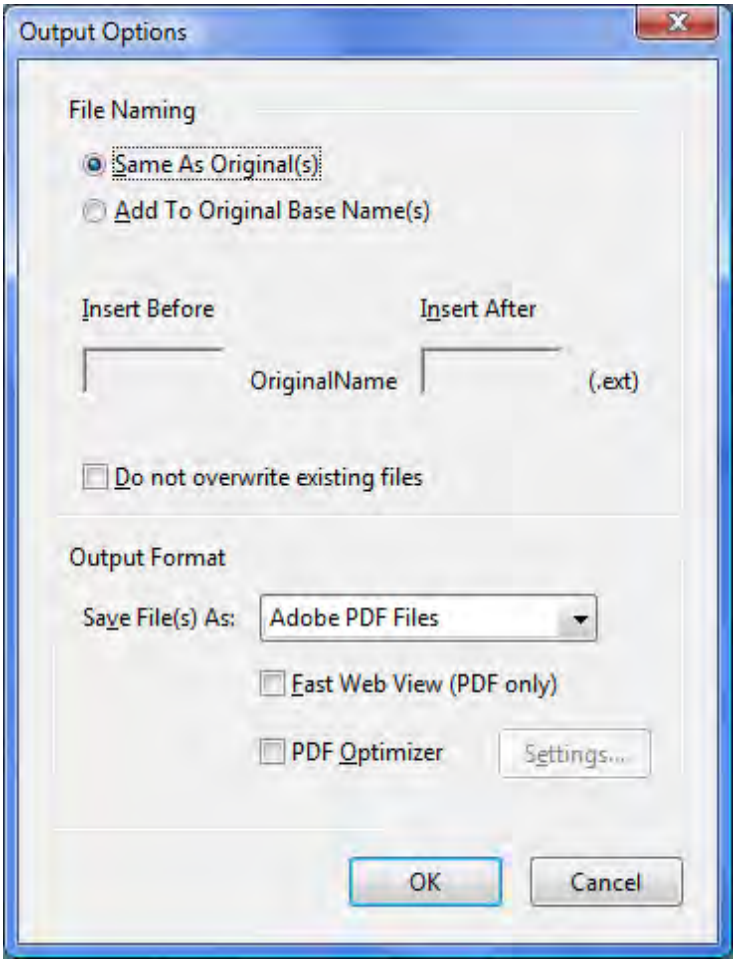


4. Under **Run commands on**, choose **Selected Folder** and then click Browse to select the desired folder containing the PDFs to convert.



5. Under Select output location, choose Same Folder as Original(s).

6. Now click the Output Options button. If you want to over-write the existing PDFs with new searchable PDFs, choose Same As Original(s) under File Naming. If you want to create new names, choose Add to Original Base Name(s), add a prefix or suffix and check Do not overwrite existing files. In any event, uncheck Fast Web View (PDF Only) and make sure the Save File(s) As selection is set to Adobe PDF Files.



7. Click OK, OK and Close.

8. If you want to run the batch sequence, simply the **Advanced** menu, then **Document Processing**, then **Batch Processing**. Choose your batch sequence, then click **Run Sequence**, then click **OK**.

   NOTE: This process can take a while so don't be alarmed.

C. **Batch Processing to Searchable PDF in Acrobat X/XI**: Just click the Tools button ➔ Recognize Text ➔ In Multiple Files. Browse to the documents you want to OCR and click OK.

D. **Batch Processing to Searchable PDF in Acrobat DC**: Click the Enhance Scans tool. If you have a PDF already open, you can choose the Recognize Text button ➔ In Multiple Files. Identify the files and click OK. If there are no PDFs open, then in the next screen, choose "Or recognize text in multiple files" to initiate the process.

VIII. COPYING TEXT OUT OF A PDF:

A. **PDF Must Be Searchable In Order to Copy Text**: In order to copy text from a PDF, the PDF must not be secured or locked down and it must be a searchable PDF.

B. **Copy Text From a PDF and Insert into Word Processor**:

1. If your PDF is searchable and not otherwise secured, then you can use the or button to select text (hold down on your left mouse button and drag). Once the text is selected, you can click **Edit** and then **Copy**, then you can go into a Word or Word Perfect document and click **Edit** and then **Paste**.

2. If you don't have any text in your PDF, you can use OmniPage Pro to pull out the text or Adobe's Convert to Text/OCR feature.

C. **Convert PDF to Word Processor Document**: If you're using Acrobat X or XI, open the PDF you want to convert in Acrobat. Click the File menu → Save As Other → Microsoft Word → Word Document. If you're using Acrobat DC, then click the File Menu → Export To → Microsoft Word → Word Document.

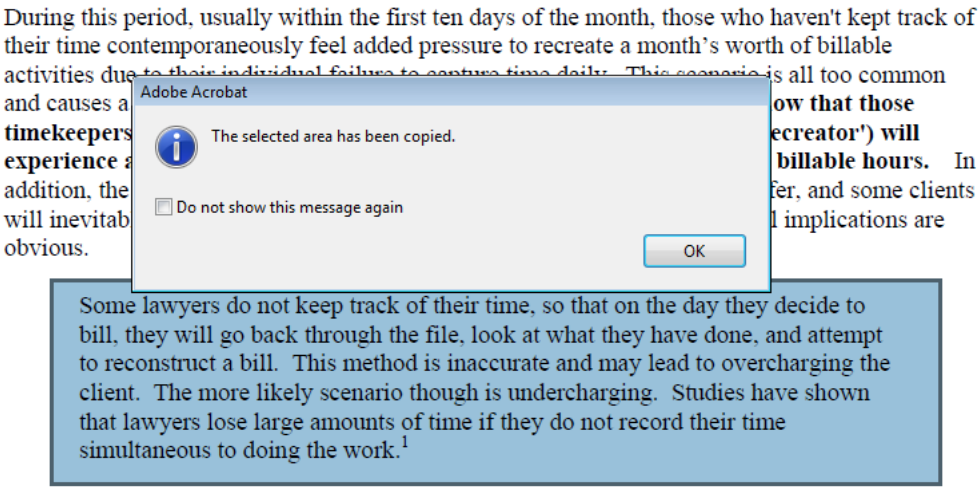
IX. SNAPSHOT TOOL:

A. **Acrobat Versions**: The snapshot tool is available in Adobe Reader and Adobe Acrobat (Standard and Professional) versions 9, X, XI and DC.

B. **Taking a Snapshot of a PDF**: If you want to capture part of a PDF as an image/picture so you can insert it into a Word document or PowerPoint presentation, for example, this is easily accomplished using the Snapshot tool in Adobe Acrobat. This is useful for including a paragraph of another document in a letter you're drafting. For example, if I were discussing a certain paragraph (not as text, but instead as an image) of a lease my client signed, I could literally insert a snapshot of the paragraph into the letter I am drafting rather than re-typing it. To take a snapshot, just follow these steps:

1. In Acrobat 9, click the Tools menu → Select and Zoom → Snapshot Tool. In Acrobat X, XI and DC, simply click the Edit menu → Take a Snapshot.

2. Hold down on your left mouse button and draw a box around the text in the PDF you'd like to take a snapshot of. Once you release the mouse button, the section of the PDF you drew the box around is now on your clipboard.



3. Go into Word, WordPerfect or PowerPoint and simply paste (Ctrl + V) the snapshot into your document or presentation.

C. Great Uses For This Feature:

1. Inserting image clips of text into letters and pleadings.

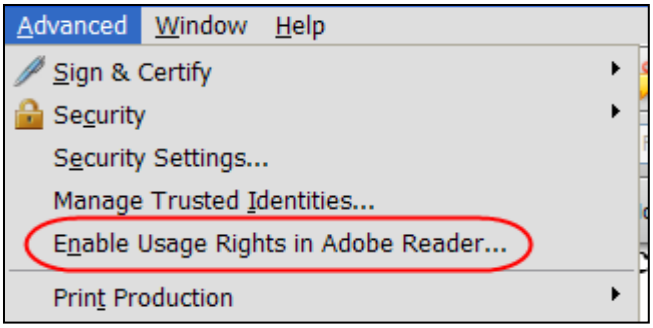
2. Inserting image clips of text (statutes, contract provisions, deposition answers, etc.) into PowerPoint presentations.

3. Inserting deposition answers into a witness exam outline for trial

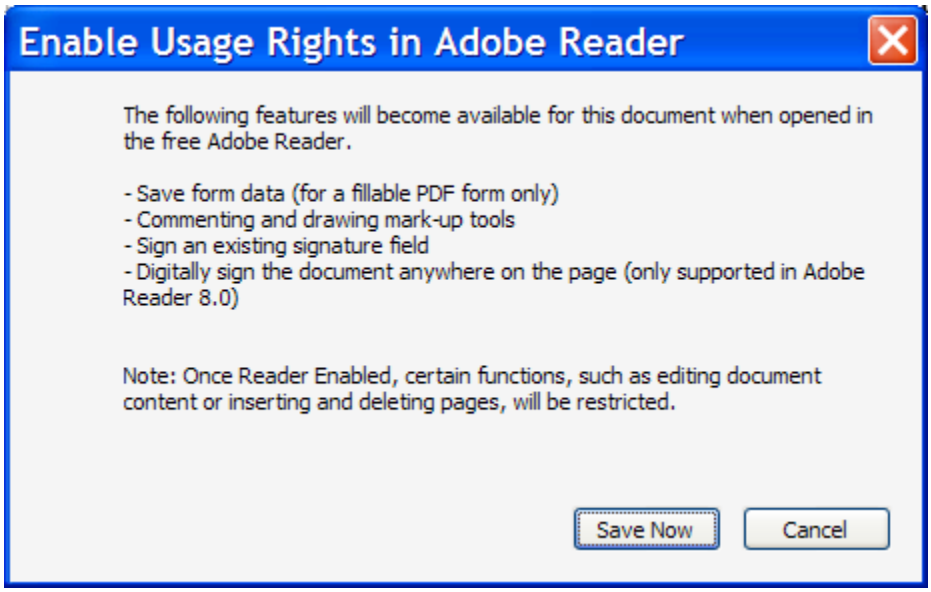
X. ADDING COMMENTS AND MARKUP TO PDFS:

A. Requirements: In order to comment on PDFs and annotate them, you must have Adobe Acrobat Standard or Professional. However, if you have Acrobat Professional, you can create PDFs that will allow recipients with nothing more than the free Adobe Reader to comment on and annotate your PDFs.

B. Enable Usage Rights in Adobe Reader: If you have Acrobat Professional version 8 or 9, then once you've created a PDF and it is open in Acrobat, you can give Adobe Reader users full annotation rights by clicking the Advanced menu ➔ Enable Usage Rights in Adobe Reader.



You're next presented with this dialog:



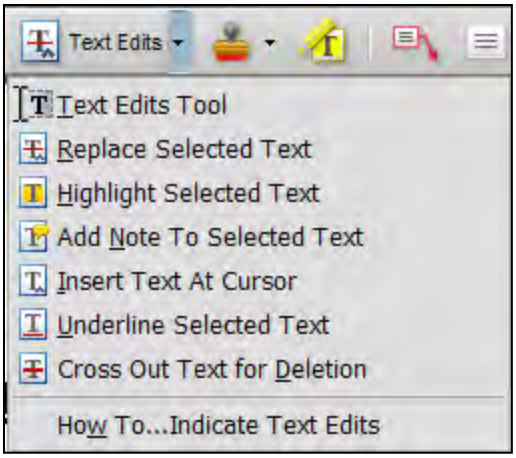
Simply click Save Now and you are ready to send it to someone else.

If you have Acrobat Professional X or XI, then click the File menu ➔ Save As ➔ Reader Extended PDF ➔ Enable Additional Features ➔ Save Now. In DC, click the File menu ➔ Save As Other ➔ Reader Extended PDF ➔ Enable More Tools.

C. Add Suggested Text Edits to a PDF:

1. First, open the PDF you want to annotate, click the or button (depending upon your version) and then select the text in the PDF you want to annotate.

2. In Acrobat 9, click the Text Edits button and choose an option. As you can see, there are plenty of choices!



3. In Acrobat X and XI, click the Comment button on the far right side of the screen. In Acrobat DC, click the Comment tool which will reveal the following toolbar.

D. Other Annotations:

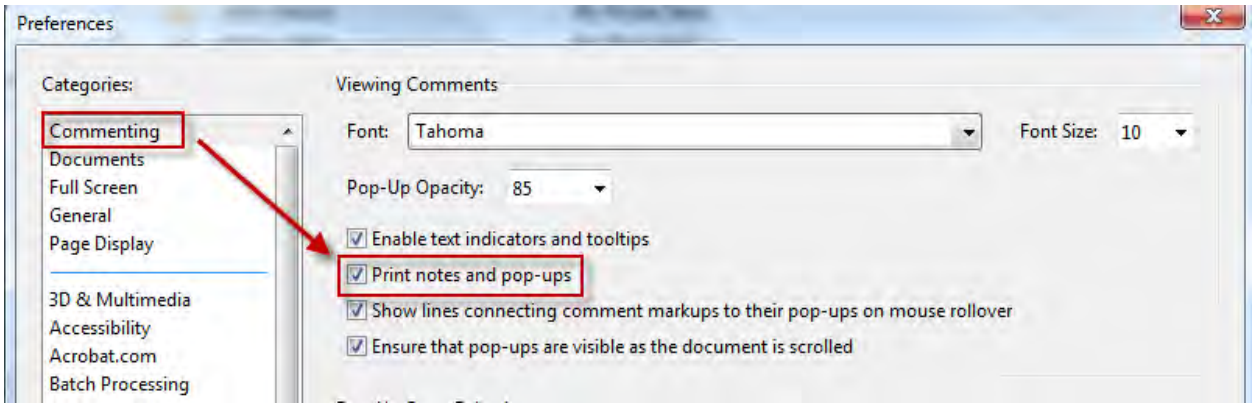
On the same toolbars in all versions of Acrobat (see the previous paragraph regarding how to access the toolbar), there are buttons for the following things:

1. Sticky notes
2. Stamps (for example, DRAFT, SIGN HERE, etc.)
3. Highlighting text
4. Creating Callouts
5. Text boxes
6. Clouds (squiggly boxes)
7. Arrows
8. Lines
9. Boxes
10. Circles
11. Pencil (draw free-hand)

12. Attach files - you can insert other files (such as a Word file) into a PDF. It appears as an icon and if you double click it, the original file will open in its original format (it is not converted to PDF). An attached file icon looks like this:

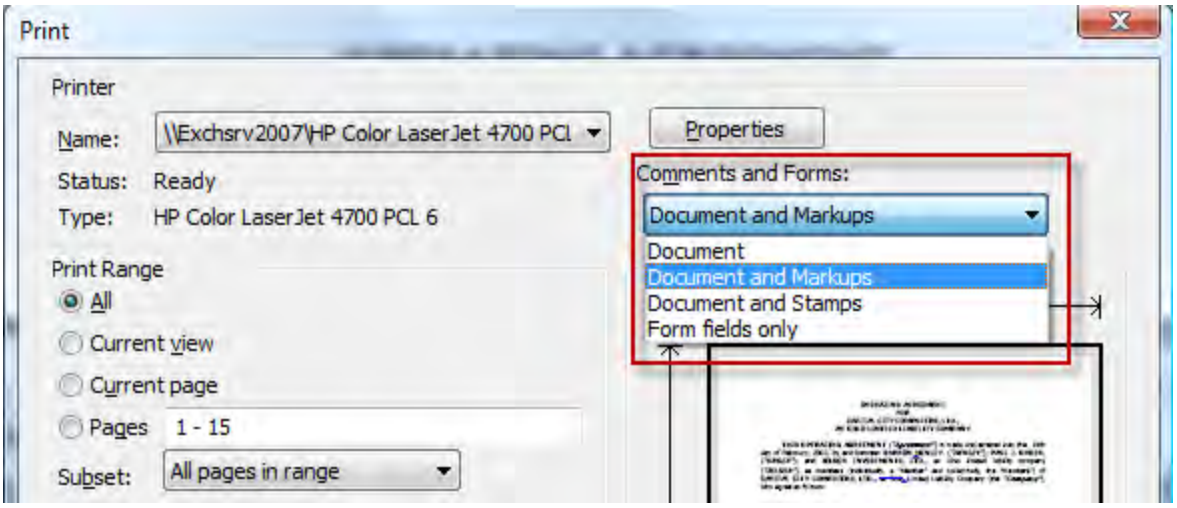
13. Record audio - you can record voice messages and attach them to the document. An attached audio file icon looks like this:

E. **Getting Annotations to Print**: When you print a PDF with annotations, you need to do two things to make sure they all appear on the printed version. First, you need to go into Acrobat's Preferences (Edit menu → Preferences), then click on Commenting → check "Print notes and pop-ups." Why this isn't checked by default, I cannot imagine, but it isn't.

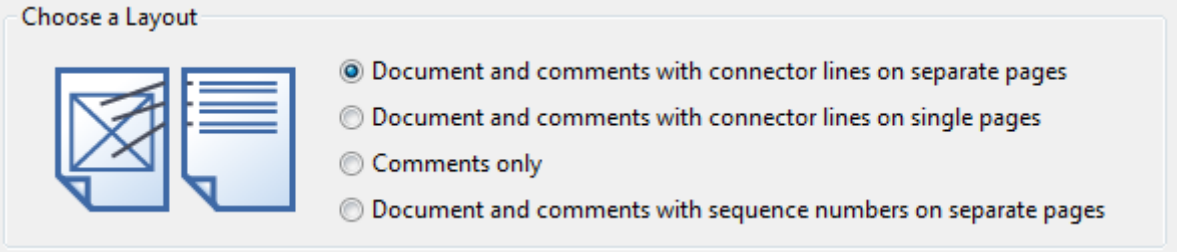


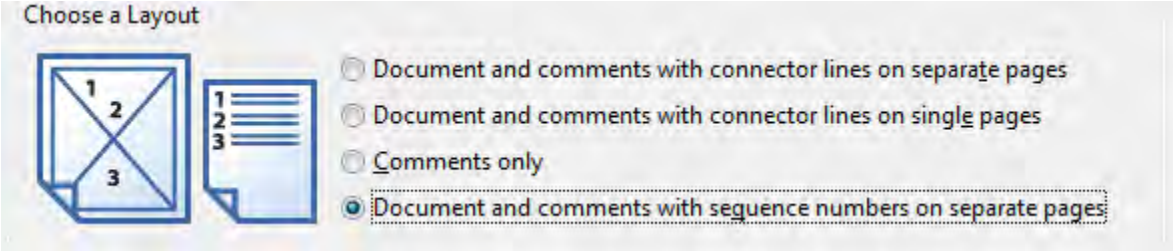
F. **Printing Annotations**: One would logically assume that if you print a PDF with comments and/or annotations, those annotations would show up on the printed copy. Well, one should never assume! However, Acrobat has excellent options for printing annotations and comments.

1. **Printing Document Options**: When you click the Print button in Acrobat, you'll get the standard print dialog. At the top of that dialog, you'll see a "Comments and Forms" setting. Click the down-arrow below it and you'll see your options. However, this will NOT provide you with a print out of inserted text, substitute text or the contents of comment or sticky notes. In order to get those things, see the next paragraph.



2. **Printing Comment Summaries**: If you want to print all of the annotations, you have several options. First, click the Print button (or Ctrl+P). At the bottom of that dialog, you'll see a **Summarize Comments** button. In Acrobat 8, 9 & XI, when you click Summarize Comments, you'll see all of your options for printing the comments. They include:

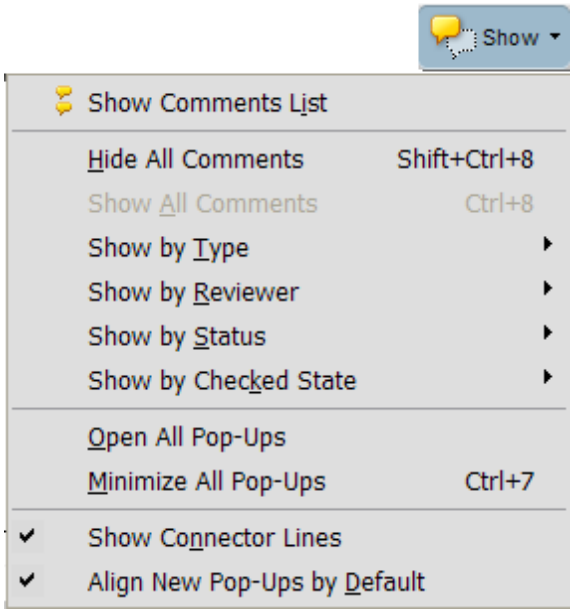




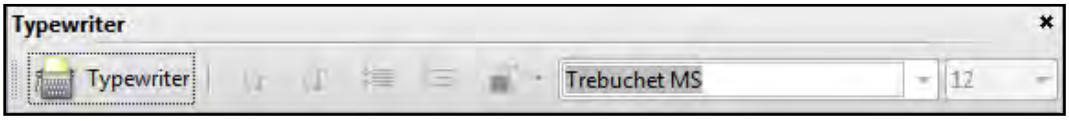
Once you've chosen the option you want, click the **Print Comment Summary Button**, then OK in the subsequent dialog.

In Acrobat XI and DC, you don't get the foregoing options. Instead, it will only produce the annotations in the last format shown above: "Documents and comments with sequence numbers on separate pages."

G. **Show or Hide Annotations**: By clicking the Show button on the Comment and Markup toolbar, you can filter or display the annotations by almost any criteria you'd like:



H. **Adding Text to a PDF**: The Adobe typewriter is an excellent tool to replace the old giant typewriters sitting around taking up space around your office. This feature allows you to type anywhere you want on a PDF (it doesn't matter whether it is fillable). In Version 8 and 9, select **View → Toolbars → Typewriter Tool**. In Version X/XI, to access this tool, select **Tools → Content → Add or Edit Text Box**. The Typewriter toolbar will appear:



At this point, you can click and type on the PDF. If you're using Acrobat DC, then click the Edit PDF tool ➔ Add Text button ➔ click in the open PDF document and type.

XI. **<u>ROUTING PDFS FOR REVIEW BY OTHERS</u>**: PDFs are frequently what lawyers send to one another when negotiating a document. They're not editable like a Word or WordPerfect document, they can be locked down and they effectively eliminate any compatibility issues since PDFs are universal. If you've created a PDF that you want to send to someone else for review and comment, you have many options. More importantly, the other parties to the review only need the FREE Adobe Reader version 7 or higher.

A. **Choose a Review Type**: There are three types of reviews:

1. **Email Based Reviews**: Email-based reviews are ideal for soliciting feedback from individuals who either don't have access to your server (such as opposing counsel).

   In an email-based review, the drafter sends a PDF to reviewers as an email attachment. Reviewers can add comments (proposed changes, etc.) to the PDF and return the document to the originator by using the Send Comments button in either the Comment & Markup toolbar or the document message bar. When receiving these comments, the initiator can merge them into their copy of the PDF.

   The primary limitation to email-based reviews is that participants can't view each other's comments during the review. Initiators can view comments only after receiving them.

2. **Shared Reviews**: Shared reviews are best for groups that work behind a firewall and have access to a remote server. Shared reviews are the most collaborative form of review because participants can read and reply to each other's comments whether they review the PDF locally, as an email attachment, or on a remote server. Reviewers outside the firewall can also participate by sending their comments to a reviewer within the firewall, who then publishes them to the shared PDF.

   Of all the managed reviews, shared reviews provide the most detailed information about the active review. A notification feature lets you know when new comments are available, even when Acrobat is closed, and you're informed of all recent review activity each time you open the PDF. Published comments are saved to the server and to the local hard drive, and Acrobat synchronizes comments between these two locations at regular intervals to download all the latest comments and changes.

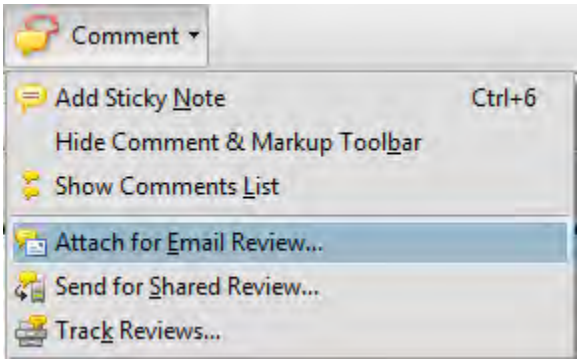
3. **Browser Based Reviews**: Like shared reviews, browser-based reviews are suitable for collaborative groups with access to a shared server. Reviewers can view each other's comments during the review process. In a browser-based review, the initiator uploads a PDF to the server and then sends an email invitation to reviewers. The email includes a setup file that, when clicked, opens the PDF in the default browser. Reviewers click the Send Comments button in the Comment & Markup toolbar to upload their comments, which are stored in a comments repository on the shared server.

   Browser-based reviews lack many of the advantages of shared reviews in terms of setup and tracking tools, and support for network folders. In addition, Acrobat must download all comments in the PDF each time you join the review, often a time-consuming process. For these reasons, Adobe recommends shared reviews as the preferred collaborative method.

B. **Send By Email For Review**: In order to send a PDF for review by email, just follow these steps:

1. **Create PDF**: It doesn't matter what method you use for creating the PDF in the first place. This process is a bit easier if you open the PDF you want to send in Acrobat first, and then initiate. However, you can also choose the PDF you want to work with *after* you initiate the process.

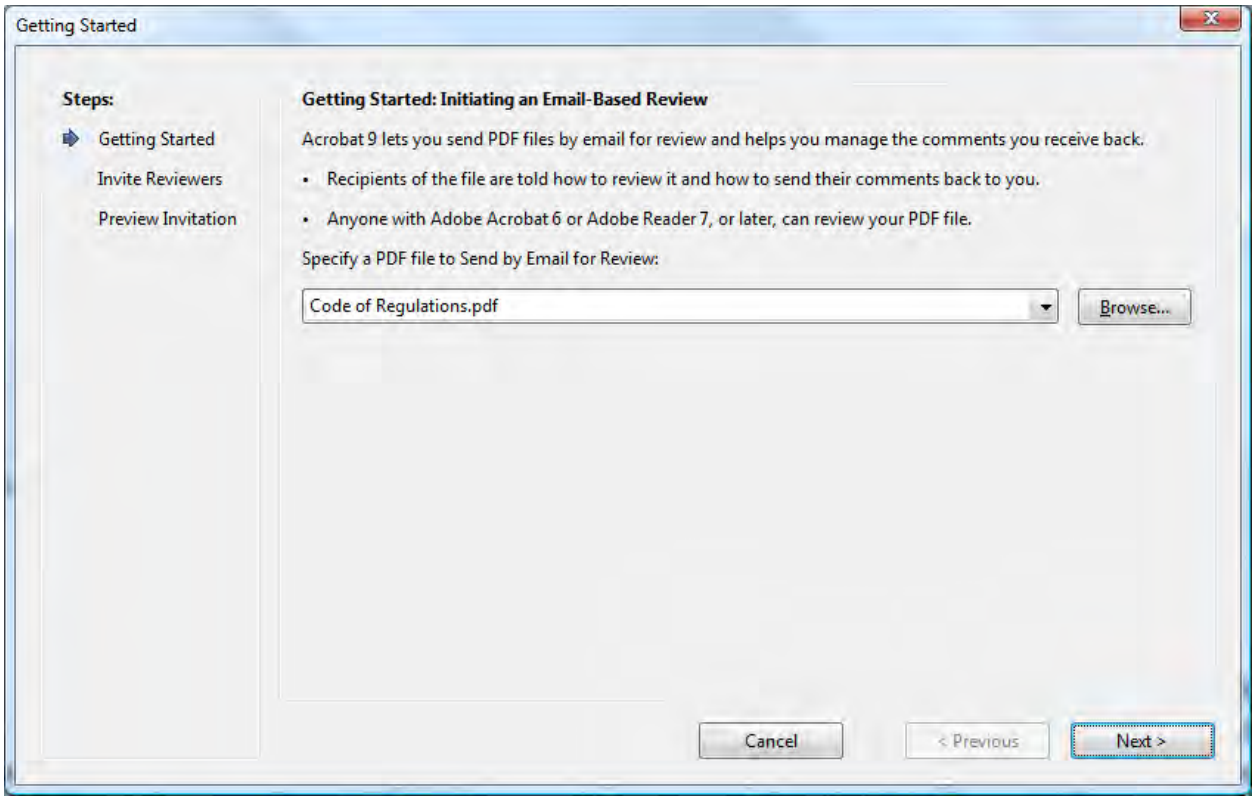
2. **Initiate Email Review Process**: In Acrobat 9, you do this by clicking the **Comment** button, then choosing Attach for Email Review from the menu that appears.



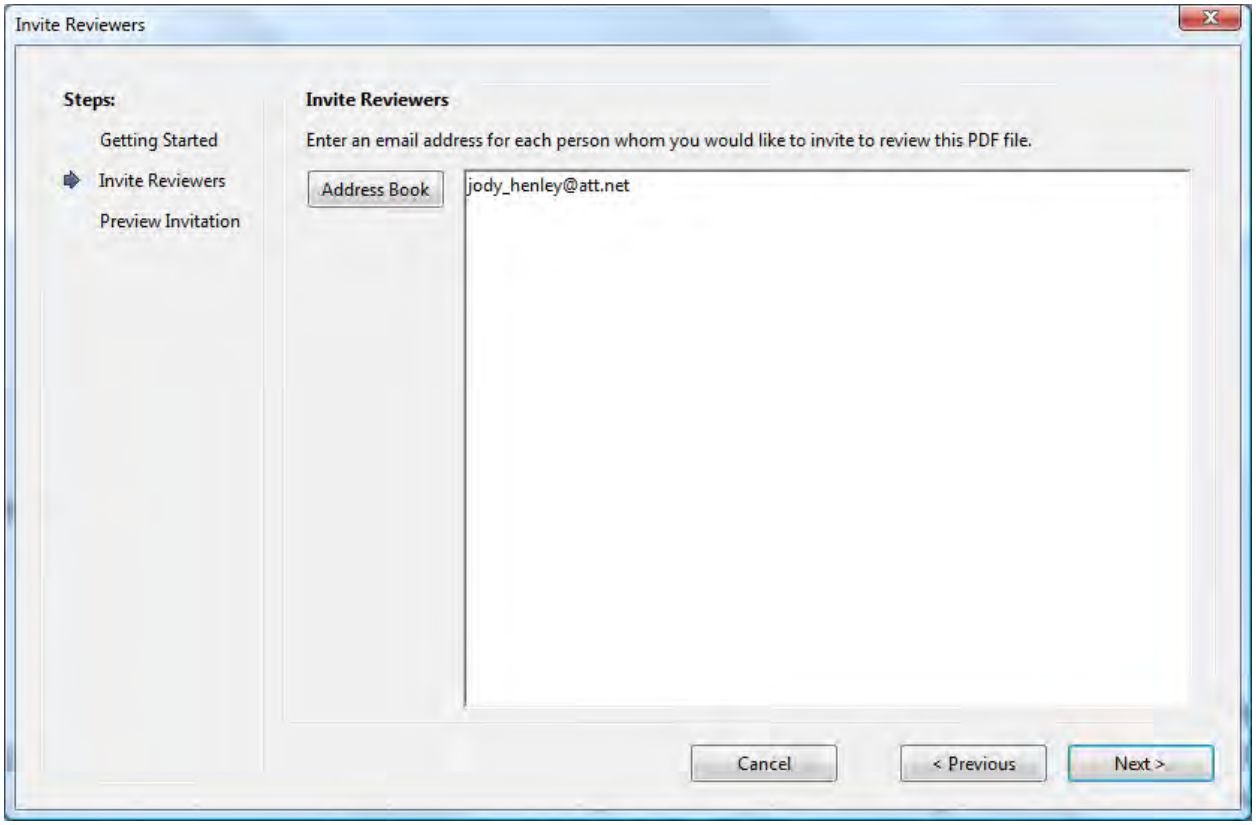
   You are now presented with this screen. If you have already opened the PDF you intend to work with, then it will be listed under "Specify a PDF...". Otherwise, you can choose the PDF you want to work with my clicking the **Browse** button. After the PDF you want is identified, click the **Next** button.

   In Acrobat X and XI, you initiate the process by clicking the Tools button on the right side ➔ Review ➔ Send for Email Review.

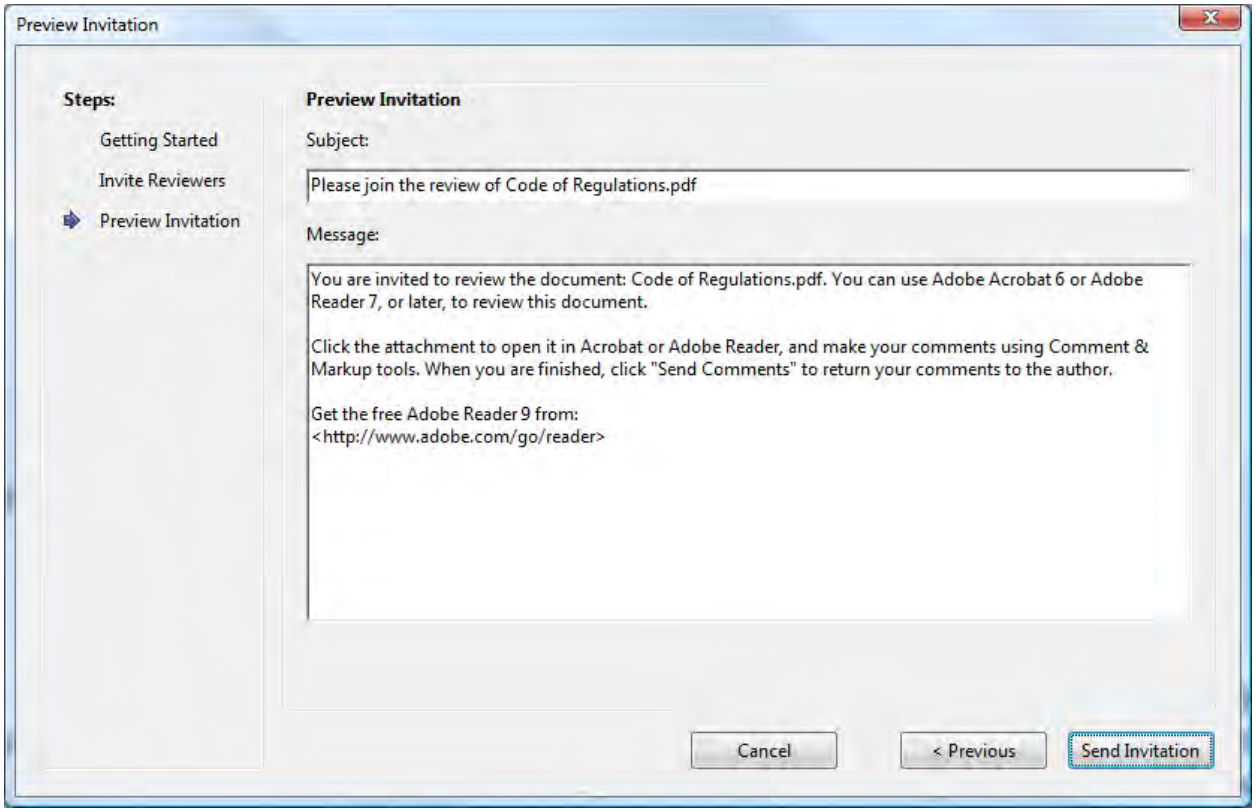
In Acrobat DC, you initiate the process by clicking the Send for Comments tool ➔ Send for Comments by Email button.



3. **Invite Reviewers**: If you click the **Address Book** button, Acrobat will take you to the Outlook address book and you can easily choose email addresses for the recipients. Otherwise, you can simply type email addresses in the window to the right of the **Address Book** button.


Invite Reviewers
Steps:
Getting Started
Invite Reviewers
Preview Invitation
Invite Reviewers
Enter an email address for each person whom you would like to invite to review this PDF file.
Address Book
jody_henley@att.net
Cancel
< Previous
Next >

4. **Preview Invitation**: Now you'll be presented with the dialog shown below. You'll notice that the instructions for the recipient are already setup by Adobe Acrobat. Click the **Send Invitation** button.

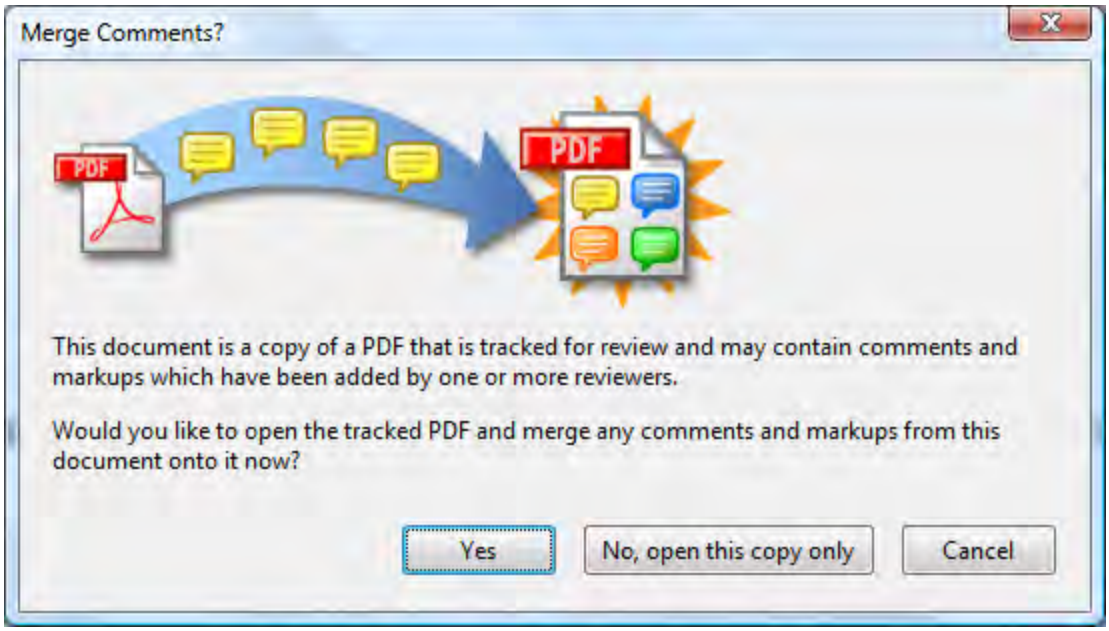


5. **Send Invitation**: Once you click the **Send Invitation** button in the previous dialog, Acrobat will automatically send out an email to the recipient(s).

   When the recipient opens the attachment to the foregoing email, they'll see a full explanation in Acrobat of what you've initiated and how it works.

   The "Commenting" toolbar automatically opens and gives the user the option for adding notes, inserting text, deleting text, etc., even if the recipient doesn't own the full version of Adobe Acrobat. After the recipient makes proposed changes, he/she can simply click the **Send Comments** button on the Commenting toolbar and Acrobat will attach the annotated PDF to an email and automatically send it back to you.

6. **Merge Comments**: When the PDF shows up in your inbox, double-click it. You'll be presented with the screen below providing you options for merging the sender's comments into your master.



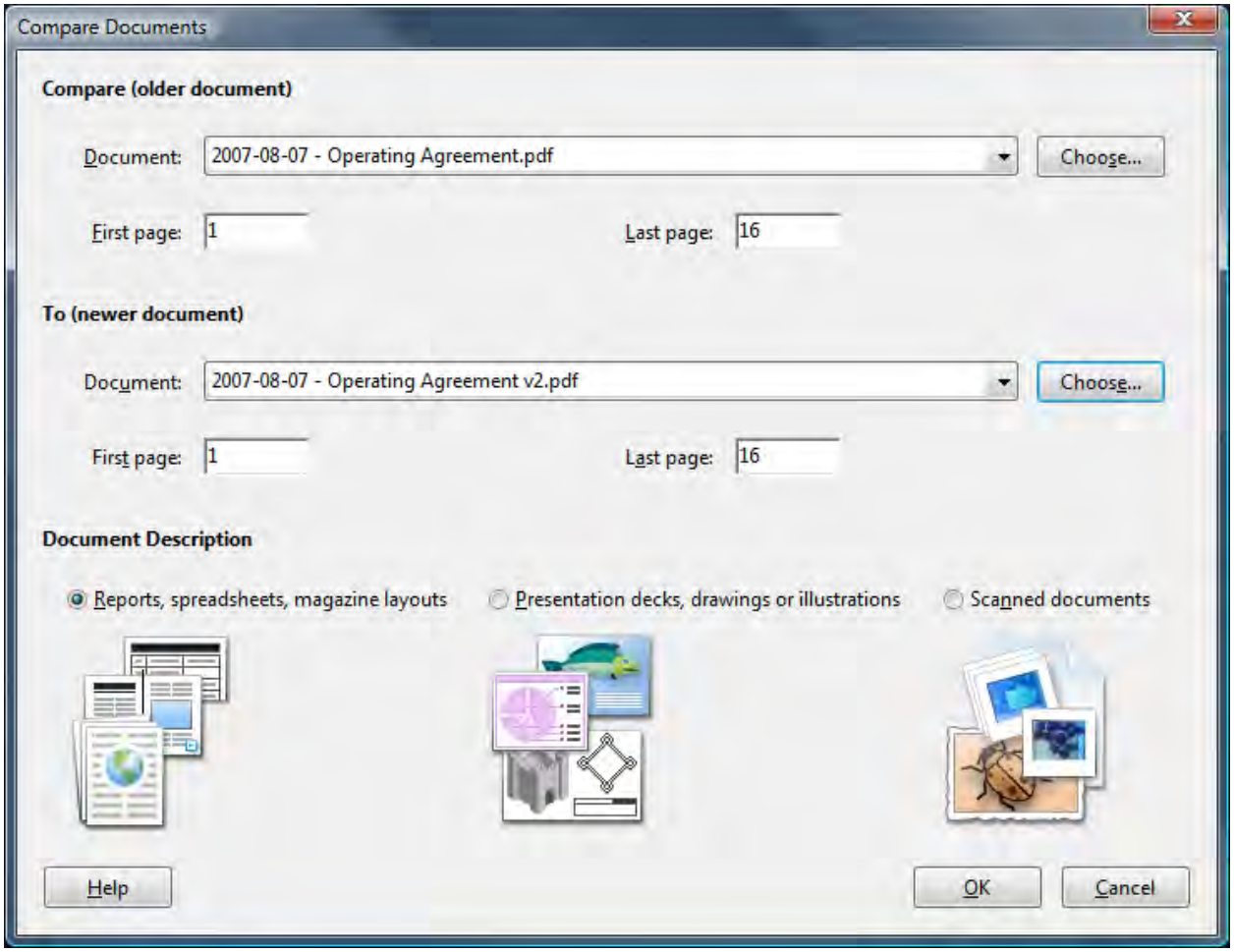
If the PDF you sent in the first place is still in the same location, you can add the sender's comments to your master with one click (or not). So a very important aspect of an email review is that you can send the same PDF document to as many people as you want and have them review it independently. Whenever they send back their comments, you can just merge them into your master PDF or save them as separate PDFs. Later, you can merge them into your master if you'd like (you don't have to do it as soon as the annotated PDF shows up).

Furthermore, if you decide not to merge the comments into the master at this point, you can always do it later by choosing "Merge Comments into Master PFD" from the Comments menu in Acrobat.

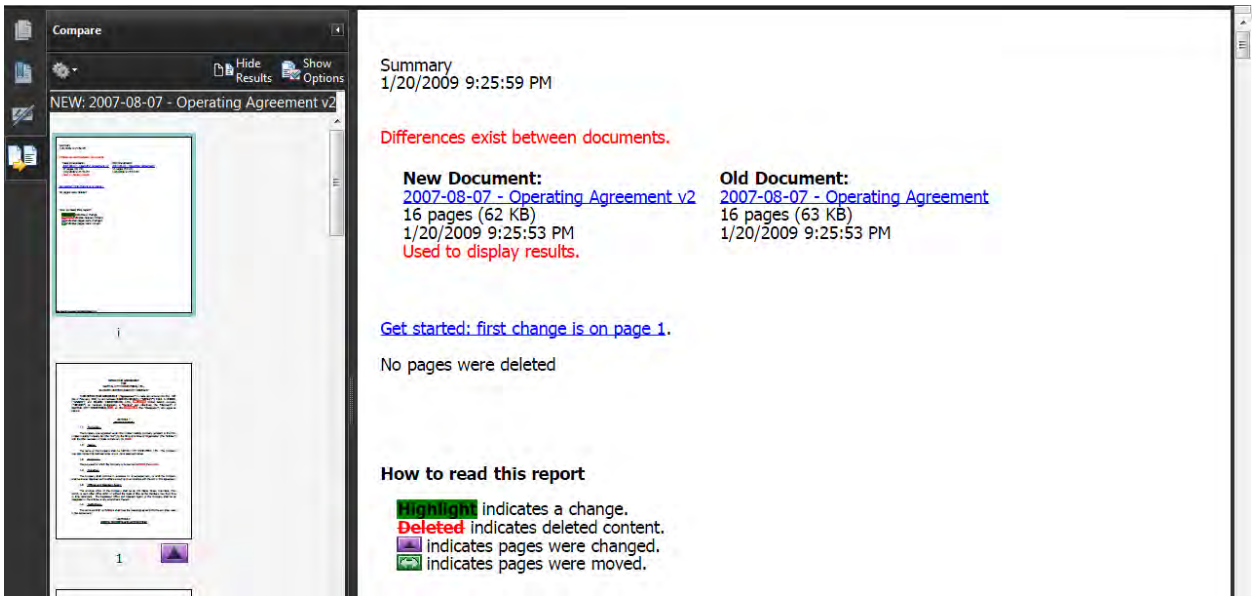
C. **Compare PDFs**: If you have two different versions of a PDF document, you can use Acrobat to compare them to one another. Note that this feature is available in Acrobat Pro only. Just follow these steps:

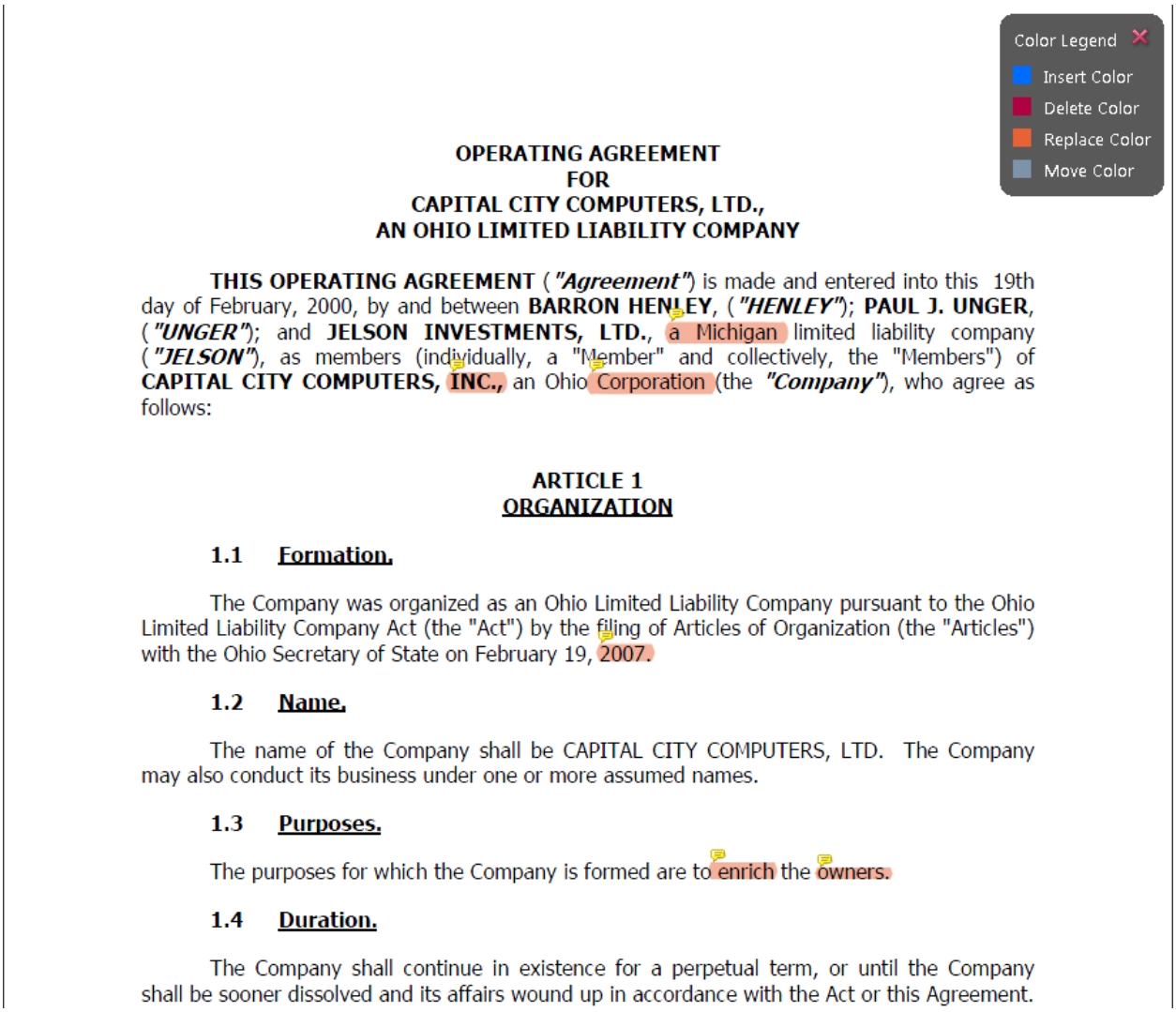
1. In Acrobat 9, click on the Document menu ➔ Compare Documents; in Acrobat X/XI/DC, click the View menu ➔ Compare Documents.

2. You will see a dialog like this in which you need to select the documents you're comparing and set your compare preferences. My recommendation would be to show Textual Differences in a Side by Side Report. You can experiment with the other settings, but I found these to render the most useful comparison report.



3. If you use the foregoing settings, you will be presented with a new document that identifies changes in the following manner:



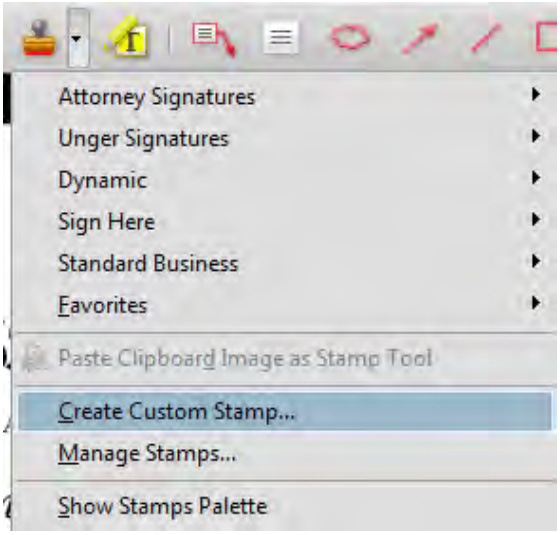


XII. **ELECTRONIC SIGNATURES USING THE STAMP TOOL**: This is a way to add your signature to a PDF as an image.

A. **Steps for Using a JPG File**: This is easy because almost any scanner can produce JPG files. However, there is a drawback with JPG files in that your stamp will have a white, square background. Therefore, it will obscure anything behind it. There is a way to avoid this problem, but it's a little more complicated (see paragraph XII.B. below).

1. Sign your name to a blank sheet of paper. Scan it and save it as a JPG. Open it in Microsoft Picture Manager. Select **Picture** and **Crop**. Reduce the size of the JPG to be as small as possible and still include your signature. Click OK and then Save. Note the location.

2. From the Stamp Tool in the Comment and Markup Toolbar select the drop-down menu and **Create Custom Stamp**.



3. Browse to the location of your saved signature from step one and change the "Files of type" designation at the bottom of the screen to JPG files. Open it and click OK. Create a new category called **Attorney Signatures** or **My Signatures** and enter your name in the **Name** field. Click OK.

B. **Steps for Using a PNG File**: The steps here are similar, but we're using a PNG file rather than a JPG. The benefit of doing this is that you can open a PNG file in Adobe Photoshop and remove the white background, thereby creating a signature stamp of the ink lines only. As such, you can drop it on a PDF and it won't obscure anything in the background with a big white square.

1. Sign your name to a blank sheet of paper. Scan it and save it as a JPG. Now you need Adobe Photoshop, Adobe Photoshop Elements or Gimp[4]. Assuming you have Photoshop Elements, open Elements and crop it

[4] Gimp is a free image editor program you can download from www.gimp.org.

(reduce its dimensions) and then save it as PNG[5] file. Select the white background and delete it, then save the file (note the location).

2. From the Stamp Tool in the Comment and Markup Toolbar in Acrobat, select the drop-down menu and **Create Custom Stamp**.

3. Browse to the location of your saved signature from step one and change the "Files of type" designation at the bottom of the screen to PNG files. Open it and click OK. Create a new category called **Attorney Signatures** or **My Signatures** and enter your name in the **Name** field. Click OK.

XIII. **FLATTENING PDFS**: If in a PDF you use the Typewriter tool, electronic signatures or any of the annotation tools described previously and send that PDF to someone who owns Acrobat Standard or Pro, they'll be able to select your annotations, move or delete them. *Flattening* a PDF means to move these annotations into the main layer of the PDF so that they will always print and cannot be easily selected, deleted or moved. There are two ways to flatten PDFs:

A. **Flatten By Printing to PDF Again**: If I have a PDF and have dropped my signature stamp onto it, I can flatten the signature by opening the PDF in Acrobat, clicking File menu ➔ Print ➔ choosing the Adobe PDF printer and creating another PDF from the PDF I just added my signature to. Of course, this is creating multiple copies of the same PDF.

B. **Acrobat 9 - Flatten By Adding a Menu Item To Do This in Acrobat**: This works only in Acrobat 9 and requires a bit more work, but is much easier to use once it is completed. For a full explanation of how this works, see Rick Borstein's blog article on the subject at http://tinyurl.com/2eld56u. Anyway, here are the steps:

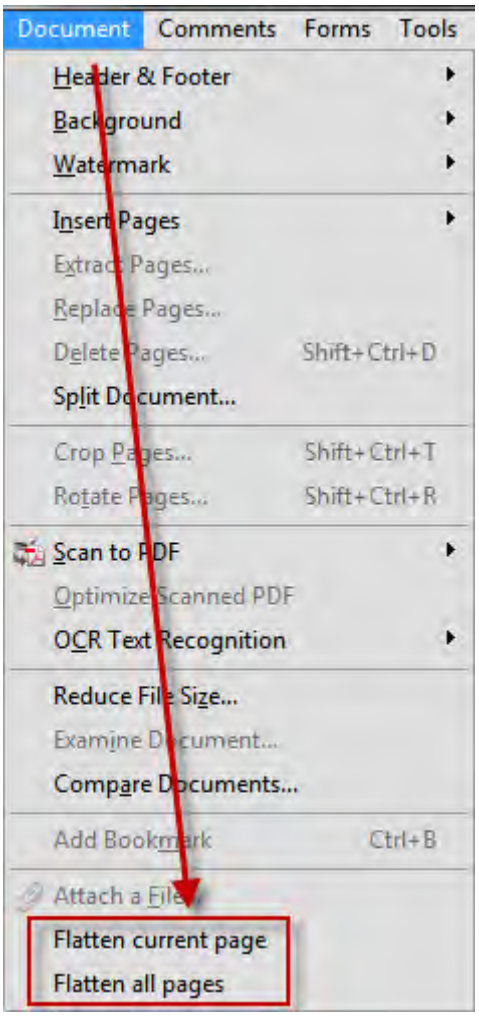
1. Exit Acrobat.

2. Download the file flatten.js file from the foregoing blog article at http://tinyurl.com/2d3ptwx (see Step 2 of the instructions on that site).

3. Store the file in C:\Program Files\Adobe\Acrobat 9.0\Acrobat\Javascripts.

4. Re-launch Acrobat. Under the Document menu, you should now see:

[5] For more information on PNG files, see http://www.fileinfo.com/extension/png.



C. **Acrobat X: Flatten Form Fields and Comments Using Acrobat X Actions**: This works only in Acrobat X. You can read the instructions here: http://tinyurl.com/7h7nx8s. The steps are as follows:

1. Download the Action (there is a link at the foregoing web site).

2. Open the resulting PDF. On the left side, you'll see an "attachment" called Flatten Fields and Comments.sequ. Right click and save it on your desktop (don't rename it).

3. Double click the attachment and click the Import button. That's it.

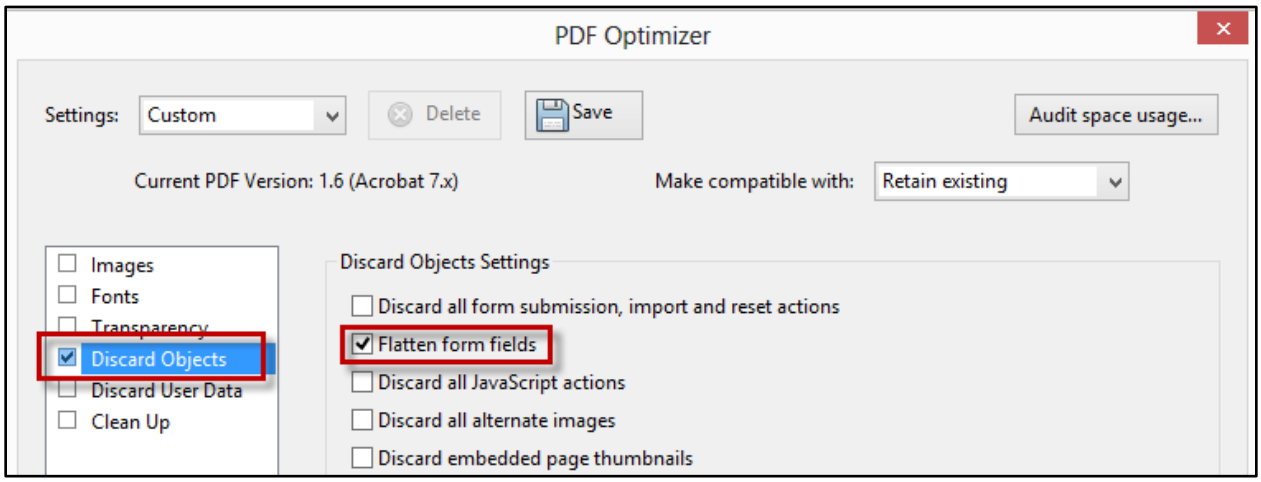
4. To use the feature, click on Tools>Action Wizard and you'll see an option to Flatten Fields and Comments.

D. **Flattening Fields Only Using Acrobat Professional**: If you have Adobe Acrobat Pro X or XI, then you can also flatten fields only by following these steps:

1. Open the PDF in Acrobat

2. Click the File menu ➔ Save As ➔ Optimized PDF

3. Uncheck all of the boxes on the left side of the subsequent dialog except "Discard Objects." Click on Discard Objects and check only "Flatten form fields" ➔ OK button.



XIV. **PDF ENCRYPTION AND SECURITY**: There are two types of encryption you can apply to a PDF if you have the Acrobat Standard or Professional: **Certificate Encryption** and **Password Encryption**. Certificate Encryption is too complicated for purposes of this seminar so we're going to focus on Password Encryption (which is very effective and much easier to apply). To apply Password Encryption to your PDF, follow these steps:

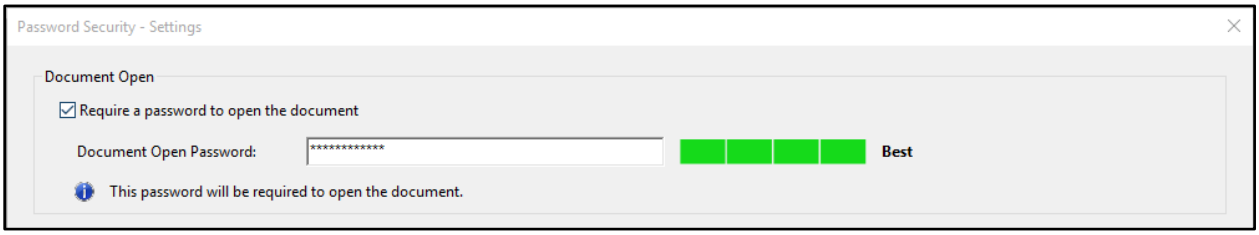
A. **Warning About PDF Passwords**: All Adobe products enforce the restrictions set by the Permissions password. However, because third-party products may not support or respect these settings, document recipients may be able to bypass some or all of the restrictions you set.

Important: If you forget a password, there's no way to recover it from the PDF. Consider keeping a backup copy of the PDF that isn't password-protected.

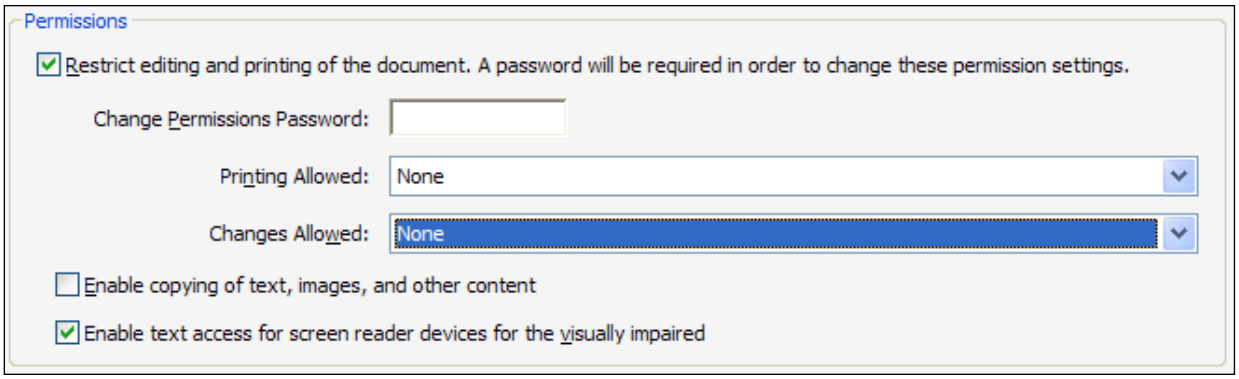
B. **Password Encryption**: In Acrobat 8 and 9, click the **Secure** button, then choose **Password Encrypt** from the menu that appears.

In Acrobat X/XI, click Tools ➔ Protection ➔ Encrypt ➔ Encrypt with Password. In Acrobat DC, click the Protect tool ➔ Encrypt button ➔Encrypt with Password.

1. **Set A Document Open Password**: As you can see in the foregoing dialog, you can require a password before the PDF can even be opened.



2. **Restrict Permissions**:



a. **Printing Allowed**: This setting allows you to control whether users can print; and if so, what level of printing they're allowed. Options include:

   i. **None**: Prevents users from printing the document.

   ii. **Low Resolution (150 dpi)**:Users can print at no higher than 150-dpi resolution. Printing may be slower because each page is printed as a bitmap image. This option is available only if the Compatibility option is set to Acrobat 5 (PDF 1.4) or later.

   iii. **High Resolution**: Lets users print at any resolution, directing high-quality vector output to PostScript and other printers that support advanced high-quality printing features.

b. **Changes Allowed**: This setting controls which editing actions are allowed.

i. **None**: Prevents users from making any changes to the document, such as filling in form fields and adding comments.

ii. **Inserting, Deleting, And Rotating Pages**: Allows users to insert, delete, and rotate pages, and create bookmarks and thumbnails. This is only available for high (128-bit RC4 or AES) encryption.

iii. **Filling in Form Fields and Signing Existing Signature Fields**: This allows users fill in forms and add digital signatures. This option does not allow users to add comments or create form fields (only available for high encryption).

iv. **Commenting, Filling In Form Fields, And Signing Existing Signature Fields**: Allows users to add comments, digital signatures and fill in forms. This option does not allow users to move page objects or create form fields.

v. **Any Except Extracting Pages**: Allows users edit the document, create and fill in form fields, and add comments and digital signatures.

c. **Enable Copying of Text, Images, and Other Content**: This option allows users to select and copy the contents of a PDF.

d. **Enable Text Access For Screen Reader Devices For The Visually Impaired**: This allows visually impaired users to read the document with screen readers, but doesn't allow users to copy or extract the document's contents (only available for high encryption).

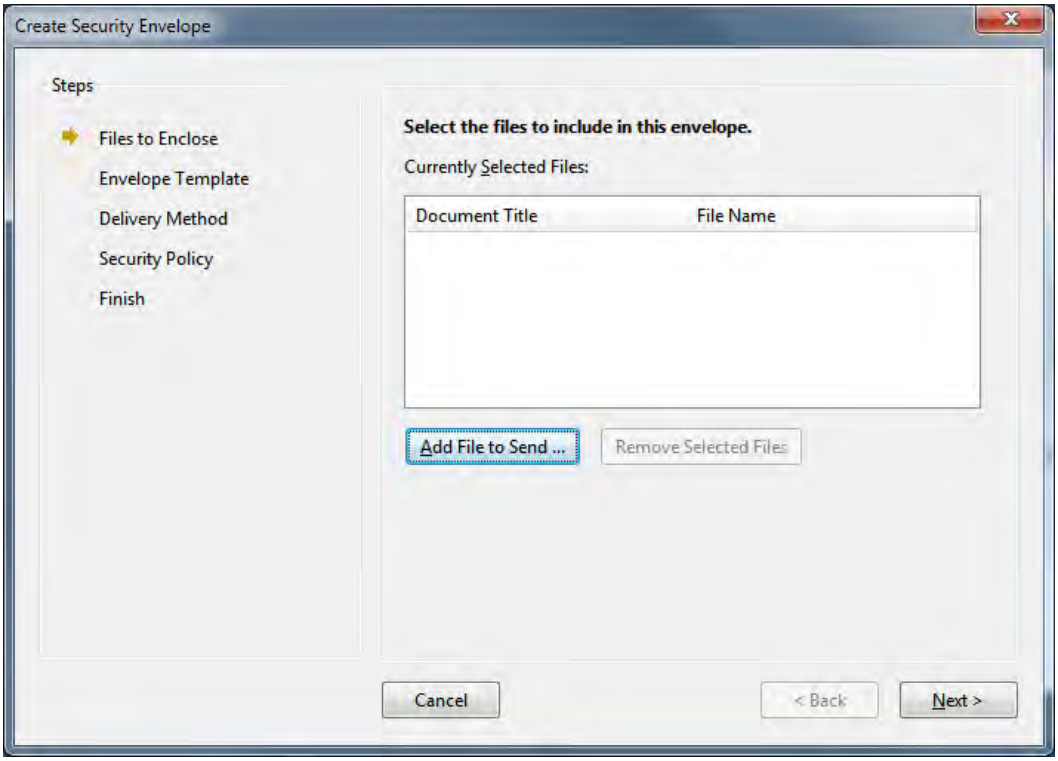
3. **Choose Compatibility**: Generally, the lower the version of Acrobat you choose for compatibility, the less secure your PDF will be. However, be aware that anyone using an earlier version of Acrobat cannot open a PDF document with a higher compatibility setting. For example, if you select the "Acrobat 8 and Later" option, the document cannot be opened in Acrobat 7.0 or earlier. My recommendation would be to make your compatibility version 8 or 9. If someone is still using Acrobat 7 or prior, they can easily download the current version of Reader for free (and they should).

C. Security Envelopes:

1. **What They Are**: A security envelope is a way to take a group of otherwise unsecured electronic files and encrypt them in a secure container which can be opened with a password.

2. **How to Create A Security Envelope**: Just follow these steps:

   a. In Acrobat 9, click Advanced menu ➔ Security ➔ Create Security Envelope; or in Acrobat X/XI, click Tools ➔ Protection ➔ More Protection ➔ Create Security Envelope; or in Acrobat DC, click the Protect tool ➔ More Options button ➔ Create a Security Envelope.



   b. Click the Add Files To Send button, browse to the files you want to include, select them and click the Open button. Now click Next.

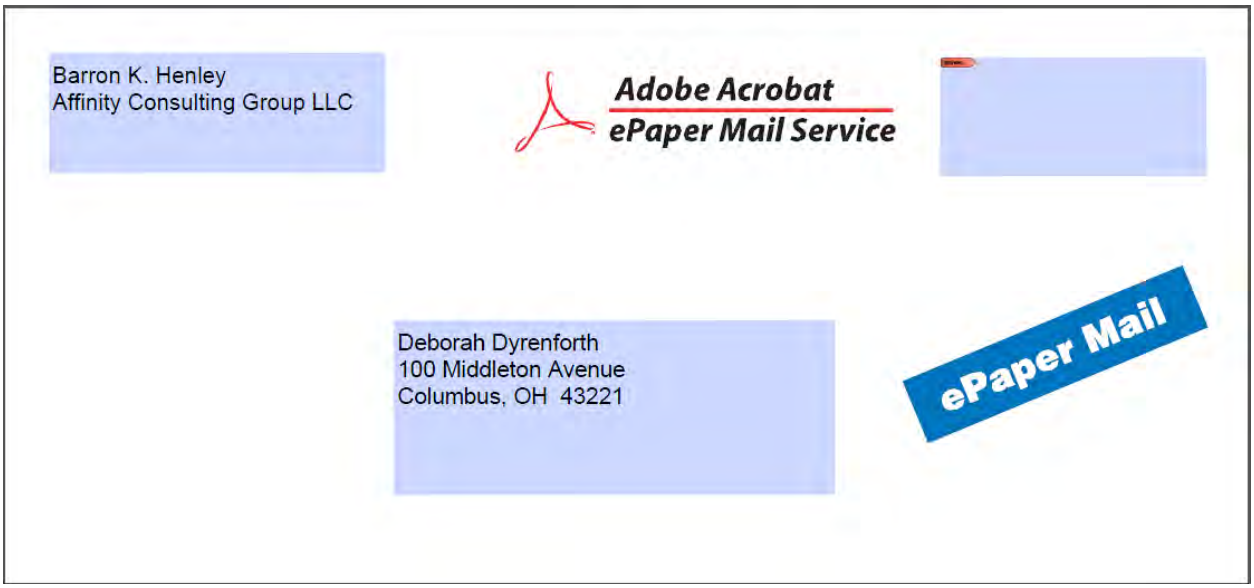
   c. Select an envelope template such as eEnvelope with Date Stamp and click Next.

   d. In the next dialog, choose "Send the envelope later" and click Next.

   e. Now you're at a dialog where you can select a security policy. Check the box that says **Show all policies** ➔ choose Encrypt with Password ➔ Next ➔ Finish.

f. Now Acrobat will ask you for a password. Check the box that says **Require a password to open the document** and enter the password in the box provided. Click OK → OK. The Security Envelope will now appear on your screen. Customize it as you see fit.

g. Click the Save button on the Acrobat Toolbar and it's ready to send! When the recipient tries to open your PDF, they'll have to enter the password you set up.



3. **Creating A Custom Envelope With Your Logo and Information On It**: This is a bit beyond the scope of this class, but it can definitely be done. For instructions on how to do it, see Custom Security Envelopes by Rick Borstein which you can access here: http://tinyurl.com/82j5kf7.

XV. **ELIMINATING PDF HIDDEN CONTENT**: People often mistakenly assume that PDFs have no metadata. This is not true. In fact, Acrobat 9, X, XI and DC all have a feature which allows you to easily find and remove hidden information from a document that you don't want, such as hidden text, metadata, comments, and attachments. If you want to examine your PDF, follow these steps:

A. **Steps for Acrobat 8 & 9**: Click Document menu → Examine Document. If any hidden items are found, they are listed in the Examine Document dialog box with a selected check box beside each item. Make sure that the check boxes are selected only for the items that you want to remove from the document. The following is an explanation of each item.

1. **Metadata**: Metadata includes information about the document and its contents, such as the author's name, keywords, and copyright information,

that can be used by search utilities. To view metadata, choose File menu ➔ Properties.

2. **File Attachments**: Files of any format can be attached to the PDF as an attachment. To view attachments, choose View menu ➔ Navigation Panel ➔ Attachments.

3. **Annotations And Comments**: This includes all comments which were added to the PDF using the comment and markup tools, including files attached as comments. To view comments, choose View ➔ Navigation Panel ➔ Comments.

4. **Form Field Logic Or Actions**: This item includes form fields (including signature fields), and all actions and calculations associated with form fields. If you remove this item, all form fields are flattened and can no longer be filled out, edited, or signed.

5. **Hidden Text**: This option indicates text in the PDF that is either transparent, covered up by other content, or the same color as the background. To view hidden text, click Preview. Click the double arrow buttons to navigate pages that contain hidden text, and select options to show hidden text, visible text, or both.

6. **Hidden Layers**: PDFs can contain multiple layers that can be shown or hidden. Removing hidden layers removes these layers from the PDF and flattens remaining layers into a single layer. To view layers, choose View menu ➔ Navigation Panel ➔ Layers.

7. **Bookmarks**: Bookmarks are links with representational text that open specific pages in the PDF. To view bookmarks, choose View menu ➔ Navigation Panel ➔ Bookmarks.

8. **Embedded Search Index**: An embedded search index speeds up searches in the file. To determine if the PDF contains a search index, choose Advanced menu ➔ Document Processing ➔ Manage Embedded Index. Removing indexes decreases file size but increases search time for the PDF.

9. **Deleted Hidden Page And Image Content**: PDFs sometimes retain content that has been removed and which is no longer visible, such as cropped or deleted pages, or deleted images.

10. **Select Items to Remove**: Click Remove All Checked Items to delete selected items from the file, and click OK. When you remove checked items, additional items are automatically removed from the document: digital signatures; document information added by third-party plug-ins and

applications; and special features that enable Adobe Reader users to review, sign, and fill in PDF documents.

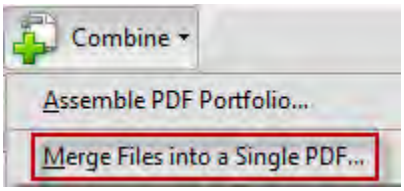
11. **Save File**: Choose File menu → Save, and specify a filename and location. If you don't want to overwrite the original file, save the file to a different name, location, or both. The selected content is permanently removed when you save the file. If you close the file without saving it, you must repeat this process, making sure to save the file.

B. **Steps for Acrobat X/XI**: Click the Tools button → Protection → click either Remove Hidden Information (which shows you what it finds and gives you an opportunity to keep some of it) or Sanitize Document (which removes everything without asking you).

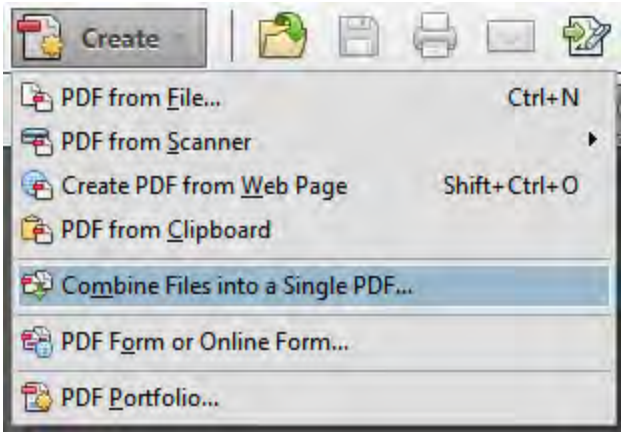
C. **Steps for Acrobat DC**: Click the Redact tool → click either Remove Hidden Information (which shows you what it finds and gives you an opportunity to keep some of it) or Sanitize Document (which removes everything without asking you).

XVI. **<u>COMBINING PDFS</u>**: There are two ways to combine PDFs: 1) create one long PDF from multiple PDFs, or 2) create a PDF Portfolio (Acrobat v9+). Portfolios are not one long PDF. Instead, they're PDFs which contain multiple other files and those component files retain their uniqueness and are not merged together. With Portfolios, they can be many different file types including Word, Excel, photographs (JPG files) and the like.

A. **Merge Files Into a Single PDF**: The first thing to be aware of is that you don't have to feed Acrobat all PDFs in order to merge files into a single PDF. In other words, you could have a Word file, an Excel spreadsheet and a PDF. Acrobat will convert the non-PDF files into PDFs before merging them into a single PDF file. To do this in Acrobat 9, simply click the Combine button → Merge Files into a Single PDF.



In Acrobat X/XI, click the Create button → Combine Files into a Single PDF.



In Acrobat DC, click the File menu ➔ Create ➔ Combine Files Into A Single PDF. You can also do this using the Combine Files tool for this.

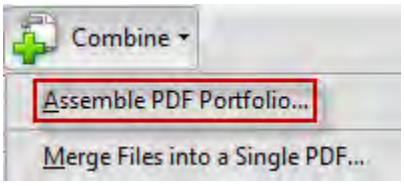
B. PDF Portfolios:

1. **What They Are**: A PDF Portfolio contains multiple files assembled into an integrated PDF unit (a single PDF file). The files contained within a PDF Portfolio can be in a wide variety of file types from text documents (i.e., Microsoft Word), e-mail messages, spreadsheets, CAD drawings, and PowerPoint presentations. The original files retain their characteristics as separate files but are compressed into a single PDF Portfolio file. You can open, read, edit, and format each component file independently of the other component files in the PDF Portfolio. This feature is available from within Acrobat Professional only and didn't exist at all prior to version 9.

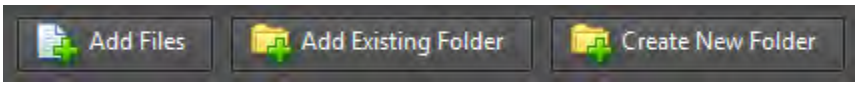
2. **Benefits of PDF Portfolios**: You can view the component PDFs like pages in a book and quickly flip between them by using the built-in navigation tools which appear when you open one. Furthermore, they can be sorted, printed independently and searched. Any common type of document can be included in a Portfolio (not just PDFs). Therefore, it is a fantastic way to pull together many disparate electronic items into one container.

3. **How To Create a PDF Portfolio in Acrobat 9**: To create a Portfolio, follow these steps:

   a. In Acrobat 9, click the Combine button ➔ Assemble PDF Portfolio

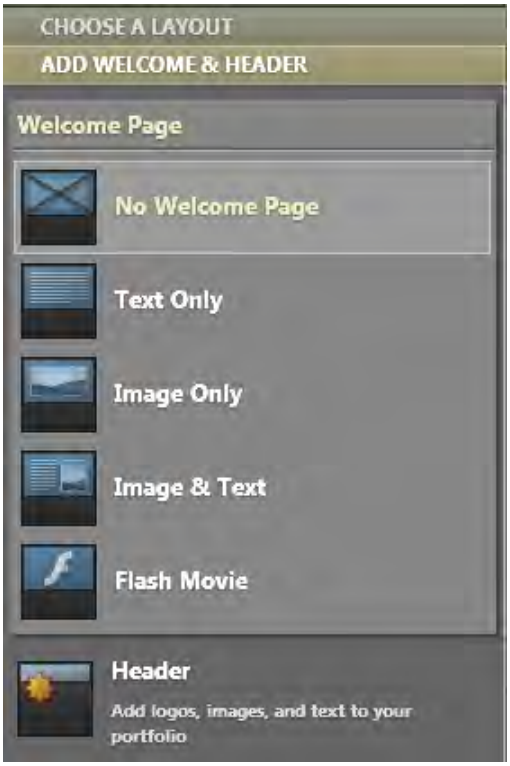


b. In the next screen, click Add Files, Add Existing Folder or Create New Folder and choose the files you want to include.



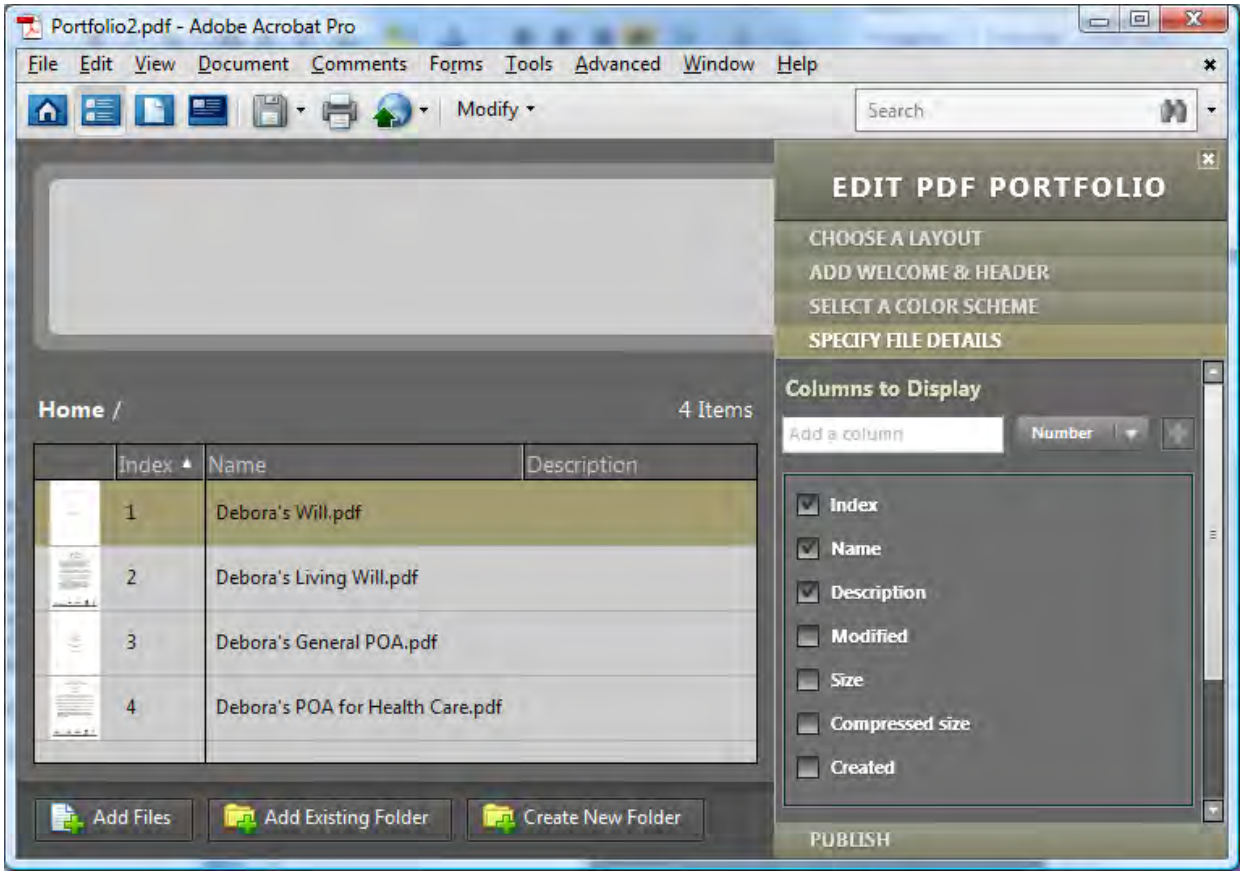
c. Now choose a Basic Layout:

d. Choose a Welcome Page or Header:

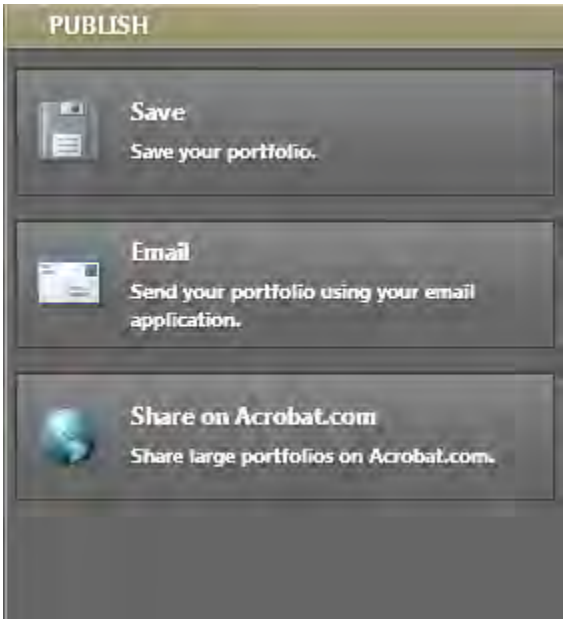


e. Select a color scheme (or make one).

f. In order to get the files in the order you want, you'll need to add a column in the Specify File Details screen. I typically make one called Index and then number the files so they'll appear in the order I want.



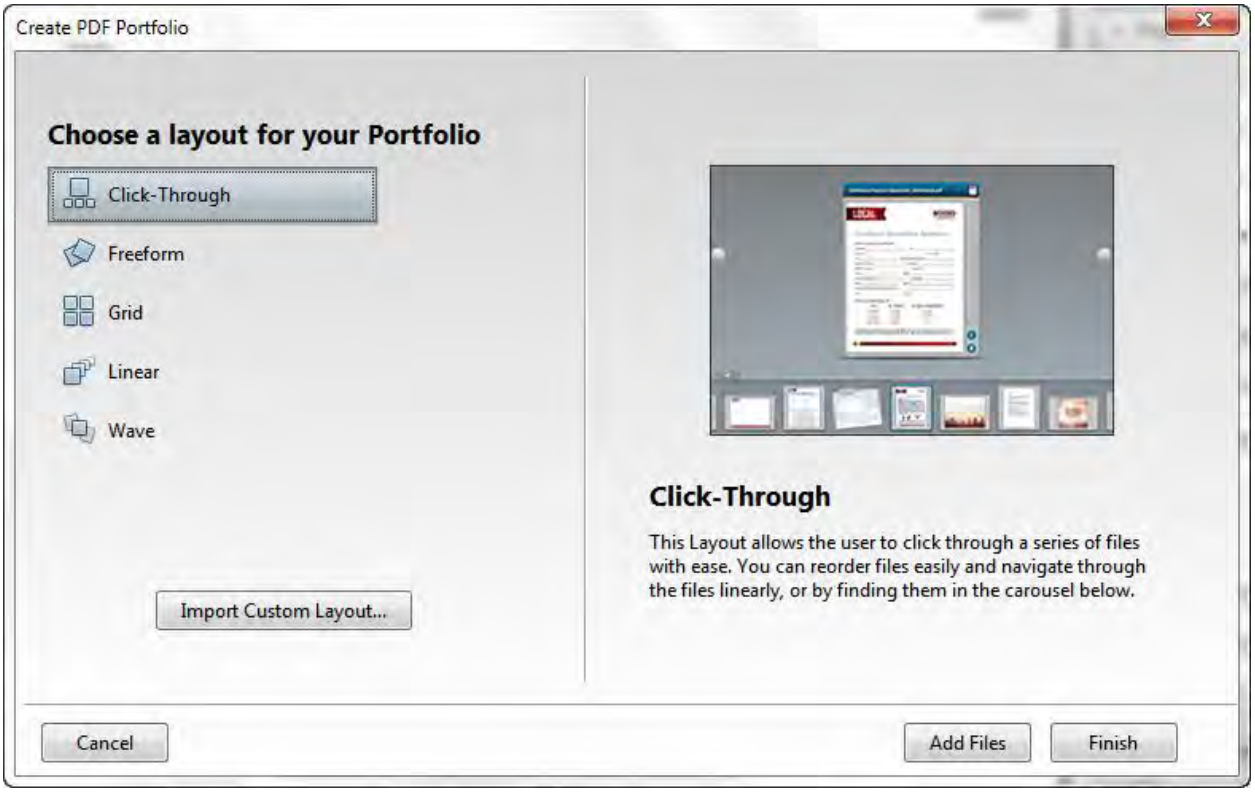
g. Finally, Publish!



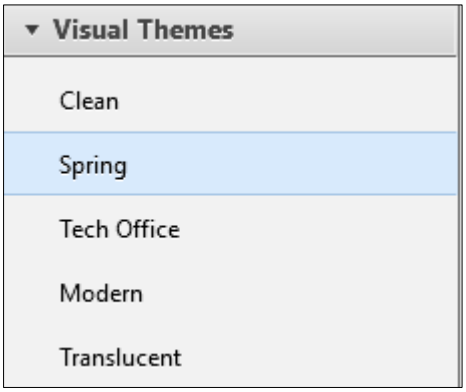
4. **How to Create a PDF Portfolio in Acrobat X and XI**:

a. Click the Create button ➔ PDF Portfolio

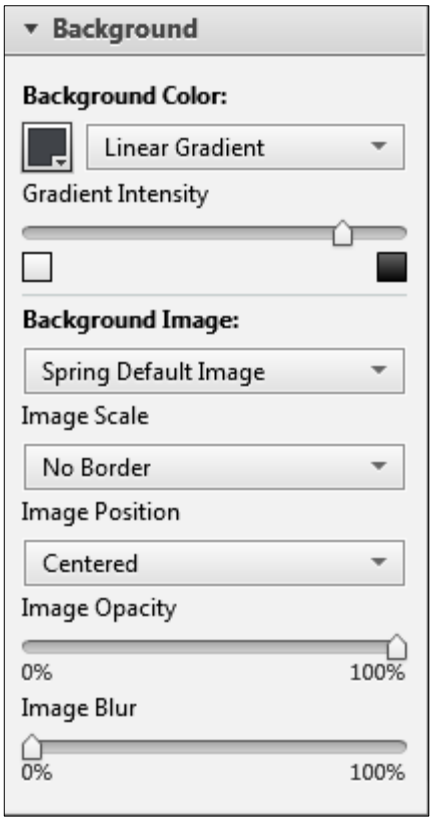
b. Choose a layout (try Click-Through); and click the Add Files button in the same dialog. Browse to and select the files you want to include.



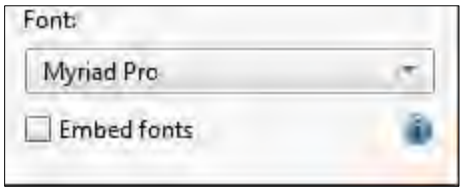
c. Now pick a Visual Theme & Color Palette:



d. Tweak the Background if you like:



e. Finally, you can change the font if you'd like:



f. To control the order the files appear, click the Details button and you can drag them into position (top = left).

g. Click File menu ➔ Save Portfolio and you're done!

5. **How To Create a PDF Portfolio in Acrobat DC**: First of all, all of the fancy options shown above in prior versions are gone. You can still create a portfolio, but it's a kind of plain vanilla version. However, I find them easier to navigate. Anyway, to create one, just click the File menu ➔ Create ➔ PDF Portfolio. Add your files and click the Create button.

XVII. DIGITAL SIGNATURES:

A. **What They Are**: This is unquestionably one of the most confusing topics I've ever encountered in legal technology, mostly because any explanation of it is techno-babble overload. So I can't avoid all of the techno-speak when explaining it, but I'll try to limit this to what you need to know.

A digital signature is like a conventional handwritten signature in that it identifies the person signing a document. Key benefits of digital signatures are:

1. Unlike a handwritten signature, a digital signature is difficult to forge because it contains encrypted information that is unique to the signer.

2. Recipients can easily verify the authenticity of the digital signature (you simply click on the signature in a PDF to verify it).

3. Once digitally signed, neither the signature nor the document signed can be altered without detection.

4. Digital signatures are legally binding in the U.S. so an electronic signer cannot later deny responsibility or that they actually signed the electronic document.

B. **Digital Signatures Are Not Electronic Signatures**: *Digital signatures* are created and verified by cryptography, the branch of applied mathematics that concerns itself with transforming messages into seemingly unintelligible forms and back again. The technology behind digital signatures is an industry standard known as Public Key Infrastructure (PKI), which guarantees data integrity and non-repudiation of transactions. The digital signature cannot be copied, tampered or altered. On the other hand, *Electronic signatures* are electronic images that are physically or logically attached to the signed data (see paragraph XII. on page 37 above). Adding a sentence "I, Barron Henley, sign this document" is good enough to be considered as an electronic signature; however, it is clear that electronic signatures are easy to forge, unlike digital signatures.

C. **How They Work**: The American Bar Association Section of Science and Technology Information Security Committee has released a Digital Signature Guidelines Tutorial which you can buy for $35 here: http://tinyurl.com/7x2q2dz. It contains an excellent, but technical, explanation of digital signatures, how they work and what is involved. Another good explanation can be found here for free: http://youdzone.com/signature.html.

D. **How You Obtain a Digital Signature**: You can create your own using Adobe Acrobat. See http://tinyurl.com/2u9hrh for instructions for this. In the alternative, you can use a third party, some of which verify your identity

beforehand. For a list of Adobe approved vendors, see http://tinyurl.com/2jd9cf. You can also find plenty of options if you google ["digital signature" pdf].

XVIII. BOOKMARKS AND LINKS IN PDFS FOR QUICK NAVIGATION:

A. Creating Bookmarks: You can create bookmarks in your PDFs for quick navigation.

1. First, open your PDF. Hit F4 to open the Navigation Pane and you'll see an icon for bookmarks. Just click on it to reveal the bookmarks in your document (if any). The bookmarks button looks like this:

2. Select the text in the document you'd like to create a bookmark for. Right-click it, then choose Add Bookmark.

3. Name the bookmark and you're done. You can now navigate back to that spot by click the bookmark name in the Bookmark panel on the left side of the document.

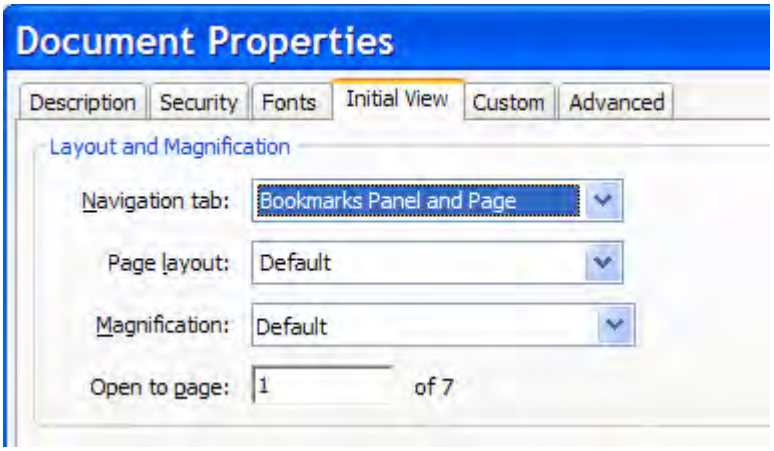
B. Bookmark Customizations: Here are a couple of things about bookmarks you might find useful.

1. **Change the Order of Bookmarks**: If your bookmarks aren't in the order you want in the bookmark pane, simply hold down on your left mouse button and you can drag them into the correct position.

2. **Change the Format of the Bookmark Link**: You can also make a bookmark bold, italic or bold & italic. By default, they're "plain."

C. Making Bookmarks Visible Immediately Upon Opening a PDF: If you want the bookmarks to be visible when the judge or someone else opens your brief, follow these steps:

1. Click on File menu ➔ Properties.



2. Click on the Initial View tab.

3. Choose Bookmarks Panel and Page

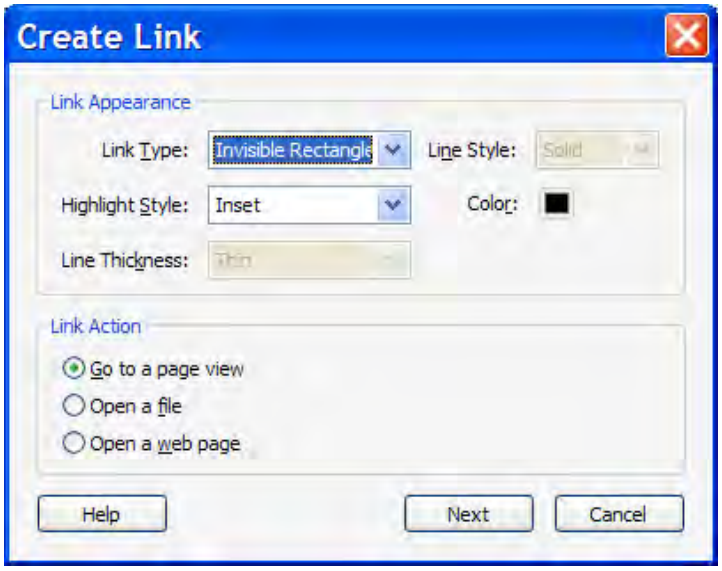
4. Click OK.

D. **Other Controls for the Initial View**: Also note that you can control the initial page layout, magnification and what page a PDF opens to.

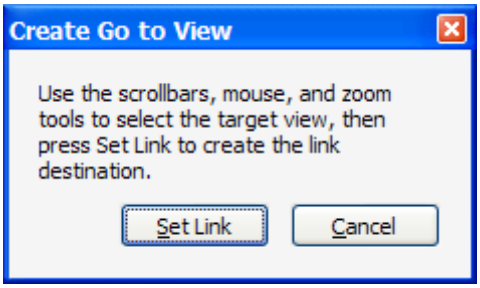
E. **Creating Links to Bookmarks**: Now that you've created a bookmark, you might want to create hyperlinks to it from other text in your PDF. In order to do this, follow these steps:

1. Select the text you'd like to link to a bookmark in your PDF, right click it and choose **Create Link**.

2. Switch your link type to Invisible Rectangle unless you want the box to be visible in your PDF. Leave the Link Action on "Go to a page view" and click Next.



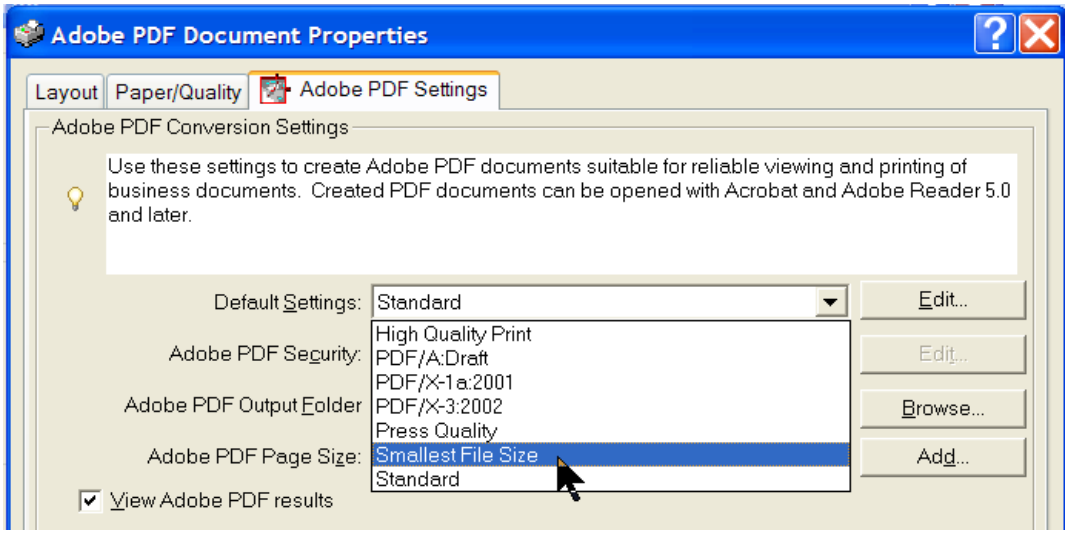
3. Now click on the name of the Bookmark in the Bookmark panel that you want to link to; then click Set Link.



4. You're done. Test it to make sure it works.

XIX. **<u>REDUCING PDF FILE SIZE</u>**: If you create PDFs that are too big (in terms of bytes), it will make it difficult for people to download or work with them. Therefore, it's important that you understand how to create smaller PDFs initially and how to shrink existing PDFs.

A. **From Your Word Processor – Creating Smaller PDFs**: When printing to PDF, click on the **Properties** button. Now click the **Adobe PDF Settings** tab and under **Default Settings**, choose **Smallest File Size**, then click **OK** at the bottom of the dialog. Now finish creating your PDF.



B. **From a Scanner**: File size when you scan a document to a PDF is impacted by three things: 1) color mode, 2) dpi and 3) number of pages.

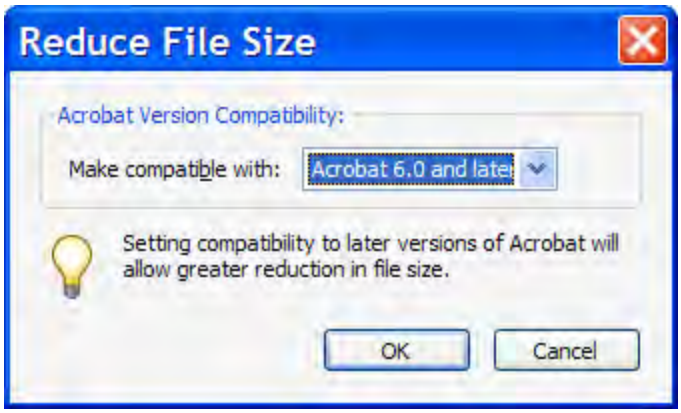
1. **Color Mode**: Most scanners will allow you to scan in color, black and white or grayscale. Even if the document you're scanning has no color in it, the resulting scanned document will be very large if you scan with color mode set to color. The same thing is true with grayscale. To keep file size small, you want your scanner's color mode set to black and white.

2. **DPI**: DPI stands for dots per inch and this is the resolution your scanner is set to. The higher the dpi, the better the quality. However, as you increase dpi, you also increase file size. Most scanners can scan from 100 to 1,200 dpi. Generally, the best balance between quality and file size is 300 dpi.

3. **Number of Pages**: Obviously, the more pages you scan, the bigger the resulting file size. If you scan at 300 dpi black and white and the file is still too large, then there are still ways to reduce the file size as described below.

C. **Shrinking the File Size of an Existing PDF in Acrobat 8/9**: There are two easy ways to reduce the size of an existing PDF, both of which are accessed under the Document menu in Acrobat 8 and 9.

1. **Reduce File Size Option**: Click Document menu → Reduce File Size. This command resamples and recompresses images, removes embedded fonts, compresses document structure, and cleans up elements such as invalid bookmarks. In the drop-down adjacent to "Compatible with:", choose Acrobat 6.0 and later unless you're certain someone will be trying to open it using an earlier version. If you're certain that everyone accessing the PDF will be using Acrobat 7 or later, then choose that.



NOTES:

- If the file size is already as small as possible, this command has no effect.

- Reducing the file size of a digitally signed document removes the signature.

2. **Optimizing Scanned PDF Option**: Scanned documents can often be made much smaller. The Optimization Options dialog box for image settings controls how scanned images are filtered and compressed for the PDF. Default settings are suitable for a wide range of document pages, but you can also customize the settings for higher quality images, smaller file sizes, or other scanning issues. Just open the PDF you want to optimize, click the Document menu ➔ Optimize Scanned PDF.

D. Shrinking the File Size of an Existing PDF in Acrobat X/XI:

1. **Reduced Size PDF**: Open the PDF you want to shrink ➔ File menu ➔ Save As ➔ Reduced Size PDF ➔ choose compatibility ➔ OK.

2. **Optimizing Scanned PDF**: This is the same option outlined above for Acrobat 8 and 9. You get to it by clicking the Tools button ➔ Document Processing ➔ Optimize Scanned PDF.

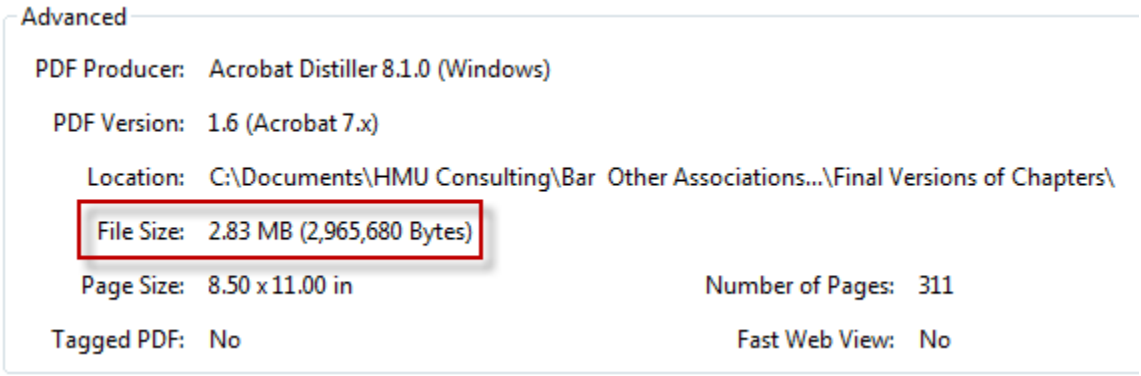
E. Shrinking the File Size of an Existing PDF in Acrobat DC:

1. **Reduced Size PDF**: Open the PDF you want to shrink ➔ File menu ➔ Save As Other ➔ Reduced Size PDF ➔ choose compatibility (recommend version 7) ➔ OK.

2. **Optimizing Scanned PDF**: Open the PDF you want to optimize ➔ File menu ➔ Save As Other ➔ Optimized PDF.

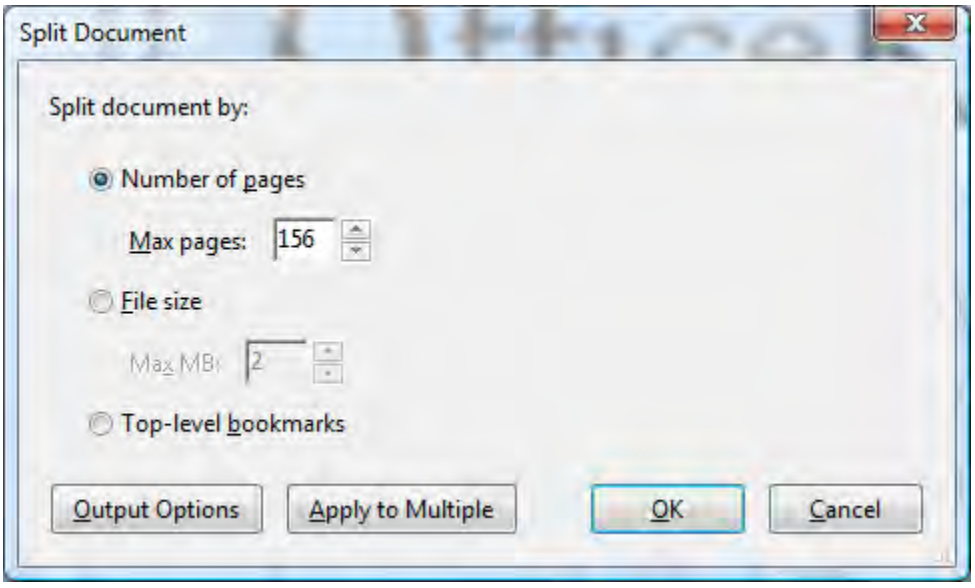
F. Splitting PDFs That Are Too Large:

1. **Determine the Size of Your PDF**: First, you need to determine how big your PDF is. In order to do that, open the PDF in Acrobat, click the File menu ➔ Properties ➔ Description tab and you'll see a File Size listed under Advanced.



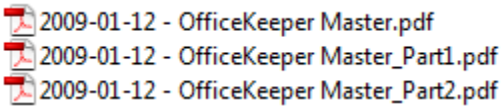
Some courts require that PDFs are less than 2 megabytes so if your PDF is larger than that, you may have to split it in order to get each piece below the 2 MB threshold.

2. **Method with Acrobat 9**: To perform the foregoing exercise of splitting a 311 page file, just click the Document menu ➔ Split Document.



As you can see, you can split by pages, file size or bookmarks. By default, Acrobat will not touch your original file, but will create new files representing the pieces of your large document in the same folder where the original document is stored. Since my original document was called

2009-01-12 - OfficeKeeper Master, Acrobat created the two additional files you see below.

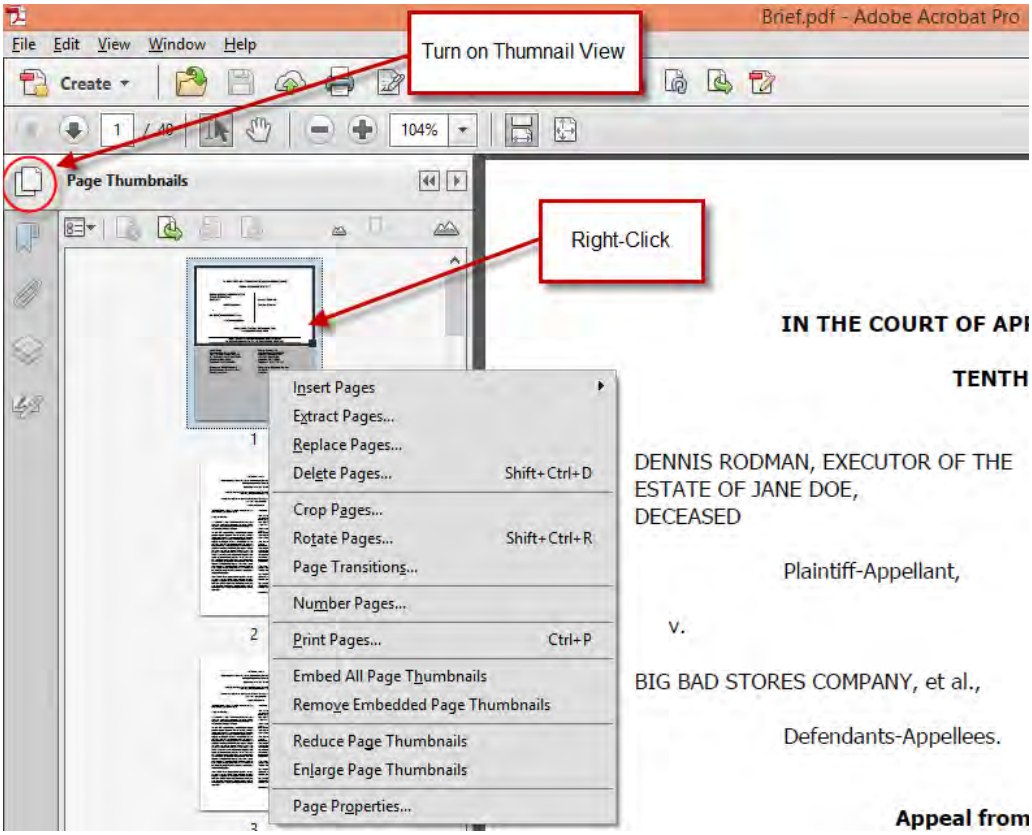


3. **Method with Acrobat X/XI**: Click the Tools button ➔ Pages ➔ Split Document.

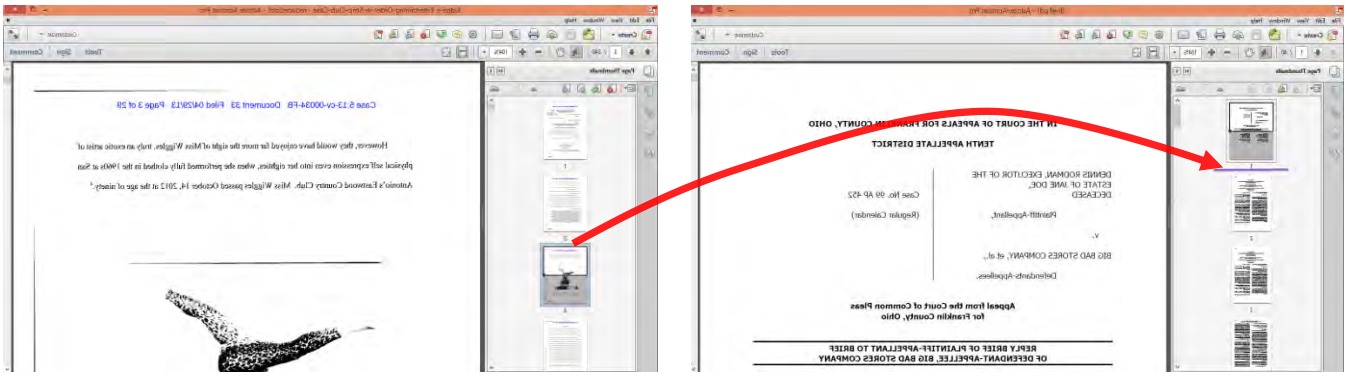
4. **Method With Acrobat DC**: Open the Organize Pages tool from the Tools Pane ➔ Split button.

XX. **<u>ADDING, REMOVING, REPLACING PDF PAGES IN ACROBAT</u>**: You can manipulate PDFs easily in Acrobat through the Task Pane or through the Thumbnail View in the Navigation Pane.

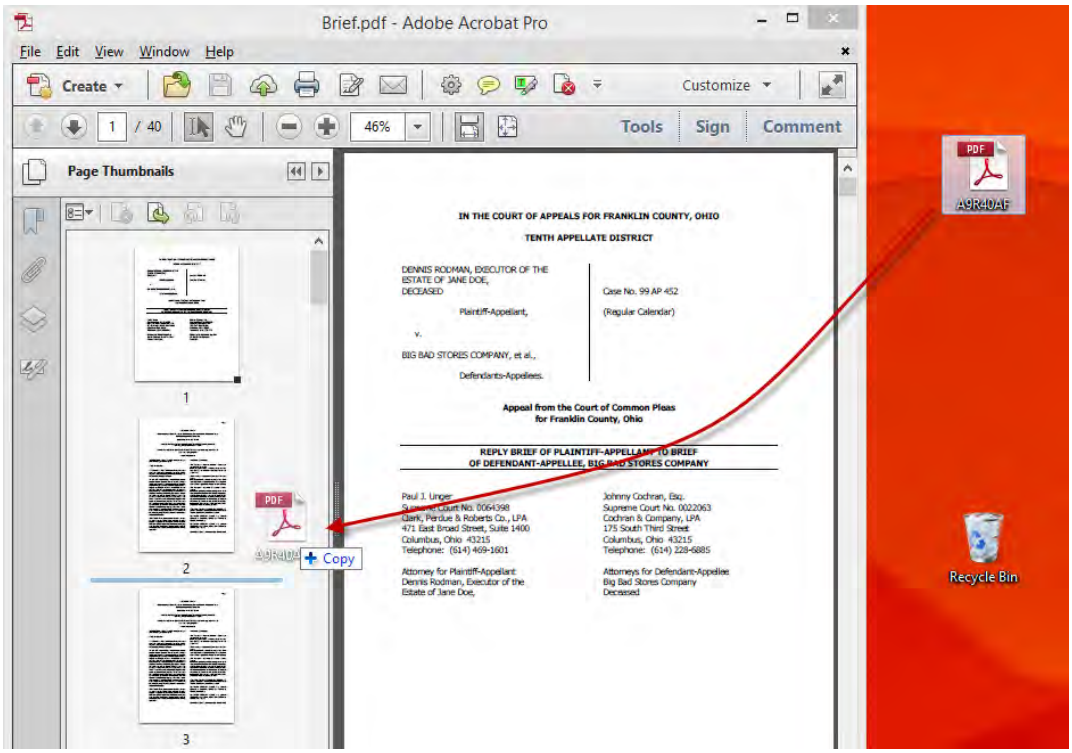
A. **Manipulations via Thumbnails in the Navigation Pane**: If you have a document management system like Worldox, saving/profiling each document temporarily just to insert it into another document can be very time consuming! Instead, just open each PDF and turn on the Thumbnail View by clicking on the **thumbnail icon** located in the Navigation Pane on the left. From the thumbnail view, you can delete, move, replace, and extract pages.



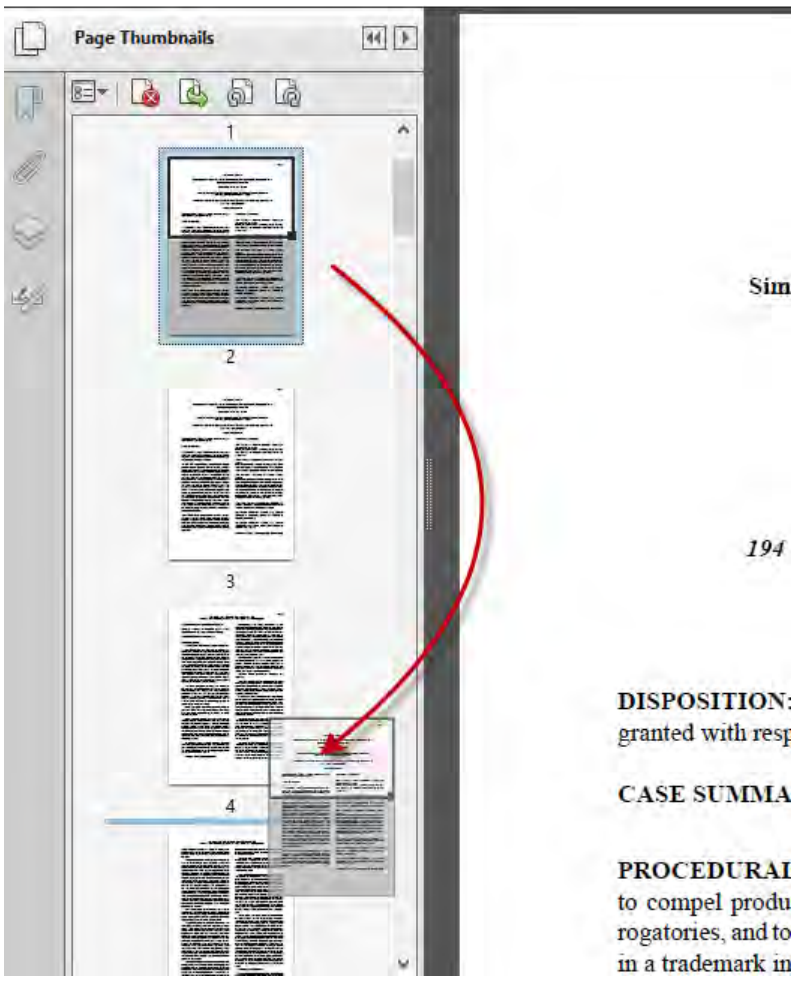
B. **Adding Pages in Thumbnail View**: Open each PDF and turn on the thumbnail view for each PDF. Drag one or more pages from one PDF into the other PDF.



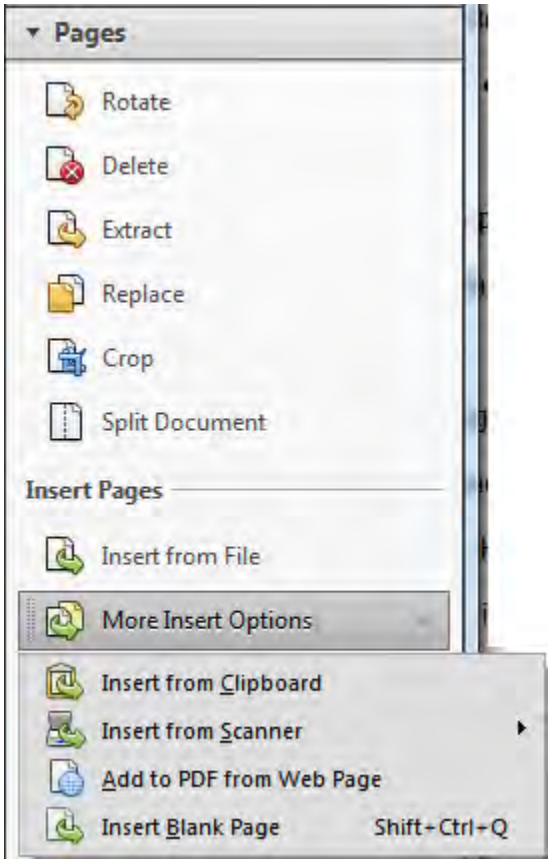
C. **Adding Whole PDFs in Thumbnail View**: Open the destination PDF and turn on the thumbnail view. Drag the entire PDF into the desired location. You can drag from the desktop or any folder/file location.



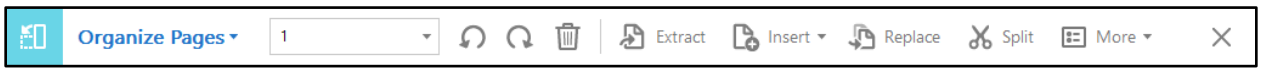
Moving Pages in Thumbnail View: Open the PDF and turn on the Thumbnail View. Drag the desired page(s) from one spot in the Thumbnail View to the desired location.



Manipulations in the Task Pane: In Acrobat X/XI, you find these options under Tools button ➔ Pages. In Acrobat DC, open the Organize Pages tool from the Tools pane. This is what the tools look like in Acrobat X/XI:



This is what the tools look like in Acrobat DC:



XXI. **<u>WATERMARKS</u>**: You can add a watermark to a PDF easily in Acrobat.

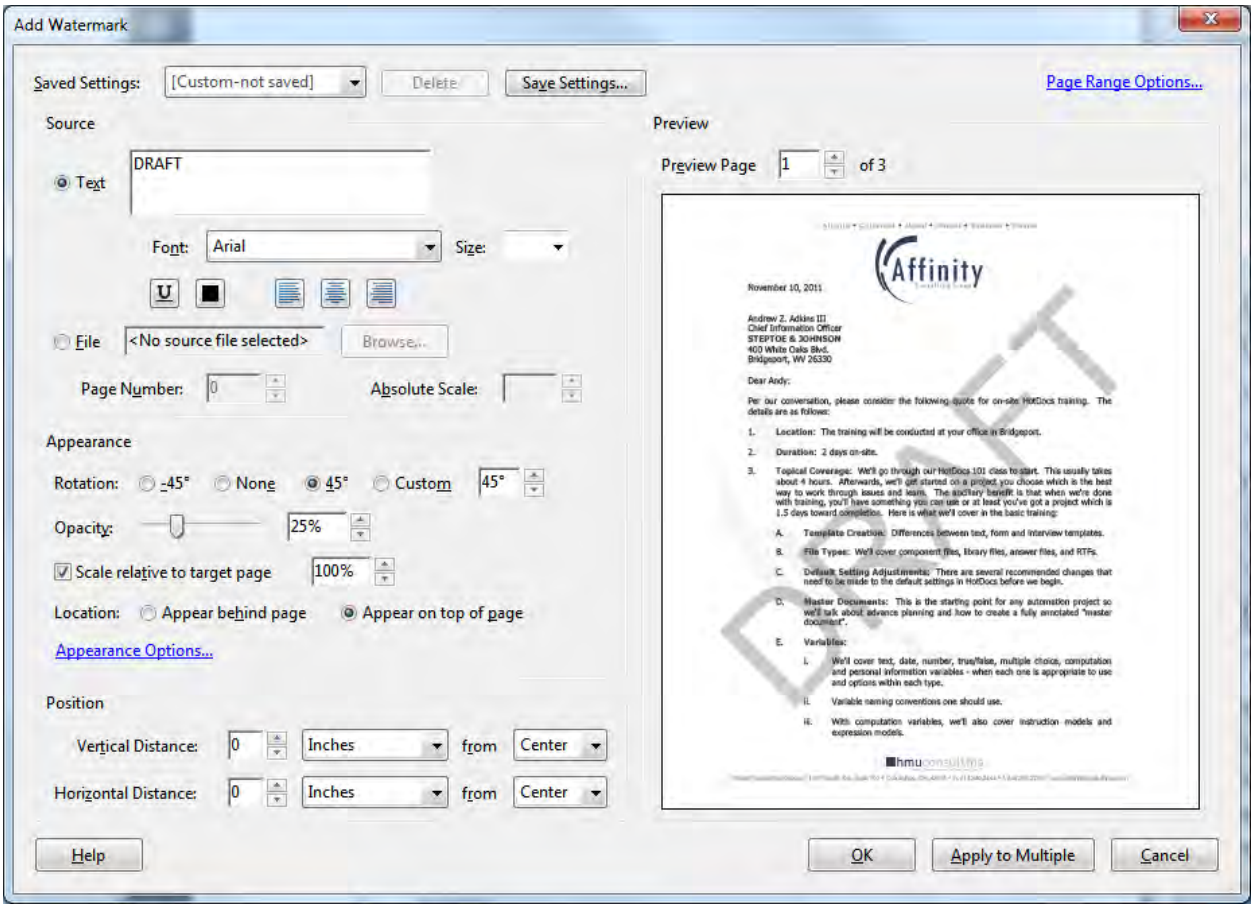
A. **What Is a Watermark?** Traditionally, a watermark was a translucent mark in paper, produced by the pressing of a projecting design, as in the mold, during manufacture.[6] Today, watermarks typically have little to do with the manufacturing process of the paper. Instead, they are usually printed on the paper but are so faint that you can easily read the text of the document over them. Acrobat's watermark feature is an overlay on your document.

B. **Steps for Creating a Watermark in Acrobat**: Just follow these steps to create a watermark on a document:

1. In Acrobat 9, click the Document Menu ➔ Watermark ➔ Add. In Acrobat X/XI, click the Tools button ➔ Pages ➔ Watermark ➔ Add Watermark. In

[6] See http://www.yourdictionary.com/watermark

Acrobat DC, open the Edit PDF tool from the Tools pane ➔ Watermark button ➔ Add.



2. Type the text of the watermark you want (Draft, for example)

3. Recommended settings:

   a. 45° rotation

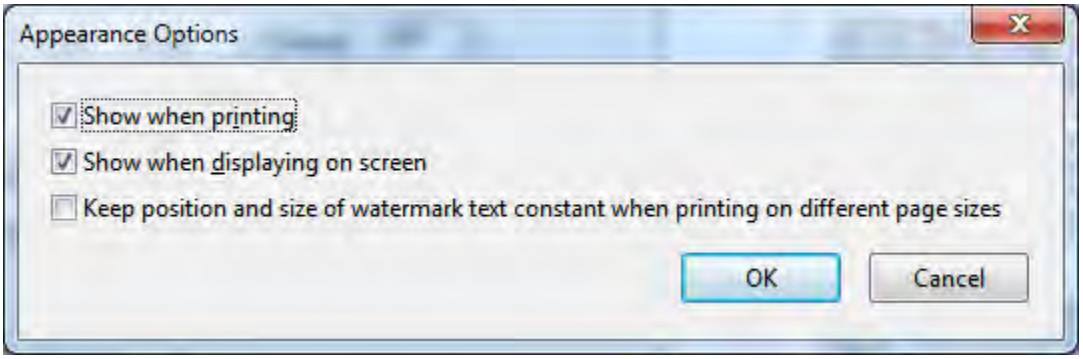
   b. 25% opacity

   c. Scale relative to target page: 100%

   d. Location: Appear on top of page

C. **Saving Your Watermark**: After you have crafted your watermark, click the Save Settings button at the top of the dialog so you don't have to go through all of those settings again the next time you want to use the same dialog.

D. **Appearance Options**: On the Watermark dialog, you'll see a blue hyperlink for Appearance Options. As you can see below, this gives you the option of making the watermark only appear when someone tries to print the document.



E. **Page Range Options**: On the top, right-hand corner of the Watermark dialog, you'll see a Page Range Options link. Clicking it will give you the option of making the watermark apply to all pages, only a certain page range or even or odd pages only.

XXII. **FILLABLE PDF FORMS**: Acrobat has a wonderful tool for creating fillable PDF forms you can distribute to others (this feature is available in Acrobat Standard and Professional versions 9, X, XI & DC).

A. **Examples**:

1. Client Intake Forms
2. Expense Reimbursement Forms
3. Court Forms not already available in PDF format

B. **Drafting the Background Form**: You first need to create the background form by either (1) creating it in a program like Microsoft Word or Publisher and saving it as a PDF, or (2) scanning it and saving it as a PDF.

You will get a much cleaner and crisper quality document if it is re-created electronically in Word or Publisher and then you print/save it as a PDF.

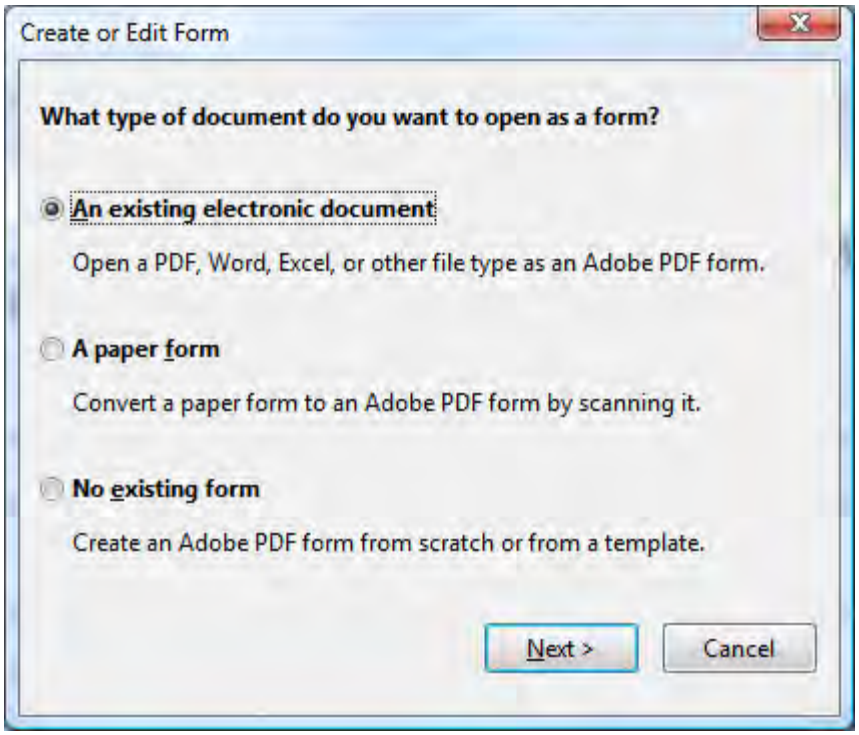
Once you have the underlying document converted to PDF, you will be ready to add the form fields in Adobe Acrobat.

C. Run Form Field Recognition:

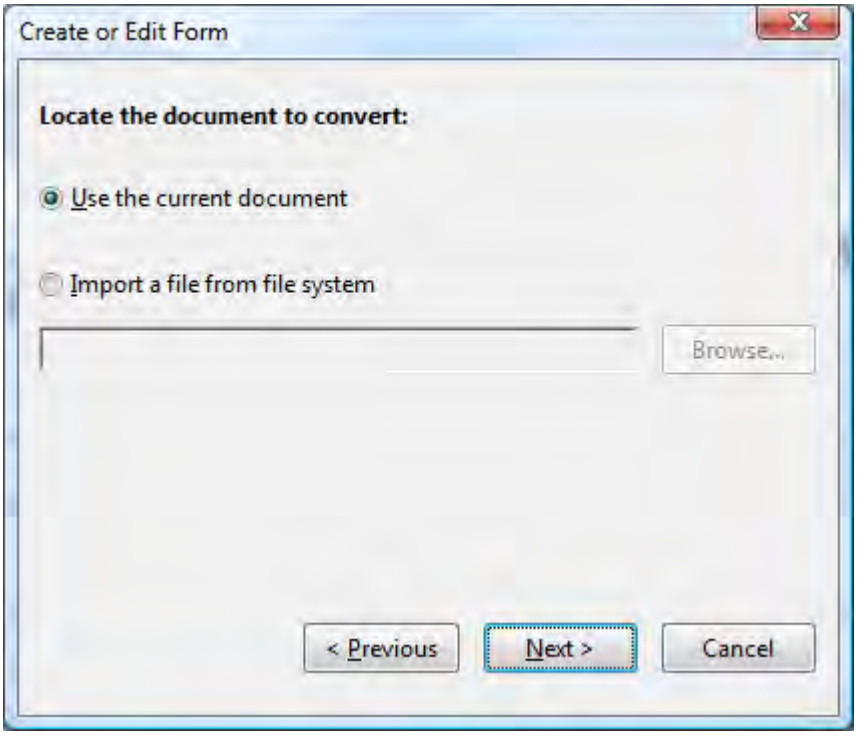
1. **Steps Using Acrobat 9**: First, open the PDF you want to convert into a fillable form.

   a. Once the PDF is open in Acrobat, click the Forms menu → Start Form Wizard.

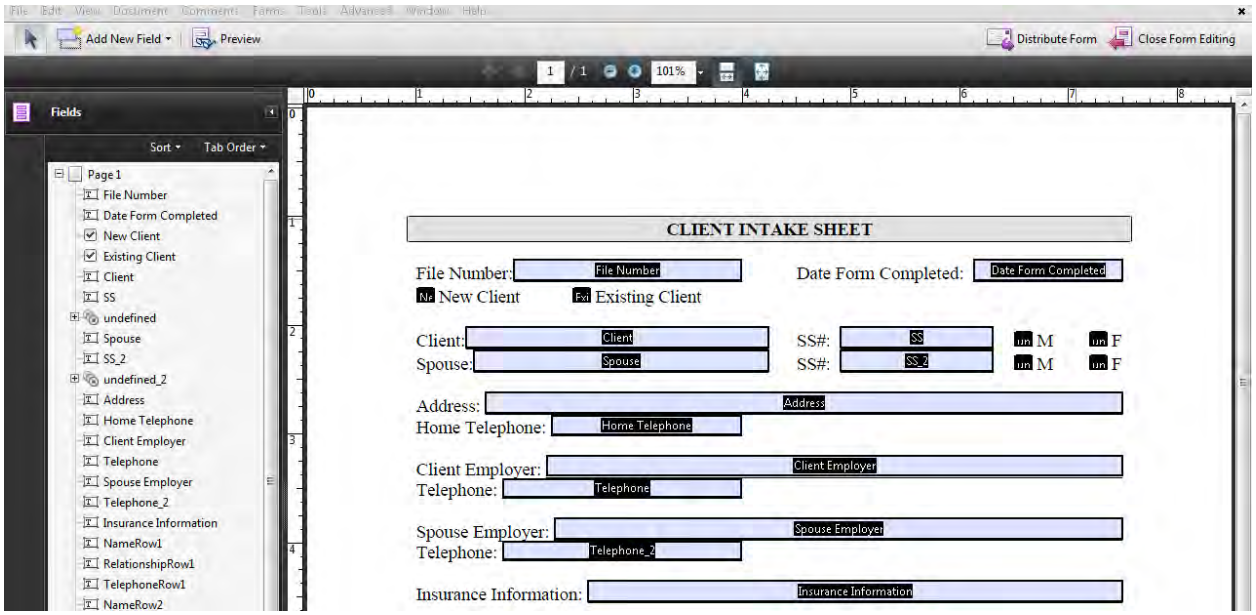
   b. Choose the appropriate starting point from the next dialog → Next.



   c. Use the current document if it's open; otherwise import it.



d. Save the form and voila!



2. **Steps Using Acrobat X/XI**:

a. Click Tools button ➔ Forms ➔ Create.

b. In the next dialog, choose "Use an existing file" or Scan a paper form ➔ Next.

c. If you choose "Use an existing file", the next dialog will ask you whether you want to use the current document or import a file. Choose Use current document ➔ Next.

d. Your form should now be fillable.

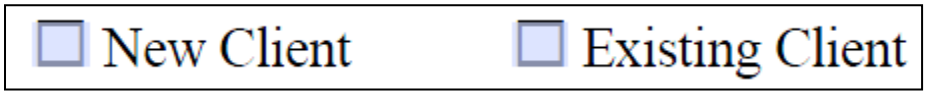
3. This process will find most text fields on your form. If it doesn't you can add fields yourself.

4. Once your form has been "recognized," click the Preview button to see how it looks and test it. To go back to edit mode, just click the Edit Layout button.

D. **Steps Using Acrobat DC**: Open the form you want to make fillable ➔ open the Prepare Form tool from the Tools screen or the Tools pane ➔ Start button. That's it. Once your form has been "recognized," click the Preview button to see how it looks and test it. To go back to edit mode, just click the Edit Layout button.

E. **Clean Up The Form**:

1. **Fixing Check Boxes**: The form wizard will locate check boxes on a form and make them fields. However, they are usually set up as separate fields which means you can check them all at once. That may be fine in some cases, but other times the options are mutually exclusive. For example, if you had a section of your form that looks like the following, you wouldn't want users to have the option of checking *both* boxes:

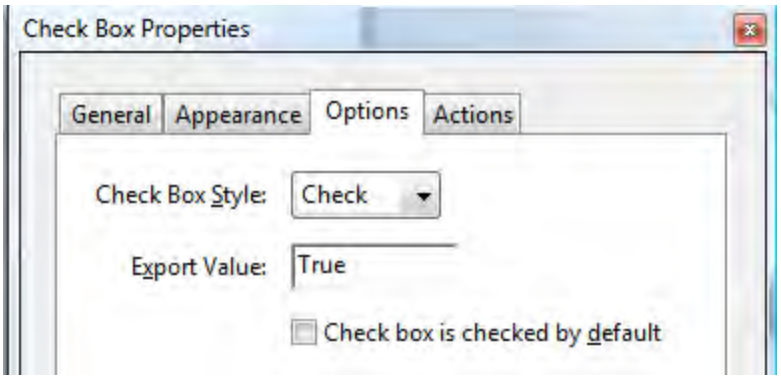


In my form, the foregoing boxes were recognized by the form wizard as separate check boxes so the user would be able to check both of them. To eliminate this as a possibility, just follow these steps:

a. Remove the Existing Client field by clicking on it, then hitting your delete key.

b. First, zoom in so you can better see what you're doing. I like 300% zoom when I'm doing tight editing like this. Double click the New Client field to get to its properties.

c. Click on the Options tab and switch the Check Box Style from square (unless you like that) to Check; and change the Export Value from "on" to "True".



d. Under the Appearance tab, change the Border Color and Fill Color to "no color"

e. Click the Close button at the bottom.

f. Next, I would change the field dimensions so it evenly overlaps the borders of the checkbox. It would go from this:

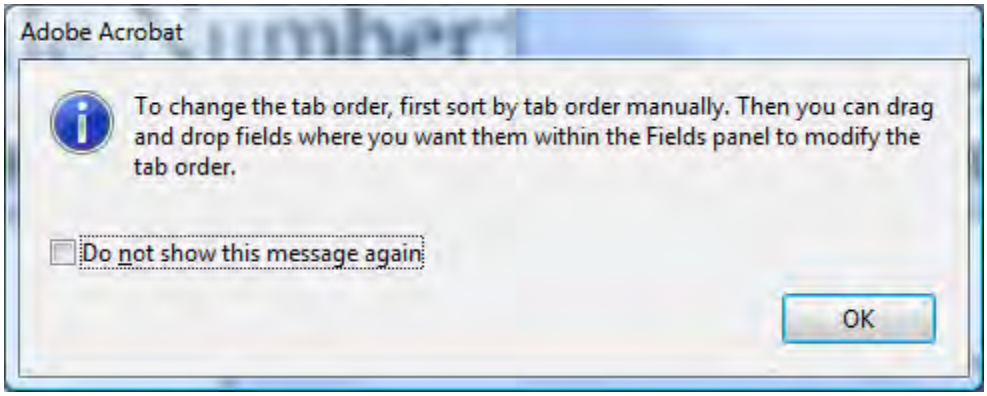
To this:

g. Now click on the field you just modified and hit Ctrl+C (copy) then Ctrl+V (paste). Somewhere on the screen, a duplicate of the New Client field will appear. Drag it over the Existing Client checkbox.

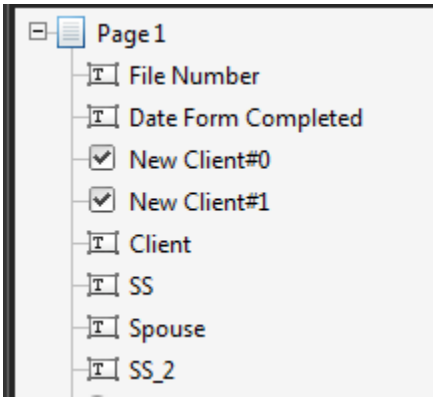
h. Double click the 2nd field to get to the Properties dialog. Click the Options tab and change the Export Value to false.

i. Now Click the Preview button at the top left corner of the screen and test the boxes to make sure they're mutually exclusive.

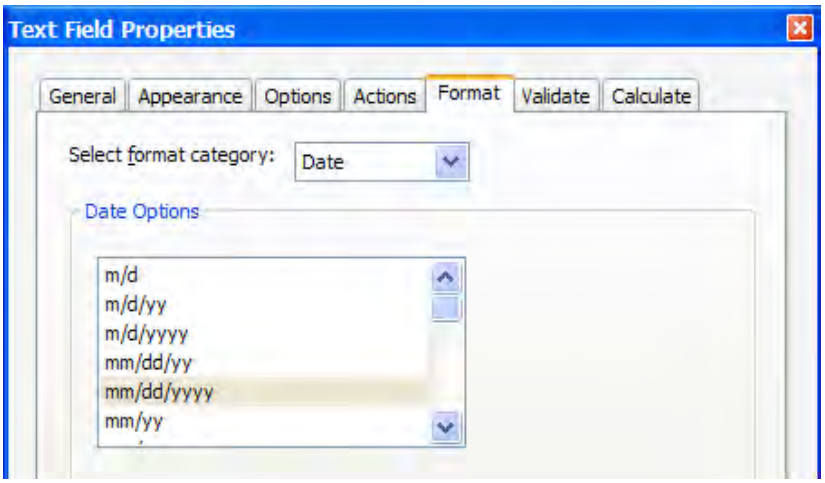
2. **Fix Tab Order**: The Tab Order is the sequence in which your cursor moves from field to field when you hit the tab key on your keyboard. Manually adding fields like we did in the preceding step can mess this up. In order to fix it, first click the Forms menu ➔ Edit Fields ➔ Show Tab Numbers. Next, you'll see this:



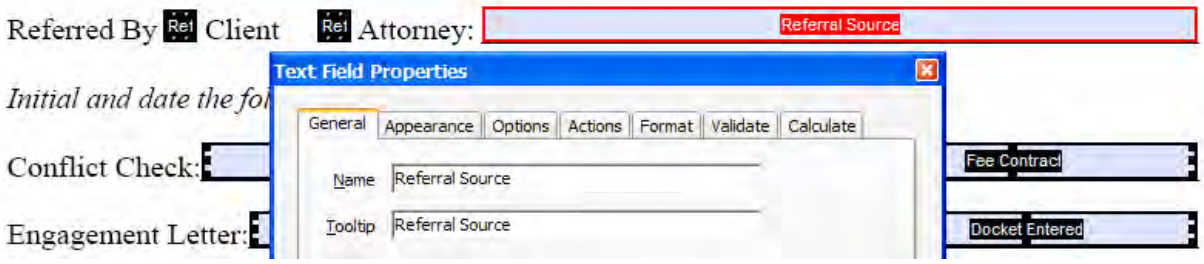
Click OK. On the left side of your screen, the fields appear in the tab order. If you want to change it, just drag a field to another location from top to bottom and you'll see that its tab number will change appropriately.



3. **Format Fields Properly**: Acrobat will not guess exactly how you want things formatted. Scan you form and if you see a field that needs to have specific formatting, double click it, click the Format tab and make the appropriate adjustment.

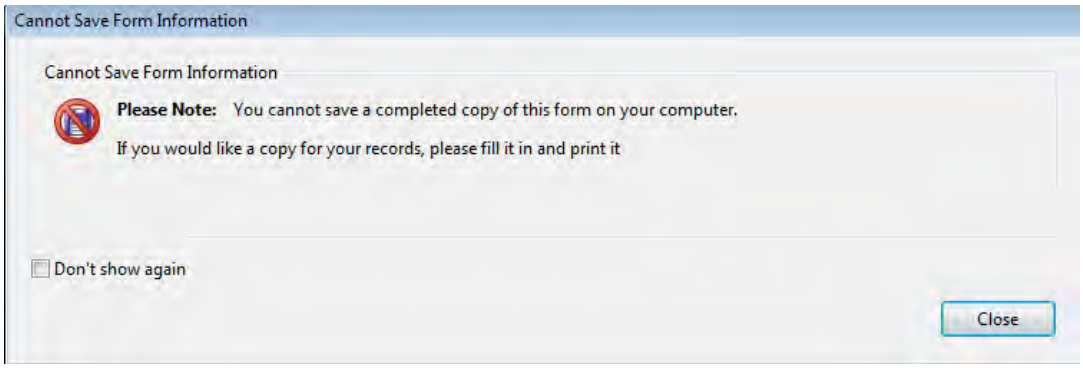


4. **Name Fields Properly**: Acrobat looks at the text of the form to guess what fields should be called and it isn't always right. If you see any fields that do not have useful names, double click them and rename as appropriate.

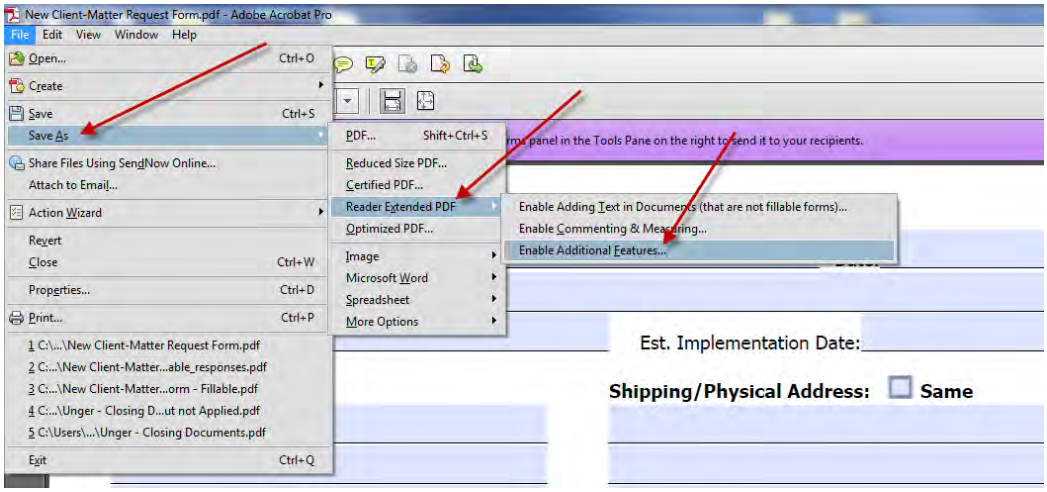


F. **Add SAVE functionality in Acrobat Reader**: IMPORTANT – Unless you "distribute" the form as indicated below (which often times isn't desirable), you must embed

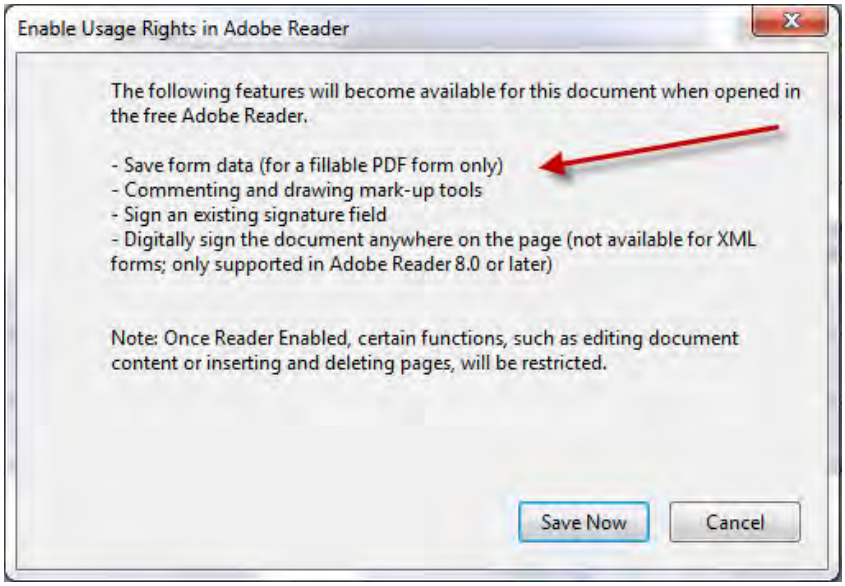
save rights (or "extend" save rights) into the PDF. If you do not, your users trying to fill out the form in Reader (like your clients, etc.) will receive this error:



To "extend" save rights, select **File** > **Save As** > **Reader Extended PDF** > **Enable Additional Features**.

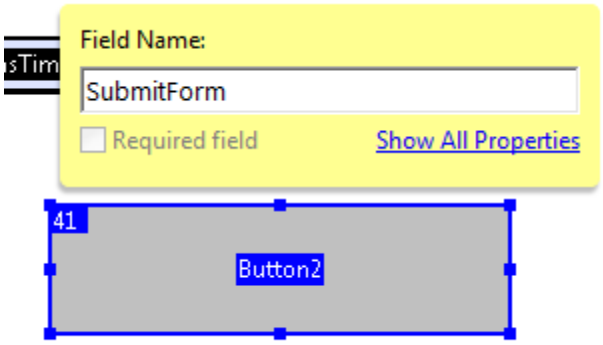


You will receive the following confirmation:

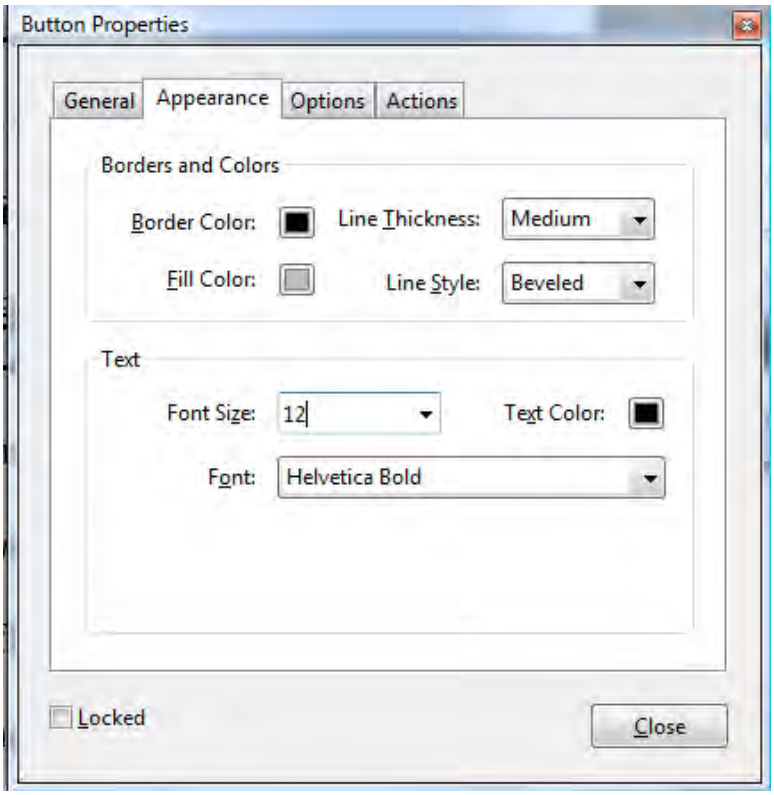


G. **Add A Submit Button To Your Form**: Your form can be distributed to recipients via email and the answers they supply to the form can be emailed back to you (rather than the form itself). Once you receive the answers, the form can be re-assembled and Acrobat will even store the information you receive in a database. To create the submit button, follow these steps:

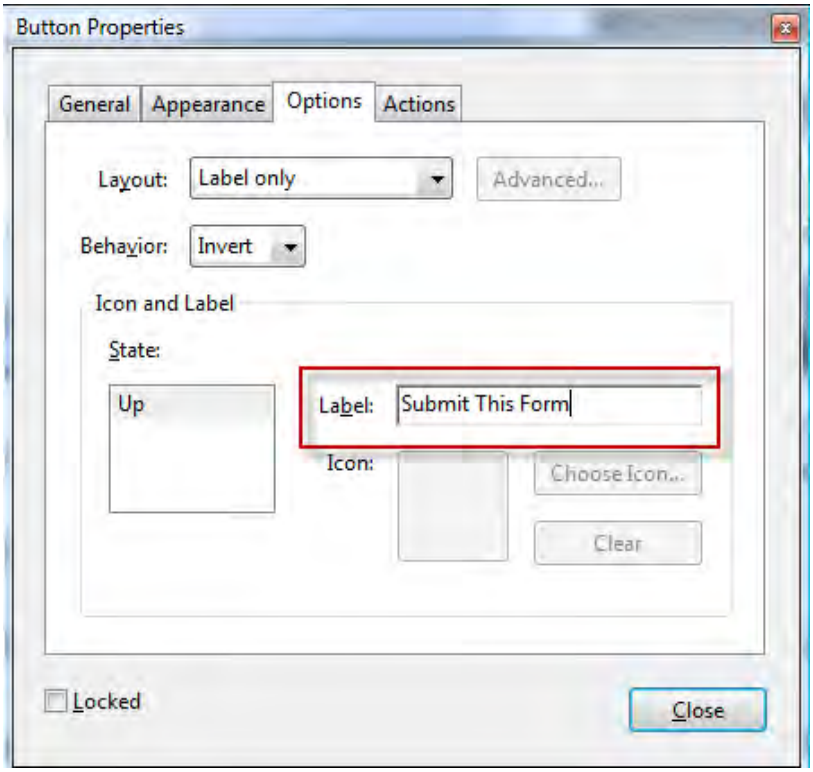
1. In Acrobat 9, click the Add New Field button at the top left corner of the screen and choose Button. In Acrobat X, click Add New Field under Tasks (right side of screen) ➔ Button. Now position the button where you'd like and name it:



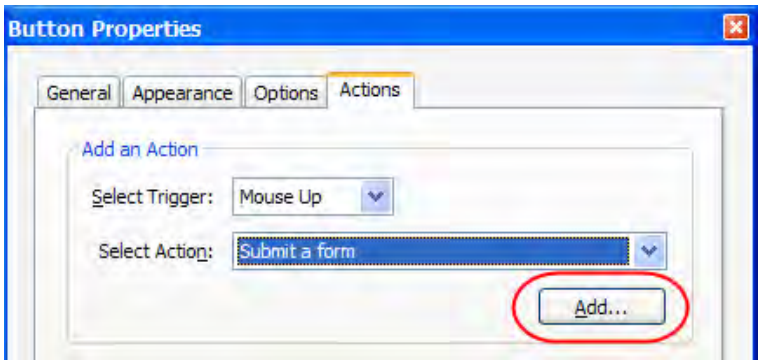
2. Double click the button you've made and the Button Properties dialog will appear. On the Appearance tab, I'd recommend the following settings:



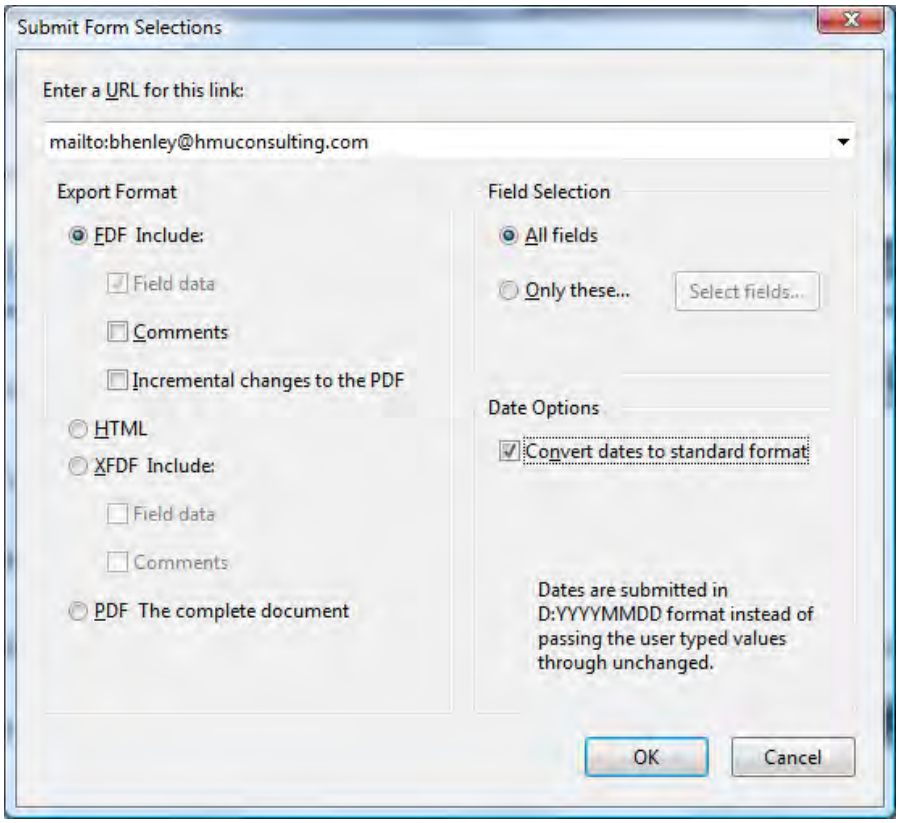
3. On the Options tab, give the button a label.



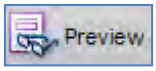
4. On the Actions tab, select the "Mouse Up" trigger, select the "Submit a form" action and click the Add button.



5. When you click Add, you'll see the following dialog. In the top field, type mailto: and then your email address (no spaces). You might want to check the "convert dates to standard format" as well. If you want to make the incoming forms easy to deal with, then choose "PDF the complete document" below rather than "FDF Include" which is the default.



6. Now click the OK button, then the Close button at the bottom of the dialog.

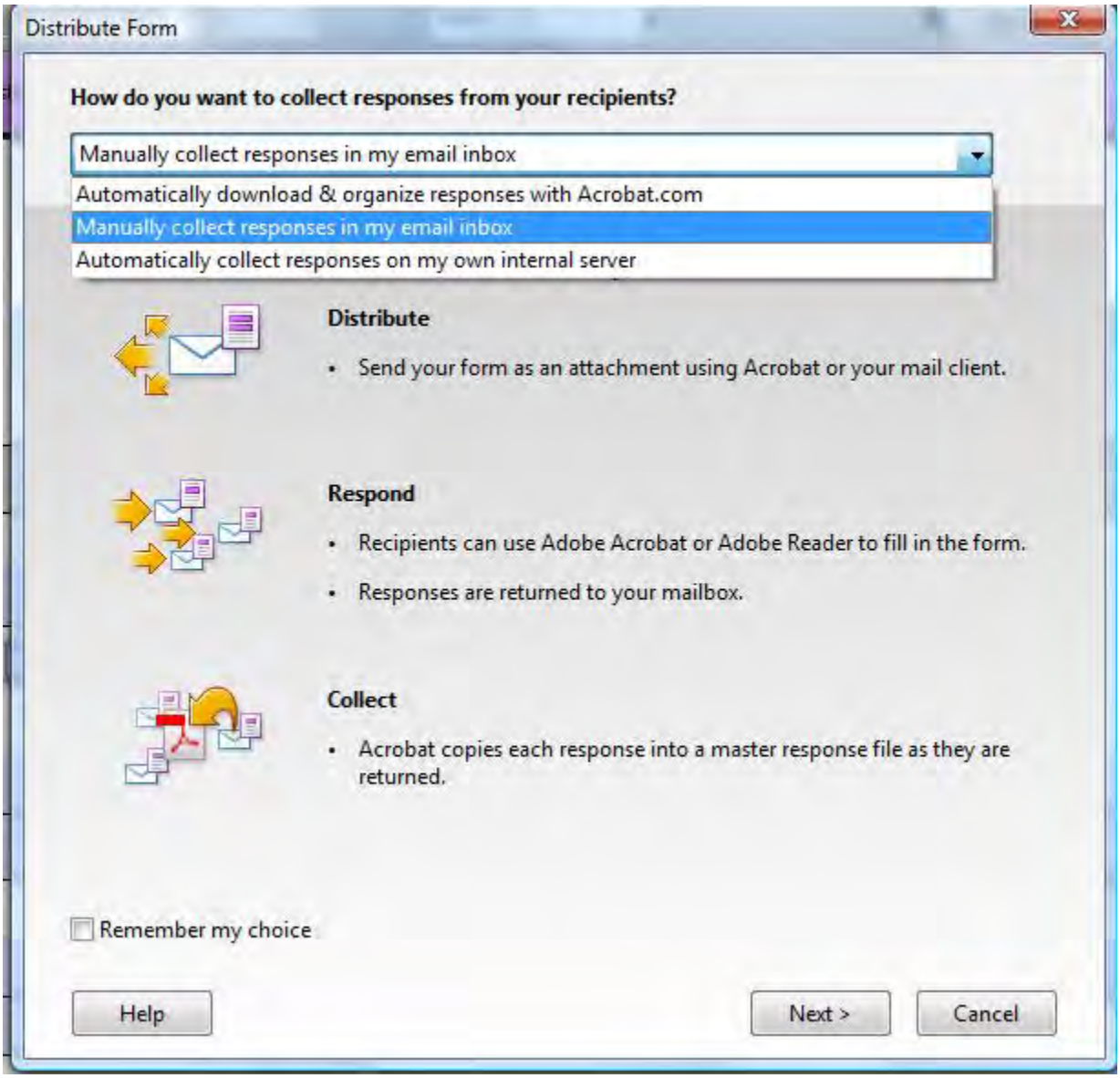
7. Click the 

button on the Forms toolbar to see how your form will look.

H. Distribute Your Form Using Acrobat X/XI: Now your form is ready to be emailed to recipients. Just follow these steps:

1. Open the form in Acrobat.

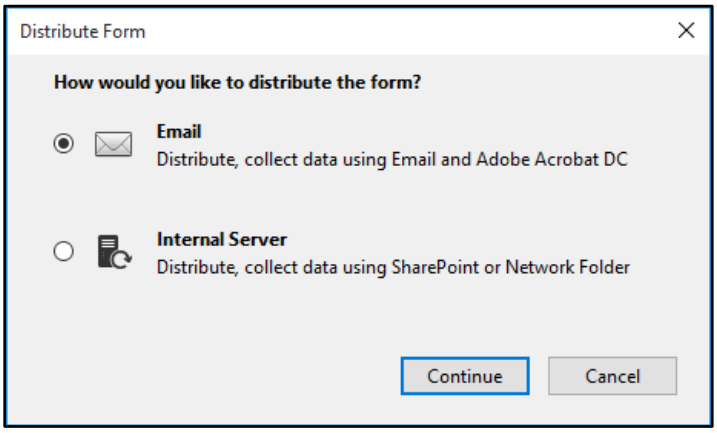
2. In Acrobat X/XI, click the Forms menu ➔ Distribute Form. Now you'll see the following dialog. Under "How do you want to collect…", choose "Manually collect…" and click the Next button.



3. Follow the subsequent on-screen instructions to distribute your form. When the forms come back via email, they'll automatically compile themselves into a database Acrobat sets up for you.

I. Distribute Your Form Using Acrobat DC:

1. In Acrobat DC, click the Distribute button at the bottom of the Prepare Form pane. Next you'll see the following screen. Choose email ➔ Continue button.



2. Next, determine how you want to distribute the form. You can send it using Adobe Acrobat DC or save a local copy and manually send it later.

XXIII. **<u>BATES NUMBERING</u>**: Adobe Acrobat Professional version 8 added excellent Bates numbering functionality for the legal profession. No longer will one need a 3rd party tool to do Bates numbering. Bates numbering is a method of indexing legal documents for easy identification and retrieval. Bates numbers appear as headers or footers on the pages of each PDF in the batch. It can include an alphanumeric prefix and suffix, which can make it easier to recognize the central subject matter of the files.

Adding Bates numbering does not change the file names of the PDFs, rearrange them in desktop folders, link them, or add them to a collection in the Organizer. The only way you can tell that Bates numbering has been added is by opening the PDF and looking at the headers and footers, or by printing the document.

A. **Adding Bates Numbering to PDFs**: Follow these steps:

1. You do not need to open each PDF in order to apply Bates numbering. Place the PDFs in a single folder (for ease), or note each PDF's location on your computer.

2. In Acrobat 8 and 9, click the Advanced menu → Document Processing → Bates Numbering → Add. In Acrobat X/XI, click the Tools button → Pages → Bates Numbering → Add Bates Numbering. In Acrobat DC, click the Stamp tool in the Tools pane → Bates Numbering button.

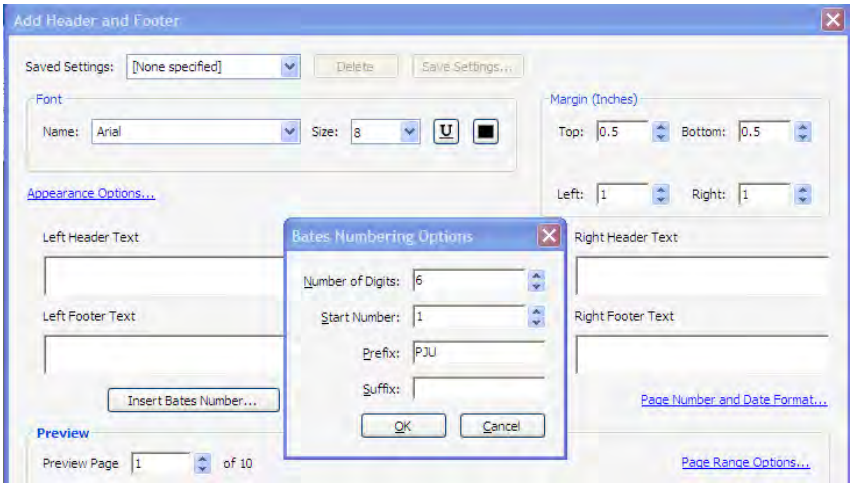
3. Click **Browse** and select all the desired PDFs in Acrobat 8 or 9. In Acrobat X/XI/DC, click the Add Files button in the top, left corner.

4. Adjust the order of the list as needed by simply dragging the PDF to the desired position, or select the PDF and click **Move Up** or **Move Down**.

5. To remove an unwanted PDF, simply select it and click **Remove**.

6. Click **Next** and then the **Add Footer/Add Header** dialog box will appear.

7. Click inside the desired location (Header or Footer) (Left, Center or Right).



8. Click Insert Bates Number.

    a. Number of Digits: (padding) specify the number of digits that make up the Bates number. The minimum is 6 and the maximum is 15.

    b. Start Number: Enter the number that will be assigned to the first page of the first PDF.

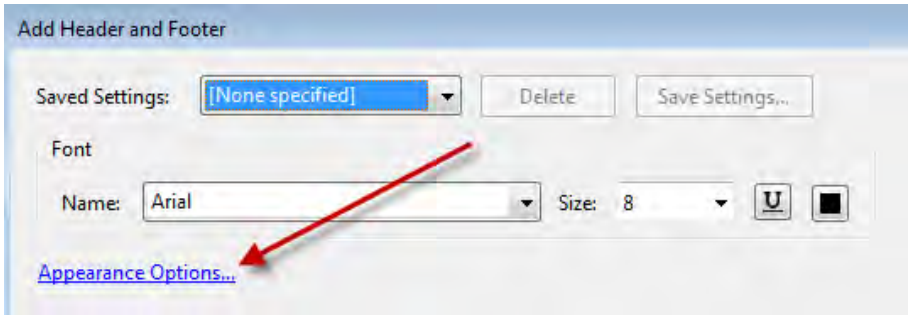
    c. Prefix: Any text to appear before the Bates number.

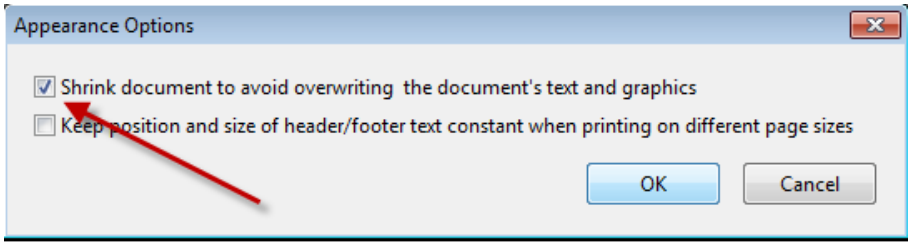
    d. Suffix: Any text to appear after the Bates number.

B. Add More Documents to a Bates Numbered Series:

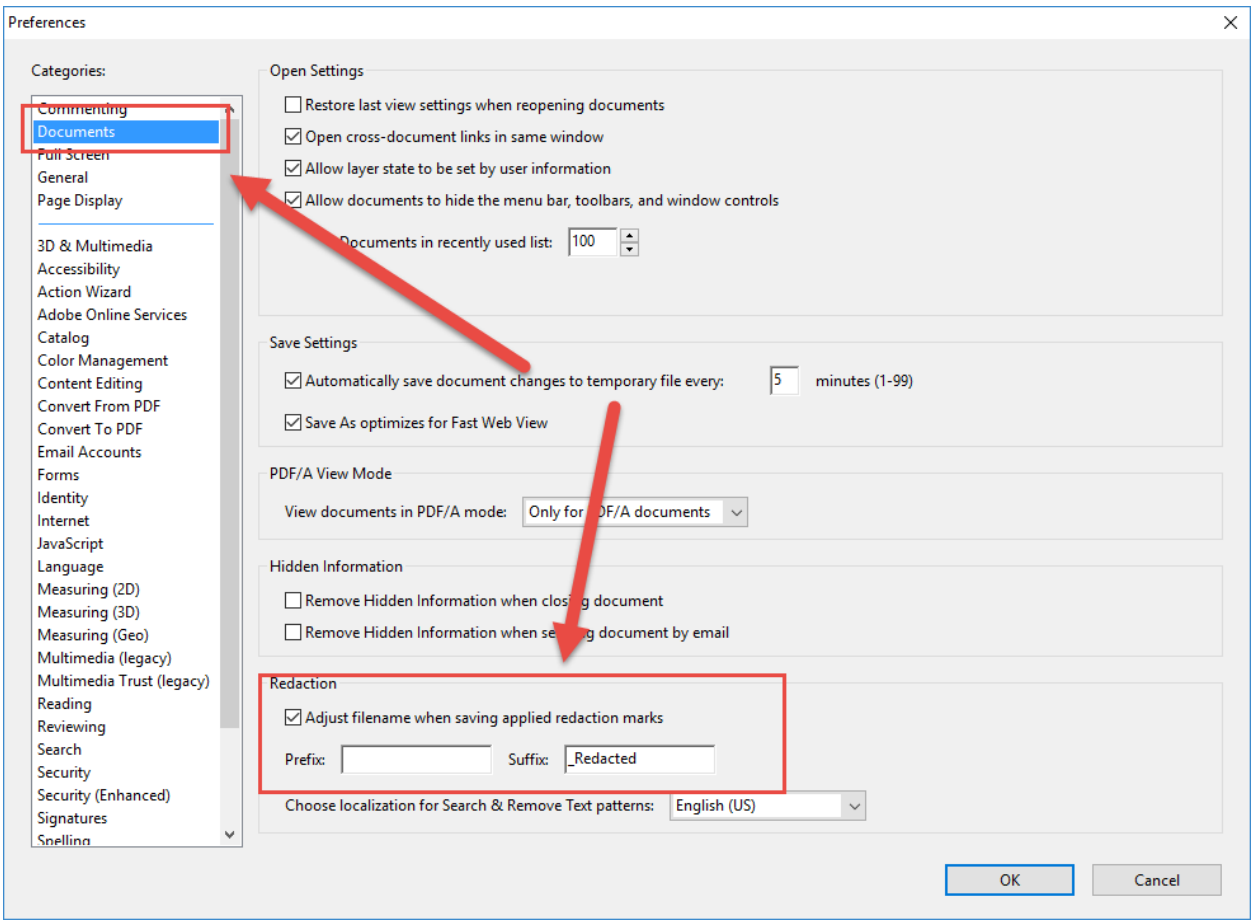
1. On the menu bar, select **Advanced** and then **Document Processing**.
2. Next, select **Bates Numbering** and **Add**.
3. Click **Browse** and select all the desired PDFs to add.
4. Click **Next** and then the **Add Footer/Add Header** dialog box will appear.
5. Click **Insert Bates Number**.
6. Type the suffix and prefix that matches the rest of the series.
7. Type the next number in the series in the **Start Number** field.
8. Click OK.
9. Adjust the order of the list as needed by simply dragging the PDF to the desired position, or select the PDF and click Move Up or Move Down.

C. **Add Avoid Overwriting Graphics with Bates Numbers**: To avoid having the Bates number being stamped on top of existing graphics, select Appearance Options ➔ Shrink document to avoid overwriting document's text and graphics. Click OK.





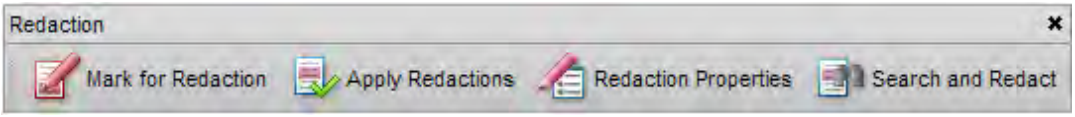
XXIV. **<u>REDACTING TEXT</u>**: Note about saving redacted files **** REDACTIONS ARE PERMANENT!! **** Redactions are permanent once applied. Do not save the redacted version of the PDF over the original. Always make sure to save the redacted version as a separate file. As a further safeguard, check the "Adjust filename when saving applied redaction marks" options in Edit➔Preferences➔Documents:



A. **Redacting In A PDF**: To permanently obscure text in a PDF, follow these steps. However, you should always make a backup copy of the PDF you're working with because redactions are permanent and cannot be reversed once complete. Follow these steps:

1. Open the desired PDF.

2. In Acrobat 8 and 9 Professional, turn in the Redacting Toolbar by selecting from the menu bar Advanced and Redaction. The following toolbar will appear:



In Acrobat X/XI Professional, click the Tools button ➔ Protection.

In Acrobat DC, click the Redact tool from the Tools pane.

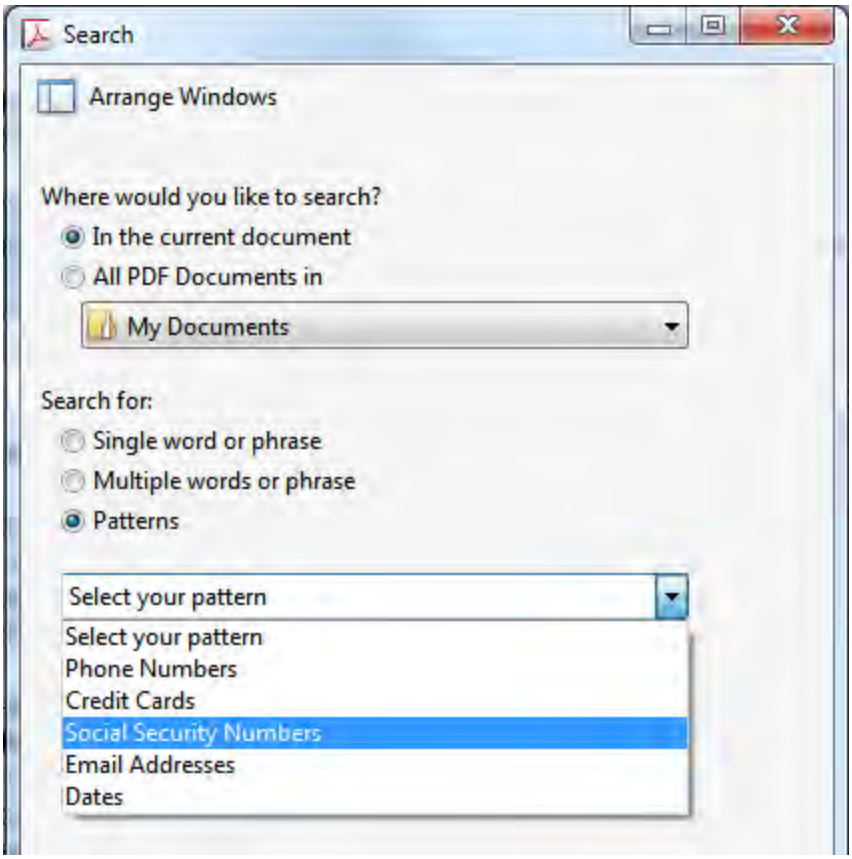
3. To redact text in a text-searchable PDF, simply click on the **Mark for Redaction** button, select the desired text, as represented by the smaller red rectangle below, and then click **Apply Redactions**.

4. To redact a region or area (images or non text-searchable PDF), simply click and drag over an area, as represented in the larger red rectangle below, and then click **Apply Redactions**.

5. When you save the document, you will be asked to save the document with a different name.

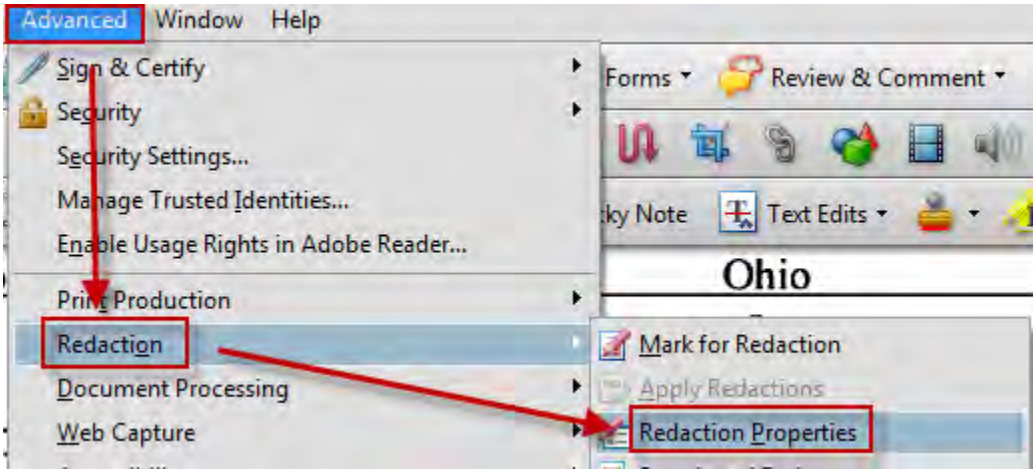
6. The default redaction color is black. To change this, click on the **Redaction Properties** toolbar button.

7. To **Search and Redact**, click on the Search and Redact button in Acrobat 9. In Acrobat X/XI, click Search & Remove Text. In Acrobat DC, click the Mark for Redaction button ➔ Find Text. Perform a search for the desired text, phrase or pattern. Select the results you would like to mark by checking the boxes to the left of the result list. Then select Mark for Redaction.



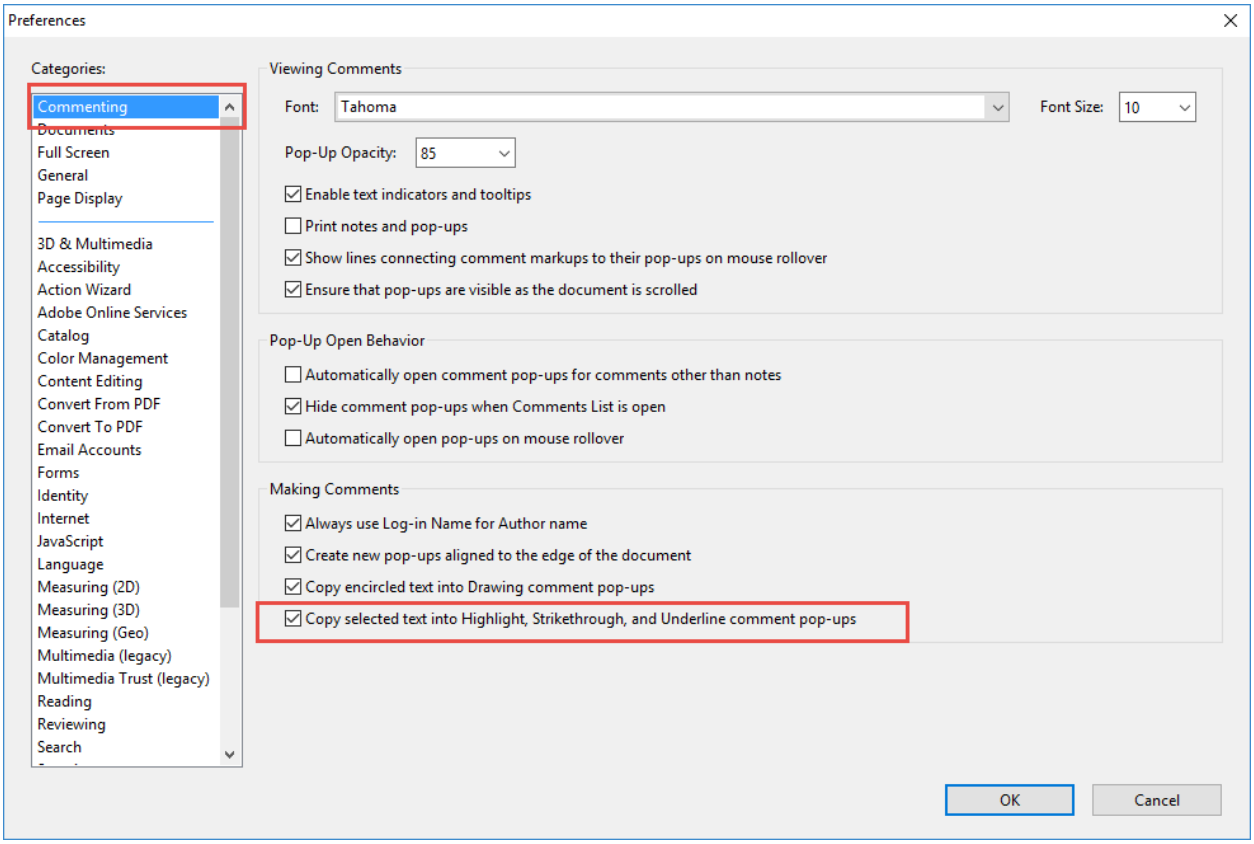
B. **Only Available in Acrobat Professional Version 8, 9, X, XI & DC**: This particular feature is not available in Adobe Acrobat Standard – only Professional and not in any prior versions.

C. **Acrobat's Eraser**: In Acrobat 8 or 9, if you click the Advanced menu ➔ Redaction ➔ Redaction Properties (see below), you can change the Redacted Area Fill Color to No Color. Assuming the background of your PDF is white, this will effectively erase whatever you redact (in other words, it won't black it out).



You can get to the same menu in Acrobat X/XI by clicking the Tools button ➔ Protection ➔ Redaction Properties. In Acrobat DC, click the Redact tool ➔ Properties button.

D. **Using Comments with Redaction**. Every redaction generates a comment. However, the comment does not include the redacted text by default. To change this setting, go to Edit➔Preferences➔Comments and check "Copy selected text into Highlight, Strikethrough, and Underline comment pop-ups.



You can then create a summary of all the redacted text by creating a comment summary.

To create a privilege log across multiple documents, download the free Action "Create Comment Summary" for Acrobat X/XI from:

https://acrobatusers.com/assets/uploads/actions/Create_Comment_Summary.sequ

This action will create a spreadsheet of all comments from multiple documents. Note: The generated spreadsheet will not include the redaction codes.

Exhibit A
Adobe Acrobat DC Features Matrix

Acrobat DC product comparison

See what Acrobat DC with Adobe Document Cloud services can do for you.

	Acrobat Standard DC		Acrobat Pro DC	
	Perpetual	Subscription	Perpetual	Subscription
Interact with PDFs				
View, interact, and comment on PDF content from your computer or mobile device	●	●	●	●
NEW Work on touch-enabled devices	●	●	●	●
NEW Store and share files online with instant access to recently viewed files	●	●	●	●
NEW Send, track, and confirm delivery of important documents electronically		●		●
Create PDFs				
Create PDFs from any application that prints	●	●	●	●
Create, protect, and send PDFs in popular Office apps for Windows	●	●	●	●
Combine multiple documents in one PDF file	●	●	●	●
Convert web pages to interactive PDFs, complete with links	●	●	●	●
Prevent others from copying or editing sensitive information in PDFs	●	●	●	●
Turn scanned documents into searchable PDFs with selectable text	●	●	●	●
NEW Recognize text in scans, and then preview and fix suspected errors with a side-by-side view	●	●	●	●
NEW Automatically fix document photos to remove backgrounds and adjust perspective	●	●	●	●
Create and export PDFs on your mobile device		●		●
NEW Create high-quality PDFs in Microsoft Word for Mac			●	●
Prepare PDFs consistently with guided Actions			●	●
Convert or validate PDFs for compliance with ISO standards like PDF/A or PDF/X			●	●
Create and validate PDFs to meet accessibility standards for people with disabilities			●	●
Edit PDFs				
NEW Edit text and images in a PDF with full-page paragraph reflow	●	●	●	●
NEW Turn PDFs into editable Microsoft Word, Excel, or PowerPoint files with improved formatting accuracy	●	●	●	●
Convert PDFs to JPEG, TIFF, or PNG image formats	●	●	●	●
Insert, delete, and organize pages in a PDF	●	●	●	●
Add bookmarks, headers, numbering, or watermarks	●	●	●	●
NEW Edit text and organize pages in a PDF on your iPad				●
NEW Turn scanned paper documents into instantly editable PDFs			●	●
Automatically optimize PDFs to reduce file size, or customize settings first			●	●
Add audio, video, and interactive objects to your PDFs			●	●
Redact to permanently remove sensitive information in PDFs			●	●
Preflight and prepare files for high-end print production			●	●
Add Bates numbering to legal documents			●	●
Sign and collect				
NEW Fill, sign, and send forms fast from your computer or mobile device with smart autofill	●	●	●	●
NEW Collect e-signatures from others and track responses in real time		●		●
Turn paper or Word docs into fillable PDF forms	●	●	●	●
Add comments to PDFs with a highlighter, sticky notes, and more	●	●	●	●
Collect comments from others in one PDF file	●	●	●	●
Mark PDFs with stamps, such as "approved" or "draft"	●	●	●	●
Work with certificate signatures	●	●	●	●
Compare two versions of a document to see what's changed			●	●
Deploy and manage across the organization				
Safeguard systems and data with application security and sandboxing technology	●	●	●	●
Customize features and settings with the Customization Wizard and Enterprise Toolkit	●	●	●	●
Deploy and update with Microsoft SCCM/SCUP and Apple Remote Desktop	●	●	●	●
Use virtualization tools, including Microsoft App-V* and UE-V, or Citrix XenApp	●	●	●	●

Exhibit B
Adobe Acrobat Version Comparison

Acrobat Pro DC version comparison

See how Acrobat Pro DC software compares to previous versions.

	Acrobat X	Acrobat XI	Acrobat DC
Interact with PDFs			
NEW Send, track, and confirm the delivery of important documents electronically			S
NEW Maintain a consistent user experience across all your devices			S
NEW Browse the Tool Center or use the search box to find tools quickly			●
NEW Instantly find the right tools through a task-based onscreen experience			●
NEW Work with touch-enabled devices			●
NEW Get instant access to recently viewed files with Mobile Link			●
NEW Select the Save ink/toner option to reduce costs when printing from Windows			●
Create PDFs			
Create PDFs on the go in a browser or on a mobile device		S	S
Merge multiple documents into one PDF in a browser		S	S
Drag and drop to preview and arrange documents and pages before combining them in one PDF		●	●
Create, protect, and send PDFs directly from popular Office apps for Windows	o	●	●
NEW Create high-quality PDFs in Microsoft Word for Mac			●
Edit PDFs			
Export PDFs to Office formats in a browser or on a mobile device		S	S
NEW Turn scanned paper documents into instantly editable PDFs with fonts that match the original text			●
NEW Add or edit text—or rearrange pages—in a PDF on your iPad			S
Edit PDF files intuitively, clicking and dragging to reflow paragraphs		●	●
NEW Reflow text across a page without having to adjust individual paragraphs			●
NEW Add new lines to existing bulleted or numbered lists without reformatting			●
NEW Run spell check on your entire document and correct typos			●
Find and replace text in a single step		●	●
Convert some or all of a PDF to an editable Word, Excel, PowerPoint, or RTF file	o	●	●
NEW Turn PDFs into editable Word, Excel, or PowerPoint files with improved formatting accuracy			●
NEW Preview and correct suspected text recognition errors with a side-by-side view	o	o	●
NEW Clean up document photos to remove backgrounds and adjust perspective			●
Sign and collect			
NEW Fill, sign, and send forms from your computer or mobile device			●
NEW Fill forms faster with reusable text from your personal autofill collection			●
NEW Collect e-signatures from others and track responses in real time		S	S
Accessibility			
Create and validate PDFs based on WCAG 2.0 and PDF/UA accessibility standards		●	●
NEW Read PDFs aloud with VoiceOver support on Mac OS X computers			●
NEW Read text more easily in high contrast mode on your PC with dynamic background adjustment			●

S—Subscription only
o—Contains a portion of the capability

Cyber Security - Digital Security Measures Every Lawyer Must Take

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Cyber Security - Digital Security Measures Every Lawyer Must Take
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Digital Security Measures Every Lawyer Must Take

I. **INTRODUCTION**: In 2013, the American Bar Association promulgated amendments to the Model Rules of Professional Conduct which dealt with technology and data security. 36 states have adopted those changes (for a full list, see http://bit.ly/2HJEoFH). Rule 1.6 requires a lawyer to make "reasonable efforts" to prevent the disclosure of confidential client information. Comment 18 further stipulates that "reasonable precautions" must be taken to prevent client information from falling into the wrong hands. In a digital world, the exact meaning of "reasonable efforts" and "reasonable precautions" may be subject to debate. However, it's hard to argue that doing nothing to protect client data would meet the standard. You don't have to be a security expert or techie to protect yourself and your office. Learn how to cover all the bases of computer, smartphone, tablet, email, wireless and document encryption. We'll also cover the fundamentals of backing up your electronic data. Half of the battle is simply knowing what questions to ask and it's not nearly as complicated as it sounds. Establish best practices in your office and discover the inexpensive or free tools that will make sure your confidential information remains confidential.

II. **DEFINITIONS**: It's important to define what we're talking about here.

A. **Business Disaster**: Generally, any event that makes the continuation of normal functions impossible is considered a disaster. The severity of the disaster is a function of how long it remains impossible for the business to function normally and the severity of the impairment.

B. **Disaster Avoidance**: I really like this discussion and definition of disaster avoidance:

> "When I discuss 'Disaster Recovery Planning' I prefer the phrase 'Disaster Avoidance & Recovery Planning' (DARP). I use DARP because I believe that a disaster is a problem affecting your application availability that is unmitigated. In other words, the problem occurs and you have no repeatable strategy in place to return your operations to normal in a set period of time. Disaster 'Avoidance' in my definition refers to the ability to avoid an outage or provide a controlled and well understood ability to recover systems to normal operations."[1]

Here's the scary thing about business disasters which really underscores the need for planning:

[1] Disaster Avoidance and Recovery Planning in a Cloudified World, by Mark Thiele, Jan 5, 2011, see http://tinyurl.com/m396848

> "According to the Institute for Business and Home Safety, an estimated **25 percent** of businesses do not reopen following a major disaster. You can protect your business by identifying the risks associated with natural and man-made disasters, and by creating a plan for action should a disaster strike. By keeping those plans updated, you can help ensure the survival of your business."[2]

III. **CAUSES OF BUSINESS DISASTERS**: Here's a list of things we need to protect against.

A. **Data Loss or Data Disclosure**: The loss of data or access to data can stop a firm in its tracks. Further, the disclosure of confidential client data can result in malpractice actions and may also shut down a firm. There are many reasons why data loss or disclosure occurs:

1. **Human error**.
2. **Hardware failure** - flaw or defect.
3. **Fire or natural disaster**.
4. **Temperature**.
5. **Virus - ransomware - malware**.
6. **Synchronization issues**.
7. **Criminal Acts of Others**. Law firms are often the target of hackers.

> "Hackers broke into the computer networks at some of the country's most prestigious law firms, and federal investigators are exploring whether they stole confidential information for the purpose of insider trading, according to people familiar with the matter. The firms include Cravath Swaine & Moore LLP and Weil Gotshal & Manges LLP, which represent Wall Street banks and Fortune 500 companies in everything from lawsuits to multibillion-dollar merger negotiations. Other law firms also were breached, the people said, and hackers, in postings on the Internet, are threatening to attack more."[3]

[2] Disaster Planning, by The U.S. Small Business Administration, see http://www.sba.gov/content/disaster-planning
[3] Hackers Breach Law Firms, Including Cravath and Weil Gotshal, by Nicole Hong and Robin Sidel on March 29, 2016, The Wall Street Journal, see http://tinyurl.com/jbzow32.

8. **Malicious acts of employees**. The biggest example of this is probably the Panama Papers.

> "An attorney spokesman for the law firm of Mossack and Fonseca, the source of the Panama Papers documents, has stated that eight former employees are under investigation by government prosecutors, in an effort to identify who stole more than 11 million documents, which name tax cheats and corrupt officials, from its corporate files. The names of the former employees have not been made public."[4]

B. **Natural Disasters**: This would include tornados, hurricanes, floods, earthquakes, mudslides or anything of that nature. These events often result in constructive eviction from your office space and often, data loss.

C. **Fire**: This may or may not be a "natural" disaster, but the effects are devastating. The water used to put out the fire often causes more damage than the fire itself. Of course, this frequently results in data loss and certainly eviction from your office.

D. **Power Failure**: Of course, lots of things could cause this. The situation most damaging is when power is lost for more than a day. Of course, you can't get work done at the office and probably can't access data on the computers there. So what do you do? As our weather patterns appear to grow more severe for whatever reason, power failure is becoming a bigger issue.

E. **Internet Failure**: Lawyers need Internet access for email, to conduct research, for access to programs and data (if they have hosted servers) and for phone service (if they have a VoIP phone system). Losing that access for any extended period of time could easily constitute a disaster and partially or completely shut down a law firm's ability to work normally.

F. **Death, Disability or Departure of Principal or Key Employee**: The death or disability of a principal can be devastating, particularly if there was no business succession plan in place. A firm can also grind to a halt if a key administrative person leaves or dies and none of what that person did was written down and no one remaining knows how to handle those tasks. Finally, if a key lawyer leaves and takes all of the knowledge regarding a particular practice area (and clients) with them, it can create a serious problem. This is far more common than you may think.

[4] Panama Papers Law Firm Targets Eight Former Employees But Still Alleges System Hack, by Kenneth Rijock, May 14, 2016, Caribbean News Now!, see http://tinyurl.com/z9t8ndv.

G. **Theft**: We have seen cases in which thieves break into a law office and take the computers, the server and even the backups.

IV. **YOUR ETHICAL DUTIES**: I've only reproduced the sections of the rules and comments below which are relevant to this discussion. Further, I've bolded the particularly important text.

A. **RULE 1.1 - Competence**:

A lawyer shall provide competent representation to a client. Competent representation requires the legal knowledge, skill, thoroughness and preparation reasonably necessary for the representation.

B. **RULE 1.1 - Maintaining Competence Comment 6**: To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, ***including a reasonable understanding of the benefits and risks associated with technology the lawyer uses to provide services to clients or to store or transmit information related to the representation of a client***, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject. (emphasis added)

C. **RULE 1.6 - Confidentiality of Information**:

(a) ***A lawyer shall not reveal information relating to the representation of a client unless the client gives informed consent***, the disclosure is impliedly authorized in order to carry out the representation or the disclosure is permitted by paragraph (b). (emphasis added)

…

(c) ***A lawyer shall make reasonable efforts to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to, information relating to the representation of a client.*** (emphasis added)

D. **RULE 1.6 - Acting Competently to Preserve Confidentiality Comment 20**: ***Paragraph (c) requires a lawyer to act competently to safeguard information relating to the representation of a client against unauthorized access by third parties*** and against inadvertent or unauthorized disclosure by the lawyer or other persons who are participating in the representation of the client or who are subject to the lawyer's supervision. See Rules 1.1, 5.1 and 5.3. ***The unauthorized access to, or the inadvertent or unauthorized disclosure of, information relating to the representation of a client does not constitute a violation of paragraph (c) if the lawyer has made reasonable efforts to prevent the access or disclosure. Factors to be considered*** in determining the reasonableness of the lawyer's efforts include, but are not limited to, ***the sensitivity of the information***, the ***likelihood***

of disclosure if additional safeguards are not employed, the ***cost*** of employing additional safeguards, the ***difficulty*** of implementing the safeguards, and the extent to which the safeguards adversely affect the lawyer's ability to represent clients (e.g., by making a device or important piece of software excessively difficult to use). ***A client may require the lawyer to implement special security measures not required by this Rule or may give informed consent to forgo security measures that would otherwise be required by this Rule.*** Whether a lawyer may be required to take additional steps to safeguard a client's information in order to comply with other law, such as state and federal laws that govern data privacy or that impose notification requirements upon the loss of, or unauthorized access to, electronic information, is beyond the scope of these Rules.

E. **RULE 1.6 - Acting Competently to Preserve Confidentiality Comment 21**: ***When transmitting a communication*** that includes information relating to the representation of a client, the ***lawyer must take reasonable precautions to prevent the information from coming into the hands of unintended recipients***. This duty, however, ***does not require that the lawyer use special security measures if the method of communication affords a reasonable expectation of privacy***. ***Special circumstances***, however, ***may warrant special precautions***. ***Factors to be considered*** in determining the reasonableness of the lawyer's expectation of confidentiality include the ***sensitivity of the information*** and the ***extent to which the privacy of the communication is protected by law or by a confidentiality agreement***. ***A client may require the lawyer to implement special security measures not required by this Rule or may give informed consent to the use of a means of communication that would otherwise be prohibited by this Rule***. Whether a lawyer may be required to take additional steps in order to comply with other law, such as state and federal laws that govern data privacy, is beyond the scope of these Rules.

F. **RULE 5.1 - Responsibilities of Partners, Managers and Supervisory Lawyers**:

(a) A partner in a law firm, and a lawyer who individually or together with other lawyers has comparable managerial authority in a law firm, **shall make reasonable efforts to ensure that the firm has in effect measures giving reasonable assurance that all lawyers in the firm conform to the Rules of Professional Conduct**.

(b) **A lawyer having direct supervisory authority over another lawyer, including a suspended lawyer employed pursuant to Rule 34, RLDE, Rule 413, SCACR, shall make reasonable efforts to ensure that the other lawyer conforms to the Rules of Professional Conduct.**

(c) **A lawyer shall be responsible for another lawyer's violation of the Rules of Professional Conduct if**:

(1) **the lawyer orders or, with knowledge of the specific conduct, ratifies the conduct involved**; or

(2) **the lawyer is a partner or has managerial authority in the law firm in which the other lawyer practices, or has direct supervisory authority over the other lawyer, and knows of the conduct at a time when its consequences can be avoided or mitigated but fails to take reasonable remedial action**.

(d) Partners and lawyers with comparable managerial authority who ***reasonably believe that a lawyer in the law firm may be suffering from a significant impairment of that lawyer's cognitive function shall take action to address the concern with the lawyer*** and may seek assistance by reporting the circumstances of concern pursuant to Rule 428, SCACR.

G. RULE 5.3 - Responsibilities Regarding Nonlawyer Assistants: This rule makes Rule 1.6 apply to everyone that works for the lawyer (not just the lawyers). It further makes the lawyer(s) responsible for the conduct (and mistakes) of nonlawyer assistants.

With respect to a nonlawyer employed by or retained by **or associated** with a lawyer:

(a) a partner in a law firm, and a lawyer who individually or together with other lawyers has comparable managerial authority in a law firm, **shall make reasonable efforts to ensure that the firm has in effect measures giving reasonable assurance that the person's conduct is compatible with the professional obligations of the lawyer**;

(b) **a lawyer having direct supervisory authority over the nonlawyer, including a suspended lawyer employed pursuant to Rule 34, RLDE, Rule 413, SCACR, shall make reasonable efforts to ensure that the person's conduct is compatible with the professional obligations of the lawyer;** and

(c) **a lawyer shall be responsible for conduct of such a person that would be a violation of the Rules of Professional Conduct if engaged in by a lawyer if**:

(1) the lawyer **orders** or, with the knowledge of the specific conduct, **ratifies the conduct** involved; or

(2) the lawyer is a partner or the lawyer individually or together with other lawyers has comparable managerial authority in the law firm in which the person is employed, or has direct supervisory authority over the

person, and **knows of the conduct at a time when its consequences can be avoided or mitigated but fails to take reasonable remedial action**.

H. ABA Formal Opinion 477[5] - Securing Communication of Protected Client Information: This opinion is an update of Formal Opinion 99-413[6] (which addressed a lawyer's obligations for protecting confidentiality when using email) to address the technology and ethics rules changes which have occurred since that time. Key points from the opinion include:

1. **Observations About How The Practice Has Changed Since 1999**: The committee notes that unlike 1999, lawyers today primarily use electronic methods of communication. Each device and storage location for those communications represents the possibility of unauthorized disclosure or access. Further, the ABA adopted technology amendments to the Model Rules in 2012 which affected Rule 1.1 (Competence) and 1.6 (Confidentiality).

   "At the same time, the term 'cybersecurity' has come into existence to encompass the broad range of issues relating to preserving individual privacy from intrusion by nefarious actors throughout the Internet. Cybersecurity recognizes a post-Opinion 99-413 world where law enforcement discusses hacking and data loss in terms of 'when,' and not 'if.'"[7] The opinion goes on to describe why law firms are particular targets for hackers and other cyber criminals.

2. **Reasonable Efforts Standard**: The committee concluded that the reasonable efforts standard "rejects requirements for specific security measures (such as firewalls, passwords, and the like) and instead adopts a fact-specific approach to business security obligations that requires a "process" to assess risks, identify and implement appropriate security measures responsive to those risks, verify that they are effectively implemented, and ensure that they are continually updated in response to new developments."[8]

3. **Reasonable Efforts Factors**: When conducting a fact-based analysis as to what level of security should be employed, practitioners should consider the following (pulling directly from Rule 1.6 Comment 18):

   a. The sensitivity of the information,

[5] See http://bit.ly/2HNSWEb, May 4, 2017.
[6] See http://bit.ly/2HRyB11, May 5, 1999.
[7] ABA Formal Opinion 477, lines 34 - 37.
[8] ABA Formal Opinion 477, lines 99 - 104.

b. The likelihood of disclosure if additional safeguards are not employed,

c. The cost of employing additional safeguards,

d. The difficulty of implementing the safeguards, and

e. The extent to which the safeguards adversely affect the lawyer's ability to represent clients (e.g., by making a device or important piece of software excessively difficult to use)

4. **Other Findings**:

a. "**A fact-based analysis means that particularly strong protective measures, like encryption, are warranted in some circumstances.** Model Rule 1.4 may require a lawyer to discuss security safeguards with clients. **Under certain circumstances, the lawyer may need to obtain informed consent from the client regarding whether to the use enhanced security measures**, the costs involved, and the impact of those costs on the expense of the representation where nonstandard and not easily available or affordable security methods may be required or requested by the client. **Reasonable efforts, as it pertains to certain highly sensitive information, might require avoiding the use of electronic methods or any technology to communicate with the client altogether**, just as it warranted avoiding the use of the telephone, fax and mail in Formal Opinion 99-413."[9]

b. "[T]he use of unencrypted routine email generally remains an acceptable method of lawyer-client communication. However, cyber-threats and the proliferation of electronic communications devices have changed the landscape and it is not always reasonable to rely on the use of unencrypted email."[10]

5. **Guidance Regarding Reasonable Steps**: The committee recommends the following considerations:

a. Understand the nature of the threat.

b. Understand how client confidential information is transmitted and where it is stored.

[9] ABA Formal Opinion 477, lines 116 - 124.
[10] ABA Formal Opinion 477, lines 135 - 139.

c. Understand and use reasonable electronic security measures.

d. Determine how electronic communications about client matters should be protected.

e. Label client confidential information.

f. Train lawyers and non lawyer assistants in technology and information security.

g. Conduct due diligence on vendors providing communication technology.

6. **Conclusion**: "A lawyer generally may transmit information relating to the representation of a client over the Internet without violating the Model Rules of Professional Conduct where the lawyer has undertaken reasonable efforts to prevent inadvertent or unauthorized access to information relating to the representation. However, a lawyer may be required to take special security precautions to protect against the inadvertent or unauthorized disclosure of client information when required by an agreement with the client or by law, or when the nature of the information requires a higher degree of security."[11]

V. **<u>TOOLS AND PROTOCOLS TO PROTECT CLIENT DATA</u>**: Now that you know the rules affecting this issue, here are some tools and techniques to keep your client data safe.

A. **Encryption Defined**: For purposes of this discussion, encryption can be defined as follows.

> "Encryption is the process of converting data to an unrecognizable or 'encrypted' form. It is commonly used to protect sensitive information so that only authorized parties can view it. This includes files and storage devices, as well as data transferred over wireless networks and the Internet.
>
> …
>
> An encrypted file will appear scrambled to anyone who tries to view it. It must be decrypted in order to be recognized. Some encrypted files require a password to open, while others require a private key, which can be used to unlock files associated with the key."[12]

[11] ABA Formal Opinion 477, lines 333 - 339.
[12] See http://techterms.com/definition/encryption

B. Lawyers Must Encrypt Laptops, Tablets and Phones:

1. **Duty To Protect**: If you are carrying confidential client data on any of these devices, "reasonable efforts" to maintain confidentiality cannot possibly include doing nothing to protect it.

> "Not properly protected, laptops and portable media can be recipes for a security disaster. One survey reported that 70 percent of data breaches resulted from the loss or theft of off-network equipment (laptops, portable drives, PDAs, and USB drives). Strong security is a must. Encryption is now a standard security measure for protecting laptops and portable devices—and attorneys should be using it."[13]

2. **PC Encryption**: If you've got a notebook computer, there's always the chance that someone will steal it or that you'll misplace or otherwise lose it. If you have confidential client information on the laptop, then it would be prudent for you to encrypt the laptop. Encryption would prevent a thief or finder of your laptop from obtaining any information from the hard drive, even if they remove the hard drive and install it in another computer. There are many choices for this type of software, including the following:

   a. **BitLocker** - included for free with Windows 8, 8.1 & 10 Professional.

   b. **Mac FileVault** - included for free with OSX.

   c. **SecuriKey Pro** - https://www.securikey.com/

   d. **Symantec Drive Encryption** - http://tinyurl.com/39seow

   e. **AlertBoot** - http://tinyurl.com/63h36wt

   f. **Folder Lock** - http://www.newsoftwares.net/folderlock/

   g. **SecureDoc Full Disk Encryption** from Winmagic Data Security - http://tinyurl.com/4vek6ot

3. **Smartphones**: All of the smartphone operating systems have free encryption built in, you must only enable it. Make sure you do this.

4. **Tablets**: Like smartphones, Android and iOS tablets have built-in encryption that you must simply turn on. Windows tablets may also have BitLocker depending upon the version of Windows installed. Of course,

[13] Encryption Made Simple for Lawyers, by David G. Ries & John W. Simek, GP Solo, November/December 2012 - see http://tinyurl.com/znh4jqz

any of the Windows encryption options above would also work (besides BitLocker).

C. Email Encryption:

1. **Revisit Rule 1.6, Comment 16/27**: Let's look at that again.

> "When transmitting a communication that includes information relating to the representation of a client, the lawyer must take reasonable precautions to prevent the information from coming into the hands of unintended recipients."

The questions to consider are: What constitutes "reasonable precautions" to protect the client's data; and do you have a reasonable expectation of privacy when you use email? I would argue that reasonable precautions means that you must encrypt your email when sending sensitive documents. Further, although the ethical rules and case law presume that lawyers have a reasonable expectation of privacy when sending an email, common sense has to tell you otherwise.

2. **What The Experts Say**: Here are a couple of quotes to consider.

> "A secure email account that the attorney is assured protects the content of correspondence. No attorney should use Gmail or other free services that in fact admit that they use personal information from email content. They should encrypt their client correspondence. Before sending sensitive correspondence, they should check by phone or text with the client to see what method of delivery is preferred."[14]

> "The level of encryption may vary based on practice areas or, more importantly, the firms' clients. At a minimum, emails and attachments that contain confidential data should be encrypted or sent through collaboration tools that send encrypted links rather than plain text data."[15]

> "It's all about encryption of the 3 main risk areas for data held: data in transit, at rest and in backups. It doesn't matter if it's email, Instant Messages, case files, discovery or 3rd party expert communications, the principle of

[14] Law Firm Data Security: Experts on How to Protect Legal Clients' Confidential Data, by Nate Lord, DigitalGuardian, October 13, 2015, quoting Robert Ellis Smith. See http://tinyurl.com/h6nzvjb.
[15] ibid., quoting Marco Maggio.

encryption is the ONLY way you can really satisfy due diligence requirements."[16]

3. **Email Encryption Services**: There are many ways to encrypt email, but the easiest is to use an encryption service. The options listed below are inexpensive and easy. They encrypt both the emails and any attachments to the email. In most cases, a password must be entered by the recipient to open the email and any attachments.

   a. **Office 365 Message Encryption**: http://bit.ly/2L8zW2I

   b. **Protected Trust**: https://protectedtrust.com/ - this is easily my favorite option.

   c. **RMail**: http://www.rmail.com/ - registered email service which can prove delivery + encrypted email

   d. **Trustifi**: https://trustifi.com/

   e. **SenditCertified**: http://www.senditcertified.com/ and note that they offer discounts through several bar associations.

   f. **EchoWorx Encrypted Mail**: http://tinyurl.com/h6sm668

   g. **Hushmail**: https://www.hushmail.com/

   h. **ZixMail**: https://www.zixcorp.com/

   i. **ShareFile**: https://www.sharefile.com/

4. **Encrypt Email Attachments**: Word, WordPerfect and every good PDF program including Acrobat offers file encryption. This functionality is built-in so you only have to learn how to use it. With file encryption file simply cannot be opened without a password. You email could unencrypted and simply say "Please see attached." However, the attached file containing the sensitive information would be encrypted on its own.

D. Wireless Encryption:

1. **Home or Work Wireless Connections**: If you rely on a wireless Internet connection at your office or home to work with sensitive client information, it goes without saying that your wireless router or access point should be properly encrypted. If you set it up yourself and aren't sure, then you should immediately secure the assistance of an expert to

[16] ibid., quoting Steve Santorelli.

ensure that your security is properly configured. Sometimes, it's as easy as calling the technical support line for the manufacturer of your router. The big companies that sell wireless routers all have technical support representatives that can walk you through the process over the phone. In case you're wondering, big names in wireless routers include Cisco, Linksys, Netgear, Belkin, TP-Link, D-Link and Asus, among others.

2. **Risk of Using Public WiFi**: First of all, you need to be educated about this subject. For a quick primer, here are two short articles that will bring this issue into focus: Here's what an eavesdropper sees when you use an unsecured Wi-Fi hotspot by Eric Geier, 6/28/13 (see http://tinyurl.com/ppm3oyc) and What Is A Packet Sniffer? by Andy O'Donnell, 12/15/14 (see http://tinyurl.com/jxvhf92). For an interesting discussion of this in the legal arena, see the now famous California Formal Opinion No. 2010-179 which states:

> "With regard to the use of a public wireless connection, the Committee believes that, due to the lack of security features provided in most public wireless access locations, **Attorney risks violating his duties of confidentiality and competence in using the wireless connection at the coffee shop to work on Client's matter unless he takes appropriate precautions, such as using a combination of file encryption, encryption of wireless transmissions and a personal firewall**. Depending on the sensitivity of the matter, Attorney may need to avoid using the public wireless connection entirely or notify Client of possible risks attendant to his use of the public wireless connection, including potential disclosure of confidential information and possible waiver of attorney-client privilege or work product protections, and seek her informed consent to do so."[17]

3. **How To Protect Yourself**:

   a. **Cellphone WiFi Hotspot**: Rather than connecting to the public WiFi where ever you are, consider using a cellular hotspot or MiFi. Properly configured, these connections are a secure way to connect your notebook or tablet to the Internet via the phone hotspot.

   b. **Consumer VPN Services**: There are many services that allow you to create a Virtual Private Network connection even though you're

[17] See http://tinyurl.com/3szklcx, emphasis added.

using a public and otherwise unsecured WiFi connection. "In the simplest terms, a VPN creates a secure, encrypted connection between your computer and the VPN's server. This tunnel makes you part of the company's network as if you are physically sitting in the office, hence the name. While connected to the VPN, all your network traffic passes through this protected tunnel, and no one in between can see what you are up to. A consumer VPN service does the same thing, but extends that protection to the public."[18] Here are some options for this. Private Internet Access is the one I use personally.

i. **NordVPN**: https://nordvpn.com/

ii. **Hide My Ass**: https://www.hidemyass.com/

iii. **Private Internet Access**: https://www.privateinternetaccess.com/

iv. **IPVanish**: https://www.ipvanish.com/

v. **ExpressVPN**: https://www.expressvpn.com

vi. **PureVPN**: https://www.purevpn.com/

vii. **StrongVPN**: https://strongvpn.com

viii. **Cloak** (Mac only): https://www.getcloak.com/

ix. **CyberGhost**: http://www.cyberghostvpn.com/en_us

x. **VyprVPN**: https://www.goldenfrog.com/vyprvpn

xi. **Hotspot Shield Elite**: https://hsselite.com/

xii. **Spotflux Premium**: http://spotflux.com/

E. Firewall:

1. **What Is a Firewall**: A firewall is a network security system designed to prevent unauthorized access to or from a private network. Firewalls can be hardware, software, or a combination of both.[19]

2. **Your Obligation**: You need to ensure that a firewall is in place at your office and anywhere you use your computer and connect to the Internet.

[18] The Best VPN Services for 2016, by Max Eddy, Fahmida Rashid, 3/9/2016, PCMag - see http://tinyurl.com/njuv7br.
[19] See http://www.webopedia.com/TERM/F/firewall.html

You can test yourself using services like ShieldsUP![20] or HackerWatch[21]. If you aren't sure if you are being protected, then you should contact a security expert to conduct a penetration test. Penetration testing (also called pen testing) is the practice of testing a computer system, network or Web application to find vulnerabilities that an attacker could exploit.[22]

F. **Password Manager**: On this subject, also see paragraph V.L.3. below (Secure Password Policy).

1. **What Is a Password Manager**: A password manager is a program that helps one store, create and organize passwords (and logons and websites, etc.).

2. **Why You Need A Password Manager**: First, it's part of your estate plan. Second, it's a place to keep logons, websites, account numbers and passwords all in one place. I use Dashlane and it will generate and store strong passwords for me (so I don't have to make them up). It will also let me know if my passwords are weak and recommend that I change them. It tells me how many different websites I'm using the same password for (it's not recommended that you use the same password for everything). It also lets me know if there are any reported security breaches for any of the websites it holds passwords for and recommend that you change them. Finally, it will hold all of my credit card information, secure notes about anything I want and personal information like my driver's license, passport, etc.

3. **Good Options**: Top rated password managers include the following (and I strongly recommend the versions you have to pay for - almost all offer a free version that is missing features):

    a. **Dashlane** - https://www.dashlane.com/

    b. **LastPass** - https://www.lastpass.com/

    c. **Sticky Password** - https://www.stickypassword.com/

    d. **1Password** - https://1password.com/

    e. **LogMeOnce** - https://www.logmeonce.com/

    f. **TrueKey** - https://www.truekey.com

[20] See https://www.grc.com/x/ne.dll?bh0bkyd2
[21] See http://www.hackerwatch.org/probe/
[22] See http://searchsoftwarequality.techtarget.com/definition/penetration-testing

g. **RoboForm** - https://www.roboform.com/

h. **Keeper Desktop** - https://keepersecurity.com/

G. Two Factor Authentication: This is also known as 2FA or multi factor authentication.

1. **What Is Two Factor Authentication?** Here's a good definition.

"Two-factor authentication (2FA), often referred to as two-step verification, is a security process in which the user provides two authentication factors to verify they are who they say they are. 2FA can be contrasted with single-factor authentication (SFA), a security process in which the user provides only one factor -- typically a password.

Two-factor authentication provides an additional layer of security and makes it harder for attackers to gain access to a person's devices and online accounts, because knowing the victim's password alone is not enough to pass the authentication check. Two-factor authentication has long been used to control access to sensitive systems and data, and online services are increasingly introducing 2FA to prevent their users' data from being accessed by hackers who have stolen a password database or used phishing campaigns to obtain users' passwords.

The ways in which someone can be authenticated usually fall into three categories known as the factors of authentication, which include:

1. **Knowledge factors** -- something the user knows, such as a password, PIN or shared secret.

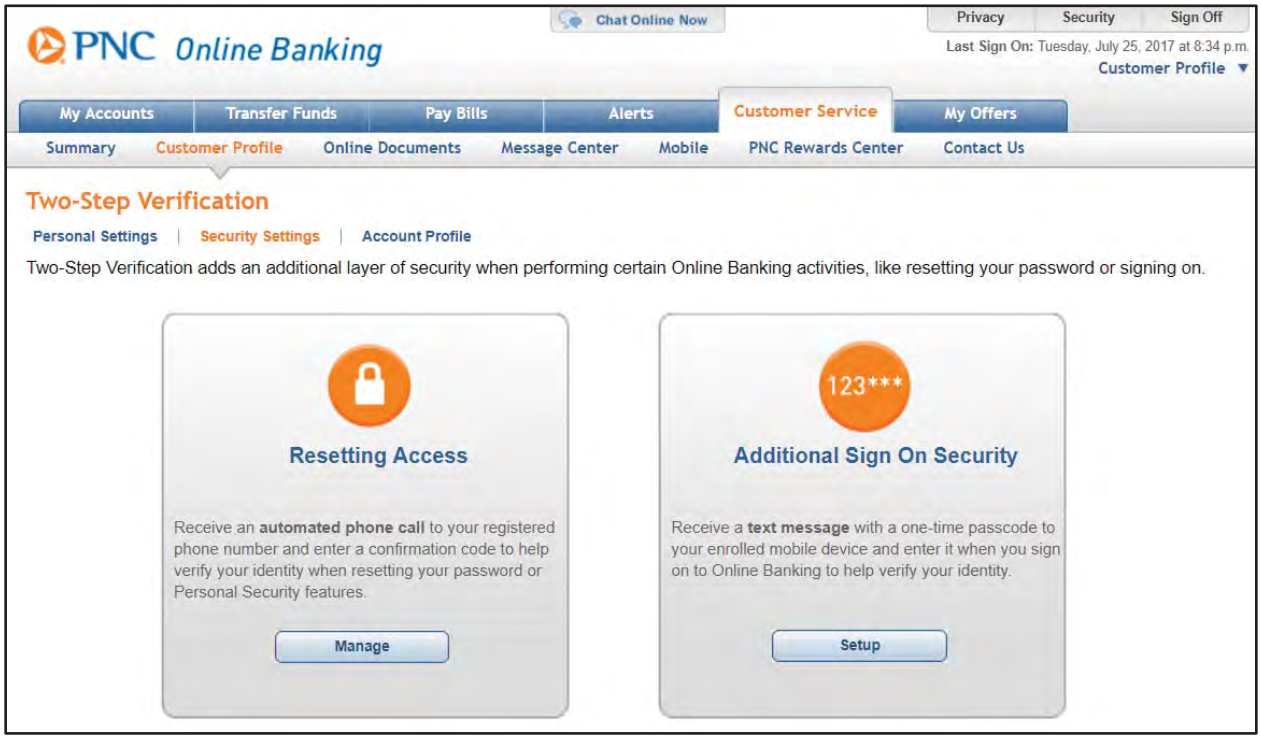
2. **Possession factors** -- something the user has, such as an ID card, security token or a smartphone.

3. **Inherence factors, more commonly called biometrics** -- something the user is. These may be personal attributes mapped from physical characteristics, such as fingerprints, face and voice. It also includes behavioral biometrics, such as keystroke dynamics, gait or speech patterns."[23]

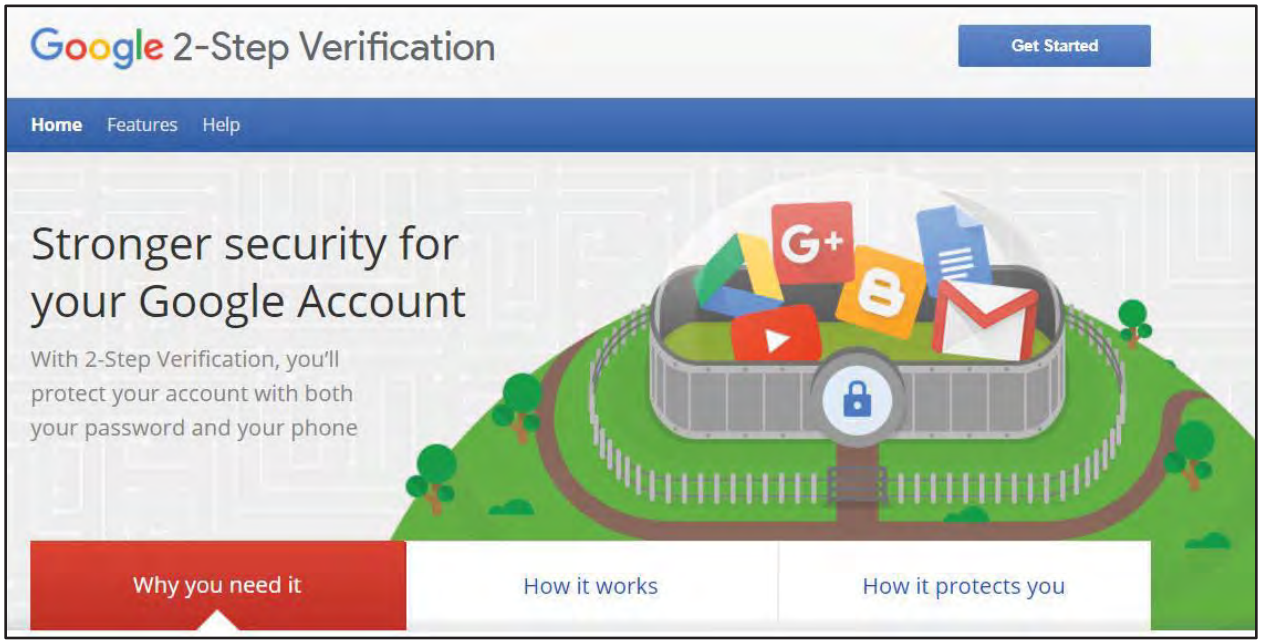
2. **How Do You Get 2FA?** For critical services you access online, check to see if they offer any type of 2FA. Keep in mind that 2FA is ANNOYING, but better security is almost always more annoying. If you want to protect

[23] See http://searchsecurity.techtarget.com/definition/two-factor-authentication

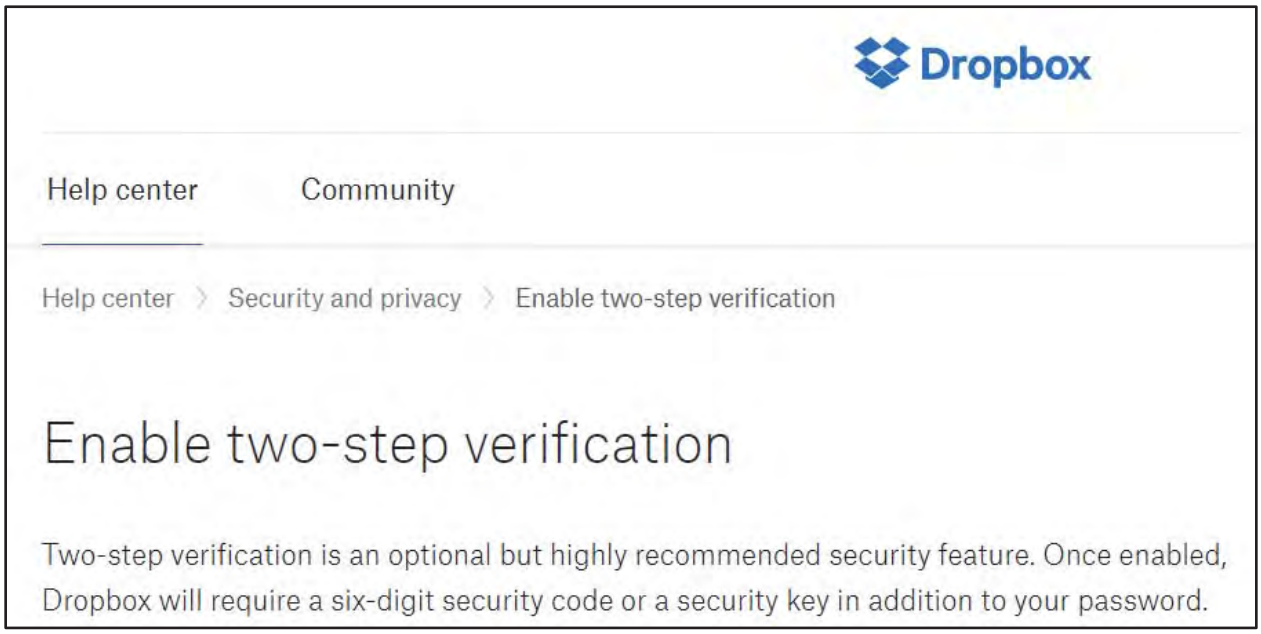
yourself well, be prepared to be slightly annoyed. Anyway, here are some 2FA ideas. Your bank probably offers it:



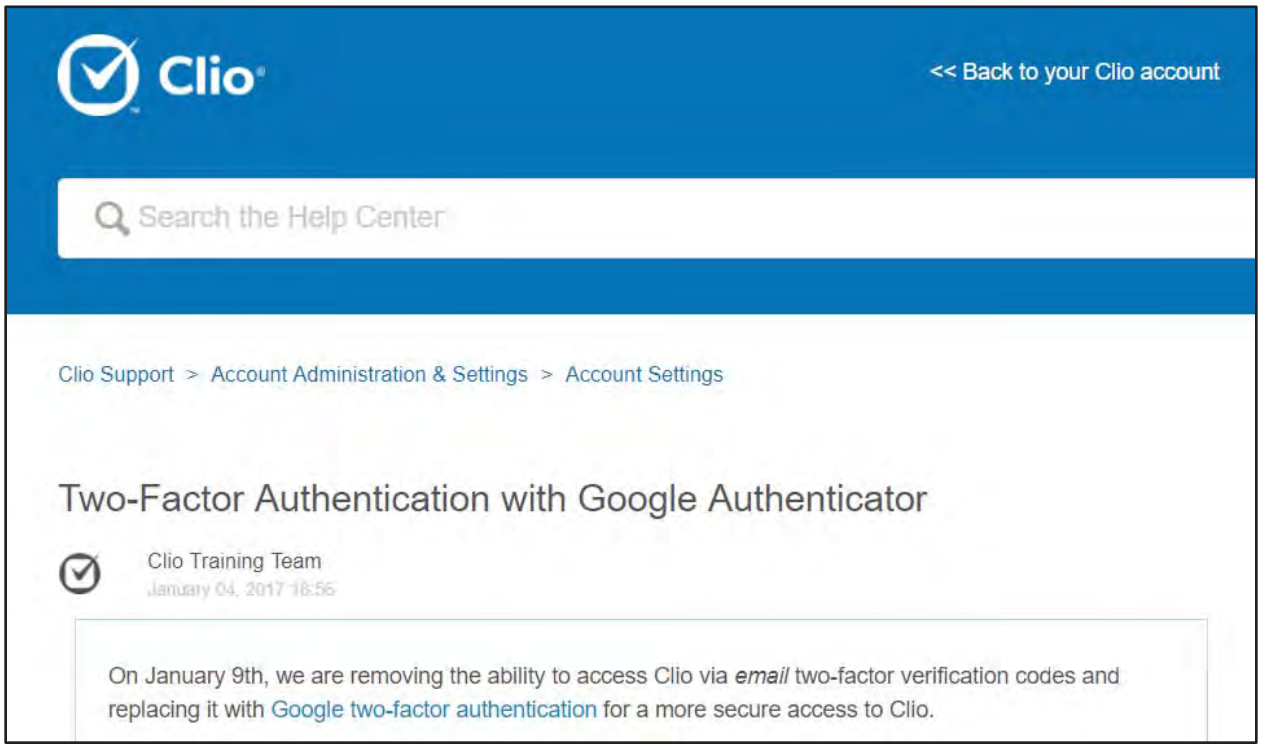
Your email account probably offers it:



Your file sharing service probably offers it:

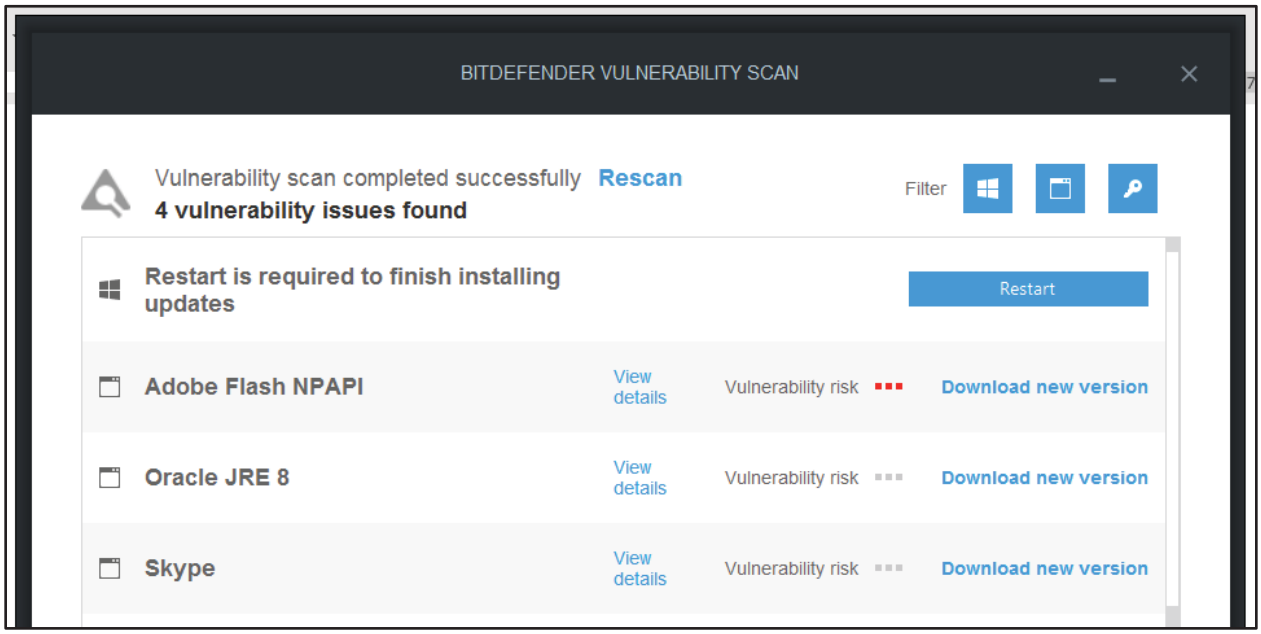


Your case management system probably offers it:



H. **Antivirus/Antimalware Software**: It is fairly common that users think they have protective software running when they actually do not. You should be able to confirm that protective software is running on your computer(s). Again, you may

need to consult an expert. I personally use Norton[24] which I *really* like. Of course, there are many good options available from McAfee, Webroot, Bitdefender, Symantec (Norton) and Kaspersky. A good security suite (like Bitdefender Internet Security 2016) provides antivirus, web protection, vulnerability testing (to make sure you have the latest versions of programs that may represent vulnerabilities), a firewall, intrusion detection, antispam and ransomware protection. For example, when I first ran the Bitdefender vulnerability test, it produced the following which not only told me which programs needed to be updated, but also provided links so I could get to them quickly:



I. **Secure File Sharing and Data Rooms**: Make absolutely sure that all file shares have a password required to access them.

1. **ShareFile by Citrix**: https://www.sharefile.com/ - This is a fantastic service that allows you to create virtual "rooms" for others and share documents with them securely. You decide what rights each user has to the collection of documents.

2. **Merrill DataSite Virtual Data Room**: See http://tinyurl.com/laam53o.

3. **Firmex Virtual Data Room**: See https://www.firmex.com/.

4. **SmartRoom Virtual Data Room**: See http://smartroom.com/.

5. **Ansarada Virtual Data Room**: See https://www.ansarada.com/

[24] See https://us.norton.com/antivirus

6. **IntraLinks Virtual Data Room**: See http://preview.tinyurl.com/lt6d899.

7. **Microsoft Office 365 or OneDrive for Business**: OneDrive is Microsoft's cloud storage offering and it comes with nearly every Office 365 plan. For only $5/user/month (Business Essentials plan), you get 1 TB of online storage. See this: http://tinyurl.com/h9mdn2v

8. **G Suite by Google Cloud**: The Basic edition is $5/user/month and includes 30 GB of cloud storage; the Business edition is $10/user/month and includes unlimited cloud storage. See your options here: http://tinyurl.com/kkocuto

9. **Dropbox Business Standard or Advanced**: Standard is $12.50/user/month and Advanced is $20/user/month. For an explanation of their business plans, see https://www.dropbox.com/business/plans-comparison.

10. **SpiderOak Professional**: See this for more: https://spideroak.com/business_pricing/

11. **Syncplicity**: See https://www.syncplicity.com/.

12. **Box.com**: https://www.box.com/pricing

13. **TrueShare**: http://www.trueshare.com/

14. **FileGenius**: http://www.filegenius.com/

15. **OneHub**: Secure file sharing - see https://onehub.com.

J. **Encryption Options for Online Sync Programs Like Dropbox, OneDrive, Box and Google Drive**: There are inexpensive and easy-to-use services that will encrypt your files before sync and file-sharing services. These services will effectively eliminate your ability to share files with individuals outside of your office, but they also provide complete protection for your files as they are encrypted before the sync service ever gets your files.

1. **Sookasa**: See https://www.sookasa.com/

2. **BoxCryptor**: See https://www.boxcryptor.com/en

K. **External Hard Drive and Flash Drive Encryption**: If you need to use external hard drives or flash drives, there are many choices for encrypted devices. Of course, you can also use encryption programs like BitLocker to encrypt external devices as well. In any event, here are some options:

1. **External USB Hard Drives**:

    a. **Apricorn Aegis Padlock 2 TB** USB external hard drive.

    b. **Fantom Drives DSH2000 DataShield 2TB** USB external hard drive.

    c. **Lenovo ThinkPad USB 3.0 Secure** Hard Drive.

2. **Flash Drives**:

    a. **Apricorn Aegis Secure Key** FIPS Validated 4 GB USB 2.0 256-bit AES-CBC Encrypted Flash Drive

    b. **Kingston Digital 8GB Data Traveler** AES Encrypted Vault Privacy 256Bit 3.0 USB Flash Drive

    c. **IronKey S250 8 GB** USB 2.0 Flash Drive

L. **Develop and Follow Policies**: There are many places to find sample policies for the following and a great resource is the SANS Institute. To see their sample policies, just go here: https://www.sans.org/security-resources/policies.

1. **Internet and Email Usage Policy**: There may be (and likely is) a big gap between what you would deem acceptable use of company internet and email and what your employees deem acceptable use of those resources. Thankfully, you can Google "internet usage policy" and find many free examples to start with.

2. **Document and Email Retention Policy**: Lawyers tend to hold onto every document and email forever and this is simply a bad policy. You can end up with so much irrelevant digital clutter that you're unable to find the things you actually need. Your policy should comply with any applicable federal or state laws, the Rule of Professional Conduct and any other relevant regulations. It's also a great idea to contact your malpractice insurer to see what they recommend (they may even have a sample policy you could start with). The ABA has a nice compilation of records and document retention resources (http://tinyurl.com/7z8ksye) and another excellent article to read on the subject is Sample Document-Destruction Policy by Megan Zavieh, 1/21/14, Lawyerist.com (see http://tinyurl.com/hrs3hxy).

3. **Secure Password Policy**:

    a. **Why You Need This**: You need a secure password policy because of the plethora password crackers that are out there.

b. **Types of Password Hackers**: Here are the main types (there are many more):

i. **Dictionary attack**: This attack uses a file that contains a list of words that are found in the dictionary. This mode matches different combinations of those words to crack your device open.

ii. **Brute force attack**: Apart from the dictionary words, brute force attack makes use of non-dictionary words too.

iii. **Rainbow table attack**: This attack comes along with pre-computed hashes. When user passwords are stored by a service (say www.Target.com), the raw (actual) passwords are converted into a string of random characters by complicated mathematical computations. This conversion process is called hashing. For an extremely interesting article on this technology, see Hacker Lexicon: What Is Password Hashing? by Andy Greenberg, June 8, 2016[25].

c. **Examples of Password Hackers**: Just so you can appreciate how readily available these are to anyone.

i. **John The Ripper** - http://www.openwall.com/john/

ii. **Aircrack-ng** - https://www.aircrack-ng.org/downloads.html

iii. **RainbowCrack** - http://project-rainbowcrack.com/

iv. **Crowbar** - https://github.com/galkan/crowbar

v. **Ophcrack** - http://tinyurl.com/3uyvmy

vi. **L0phtcrack** - http://www.l0phtcrack.com/#download-form

vii. **DaveGrohl** - https://github.com/octomagon/davegrohl

There are many others like Cain and Abel, THC Hydra and HashCat.

d. **Recommended Policy**: I will warn you that a really strong password security policy can be extremely annoying because most of them recommend that you change your password every 30 days, don't repeat old ones and use unique passwords for each logon. While I appreciate the value of those rules, they would drive most people

[25] See https://www.wired.com/2016/06/hacker-lexicon-password-hashing/

batty in short order. Here are some less annoying rules that will still help ensure your passwords are secure:

- 12 Characters, Minimum: You need to choose a password that's long enough. There's no minimum password length everyone agrees on, but you should generally go for passwords that are a minimum of 12 to 14 characters in length. A longer password would be even better.

- Include Numbers, Symbols, Capital Letters, and Lower-Case Letters: Use a mix of different types of characters to make the password harder to crack.

- No Dictionary Words or Combination of Dictionary Words: Avoid obvious dictionary words and combinations of dictionary words. Any word on its own is bad. Any combination of a few words, especially if they're obvious, is also bad. For example, "Wagon" is a terrible password. "RedWagon" is also very bad.

- Doesn't Rely on Obvious Substitutions: Don't use common substitutions, either — for example, "RedWag0n" isn't strong just because you've replaced an o with 0.[26]

4. **Mobile Device Security Policy**: This policy describes protocols that must be used when using notebooks, tablets or phones to conduct legal work.

5. **Equipment Disposal Policy**: The general rule is that no mobile device, PC or copier should ever be disposed of while it still contains client data.

6. **Litigation Hold Policy**: "If you don't have one, you're asking for trouble. If you know you have been sued or are the subject of a regulatory action, or that either one is likely to occur, you are under a litigation hold and must proceed expeditiously to preserve the relevant electronically stored information."[27] A couple of good resources to start with are:

   - Ten Things to Consider When Establishing a Legal Hold Policy by Stephanie Fox (4/26/2013), Association of Corporate Counsel, see http://tinyurl.com/zspaybw.

[26] See How to Create a Strong Password (and Remember It) by Chris Hoffman, 5/29/15, How-To- Geek, see http://tinyurl.com/kx6s7uf.

[27] Essential Law Firm Technology Policies and Plans by John W. Simek and Sharon D. Nelson, Law Practice Magazine, March/April 2012, see http://tinyurl.com/8yvvdkq.

- Implementing a Litigation Hold by Nicholas Panarella and Wook Kim, Kelley Drye LLP (2012) Practical Law Publishing Limited and Practical Law Company, Inc., see http://tinyurl.com/hh4kwy2.

M. **Training**: The biggest hole in every organization's security are the users. It is imperative that tools are provided and that training is mandatory.

VI. OTHER COMPONENTS OF A DISASTER AVOIDANCE STRATEGY:

A. **Paper Reduction**: Electronic files can easily be backed up, copied, duplicated, and held in many locations for safety. The less paper your office has to manage, the better. If you need advice on how to reduce paper without causing paper-dependent people to become uncomfortable (or angry), we can help.

B. **Go Cloud**: If you choose a secure vendor who understands and is willing to abide by the Rules of Professional Conduct (as arguably required by Rule 5.3), then having your critical information accessible from any device with internet access (plus your logon and password, of course) should provide quite a measure of comfort. If a law office stores all electronic data is on a server in the office, it's not uncommon for crashes to occur. Even if you have a good backup system, it may take multiple days and a lot of money to get everything back online. In our experience, law offices that rely on reputable cloud vendors simply don't experience that kind of thing.

C. **Mobile Communications**: Hosted VoIP[28] phone systems mean that the only thing you need in order to use your phone system is a desk phone or wireless headset connected to your computer. In our office, almost everyone has a wireless headset and a laptop. As such, my office phone works anywhere my laptop has an Internet connection. If my office burned to the ground, my phone system would be unaffected because it's not on-site.

D. **Mobile Hardware**: If you rely on (encrypted) laptops for all employees, then your office can be where ever you are. Not only do I have the convenience of working from where ever I want, if a disaster befell my physical office, it wouldn't shut us down. Of course, you can also buy portable printers/multifunction machines, scanners, and backup devices.

E. **Preventative Maintenance for On-Site Servers**:

1. **Managed IT Services**: Managed IT Services use a technology framework designed exclusively for monitoring, maintaining and supporting business networks - remotely, securely and proactively. This allows the provider to manage your network securely across the Internet without the need for

[28] VoIP stands for Voice Over Internet Protocol.

VPN connections or opening ports on your existing firewall. This approach minimizes downtime and increases productivity at your office because the managed services provider is often able to fix problems before anyone in your office even realizes there is a problem and the preventative maintenance is done in the middle of the night. Furthermore, most of these services also include "help desk" - software support for all users via phone, email and web meeting.

2. **Find a Good Computer Geek**: Server specialists can monitor your backups and event logs on your server for you. Many bad events can be predicted by checking these things. Tell your computer person that you want them to be pro-active in helping you avoid data loss. If they don't know what to do, find another computer person. Computer companies that know what they're doing are not going to be the cheapest option out there. If the lowest price is your primary determinant in choosing IT support, you're likely going to regret it.

F. Power Protection for Your Computers:

1. **Surge Suppressor/Uninterruptible Power Supply ("UPS")**: Without exception, every computer on the network (workstations or servers) should be plugged in to a UPS. Most units have both plugs that are supported by the battery in an outage, and plugs that just have surge suppression (for your laser printer). But even more important than outage issues are the effect brownouts can have on your computer equipment. A UPS will supply extra voltage to your computer equipment when the voltage from the wall falls below a certain level. How is this a crisis? Power issues can cause component failure, such as bad hard drives, bad motherboards, bad RAM, etc. Bottom line, having proper protection from electrical issues is like having insurance. You have to do it. Don't forget to protect all the other things that plug into your network, such as printers, speakers, scanners, hubs, switches, routers, modems, etc. Most laser printers draw too much power to be plugged into the battery backup outlets of a UPS unit, so make sure they are plugged into the surge suppression-only outlets.

2. **Get UPSs or Surge Suppressors on Everything Connected To Your Network**: Spikes can come in via any connected device. Get your switch/hub on a surge suppressor (recommend a UPS), make sure all of your printers and everything else connected to your computer is at least plugged into a surge suppressor.

3. **Plain Surge Suppressors**: You can get plain surge suppressors that are good (such as the Tripp Lite Isobar4 (part #ISOBAR4ULTRA). However, they cost as much ($41) as many UPSs but can't keep your PC running in the event of a black-out or brown-out. Be advised that the cheapo power strips are

just extension cords and aren't going to help you avoid problems. If you bought your surge suppressors in a 3 pack for $9.95 at Wal-Mart, you've wasted your money.

4. **Warning About VA Ratings**: Make sure the VA rating of your UPS is high enough to support the equipment you're plugging in. To determine a UPS's VA rating, then calculate the VA ratings (wattage) of what you're plugging in (amps x 120 volts). We had a client who had a Tripp Lite SmartUPS 1050 - ($347 – only 705 VA). He plugged in the following:

   - Dell Optiplex – 720 watts
   - Dell monitor – 180 watts
   - Printer – 936 watts

   The first time the power went out, he fried his Tripp Lite and it wouldn't even work again. Since he exceeded the VA rating, his warranty was void. Sadly, the Dell representative he bought the foregoing equipment from was the one who recommended this particular UPS. Since the computer alone exceeded the VA rating for the UPS, he obviously didn't know about this little issue either.

5. **Our Recommendation**: We recommend a 1500 VA UPS for a desktop computer and a 500 VA UPS for a laptop.

G. **Router/Firewall/Switch**: If you're going to have a network or you're going to have high speed Internet access, you must have one of these. We've had clients who were "hacked" the result of which was that confidential client information was compromised. It is malpractice per se if you leave yourself open to this possibility. Talk with your IT professional about how your network is protected against hackers and make sure you have the appropriate hardware and/or software in place.

H. **Antivirus Software**: This obviously isn't hardware, but you must have antivirus on every computer and your server(s) and their definitions must be automatically updated weekly. Anything less, and you leave yourself open for attack.

I. **Protect and Change Your Passwords**: Stop writing your passwords on sticky notes on your monitor. You need to change them periodically and keep them in a place where others aren't likely to find them. They should also be "strong" passwords which is a mix of numbers and letters (and usually one symbol like $ or %). No one should know your logon and password except you. The same goes for your server. **On the other hand**, you must require that every employee provide you with their current logon and password. Employees shouldn't be able to keep you out of *your*

computers because you don't know the password. If you want to see how long it would take a hacker to break your password with a "brute force" password hacking program, go to www.howsecureismypassword.net and enter some of your passwords.

J. **Don't Leave Your Computer On and Logged In**: When you leave the office for anything, either log off or lock the workstation. Locking the workstation is easily done by holding down on the Windows key on your keyboard (see picture to the right) while striking the L key. This will not exit your programs or cause your computer to re-boot. However, no one can access the computer unless they know your password (which they hopefully don't). Turn your computer off when you leave the office. If you have to leave it on because you're accessing it remotely via www.gotomypc.com or www.logmein.com, then at least log off and turn the monitor off. You'll still be able to log in remotely using either of those services.

K. **Stop Waiting For Computers to Die Before Replacing Them!** Replacement through attrition is the most expensive, disruptive and time wasting method of handling that task. In spite of that, most law firms only replace computer hardware when it finally dies. The useful life of a computer is 3 years, if you didn't buy a bargain, low-end computer in the first place. If you buy behind the curve and get a discontinued or under-powered computer, you've just handicapped your efficiency and shortened the useful life of the computer. Here's why you need to schedule the replacement of hardware before the hardware actually stops working:

1. **Data Loss**: Unless you're backing everything up on every computer, every day, then you're likely to lose something that was stored on the computer that stopped working or crashed.

2. **Pay Too Much**: You have no time to research, plan, or find the best price from the best vendor. You have to run out and buy a new computer, printer, etc. as quickly as you can. This will cost you lots of money because you're going to get the worst deal possible simply because you can't wait.

3. **Inappropriate Configurations**: Most bricks and mortar computer sellers cater mostly to the home market for computers. Their selection of business-oriented computers will be limited and they'll likely have very little good advice regarding what you should buy. Instead of getting Microsoft Office included with the new computer, you'll end up with games. Instead of Windows Vista Business, you'll get Windows Vista Home. Instead of an smaller hard drive appropriate for an office computer, you'll pay extra for a 500 GB drive you'll never even fill 10% of. Instead of simple speakers, you'll pay extra for 3D Surround Sound with a powered sub-woofer. You get the idea.

4. **Down Time**: It is very expensive for you or any of your employees to sit at their desks, unable to work. If your computers don't work, then you don't work.

5. **Charitable Deductions**: If your old computer actually works, then you could donate it to charity and take a legitimate tax deduction. If it doesn't work, then it'll probably set in your computer graveyard closet until you finally have to pay someone to take it away.

L. **Write Your Own Cookbook!** Firms can come to a screeching halt when a long-time administrative employee leaves or dies. This is the person who knows everything about your firm; and they are usually the *only* one who knows everything about your firm. When this person is gone, you can't find anything – not even paper towels! Typically this person is the only one who bills, the only one who writes checks, the only one who knows how you have always done things.

How do you get away from this dangerous situation? Create what we call a firm cookbook. Now, I know that sounds overwhelming and you think there is no possible way you could do that, but think again. Why do we call it a cookbook? Because you're going to add recipes to it, all broken down into steps. One recipe might be "How to Restore a File From Backup." It would tell you how to log onto the server, how to access the backup software, what to click on to see the list of files you can restore, and how to restore them. Another recipe might be "How To Run Invoices." It would explain in great detail how to run invoices from the fees and expenses entered into your accounting system.

Have each key employee take the time to carefully document every step they take in accomplishing all important tasks assigned to them. Yes, it can be time consuming, but if you don't do it now, it will never get done. Include everything from how you want your phones answered, to how you want prospective client calls handled, to billing processes, to supply ordering, and everything in between.

M. **Consider Business Interruption Insurance**: This may keep you going financially.

N. **Consider Cyber Insurance**: Some experts argue that for today's law office, this is essential insurance.

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Microsoft Word Power Tips

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Microsoft Word Power Tips
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WORD TIPS: Microsoft Word is perplexing because what you really need to know in order to control common formatting problems is concealed. Using the program over time does not reveal to you Word's secrets. The following is a program on how to deal with the most common problems Word users face.

TIP 1 - OBJECTIVES OF LEGAL WORD PROCESSING: It's important to keep these things in mind as we work through this:

1. **Increase Speed**: Using a word processor should allow you to go much faster than if you were using a typewriter. If you don't feel that it does, then you have much more to learn about the word processor.

2. **Increase Accuracy**: If you make the same types of mistakes you would make using a typewriter, then you're probably not letting Word help you with the process. There are many tools in Word designed to make sure you don't make mistakes or to correct the ones you do make.

3. **Use As Few Keystrokes As Possible**: Your over-riding objective should be to use as few keystrokes as possible to get the document to look the way you want. More on this later.

TIP 2 - IF YOU FIND WORD DIFFICULT TO CONTROL, YOU HAVE MORE TO LEARN: This is kind of a harsh assertion, but it's true. If you completely understand how Word works, you will simply avoid all of the formatting issues that may currently plague you. Those formatting glitches just don't happen in the first place so you don't have to waste time trying to fix them. Even if you didn't create the document you're editing and it's a total mess, understanding how Word works will allow you to quickly fix the problems and make the document formatting behave exactly as you want it to.

TIP 3 - FORMATTING MATTERS: How a document look and its readability impacts how readers feel about the drafter. Your clients can't judge your work substantively, but they still form opinions and many times, those opinions are based upon superficial things such as bed-side manner, responsiveness to phone calls and emails, and how the documents look that you deliver to them. Good typography helps hold the reader's attention and creates a professional appearance. The point is that it's something you should pay attention to.

TIP 4 - DOCUMENT SETS SHOULD HAVE CONSISTENT FORMATTING: If you're delivering a Will, Revocable Trust, Power of Attorney and Advanced Directives (Healthcare Proxies), those documents should look similar in terms of formatting. They should look like a "set" and have a professional look and feel. The should not look like a hodgepodge of miscellaneous formatting.

TIP 5 - DON'T VIOLATE OUTLINE RULES: Yes, there are specific rules to outline paragraph numbering and formatting which lawyers routinely violate. Here are the big two:

1. **Don't Number Only One Sub-Paragraph**: If you don't have a B. paragraph, you can't have an A. In that case, the paragraph should be un-numbered. If you have an Article with a single paragraph below it before the next article, that paragraph should not be numbered. In other words, the following is incorrect. The paragraph numbered 4.01 should be un-numbered because it is the sole paragraph under that Article.

ARTICLE IV.

DISTRIBUTION OF TANGIBLE PERSONAL PROPERTY

4.01 Upon the SETTLOR's death, tangible personal property located on real property owned by this Trust and used in connection with said real property shall, unless otherwise provided in this Agreement, pass with the real property. The TRUSTEE shall divide the SETTLOR's other tangible personal property into two parts. The first part shall include all tangible personal property which the TRUSTEE determines should be preserved for the SETTLOR's surviving children, taking into consideration the desires of the SETTLOR's children. The first part shall be divided among the children who survive the SETTLOR as they may agree, or, in the absence of agreement (or if any child is under a legal disability), as the TRUSTEE may determine. The TRUSTEE shall sell (or otherwise dispose of) the assets in the second part and the proceeds shall be added to the Trust residue and distributed as provided in ARTICLE V below. The TRUSTEE's determination made pursuant to this section shall be made by the TRUSTEE in the TRUSTEE's sole discretion and shall be conclusive and binding upon all persons interested in the SETTLOR's estate or any trust created hereunder.

ARTICLE V.

DISPOSITION OF TRUST ESTATE

5.01 **Provisions After the Deceased SETTLOR's Death**. Upon the SETTLOR's death, the balance of the trust property, after payment of or provision for the payments and distributions set forth in ARTICLE IV above, including any accrued and undistributed income

The foregoing should have looked like this:

ARTICLE IV.

DISTRIBUTION OF TANGIBLE PERSONAL PROPERTY

Upon the SETTLOR's death, tangible personal property located on real property owned by this Trust and used in connection with said real property shall, unless otherwise provided in this Agreement, pass with the real property. The TRUSTEE shall divide the SETTLOR's other tangible personal property into two parts. The first part shall include all tangible personal property which the TRUSTEE determines should be preserved for the SETTLOR's surviving children, taking into consideration the desires of the SETTLOR's children. The first part shall be divided among the children who survive the SETTLOR as they may agree, or, in the absence of agreement (or if any child is under a legal disability), as the TRUSTEE may determine. The TRUSTEE shall sell (or otherwise dispose of) the assets in the second part and the proceeds shall be added to the Trust residue and distributed as provided in ARTICLE V below. The TRUSTEE's determination made pursuant to this section shall be made by the TRUSTEE in the TRUSTEE's sole discretion and shall be conclusive and binding upon all persons interested in the SETTLOR's estate or any trust created hereunder.

ARTICLE V.

DISPOSITION OF TRUST ESTATE

5.01 Provisions After the Deceased SETTLOR's Death. Upon the SETTLOR's death, the balance of the trust property, after payment of or provision for the payments and distributions set forth in ARTICLE IV above, including any accrued and undistributed income

2. **Don't Change Numbering Schemes In the Middle of a Document**: In other words, if most of your document employs the following numbering for level 2 of your outline:

ARTICLE II.
BOOKS, RECORDS AND ACCOUNTING

1. Books and Records. The Company shall maintain complete and accurate books and records of its business and affairs as required by the Act and such books and records shall be kept at Company's principal office. Each Member shall have complete access to all books and records of the Company at the Company's offices during normal business hours.

2. Fiscal Year; Accounting. The Company's fiscal year shall be the calendar year. The particular accounting methods and principles to be followed by the Company shall be chosen by a Majority in Interest of the Class A Members.

3. Capital Accounts. The Company shall maintain a separate Capital Account for each Member. Each Member's Capital Account shall be increased by the Member's capital contributions and the Member's share of any Profits and items of income or gain of the Company. Each Member's Capital Account shall be decreased by distributions made to the Member and the Member's share of any Losses and items of expense or loss of the Company. In accordance with Section 1.704-1(b)(2)(iv)(q) of the Treasury Regulations, each Member's Capital Account shall be adjusted in a manner that maintains equality between the aggregate of all of the Members' Capital Accounts and the amount of capital reflected on the Company's balance sheet as computed for book purposes.

You shouldn't randomly switch to another formatting approach in subsequent areas of the document like this:

ARTICLE VIII.
MISCELLANEOUS PROVISIONS

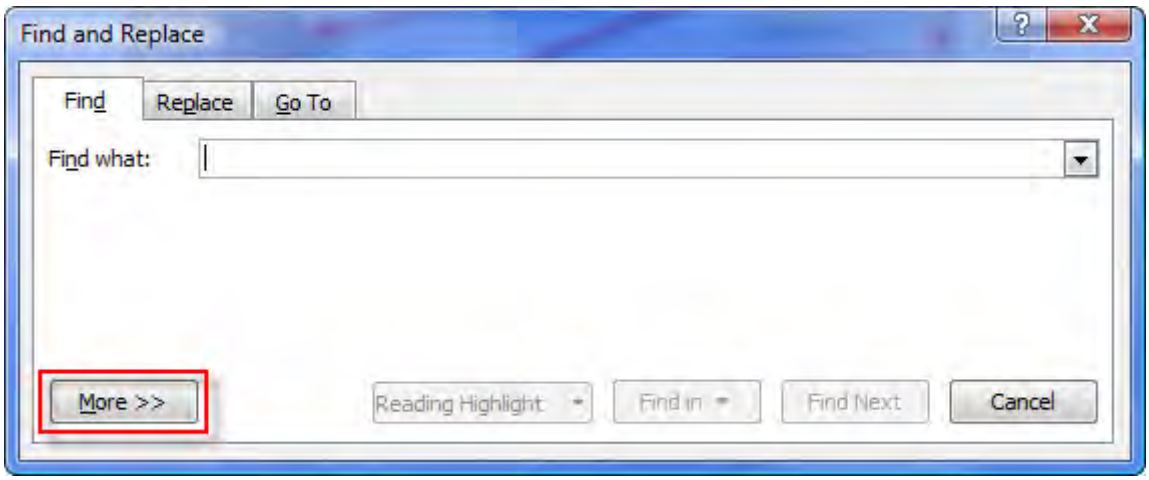
A. Indemnification. Except as otherwise provided in the Act, the Company shall indemnify, defend and hold harmless a Member from any claim or liability, and from any loss, cost or expense, including, but not limited to, attorneys' fees and court costs, which may be made or imposed upon such Member by reason of any act performed for or on behalf of the Company or in furtherance of the Company's business, or any omission to act, except for acts and omissions that constitute willful misconduct, fraud, bad faith or improper distributions to the extent set forth in the Act.

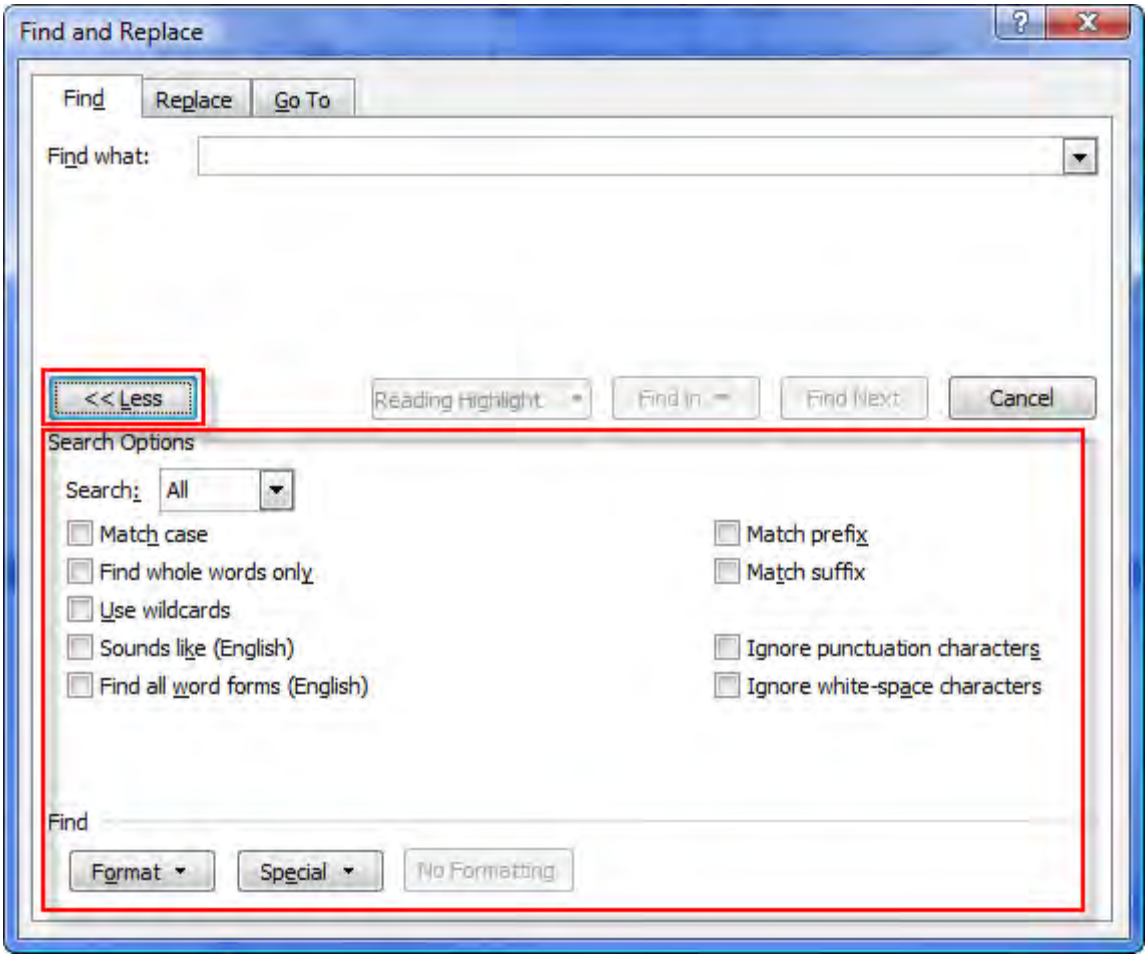
B. Terms. Nouns and pronouns will be deemed to refer to the masculine, feminine, neuter, singular and plural, as the identity of the person or persons, firm or corporation may in the context require.

C. Article Headings. The Article headings contained in this Agreement have been inserted only as a matter of convenience and for reference, and in no way shall be construed to define, limit or describe the scope or intent of any provision of this Agreement.

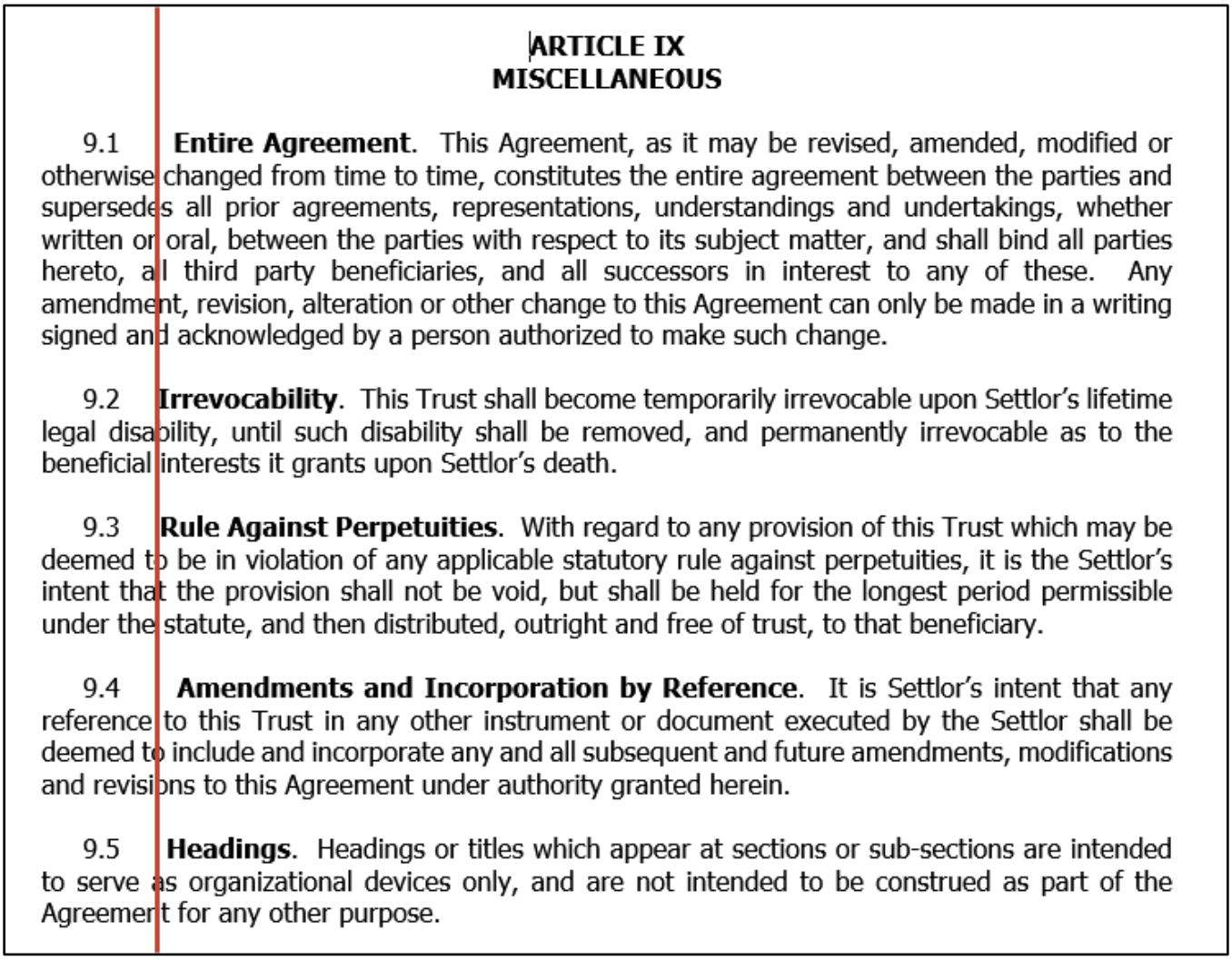
TIP 6 - IT SHOULDN'T BE PAINFUL: If in order to get the document to look the way you want you have to keep doing something over and over, you MUST be missing a feature that would make it easier. This is a very important rule and should be a big red flag when you're working on a document. For example, if you don't like the way your footnotes look so you're "fixing" them by manually selecting each one and changing its formatting one-at-a-time, that would constitute annoying, repetitive and laborious steps. Of course, there's a way to automatically change every footnote at once to look exactly the way you'd like in just a few keystrokes.

TIP 7 - YOU WANT MORE. Word has a nasty habit of hiding things you need to see. The only way you'll be able to see them is by clicking "More" buttons. If you see one in a dialog, *always* click it!




Find and Replace
Find
Replace
Go To
Find what:
<< Less
Reading Highlight
Find In
Find Next
Cancel
Search Options
Search:
All
Match case
Find whole words only
Use wildcards
Sounds like (English)
Find all word forms (English)
Match prefix
Match suffix
Ignore punctuation characters
Ignore white-space characters
Find
Format
Special
No Formatting

TIP 8 - YOU CAN'T LINE UP TEXT WITH SPACES: Because not every character occupies the same amount of horizontal space (even the same character like a space). For example, in the screen shot below, exactly five spaced were entered before and after each paragraph number. I inserted a red, vertical line into the screen shot so you can see how misaligned the paragraphs are even though each one contains the same number of spaces.



ARTICLE IX
MISCELLANEOUS

9.1 **Entire Agreement**. This Agreement, as it may be revised, amended, modified or otherwise changed from time to time, constitutes the entire agreement between the parties and supersedes all prior agreements, representations, understandings and undertakings, whether written or oral, between the parties with respect to its subject matter, and shall bind all parties hereto, all third party beneficiaries, and all successors in interest to any of these. Any amendment, revision, alteration or other change to this Agreement can only be made in a writing signed and acknowledged by a person authorized to make such change.

9.2 **Irrevocability**. This Trust shall become temporarily irrevocable upon Settlor's lifetime legal disability, until such disability shall be removed, and permanently irrevocable as to the beneficial interests it grants upon Settlor's death.

9.3 **Rule Against Perpetuities**. With regard to any provision of this Trust which may be deemed to be in violation of any applicable statutory rule against perpetuities, it is the Settlor's intent that the provision shall not be void, but shall be held for the longest period permissible under the statute, and then distributed, outright and free of trust, to that beneficiary.

9.4 **Amendments and Incorporation by Reference**. It is Settlor's intent that any reference to this Trust in any other instrument or document executed by the Settlor shall be deemed to include and incorporate any and all subsequent and future amendments, modifications and revisions to this Agreement under authority granted herein.

9.5 **Headings**. Headings or titles which appear at sections or sub-sections are intended to serve as organizational devices only, and are not intended to be construed as part of the Agreement for any other purpose.

Instead of spaces, you want to use tables, tabs and indents to line things up because those methods always work perfectly.

1. Tables:

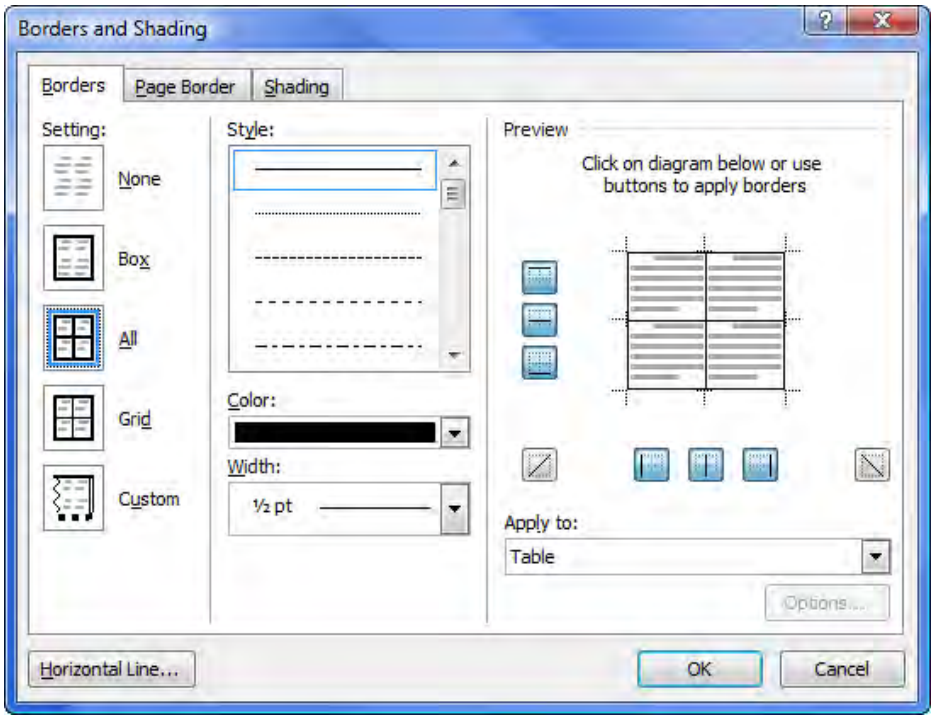
A. **What Is a Table?** Tables are similar to spreadsheets in that they're comprised of rows and columns of cells that you can fill with text and graphics. Tables are often used as a means of organizing information or aligning columns of text and/or numbers. Word also allows you to easily sort data and perform mathematical calculations in a table.

B. **Inserting a Simple Table**: To insert a simple table, place your cursor where you would like it to appear and click on the Insert ribbon ➔ Tables group ➔ Table button ➔ point your mouse down and to the right until the appropriate number of cells are selected (representing the number of rows and columns). Alternatively, you can click on the Insert Table… button under where you can simply enter the number of columns and rows that you would like.

Once your table is inserted, you can modify it in almost any way imaginable. The options for formatting a table are on the Table contextual tabs. **Your cursor must be in the table to see these options**.

C. **Basic Editing of a Table**:

i. **Add or Remove Cell Borders and/or Shading**: When you insert a table, it will have cell borders that print, but no shading. These options are controlled through Word's Borders and Shading feature. To modify the table borders or add shading, select the table, then click Table Tools Design ribbon ➔ Draw Borders launcher (Word 2007/10) or Borders launcher (Word 2013/16). The menus are fairly self-explanatory.

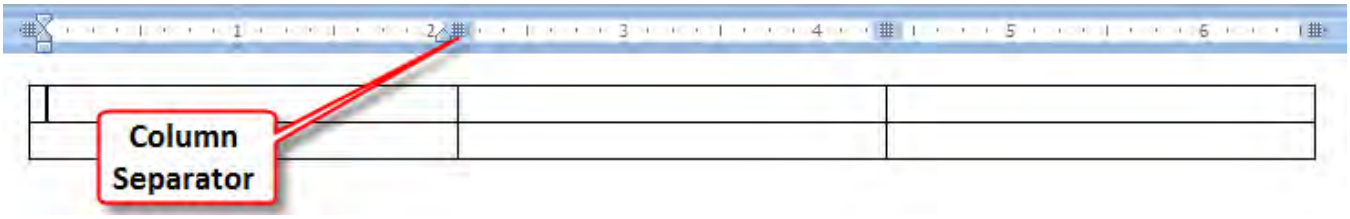


ii. **Change the Width of a Column**: The width of a column can be changed using any of the following methods:

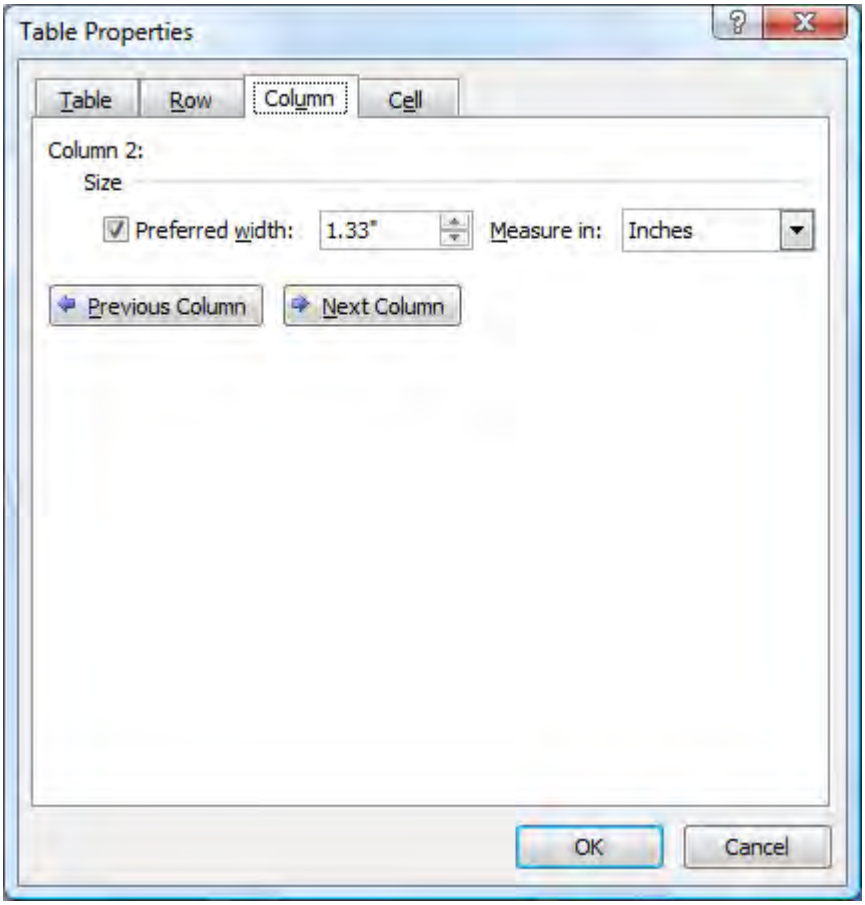
a. First, you can hover your arrow over the vertical line between columns and when the cursor changes from the standard arrow to a left/right arrow,

hold down on the mouse button and drag the vertical border to the left or right.

b. Second, you can adjust the column width on the horizontal ruler bar. First place your cursor somewhere in the table. In the ruler bar, you will see the column separators which you can and click and drag to the left or right. If the ruler is not shown, click on the View ribbon ➔ Show/Hide group (Word 2007) or Show group (Word 2010/13/16) ➔ check the Ruler box.

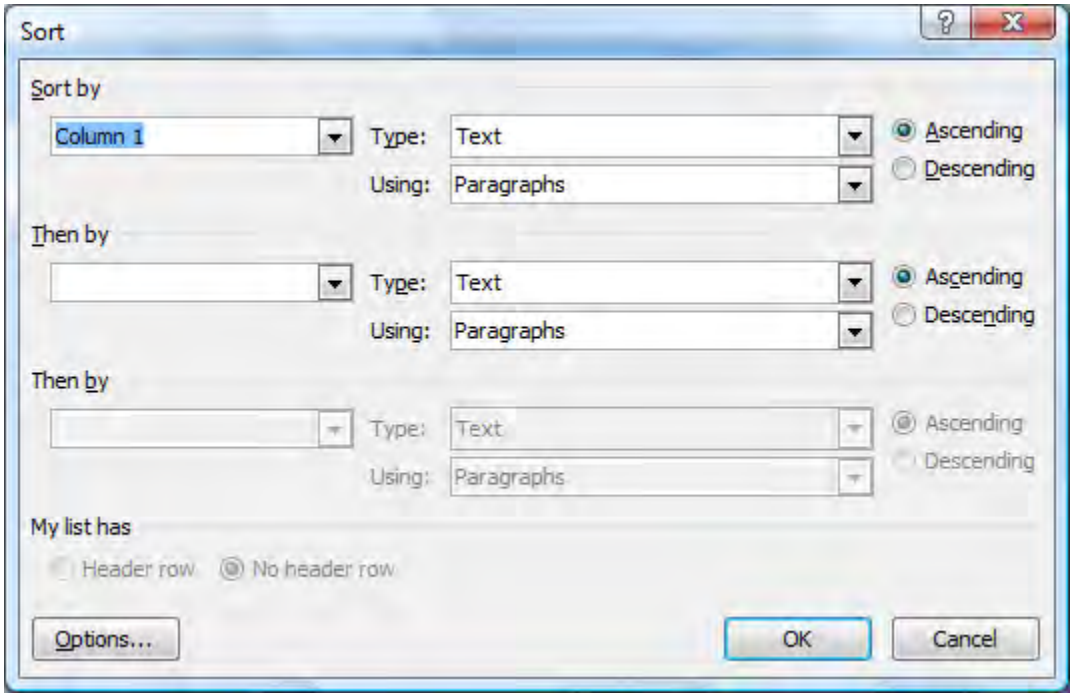


c. Finally, place your cursor somewhere in the table you want to modify, go to the Table Tools Layout tab ➔ Table group ➔ Properties button ➔ Column tab ➔ adjust the Width.



iii. **Change the Height of a Row**: You can change the Height of a Row by click on the Table Tools Layout tab ➔ Table group ➔ Properties button ➔ Row tab ➔ adjust the Height. In Word 2013/16, you can also drag the horizontal border up or down.

D. **Sort Data in a Table**: Simply place your cursor anywhere in the table (to sort the entire table) or select a specific column and go to the Layout tab ➔ Data group ➔ Sort…. Select the column you would like to sort by, the type of data that it holds and whether you would like it in ascending or descending order.



E. **Convert Text to a Table and Vice Versa**: If you would like to convert a table into plain text, simply select the table, then click Table Tools Layout ribbon ➔ Data group ➔ Convert to Text button. To convert text to a table, select it first and execute the foregoing steps except choose Insert tab ➔ Tables group ➔ Table button ➔ Convert Text to Table….

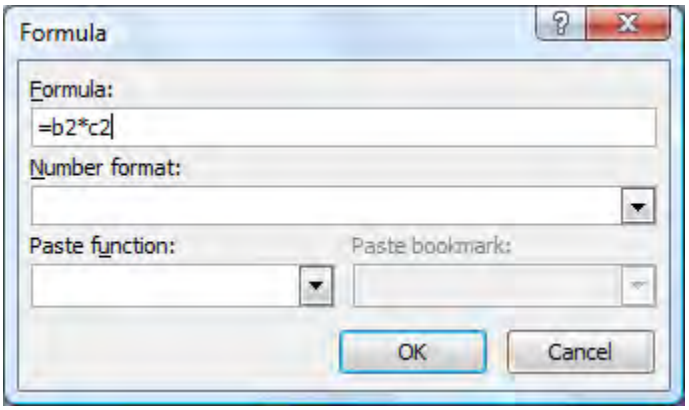
F. **Perform Calculations in a Table**: Assume you are working with the following table and you would like it to auto-calculate:

Description	Hours	Rate	Total
Last Will and Testament	1.5	$150.00	
Durable Power of Attorney	0.4	$150.00	
Revocable Trust	3.9	$150.00	
TOTAL			

In order to perform calculations, you must use the addresses of cells and they work exactly like an Excel spreadsheet. Imagine a letter over each column and a number to the

left of each row in order to figure out the address of each cell. To insert formulas in each cell, using the above example, execute the following steps.

i. Place your cursor in the fourth column on the Last Will and Testament row (row 2 - right below "Total"). Go to the Table Tools Layout ribbon → Data group → Formula button. Delete Word's guessed formula (=SUM(LEFT)) and replace it with =b2*c2. Choose a number format of $#,##0.00;($#,##0.00) and click OK.



ii. Repeat Step 1 for the 3rd and 4th rows, changing the cell addresses as appropriate (=b3*c3 and =b4*c4, respectively).

iii. Now click in the cell D6 and go to Table Tools Layout ribbon → Data group → Formula button . The formula =SUM(ABOVE) (which Word probably guessed) is correct so simply choose a number format and click OK.

iv. Your table should now look like this:

Description	Hours	Rate	Total
Last Will and Testament	1.5	$150.00	$ 225.00
Durable Power of Attorney	0.4	$150.00	$ 60.00
Revocable Trust	3.9	$150.00	$ 585.00
TOTAL			$ 870.00

Unlike an Excel spreadsheet, If you change any of the hour or rate numbers, the totals will not automatically update. In order to update the table, select the last column and hit the F9 key.

G. **When Should I Use Tables?** Law firms use tables for captions, signature blocks, multiple addressees of a letter, letterhead templates and any time they need to line up columns of text or numbers.

2. **Tabs**: Word's tab stops are set, by default, every one-half inch. So, unless you specify otherwise, every time you hit the Tab key, the cursor will advance to the next half-inch mark on the Horizontal Ruler. The default tab stops are Left tabs (described below).

A. **Change the Default Tab Stops**:

i. Click the Home ribbon ➔ Paragraph launcher ➔ Tabs… button in the dialog.

ii. Change the Default tab stops dropdown setting to the desired increment (perhaps every one inch).

iii. Click OK when finished.

B. **Types of Tabs**: Word has five types of tab stops: Left, Center, Right, Decimal and Bar. These tab stops are easily inserted into a document by clicking on the Tab Alignment Box and clicking on the Horizontal Ruler. If you do not see the horizontal ruler, click the View ribbon ➔ Show/hide group (Word 2007) Show group (Word 2010/13/16) ➔ check the Ruler box.

i. **Left tab**: Text entered after this tab is left-aligned.

ii. **Center tab**: Text entered after this tab is centered.

iii. **Right tab**: Text entered after this tab is right-aligned.

iv. **Decimal tab**: Numbers entered after this tab are aligned along their decimal point (or just after the last numeral if there is no decimal point).

v. **Bar tab**: Inserts a vertical line into the document.

C. **Set Specific Tab Stops**: It is important to note that when you manually insert a tab stop, it nullifies all of the default tab stops to the left of the manually inserted tab stop.

i. Click the Tab Alignment Box (the small box at the far left of the Horizontal Ruler) until you see the type of tab stop you want to insert. Repeatedly clicking on the Tab Alignment Box will cycle you through all the available tab stops.

ii. When the type of tab stop you want to insert is displayed in the Tab Alignment Box, click on the Horizontal Ruler at the place you want to set the tab stop (see below for examples).

Left	Bar	Center	Right	Decimal
Facility		**Physician**	**Patient**	**Bill Amount**
Riverside Hospital		Dr. Doolittle	Elvis Presley	$587.21
Grant Hospital		Dr. Pain	Orville Reddenbocker	$6,110.60
Park Medical Center		Dr. Welby	Wilt Chamberlain	$12,662.30

As you can see, the tab stops line up the text beneath them by their name (right, left, center, decimal). The bar tabs are not really tab stops; they merely insert vertical lines wherever they're placed.

D. **Clear Specific Tabs**: Click and drag the undesired tab from the Horizontal Ruler into the document area. Once you release the left mouse button, the tab will disappear.

E. **Clear All Tabs**:

i. Highlight the desired paragraphs or the entire document (SK: Ctrl + A).

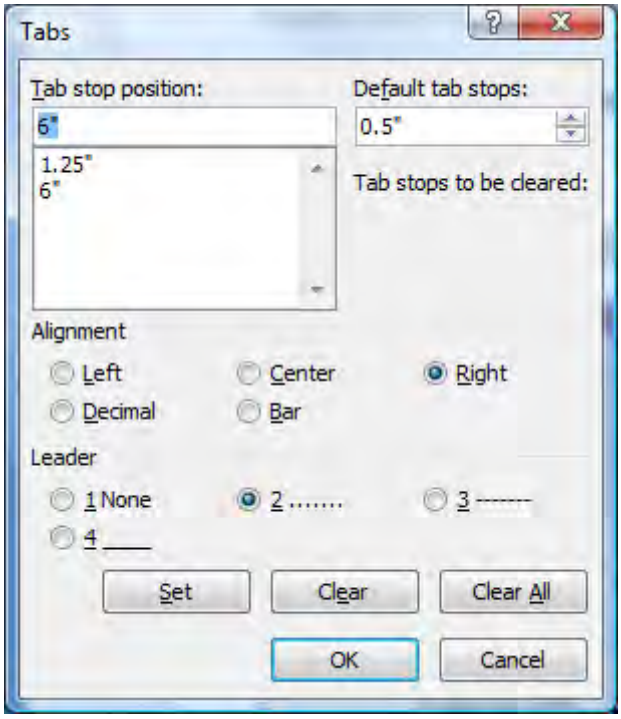
ii. Click the Home ribbon ➔ Paragraph launcher ➔ Tabs… button**.**

iii. Click the Clear All button.

If you want to clear all of the tabs from a paragraph, click in the paragraph and hit Ctrl + Q. This will clear all paragraph formatting, including tabs.

F. **Tab Leaders**: Tab Leaders fill the empty space before tab stops with dots, dashes or underscores. For an example, follow these steps:

i. Click the Home ribbon ➔ Paragraph launcher ➔ Tabs.. button. Add a RIGHT tab at 6" and click the #2 dot leader.



ii. Now type "Chapter 1", hit the Tab key, then type "13" so it looks like this:

Chapter 1..... 13

iii. As you can see, the tab leader filled in the blank between "Chapter 1" and the page number, 13.

G. **Signature Lines**: You should use tab stops to create signature lines in your documents. For an example, follow these steps:

i. Set your left and right page margins at 1 inch (Page Layout ribbon ➔ Page Set up group ➔ Margins).

ii. Click Home ribbon ➔ Paragraph launcher ➔ Tabs… button.

iii. Set a left tab stop at 3 inches, 3.5 inches, and 6.5 inches with NO leader.

iv. Click OK.

v. Now turn on Underline by clicking the Home ribbon ➔ Font group ➔ Underline button (SK: Ctrl + U), hit a tab key; turn off Underline by clicking on the Underline button again (SK: Ctrl + U) and hit another tab key; turn on Underline again and hit another tab key. Hit Enter twice, then another tab key. You should have perfect witness and signature lines as shown below:

3. Indents:

A. **Types of Indents**: There are several kinds of indents.

i. **First line Indent**:

This paragraph is an example of a first line indent. The first line of the paragraph, and the first line only, is indented at one-half inch. First line indents are most common in letters, memos, and pleadings.

ii. **Hanging Indent**:

This paragraph is an example of a hanging indent. The first line of the paragraph is not indented, but the second and remaining lines are. Hanging indents are most commonly used in numbered lists or bullet point lists.

Another example:

1. This is another example of a hanging indent. This sentence, and the remaining sentences are indented by highlighting this portion of the text, grabbing hanging indent tab on the ruler and dragging it over to the desired position.

iii. **Left Indent**:

This paragraph is an example of a left indent. *All* the lines in the paragraph are set away from the left margin. This is very commonly used in outlines, pleadings, or case-law summaries.

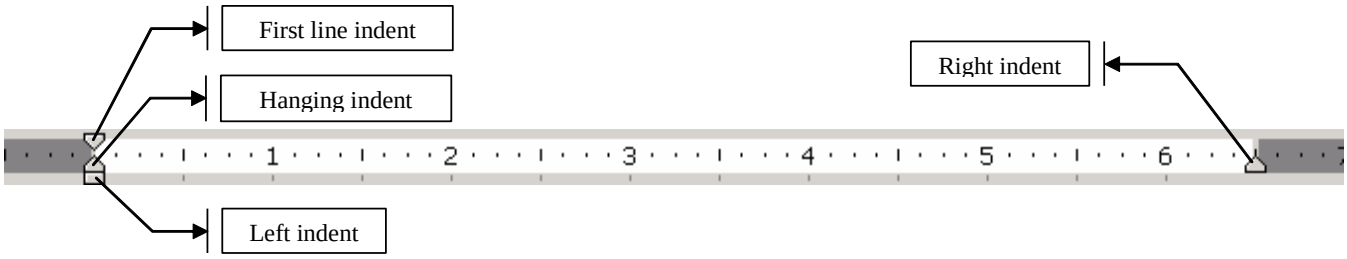
iv. **Right Indent**:

This paragraph is an example of a right indent. *All* the lines in the paragraph are set away from the right margin.

v. **Dual Indent**:

This paragraph is an example of a dual indent. This indent is very commonly used for quotes in pleadings, articles, and briefs.

B. **Indent Using the Horizontal Ruler**: If you do not see the ruler on the screen, click on the View ribbon ➔ Show group ➔ check the Ruler box. You should see three gray triangles and a box on the ruler. The triangles and the box are indent markers and each represents a different type of indent. See below.

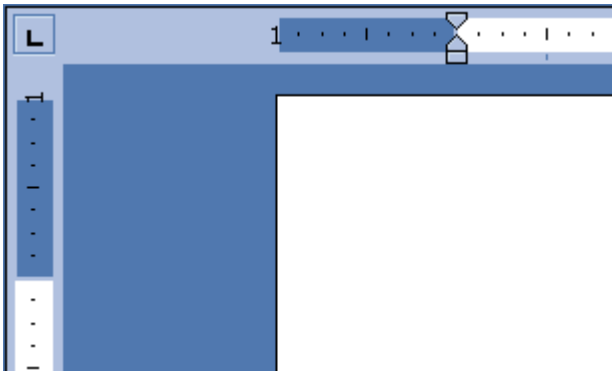


To indent using the ruler, follow these steps:

i. Click anywhere inside the paragraph or highlight part of each of the desired paragraph(s).

ii. Drag the indent marker(s) to the desired position.

iii. Indent Using the Tab Selector



You can also set the first line and hanging indents by clicking the Tab Alignment button (which is above the vertical ruler and to the left of the horizontal ruler) until you see the first line or hanging indent symbols and then clicking on the ruler to insert them. Click the alignment box until it looks like this (first line indent) or like this (hanging indent) and then you can click on the Horizontal Ruler.

C. **Indent Using Keystrokes**: Click anywhere inside the paragraph or highlight all the desired paragraph(s).

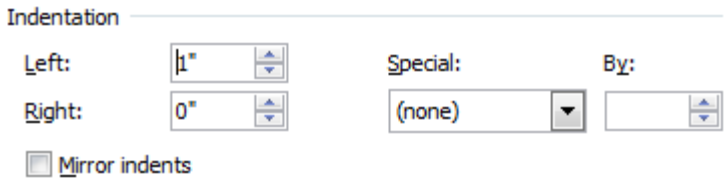
Ctrl + T .....Hang the indent to next tab position
Ctrl + Shift + T.....Un-hang the indent to the previous tab
Ctrl + M.....Shift the left indent to the next tab
Ctrl + Shift + M .....Return the left indent to the previous tab

D. **Indent with the Paragraph Dialog Box**:

i. Click anywhere inside the paragraph or highlight all the desired paragraph(s).

ii. Click the Home ribbon ➔ Paragraph launcher ➔ Indents and Spacing tab.

iii. Select the desired Alignment, Indentation and, under Special, specify if you want the first line of the paragraph to have a hanging indent, a first-line indent or neither (none).



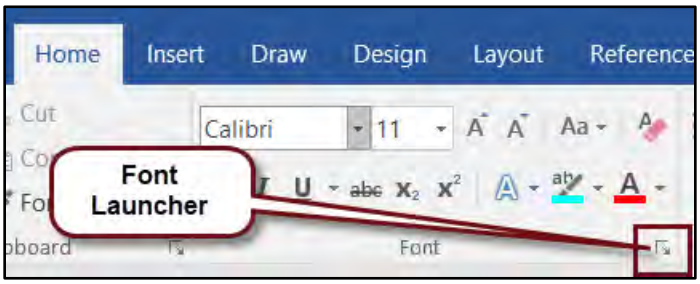
TIP 9 - CONTROL DOCUMENT DEFAULT FORMATTING OR WORD WILL MAKE YOU SUFFER

1. **Word's Formatting Defaults Need To Be Fixed**: Word comes with default font, paragraph and section formatting. Much of it is inappropriate for drafting legal documents. So here's how you fix them permanently.

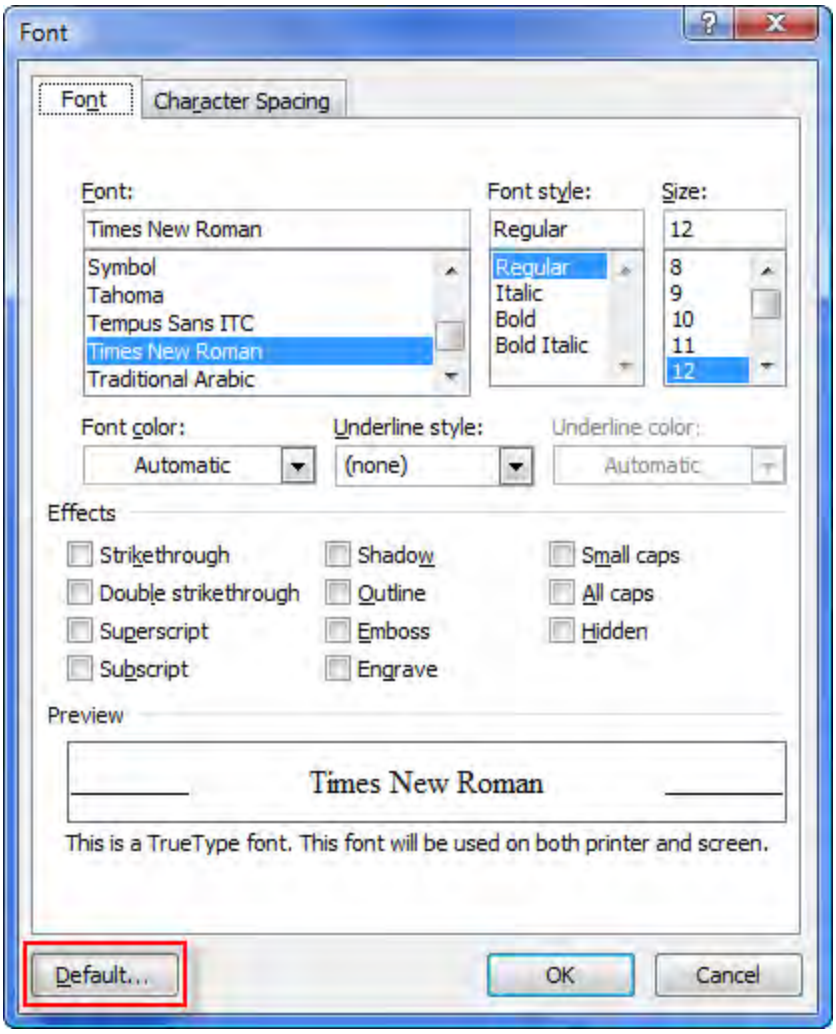
   A. **Change Your Default Font Formatting**: If you don't like Calibri 11 or Word's other defaults related to Fonts, simply follow these steps to fix them:

      i. Open a blank document in Word

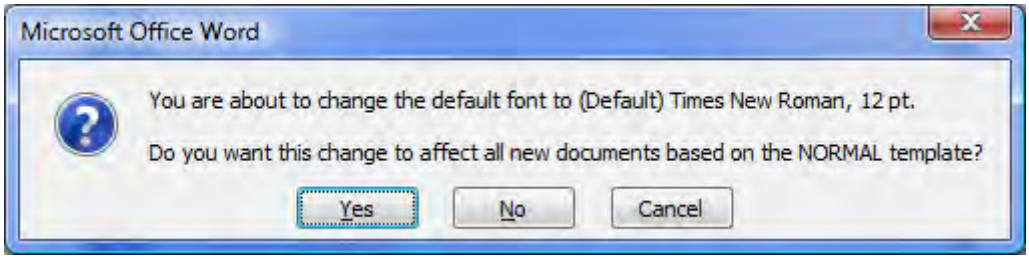
      ii. Click Home ribbon | Font launcher. This will make the Font dialog appear.



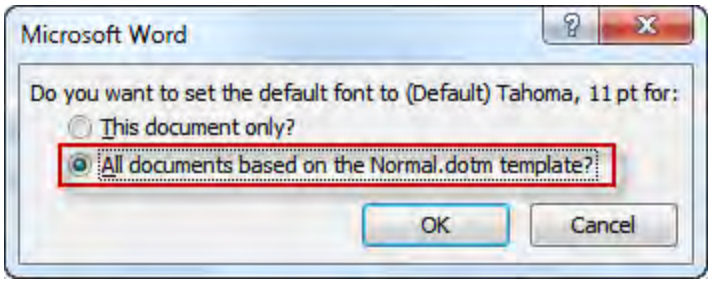
      iii. Make your adjustments to the font size and click the Default button (Word 2007: Default… or Word 2010/13/16: Set as Default) at the bottom of the dialog.



iv. In word 2007, you'll see the following dialog/warning. Click Yes and you're done!



In Word 2010/13/16, you'll see the following dialog. Make sure you check All documents based on the … before you click the OK button.



B. **Change Your Default Paragraph Formatting**: Simply follow these steps to fix them.

i. Open a blank document in Word

ii. Click the Home ribbon ➔ Paragraph launcher. This will make the Paragraph dialog appear.

iii. **Recommended changes** to the Paragraph dialog (Indents and Spacing tab):

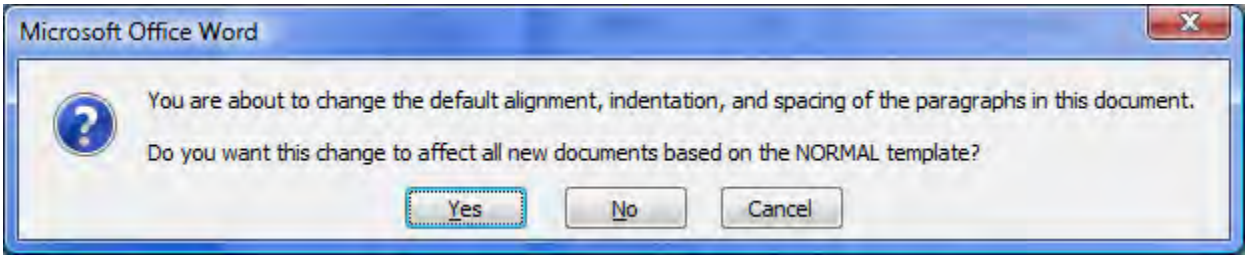
iv. Leave left and right indentation at 0" and Special at "(none)"

v. Make spacing before and after 0 pt.

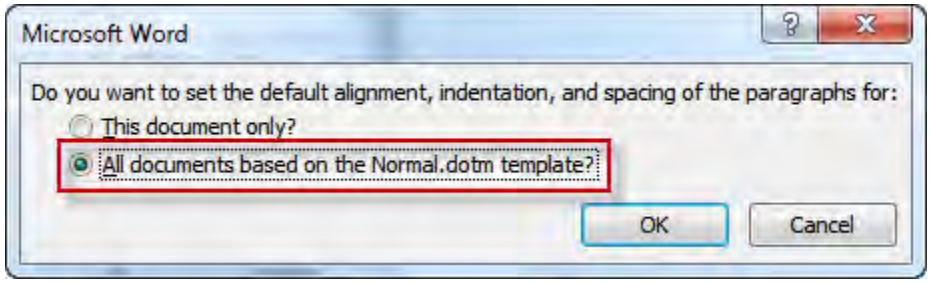
vi. Line spacing Single

vii. If you prefer, switch the Alignment to Justified

viii. In Word 2007, after making your paragraph formatting adjustments, click the Default… button at the bottom of the dialog. Click Yes and you're done!



In Word 2010/13/16, click the Set As Default button. Make sure you check All documents based on the… before you click the OK button.



C. **Change Your Default Section Formatting**: Simply follow these steps.

i. Open a blank document in Word

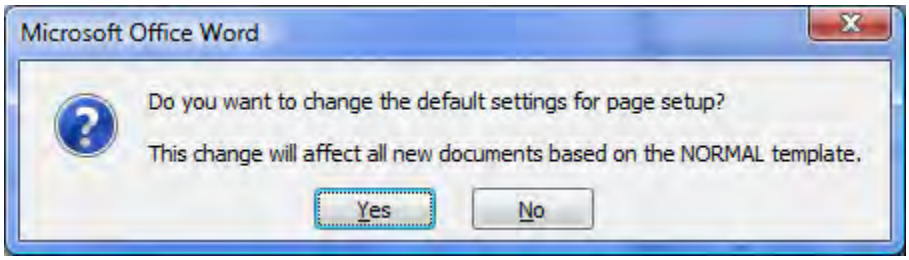
ii. Select the Page Layout ribbon ➔ Page Set Up launcher. This will make the Page Setup dialog appear.

iii. **Recommended changes** to the Section dialog:

iv. Margins tab: Most legal users prefer 1" margins on all sides

v. Layout tab: If you normally do not page number the first page of your documents, check the box for Different First Page.

vi. After making your page setup adjustments, click the Default button (Word 2007: Default… or Word 2010/13/16: Set As Default) at the bottom of the dialog. Next, you'll see the following dialog/warning. Click Yes and you're done!



2. **Default Settings Do Not Affect Existing Documents**: It is important to note that the foregoing changes to your default template do not affect, in any way, documents you've created in the past. In other words, when you open a document you created before making these changes, it will retain its original formatting and will not automatically morph to your new default settings. The changes made previously will only apply to **new** documents you create in Word.

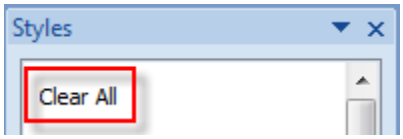
Initially, you might wish that default setting changes would automatically affect your existing documents. However, it would be extremely problematic if that were the case because every time you created a document and formatted it just the way you wanted, it would completely reformat itself as soon as someone else opened it in Word (assuming that their formatting defaults weren't exactly like yours).

3. **Sometimes Its Easier To Nuke the Formatting and Start Over**: If you've got text that is doing some crazy thing you can't figure out, there's always a way to get rid of all formatting and start over.

A. **Wipe Out All Font and Paragraph Formatting**: This really means that you strip off any manually applied formatting and take the text back to whatever formatting is the default for the document. Try these techniques:

i. Select the text → click Home ribbon → Font group → Clear Formatting button (Word 7/10's button) , (Word 13/16's button) .

ii. Select the text → click Home ribbon → Styles launcher → Clear All in the Style dialog.



B. **Strip Font Formatting**: Select the text → Ctrl + Spacebar.

C. **Strip Paragraph Formatting**: Select the text → Ctrl + Q.

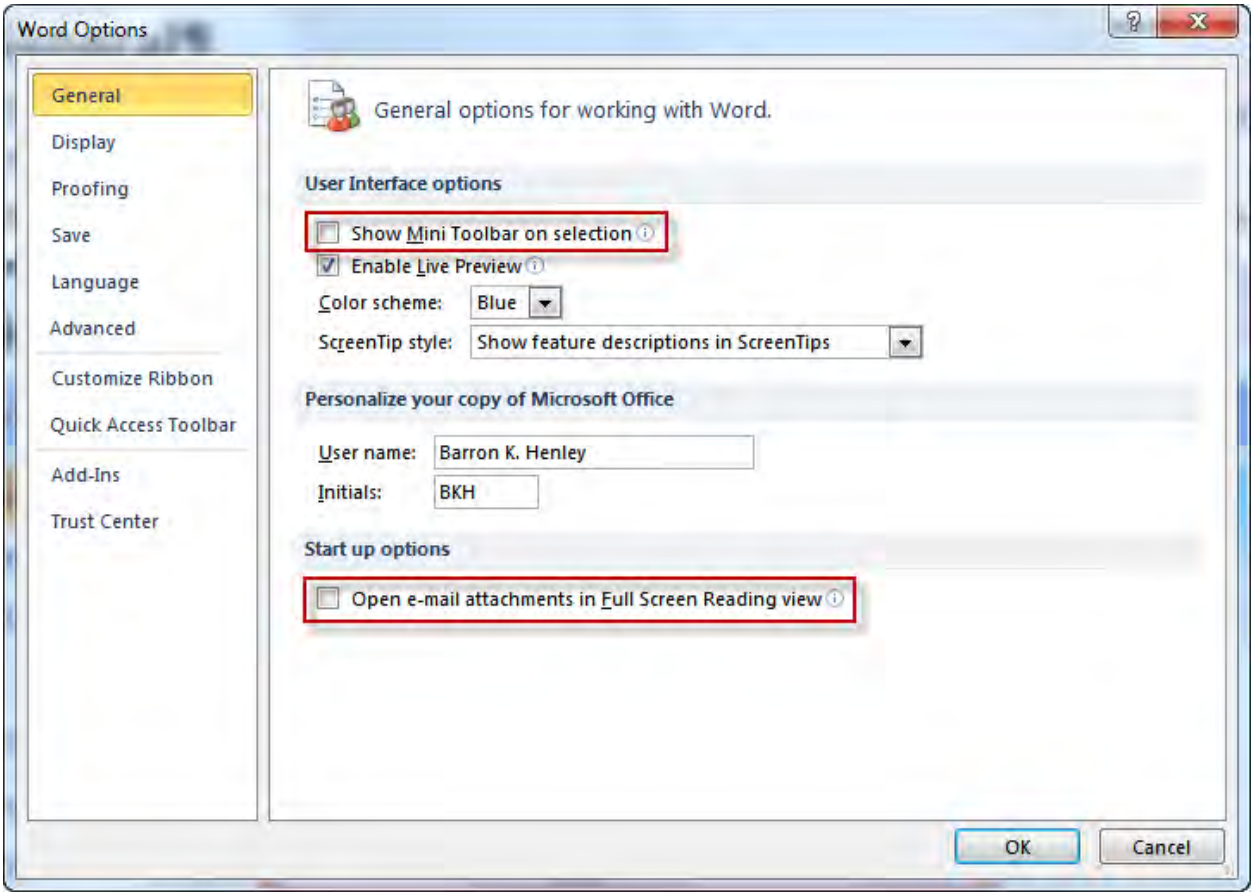
TIP 10 - FIX WORD'S PROGRAMMATICAL DEFAULT SETTINGS: Specifically, Word's programmatical defaults are terrible and also need to be fixed. Many of the frustrations users feel about Word stem from its default settings. These can be fixed and you only need to do it once. The following are the changes we recommend for each version of Word.

1. Default Setting Changes for Word 2010:

A. **In General**: The default setting changes for Word 2010 are a bit different than Word 2007 so follow these steps if you're using Word 2010.

NOTE that you get to all of the following screens by clicking File Menu → Options.

B. **Options ➔ General**:

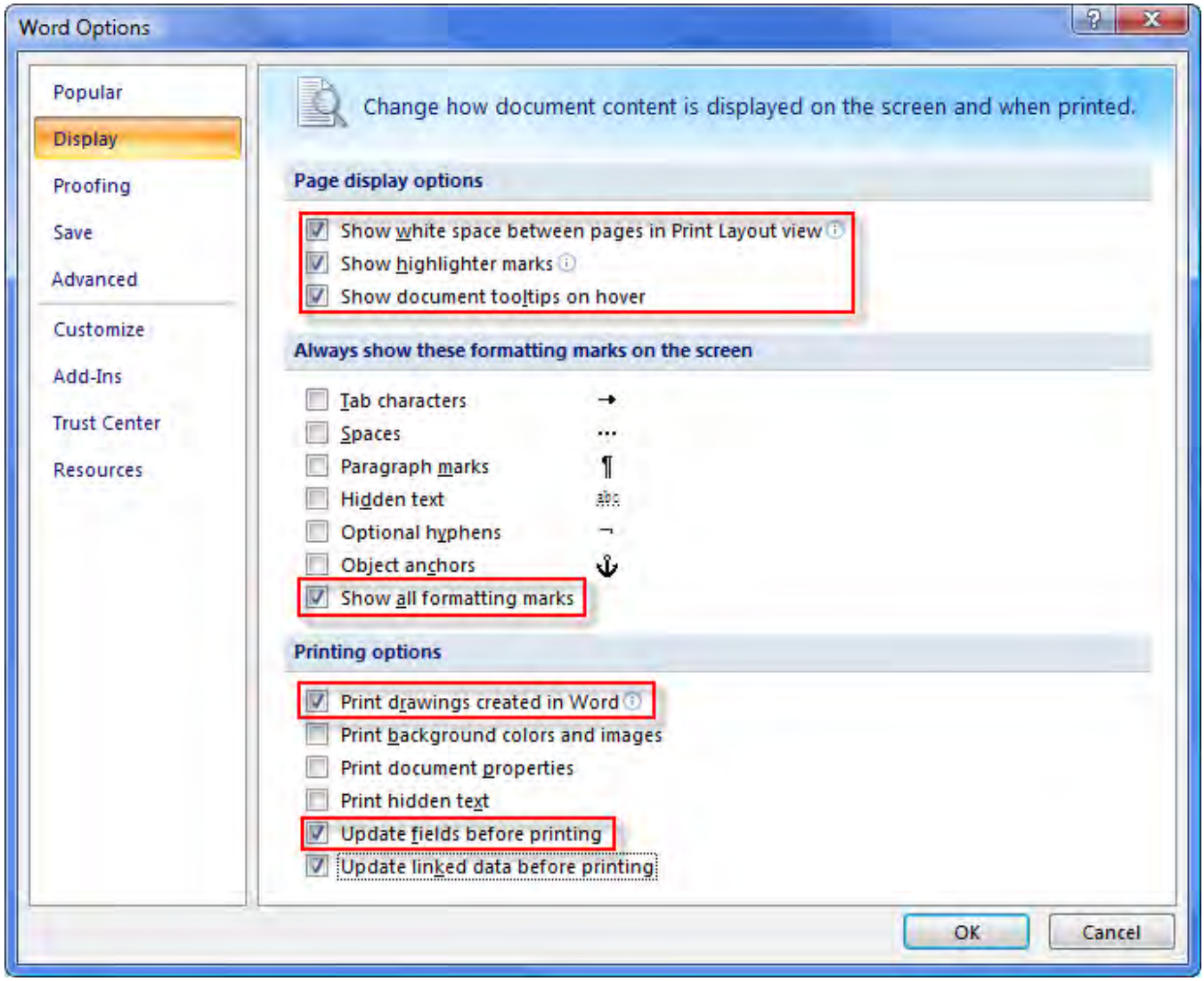


i. Uncheck Show Mini Toolbar on selection. This controls whether an additional pop up window with common font options is displayed whenever text is selected. This can be distracting and cover up part of the document. Therefore, uncheck this box.

ii. Check Enable Live Preview. This controls whether Word will temporarily change the appearance of the document to match the relevant style or theme when hovering the mouse over a style or theme. If this is too distracting, uncheck this box.

iii. Uncheck Open e-mail attachments…. This is an extremely annoying way to have all email attachments opened.

C. **Options ➔ Display**:



i. Check Show white space between pages in Print Layout view. Unchecking this box will hide the space between the pages, including the headers and footers between the pages.

ii. Check Show highlighter marks.

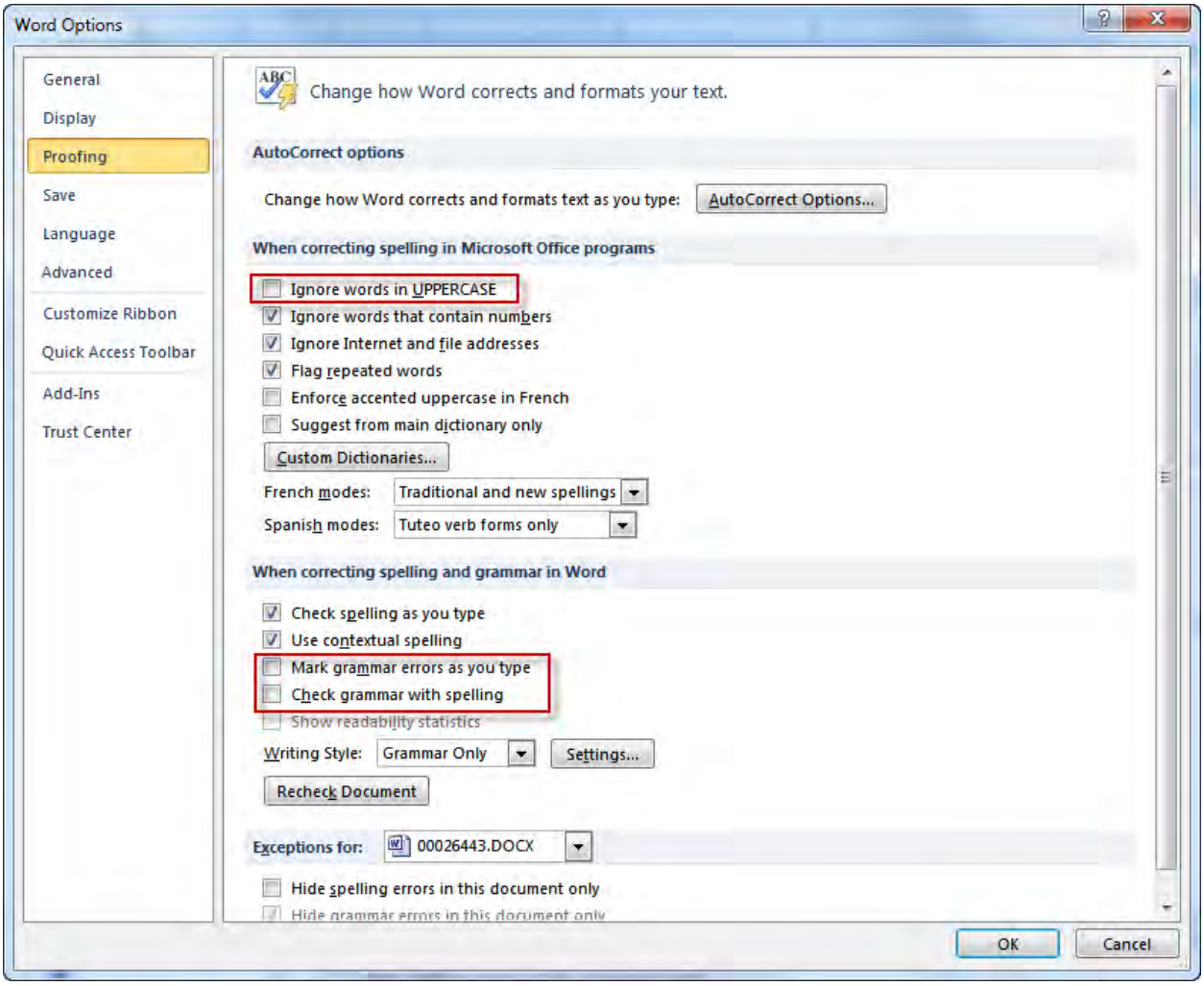
iii. Check Show document tooltips on hover.

iv. Check Show all formatting marks. To be able to see what is going on in the document, including any hidden text, check this option. The Show/Hide ¶ button on the ruler can then be used to show or hide the formatting marks.

v. Check Print drawings created in Word.

vi. Check Update fields before printing. Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.

D. **Options → Proofing**:

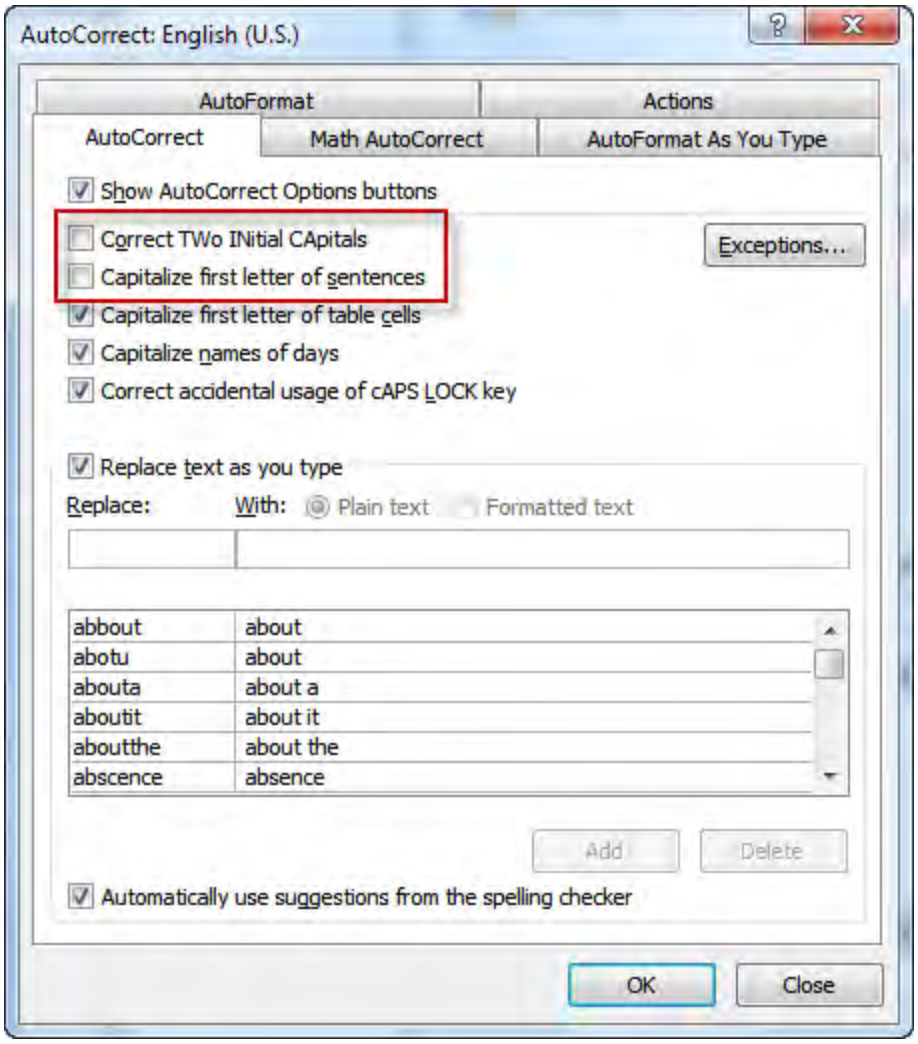


i. Uncheck Ignore words in UPPERCASE. Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.

ii. Uncheck Mark grammar errors as you type. This will eliminate the green squiggly lines in the document.

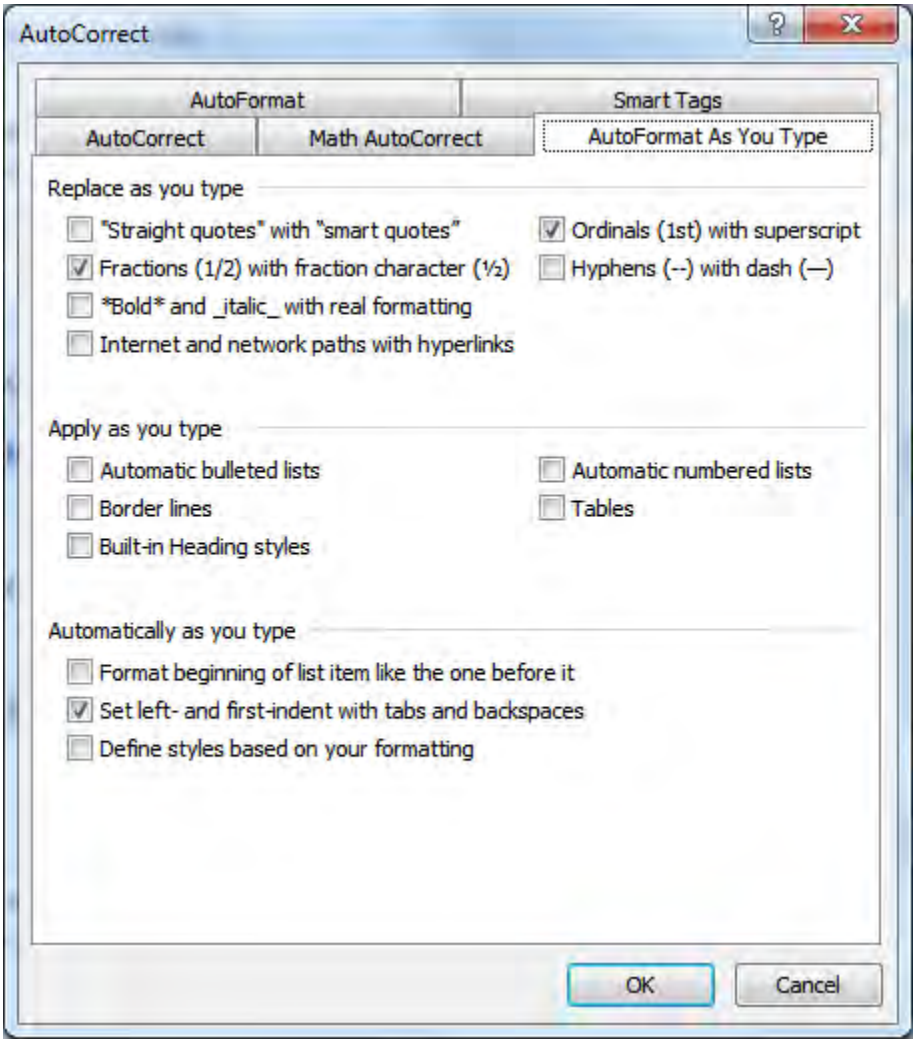
iii. Uncheck/Check Check grammar with spelling. Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

E. **Options ➔ Proofing ➔ Autocorrect Button**: Next, go to Proofing and click on Autocorrect Options button. This will launch the Autocorrect Options dialog.



Uncheck Capitalize first letter of sentences and Capitalize first letter of table cells. You may also want to uncheck the Automatically use suggestions from the spelling checker. This option will cause Word to try to identify every word that is typed. If the word is not recognized, Word will "guess" the closest word from its spell checker and replace the typed word with its best guess.

Next click on the Autoformat As You Type tab.



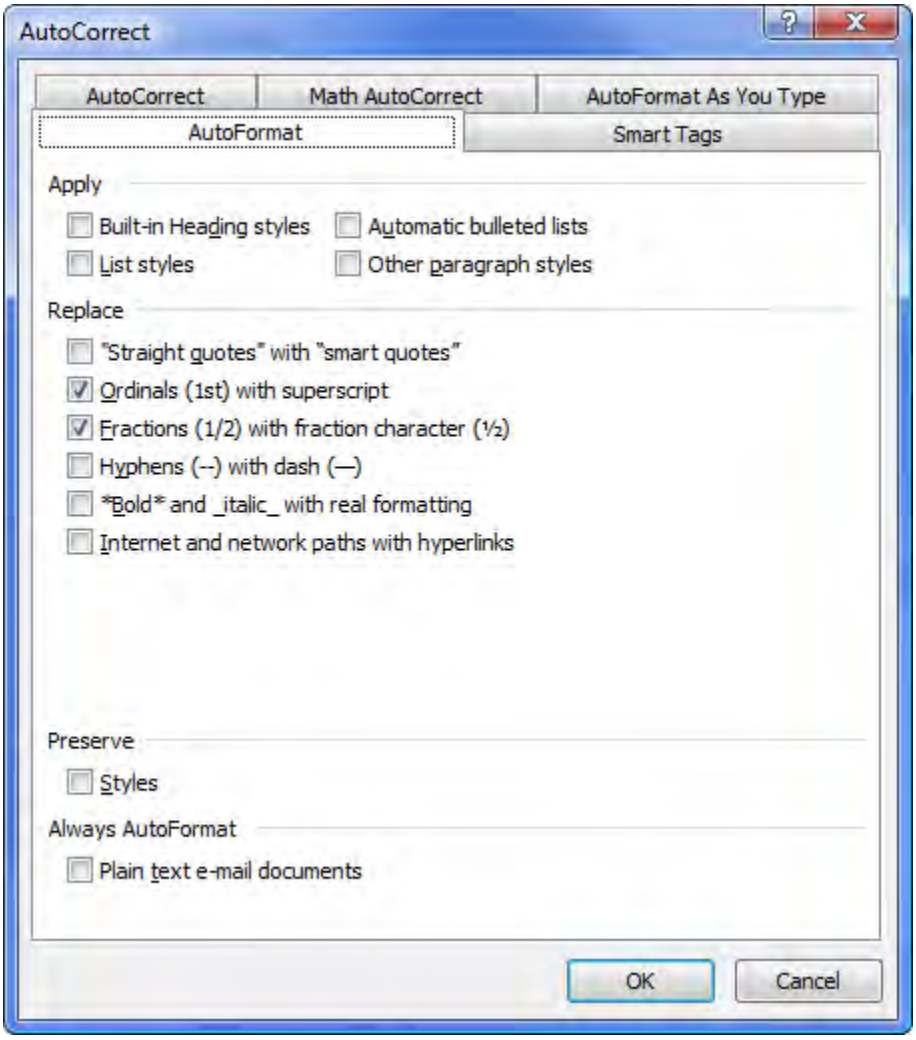
Under Replace as type, uncheck: *Bold and _italic_ with real formatting and Hyphens (--) with dash (-). Check: Fraction (1/2) with fraction character (1/2) and Ordinals (1st with superscript). You may want to check Internet and network paths with hyperlinks. This will create clickable hyperlinks to internet addresses, so that a person opening the document can click on the link and go to the web address right from the document. You might also check the Straight quotes with smart quotes but keep in mind that this may result in your quotation marks getting converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

Uncheck everything under Apply as you type. The Apply as you type section causes Word to guess what is being typed and start inserting bulleted lists and tables on its own without any prompting to do so.

Under Automatically as you type, uncheck: Format beginning of list item like the one before it and Define styles based on your formatting. Define styles based on your

formatting causes Word to create styles on its own. Check Set left- and first-indent with tabs and backspaces.

Finally, click on the AutoFormat tab.



Uncheck everything under Apply, Preserve, and Always AutoFormat.

Under Replace, uncheck:

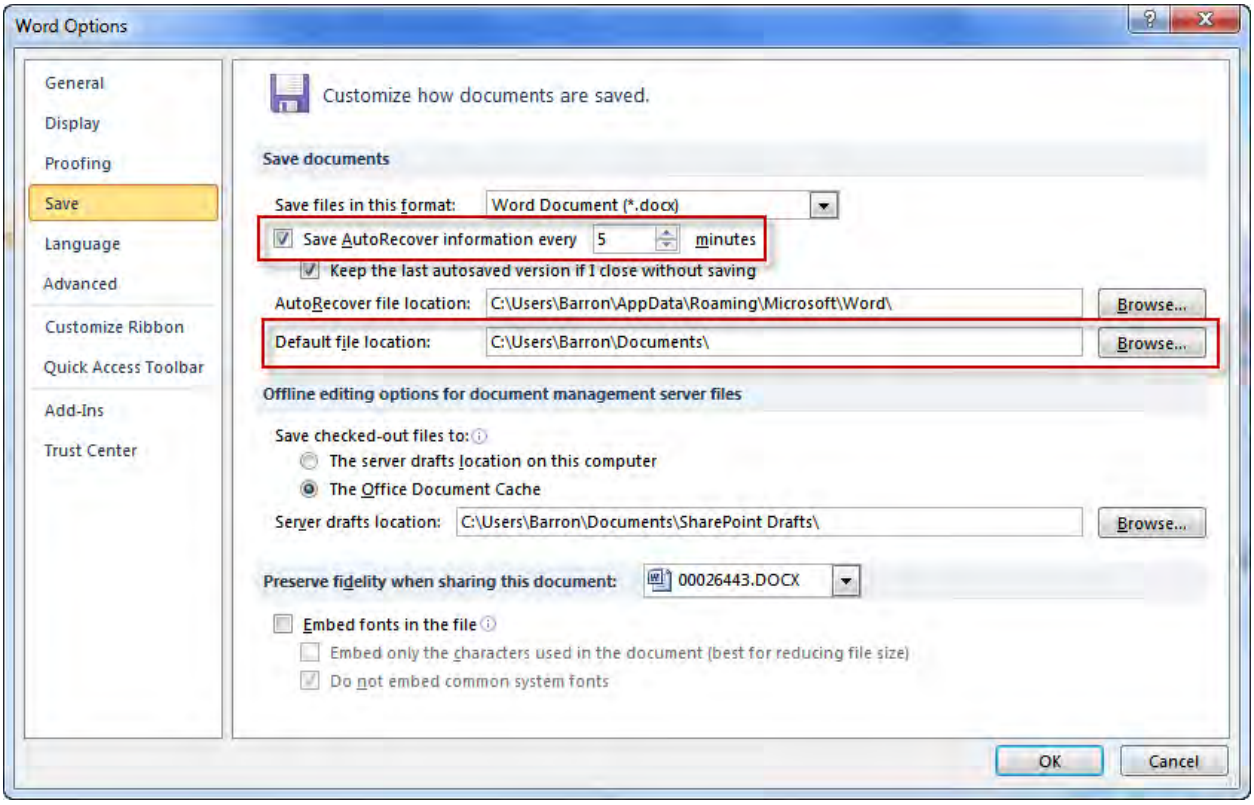
- "Straight quotes" with "smart quotes"
- Hyphens (--) with dash (-)
- *Bold and _italic_ with real formatting
- Internet and network paths with hyperlinks

Under Replace, check:

- Check Ordinals (1st) with superscript
- Fractions (1/2) with fraction character (1/2).

At this point, make sure to click the OK button or all of the changes will be lost.

F. **Options ➔ Save**:

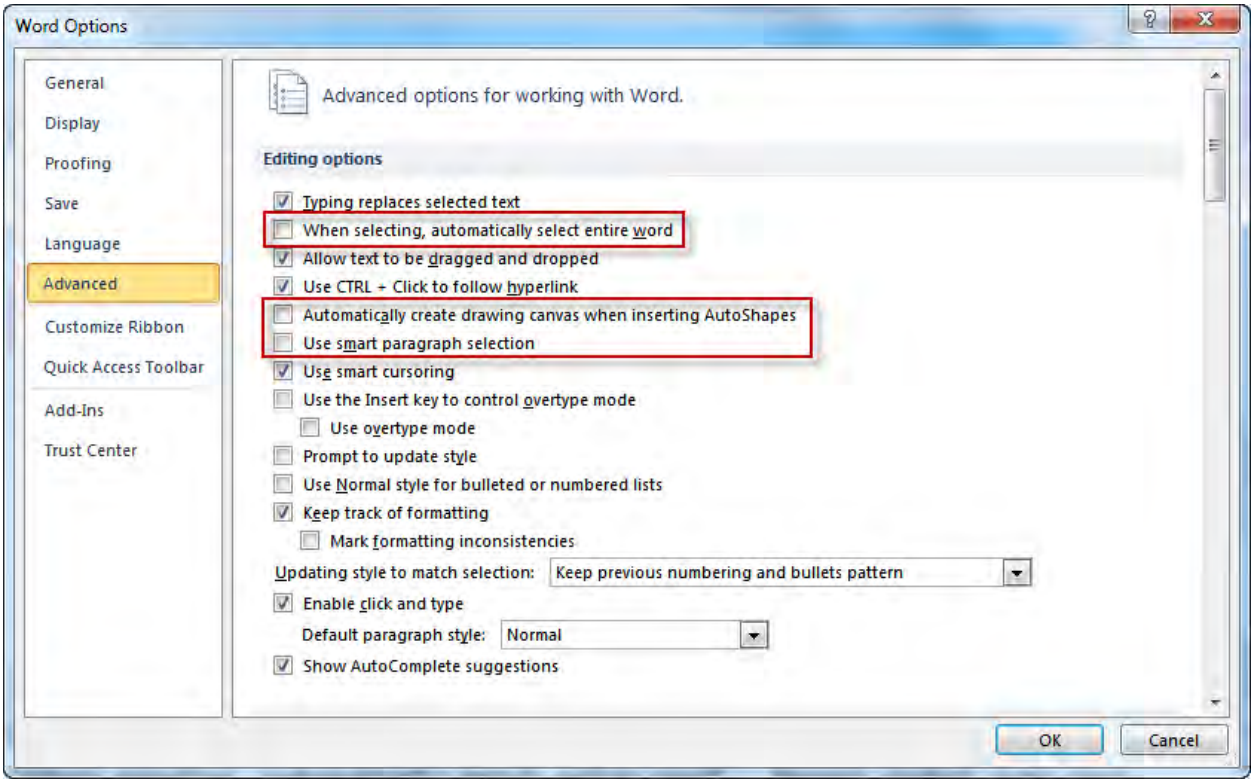


i. Change Save files in this format depending on your circumstances. If you anticipate regularly sharing documents with Word 2003 users, then you will want to change this option from Word Document (*.docx) to Word 97-2003 Document (*.doc). However, if you save a document to be compatible with Word 2003, you will lose Word 2007 specific features in the document.

ii. Change Save AutoRecover information every option to 5 minutes. Be sure this check box is checked.

iii. Change the Default file location to your default file location.

G. **Options ➔ Advanced ➔ Editing Options**:



i. Uncheck When selecting, automatically select entire word. Regain control over your mouse.

ii. Uncheck Automatically create drawing canvas when inserting AutoShapes.

iii. Uncheck Use smart paragraph selection.

Some other items to watch out for are:

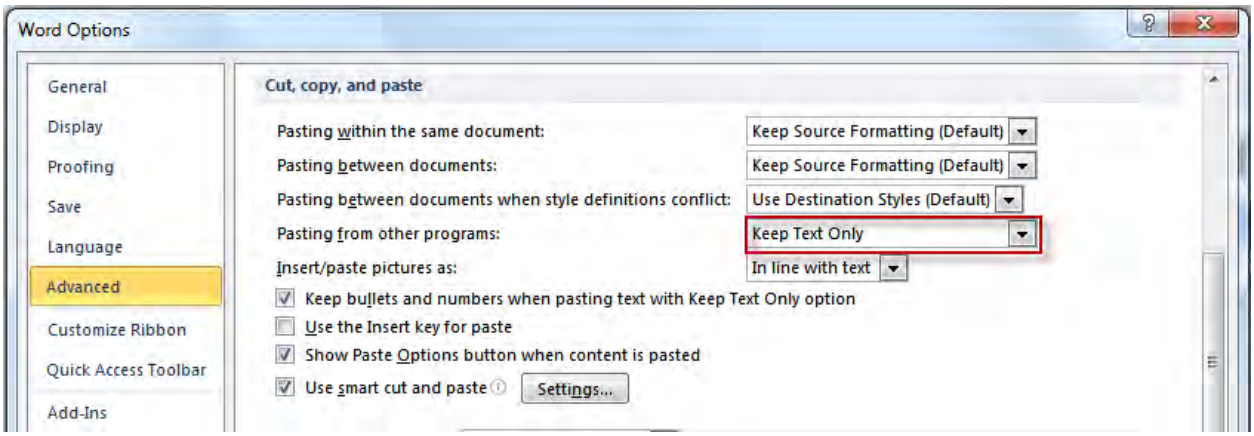
iv. Make sure Typing replaces selected text is checked. If not, you will not be able to overtype on top of a selected word

v. Use smart cursoring moves the cursor when you scroll up or down through the document, this may or may not be what you want

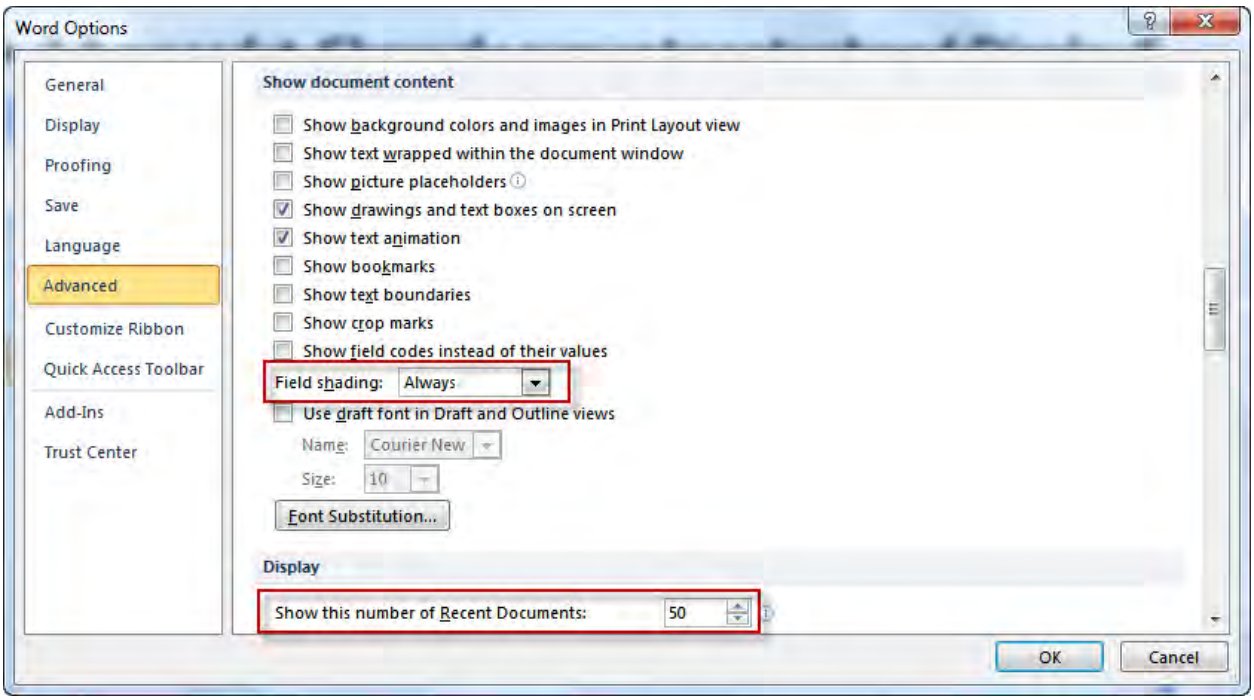
vi. Enable click and type, in print layout, will format itself to place the text where you double click.

H. **Options ➔ Advanced ➔Cut, Copy and Paste**: Note that in this area you can control the default paste action in a variety of circumstances. When copying from other programs (such as a browser), we recommend that you strip all formatting off of the source text. By changing Pasting from other programs to Keep Text Only, this will always be the case.

You may want to change some of the other settings as well depending upon how you work.



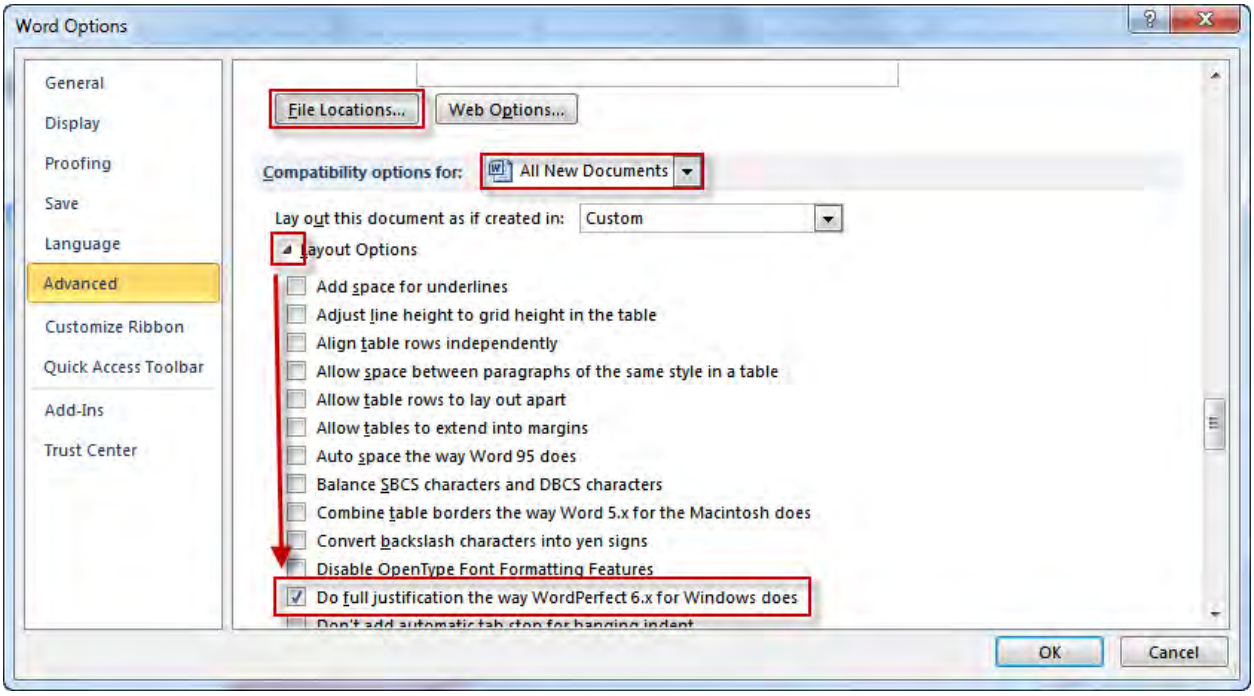
I. **Options ➔ Advanced ➔ Show Document Content and Display**:



i. Change Field shading to Always.

ii. Change Show this number of Recent Documents to your preference.

J. **Options ➔ Advanced ➔ General and Compatibility Options**:

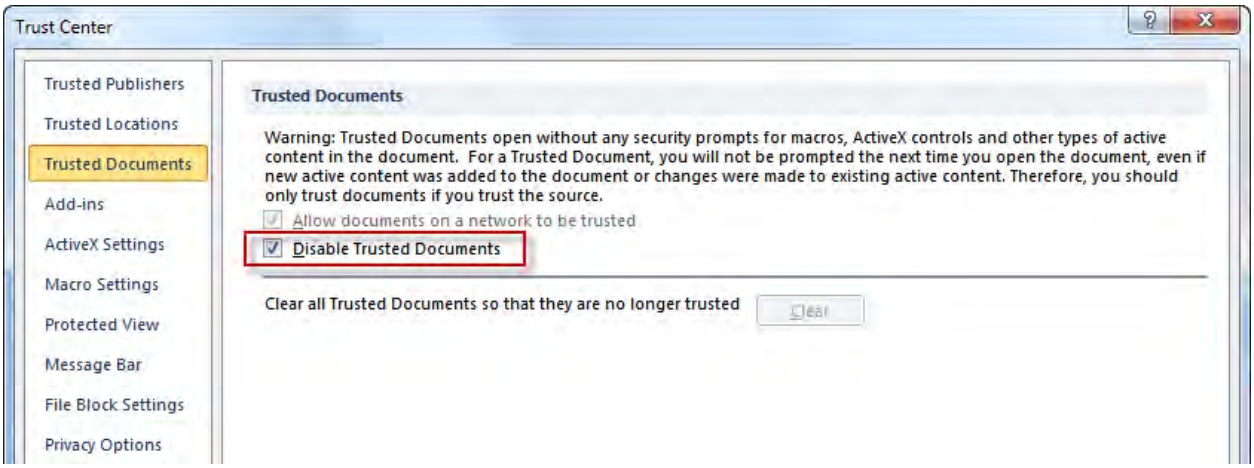


i. Click on File Locations…. if you need to change the default directory for templates, etc. Make sure the compatibility options is for "All New Documents" is set for Microsoft Office Word 2010. This option (and several others) allow you to set options for this one particular document, or for "All new documents". Setting this option for "All New Documents" actually changes your Normal.dotm template.

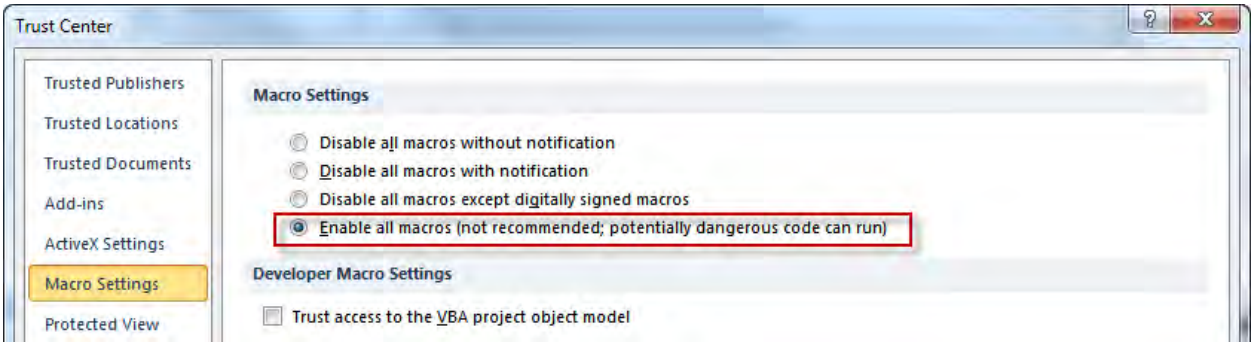
ii. Do full justification the way WordPerfect 6.x for Windows does: If text using Word's full justification looks too spread out, try changing the "Layout Options" and select "Do full justification the way Wordperfect 6.x for Windows does". NOTE: Make sure you change the selection for Compatibility options for to All New Documents before you click OK.

K. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Trusted Documents**: This is another safety feature we find annoying. So be advised that disabling it entails a security risk. However, we recommend disabling the trusted documents feature. To do so, click

on Trust Center and click on the Trust Center Settings… button. Go to Trusted Documents and check Disable Trusted Documents.

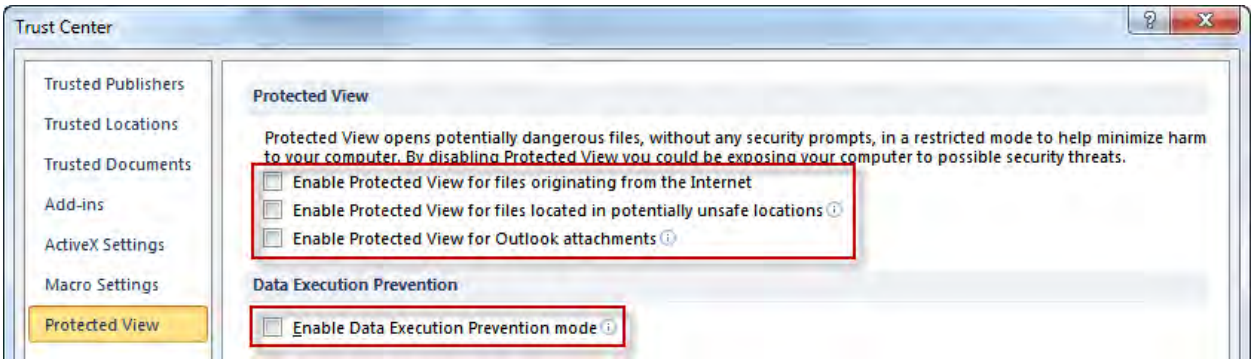


L. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Macro Settings**: Again, this recommendation is a security risk, but there are a lot of Word add-ins which require macros to run (HotDocs, for example). If you have antivirus software, it will detect and remove macro viruses which is the risk this setting is protecting against. To enable all macros to run, click on the Macro Settings, then Enable all macros (not recommended; potentially dangerous code can run).

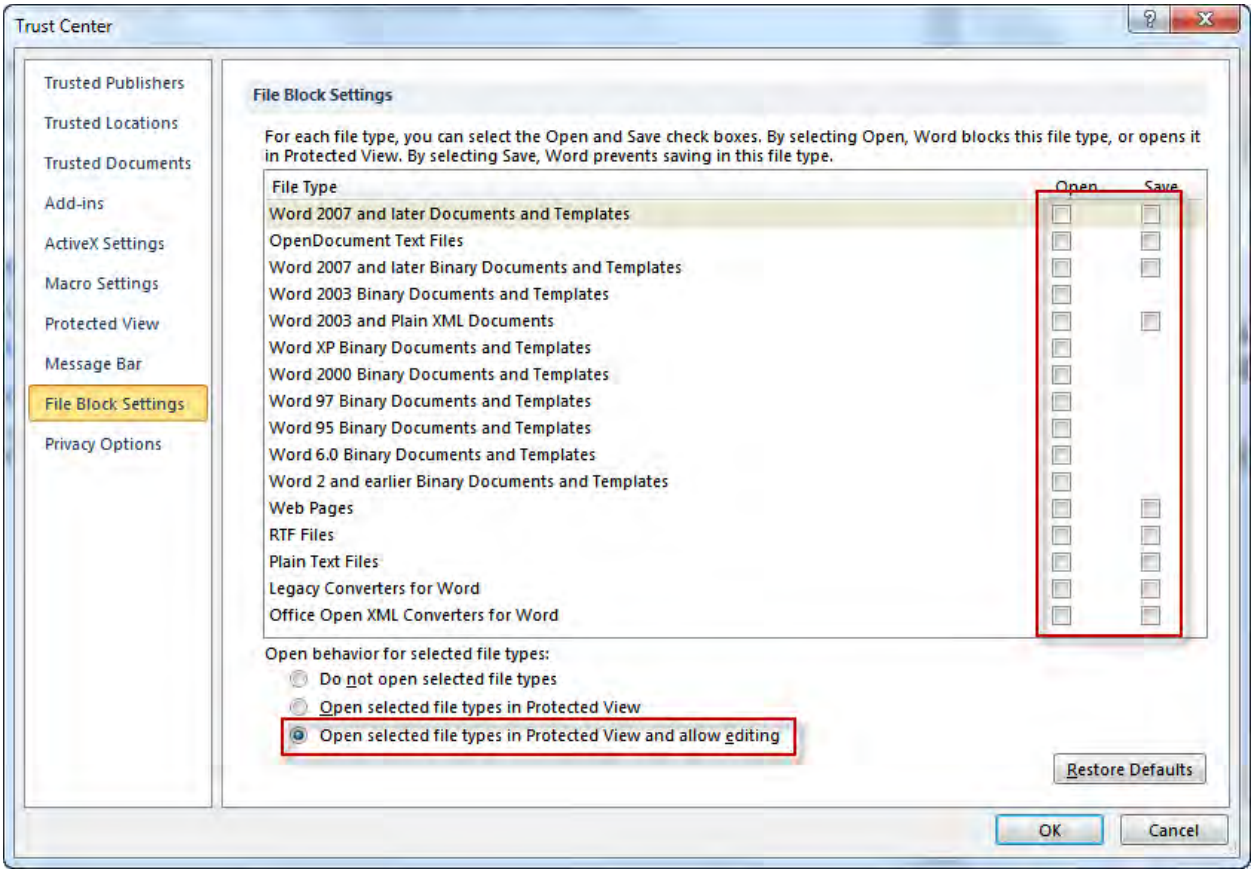


M. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Protected View**: Yes, another annoying prophylactic setting in Word 2010. This one is really bad and has caused an incredible number of tech support calls to our office. Yes, there is risk involved in disabling

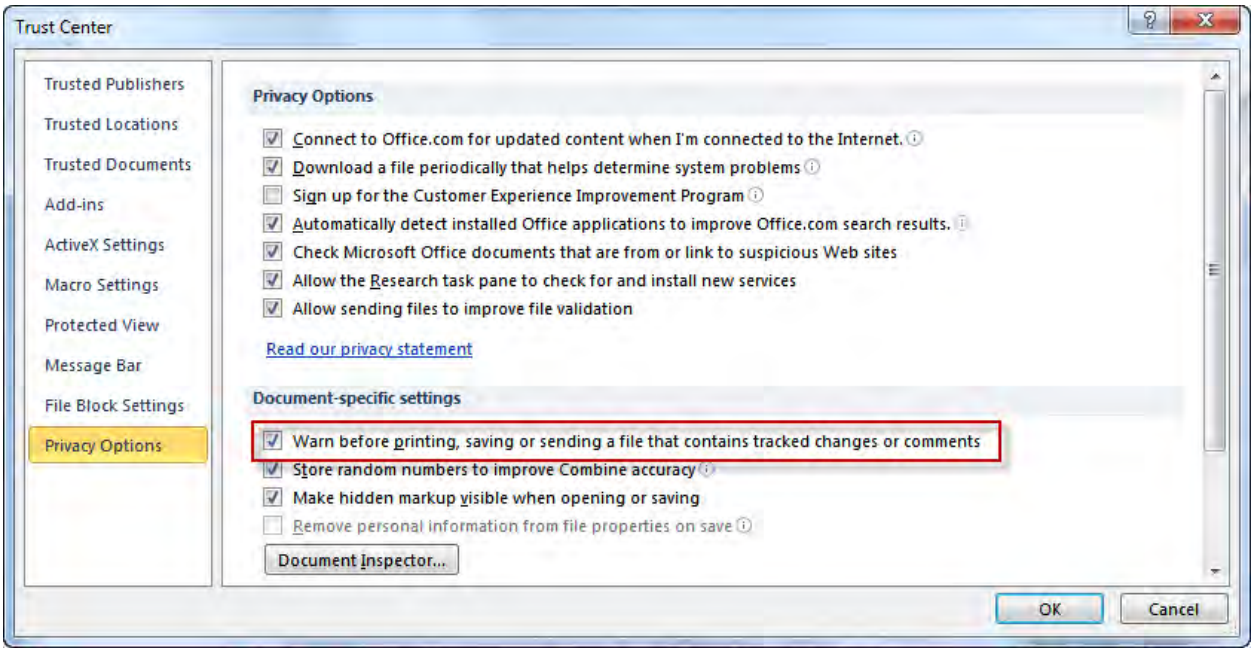
it. However, it causes more problems than it prevents. To change these settings, go to Protected View and uncheck all of the boxes.



N. **Options → Trust Center → Trust Center Settings Button → File Block Settings**: Yes, another prophylactic feature we don't like. When I double click a file, I want it to OPEN and not give me a non-editable version of it. Again, there is risk involved in disabling this feature. To have all file types open and allow editing without a prompt, under the File Block Settings, uncheck all of the check boxes and under Open behavior for selected filed types, select Open selected file types in Protected View and allow editing.



O. **Options → Trust Center → Trust Center Settings Button → Privacy Options**: To be warned before printing, saving or sending a file that contains tracked changes or comments (things that you may not want others to see), under Privacy Options, check Warn before printing saving or sending a file that contains tracked changes or comments.



Click OK to exit the Trust Center dialog and save all of your changes.

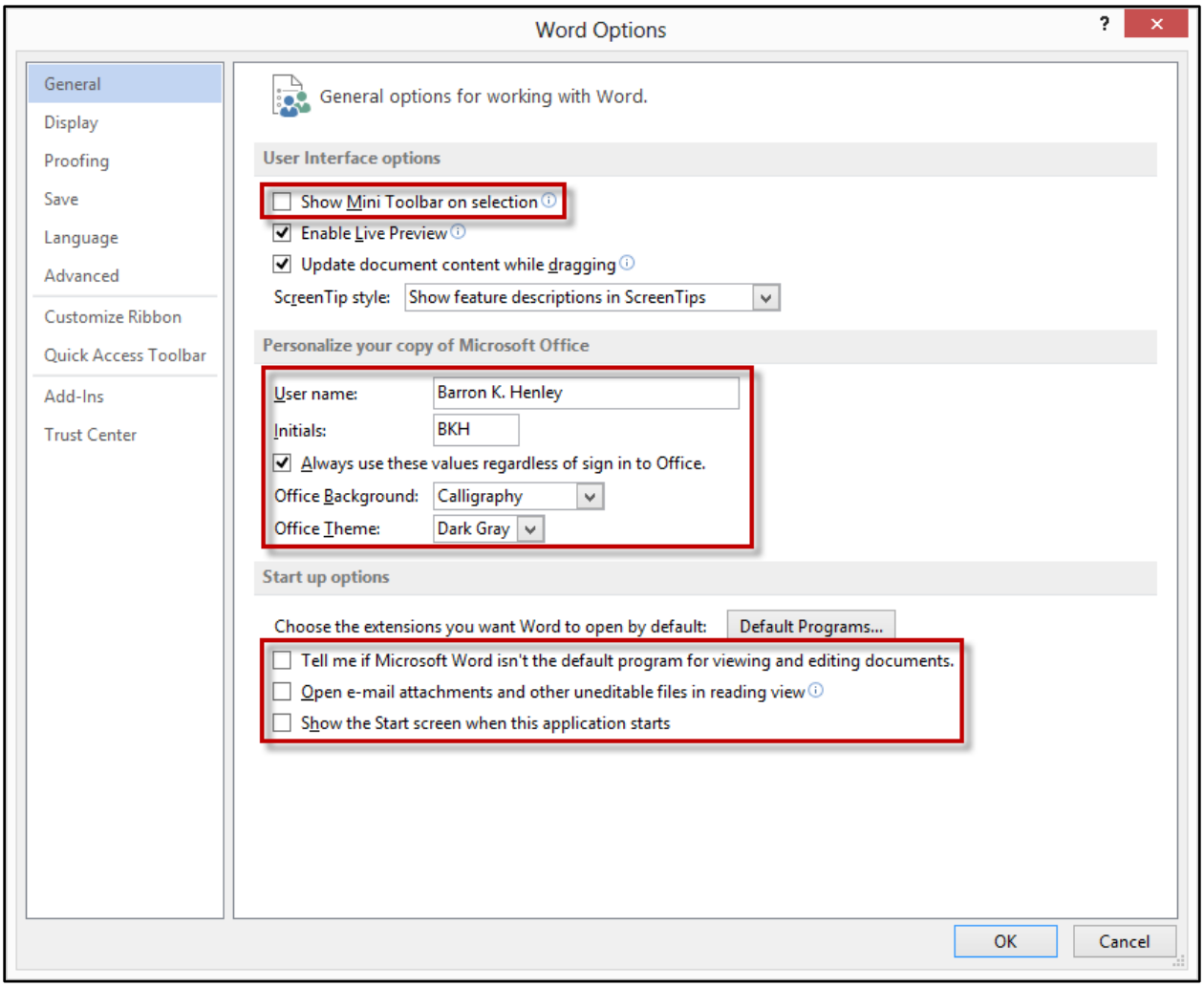
Click OK to exit the Word Options dialog and save all of your changes.

2. Default Setting Changes for Word 2013:

A. **In General**: The default setting changes for Word 2013 are very different from 2010 so follow these steps if you're using Word 2013.

NOTE that you get to all of the following screens by clicking the **File menu → Options**.

B. **Options ➔ General**:



i. Uncheck **Show Mini Toolbar on selection**. This controls whether an additional pop up window with common font options is displayed whenever text is selected. This can be distracting and cover up part of the document. Therefore, uncheck this box.

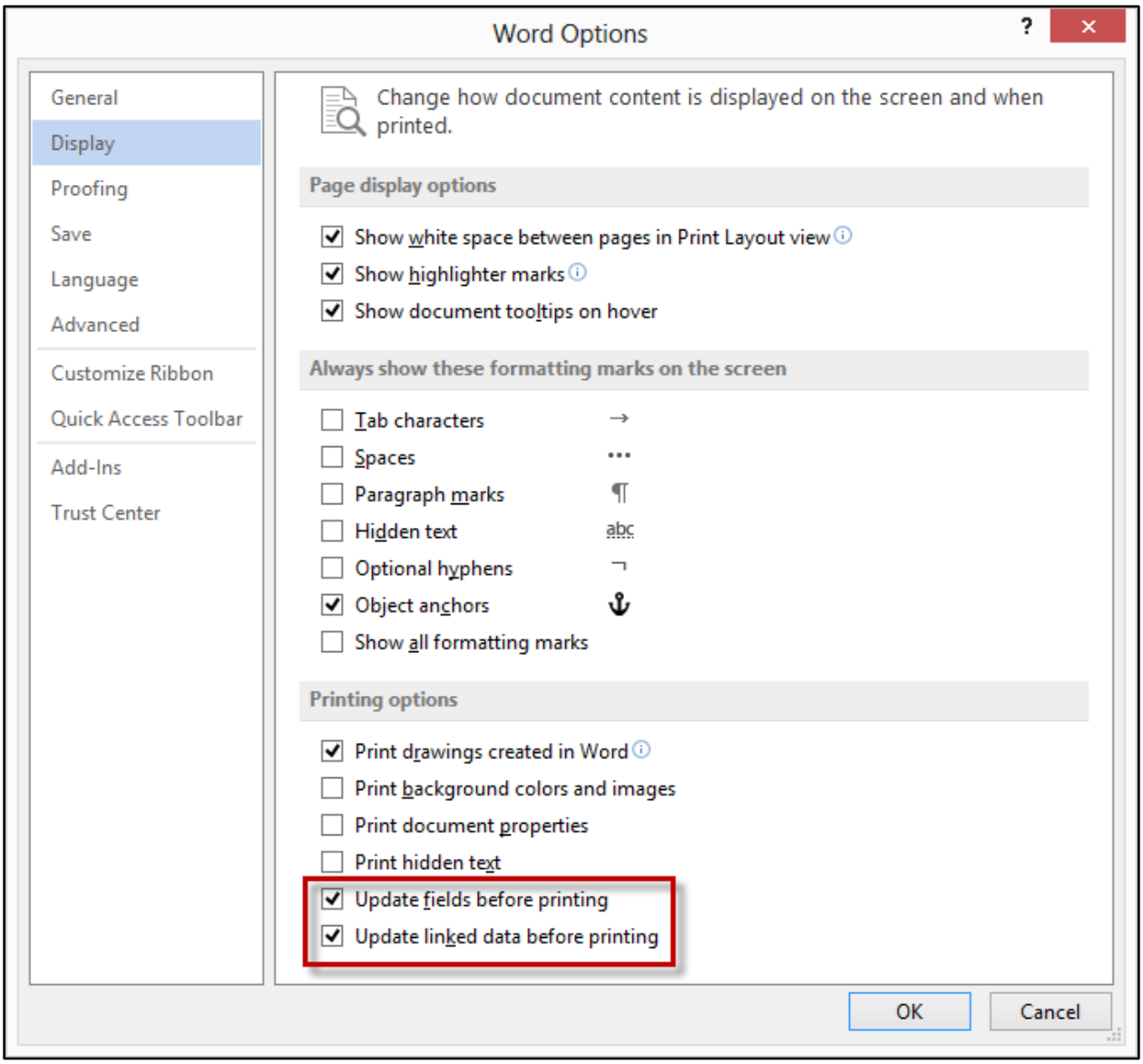
ii. Personalization: Make sure your name and initials are in the **User name** and **Initials boxes**. Check **Always use these values…** and choose an **Office Background** and **Office Theme**. The background is the frankly silly graphic that appears at the top, right-hand corner of the Word screen. You had a chance to choose something during installation but you may want to change it now that you've seen it. The default Office Theme of stark, blinding white might not be what you would like. I recommend you change it to light or dark gray.

iii. **Tell me if Word isn't default program for viewing and editing documents**: This is just annoying, particularly if you just don't want Word 2013 to be your default.

iv. **Open e-mail attachments in Reading View**: Clear this so attachments open normally.

v. **Get Rid of the Start Screen**. This is the giant template selection screen that opens whenever you open Word 2013. If you want Word 2013 to behave like prior versions when you run it, then you definitely want to clear the **Show the Start Screen when this application starts** box.

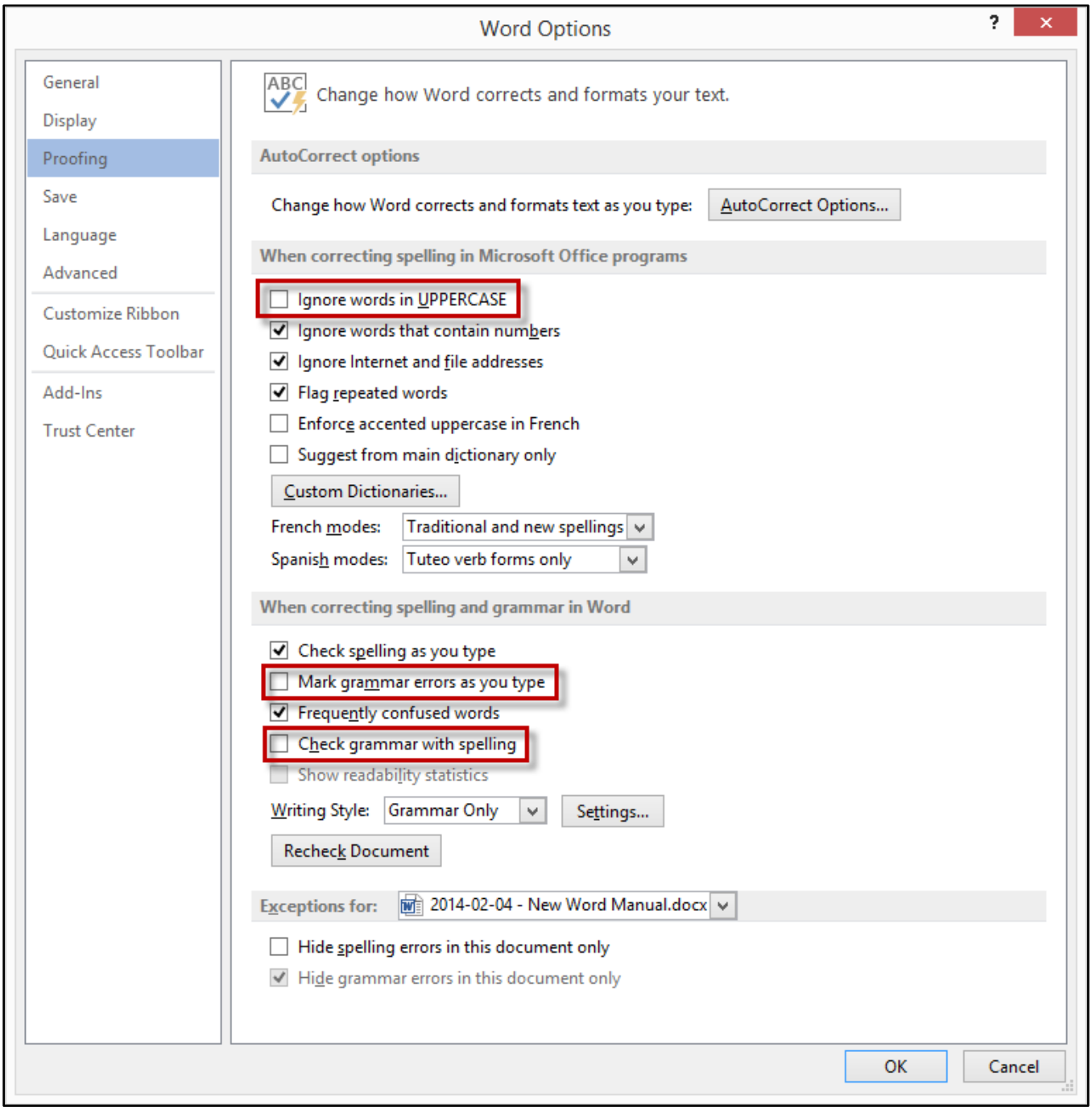
C. **Options → Display**:



i. Check **Update fields before printing**. Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.

ii. Check **Update linked data before printing**. This will make sure that all linked files are updated before printing.

D. **Options ➔ Proofing**:

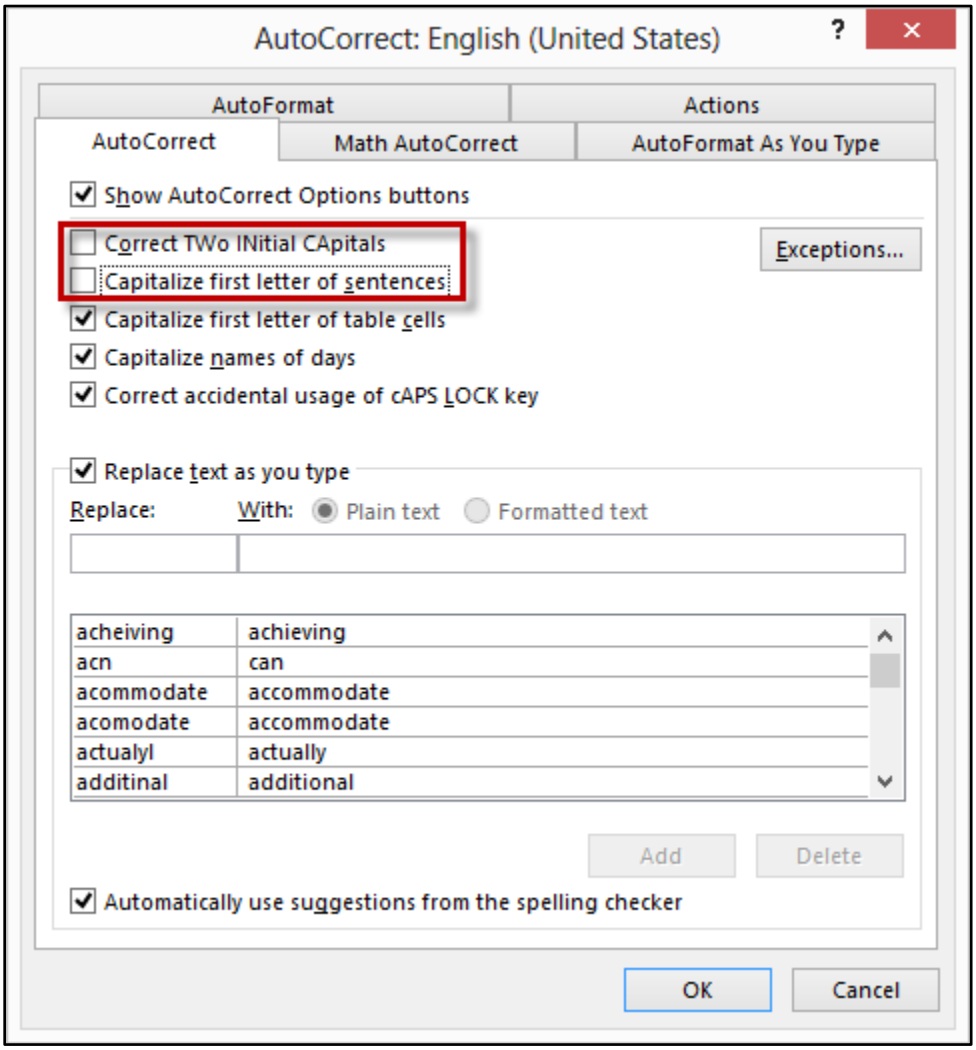


i. Uncheck **Ignore words in UPPERCASE**. Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.

ii. Uncheck **Mark grammar errors as you type**. This will eliminate the green squiggly lines in the document.

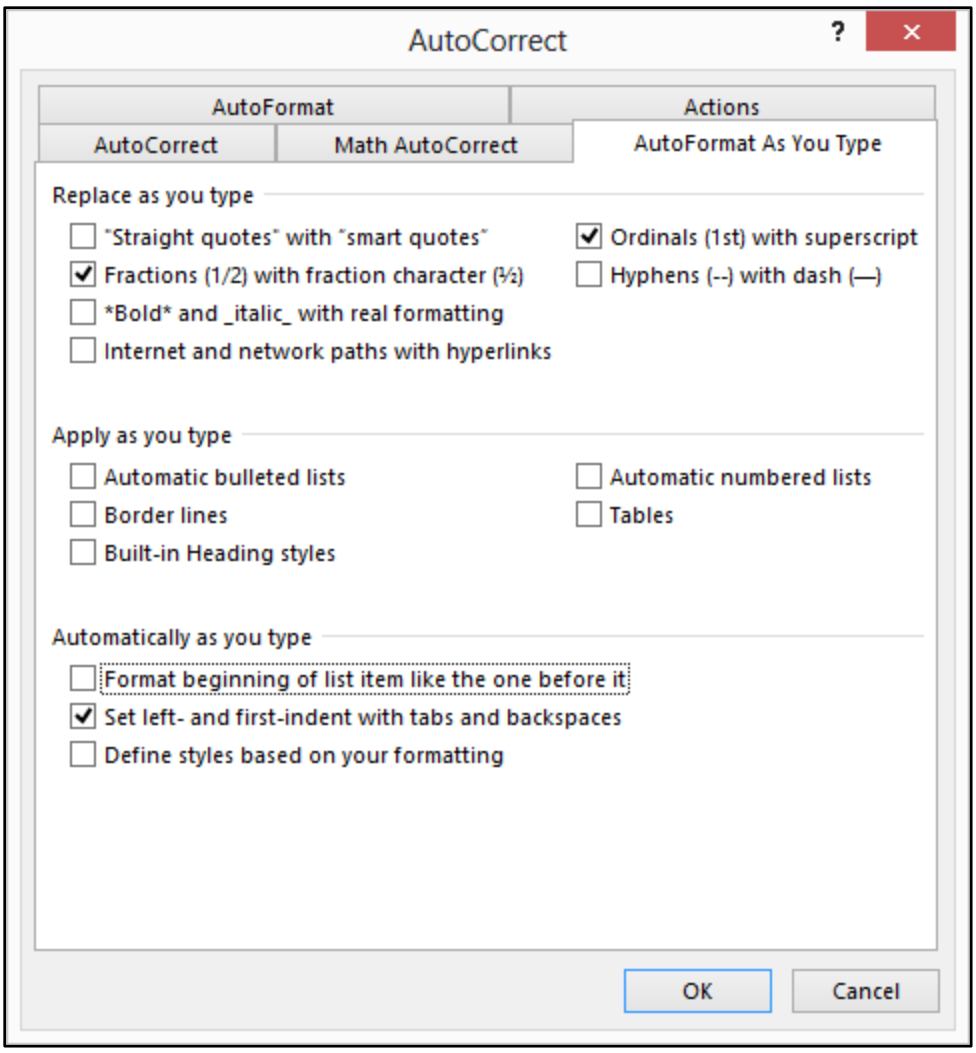
iii. Uncheck/Check **grammar with spelling**. Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

E. **Options ➔ Proofing and Autocorrect**: Next, go to **Proofing** and click on **Autocorrect Options** button. This will launch the **Autocorrect Options dialog**.



i. Uncheck **Correct TWo INitial CApitals** and **Capitalize first letter of sentences** as most people find that annoying because they MEANT to do it (IDs or cc:). **Note**: you can also delete the AutoCorrect entries in the list at the bottom of the dialog which replaces (c) with © and (r) with ®.

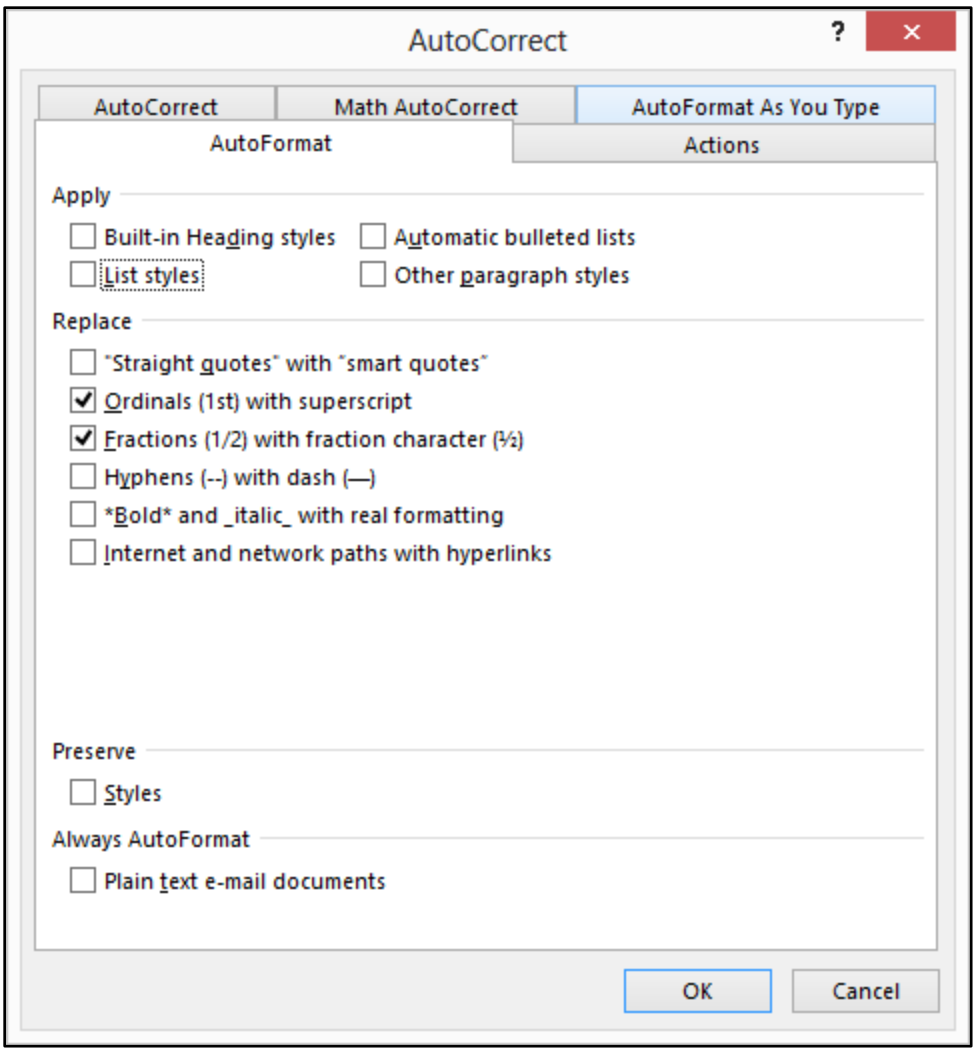
ii. Next click on the **AutoFormat As You Type** tab.



iii. Uncheck everything except **Ordinals**, **Fractions** and **Set left and first indent with tabs and backspaces**. Optional items include checking **Internet and network paths with hyperlinks** will create clickable hyperlinks to internet addresses, so that a person opening the document can click on the link and go to the web address right from the document. You might also check the **Straight quotes with smart quotes** but keep in mind that this may result in your quotation marks getting converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

iv. Be sure to uncheck everything else of this page!! The **Apply as you type section** causes Word to guess what is being typed and start inserting bulleted lists and tables on its own without any prompting to do so. Also be sure to uncheck **Define styles based on your formatting**. This option causes Word to create styles on its own.

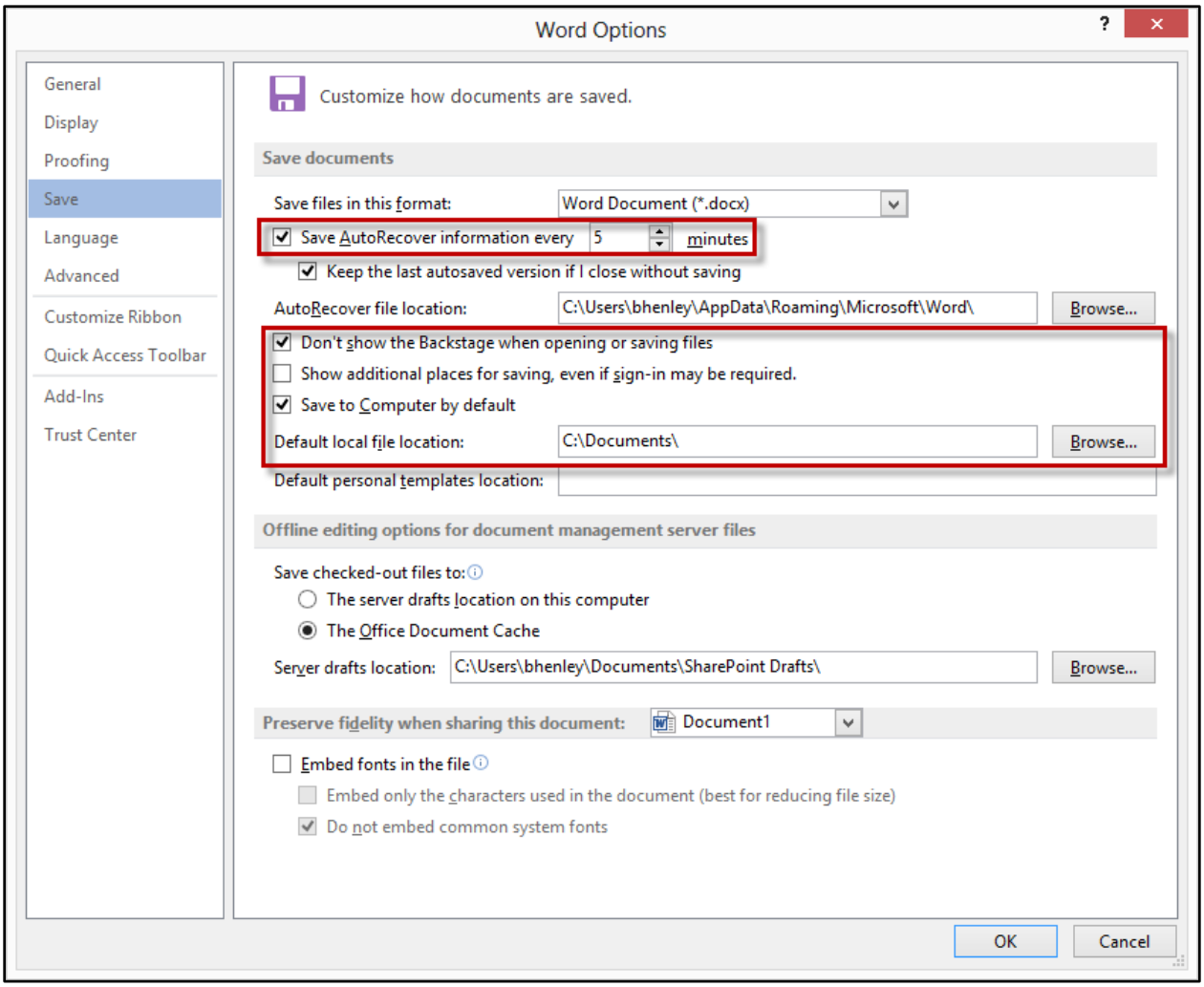
v. Finally, click on the **AutoFormat tab**.



vi. Make these options match the **AutoFormat As You Type options**.

vii. At this point, make sure to click the **OK** button or all of the changes will be lost.

F. **Options ➔ Save**:



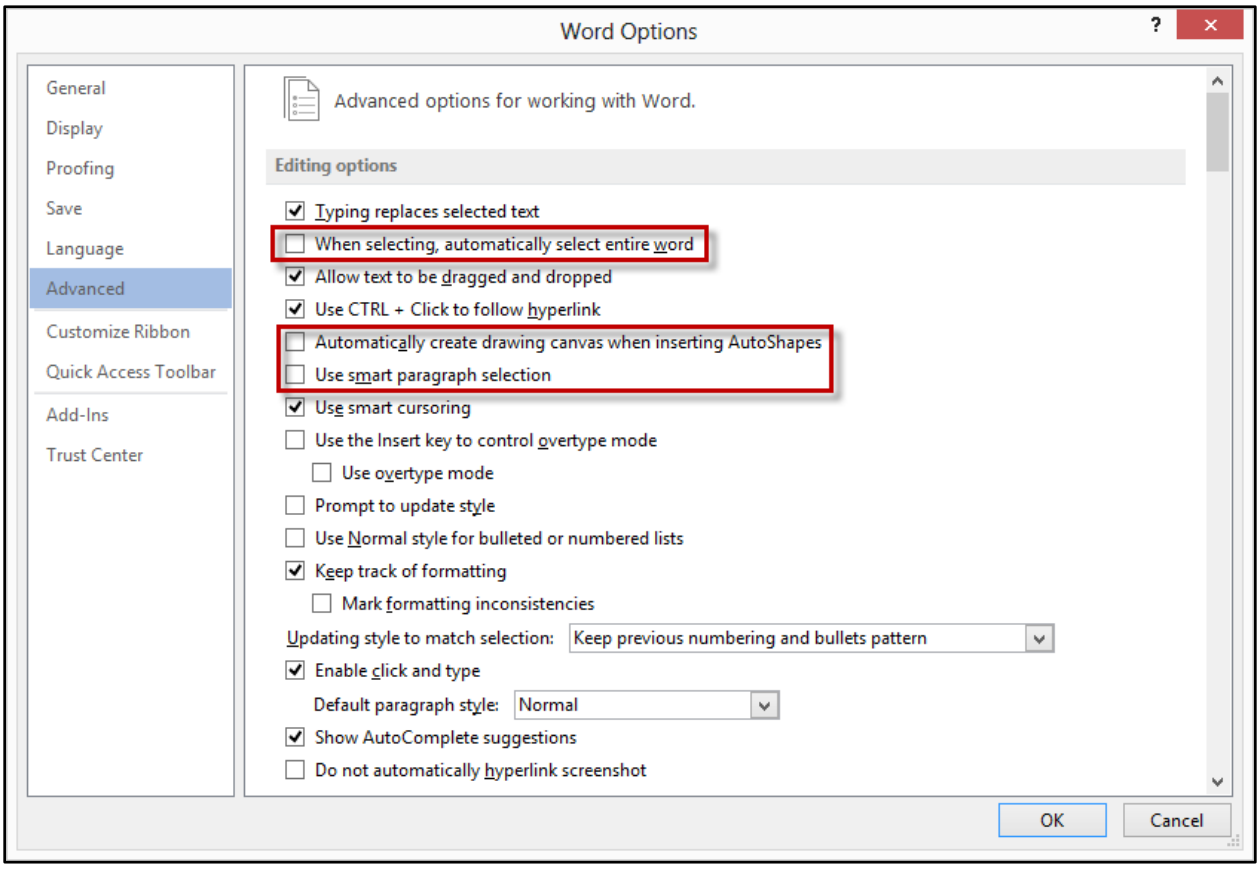
i. **Save AutoRecover information**: Reduce this to **5 minutes** rather than 10 minutes. More frequency is a good thing.

ii. **Don't show the Backstage when opening or saving files**: If you want Word 2013 to behave like its predecessors when you open or save a file, then check this box.

iii. **Show additional places for saving, even if sign-in may be required**: This is just a waste of space on your save screen, so clear this box.

iv. **Save to Computer by default**: Microsoft really wants you to save everything to OneDrive and you probably don't want to. Therefore, check this box.

G. **Options ➔ Advanced ➔ Editing Options**:



i. Uncheck **When selecting, automatically select entire word.** Regain control over your mouse.

ii. Uncheck A**utomatically create drawing canvas when inserting AutoShapes**.

iii. Uncheck **Use smart paragraph selection**.

iv. Some other items to watch out for are:

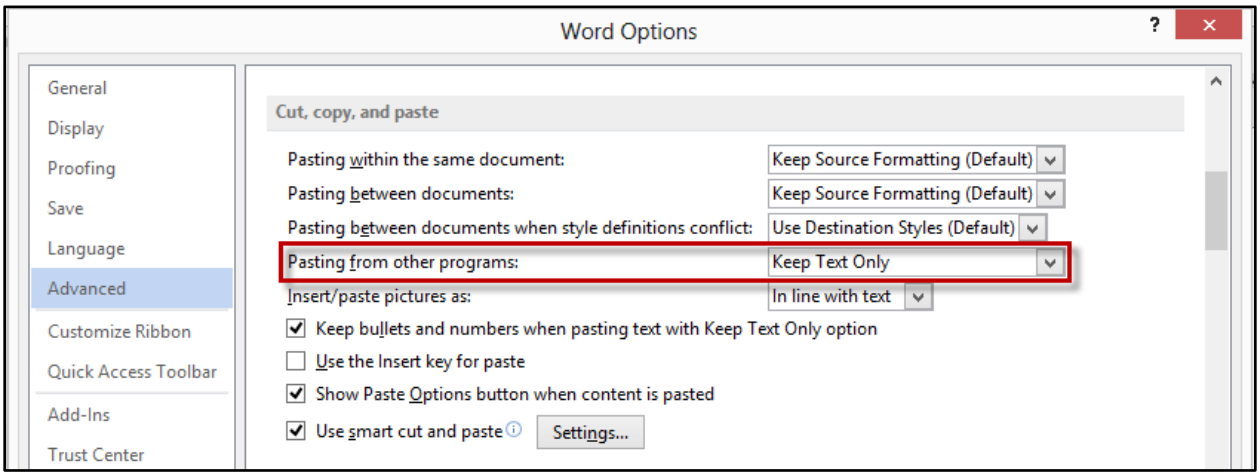
v. Make sure **Typing replaces selected text** is checked. If not, you will not be able to overtype on top of a selected word

vi. **Use smart cursoring** moves the cursor when you scroll up or down through the document, this may or may not be what you want

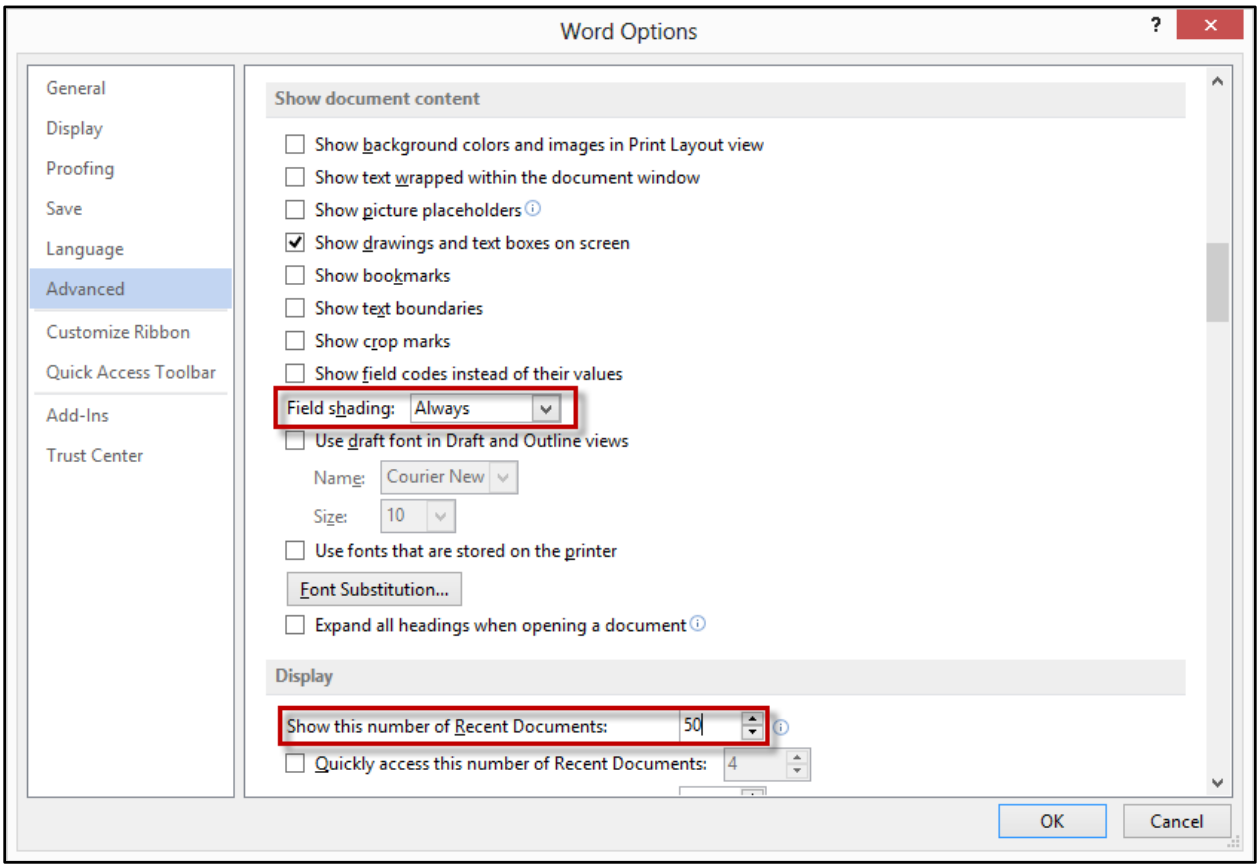
vii. **Enable click and type,** in print layout, will format itself to place the text where you double click.

H. **Options ➔ Advanced ➔Cut, Copy and Paste**: Note that in this area you can control the default paste action in a variety of circumstances. When copying from other programs

(such as a browser), we recommend that you strip all formatting off of the source text. By changing the setting shown below, this will always be the case. You may want to change some of the other settings as well depending upon how you work.



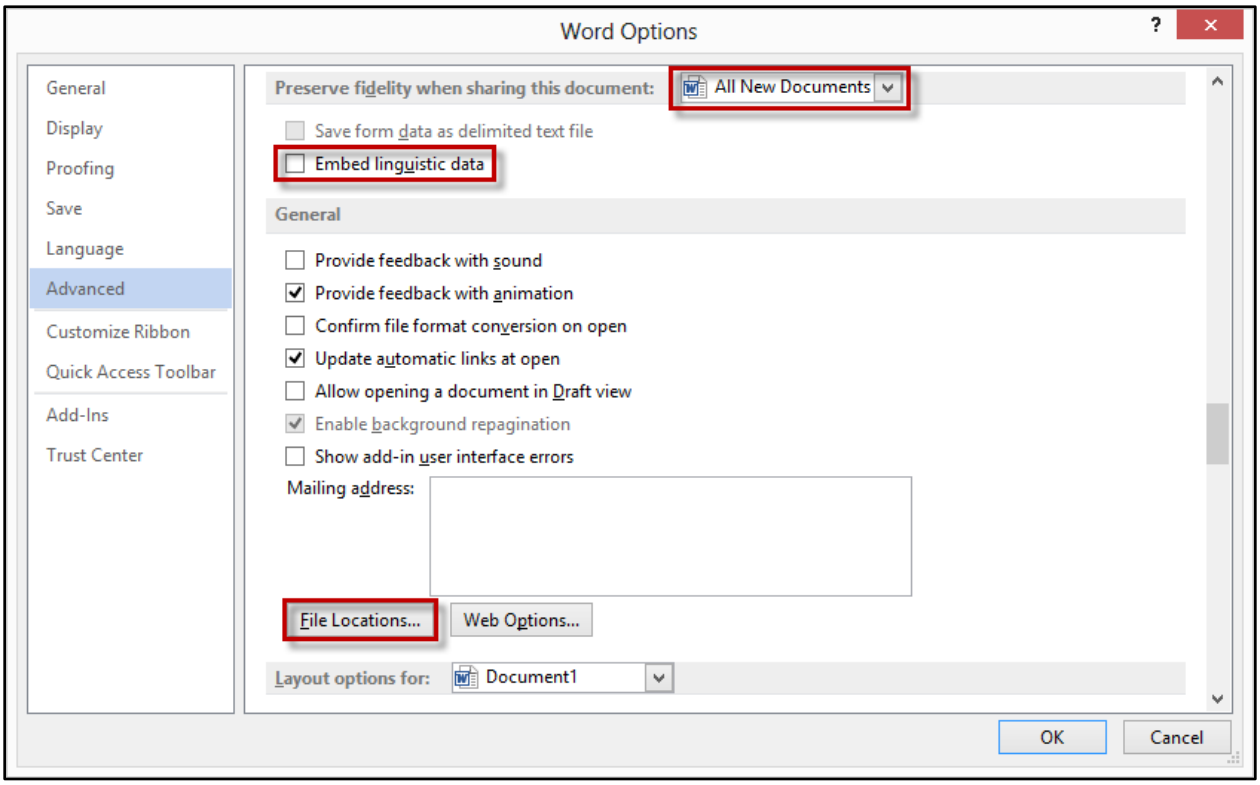
I. **Options ➔ Advanced ➔ Show Document Content**:



i. Change **Field shading** to **Always**.

ii. Change **Show this number of Recent Documents** to your preference.

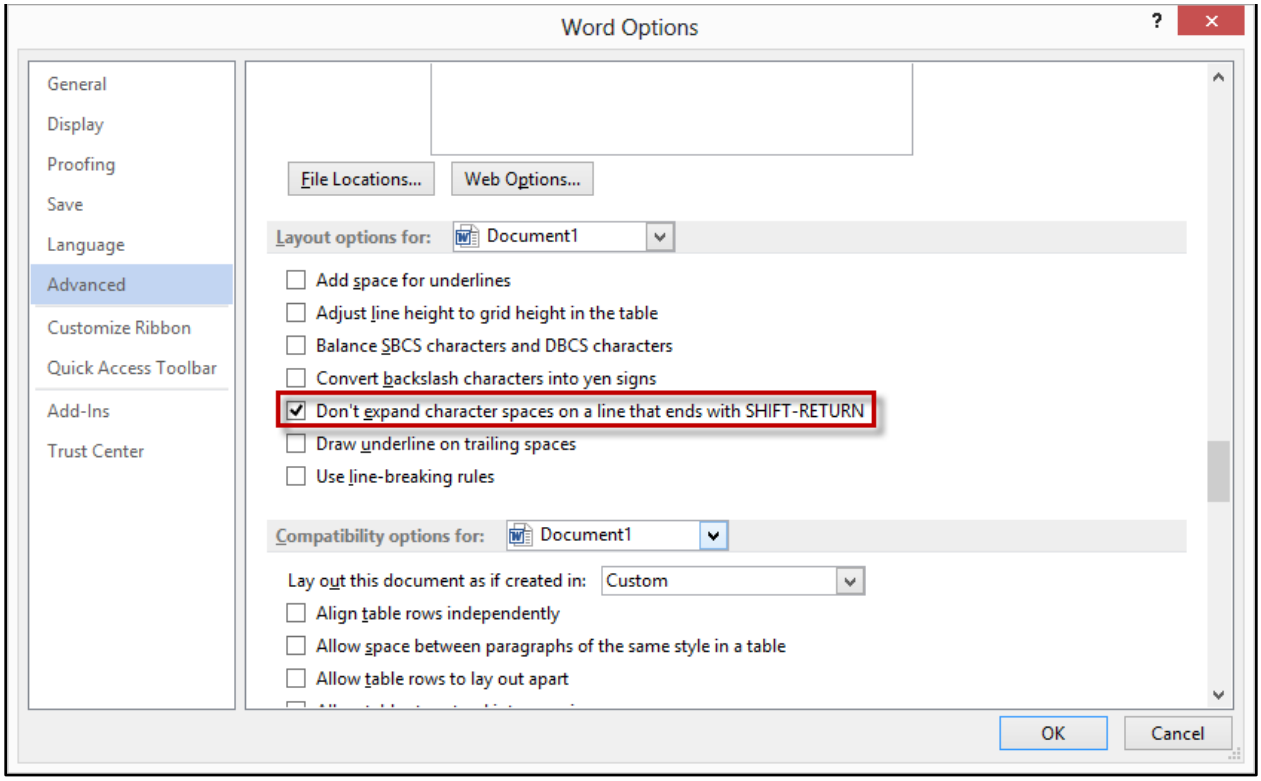
J. **Options ➔ Advanced ➔ Fidelity & General**:



i. Change the heading in **Preserve fidelity when sharing this document** to A**ll New Documents** (so the setting change applies to all future documents) and clear the **Embed linguistic data** box. "Linguistic data" refers to things like speech (from text-to-speech or speech-to-text applications or add-ins) and handwriting. You're probably not using either of those things so embedding them only makes the file-sizes bigger (unnecessarily).

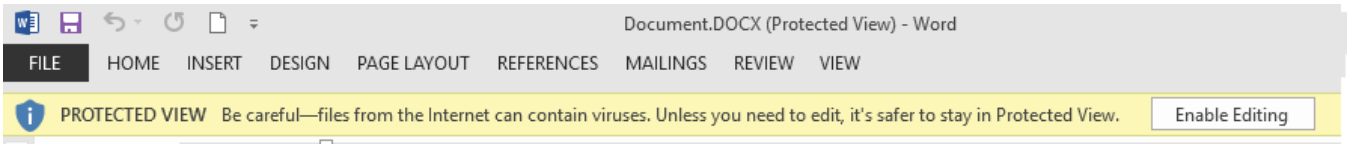
ii. Click **File Locations** and make sure that Word is defaulted to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.

K. **Options ➔ Advanced ➔ Layout Options**:



Check **Don't expand character spaces on a line that ends with SHIFT-RETURN** because this is the number one reason that a few words will be spread across the entire line with giant gaps between each word. For your information, Shift + Return = "soft return" which tricks Word into thinking that what appears to be two lines of text are actually one line of text.

L. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Protected View**: By default Protected View is enabled. When enabled, Word displays a warning if the Word document was created on a different system. While the warning is displayed, the file may only be viewed, not edited. To edit the document, you must click the **Enable Editing button**.



i. Protected View disables all of the active content in the document and reduces the risk of infection from a worm, virus, or other malware that could be embedded in an unknown document.

ii. If protected view bothers you, you may disable it. Yes, there is risk involved in disabling it. ***You should check with your system administrator prior to unchecking***

these boxes. To change these settings, go to **Protected View** and uncheck one or all of the boxes. See **Error! Reference source not found.**.

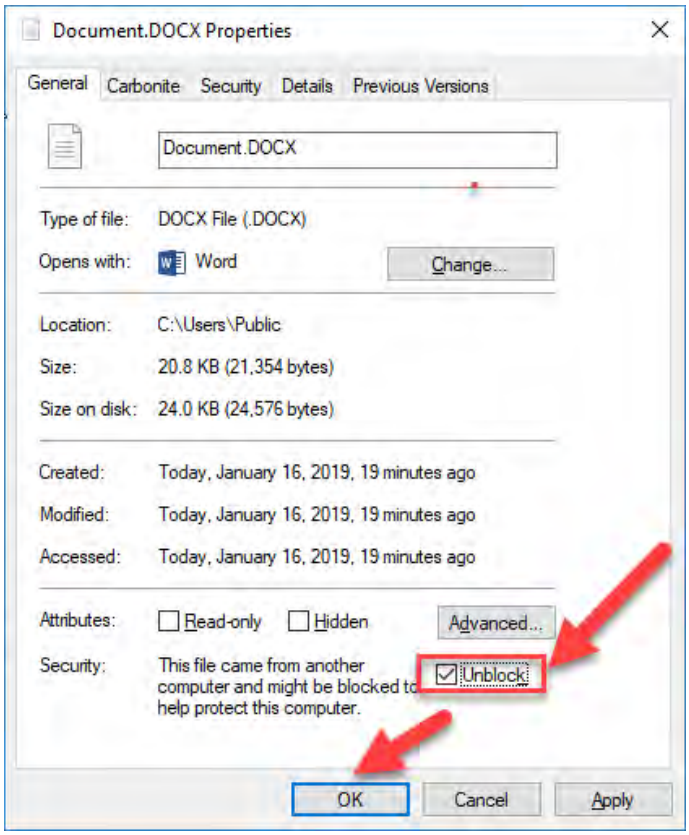
iii. These boxes enable protected view, unchecking them disables the protection.

iv. **Enable Protected View for files originating from the Internet.** This should probably remain checked. If you download a Word document from a web page, or anywhere else from the internet, you will probably want the Protected View protection.

v. **Enable Protected View for files located in potentially unsafe locations.** This is the main cause of triggering Protected View when opening a file from a network folder. You may disable this, but you may want to make your network server a "Trusted Location" instead. (See Trusted Location, below.) Unchecking this box also disables Protected View from other locations, such as USB thumb drives.

vi. **Enable Protected View for Outlook attachments.** With this checked, you will receive a protected view warning for every Word document that you open as an attachment from Outlook. Unchecking this box turns off the protection.

vii. **NOTE:** In addition to these settings, Windows may "block" Outlook attachments that you save to your file system. To unblock them, you must right-click the file, select **Properties**, check the **Unblock box** (on some systems this appears as a button instead of a checkbox), and click **OK**:

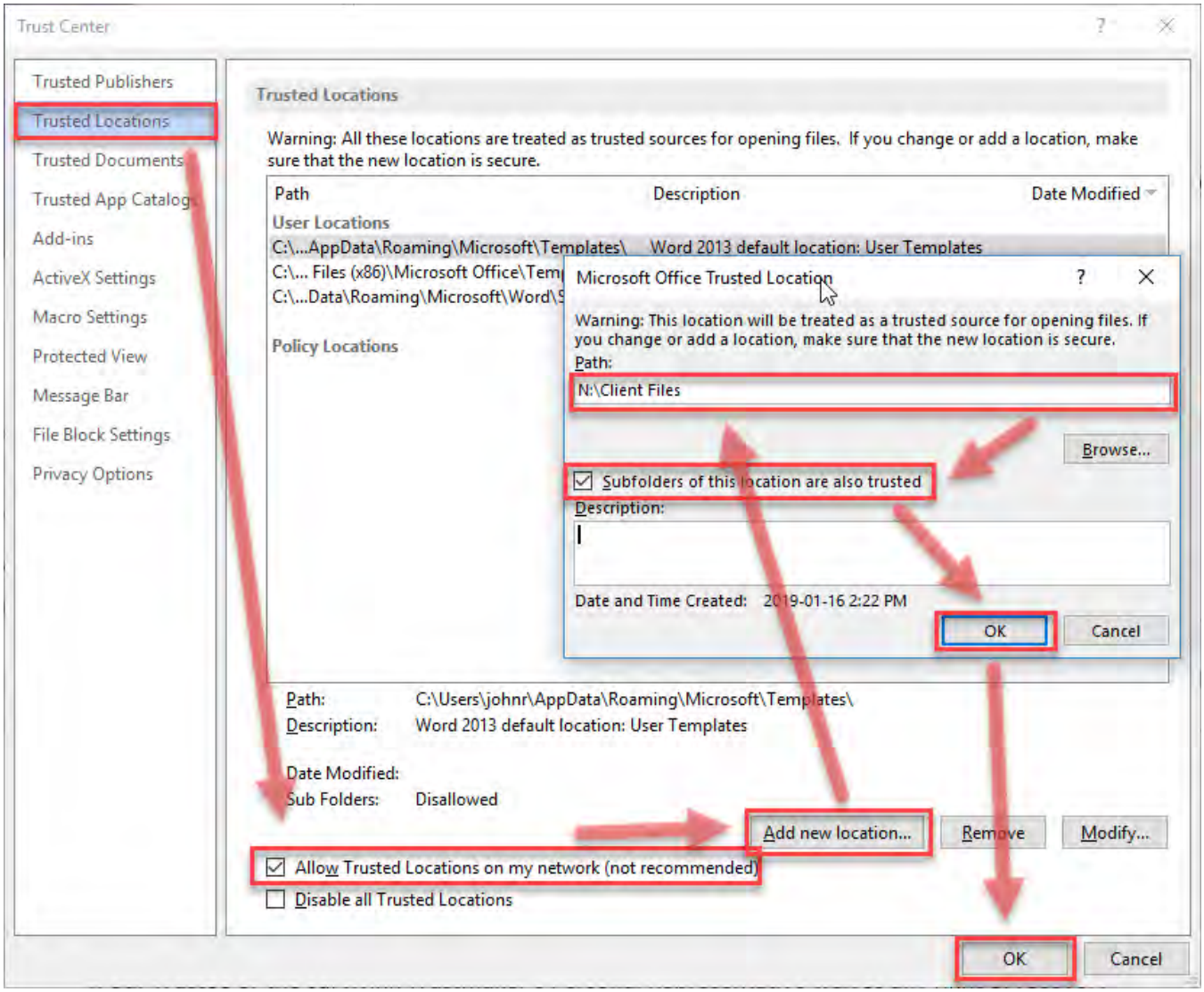


M. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Trusted Locations**: Trusted Locations are for folders on your system or on your network that you trust. Adding a folder or network share as a Trusted Location completely disables all of the Trust Center checks and protections for that location. To add a folder such as "N:\Client Files" as Trusted Location:

i. Go to File ➔ Options ➔ Trust Center ➔ Trust Center Settings ➔ Trusted Locations.

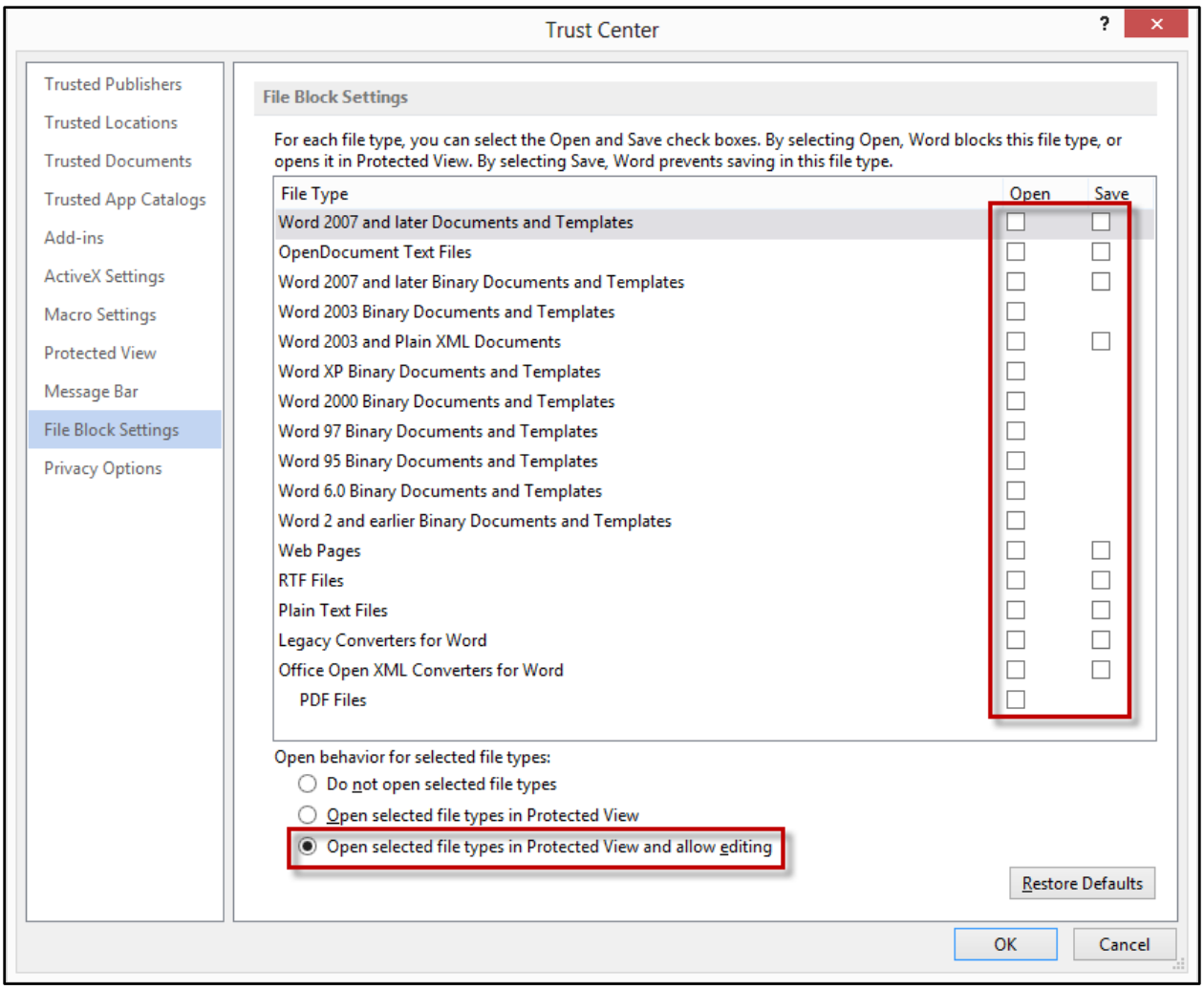
ii. Check the **Allow Trusted Locations on my network**. You will not be able to enter a network location without checking this box.

iii. Click **Add new location**, enter the path of the folder and check **Subfolders of this location are also trusted**. Then click **OK** and **OK**. All documents in that folder will now be trusted, and the Trust Center will no longer check them.

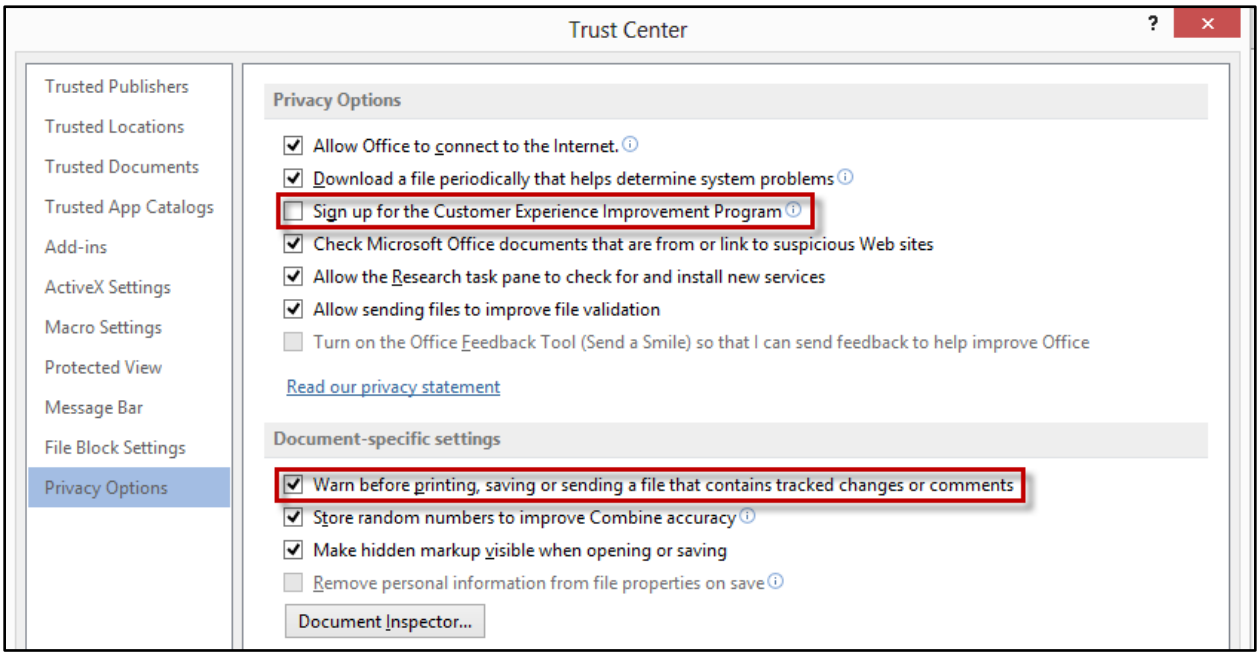


N. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ File Block Settings**: File Block Settings will trigger Protected View for all files of a particular type regardless of where they are located. Again, there is risk involved in disabling this feature. ***Check with your system administrator before unchecking these boxes***. In particular, there have been prior issues with RTF files.

i. To have all file types open and allow editing without a prompt, under the **File Block Settings**, uncheck all of the check boxes and under **Open behavior for selected filed types**, select **Open selected file types in Protected View and allow editing**. See **Error! Reference source not found.**


Trust Center
Trusted Publishers
Trusted Locations
Trusted Documents
Trusted App Catalogs
Add-ins
ActiveX Settings
Macro Settings
Protected View
Message Bar
File Block Settings
Privacy Options
File Block Settings
For each file type, you can select the Open and Save check boxes. By selecting Open, Word blocks this file type, or opens it in Protected View. By selecting Save, Word prevents saving in this file type.
File Type
Open
Save
Word 2007 and later Documents and Templates
OpenDocument Text Files
Word 2007 and later Binary Documents and Templates
Word 2003 Binary Documents and Templates
Word 2003 and Plain XML Documents
Word XP Binary Documents and Templates
Word 2000 Binary Documents and Templates
Word 97 Binary Documents and Templates
Word 95 Binary Documents and Templates
Word 6.0 Binary Documents and Templates
Word 2 and earlier Binary Documents and Templates
Web Pages
RTF Files
Plain Text Files
Legacy Converters for Word
Office Open XML Converters for Word
PDF Files
Open behavior for selected file types:
Do not open selected file types
Open selected file types in Protected View
Open selected file types in Protected View and allow editing
Restore Defaults
OK
Cancel

O. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Privacy Options**:

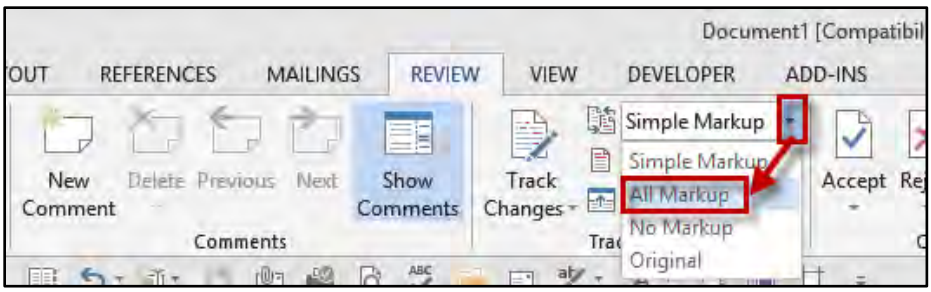


Make sure you clear the **Sign up for the Customer Experience Improvement Program box** and check the **Warn before printing, saving or sending a file that contains tracked changes or commands box**.

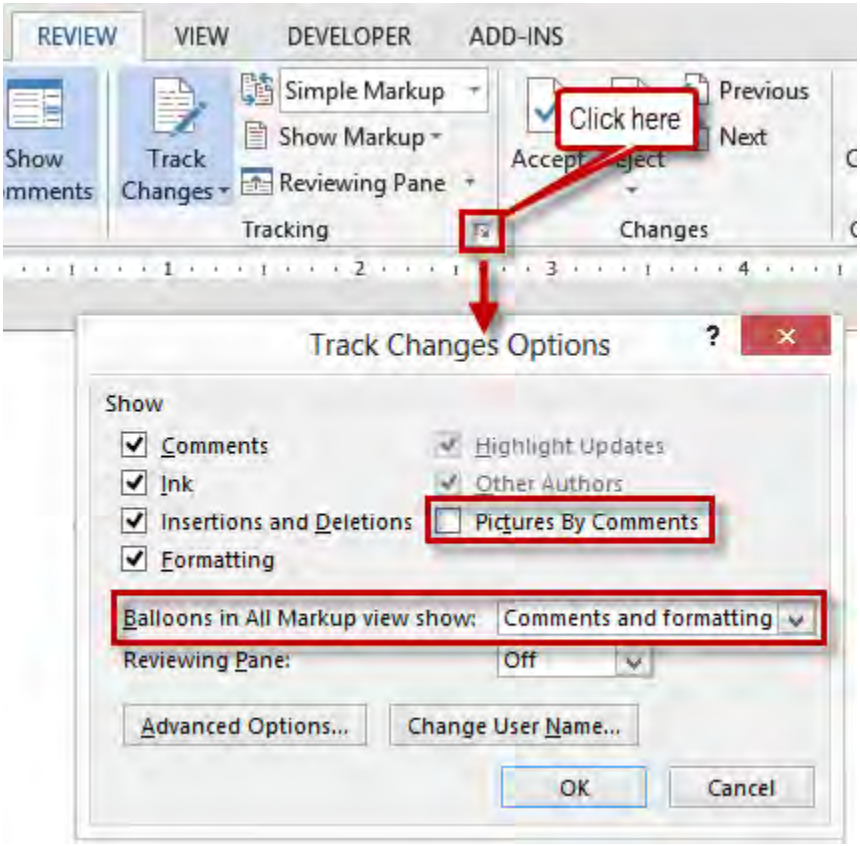
P. **Lock In Your Setting Changes**: Make sure that after you're done with all of the foregoing changes that you click the **OK** button, **NOT Cancel** and **NOT** the **X button** in the top, right-hand corner of the dialog. That makes the changes stick. It's a good idea after you do this to exit Word, re-launch Word and spot check a couple of the settings to ensure that they're still modified. If the changes don't stick, there are a couple of reasons that could happen and we can help you figure out why. Just send us an email - info@affinityconsulting.com.

Q. **Fix Track Changes Settings**: Track Changes was modified in Word 2013 and there are a few changes you'll want to make with it. All of these changes begin on the **Review ribbon** in Word 2013.

i. **Change the Markup**: By default, Word shows you **Simple Markup** which means that if you delete text, it literally disappears and a little red, vertical line appears in the left margin adjacent to the line where something was deleted. Of course, I not only want to know that something was deleted, but *what* was deleted. Therefore, switch from **Simple Markup** to **All Markup** (see below).



ii. **Track Changes Options**: In order to get to this dialog, click **Review ribbon | Tracking launcher**.

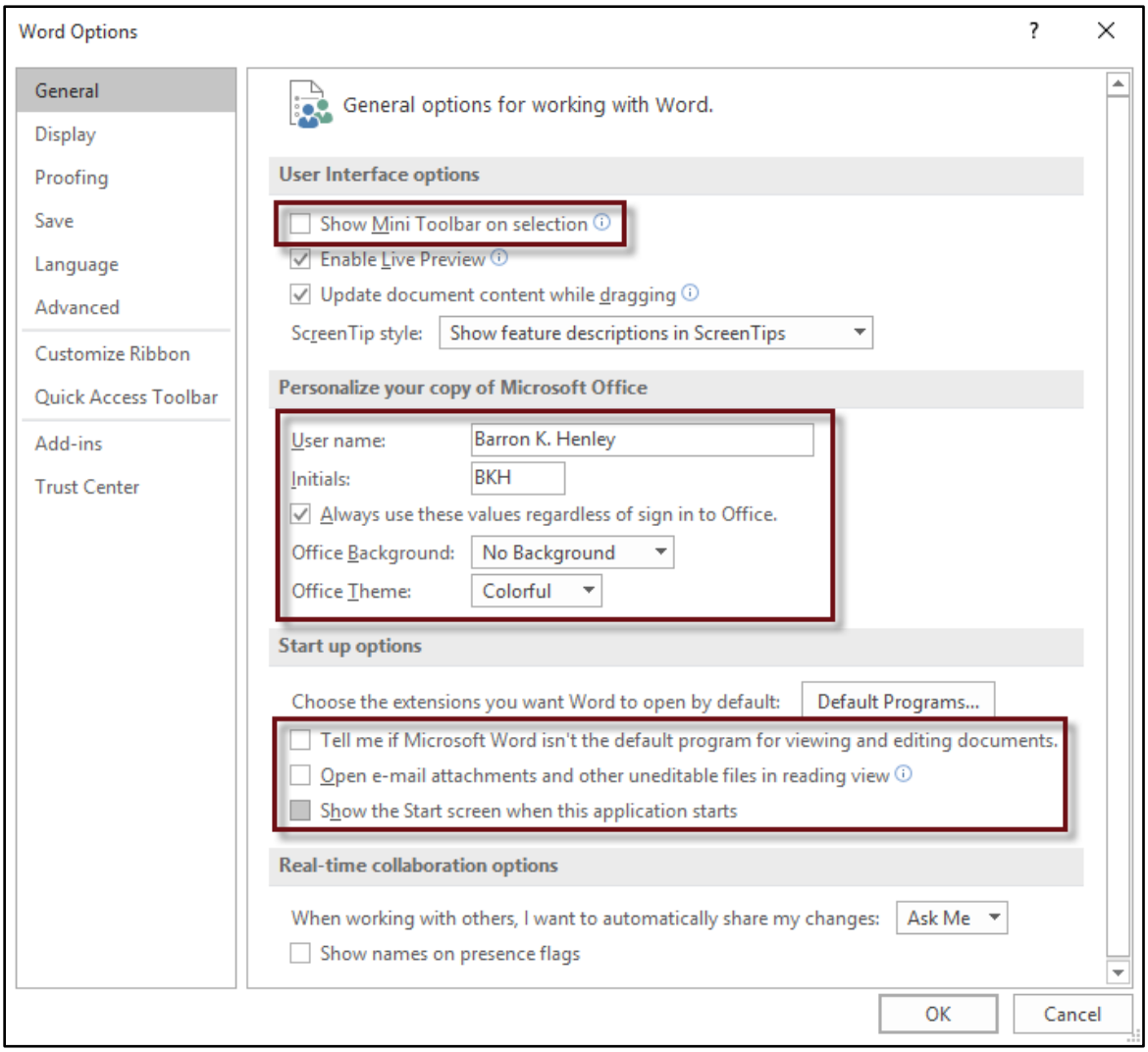


iii. Clear **Pictures By Comments** (unnecessary and clutters up the comment screen).

iv. **Balloons are best used for Comments and Formatting only**: not Revisions which is the default setting.

3. Default Setting Changes for Word 2016: **NOTE that you get to all of the following screens by clicking the File menu ➔ Options.**

A. **Options ➔ General**:



i. Uncheck **Show Mini Toolbar on selection**. This controls whether an additional pop up window with common font options is displayed whenever text is selected. This can be distracting and cover up part of the document. Therefore, uncheck this box.

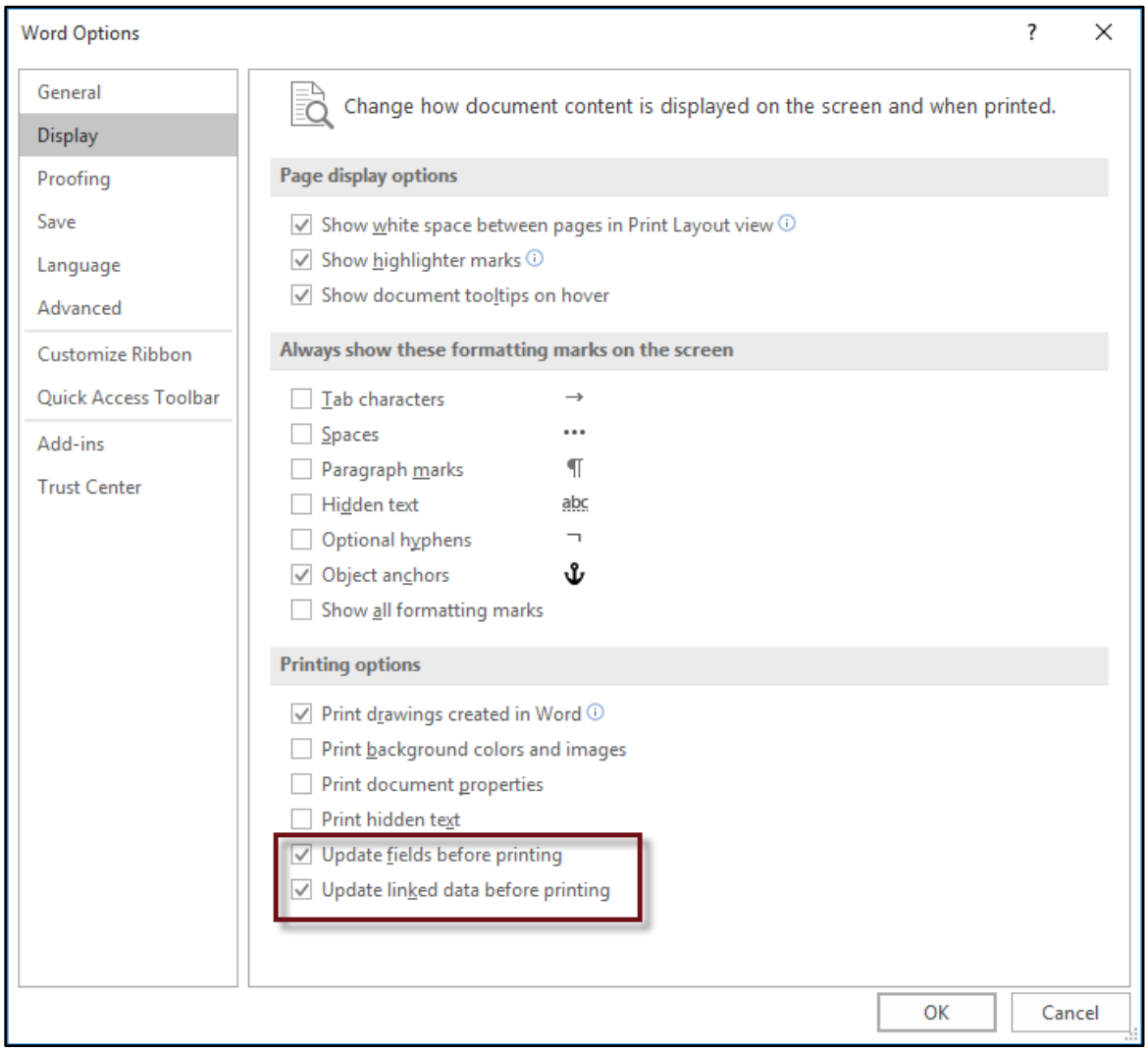
ii. **Personalization**: Make sure your name and initials are in the **User name** and **Initials boxes**. Check **Always use these values…** and choose an **Office Background** and **Office Theme**. The background is the frankly silly graphic that appears at the top, right-hand corner of the Word screen. You had a chance to choose something during installation but you may want to change it now that you've seen it. The default Office Theme of stark, blinding white might not be what you would like. I recommend you change it to Colorful.

iii. **Tell me if Word isn't default program for viewing and editing documents**: This is just annoying, particularly if you just don't want Word to be your default.

iv. **Open e-mail attachments in Reading View**: Clear this so attachments open normally.

v. **Get Rid of the Start Screen**. This is the giant template selection screen that opens whenever you open Word. If you would prefer to go directly to a blank document when you open Word, clear the **Show the Start Screen when this application starts** box.

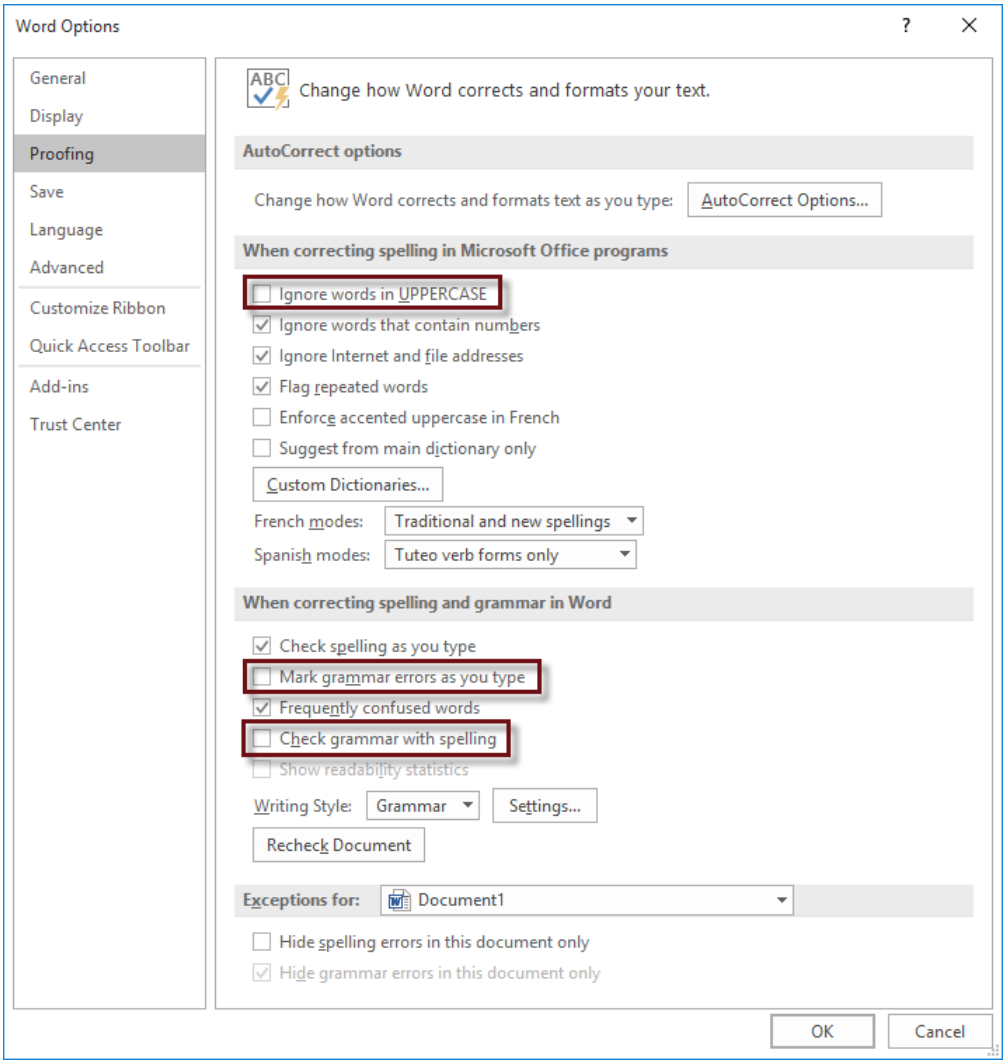
B. **Options ➔ Display**:



i. Check **Update fields before printing**. Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.

ii. Check **Update linked data before printing**. This will make sure that all linked files are updated before printing.

C. **Options ➔ Proofing**:

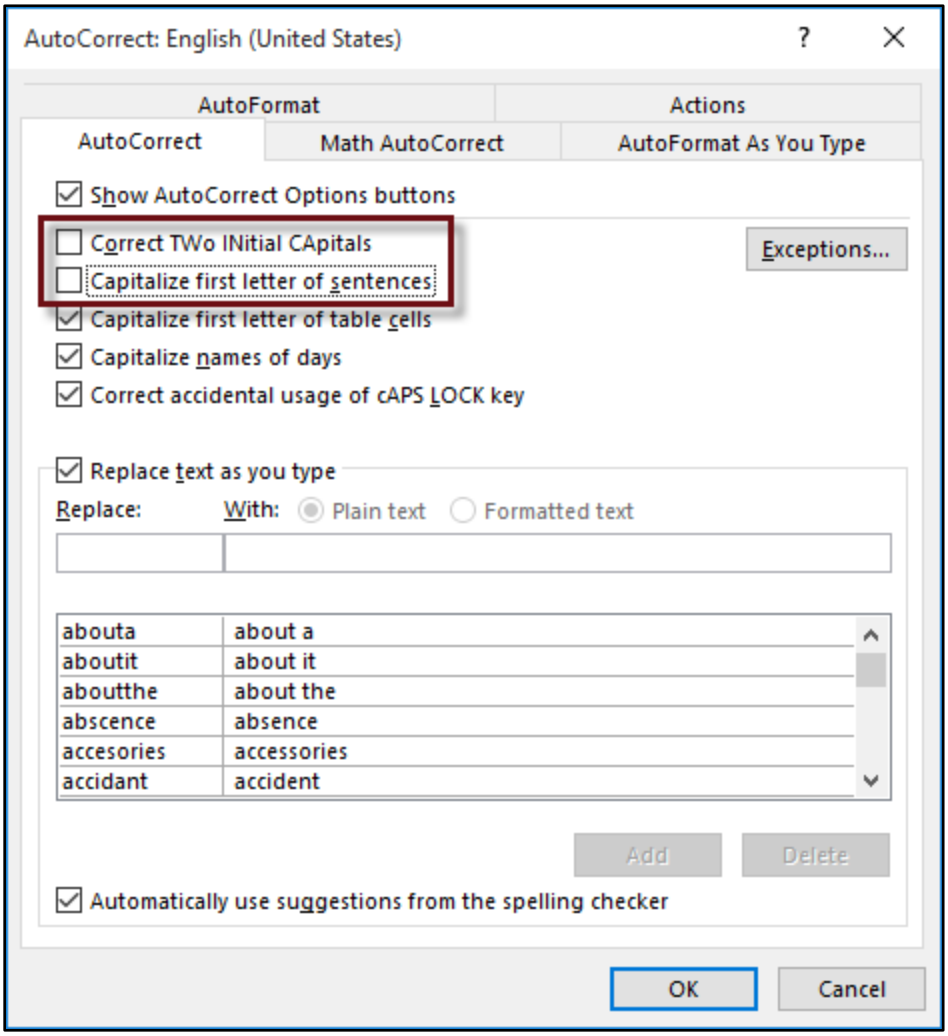


i. Uncheck **Ignore words in UPPERCASE**. Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.

ii. Uncheck **Mark grammar errors as you type**. This will eliminate the green squiggly lines in the document.

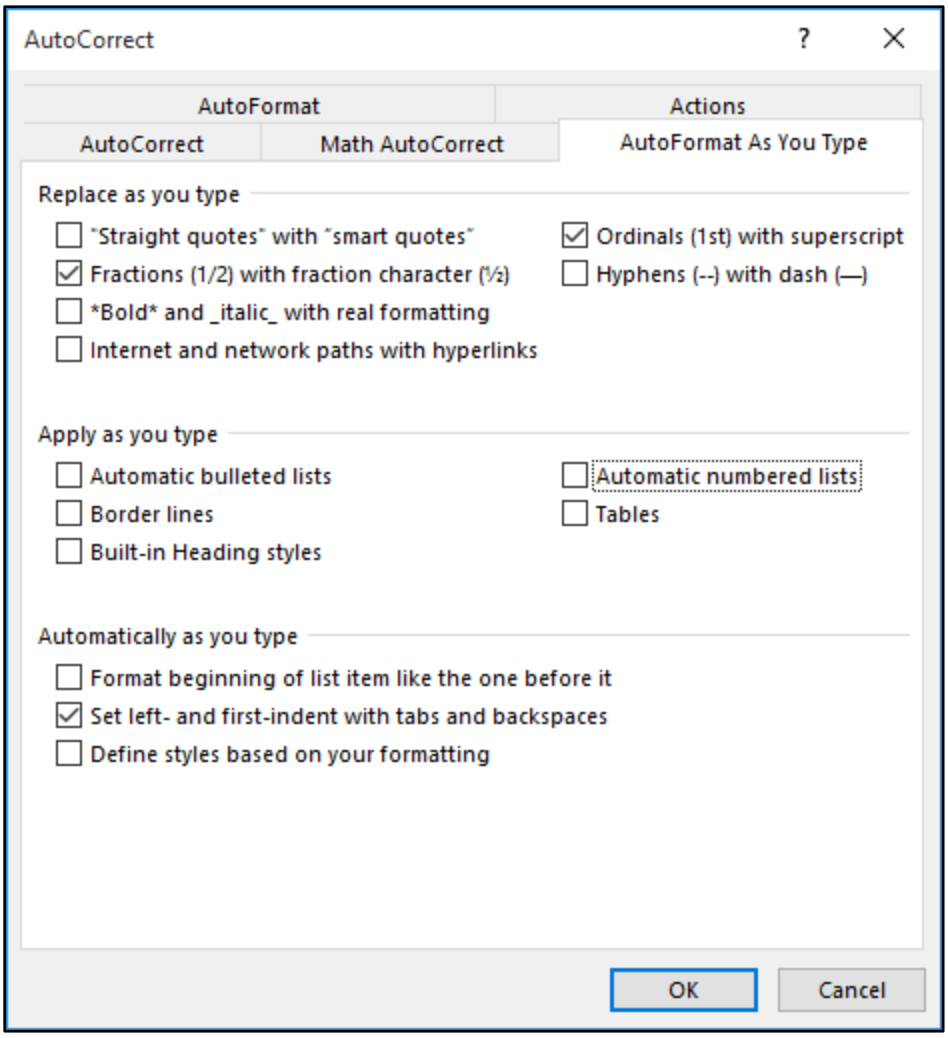
iii. Uncheck/Check **Check grammar with spelling**. Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

D. **Options ➔ Proofing and Autocorrect**: Next, go to **Proofing** and click on **Autocorrect Options** button. This will launch the **Autocorrect Options dialog**.



i. Uncheck **Correct TWo INitial CApitals** and **Capitalize first letter of sentences** as most people find that annoying because they MEANT to do it (IDs or cc:). **Note**: you can also delete the AutoCorrect entries in the list at the bottom of the dialog which replaces (c) with © and (r) with ®.

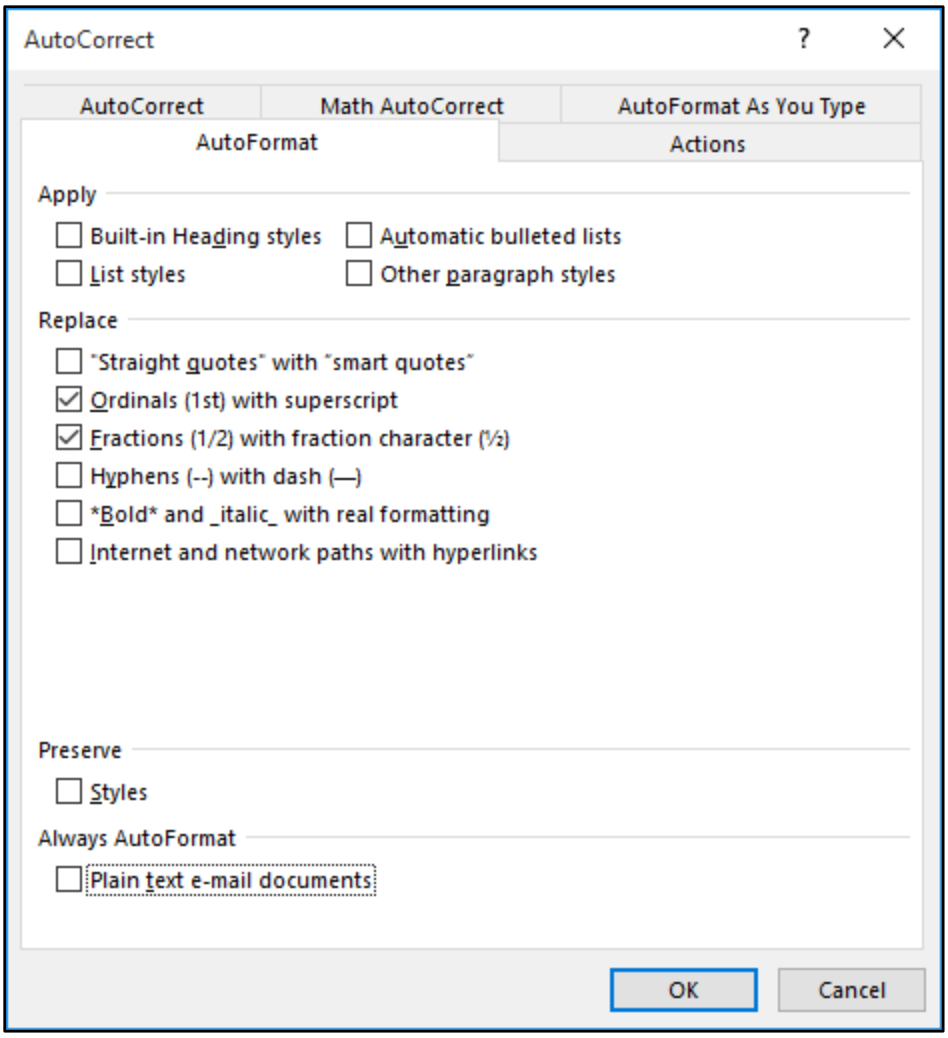
ii. Next click on the **AutoFormat As You Type** tab.



iii. Uncheck everything except **Ordinals**, **Fractions** and **Set left and first indent with tabs and backspaces**. Optional items include checking **Internet and network paths with hyperlinks** will create clickable hyperlinks to internet addresses, so that a person opening the document can click on the link and go to the web address right from the document. You might also check the **Straight quotes with smart quotes** but keep in mind that this may result in your quotation marks getting converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

iv. Be sure to uncheck everything else of this page!! The **Apply as you type section** causes Word to guess what is being typed and start inserting bulleted lists and tables on its own without any prompting to do so. Also be sure to uncheck **Define styles based on your formatting**. This option causes Word to create styles on its own.

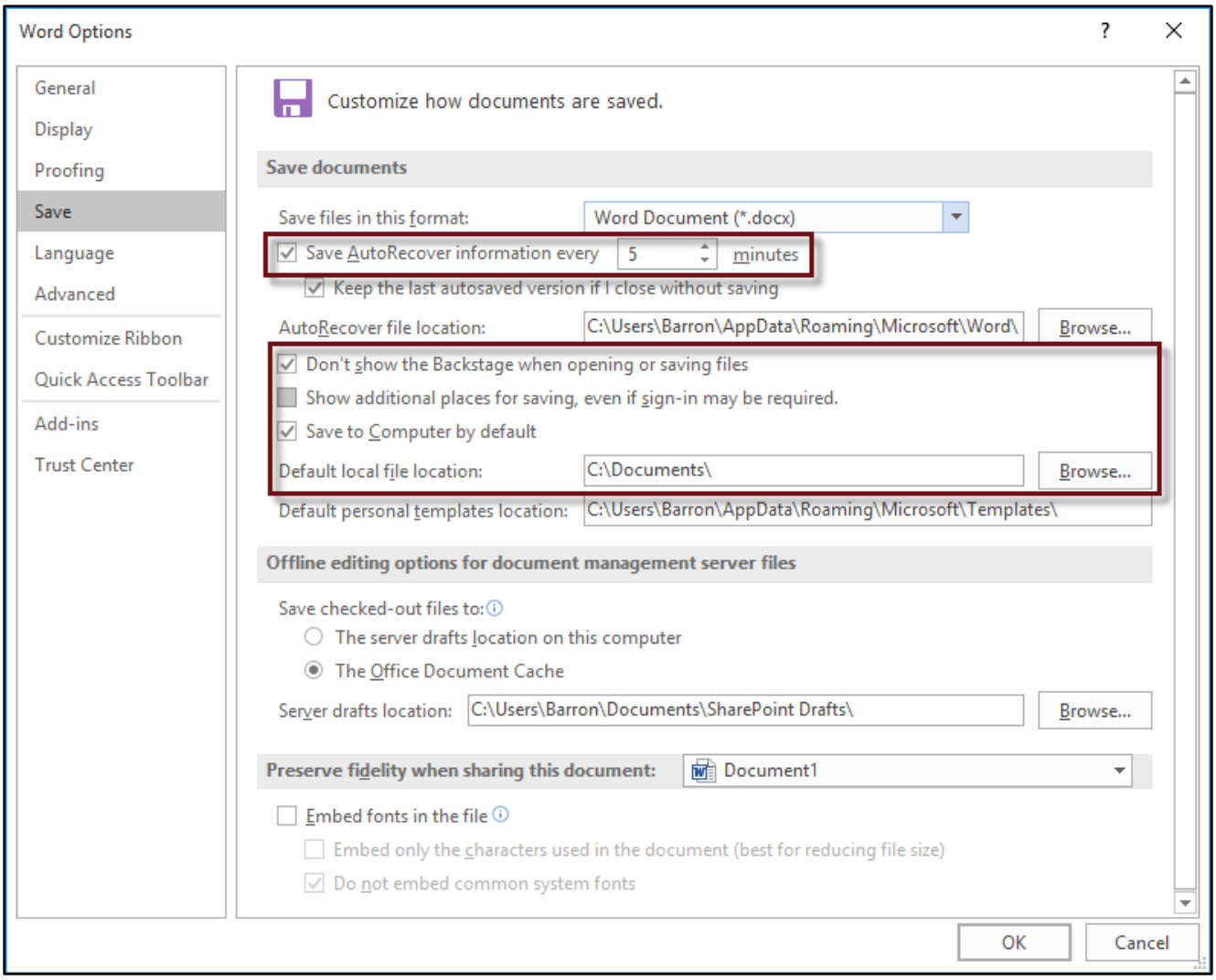
v. Finally, click on the **AutoFormat tab**.



vi. Make these options match the **AutoFormat As You Type options**.

vii. At this point, make sure to click the **OK** button or all of the changes will be lost.

E. **Options ➔ Save**:



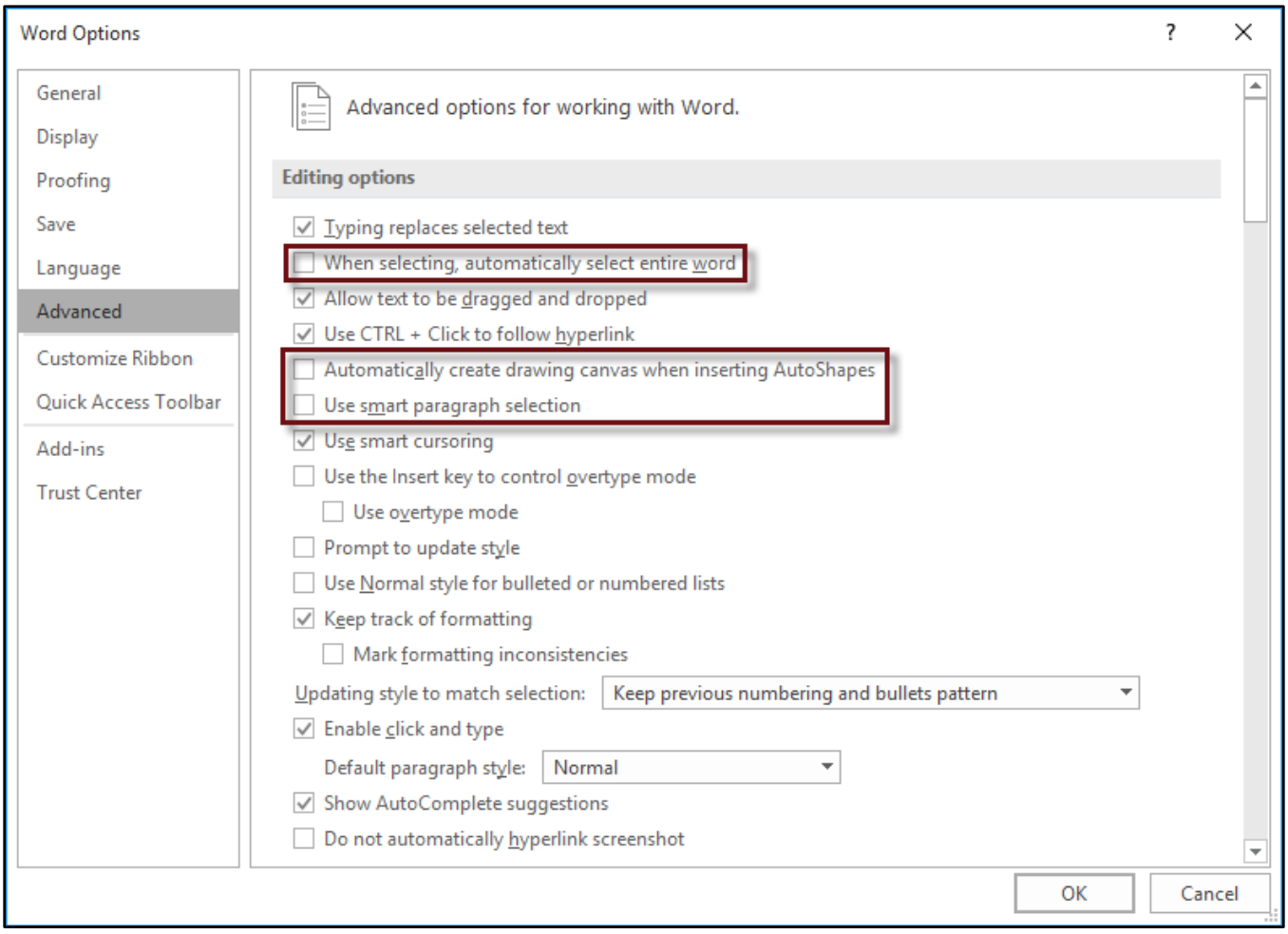
i. **Save AutoRecover information**: Reduce this to **5 minutes** rather than 10 minutes. More frequency is a good thing.

ii. **Don't show the Backstage when opening or saving files**: If you want Word 2016 to go directly to the open or save browse screens when you open or save a file, then check this box.

iii. **Show additional places for saving, even if sign-in may be required**: This is just a waste of space on your save screen, so clear this box.

iv. **Save to Computer by default**: Microsoft really wants you to save everything to OneDrive and you probably don't want to. Therefore, check this box.

F. **Options ➔ Advanced ➔ Editing Options**:



i. Uncheck **When selecting, automatically select entire word.** Regain control over your mouse.

ii. Uncheck A**utomatically create drawing canvas when inserting AutoShapes**.

iii. Uncheck **Use smart paragraph selection**.

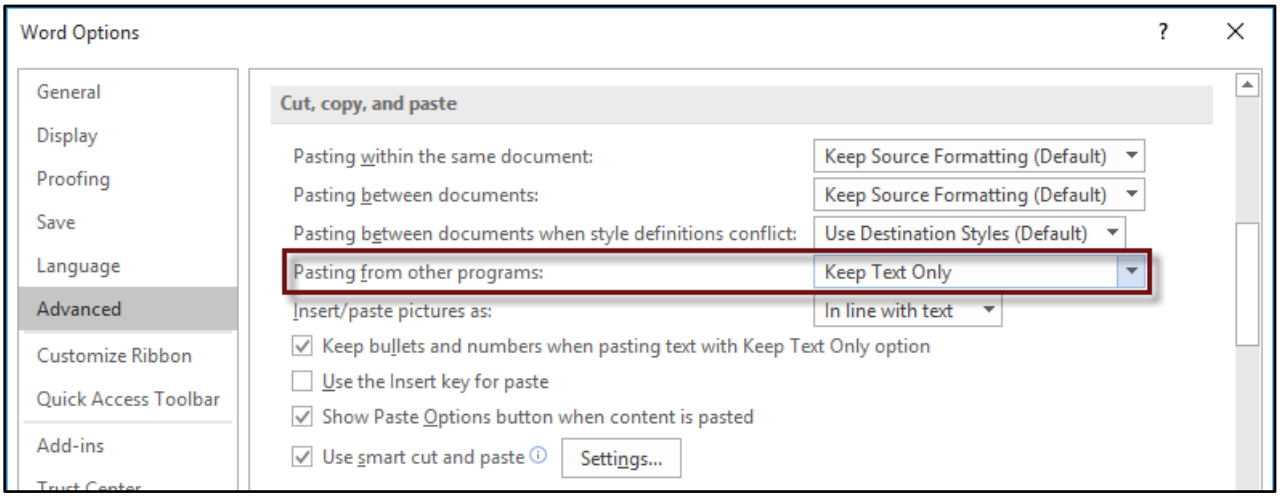
iv. Some other items to watch out for are:

a. Make sure **Typing replaces selected text** is checked. If not, you will not be able to overtype on top of a selected word

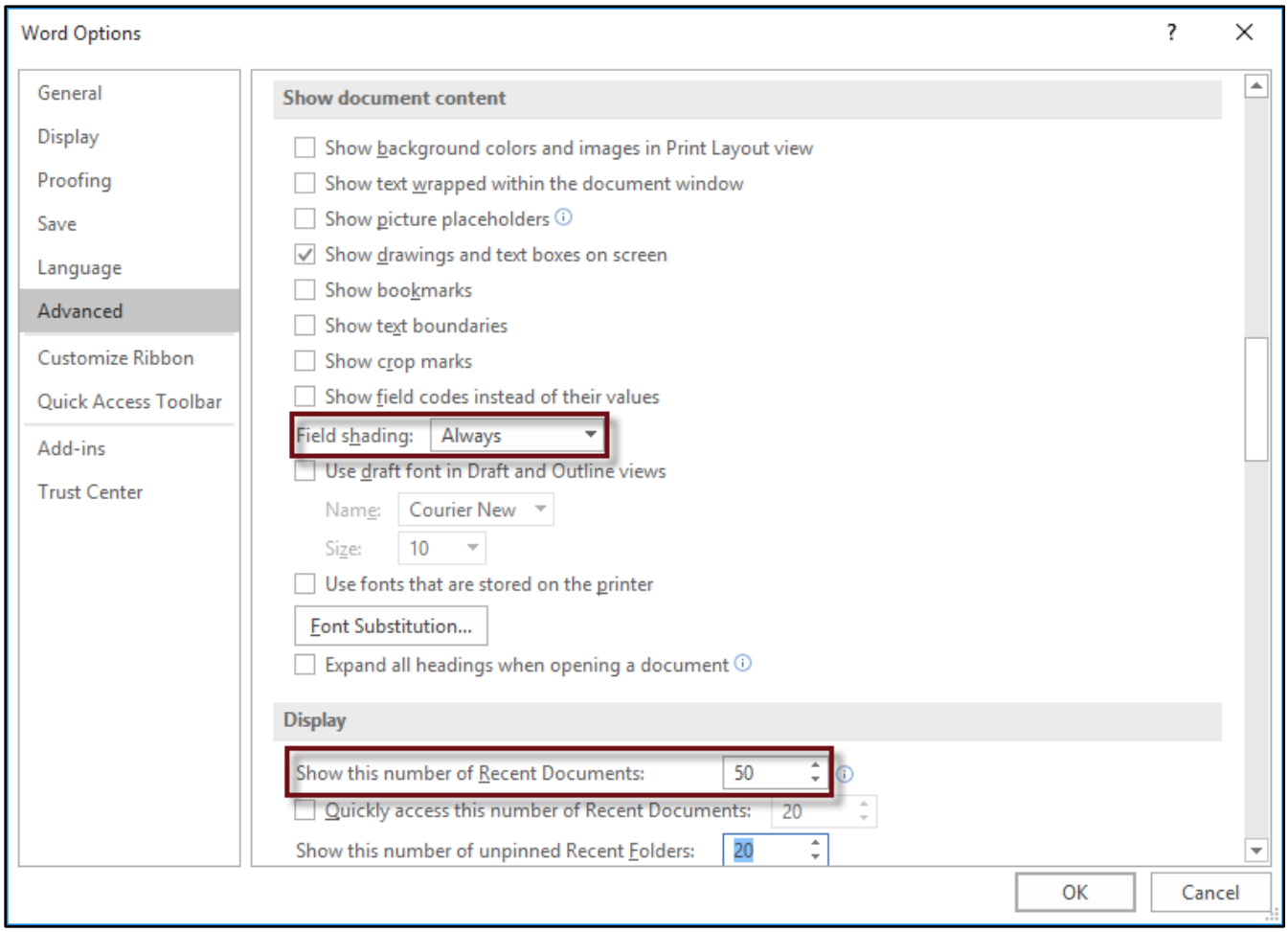
b. **Use smart cursoring** moves the cursor when you scroll up or down through the document, this may or may not be what you want

c. **Enable click and type,** in print layout, will format itself to place the text where you double click.

G. **Options ➔ Advanced ➔Cut, Copy and Paste**: Note that in this area you can control the default paste action in a variety of circumstances. When copying from other programs (such as a browser), we recommend that you strip all formatting off of the source text. By changing the setting shown below, this will always be the case. You may want to change some of the other settings as well depending upon how you work.



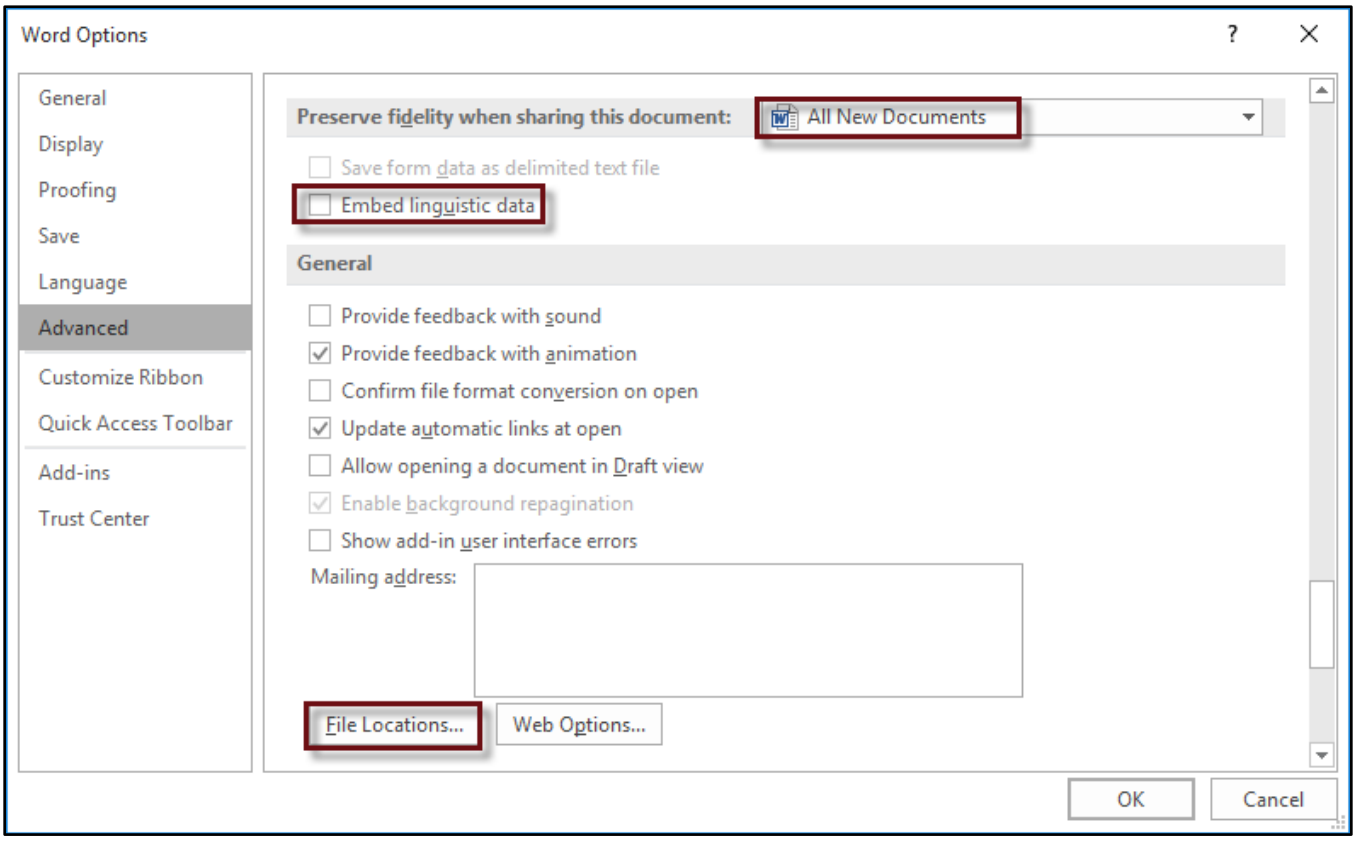
H. **Options ➔ Advanced ➔ Show Document Content**:



i. Change **Field shading** to **Always**.

ii. Change **Show this number of Recent Documents** to your preference.

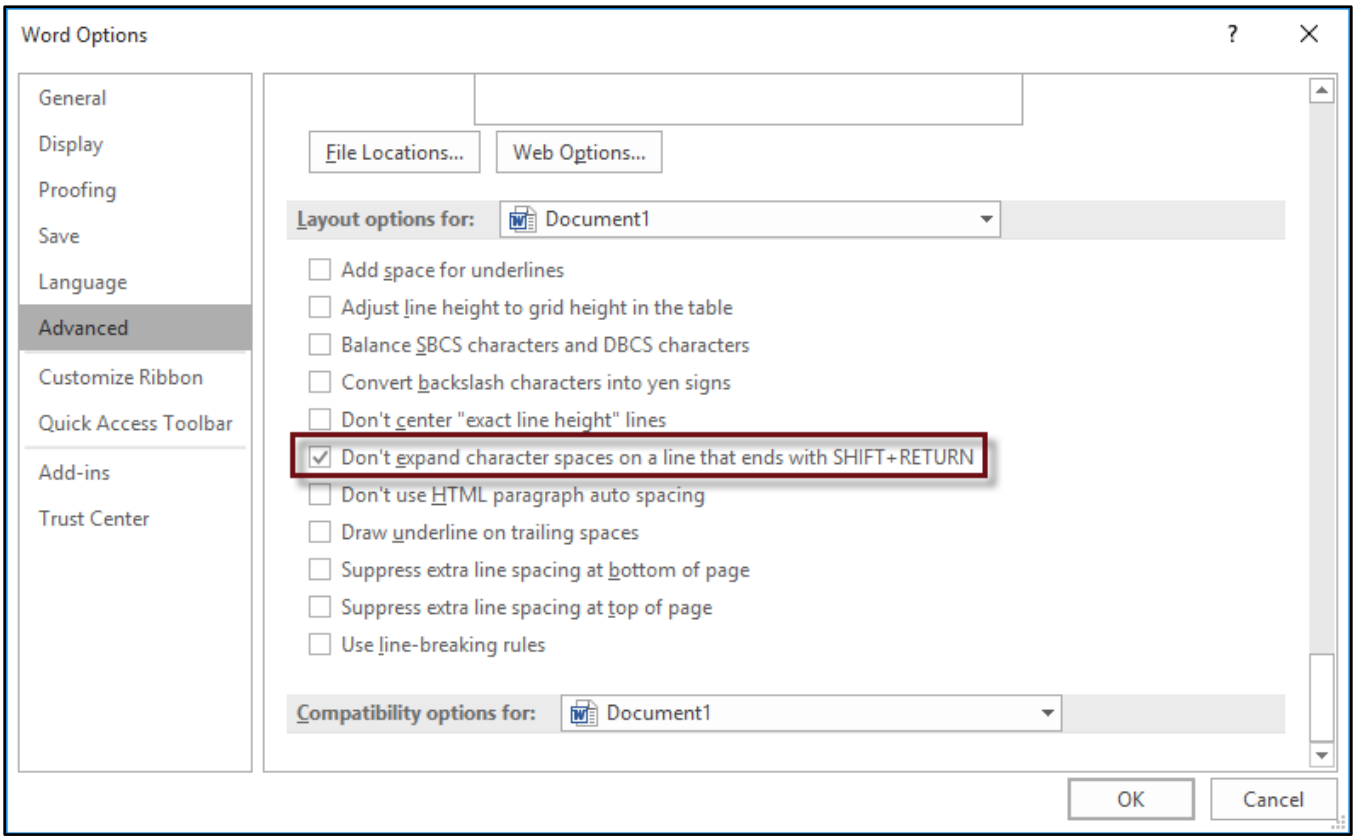
l. **Options ➔ Advanced ➔ Fidelity & General**:



i. Change the heading in **Preserve fidelity when sharing this document** to A**ll New Documents** (so the setting change applies to all future documents) and clear the **Embed linguistic data** box. "Linguistic data" refers to things like speech (from text-to-speech or speech-to-text applications or add-ins) and handwriting. You're probably not using either of those things so embedding them only makes the file-sizes bigger (unnecessarily).

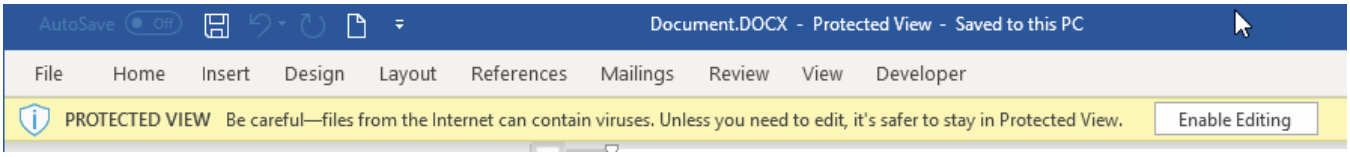
ii. Click **File Locations** and make sure that Word is defaulted to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.

J. **Options ➔ Advanced ➔ Layout Options**:



Check **Don't expand character spaces on a line that ends with SHIFT-RETURN** because this is the number one reason that a few words will be spread across the entire line with giant gaps between each word. For your information, Shift + Return = "soft return" which tricks Word into thinking that what appears to be two lines of text are actually one line of text.

K. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Protected View**: By default Protected View is enabled. When enabled, Word displays a warning if the Word document was created on a different system. While the warning is displayed, the file may only be viewed, not edited. To edit the document, you must click the **Enable Editing button**.



i. Protected View disables all of the active content in the document and reduces the risk of infection from a worm, virus, or other malware that could be embedded in an unknown document.

ii. If protected view bothers you, you may disable it. Yes, there is risk involved in disabling it. ***You should check with your system administrator prior to unchecking***

these boxes. To change these settings, go to **Protected View** and uncheck one or all of the boxes. See **Error! Reference source not found.**.

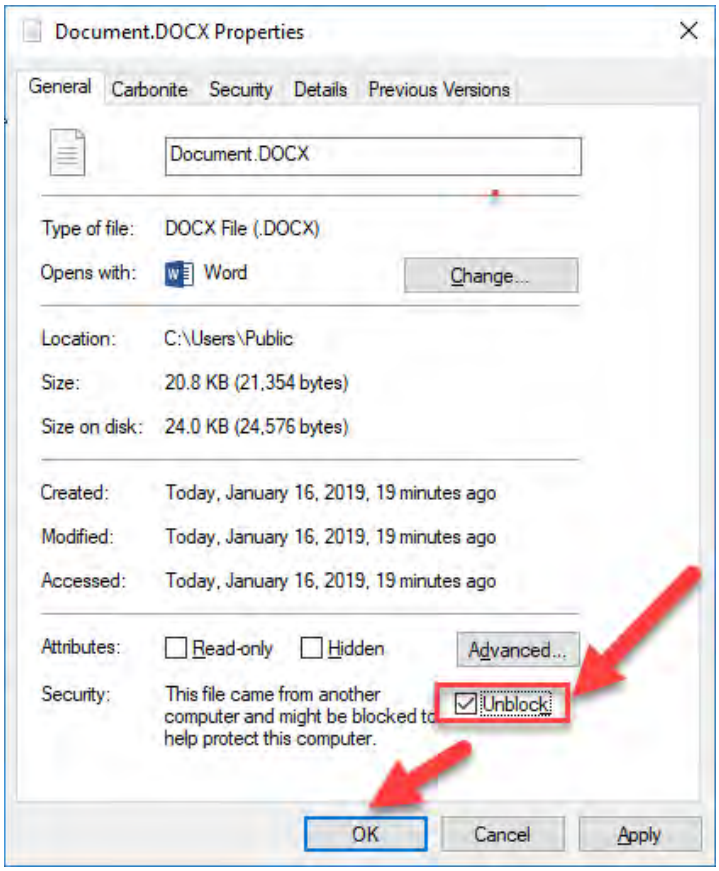
iii. These boxes enable protected view, unchecking them disables the protection.

iv. **Enable Protected View for files originating from the Internet.** This should probably remain checked. If you download a Word document from a web page, or anywhere else from the internet, you will probably want the Protected View protection.

v. **Enable Protected View for files located in potentially unsafe locations.** This is the main cause of triggering Protected View when opening a file from a network folder. You may disable this, but you may want to make your network server a "Trusted Location" instead. (See Trusted Location, below.) Unchecking this box also disables Protected View from other locations, such as USB thumb drives.

vi. **Enable Protected View for Outlook attachments.** With this checked, you will receive a protected view warning for every Word document that you open as an attachment from Outlook. Unchecking this box turns off the protection.

vii. **NOTE:** In addition to these settings, Windows may "block" Outlook attachments that you save to your file system. To unblock them, you must right-click the file, select **Properties**, check the **Unblock box** (on some systems this appears as a button instead of a checkbox), and click **OK**:

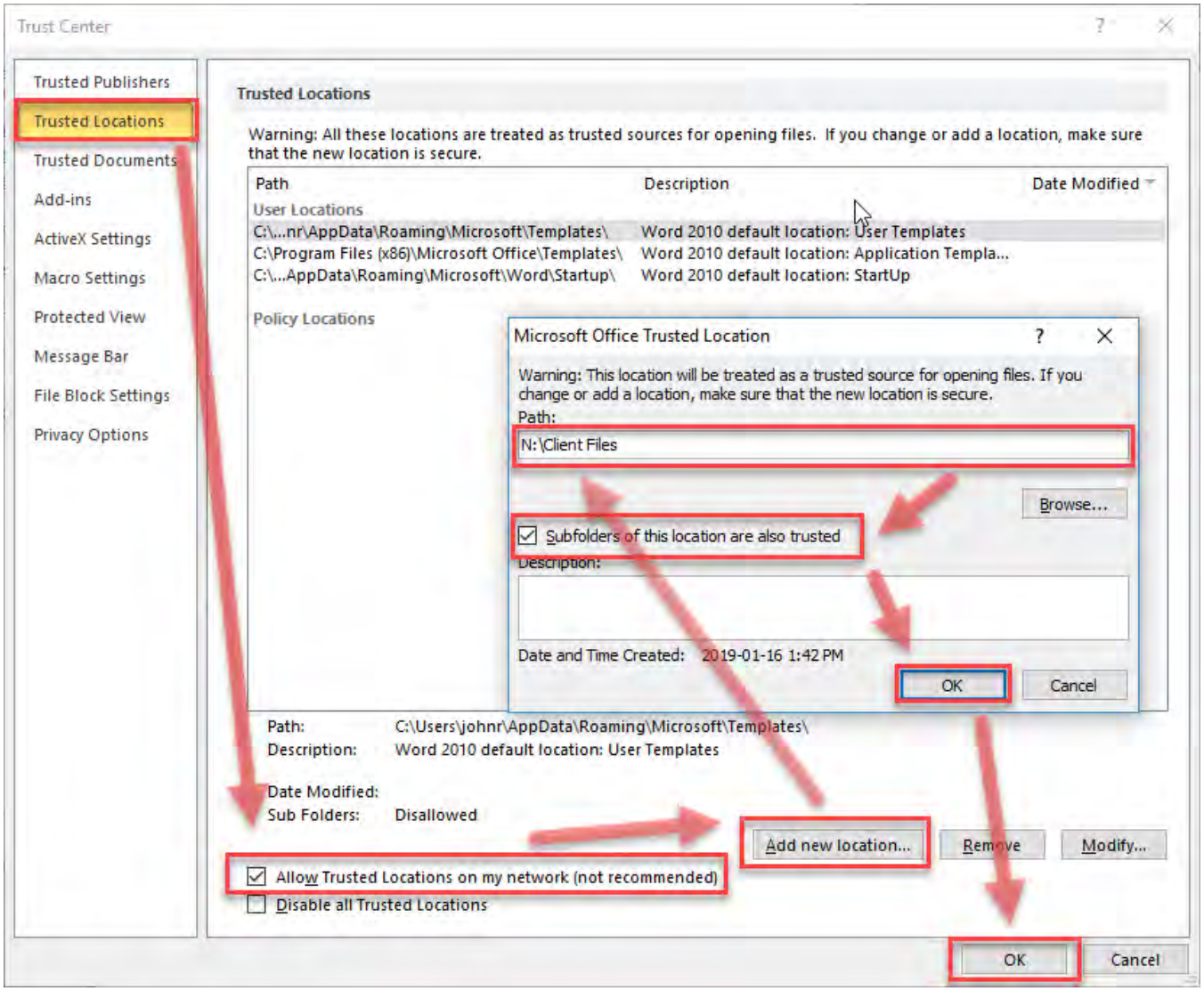


L. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Trusted Locations**: Trusted Locations are for folders on your system or on your network that you trust. Adding a folder or network share as a Trusted Location completely disables all of the Trust Center checks and protections for that location. To add a folder such as "N:\Client Files" as Trusted Location:

i. Go to File ➔ Options ➔ Trust Center ➔ Trust Center Settings ➔ Trusted Locations.

ii. Check the **Allow Trusted Locations on my network**. You will not be able to enter a network location without checking this box.

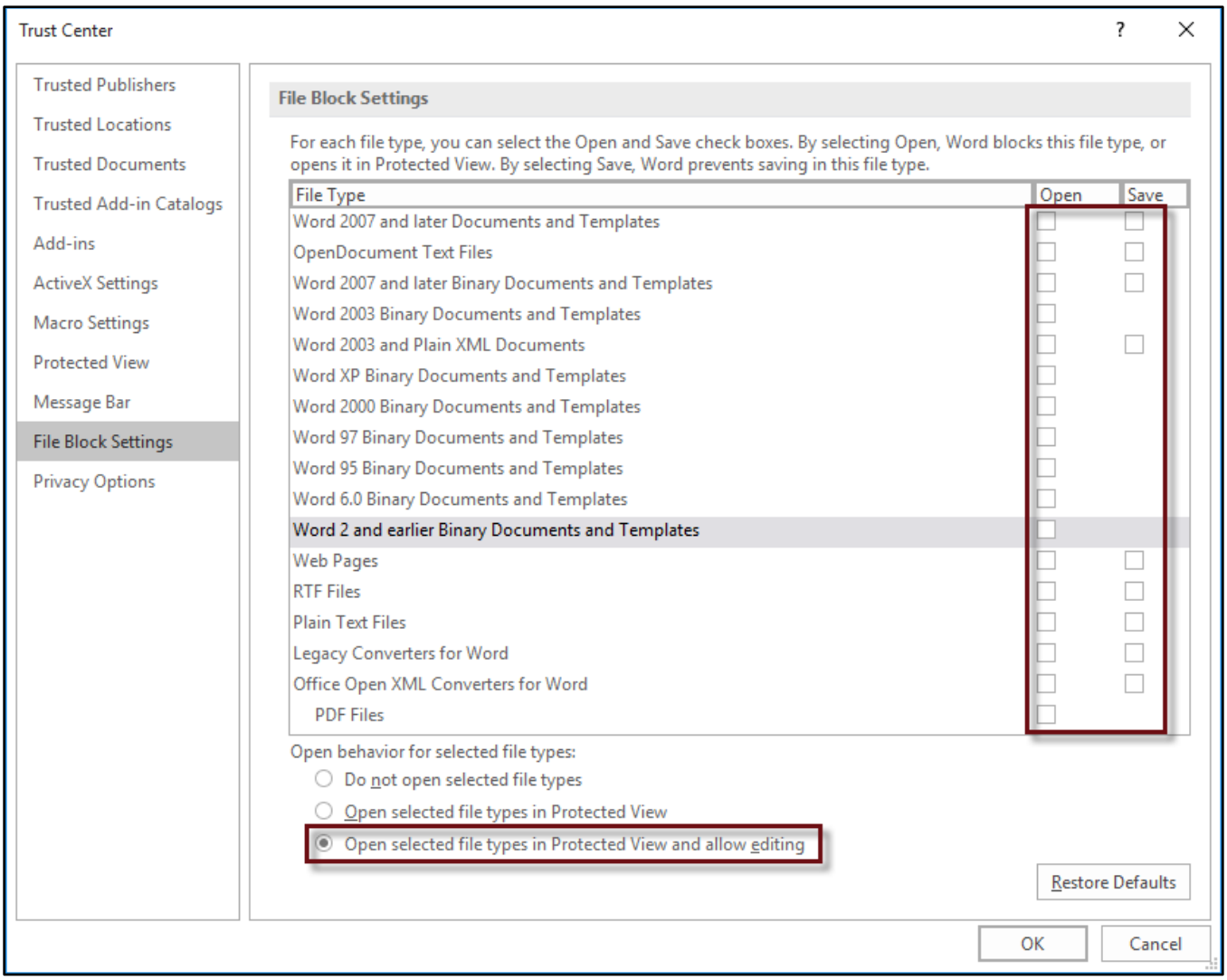
iii. Click **Add new location**, enter the path of the folder and check **Subfolders of this location are also trusted**. Then click **OK** and **OK**. All documents in that folder will now be trusted, and the Trust Center will no longer check them.



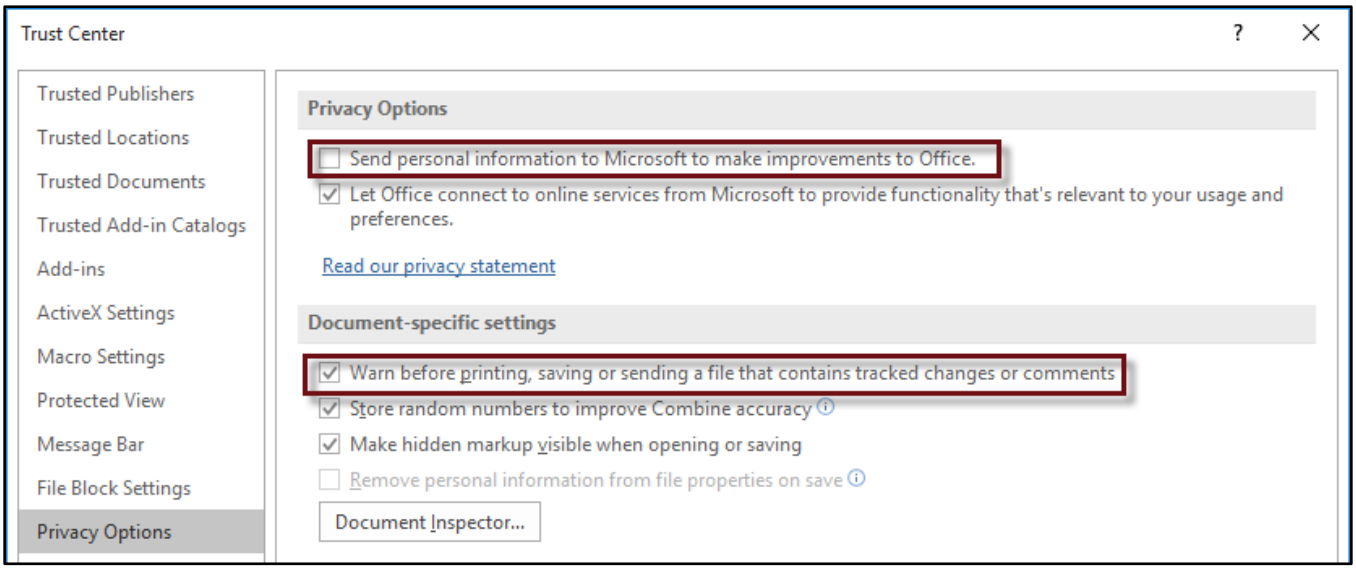
M. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ File Block Settings**:

i. File Block Settings will trigger Protected View for all files of a particular type regardless of where they are located. Again, there is risk involved in disabling this feature. ***Check with your system administrator before unchecking these boxes.*** In particular, there have been prior issues with RTF files.

ii. To have all file types open and allow editing without a prompt, under the **File Block Settings**, uncheck all of the check boxes and under **Open behavior for selected filed types**, select **Open selected file types in Protected View and allow editing**. See **Error! Reference source not found.**


Trust Center
Trusted Publishers
Trusted Locations
Trusted Documents
Trusted Add-in Catalogs
Add-ins
ActiveX Settings
Macro Settings
Protected View
Message Bar
File Block Settings
Privacy Options
File Block Settings
For each file type, you can select the Open and Save check boxes. By selecting Open, Word blocks this file type, or opens it in Protected View. By selecting Save, Word prevents saving in this file type.
File Type
Open
Save
Word 2007 and later Documents and Templates
OpenDocument Text Files
Word 2007 and later Binary Documents and Templates
Word 2003 Binary Documents and Templates
Word 2003 and Plain XML Documents
Word XP Binary Documents and Templates
Word 2000 Binary Documents and Templates
Word 97 Binary Documents and Templates
Word 95 Binary Documents and Templates
Word 6.0 Binary Documents and Templates
Word 2 and earlier Binary Documents and Templates
Web Pages
RTF Files
Plain Text Files
Legacy Converters for Word
Office Open XML Converters for Word
PDF Files
Open behavior for selected file types:
Do not open selected file types
Open selected file types in Protected View
Open selected file types in Protected View and allow editing
Restore Defaults
OK
Cancel

N. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Privacy Options**:



Go to the **Trust Center** and click the **Trust Center Settings button**. A new dialog will open. Click on **Privacy Options** and check **Warn before printing, saving or sending a file that contains tracked changes or comments**. Also clear the **Send personal information to Microsoft to make improvements to Office**.

O. **Lock In Your Setting Changes**: Make sure that after you're doing with all of the foregoing changes that you click the **OK** button, **NOT Cancel** and **NOT** the **X button** in the top, right-hand corner of the dialog. That makes the changes stick. It's a good idea after you do this to exit Word, re-launch Word and spot check a couple of the settings to ensure that they're still modified. If the changes don't stick, there are a couple of reasons that could happen and I can help you figure out why. Just send me an email - info@affinityconsulting.com.

P. **Fix Track Changes Settings**: There are a few changes you'll want to make to the Track Changes defaults. All of these changes begin on the **Review ribbon** in Word 2016.

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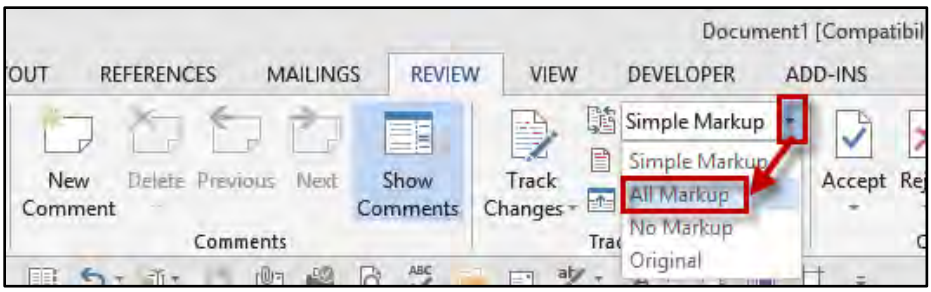
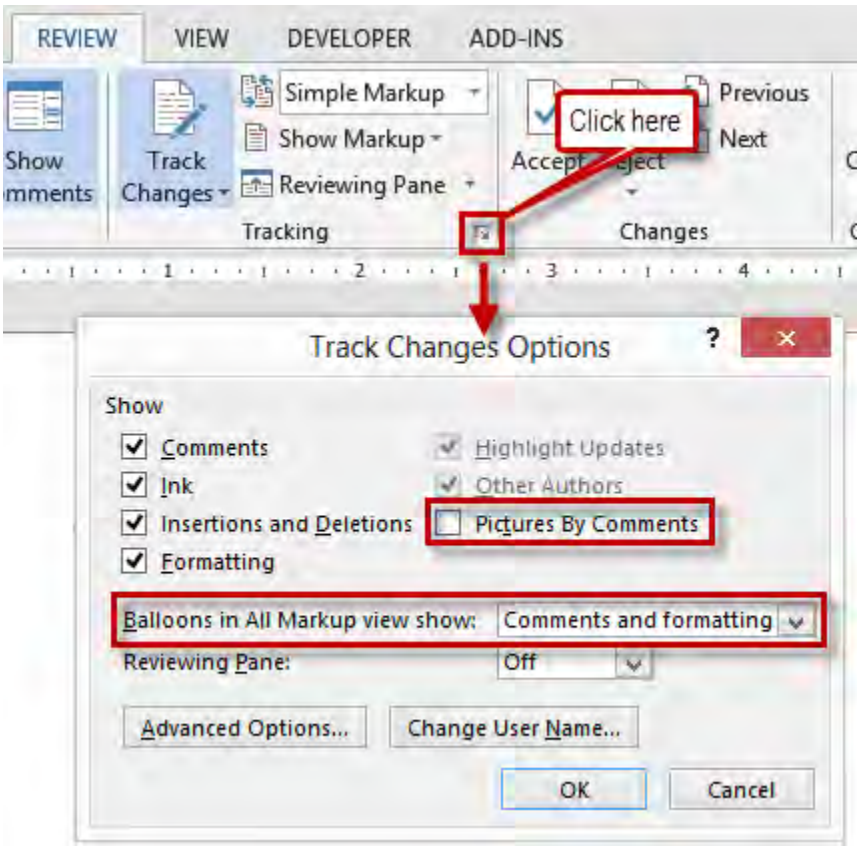


ii. **Track Changes Options**: In order to get to this dialog, click **Review ribbon | Tracking launcher**.

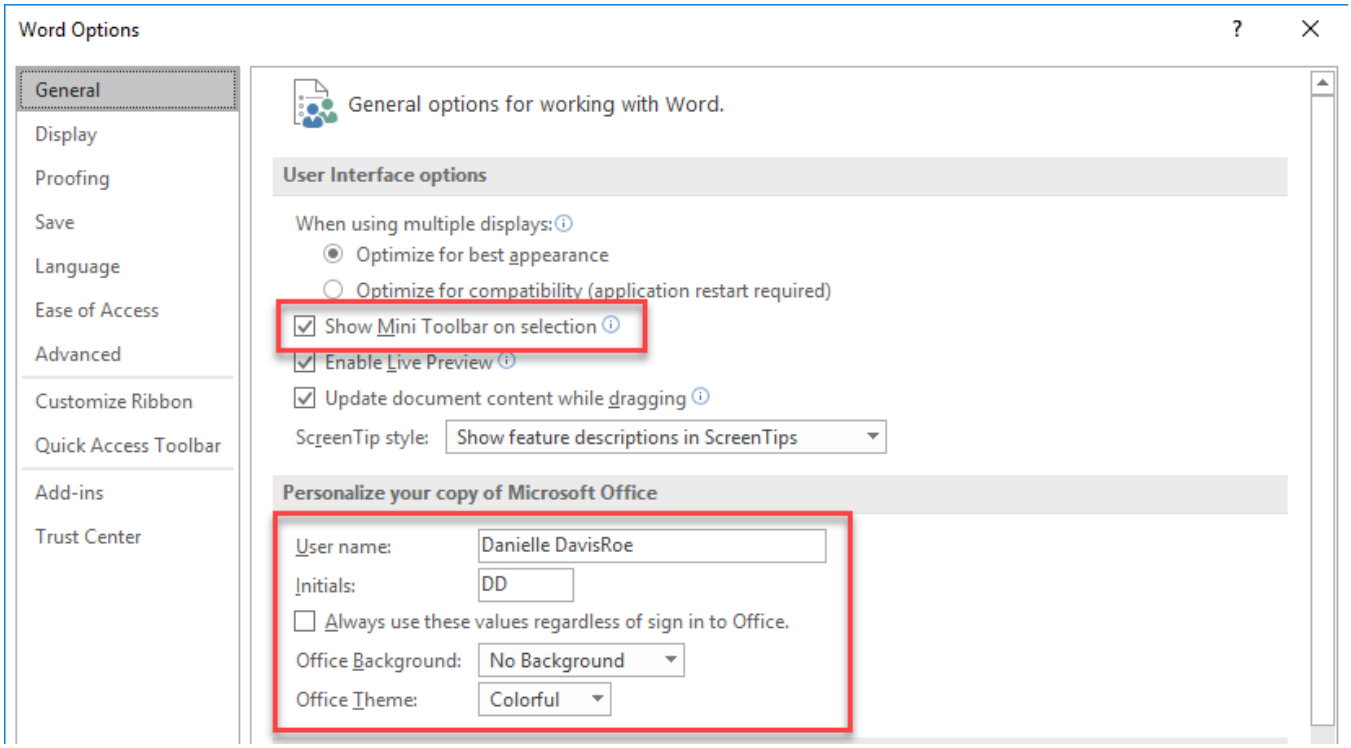


iii. Clear **Pictures By Comments** (unnecessary and clutters up the comment screen).

iv. **Balloons are best used for Comments and Formatting only**: not Revisions which is the default setting.

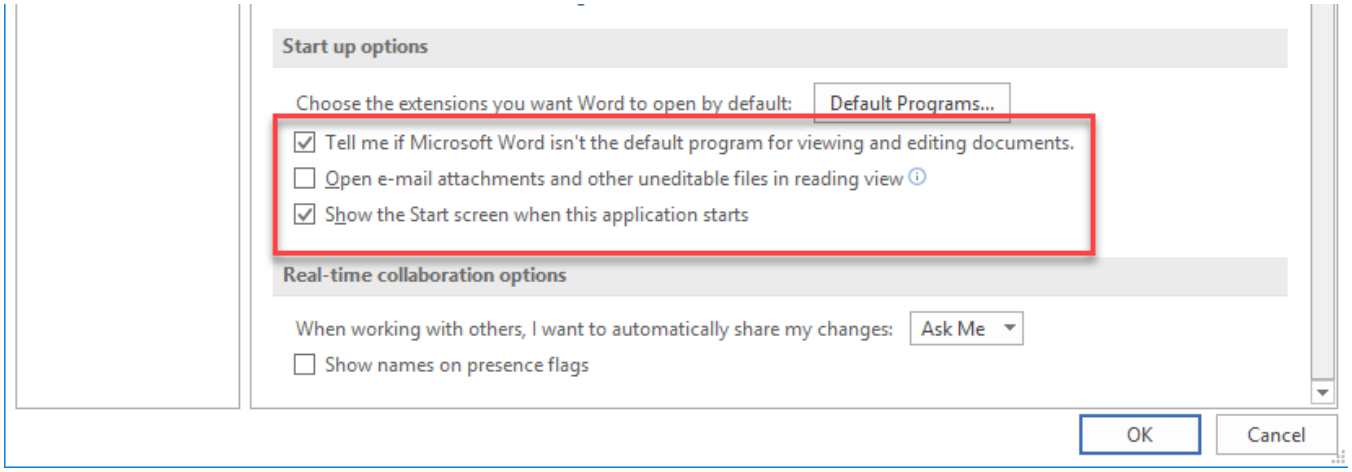
4. Default Setting Changes for Word 2019: **NOTE that you get to all of the following screens by clicking the File menu ➔ Options.**

A. **Options ➔ General**:



i. Uncheck **Show Mini Toolbar on selection**. This controls whether an additional pop up window with common font options is displayed whenever text is selected. This can be distracting and cover up part of the document. Therefore, uncheck this box.

ii. **Personalization**: Make sure your name and initials are in the **User name** and **Initials boxes**. Check **Always use these values…** and choose an **Office Background** and **Office Theme**. The background is the frankly silly graphic that appears at the top, right-hand corner of the Word screen. You had a chance to choose something during installation but you may want to change it now that you've seen it. The default Office Theme of stark, blinding white might not be what you would like. I recommend you change it to Colorful.

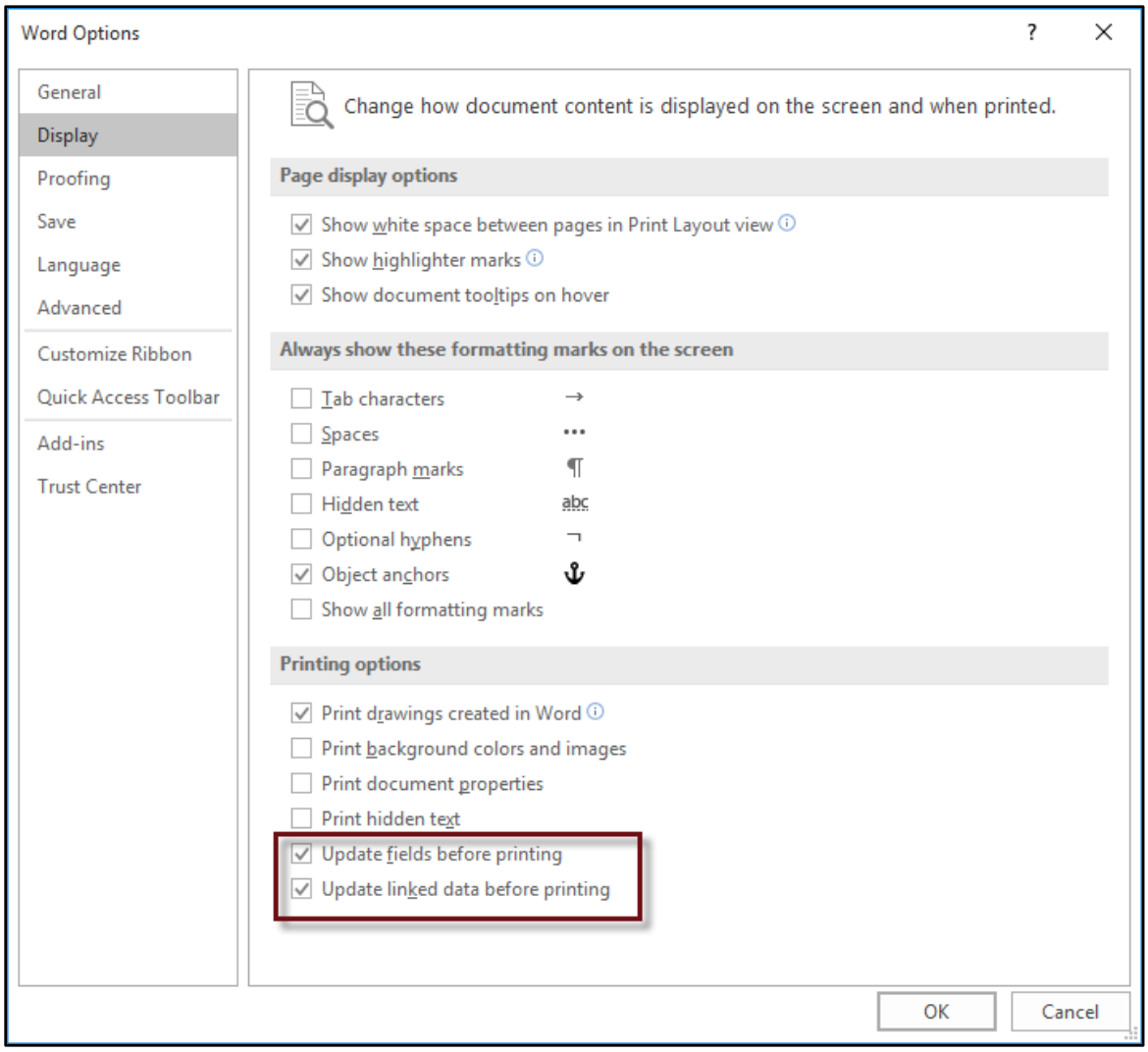


iii. **Tell me if Word isn't default program for viewing and editing documents**: This is just annoying, particularly if you just don't want Word to be your default.

iv. **Open e-mail attachments in Reading View**: Clear this so attachments open normally.

v. **Get Rid of the Start Screen**. This is the giant template selection screen that opens whenever you open Word. If you would prefer to go directly to a blank document when you open Word, clear the **Show the Start Screen when this application starts** box.

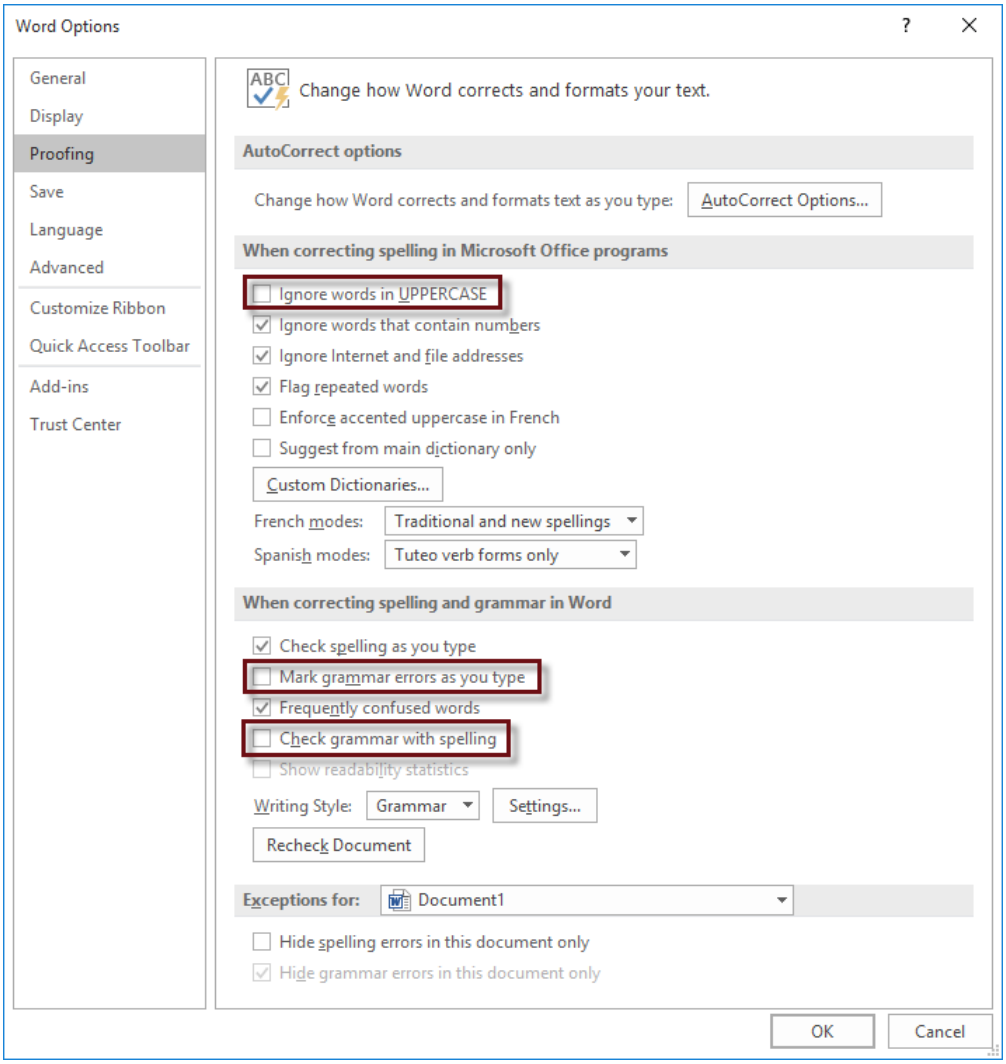
B. **Options ➔ Display**:



i. Check **Update fields before printing**. Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.

ii. Check **Update linked data before printing**. This will make sure that all linked files are updated before printing.

C. **Options ➔ Proofing**:

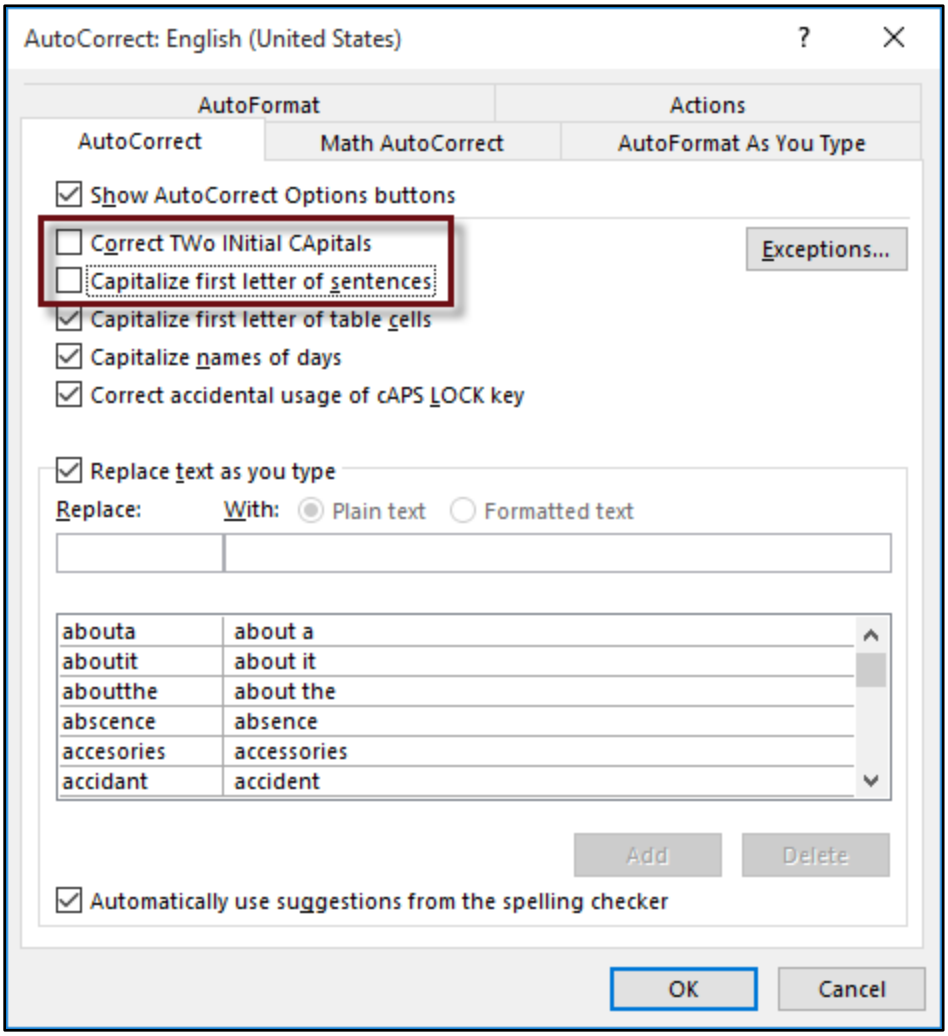


i. Uncheck **Ignore words in UPPERCASE**. Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.

ii. Uncheck **Mark grammar errors as you type**. This will eliminate the green squiggly lines in the document.

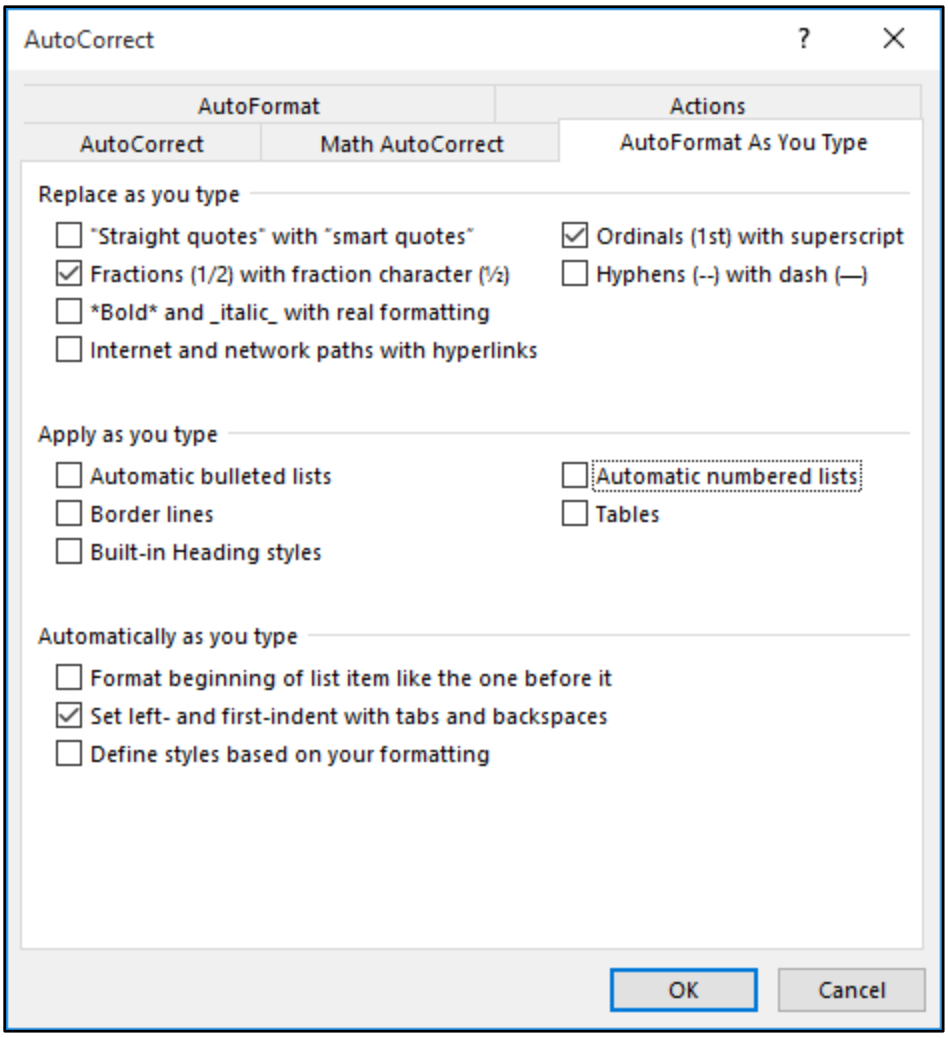
iii. Uncheck/Check **Check grammar with spelling**. Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

D. **Options ➔ Proofing and Autocorrect**: Next, go to **Proofing** and click on **Autocorrect Options** button. This will launch the **Autocorrect Options dialog**.



i. Uncheck **Correct TWo INitial CApitals** and **Capitalize first letter of sentences** as most people find that annoying because they MEANT to do it (IDs or cc:). **Note**: you can also delete the AutoCorrect entries in the list at the bottom of the dialog which replaces (c) with © and (r) with ®.

ii. Next click on the **AutoFormat As You Type** tab.



iii. Uncheck everything except **Ordinals**, **Fractions** and **Set left and first indent with tabs and backspaces**. Optional items include checking **Internet and network paths with hyperlinks** will create clickable hyperlinks to internet addresses, so that a person opening the document can click on the link and go to the web address right from the document. You might also check the **Straight quotes with smart quotes** but keep in mind that this may result in your quotation marks getting converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

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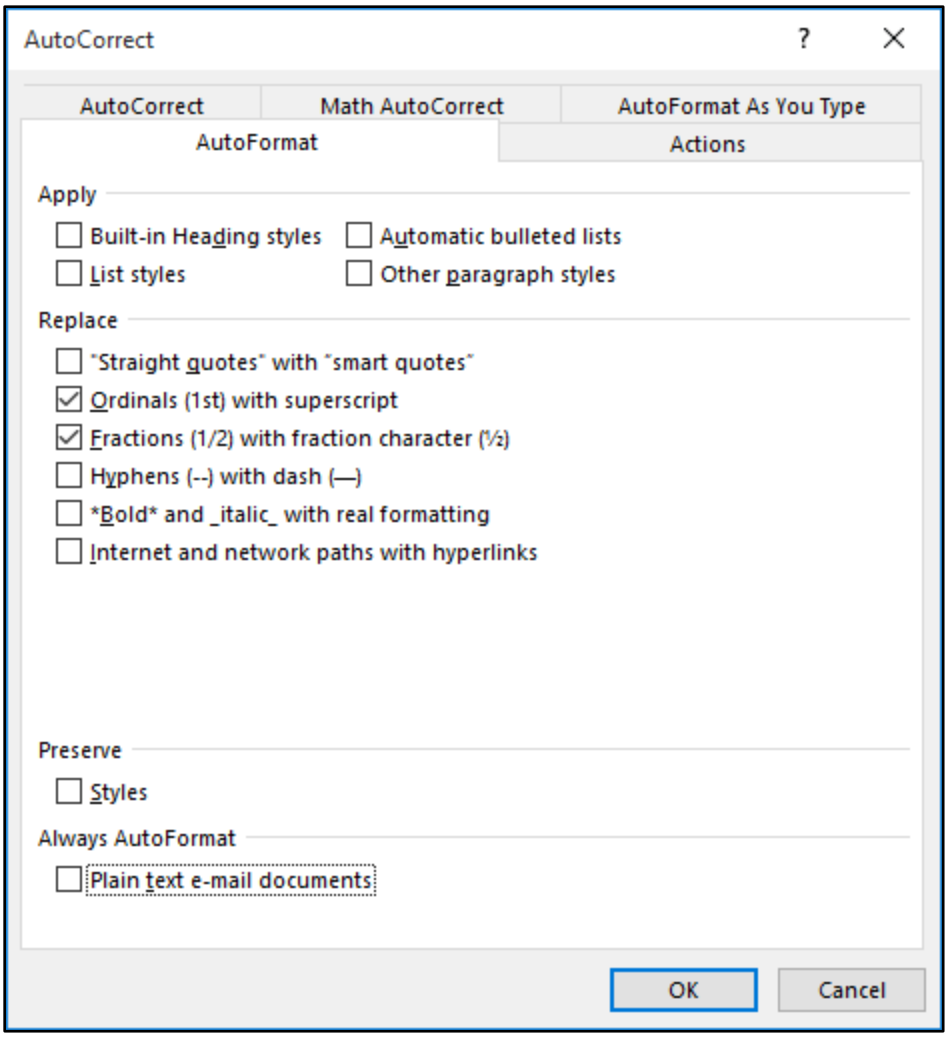
v. Finally, click on the **AutoFormat tab**.



vi. Make these options match the **AutoFormat As You Type options**.

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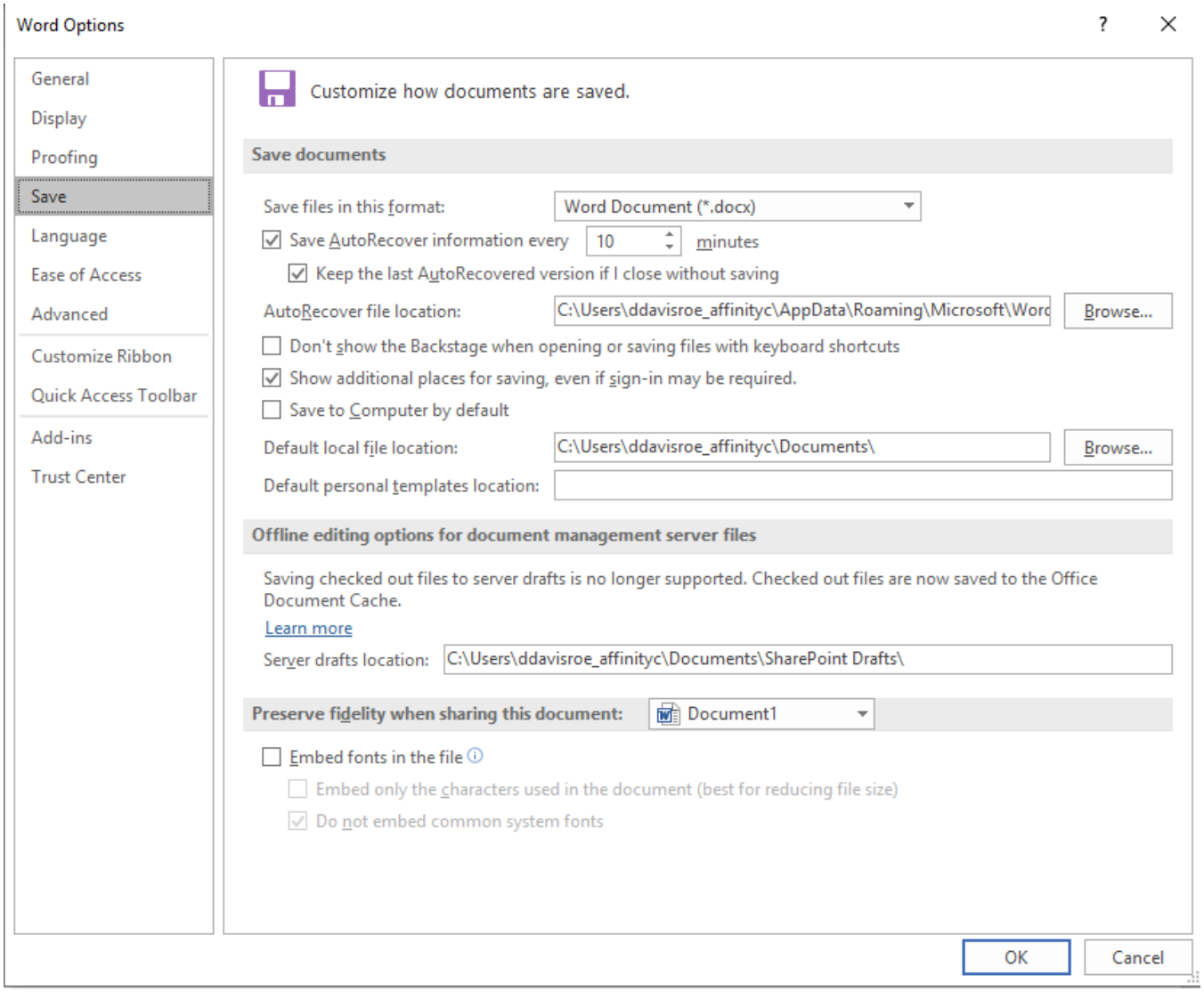
E. **Options ➔ Save**:



i. **Save AutoRecover information**: Reduce this to **5 minutes** rather than 10 minutes. More frequency is a good thing.

ii. **Don't show the Backstage when opening or saving files with keyboard shortcuts**: If you want Word to go directly to the open or save browse screens when you open or save a file using keyboard shortcuts (Ctrl + O and Ctrl + N), then check this box. There is no longer a setting to go directly to the open or save browse screens when clicking on the File menu.

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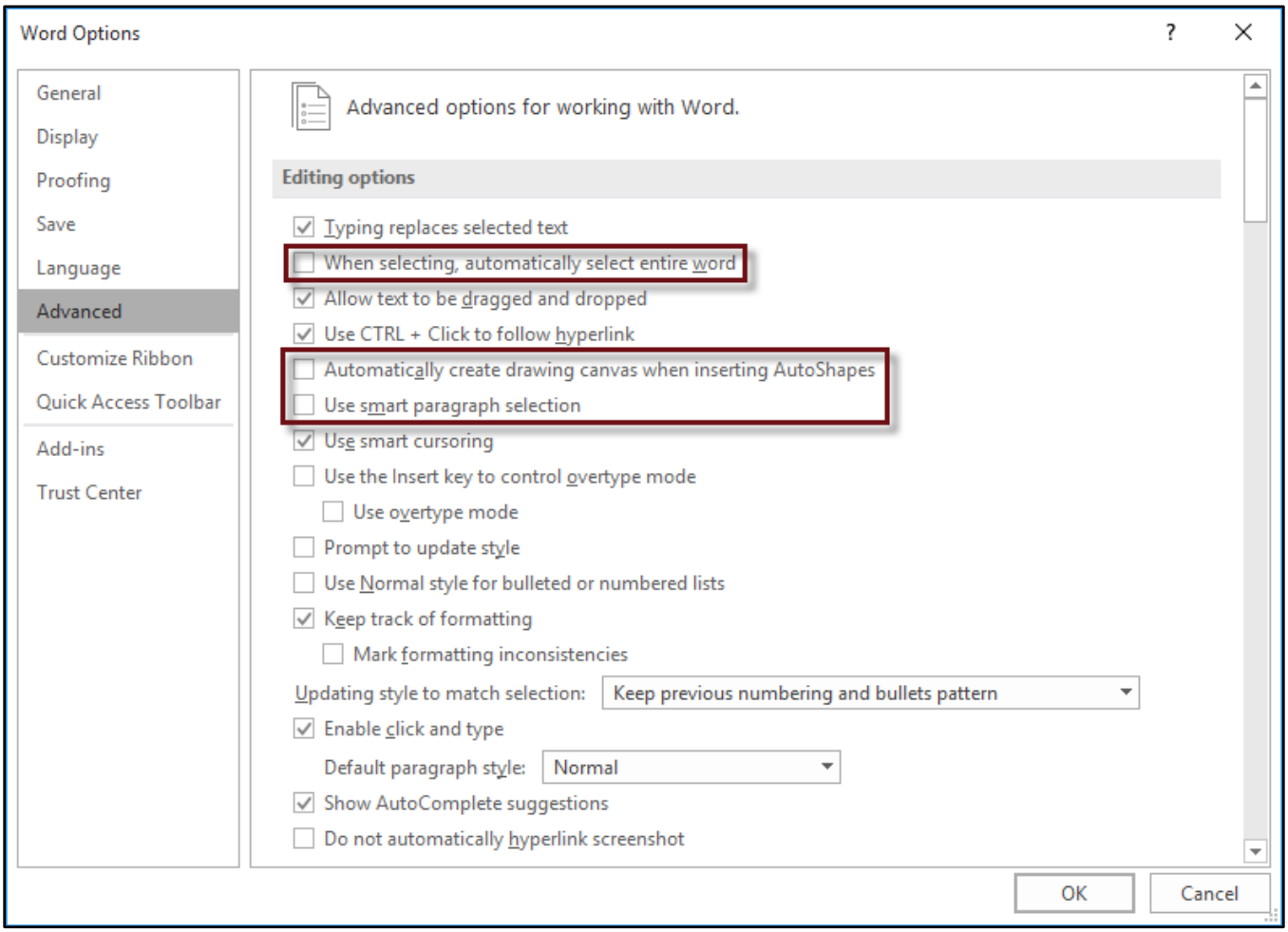

i. Uncheck **When selecting, automatically select entire word.** Regain control over your mouse.

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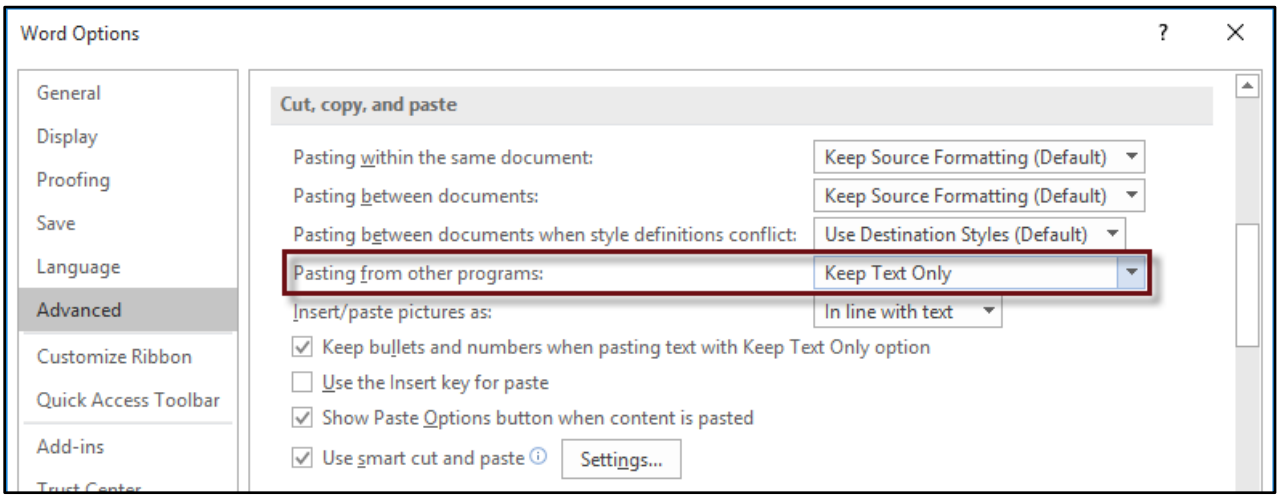
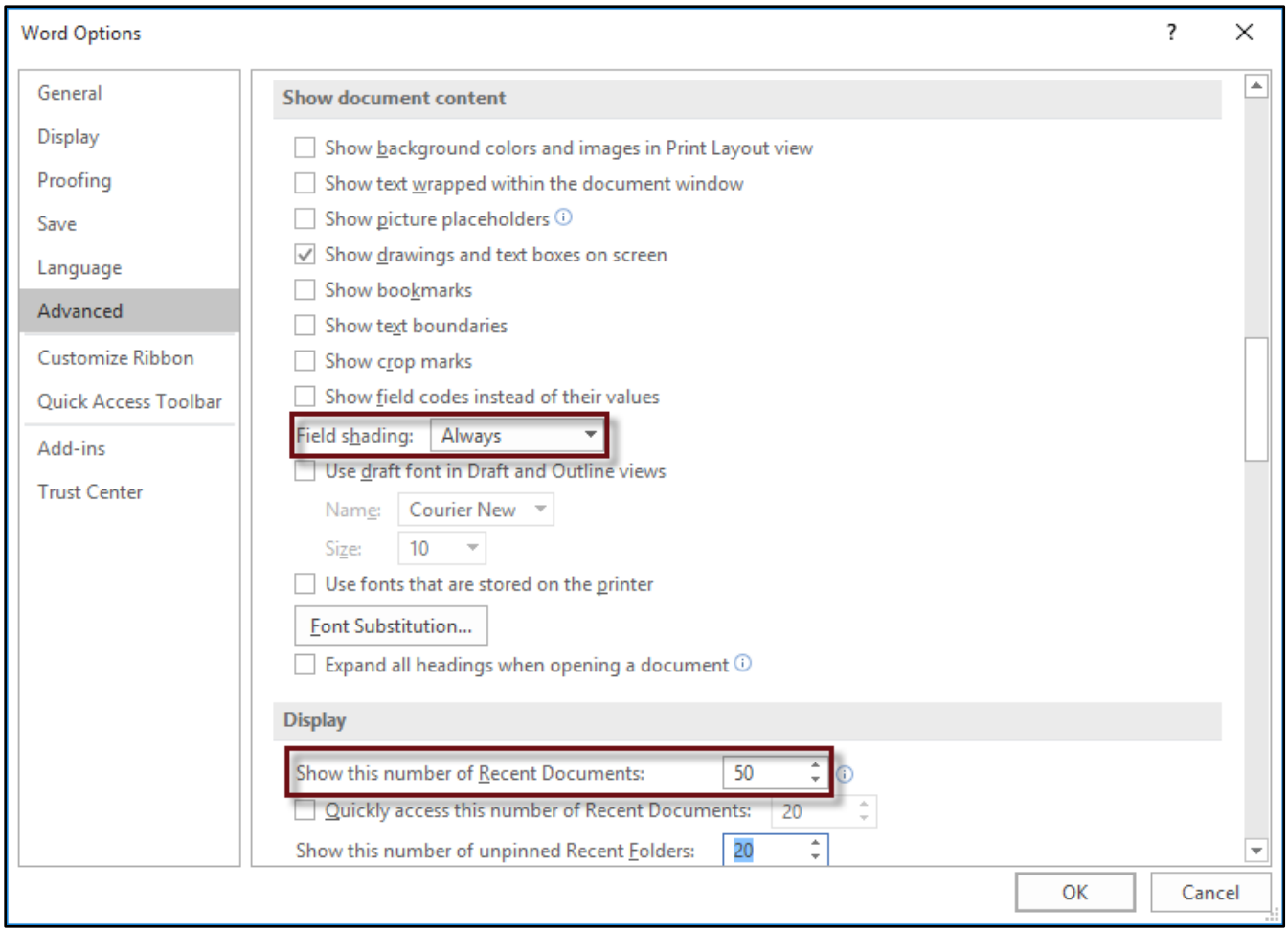
vi. **Use smart cursoring** moves the cursor when you scroll up or down through the document, this may or may not be what you want

vii. **Enable click and type,** in print layout, will format itself to place the text where you double click.

G. **Options ➔ Advanced ➔Cut, Copy and Paste**: Note that in this area you can control the default paste action in a variety of circumstances. When copying from other programs (such as a browser), we recommend that you strip all formatting off of the source text. By changing the setting shown below, this will always be the case. You may want to change some of the other settings as well depending upon how you work.



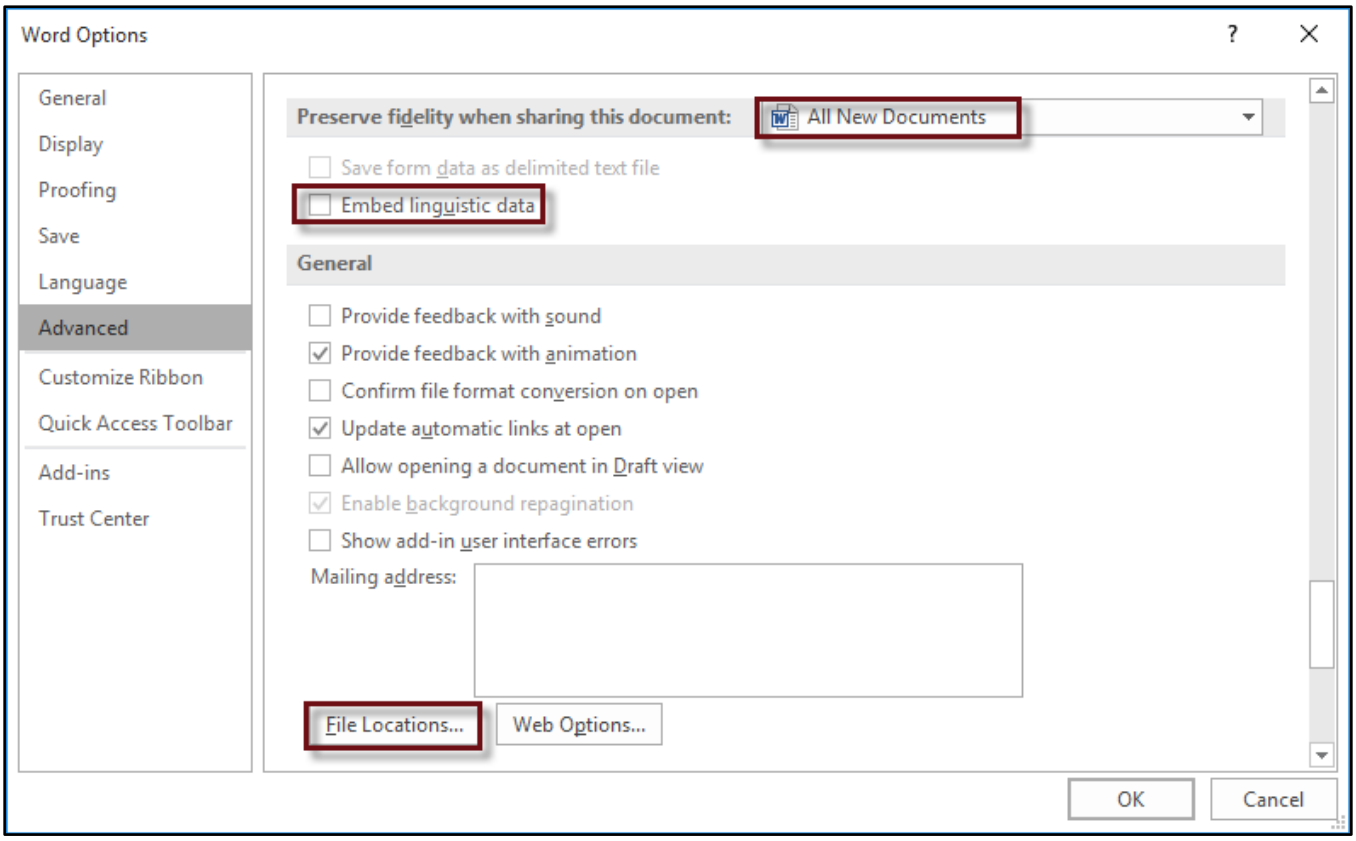
H. **Options ➔ Advanced ➔ Show Document Content**:



i. Change **Field shading** to **Always**.

ii. Change **Show this number of Recent Documents** to your preference.

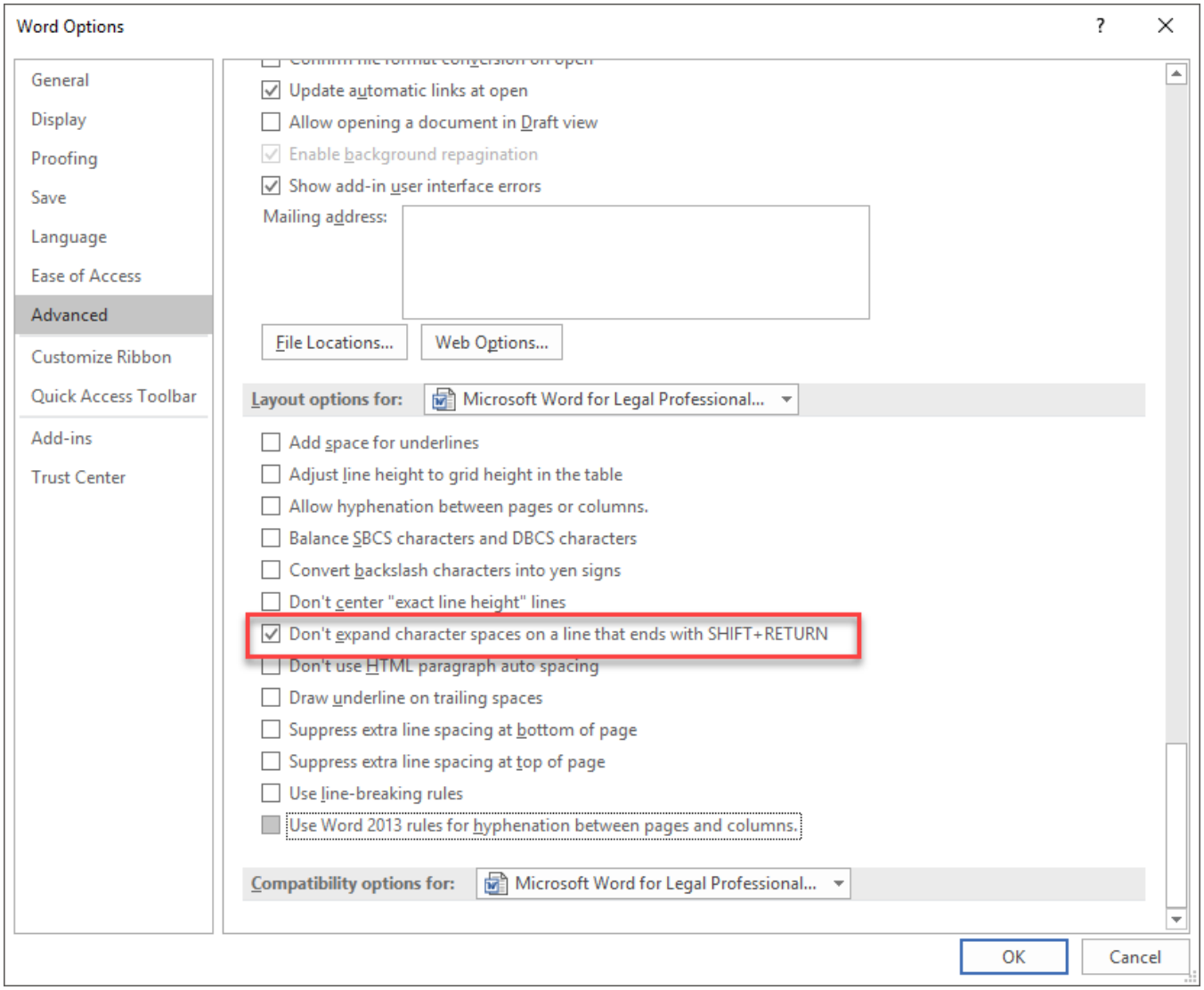
l. **Options ➔ Advanced ➔ Fidelity & General**:



i. Change the heading in **Preserve fidelity when sharing this document** to A**ll New Documents** (so the setting change applies to all future documents) and clear the **Embed linguistic data** box. "Linguistic data" refers to things like speech (from text-to-speech or speech-to-text applications or add-ins) and handwriting. You're probably not using either of those things so embedding them only makes the file-sizes bigger (unnecessarily).

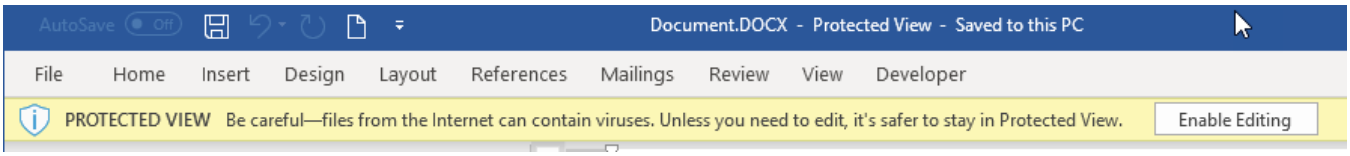
ii. Click **File Locations** and make sure that Word is defaulted to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.

J. **Options ➔ Advanced ➔ Layout Options**:



Check **Don't expand character spaces on a line that ends with SHIFT-RETURN** because this is the number one reason that a few words will be spread across the entire line with giant gaps between each word. For your information, Shift + Return = "soft return" which tricks Word into thinking that what appears to be two lines of text are actually one line of text.

K. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Protected View**: By default Protected View is enabled. When enabled, Word displays a warning if the Word document was created on a different system. While the warning is displayed, the file may only be viewed, not edited. To edit the document, you must click the **Enable Editing button**.



i. Protected View disables all of the active content in the document and reduces the risk of infection from a worm, virus, or other malware that could be embedded in an unknown document.

ii. If protected view bothers you, you may disable it. Yes, there is risk involved in disabling it. ***You should check with your system administrator prior to unchecking these boxes***. To change these settings, go to **Protected View** and uncheck one or all of the boxes. See **Error! Reference source not found.**.

iii. These boxes enable protected view, unchecking them disables the protection.

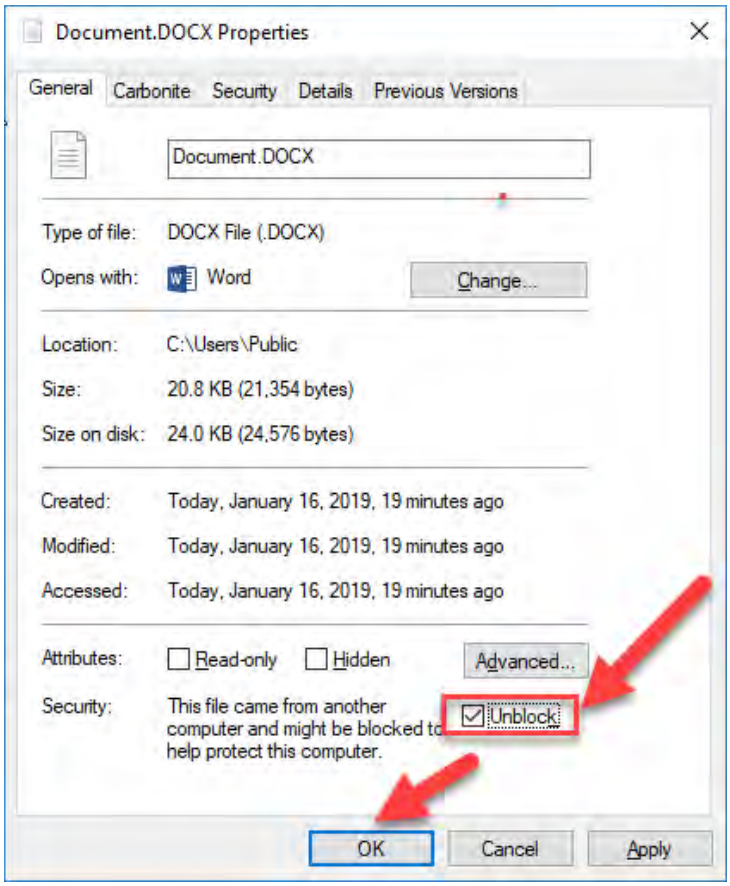
iv. **Enable Protected View for files originating from the Internet.** This should probably remain checked. If you download a Word document from a web page, or anywhere else from the internet, you will probably want the Protected View protection.

v. **Enable Protected View for files located in potentially unsafe locations.** This is the main cause of triggering Protected View when opening a file from a network folder. You may disable this, but you may want to make your network server a "Trusted Location" instead. (See Trusted Location, below.) Unchecking this box also disables Protected View from other locations, such as USB thumb drives.

vi. **Enable Protected View for Outlook attachments.** With this checked, you will receive a protected view warning for every Word document that you open as an attachment from Outlook. Unchecking this box turns off the protection.

vii. **NOTE:** In addition to these settings, Windows may "block" Outlook attachments that you save to your file system. To unblock them, you must right-click the file,

select **Properties**, check the **Unblock box** (on some systems this appears as a button instead of a checkbox), and click **OK**:

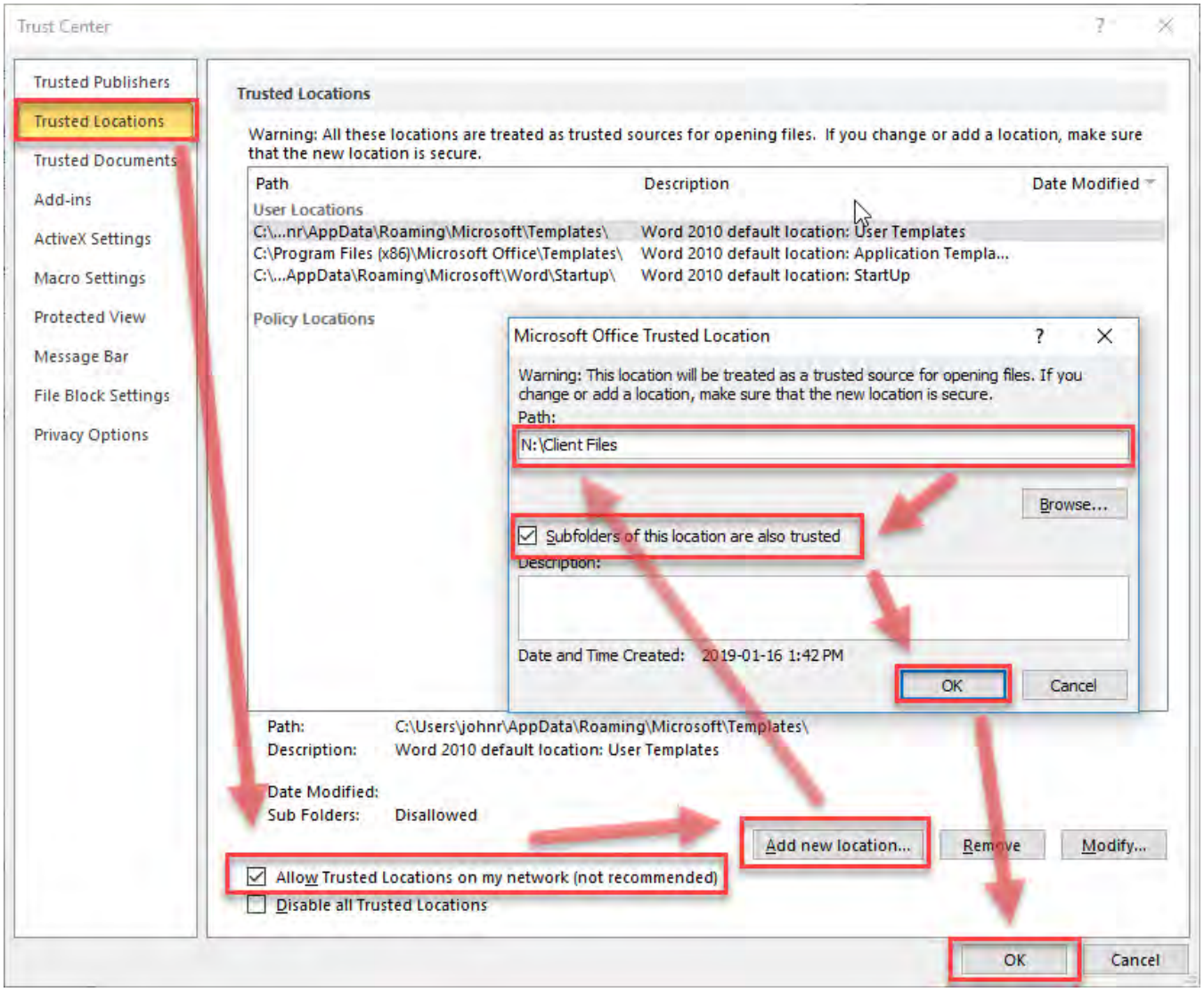


L. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Trusted Locations**: Trusted Locations are for folders on your system or on your network that you trust. Adding a folder or network share as a Trusted Location completely disables all of the Trust Center checks and protections for that location. To add a folder such as "N:\Client Files" as Trusted Location:

i. Go to File ➔ Options ➔ Trust Center ➔ Trust Center Settings ➔ Trusted Locations.

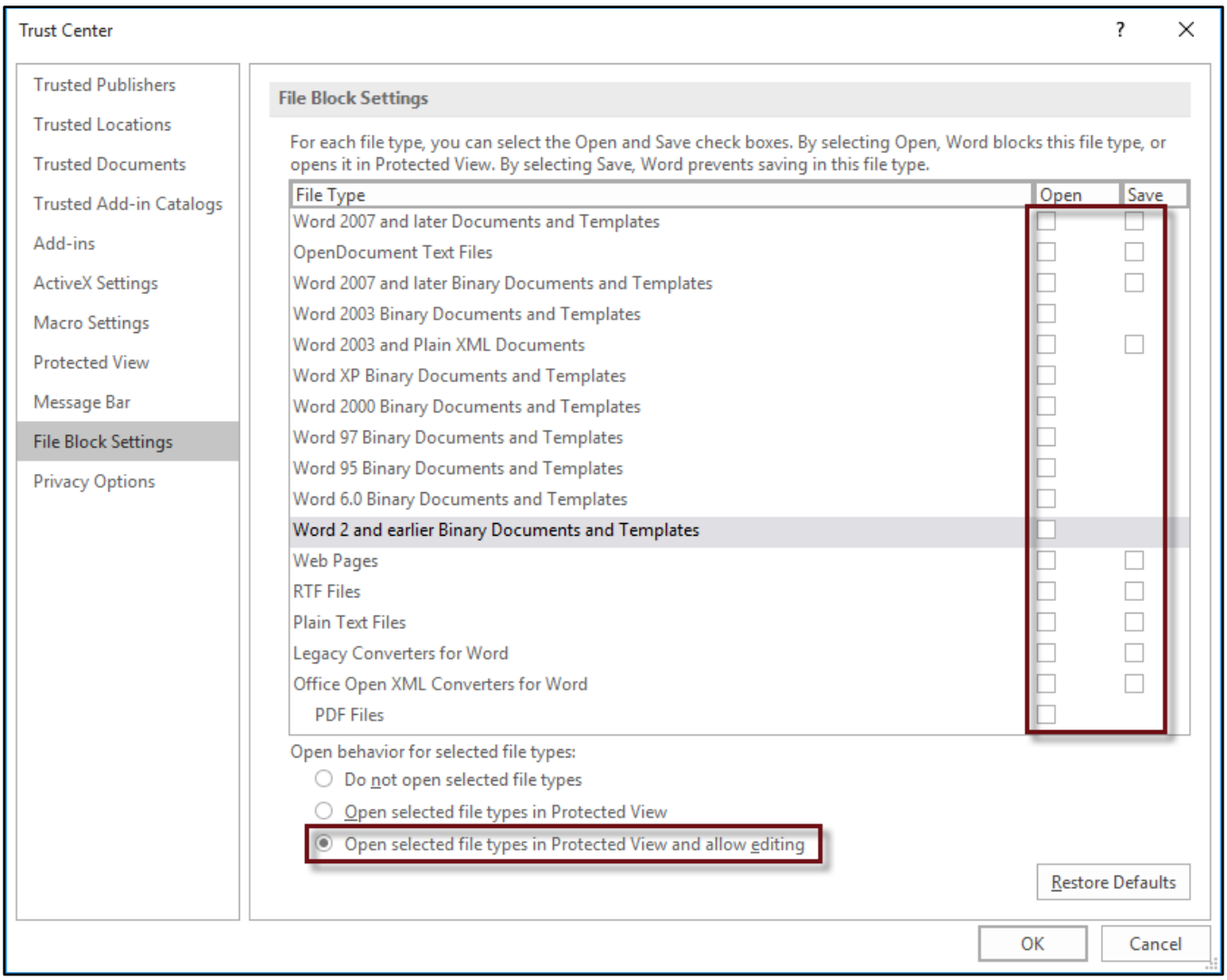
ii. Check the **Allow Trusted Locations on my network**. You will not be able to enter a network location without checking this box.

iii. Click **Add new location**, enter the path of the folder and check **Subfolders of this location are also trusted**. Then click **OK** and **OK**. All documents in that folder will now be trusted, and the Trust Center will no longer check them.

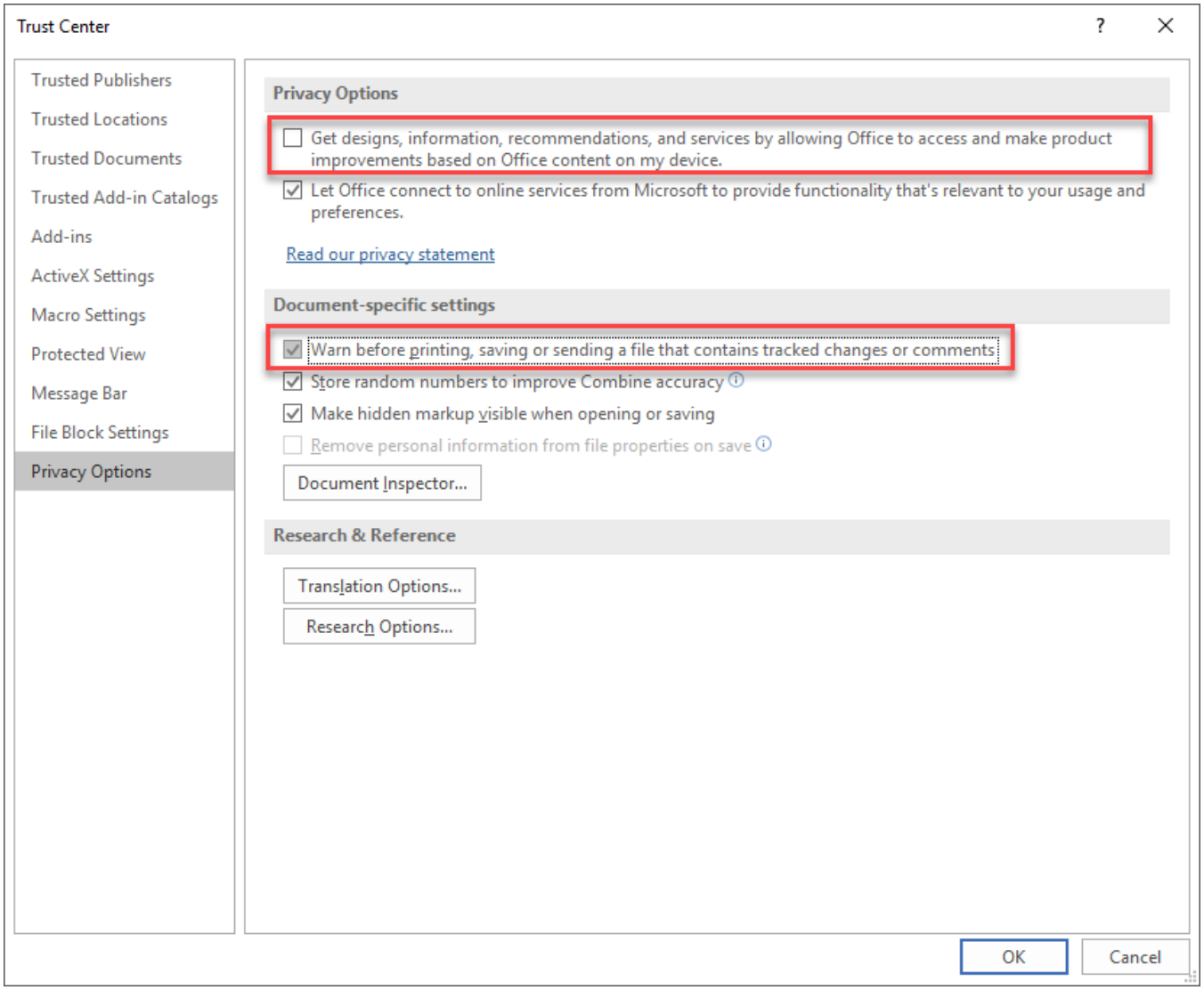


M. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ File Block Settings**: File Block Settings will trigger Protected View for all files of a particular type regardless of where they are located. Again, there is risk involved in disabling this feature. ***Check with your system administrator before unchecking these boxes***. In particular, there have been prior issues with RTF files.

To have all file types open and allow editing without a prompt, under the **File Block Settings**, uncheck all of the check boxes and under **Open behavior for selected filed types**, select **Open selected file types in Protected View and allow editing**. See **Error! R eference source not found.**


Trust Center
Trusted Publishers
Trusted Locations
Trusted Documents
Trusted Add-in Catalogs
Add-ins
ActiveX Settings
Macro Settings
Protected View
Message Bar
File Block Settings
Privacy Options
File Block Settings
For each file type, you can select the Open and Save check boxes. By selecting Open, Word blocks this file type, or opens it in Protected View. By selecting Save, Word prevents saving in this file type.
File Type
Open
Save
Word 2007 and later Documents and Templates
OpenDocument Text Files
Word 2007 and later Binary Documents and Templates
Word 2003 Binary Documents and Templates
Word 2003 and Plain XML Documents
Word XP Binary Documents and Templates
Word 2000 Binary Documents and Templates
Word 97 Binary Documents and Templates
Word 95 Binary Documents and Templates
Word 6.0 Binary Documents and Templates
Word 2 and earlier Binary Documents and Templates
Web Pages
RTF Files
Plain Text Files
Legacy Converters for Word
Office Open XML Converters for Word
PDF Files
Open behavior for selected file types:
Do not open selected file types
Open selected file types in Protected View
Open selected file types in Protected View and allow editing
Restore Defaults
OK
Cancel

N. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Privacy Options**:

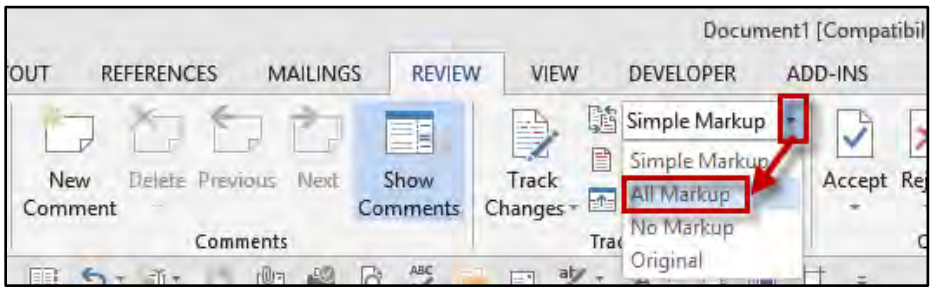


Go to the **Trust Center** and click the **Trust Center Settings button**. A new dialog will open. Click on **Privacy Options** and check **Warn before printing, saving or sending a file that contains tracked changes or comments**. Also clear the **Send personal information to Microsoft to make improvements to Office**.

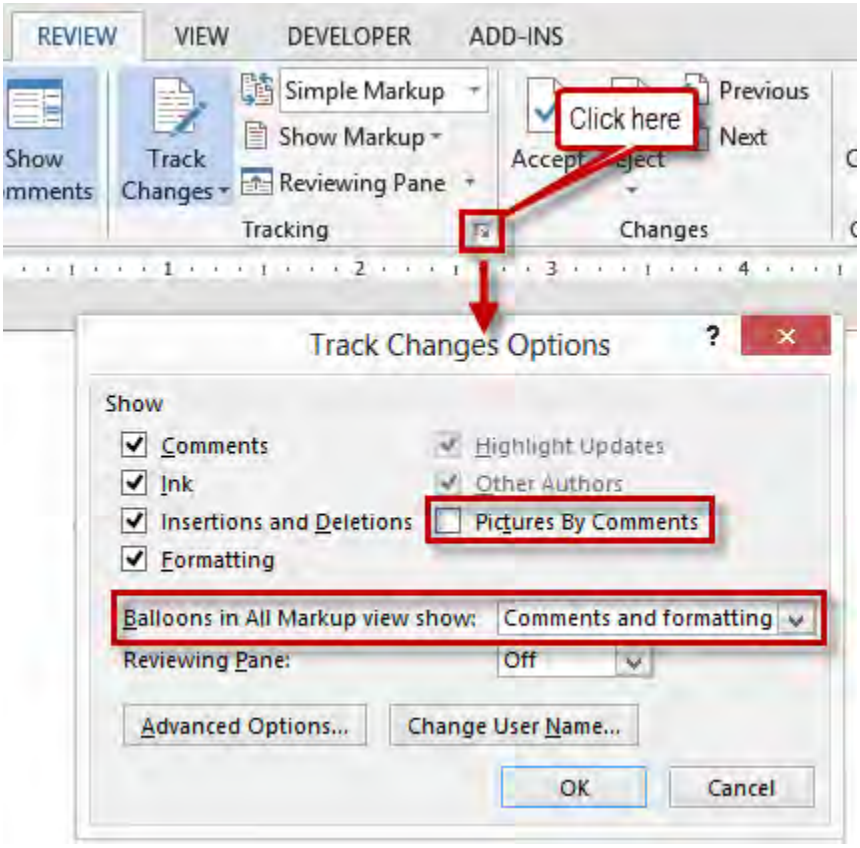
O. **Lock In Your Setting Changes**: Make sure that after you're doing with all of the foregoing changes that you click the **OK** button, **NOT Cancel** and **NOT** the **X button** in the top, right-hand corner of the dialog. That makes the changes stick. It's a good idea after you do this to exit Word, re-launch Word and spot check a couple of the settings to ensure that they're still modified. If the changes don't stick, there are a couple of reasons that could happen and I can help you figure out why. Just send me an email - info@affinityconsulting.com.

P. **Fix Track Changes Settings**: There are a few changes you'll want to make to the Track Changes defaults. All of these changes begin on the **Review ribbon** in Word 2016.

i. **Change the Markup**: By default, Word shows you **Simple Markup** which means that if you delete text, it literally disappears and a little red, vertical line appears in the left margin adjacent to the line where something was deleted. Of course, I not only want to know that something was deleted, but *what* was deleted. Therefore, switch from **Simple Markup** to **All Markup** (see below).



ii. **Track Changes Options**: In order to get to this dialog, click **Review ribbon | Tracking launcher**.

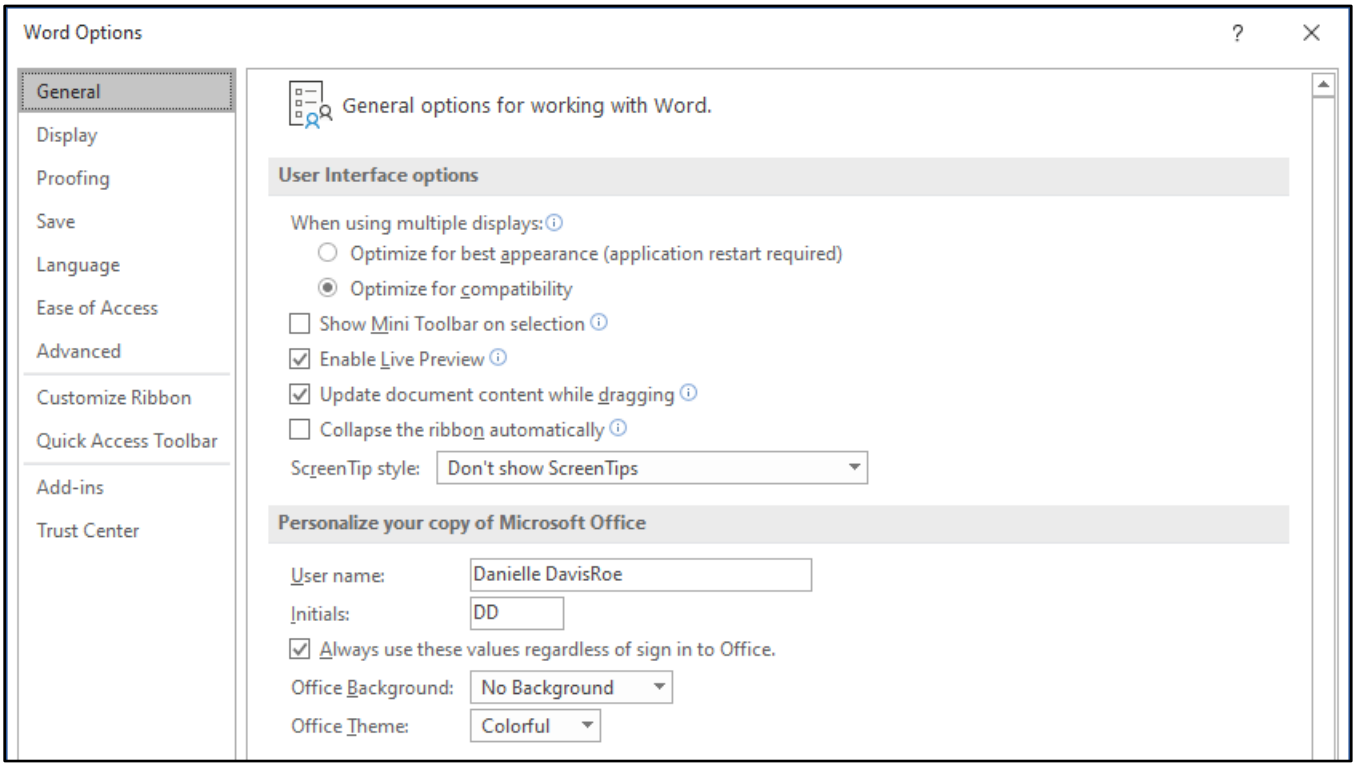


iii. Clear **Pictures By Comments** (unnecessary and clutters up the comment screen).

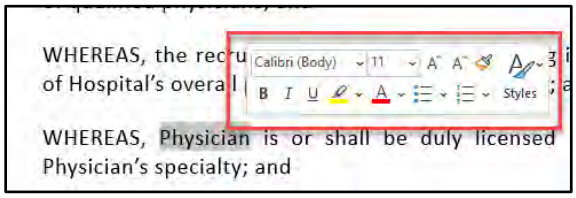
iv. **Balloons are best used for Comments and Formatting only**: not Revisions which is the default setting.

5. Default Setting Changes for Word for Office 365: **NOTE** that you get to all of the following screens by clicking the **File menu ➔ Options button.**

A. **Options ➔ General**:

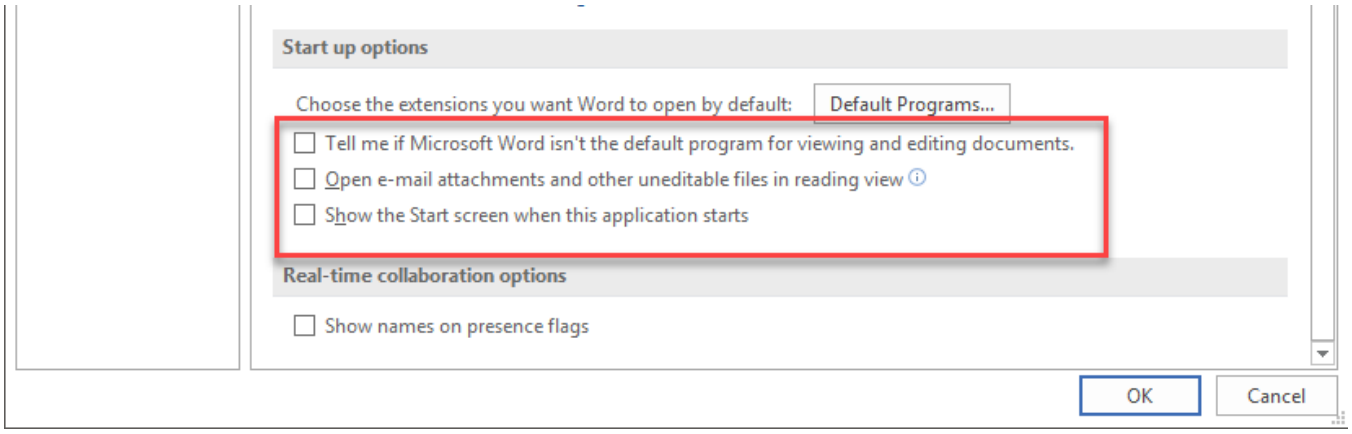


i. **Show Mini Toolbar on selection**: This controls whether the mini toolbar appears when selecting text. Uncheck this box to prevent the mini toolbar from popping up and covering part of the document.



ii. Make sure your name and initials are in the **User name** and **Initials boxes**. Check **Always use these values…** and choose an **Office Background** and **Office Theme**. The background is the frankly silly graphic that appears at the top, right-hand corner of the Word screen. You had a chance to choose something during installation but you may want to change it now that you've seen it. The default

Office Theme of stark, blinding white might not be what you would like. I recommend you change it to Colorful.

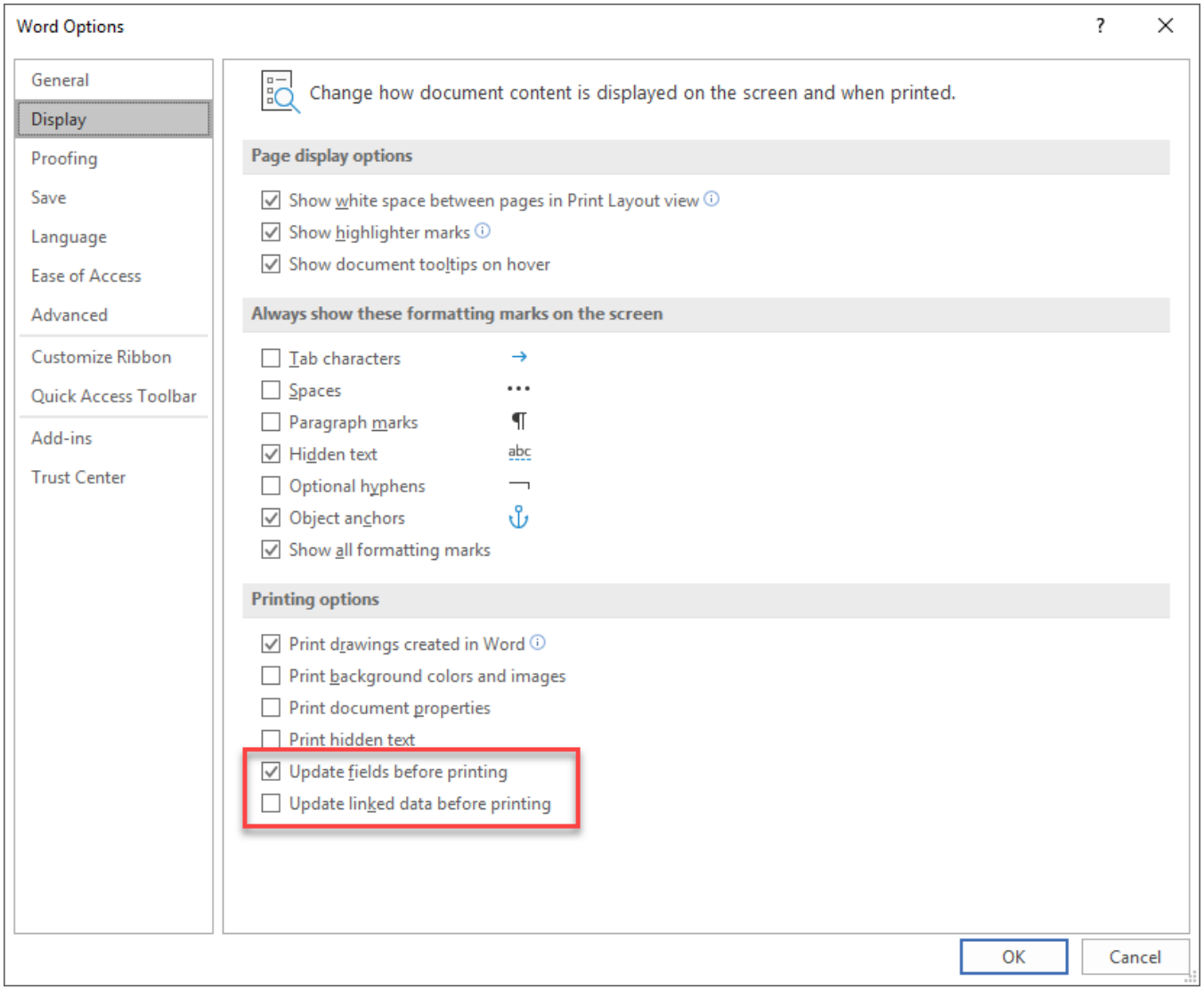


iii. **Tell me if Word isn't default program for viewing and editing documents**: This is just annoying, particularly if you just don't want Word to be your default.

iv. **Open e-mail attachments in Reading View**: Clear this so attachments open normally.

v. **Get Rid of the Start Screen**. This is the giant template selection screen that opens whenever you open Word. If you would prefer to go directly to a blank document when you open Word, clear the **Show the Start Screen when this application starts** box.

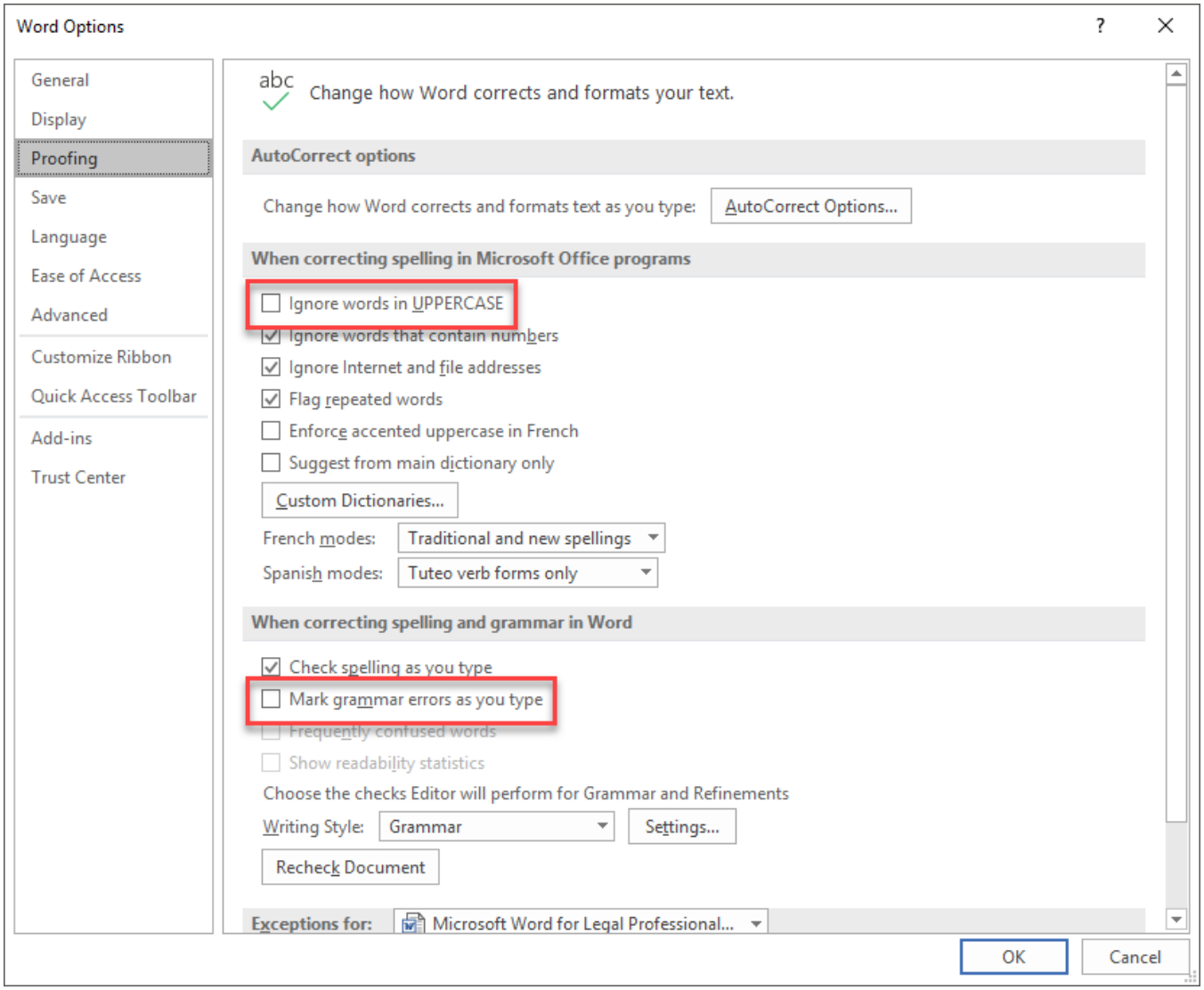
B. **Options ➔ Display**:



i. Check **Update fields before printing**. Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.

ii. Check **Update linked data before printing**. This will make sure that all linked files are updated before printing.

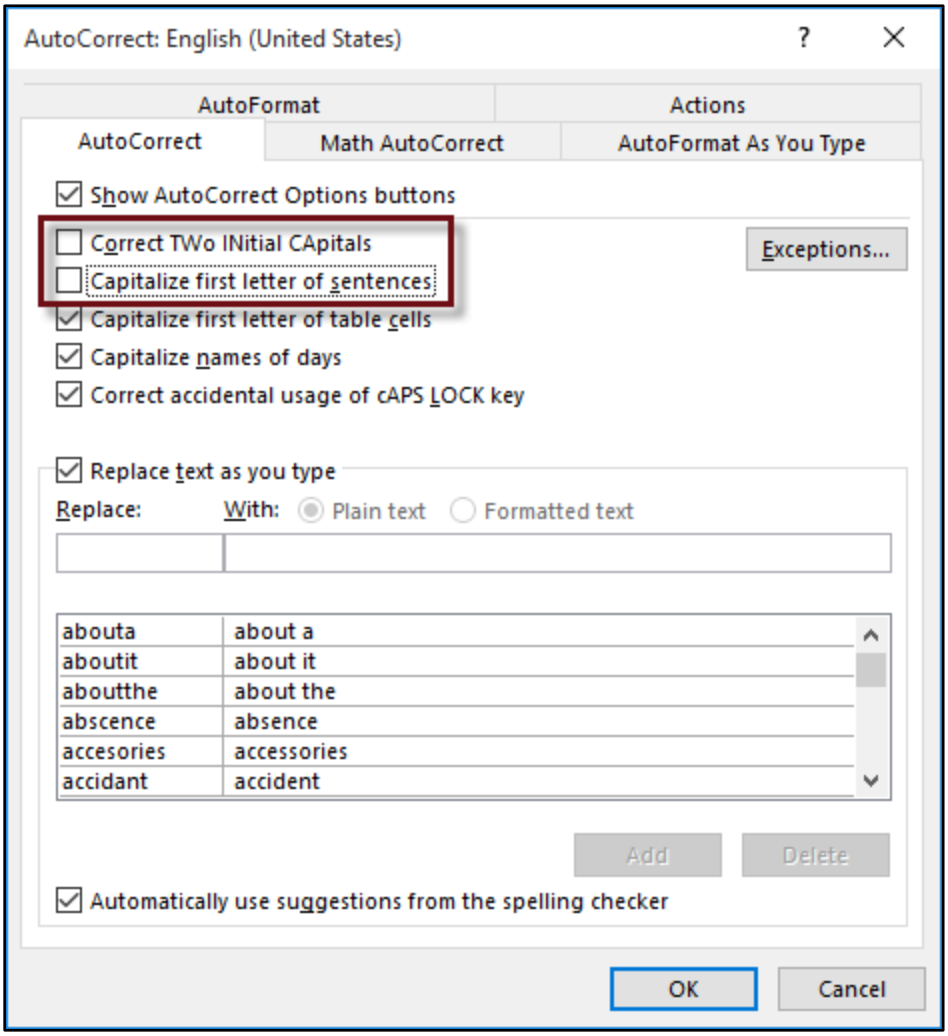
C. **Options ➔ Proofing**:



i. Uncheck **Ignore words in UPPERCASE**. Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.

ii. Uncheck **Mark grammar errors as you type**. This will eliminate the green squiggly lines in the document.

D. **Options ➔ Proofing and Autocorrect**: Next, go to **Proofing** and click on **Autocorrect Options** button. This will launch the **Autocorrect Options dialog**.



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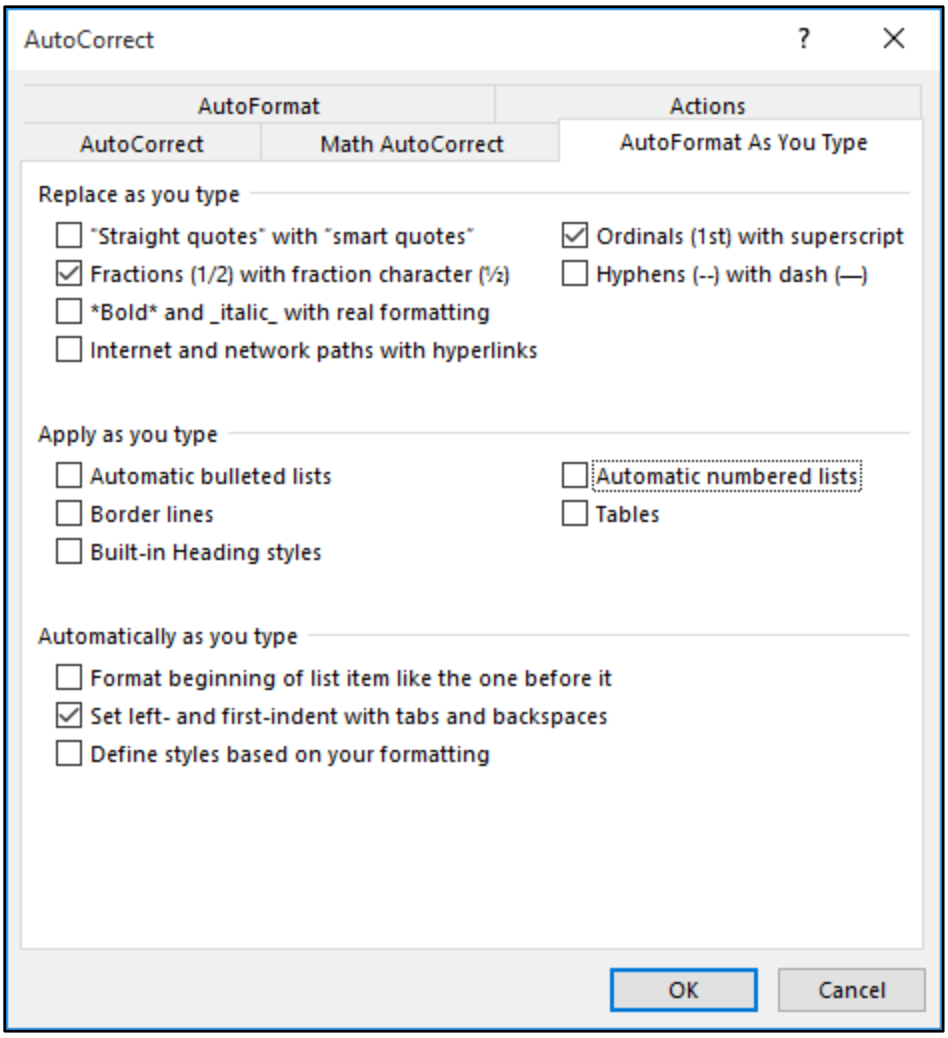

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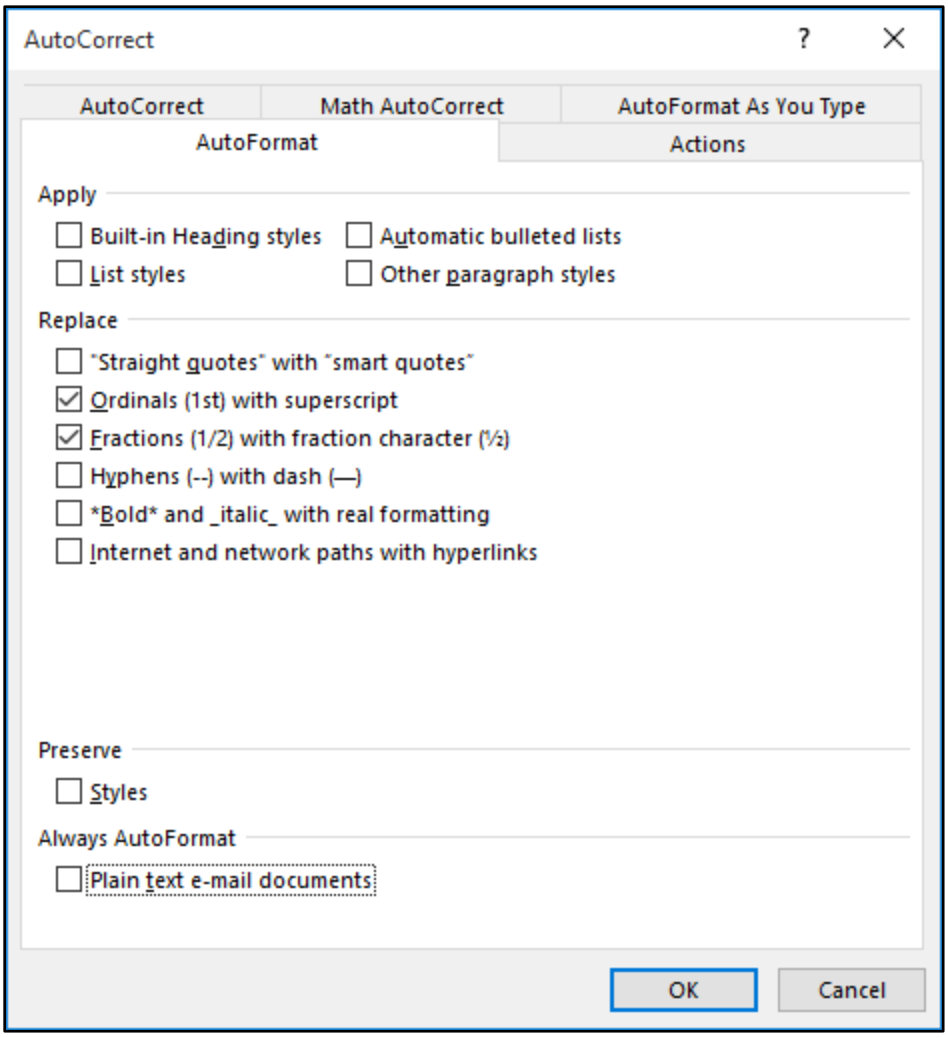

vi. Make these options match the **AutoFormat As You Type options**.

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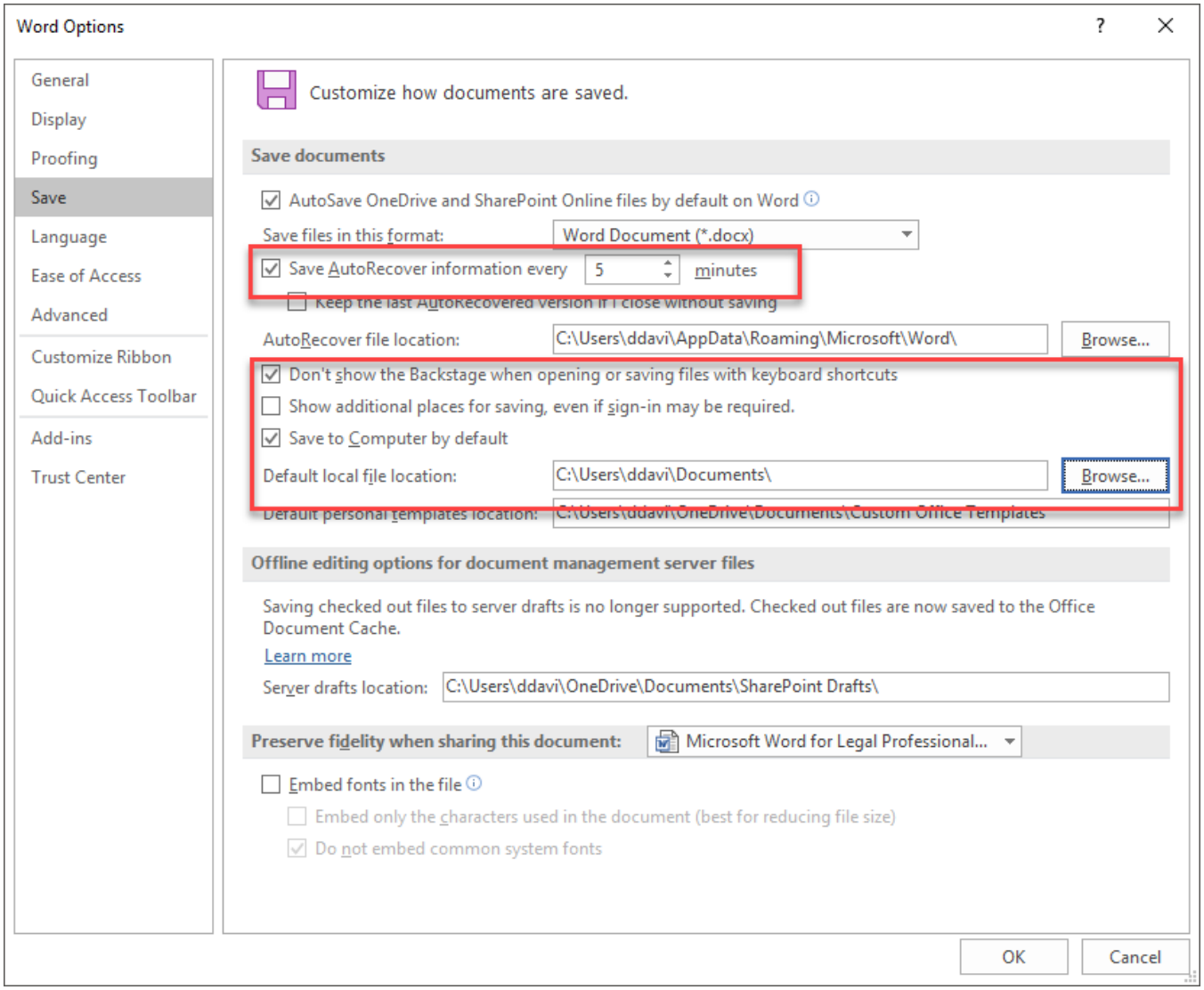

i. **Save AutoRecover information**: Reduce this to **5 minutes** rather than 10 minutes. More frequency is a good thing.

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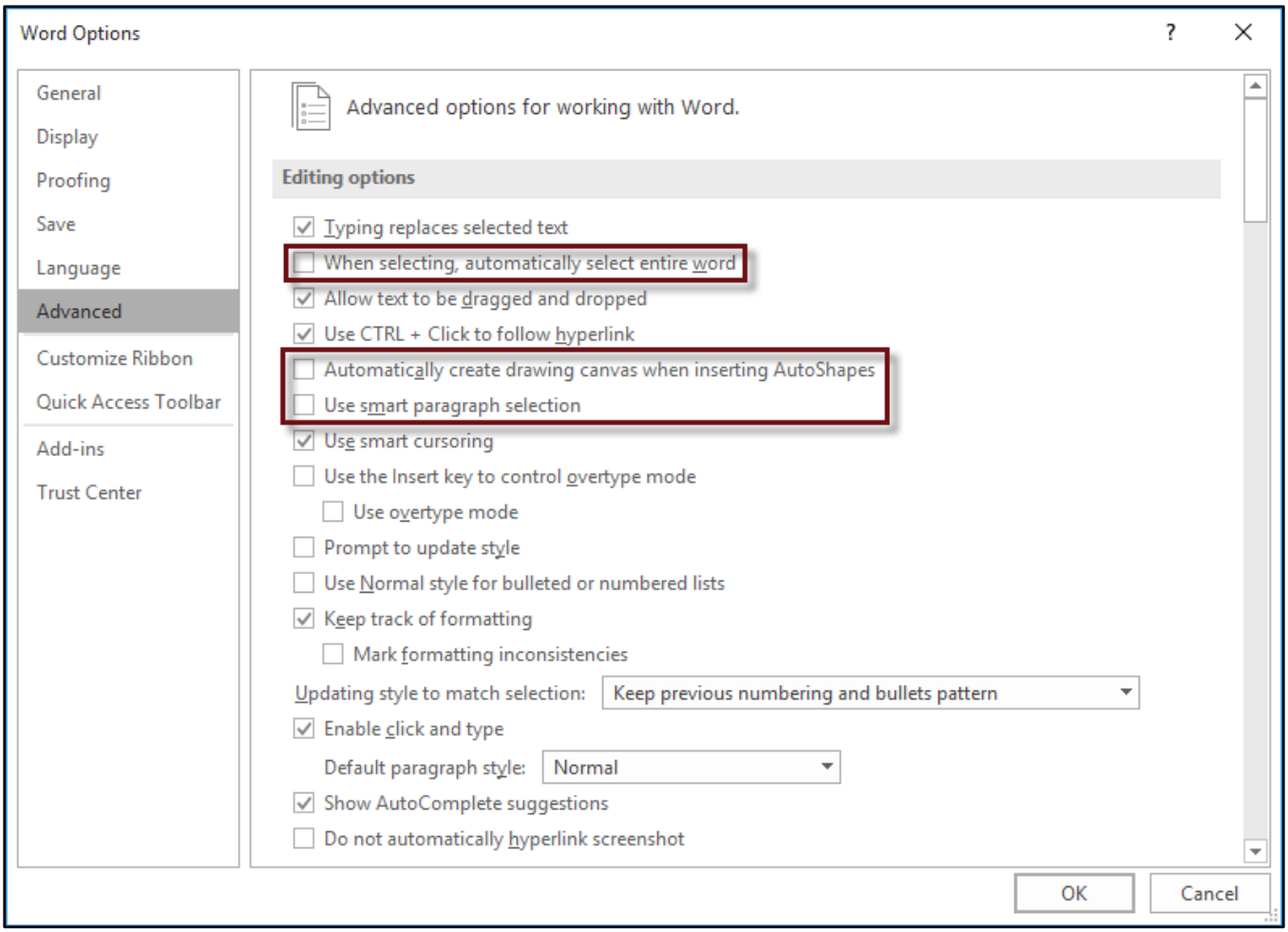

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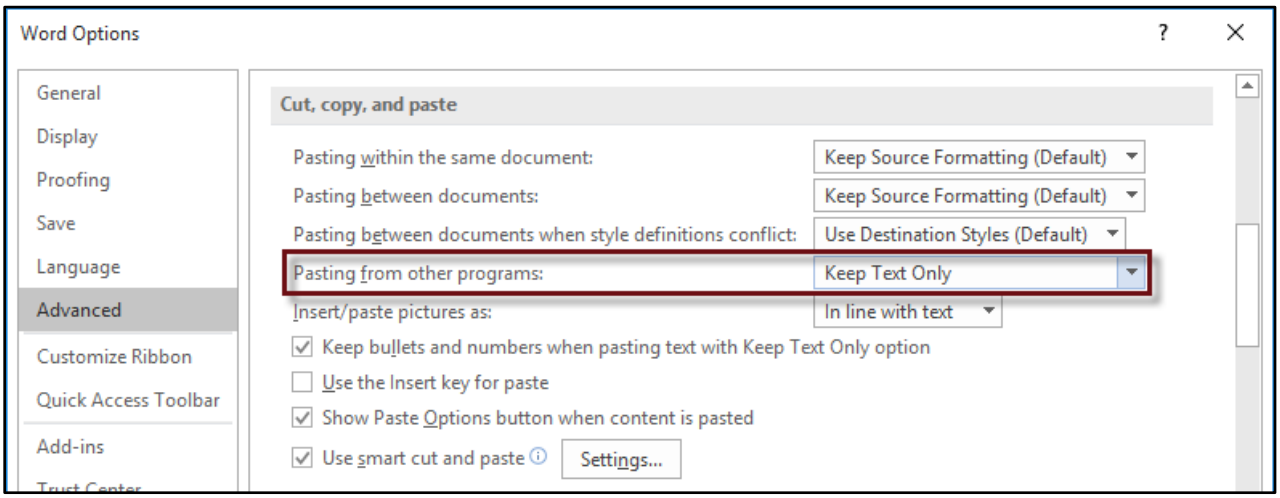
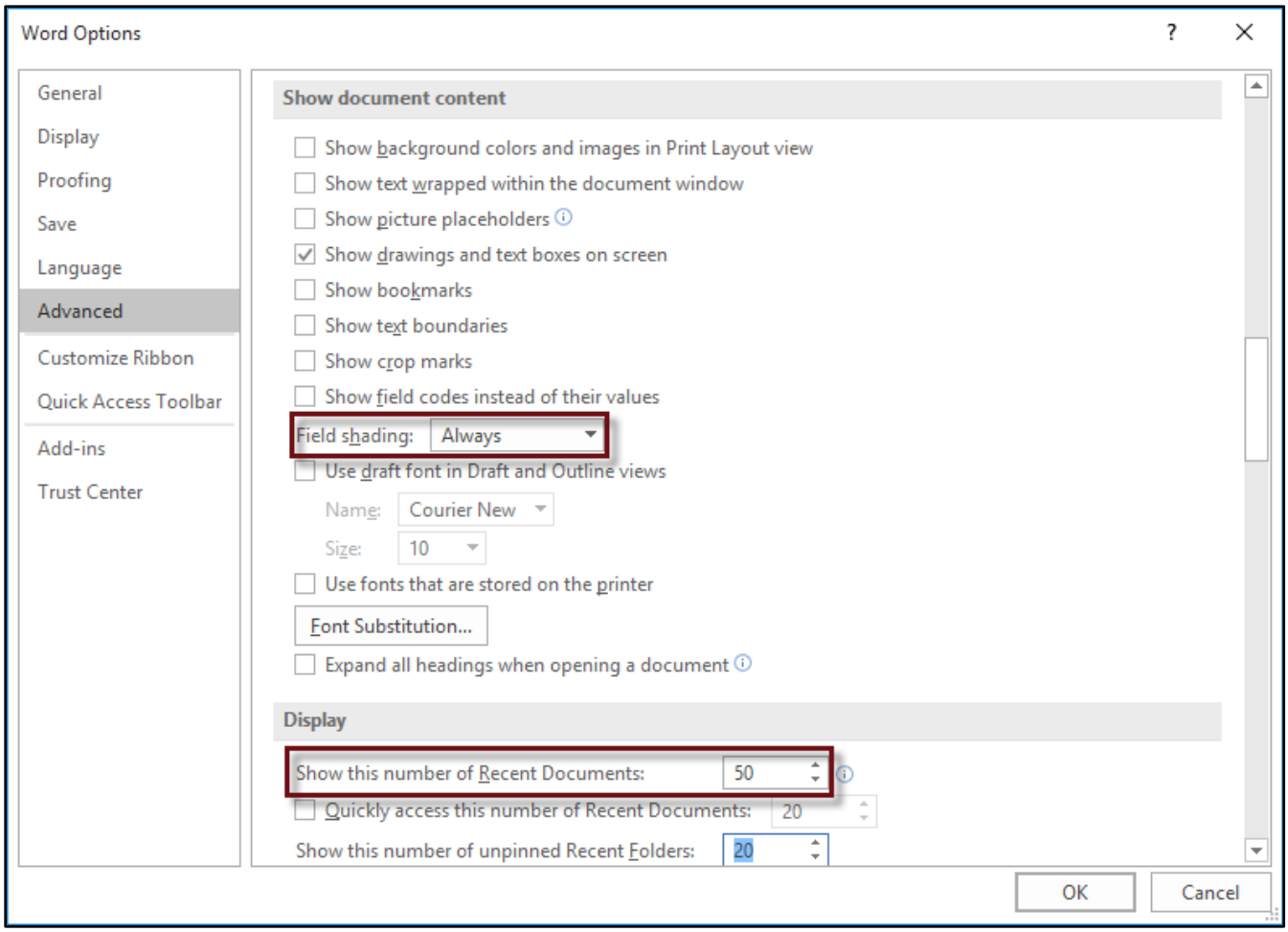


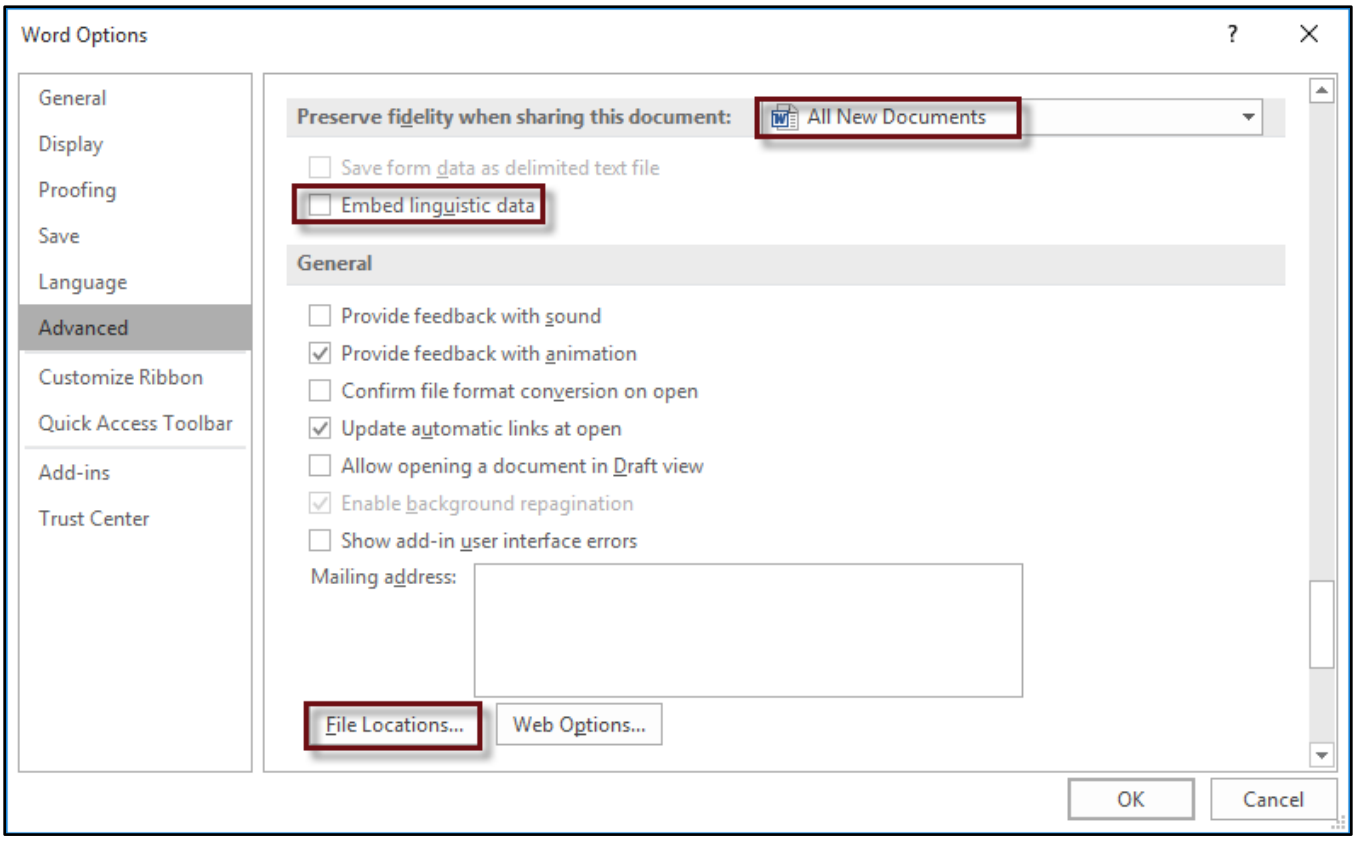
H. **Options ➔ Advanced ➔ Show Document Content**:



i. Change **Field shading** to **Always**.

ii. Change **Show this number of Recent Documents** to your preference.

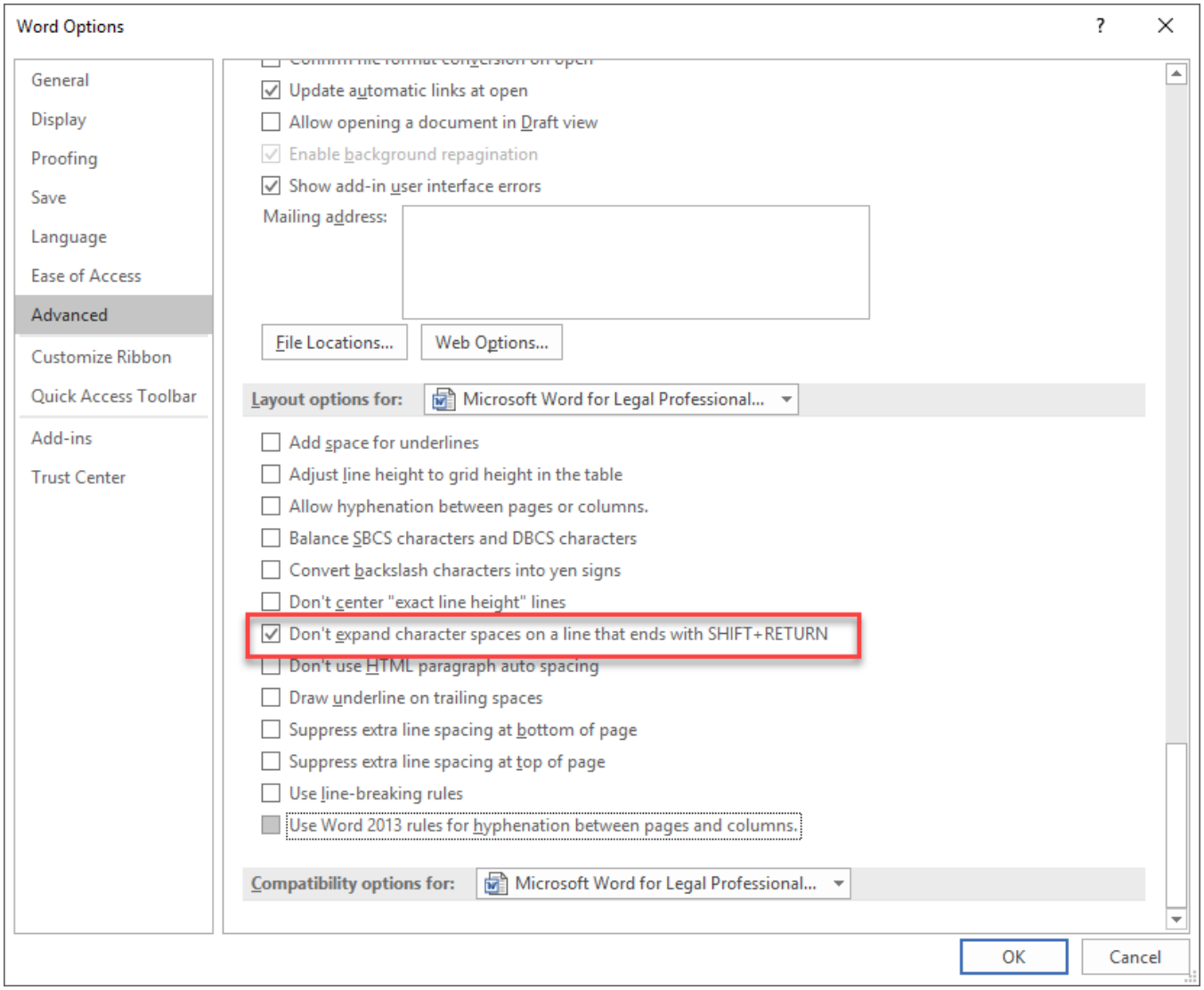
l. **Options ➔ Advanced ➔ Fidelity & General**:



i. Change the heading in **Preserve fidelity when sharing this document** to A**ll New Documents** (so the setting change applies to all future documents) and clear the **Embed linguistic data** box. "Linguistic data" refers to things like speech (from text-to-speech or speech-to-text applications or add-ins) and handwriting. You're probably not using either of those things so embedding them only makes the file-sizes bigger (unnecessarily).

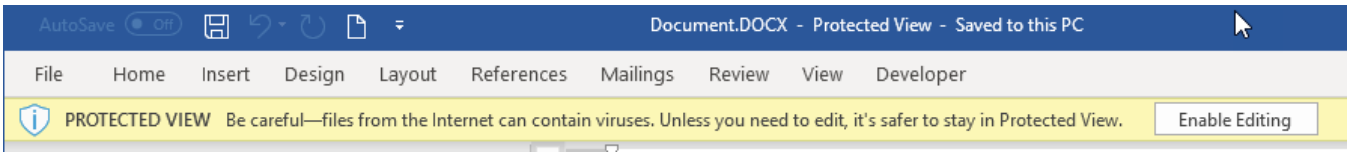
ii. Click **File Locations** and make sure that Word is defaulted to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.

J. **Options ➔ Advanced ➔ Layout Options**:



Check **Don't expand character spaces on a line that ends with SHIFT-RETURN** because this is the number one reason that a few words will be spread across the entire line with giant gaps between each word. For your information, Shift + Return = "soft return" which tricks Word into thinking that what appears to be two lines of text are actually one line of text.

K. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Protected View**: By default Protected View is enabled. When enabled, Word displays a warning if the Word document was created on a different system. While the warning is displayed, the file may only be viewed, not edited. To edit the document, you must click the **Enable Editing button**.



i. Protected View disables all of the active content in the document and reduces the risk of infection from a worm, virus, or other malware that could be embedded in an unknown document.

ii. If protected view bothers you, you may disable it. Yes, there is risk involved in disabling it. ***You should check with your system administrator prior to unchecking these boxes***. To change these settings, go to **Protected View** and uncheck one or all of the boxes. See **Error! Reference source not found.**.

iii. These boxes enable protected view, unchecking them disables the protection.

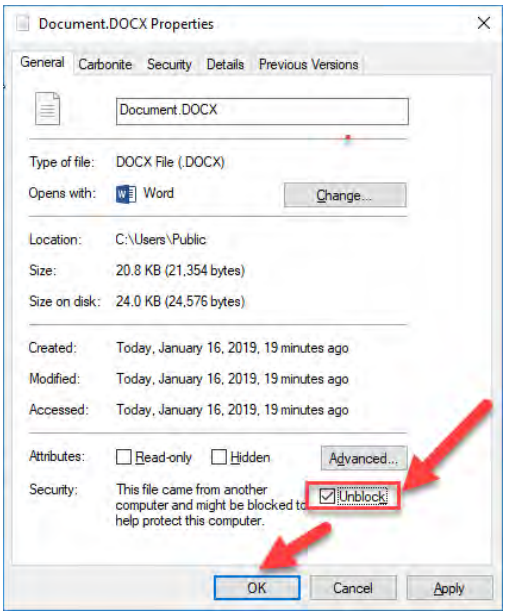
iv. **Enable Protected View for files originating from the Internet.** This should probably remain checked. If you download a Word document from a web page, or anywhere else from the internet, you will probably want the Protected View protection.

v. **Enable Protected View for files located in potentially unsafe locations.** This is the main cause of triggering Protected View when opening a file from a network folder. You may disable this, but you may want to make your network server a "Trusted Location" instead. (See Trusted Location, below.) Unchecking this box also disables Protected View from other locations, such as USB thumb drives.

vi. **Enable Protected View for Outlook attachments.** With this checked, you will receive a protected view warning for every Word document that you open as an attachment from Outlook. Unchecking this box turns off the protection.

vii. **NOTE:** In addition to these settings, Windows may "block" Outlook attachments that you save to your file system. To unblock them, you must right-click the file,

select **Properties**, check the **Unblock box** (on some systems this appears as a button instead of a checkbox), and click **OK**:

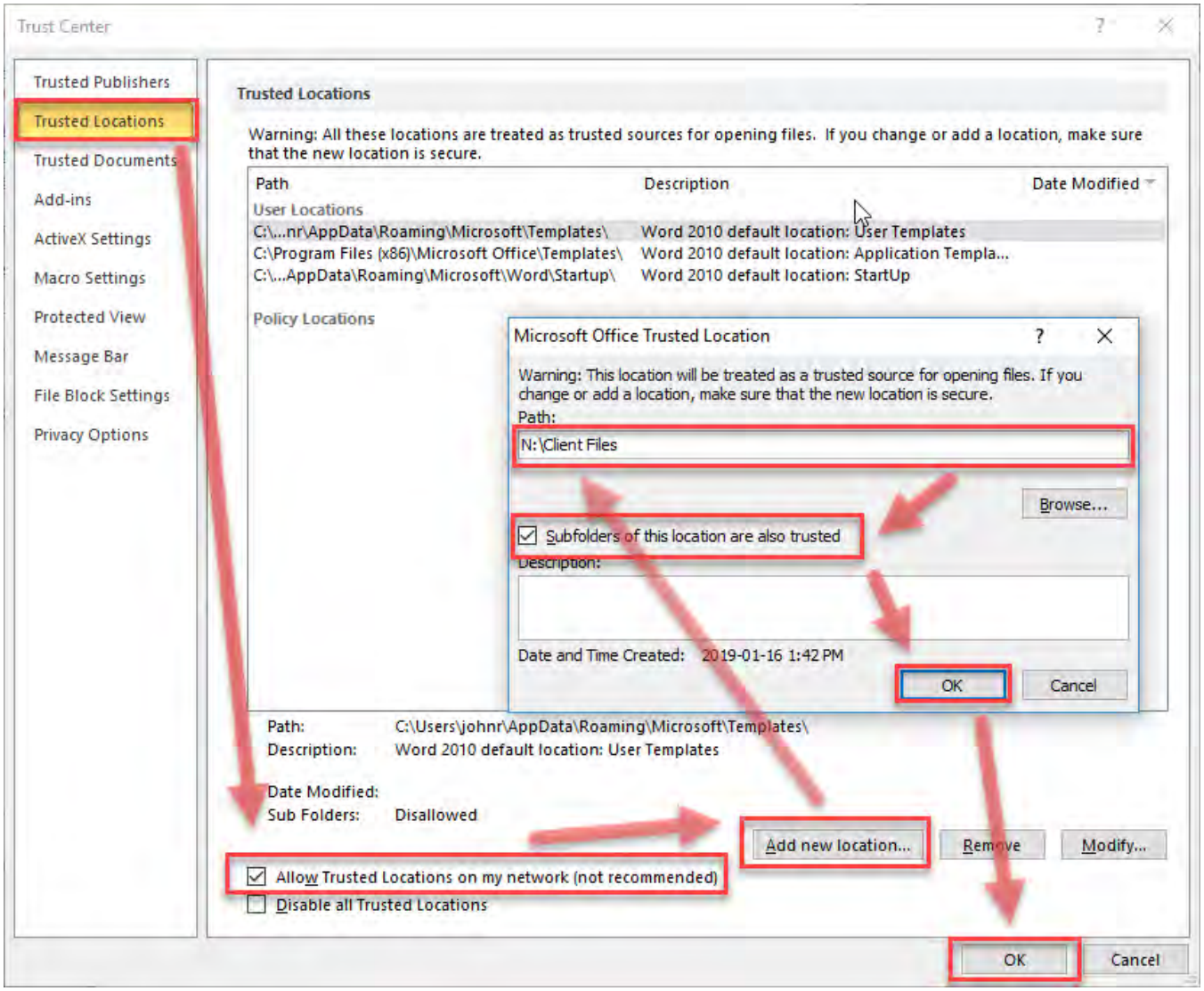


L. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Trusted Locations**: Trusted Locations are for folders on your system or on your network that you trust. Adding a folder or network share as a Trusted Location completely disables all of the Trust Center checks and protections for that location. To add a folder such as "N:\Client Files" as Trusted Location:

i. Go to File ➔ Options ➔ Trust Center ➔ Trust Center Settings ➔ Trusted Locations.

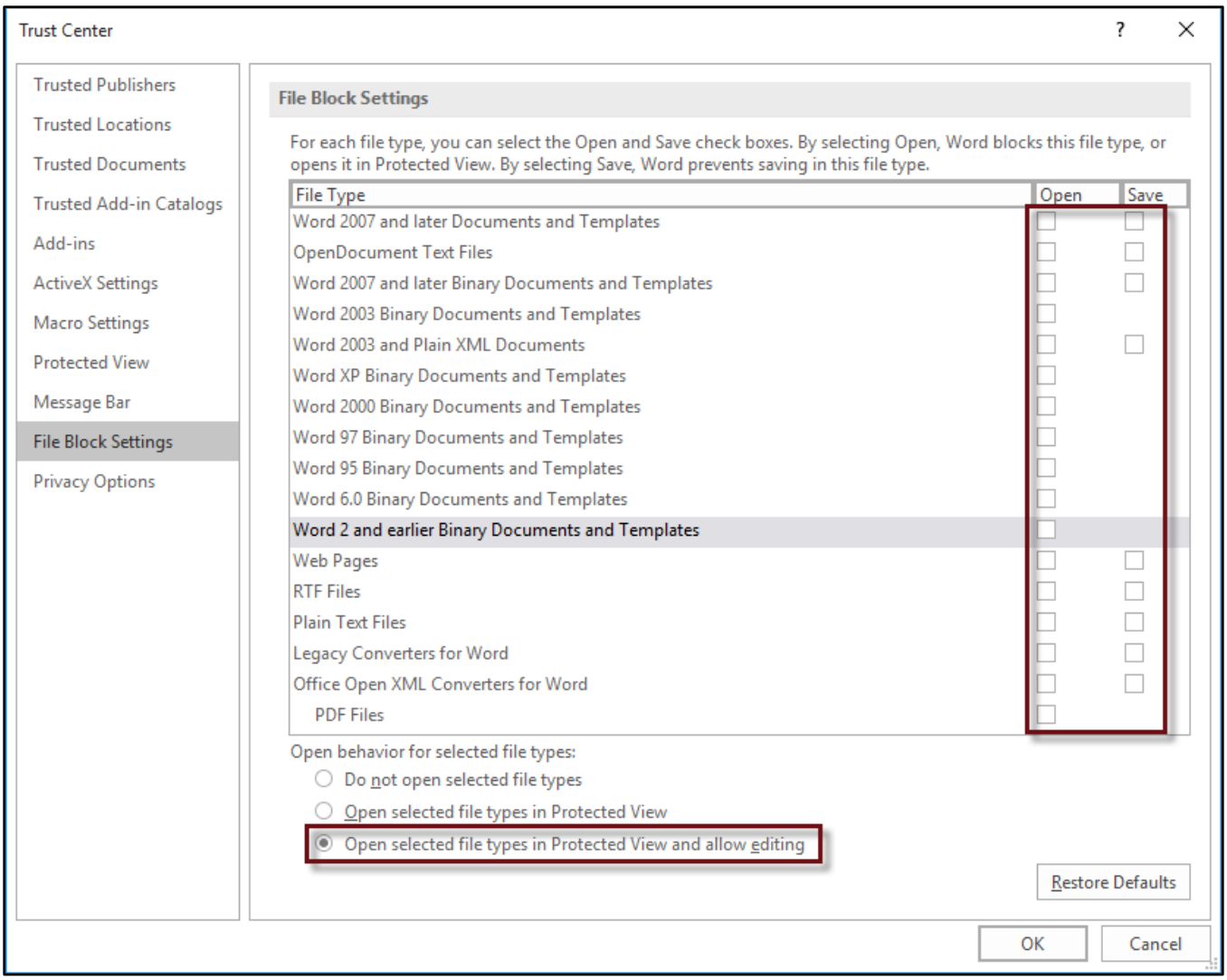
ii. Check the **Allow Trusted Locations on my network**. You will not be able to enter a network location without checking this box.

iii. Click **Add new location**, enter the path of the folder and check **Subfolders of this location are also trusted**. Then click **OK** and **OK**. All documents in that folder will now be trusted, and the Trust Center will no longer check them.

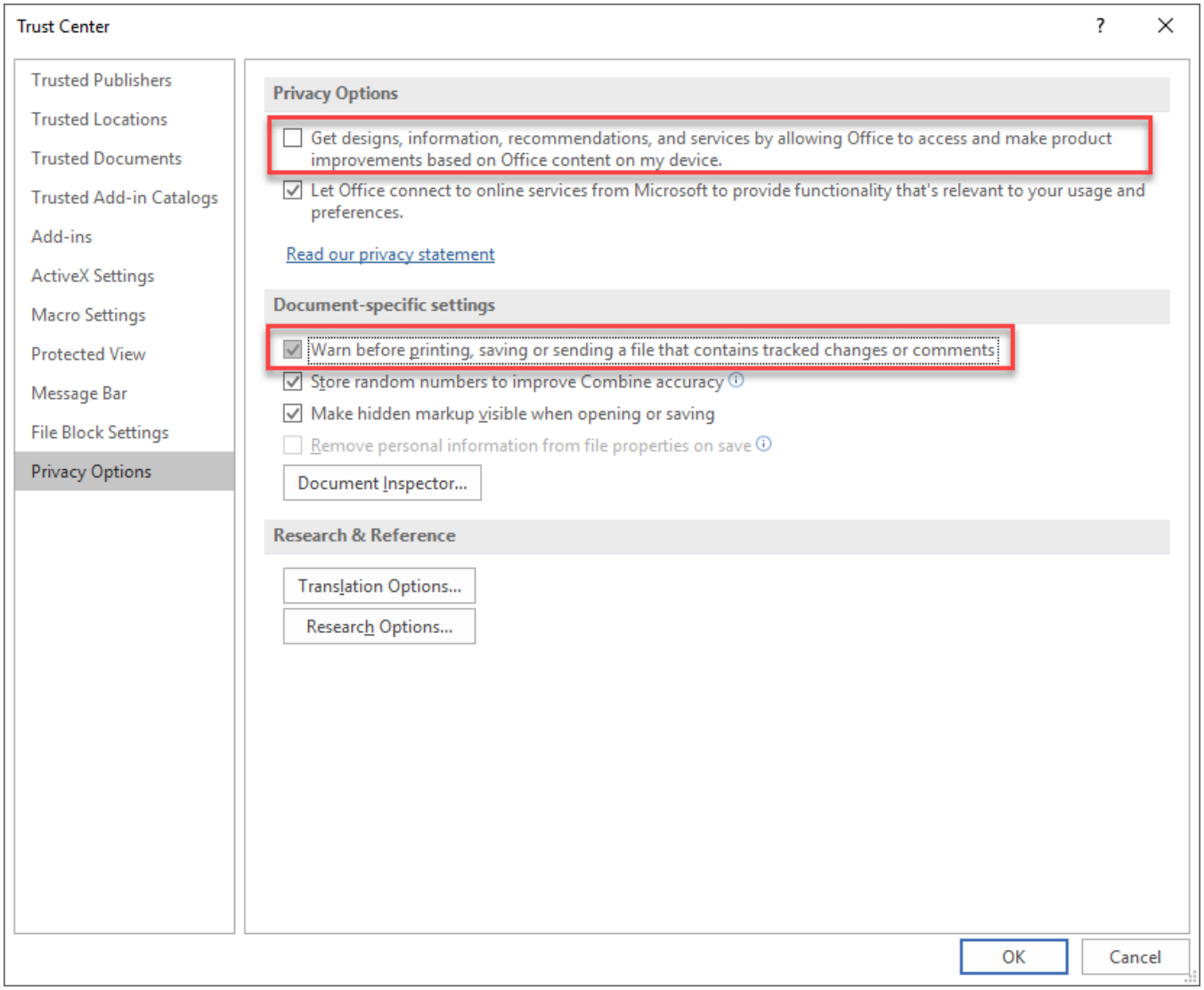


M. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ File Block Settings**: File Block Settings will trigger Protected View for all files of a particular type regardless of where they are located. Again, there is risk involved in disabling this feature. ***Check with your system administrator before unchecking these boxes***. In particular, there have been prior issues with RTF files.

To have all file types open and allow editing without a prompt, under the **File Block Settings**, uncheck all of the check boxes and under **Open behavior for selected filed types**, select **Open selected file types in Protected View and allow editing**. See **Error! R eference source not found.**.


Trust Center
Trusted Publishers
Trusted Locations
Trusted Documents
Trusted Add-in Catalogs
Add-ins
ActiveX Settings
Macro Settings
Protected View
Message Bar
File Block Settings
Privacy Options
File Block Settings
For each file type, you can select the Open and Save check boxes. By selecting Open, Word blocks this file type, or opens it in Protected View. By selecting Save, Word prevents saving in this file type.
File Type
Open
Save
Word 2007 and later Documents and Templates
OpenDocument Text Files
Word 2007 and later Binary Documents and Templates
Word 2003 Binary Documents and Templates
Word 2003 and Plain XML Documents
Word XP Binary Documents and Templates
Word 2000 Binary Documents and Templates
Word 97 Binary Documents and Templates
Word 95 Binary Documents and Templates
Word 6.0 Binary Documents and Templates
Word 2 and earlier Binary Documents and Templates
Web Pages
RTF Files
Plain Text Files
Legacy Converters for Word
Office Open XML Converters for Word
PDF Files
Open behavior for selected file types:
Do not open selected file types
Open selected file types in Protected View
Open selected file types in Protected View and allow editing
Restore Defaults
OK
Cancel

N. **Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Privacy Options**:

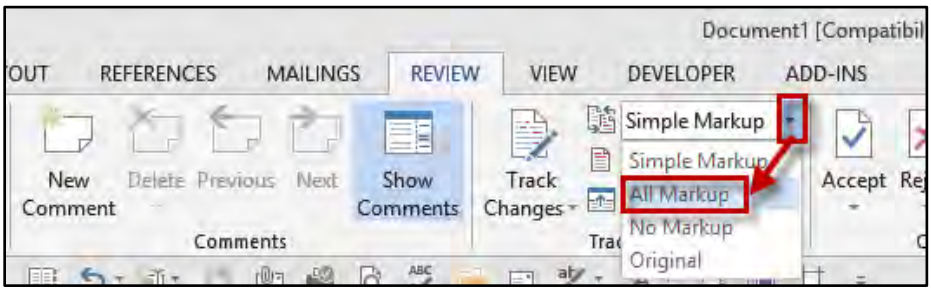


Go to the **Trust Center** and click the **Trust Center Settings button**. A new dialog will open. Click on **Privacy Options** and check **Warn before printing, saving or sending a file that contains tracked changes or comments**. Also clear the **Send personal information to Microsoft to make improvements to Office**.

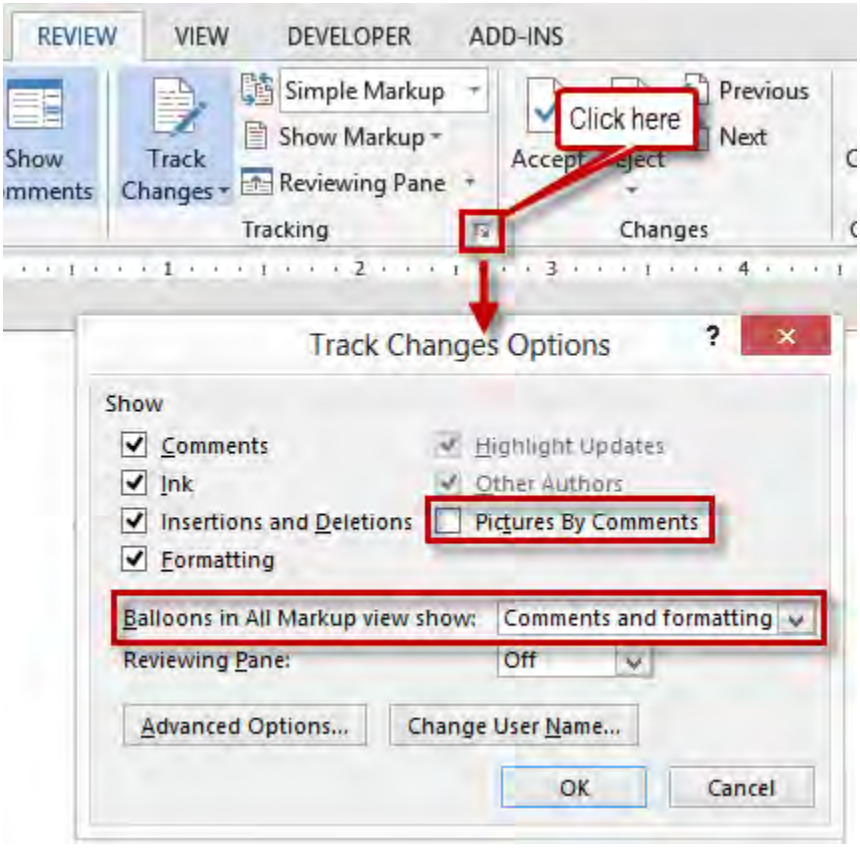
O. **Lock In Your Setting Changes**: Make sure that after you're doing with all of the foregoing changes that you click the **OK** button, **NOT Cancel** and **NOT** the **X button** in the top, right-hand corner of the dialog. That makes the changes stick. It's a good idea after you do this to exit Word, re-launch Word and spot check a couple of the settings to ensure that they're still modified. If the changes don't stick, there are a couple of reasons that could happen and I can help you figure out why. Just send me an email - info@affinityconsulting.com.

P. **Fix Track Changes Settings**: There are a few changes you'll want to make to the Track Changes defaults. All of these changes begin on the **Review ribbon** in Word 2016.

i. b: By default, Word shows you **Simple Markup** which means that if you delete text, it literally disappears and a little red, vertical line appears in the left margin adjacent to the line where something was deleted. Of course, I not only want to know that something was deleted, but *what* was deleted. Therefore, switch from **Simple Markup** to **All Markup** (see below).



ii. **Track Changes Options**: In order to get to this dialog, click **Review ribbon | Tracking launcher**.



iii. Clear **Pictures By Comments** (unnecessary and clutters up the comment screen).

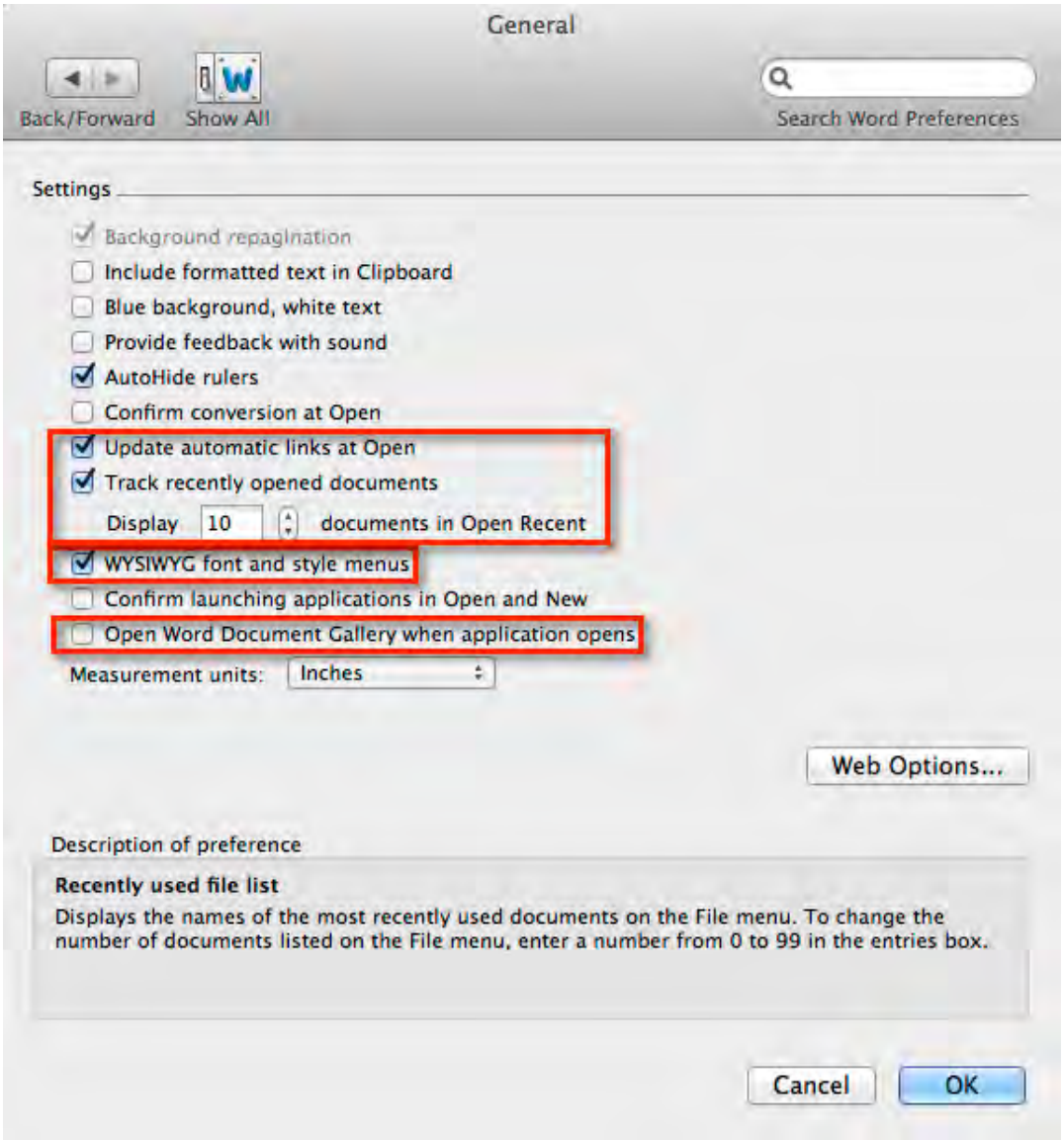
iv. **Balloons are best used for Comments and Formatting only**: not Revisions which is the default setting.

6. Default Setting Changes for Word 2011 for Mac:

A. **In General**: The default setting options for Word 2011 for Macintosh are not as elaborate as those for Word for Windows, but there are several enhancements you can make to improve your Word experience.

NOTE that you get to all of the following screens by clicking the Word Menu ➔ Preferences

B. **Preferences ➔ General**:



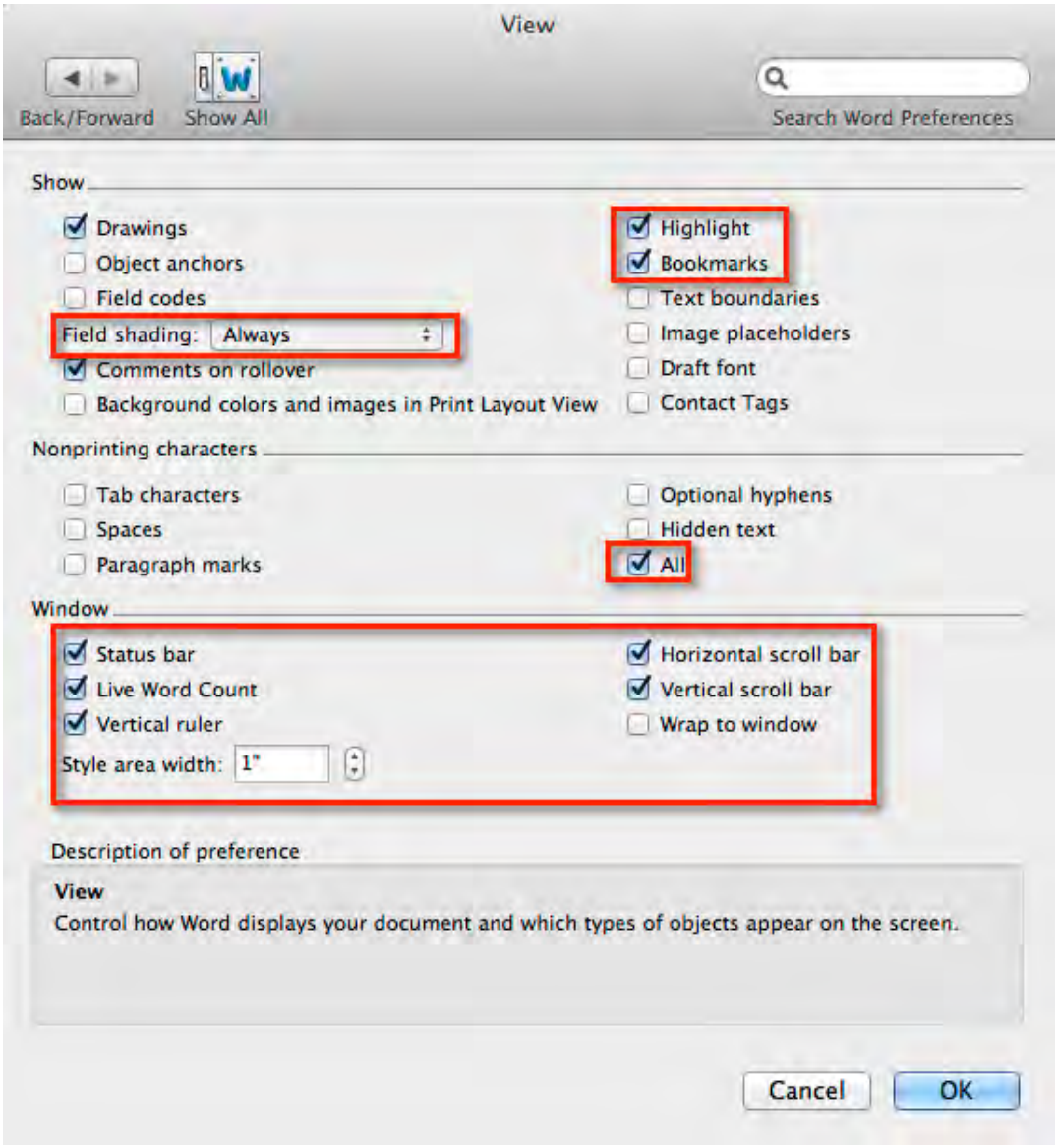
i. Check Update automatic links at Open. Checking this box ensure that anytime you edit a Word document with embedded images, Excel spreadsheets, etc., that Word checks to make sure you have the most current version of embedded file.

ii. Change Track recently opened documents to your preference.

iii. Check WYSIWYG font and style menu. Checking this box ensures that Word will display your fonts and styles in menu lists as they would actually appear on your document or in print. If you are having performance issues with Word, unchecking this box may help speed up the program.

iv. Uncheck Open Word Document Gallery when application opens. This is the giant template selection screen that opens whenever you open Word 2011. If you want Word 2011 to launch directly to a blank document when you run it, then you definitely want to clear this box.

C. **Preferences ➔ View**:



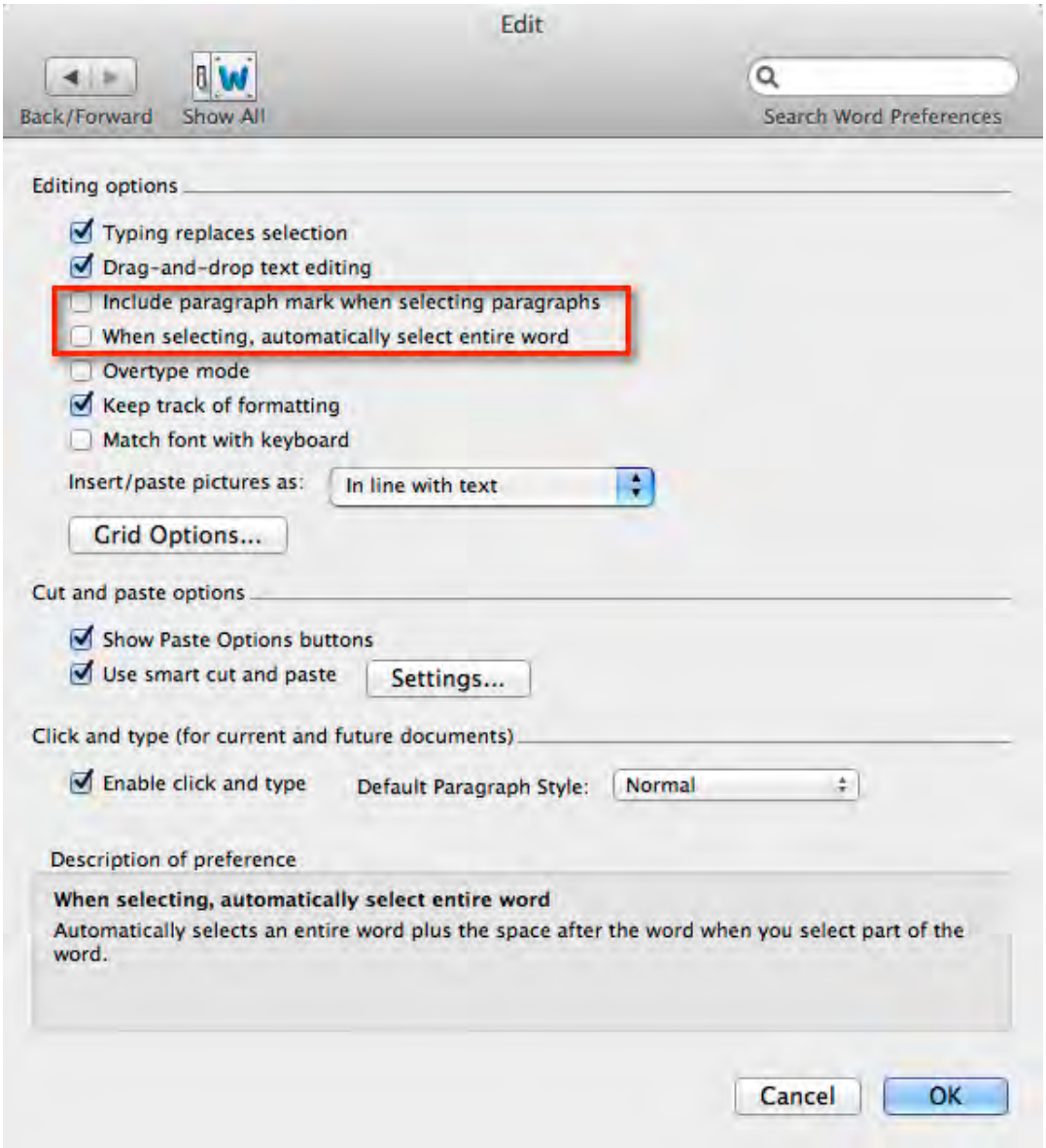
i. Check Highlighting and Bookmarks. Checking the highlighting box ensures that anything you color with the highlighting tool shows as highlighted in the document and when printed. Checking the "Bookmarks" tool tells Word to display a marker where you have inserted a bookmark in your document.

ii. Change the Field shading to Always. Field codes are special characters inserted into documents that automatically update as you work. This includes page numbers, paragraph numbering, and cross-references. Turning the shading to Always lets you know which numbering Word is handling for you.

iii. Under Nonprinting characters, check All. This setting is partly personal preference and partly formatting necessity. Checking this box makes it easier to see where you have extra carriage returns or two spaces between words.

iv. Under Window, check **everything except** Wrap to window and set the Style area width to 1". The status bar, at the bottom of the Word screen, is essential for seeing what page you're on, what section of the document you're in, and the document word count. The live word count is displayed in status bar. The vertical ruler is displayed along the left margin.

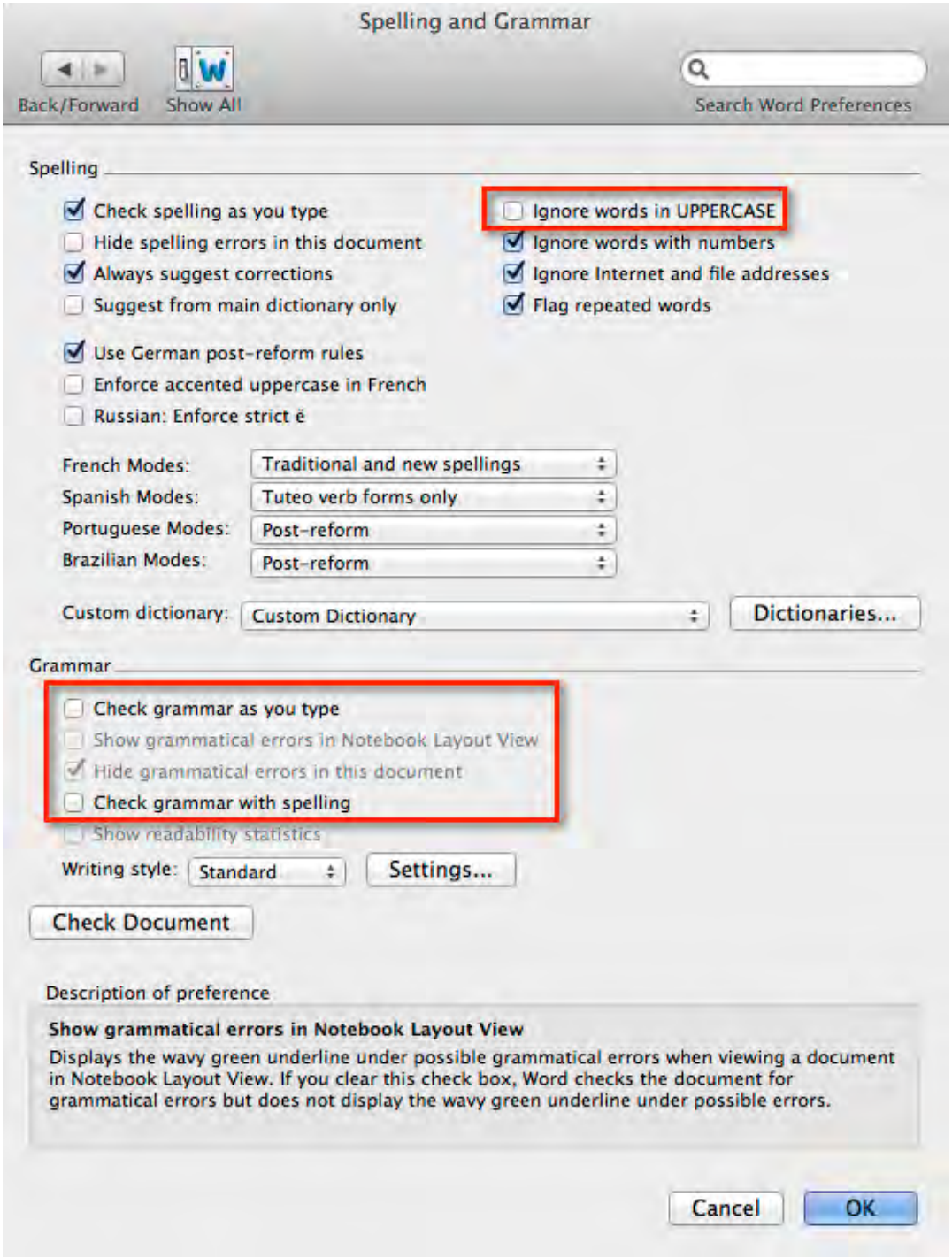
D. **Preferences ➔ Edit**:



i. Uncheck When selecting, automatically select entire word. Regain control over your mouse.

ii. Uncheck Include paragraph mark when selecting paragraphs.

E. **Preferences ➔ Spelling and Grammar**:

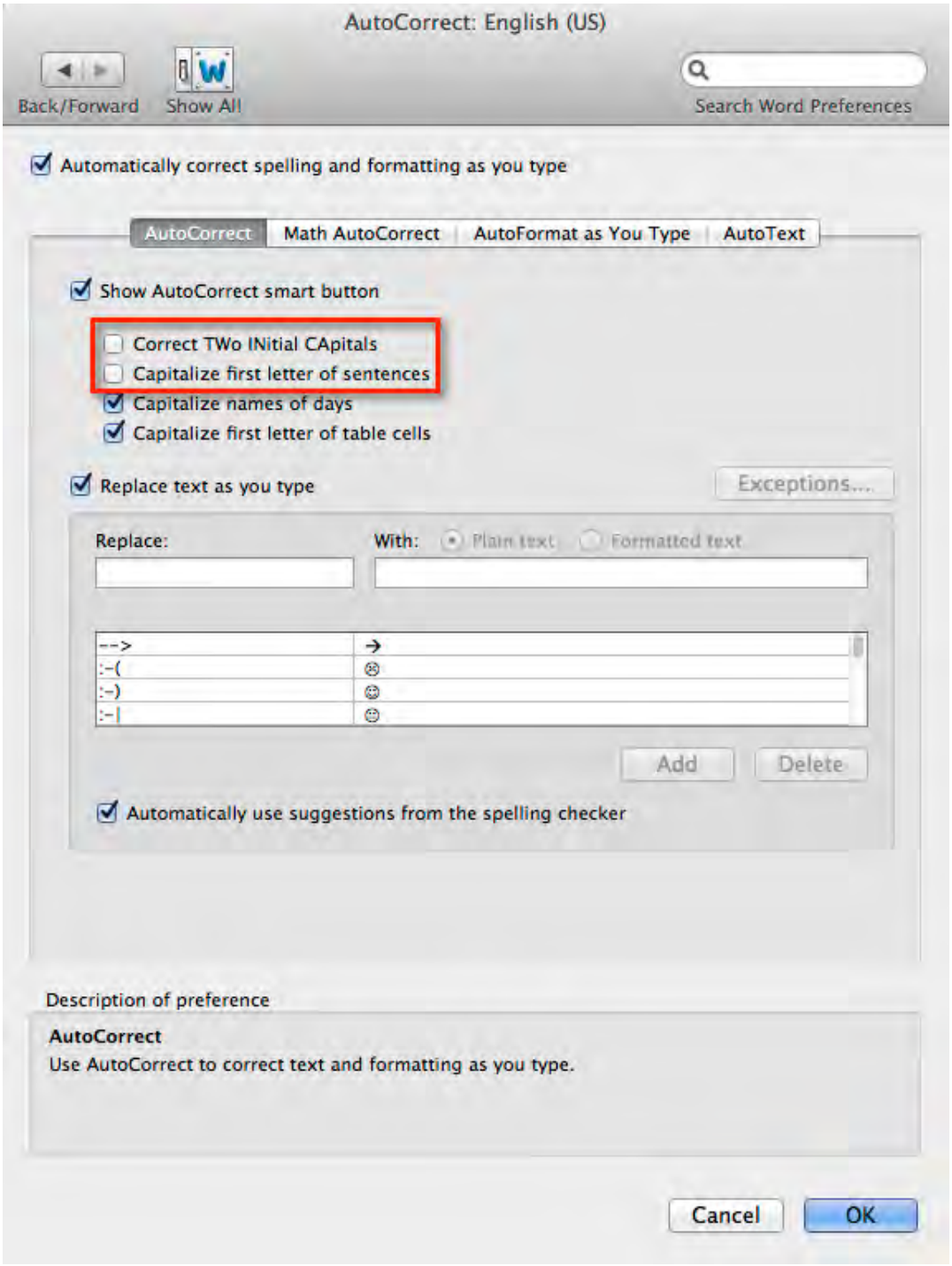


i. Uncheck Ignore words in UPPERCASE. Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.

ii. Uncheck Check grammar as you type. This will eliminate the green squiggly lines in the document.

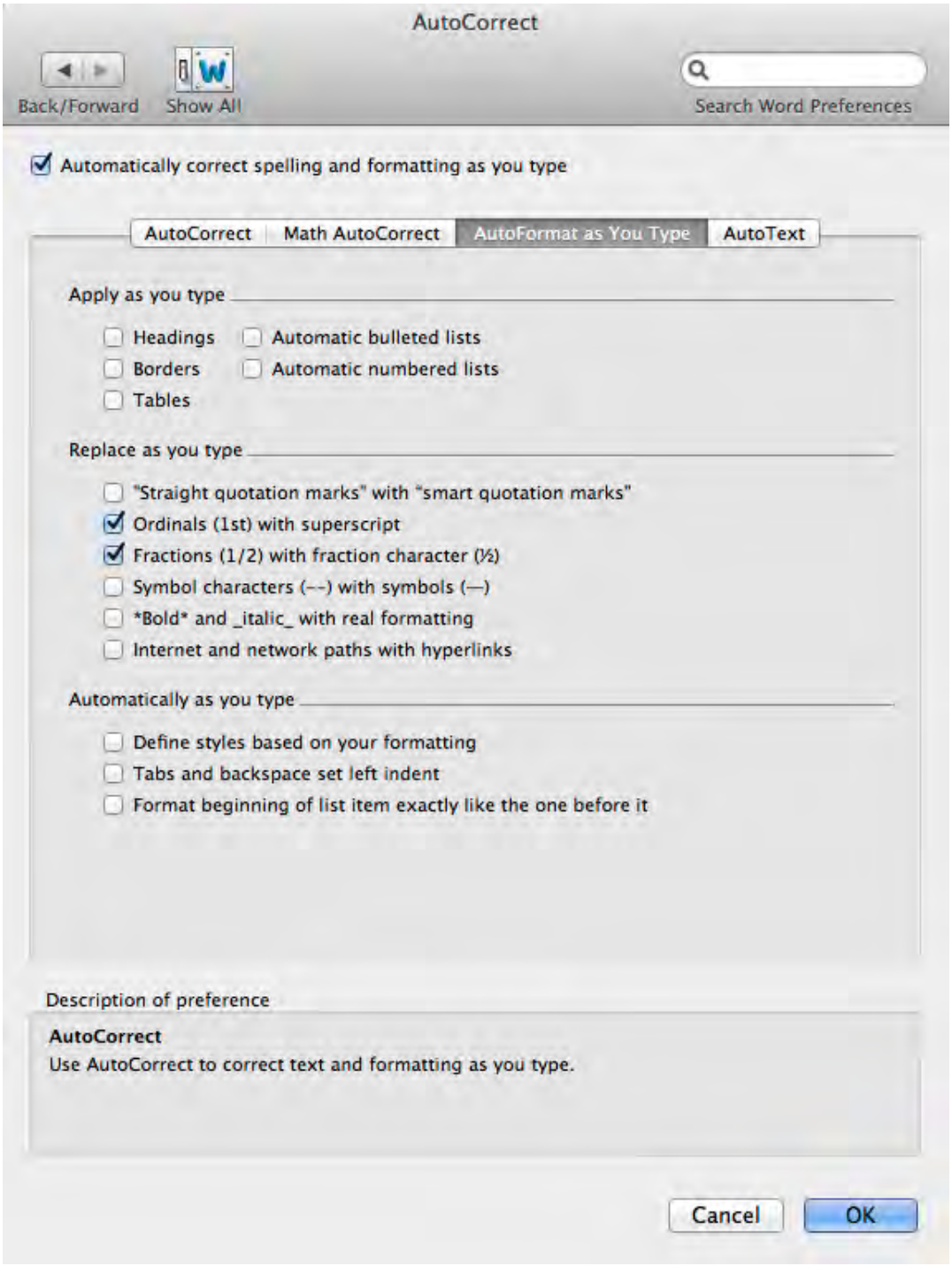
iii. Uncheck/Check Check grammar with spelling. Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

F. **Preferences ➔ AutoCorrect**:



Click on the AutoCorrect tab. Uncheck Correct TWo INitial CApitals and Capitalize first letter of sentences as most people find that annoying because they MEANT to do it (IDs or cc:).

Next click on the Autoformat As You Type tab.

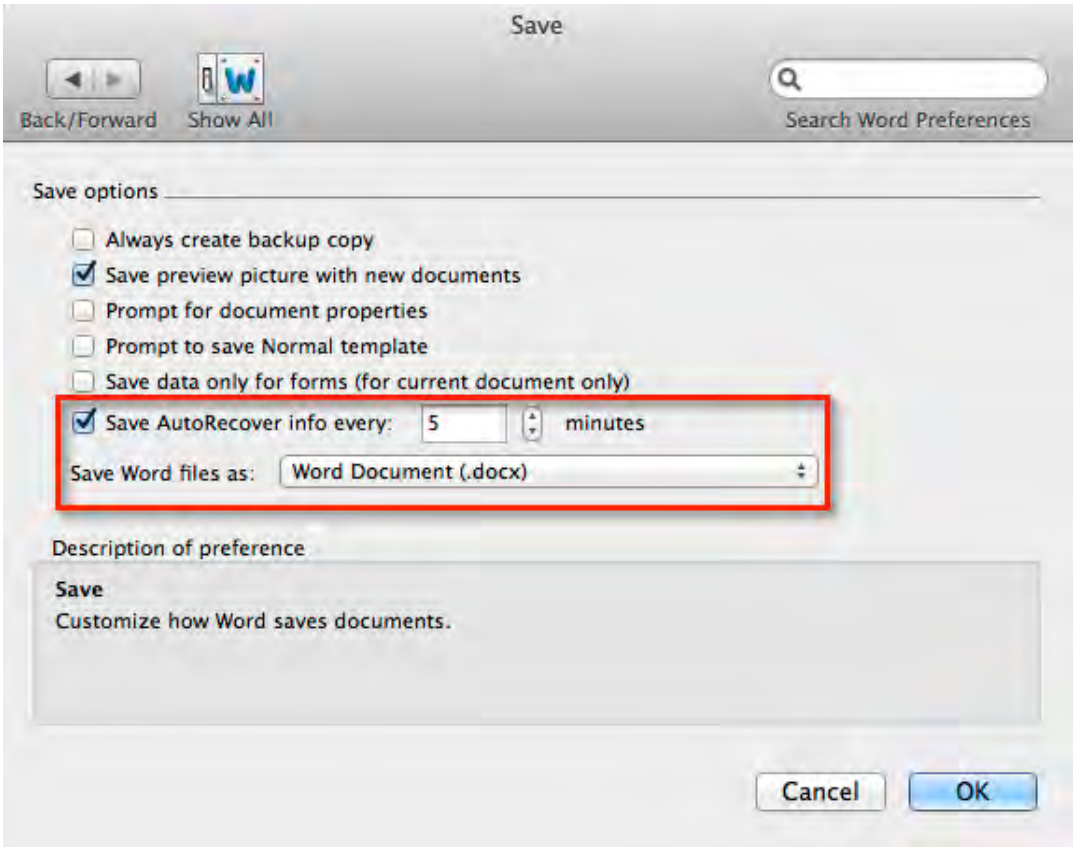


Uncheck **everything** except Ordinals and Fractions. Optional items include checking Internet and network paths with hyperlinks which will create clickable hyperlinks to internet addresses so that a person opening the document can click on the link and go to the web address right from the document. You might also check the Straight quotes with smart quotes but keep in mind that this may result in your quotation marks getting

converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

Be sure to uncheck everything else of this page!! The Apply as you type section causes Word to guess what is being typed and start inserting bulleted lists and tables on its own without any prompting to do so. Also be sure to uncheck Define styles based on your formatting. This option causes Word to create styles on its own.

G. **Preferences ➔ Save**:



i. Save AutoRecover info every…: Reduce this to 5 minutes rather than 10. More frequency is a good thing.

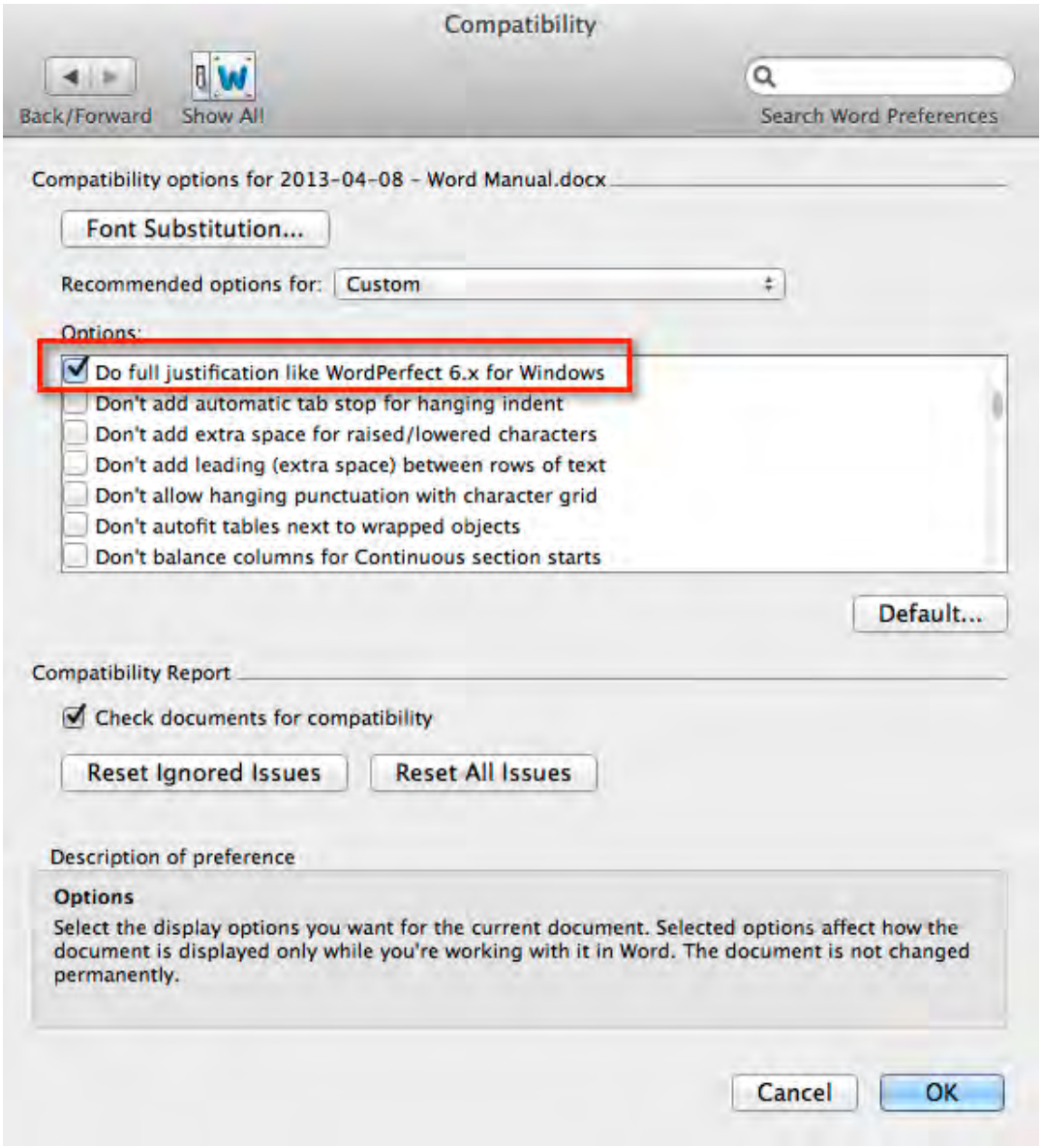
ii. Save Word files as: .docx is the standard Word file format for Word 2007 and 2010 for Windows and Word 2008 and 2011 for Macintosh. The only reason to change this default format is if you frequently exchange files with users of Word 2003 for Windows, Word 2004 for Macintosh, or earlier versions.

H. **Preferences ➔ Print**:

i. Check Update fields. Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.

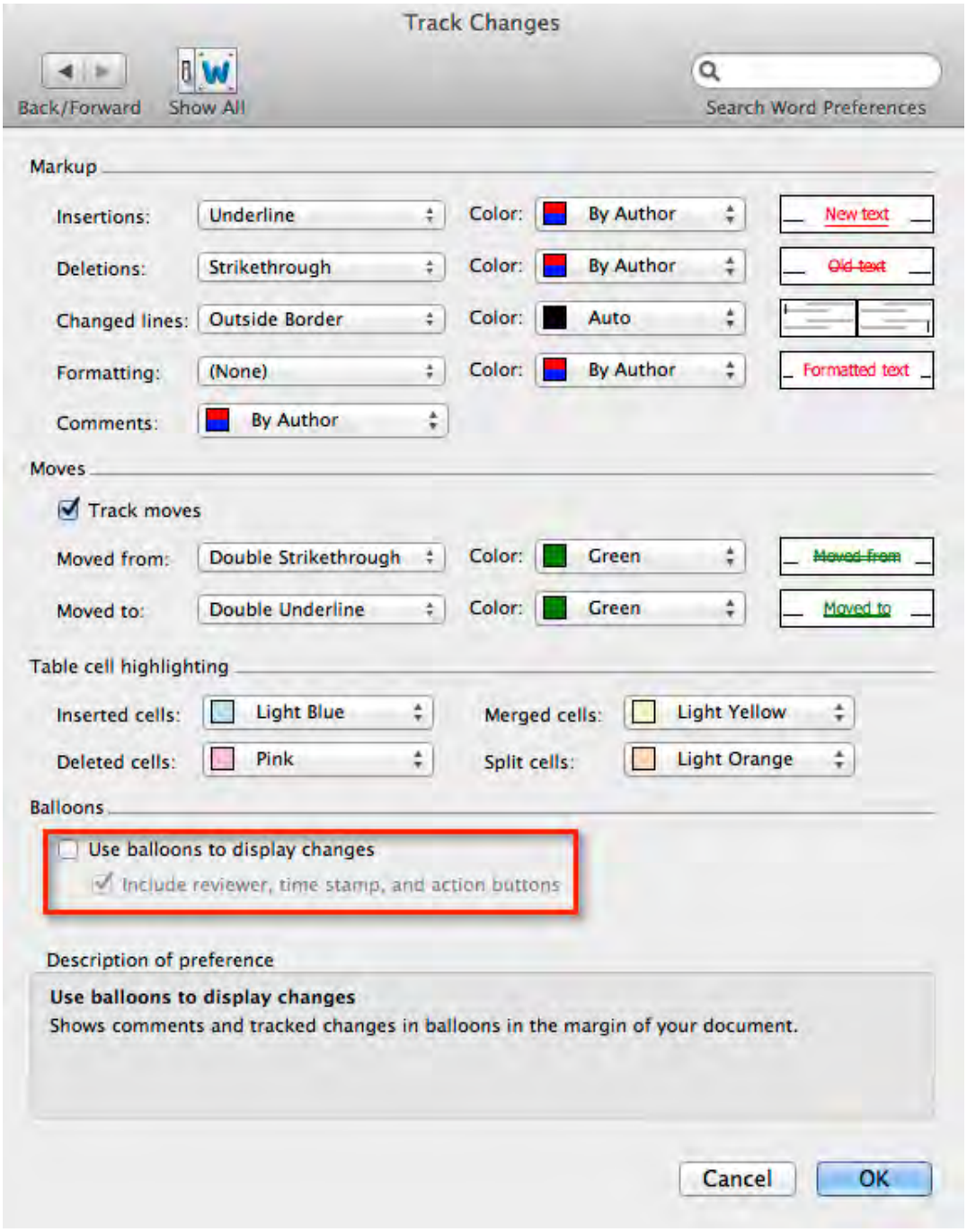
ii. Check Update links. This will make sure that all linked files are updated before printing.

I. **Preferences ➔ Compatibility**:



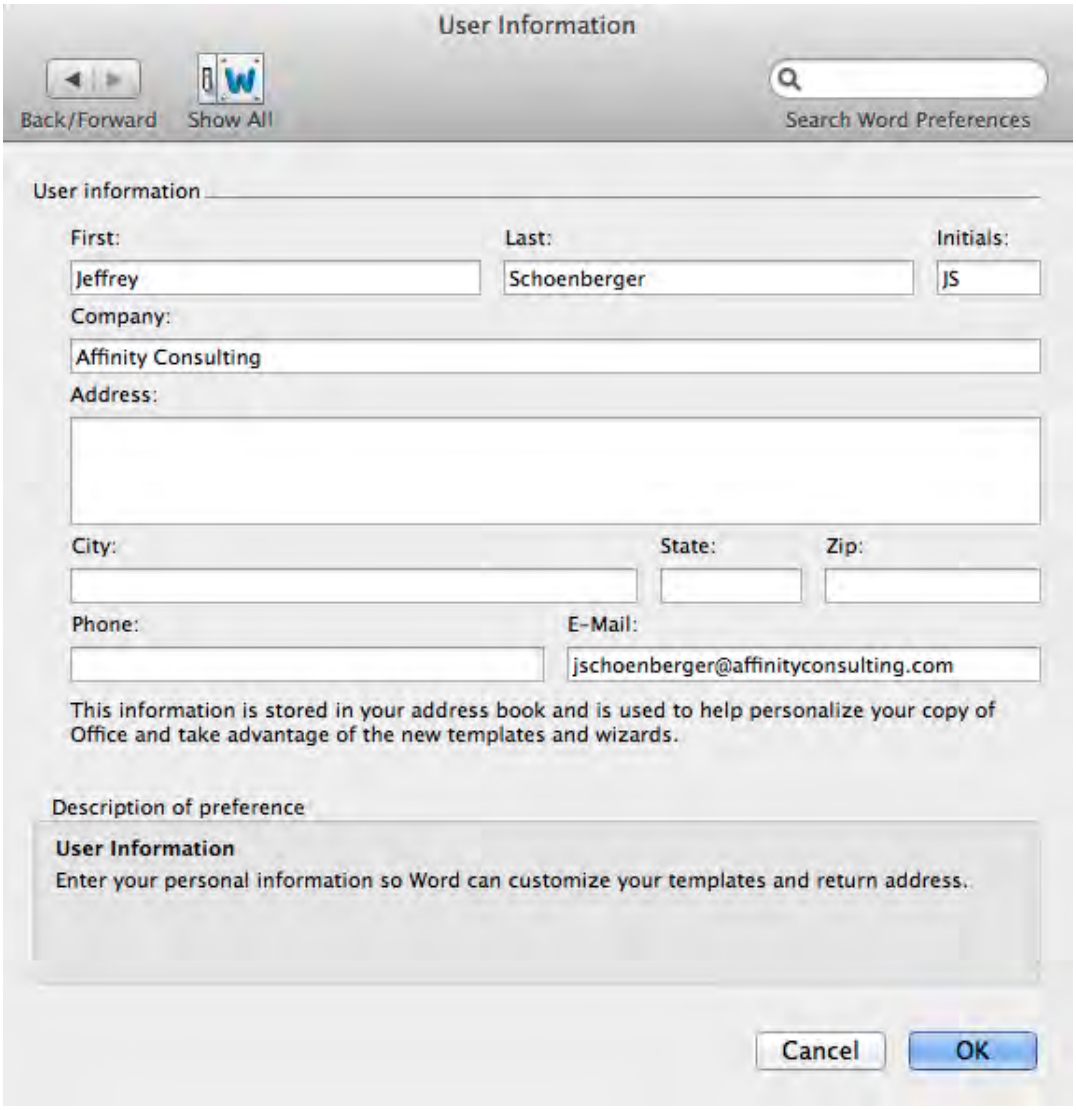
Do full justification like WordPerfect 6.x for Windows: If text using Word's full justification looks too spread out, try selecting Do full justification like Wordperfect 6.x for Windows.

J. **Preferences ➔ Track Changes**:



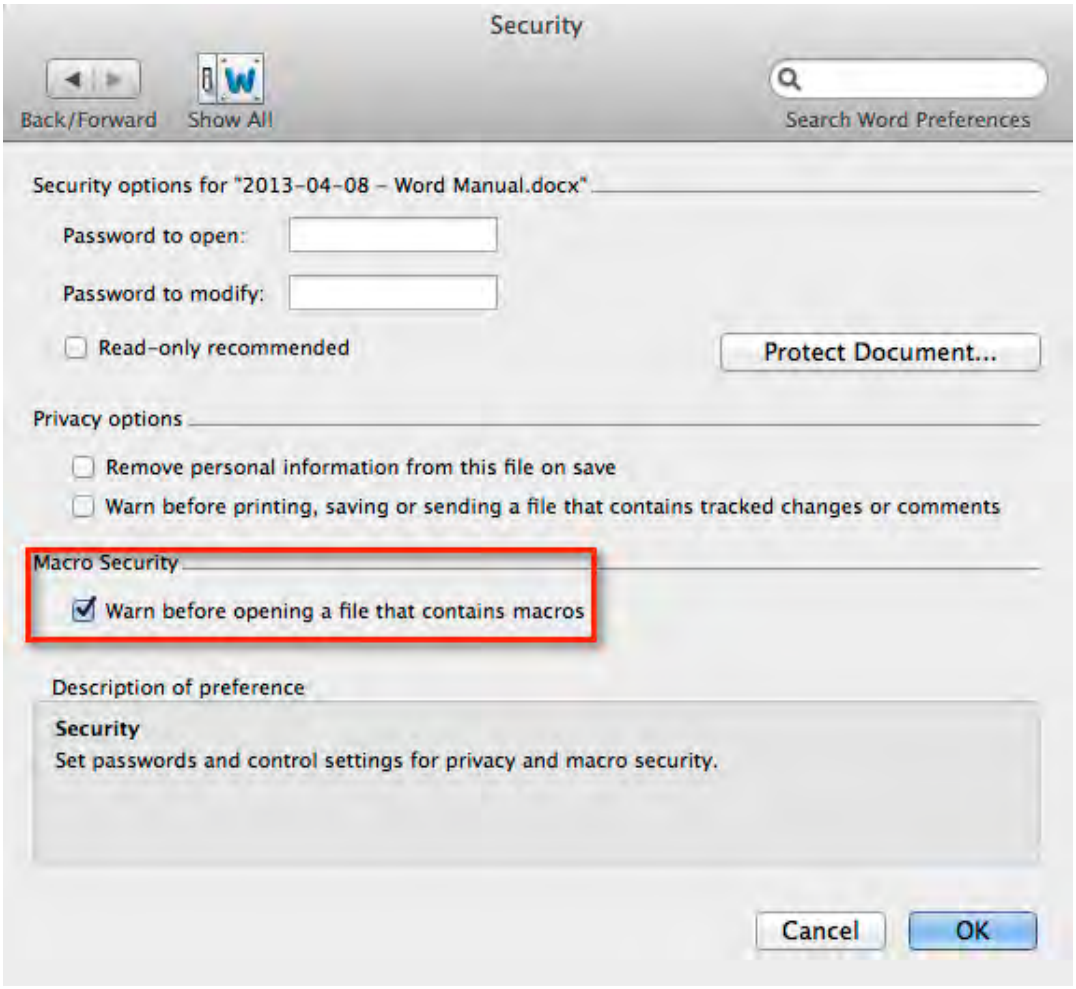
Balloons are best used for Comments and Formatting only.

K. **Preferences ➔ User Information**:



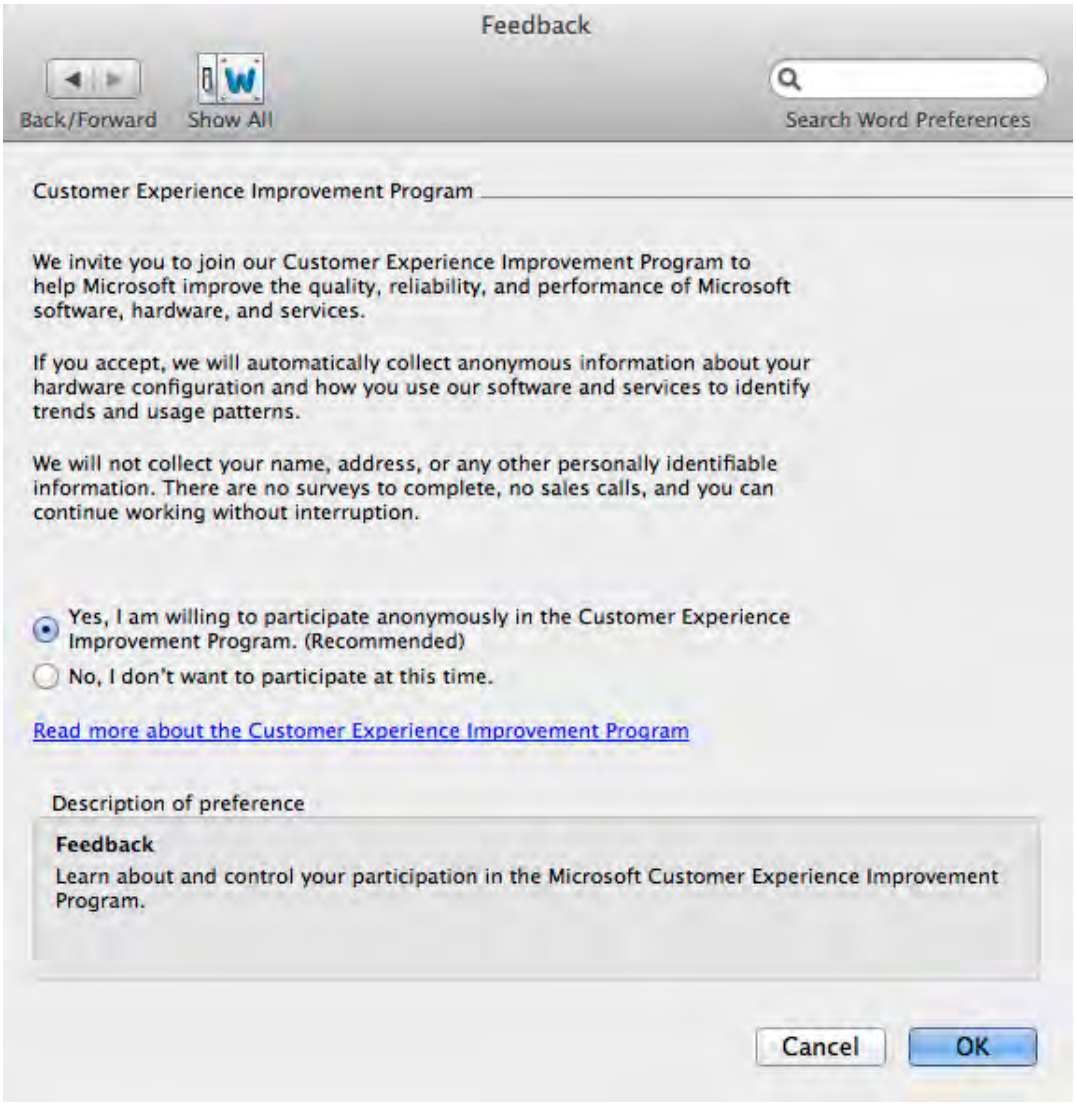
Personalization. Make sure your name and initials are in the appropriate boxes. Word uses that information for tracking changes and other document edits.

L. **Preferences ➔ Security**:



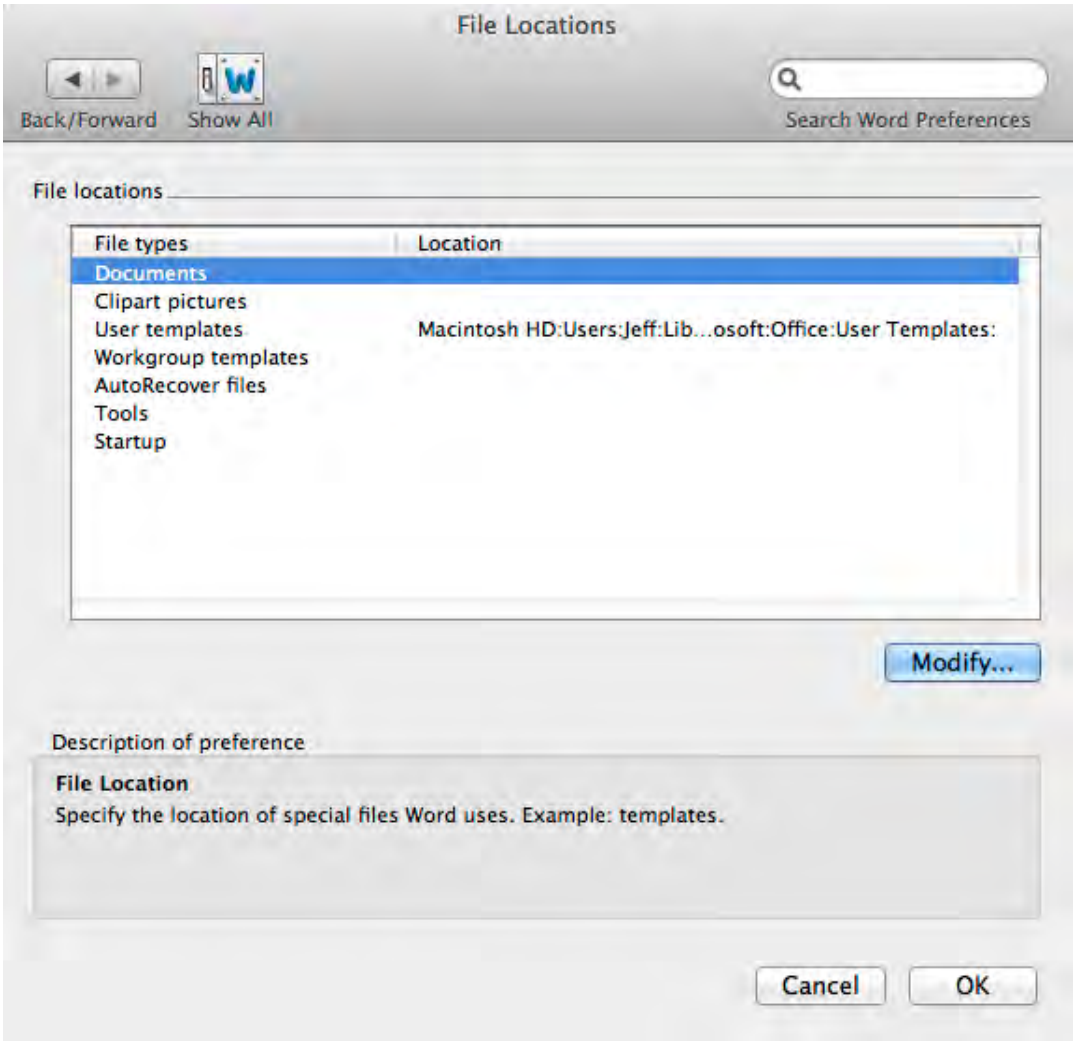
Macro Security. Macros are scripts or tiny programs that run within Word documents. If you want to be notified if the document you're opening contains a macro, check this box.

M. **Preferences ➔ Feedback**:



If you want Microsoft to collect anonymous data on how you use Word, select Yes on this screen.

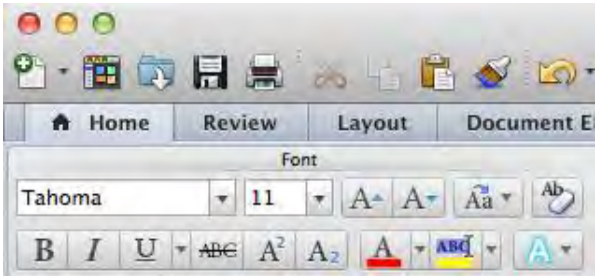
N. **Preferences ➔ File Locations**:



If you wish, you can change the default locations where Word looks for your documents, templates, etc. Make sure that Word defaults to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.

O. **Preferences ➔ Ribbon**: Word 2011 for Mac was the first version of Word for the Mac that accurately replicates the Ribbon experience Word for Windows users have had since

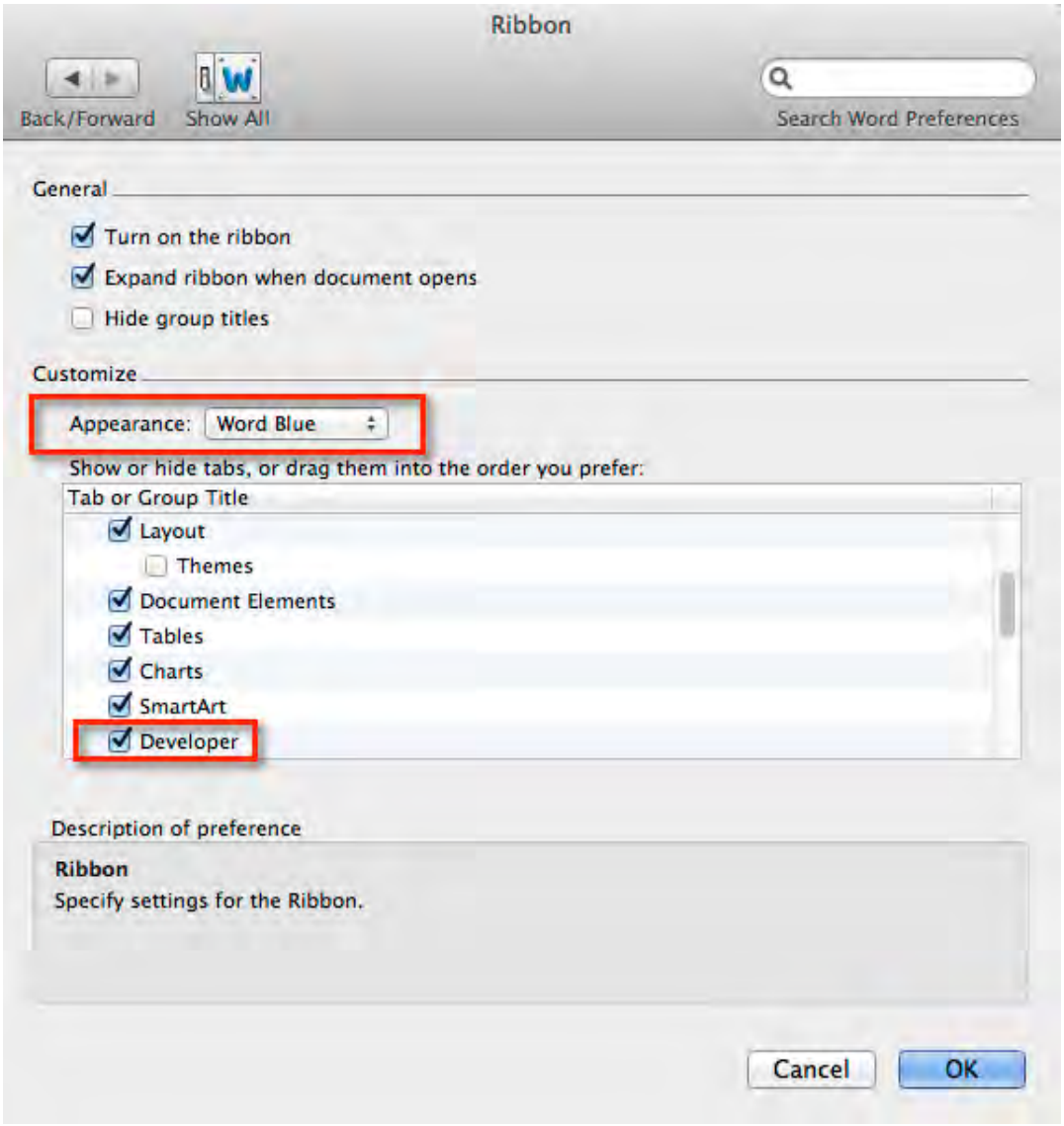
2007. This preference pane allows you choose whether to use the ribbon (the default behavior) or not. Compare the difference:



vs.

The ribbon interface exposes tremendously more functionality than previous Word versions. However, with some effort it is possible to recreate a Word 2004 for Mac look. If you would like to do so, contact me at jschoenberger@affinityconsulting.com, and I will walk you through the steps.

In addition to controlling whether the ribbon toolbar is displayed, the ribbon preference pane controls which tabs are displayed on the ribbon itself.



i. Appearance. Decide if you would prefer Word's interface elements to appear with a bluish or graphite appearance.

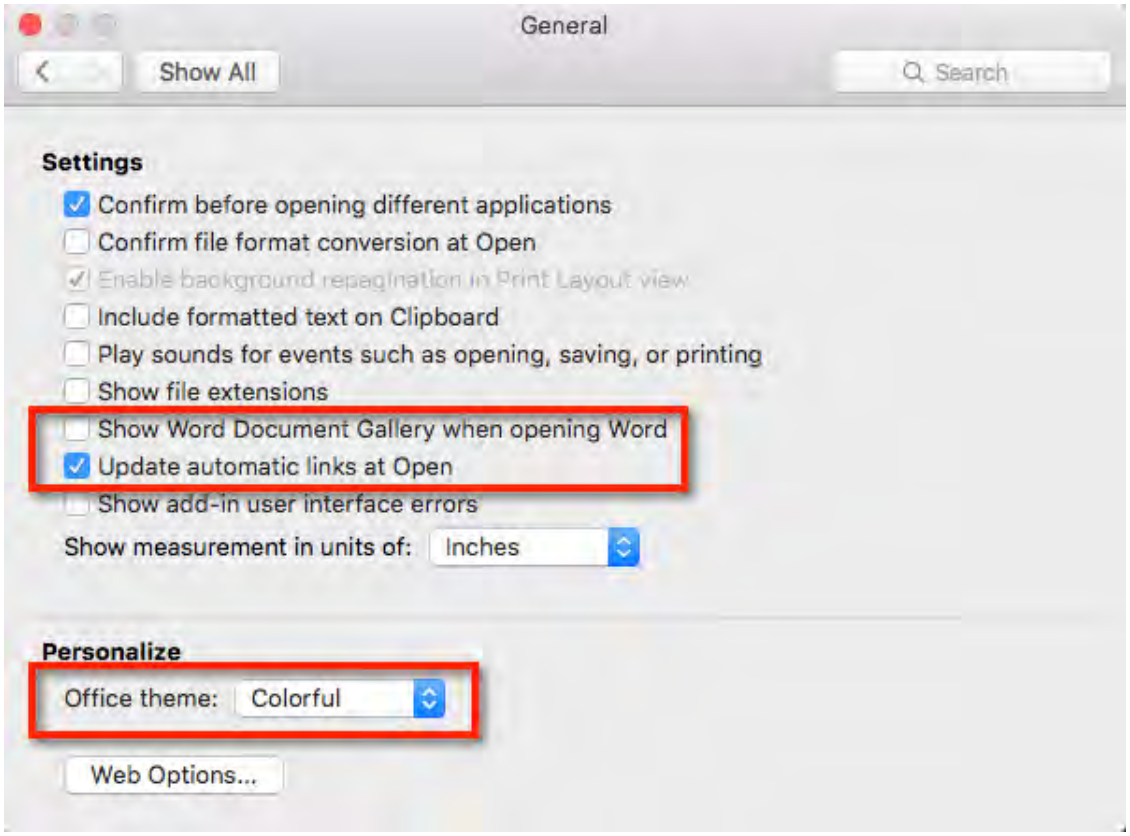
ii. Turn on the Developer tab. Checking this box will cause the developer tab to be displayed which includes form menus, templates and add ins, and additional macro controls.

7. Default Setting Changes for Word 2016 for Mac:

A. **In General**: The default setting options for Word 2016 for Macintosh are not as elaborate as those for Word for Windows, but there are several enhancements you can make to improve your Word experience.

NOTE that you get to all of the following screens by clicking the Word Menu → Preferences

B. **Preferences ➔ General**:

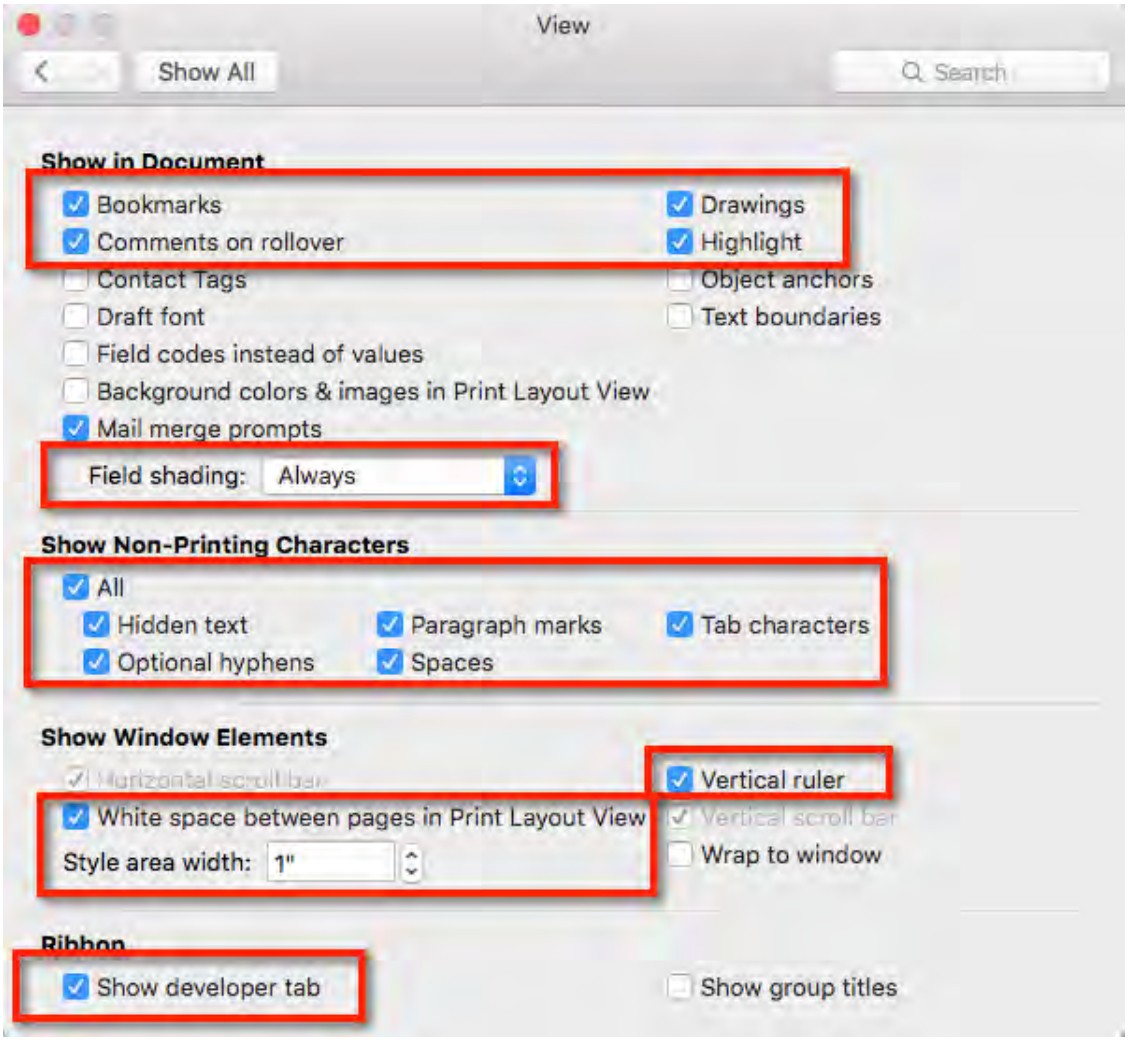


- **Uncheck "Open Word Document Gallery when application opens".** This is the giant template selection screen that opens whenever you open Word 2016. If you want Word 2016 to launch directly to a blank document when you run it, then you definitely want to clear this box.

- **Check "Update automatic links at Open".** Checking this box ensure that anytime you edit a Word document with embedded images, Excel spreadsheets, etc., that Word checks to make sure you have the most current version of embedded file.

- **Office Theme.** This selection lets you choose between having the window title bar appear in an app-specific color (blue for Word) versus a neutral gray color. This change if Office-wide, meaning it will also effect Excel, PowerPoint, etc.

C. **Preferences ➔ View**:



- **Check "Highlight", "Bookmarks", "Comments on rollover", and "Drawings".** Checking the highlighting box ensures that anything you color with the highlighting tool shows as highlighted in the document and when printed. Checking the "Bookmarks" tool tells Word to display a marker where you have inserted a bookmark in your document. Checking "Comments on rollover" displays document comments when you hover your mouse over a commented passage. Checking "Drawings" makes sure any freeform drawings appear in your document (unlikely for legal writing, but on by default).

- **Change the "Field shading" setting to "Always".** Field codes are special characters inserted into documents that automatically update as you work. This includes page numbers, paragraph numbering, and cross-references. Turning the shading to "Always" lets you know which numbering Word is handling for you.

- **Under Nonprinting characters, check “All”.** This setting is partly personal preference and partly formatting necessity. Checking this box makes it easier to see where you have extra carriage returns or two spaces between words.

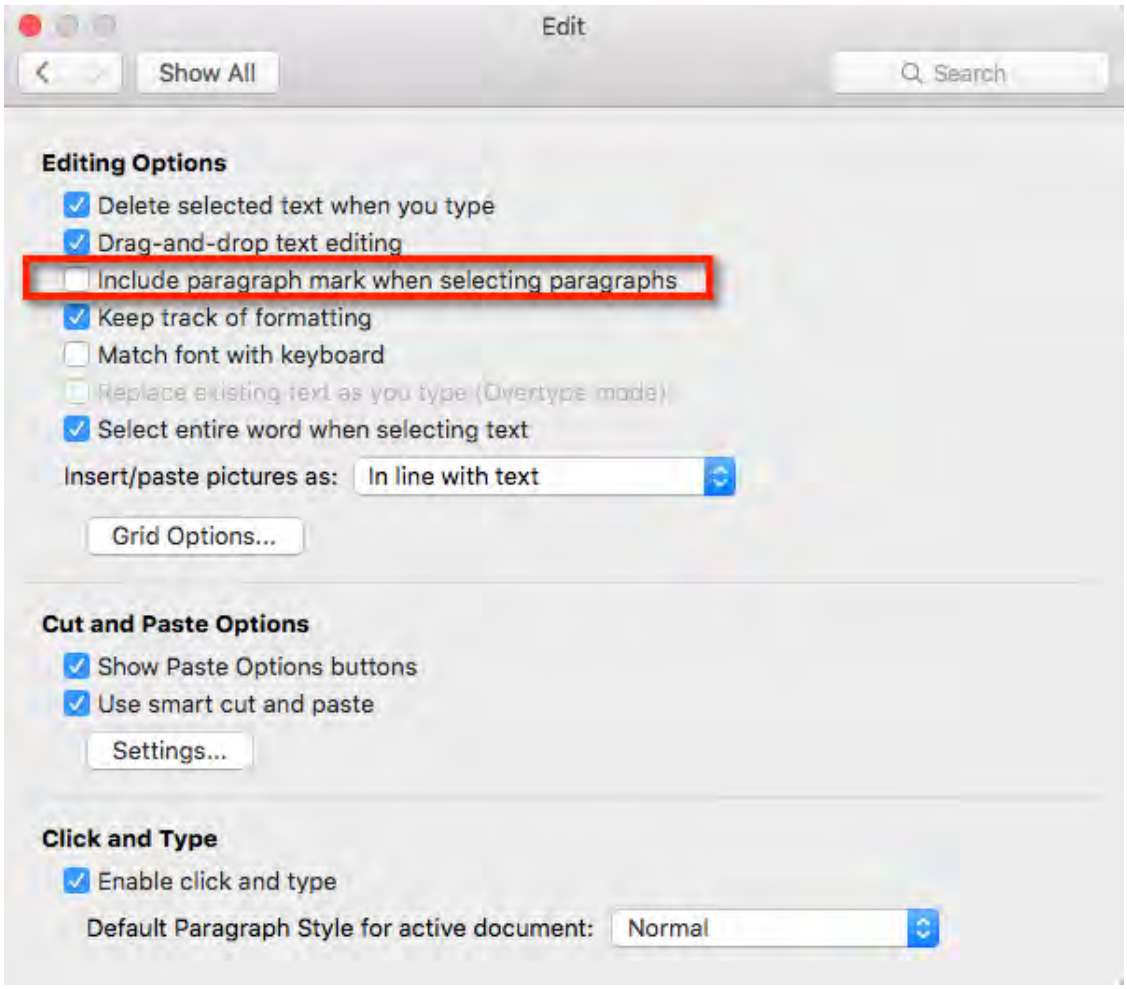
- **Set the Style area width to 1”.** If you use the “Draft” view mode, you might want to see whaty styles are attached to various paragraphs. Setting this display preference to 1” allows this.

- **Vertical Ruler.** The vertical ruler is displayed along the left margin.

- **White Space Between Pages.** If you like to see a bit of space between each page of text in “Print Layout” view, check this box.

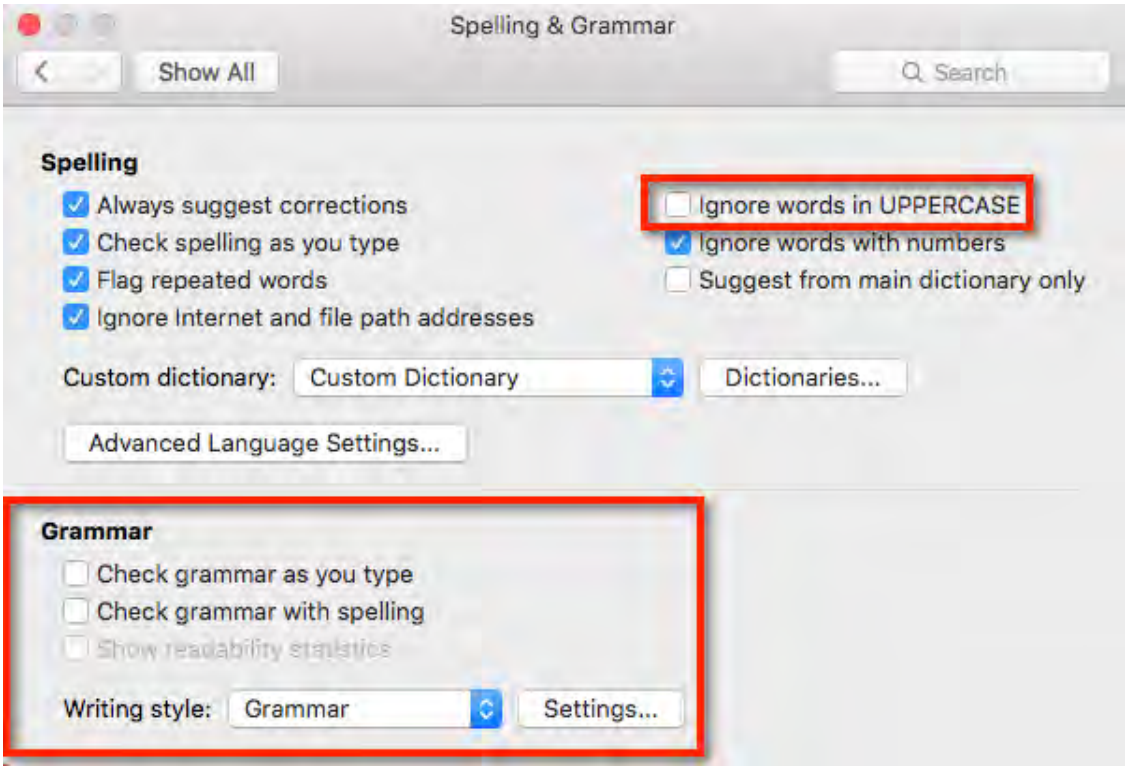
- **Turn on the "Developer" tab.** Checking this box will cause the developer tab to be displayed which includes form menus, templates and add ins, and additional macro controls.

D. **Preferences ➔ Edit**:



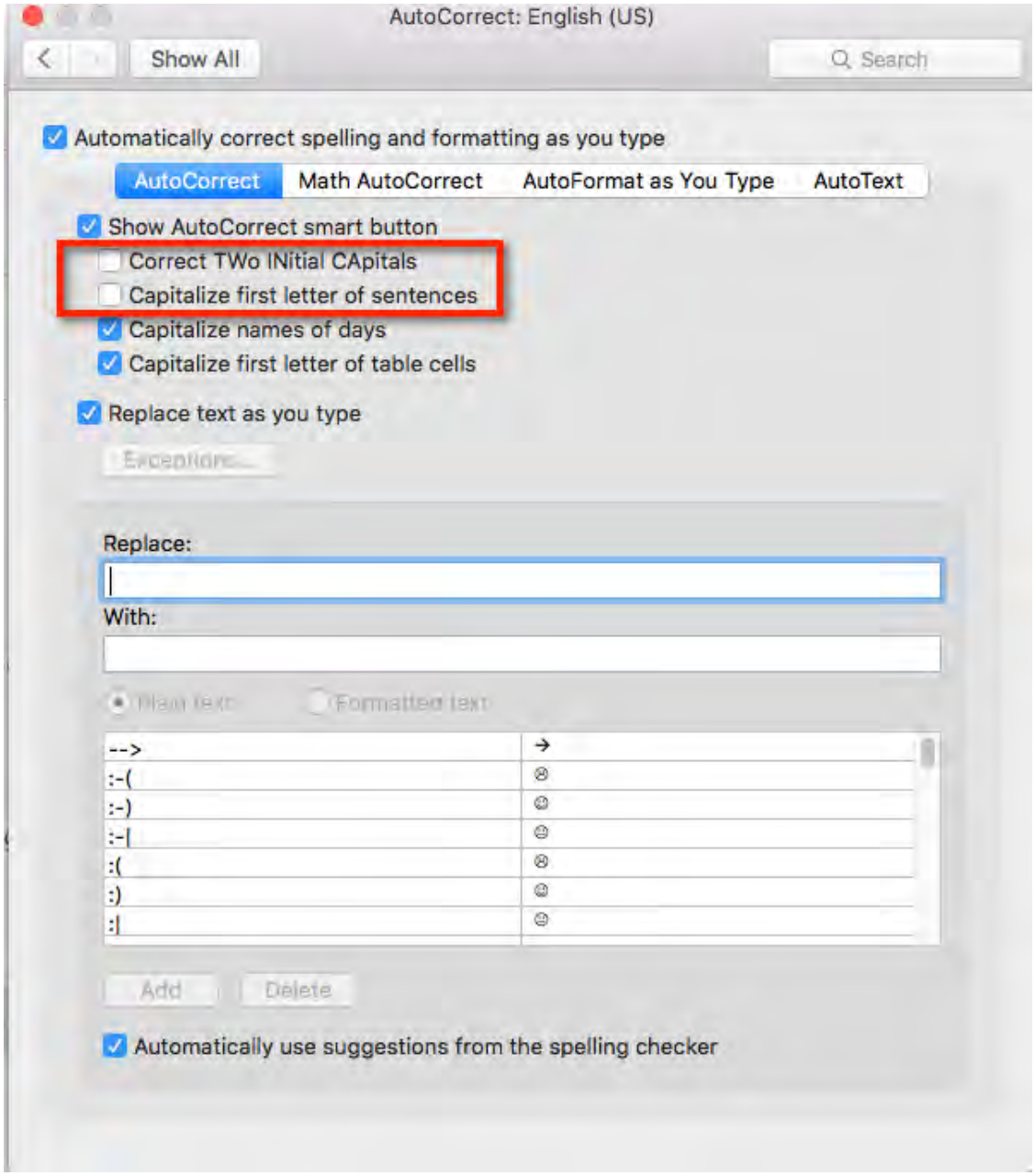
- Uncheck "Include paragraph mark when selecting paragraphs”.

E. **Preferences ➔ Spelling & Grammar**:



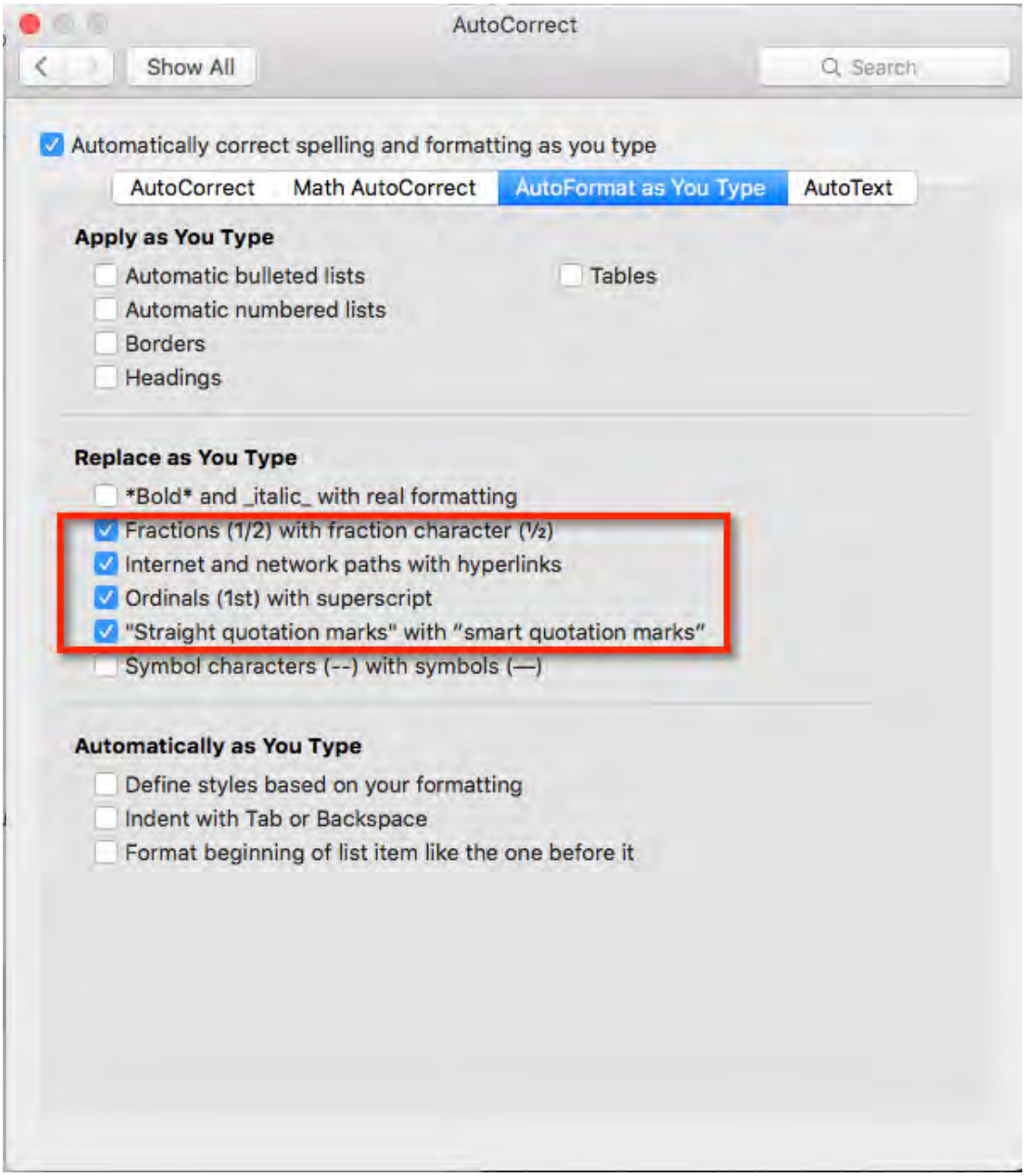
- Uncheck "Ignore words in UPPERCASE". Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.
- Uncheck "Check grammar as you type". This will eliminate the green squiggly lines in the document.
- Uncheck/Check "Check grammar with spelling". Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

F. **Preferences ➔ AutoCorrect**:



- Click on the **"AutoCorrect"** tab. Uncheck Correct TWo INitial CApitals and Capitalize first letter of sentences as most people find that annoying because they MEANT to do it (IDs or cc:).

- Next click on the "Autoformat As You Type" tab.

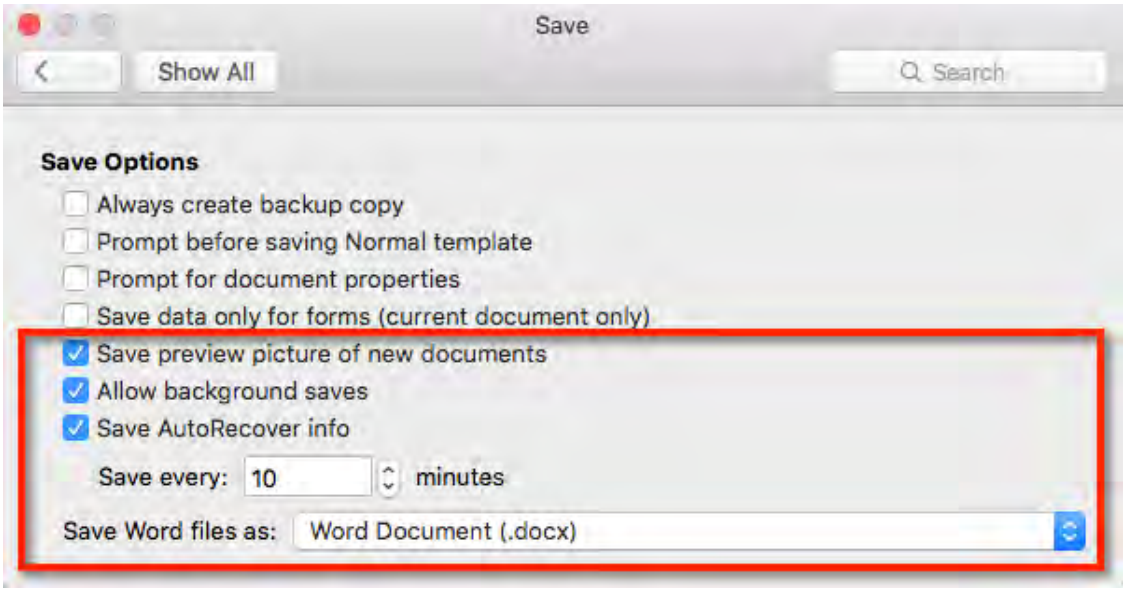


- Uncheck everything except Ordinals and Fractions. Optional items include checking "Internet and network paths with hyperlinks" will create clickable hyperlinks to internet addresses, so that a person opening the document can click on the link and go to the web address right from the document. You might also check the "Straight quotes with smart quotes" but keep in mind that this may result in your quotation marks getting converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

- Be sure to uncheck everything else of this page!! The "Apply as you type" section causes Word to guess what is being typed and start inserting bulleted lists and tables

on its own without any prompting to do so. Also be sure to uncheck "Define styles based on your formatting". This option causes Word to create styles on its own.

G. **Preferences ➔ Save**:

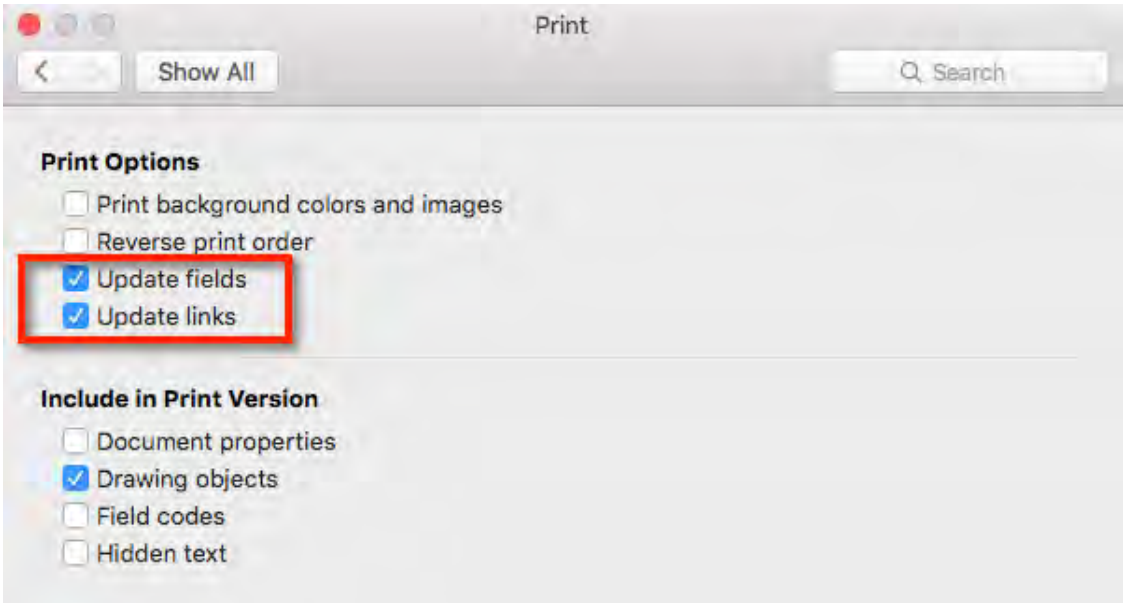


- **Save Preview Picture of New Documents.** This should be checked by default. It creates a preview picture of your document for use by the Finder.

- **AutoRecover Information**: Reduce this to 5 minutes rather than 10. More frequency is a good thing.

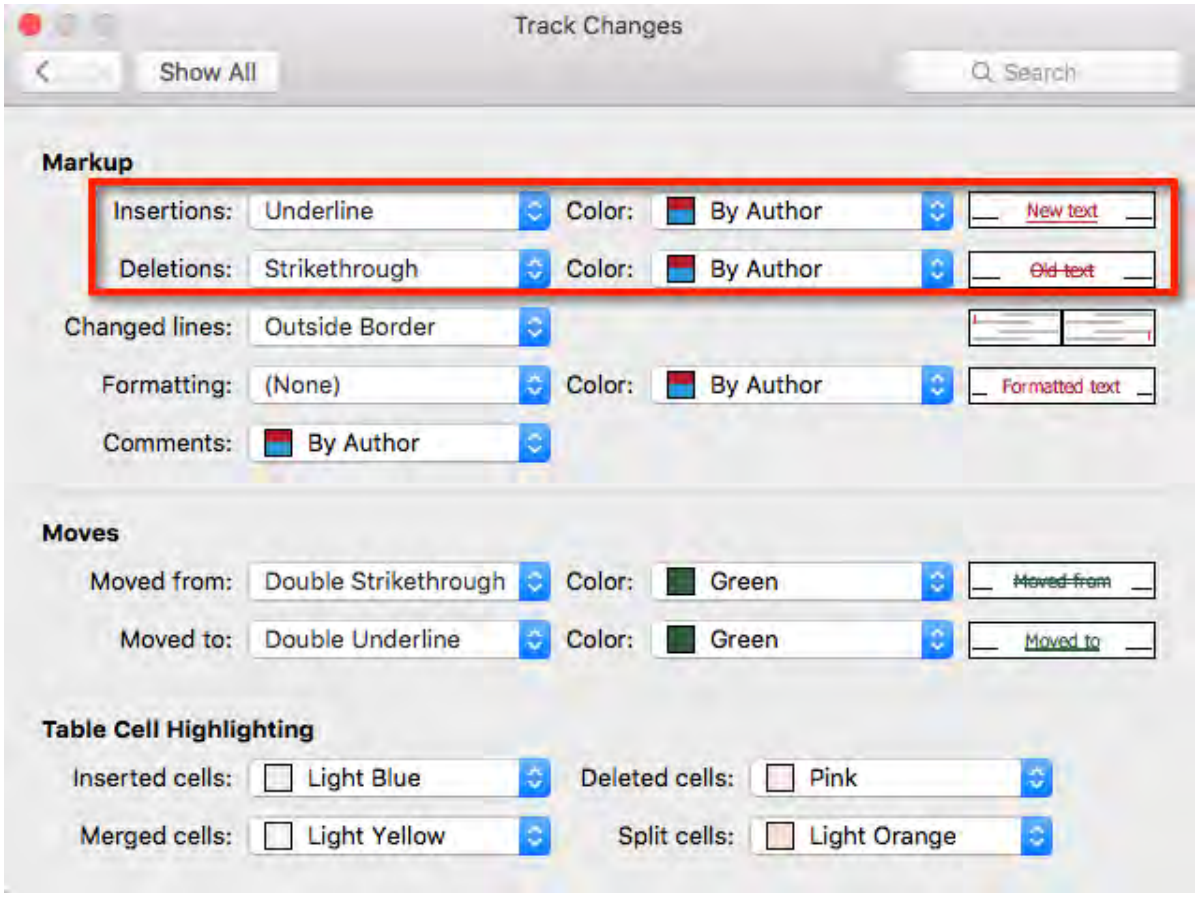
- **Save Word files as:** .docx is the standard Word file format for Word 200, 2010, and 2016 for Windows, and Word 2008, 2016, and 2016 for Macintosh. The only reason to change this default format is if you frequently exchange files with users of Word 2003 for Windows, Word 2004 for Macintosh, or earlier versions.

H. **Preferences ➔ Print**:



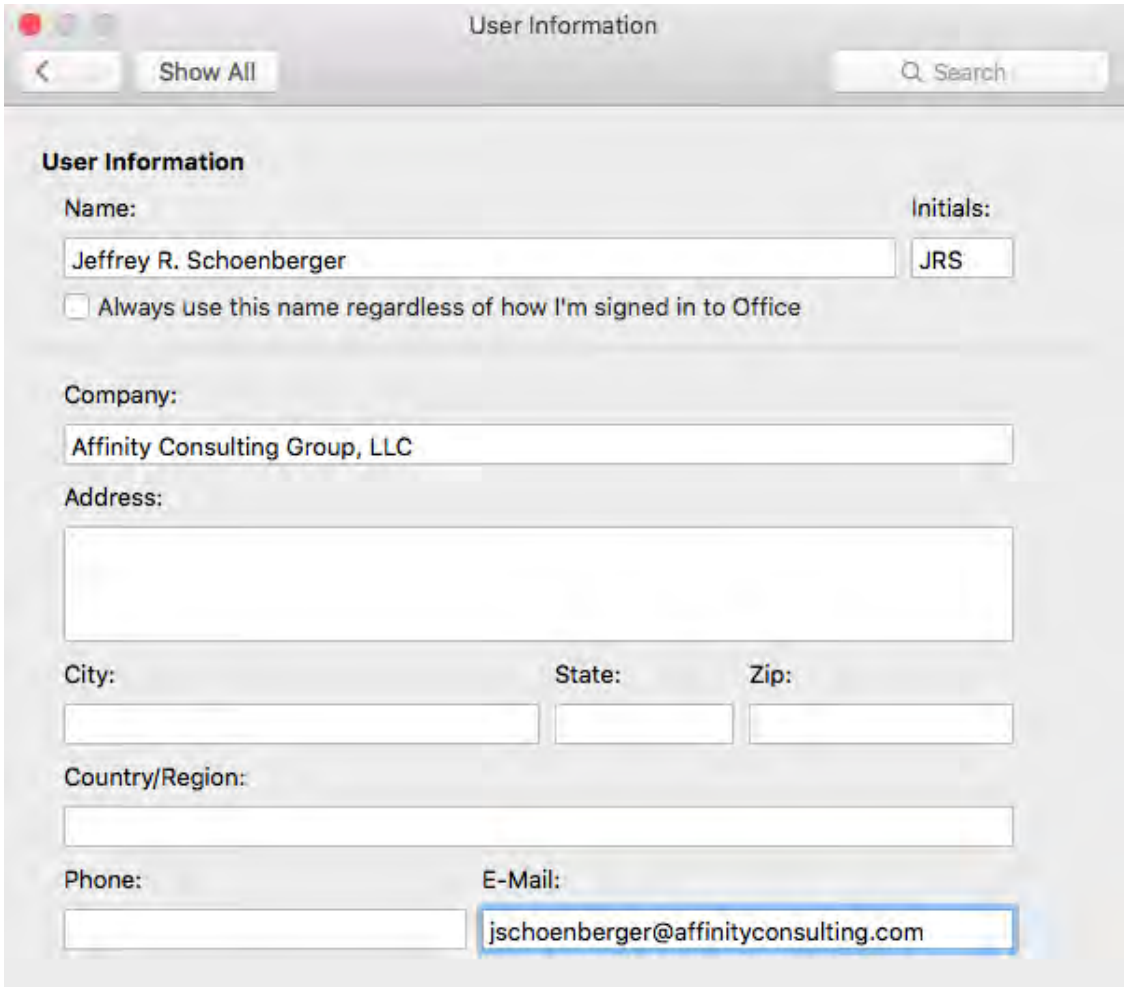
- **Check "Update fields".** Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.
- **Check "Update links".** This will make sure that all linked files are updated before printing.

I. **Preferences ➔ Track Changes**:



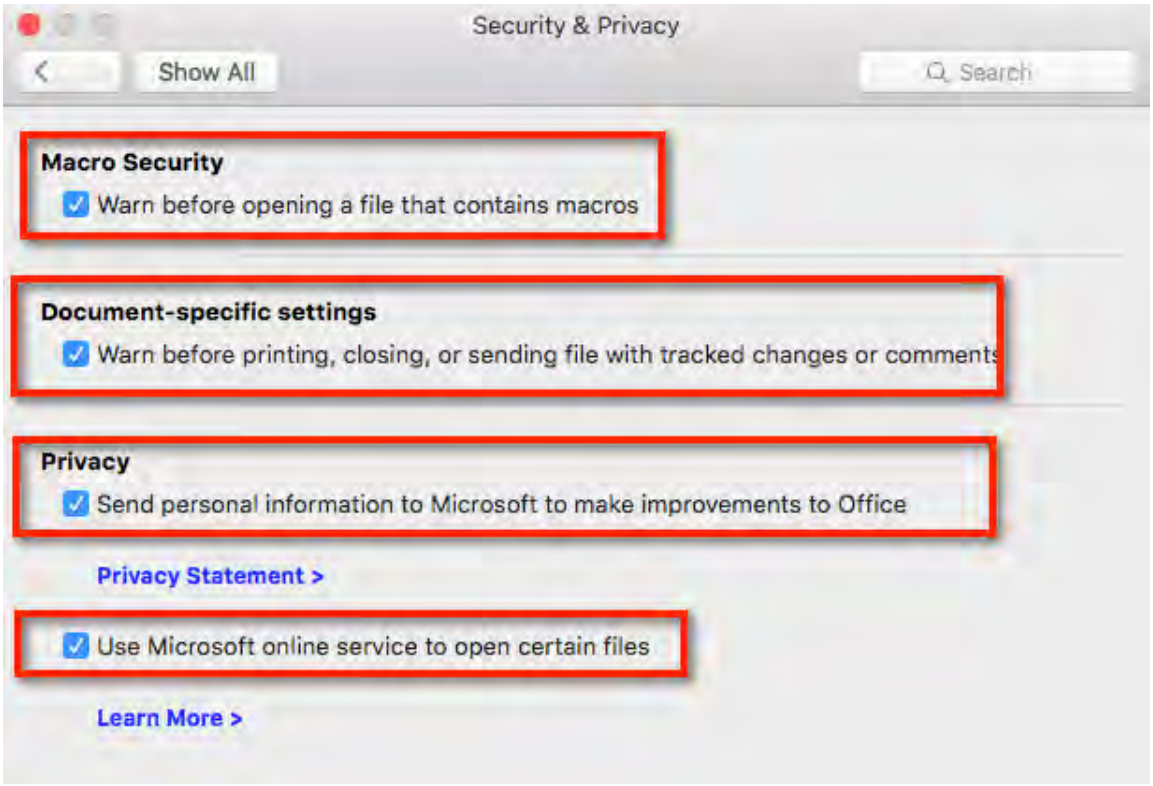
- The only thing to potentially change here is if you would prefer all Insertions to be one color (i.e. blue) and all Deletions to be another (i.e. red). By default, all actions taken by each editor is in a single color.

J. **Preferences ➔ User Information**:



- **Personalization.** Make sure your name and initials are in the appropriate boxes. Word uses that information for tracking changes and other document edits.

K. **Preferences ➔ Security & Privacy**:



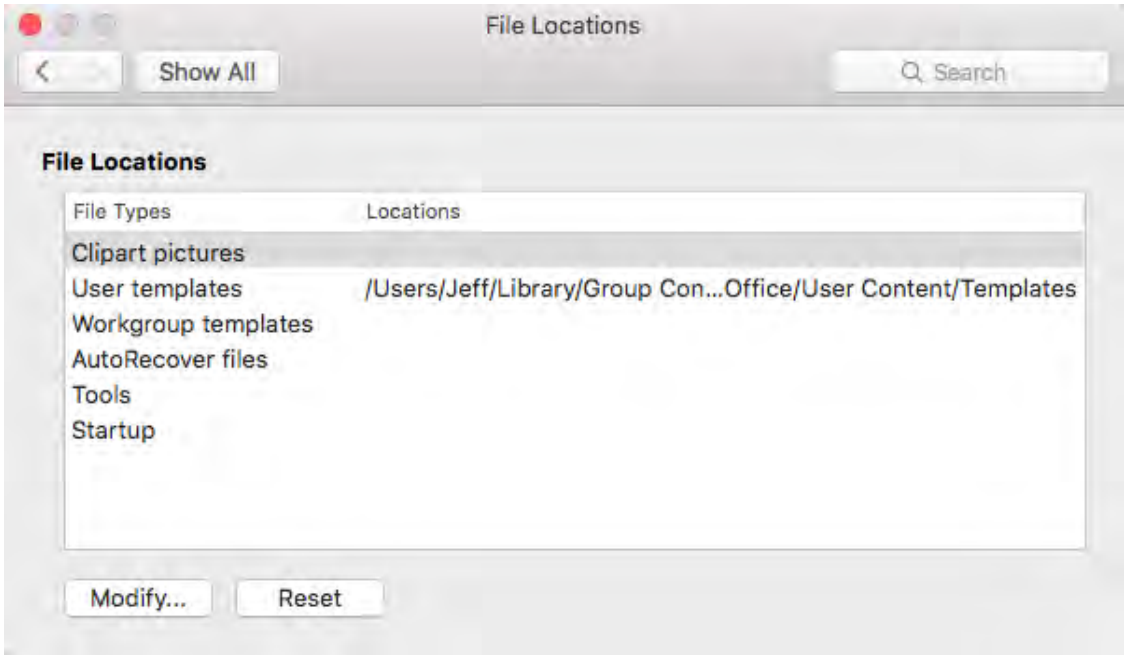
- **Macro Security.** Macros are scripts or tiny programs that run within Word documents. If you want to be notified if the document you're opening contains a macro, check this box.

- **Document-Specific Settings.** This feature will warn you if you are printing, saving, closing, or emailing (from within Word) a document that has unaccepted/unrejected tracked changes or comments. It is the poor man's version of Word for Windows "document inspector" feature. It is not as powerful, but is a good first step.

- **Privacy.** If you want Microsoft to collect data on how you use Word, check the box. If you want to read Microsoft's privacy statement, click here.

- **Online Services.** Check this box if you want Word to be able to open and edit OpenDocument Format files. You are most likely to encounter these file types if a colleague uses OpenOffice, NeoOffice, or LibraOffice - open source word processing programs.

L. **Preferences ➔ File Locations**:

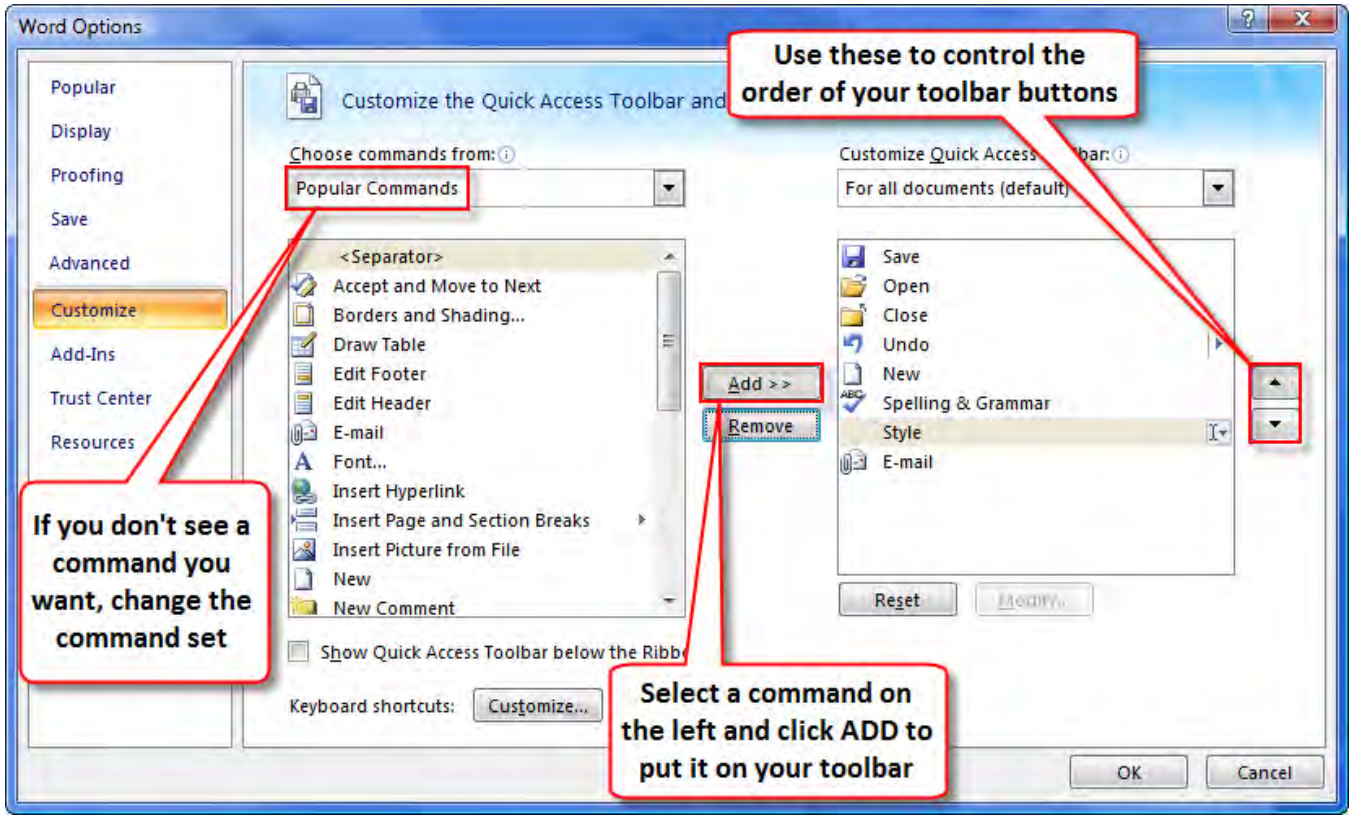


- If you wish, you can change the default locations where Word looks for your documents, templates, etc. Make sure that Word is defaulted to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.

TIP 11 - FIX WORD'S INTERFACE: There are a couple of things you can do to improve Word's interface.

1. **Quick Access Toolbar - Suggested Law Office Modifications**: You can add commands through the Quick Access Toolbar ("QAT") menu by clicking on the icon on the right edge of the toolbar, then choosing More Commands. The menu contains items for the most common commands.

   Select one of the common commands to add it to the toolbar. If your toolbar becomes too long for the top of the screen, in Word 2007, click the drop down arrow on the end of the QAT or in Word 2010/13/16 right-click the QAT, and select Show Below the Ribbon to have it appear below the Ribbon. To add other commands or to change the order of the icons on the toolbar, select More Commands… to bring up the customize options (you can also get to this window in Word 2007 from Office button ➔ Word Options ➔ Customize and in Word 2010/13/16 from File menu ➔ Options ➔ Quick Access Toolbar).

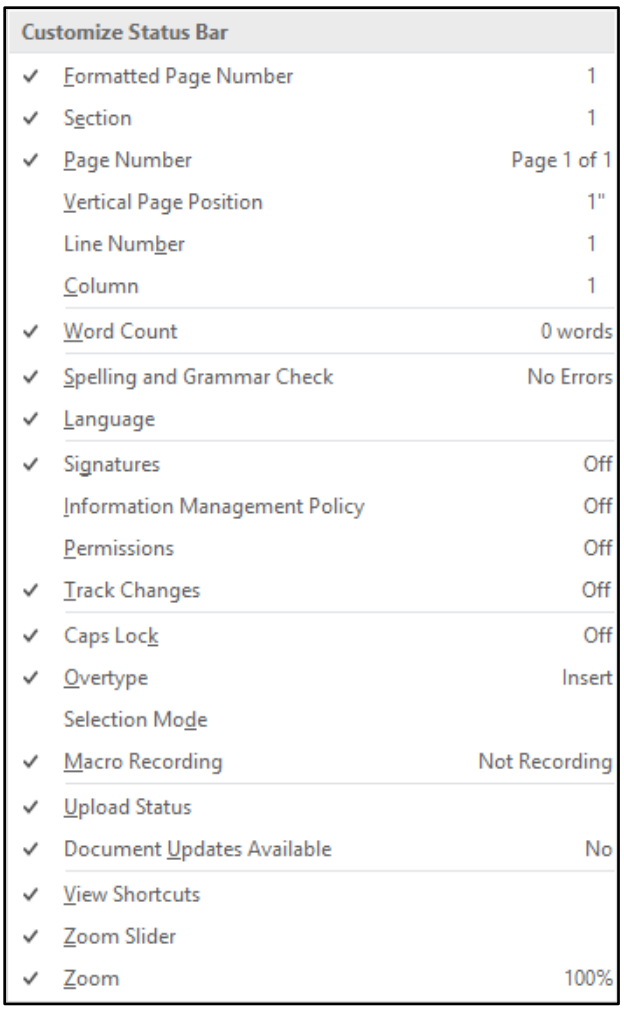


The following are some common options, all of which can be found under the All Commands category (Popular is the default so you'll have to switch it):

- AutoText (it is very important that you add this one)
- Back: Allows you to jump back to where you were in a document when you clicked a hyperlink.
- Calculate: Select any list of numbers or any equation, click this button and it will tell you the result in the status bar at the bottom of the Word window.
- Edit Footer
- Edit Header
- E-mail: Emails the current document as an attachment in one click.
- Envelopes…: This opens the envelopes and labels wizard.
- Inspect document: This removes metadata from your document.
- Organizer: This allows you to easily copy styles from the default template into the document you're working on.

- Page Setup
- Print: This option brings up the print dialog box
- Quick Print: This option prints the open document to the default printer.
- Style Inspector
- Style: Shows you what style is applied to the text your cursor is in.
- Styles…: Opens style window.
- Switch windows command
- Track Changes: Automatically track proposed changes you make to a document.

2. **Customize the Status Bar**: The Status Bar is the bar at the bottom of the word screen which by default shows you the page number, among other things. In prior versions of Word, you could not customize this bar, but you can in Word 2007/10/13/16. Simply right-click the Status Bar and you'll see the options you can add to it. We recommend adding, at a minimum, Formatted Page Number and Section.



3. **Turn On The Ruler**: As you'll see in later chapters, the ruler is extremely important in Word and unfortunately, it is turned off by default in Word 2007. To turn it on, simply open a blank document, click the View ribbon ➔ Word 2007: Show/Hide group or Word 2010/13/16: Show group ➔ check the Ruler box.

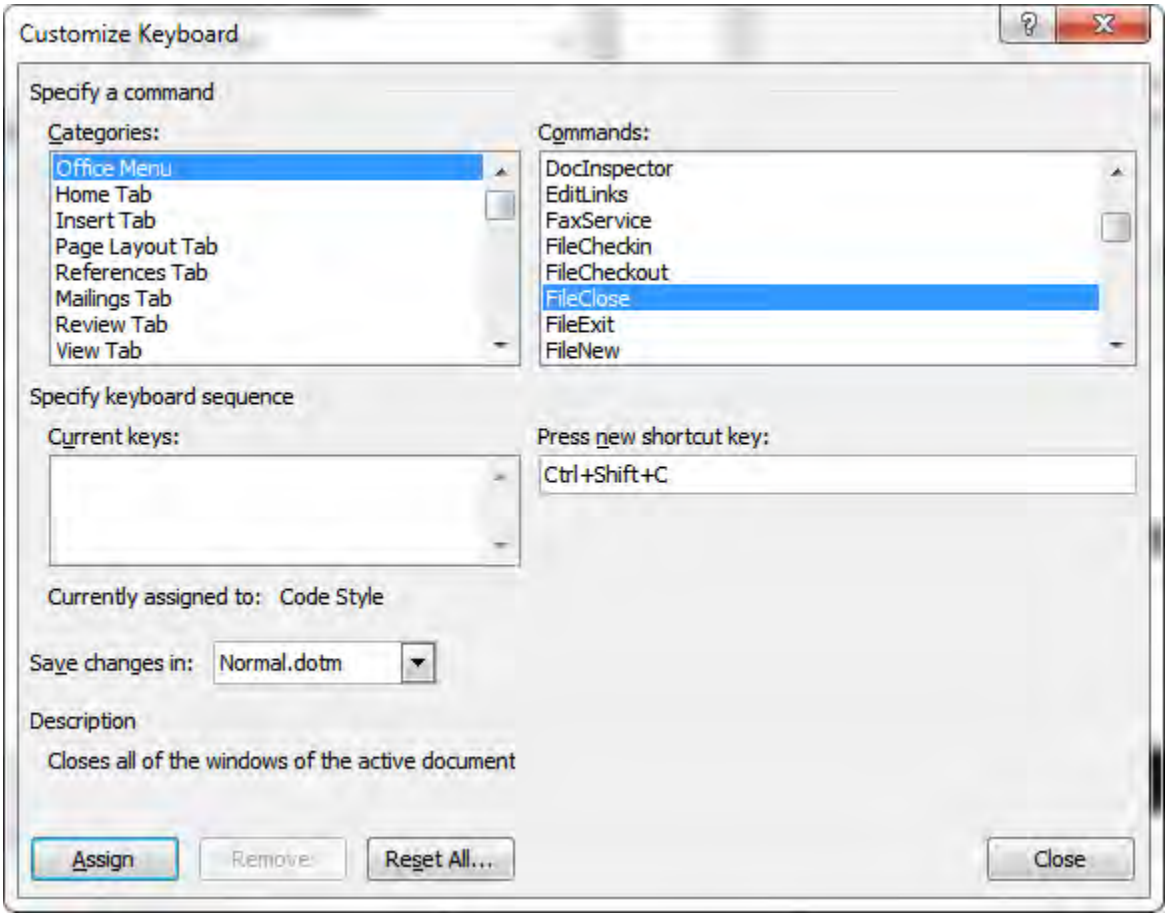
4. **Create Keyboard Shortcuts**: You can assign shortcut keys to anything in Word. This is useful for increasing speed or for re-assigning WordPerfect shortcut keys to do the same things in Word. To customize your keys, follow these steps:

A. In Word 2007, click the Office button ➔ Word Options button; in Word 2010/13/16, click the File menu ➔ Options button.

B. In Word 2007, click the Customize link on the left side ➔ click the Customize… button at the bottom of the screen. In Word 2010/13/16, click the Customize Ribbon button ➔ click the Customize… button at the bottom of the screen.

C. Click on the category you want and the related command appear on the right side of the screen. You may have to hunt for what you're looking for. Once you locate the command

you want to assign a shortcut key to, click once on it so it is highlighted ➔ click into the Press new shortcut key box and hit the key combination you want ➔ click the Assign button ➔ click the Close button.



TIP 12 - THE FORMAT PAINTER CAN SAVE YOU

If you find text formatted the way you like in a document, you can easily replicate it elsewhere using the Home ribbon ➔ Clipboard group ➔ Format Painter button . This is particularly useful when you have some rogue paragraphs which are formatted incorrectly. To use this feature, follow these steps:

1. Click anywhere in the text which is formatted the way you would like (don't select anything). In the example below, paragraph 4 is formatted correctly and paragraph 3 is not. Click somewhere in the middle of paragraph 4. Do not select anything.

3. Non-Use of Confidential Information. Recipient shall not use any Confidential Information for any purpose whatsoever other than for the Permitted Purpose, and shall not communicate or disclose that the Company has provided Confidential Information except in accordance with this Agreement.

4. Enforcement. Each of the Company and Recipient agree that a breach of this Agreement will give rise to irreparable injury to the Company for which damages may not be adequate compensation, and consequently, that the Company shall be entitled, in addition to all other remedies available to it at law or in equity, to injunctive and other equitable relief to prevent a breach of this Agreement and to secure the specific performance of this Agreement without the necessity of posting bond (to the extent enforceable under applicable law) or proving lack of adequate remedy at law, and without limitation of other remedies available to the Company at law or in equity.

2. Click the Home ribbon ➔ Clipboard group ➔ single click the Format Painter button

. You'll notice that your mouse pointer turns into a brush.

3. Apply the same formatting to other text by selecting the text you want to reformat (left-clicking, holding down the left mouse button and dragging the mouse pointer over the text - i.e., select the entire paragraph). Make sure you include the hard return at the end of the target paragraph. In the example referenced above, select paragraph 3. Now it looks like this:

3. Non-Use of Confidential Information. Recipient shall not use any Confidential Information for any purpose whatsoever other than for the Permitted Purpose, and shall not communicate or disclose that the Company has provided Confidential Information except in accordance with this Agreement.

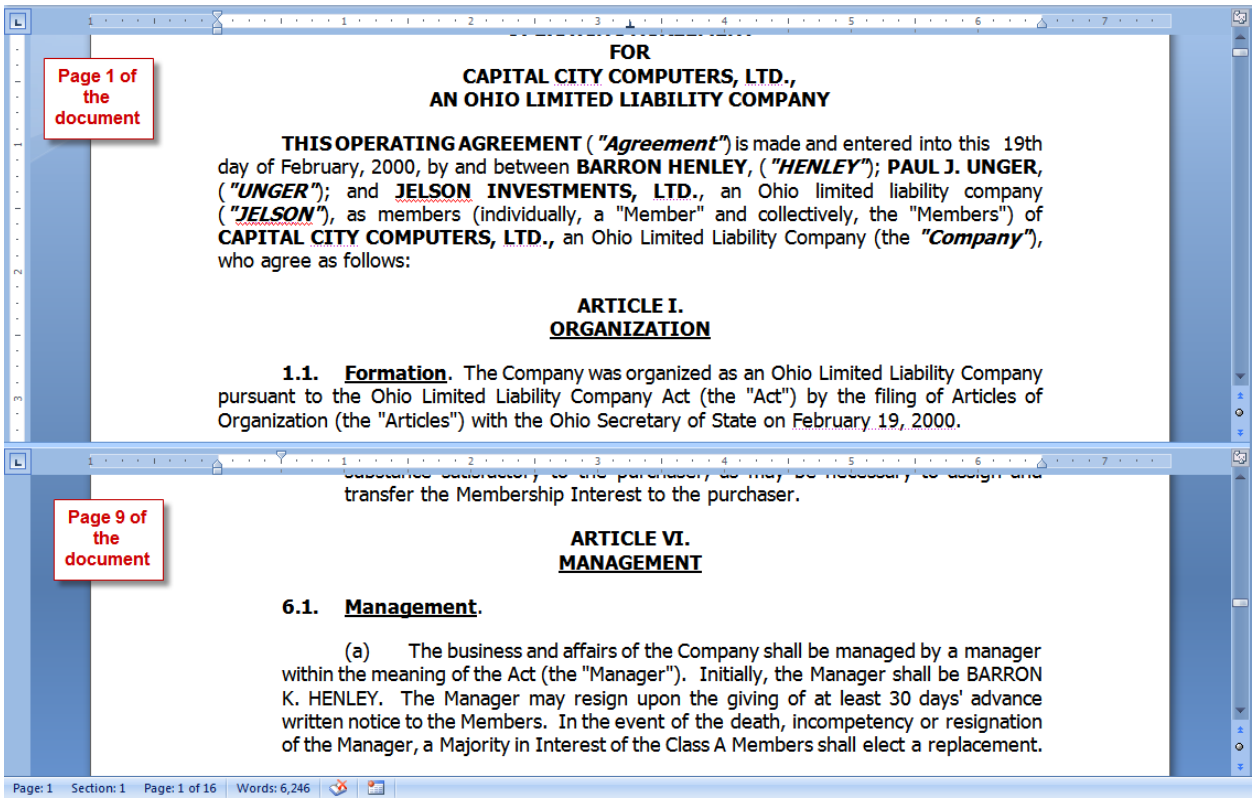
4. Enforcement. Each of the Company and Recipient agree that a breach of this Agreement will give rise to irreparable injury to the Company for which damages may not be adequate compensation, and consequently, that the Company shall be entitled, in addition to all other remedies available to it at law or in equity, to injunctive and other equitable relief to prevent a breach of this Agreement and to secure the specific performance of this Agreement without the necessity of posting bond (to the extent enforceable under applicable law) or proving lack of adequate remedy at law, and without limitation of other remedies available to the Company at law or in equity.

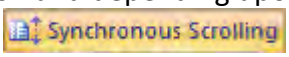
After you release the mouse button, the Format Painter automatically turns off. If you want to turn on the Format Painter and keep it on until you're done selecting multiple sections of text, double-click the Format Painter button. When you're done, single click the button and it will turn off again.

TIP 13 - VIEWING TWO SECTIONS OF A DOCUMENT SIMULTANEOUSLY: There are often circumstances when you're drafting one part of a document but need to see another part of the document as the same time for reference purposes. For example, while drafting, I might need to see the names of all of the parties in the first paragraph or a definitions section at the end. There are two main ways to accomplish this.

1. **Splitting a Document**: If you have ONE monitor, this is particularly useful. To do this, open the document you want to edit. Click the View ribbon ➔ Window group ➔ Split button. Now a gray bar will appear roughly in the middle of your document. In 2007/10, wherever it is when you left-click, it will split your document at that point. In Word 2013/16, it will automatically split the screen in half. Thereafter, you can scroll up and down in each half of your document

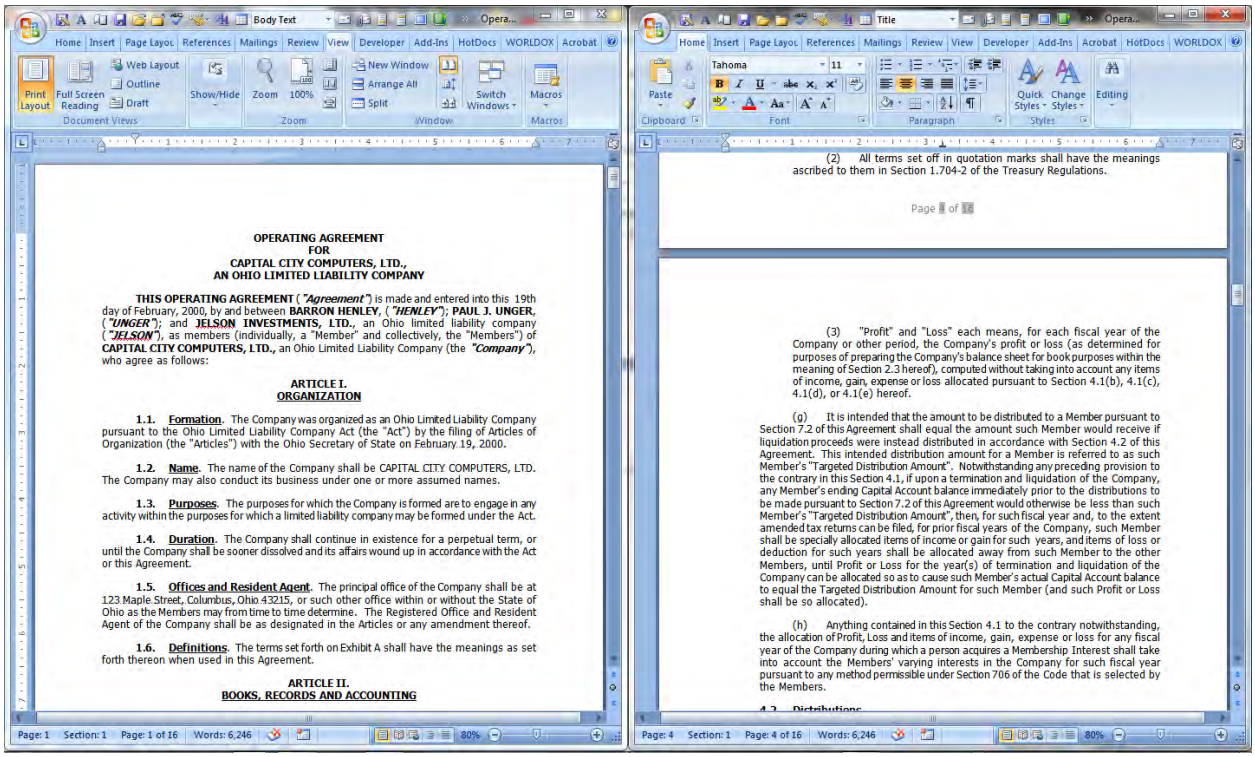
independently. To go back to a single document view, click the View ribbon ➔ Window group ➔ Remove Split button or drag the gray bar up into the ribbon until it disappears.



2. **Viewing Same Document in Side By Side Windows**: If you have a wide-screen monitor or more than one monitor, this is particularly useful. It allows you to view one section of the document on the left side of your screen and another section of the same document on the right. First, open the document you want to edit. Then, click the View ribbon ➔ Window group ➔ New Window button (this opens the same document in a second window). While still in the View ribbon, click the View Side by Side button. If you get a choice of documents to choose from, choose the one you originally opened. Now you'll see the same document on the left and right side of your screen. In order to browse to different parts of each one, you need to turn off Synchronous Scrolling. This button is in the View ribbon and depending upon how wide your screen is, it may just be a button or a labeled button 

. To turn off this view, simply click the View Side by Side button in the View ribbon or

. To get rid of the second window, just click the close button in the second window.



TIP 14 - WHEN PASTING TEXT, STRIP THE FORMATTING: If you copy text from one document (or another program) into the document you're editing, you can often bring along with that text formatting attributes that create problems in the document you're editing. Therefore, best practices are to remove all of the formatting when you paste the text. This will allow the text to absorb the formatting of the document you're pasting into. Word make this a pretty easy task.

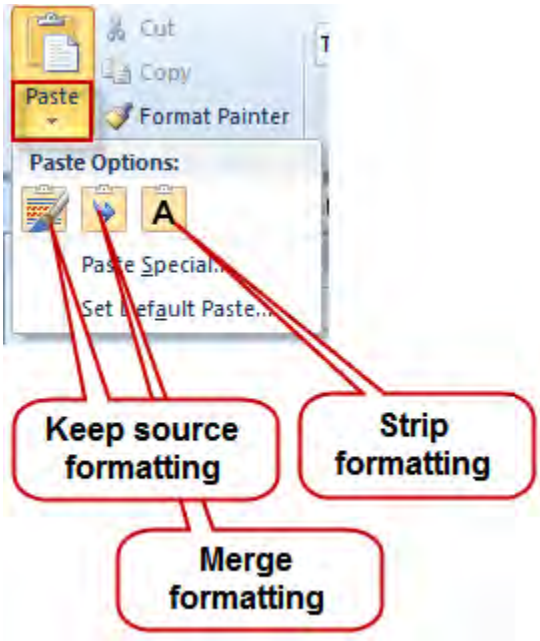
1. **Basic Copy and Paste**:

   A. Select the text you want to copy.

   B. Click the Home ribbon ➔ Clipboard group ➔ Copy button

(SK: Ctrl + C).

   C. Place your cursor where you want to place the copied text and hit the Home ribbon ➔ Clipboard group ➔ Paste button (SK: Ctrl + V). Note, the Paste button has two parts (top and bottom). To do a straight paste, you need to click the top half of the Paste button. The bottom half of the button presents you with options in Word 2010/13/16 only:



2. **To Move (Cut and Paste)**:

   A. Select the text you want to copy.

   B. Click the Home ribbon ➔ Clipboard group ➔ Cut button

(SK: Ctrl + X).

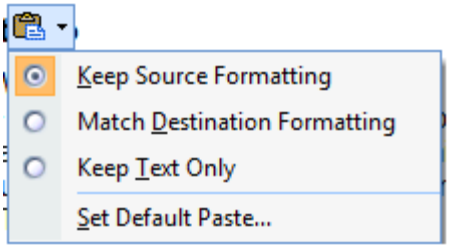
   C. Place your cursor where you want to place the copied text and click the Home ribbon ➔ Clipboard group ➔ Paste button (SK: Ctrl + V).

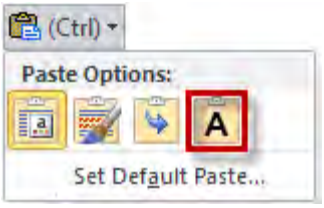
3. **Drag and Drop Text Editing**: If this feature allows you to select text, place the cursor anywhere in the highlighted area, hold down on the left mouse button and drag the text to another location (or program).

4. **Paste Options Button**: The Paste Options button appears just below your pasted selection after you paste text.

   When you click the button, a list appears that lets you determine how the information is pasted into your document. The available options depend on the type of content you are pasting, the program you are pasting from, and the format of the destination document.

5. **Strip Formatting After You Paste**: Many Word users have struggled with formatting glitches that arise when one pastes text from one document into another which contains different formatting. The Paste Options button addresses this by giving the user the option to keep the source formatting, match the destination formatting or strip the formatting (Keep Text Only). The screen shot below is from Word 2007 and the screen shot on the right is from Word 2010/13/16.





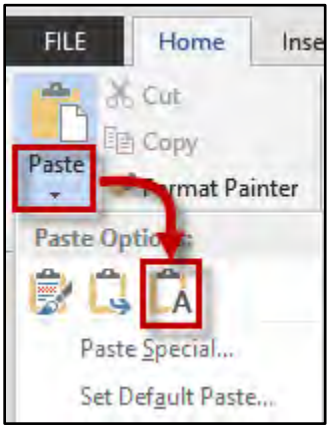
6. **Strip Formatting When You Paste**: If you've ever copied the text from a case or statute you've found on-line (Lexis, West, CaseMaker, Fastcase, etc.) into a document in Word, then you've probably encountered formatting problems. In many cases, the text and formatting in the target document gets screwed up the second you click "paste." This is particularly true when copying from the Internet because the pasted text often retains the graphics, tables and HTML formatting that it had on the Internet. A great way to avoid this problem is to follow these steps paste "unformatted text":

   A. Select and copy the text you want from an Internet web page or any other program;

   B. Open the document in Word (or WordPerfect) into which you want to paste the text;

   C. In Word 2007, click the Home ribbon → Clipboard group → bottom half of the Paste button. Select Paste Special → Unformatted text.

      In Word 2010/13/16, click the Home ribbon → Clipboard group → bottom half of the Paste button → the button. The text will assume the formatting of the target document and, in the case of text from a web page, it will be stripped of all graphics and other bothersome formatting characteristics.



TIP 15 - NEVER USE EXTRA HARD RETURNS TO CREATE VERTICAL PARAGRAPH SPACING: Many legal documents have single spaced paragraphs with an extra blank line between each paragraph (as this manual is formatted). Using extra hard returns to accomplish this violates two of the aforementioned rules because it is repetitive and annoying and requires more (rather than fewer) keystrokes. Further, it makes it easy to end up with too many lines between paragraphs or not enough. In fact, this is one of

the things that Word users routinely look for and fix before printing a document. Word has a feature for creating vertical space between paragraphs automatically. It's fast, requires fewer keystrokes and will never allow you to end up with too much or not enough space between paragraphs.

1. **Accessing Automatic Spacing Settings**: If you want your paragraphs single spaced but you want a double space between each paragraph, the proper approach is to let Word control spacing not only within but, also, between paragraphs. You can get to this setting by either of the following steps:

   A. Click the Home ribbon ➔ Paragraph launcher ➔ Indents and Spacing tab, or

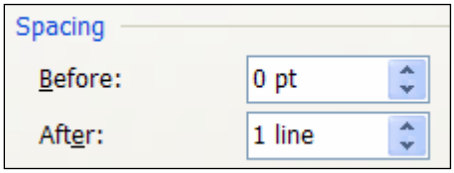
   B. Right click your paragraph ➔ Paragraph ➔ Indents and Spacing tab

2. **Spacing Measurements**: Generally, 6 points of space is a half line; 12 points is a full line; 18 points is one and a half lines and 24 points is two lines.

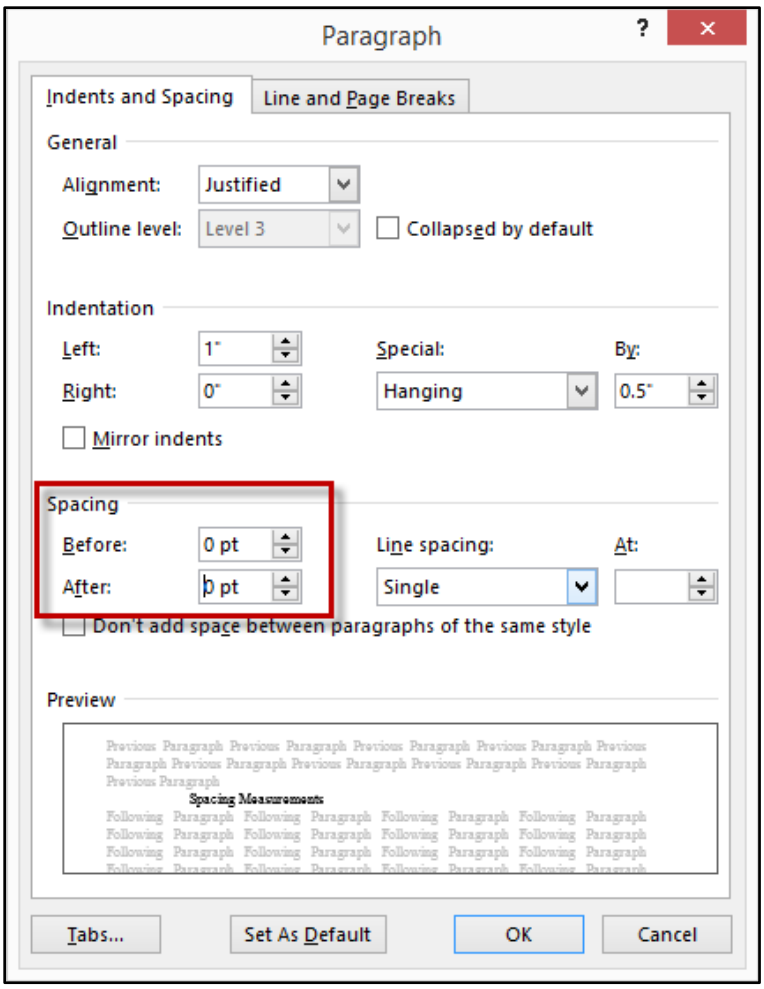
3. **Spacing Before**: If you would like Word to automatically insert an extra space *above* each paragraph, use Spacing Before. Make the Spacing Before 12 pt. This will add a double space above each single spaced paragraph.

4. **Spacing After**: You can do the same thing as above, but the space will occur *after* each paragraph. Just follow the steps listed for Spacing Before only add the points to Spacing After.

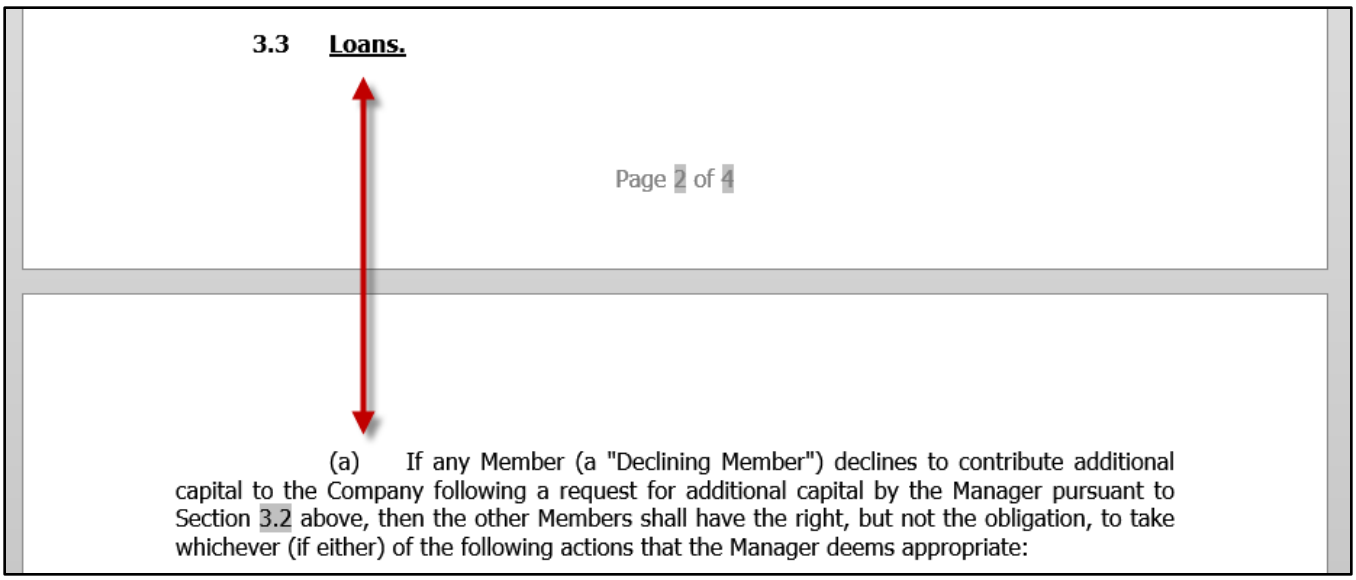
5. **Using Lines Rather Than Points**: If you find the point system confusing, you can always erase the "pt" measure and type "1 line". If you switch from points to lines, the up and down arrows will make adjustments in those terms.



6. **Easiest Way To Apply These Settings**: First, make sure you don't have extra, unnecessary hard returns between your paragraphs. Now select the paragraphs you want to add spacing to ➔ right click anywhere in the highlighted text ➔ Paragraph ➔ Indents and Spacing Tab ➔ make your adjustments ➔ click the OK button.

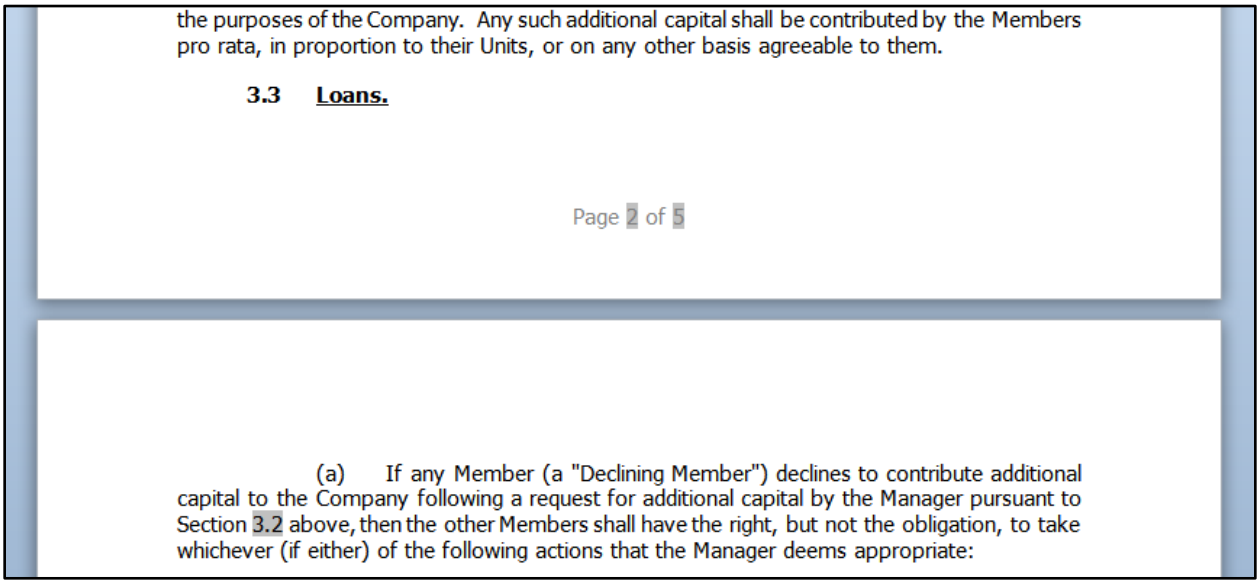


TIP 16 - USE PARAGRAPH GLUE: In other words, if you have the issue below, never add hard returns or a page break before the title. All that approach does is create the likely possibility that you're going to end up with too much space between paragraphs as you edit the document. Instead, you'll use a special feature I call paragraph glue which will attach the title to any paragraph that follows it.



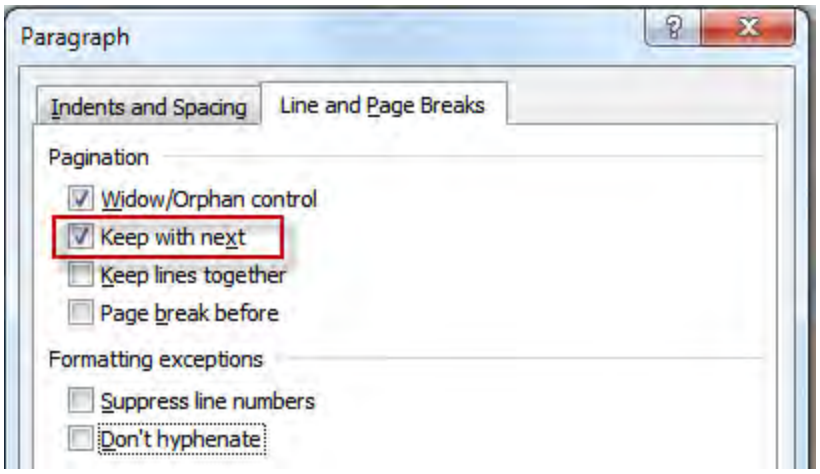
1. **To Keep Paragraphs Together**: This function keeps different paragraphs together on the same page.

   A. Click your cursor into the paragraph *under which* you want to apply glue. Don't select anything, just click. In the screen shot below, you would simply place your cursor in the paragraph entitled "Loans". You would *not* select paragraphs 3.3 and (a) because that would result in gluing together more paragraphs than you intend.

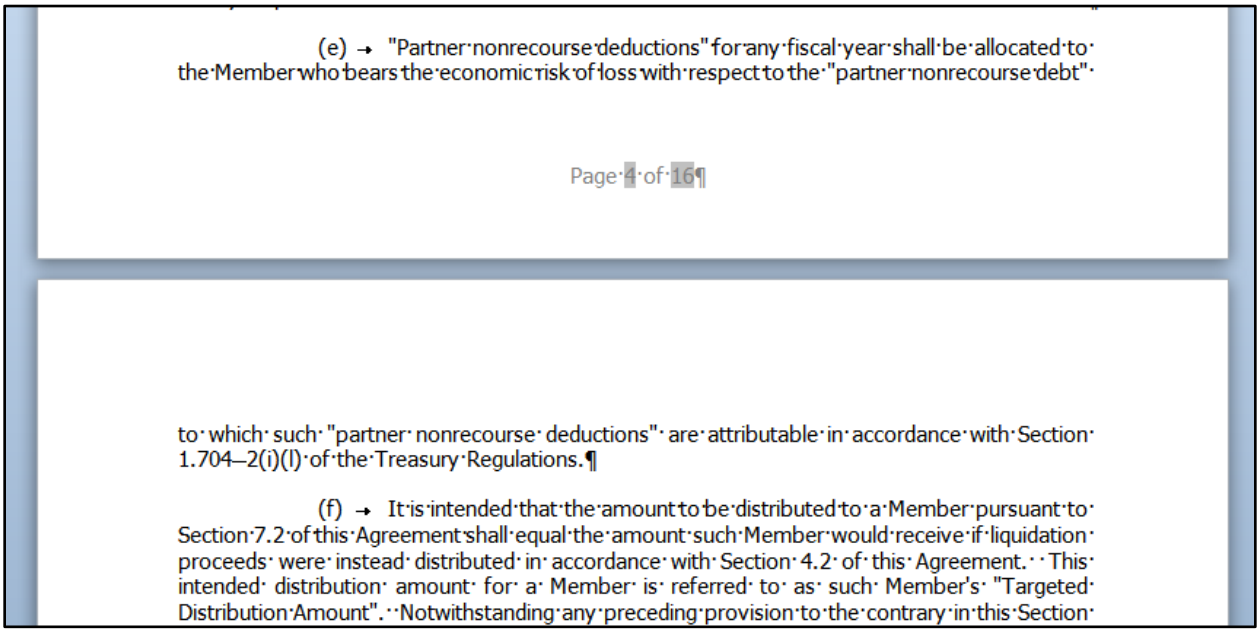


   B. Either right-click the paragraph and choose Paragraph from the menu that appears - or - click the Home ribbon ➔ Paragraph launcher. Once you're in the Paragraph dialog, click the Line and Page Breaks tab.

C. Check the Keep lines together box and the Keep with next box and click OK. Leave the Orphan/Widow box selected.



2. To Keep Text within a Paragraph Together: This function keeps the lines from a paragraph or paragraphs from being broken by a natural page break. For example, in the screen shot below, I don't necessarily want to glue paragraph (e) to paragraph (f); but I want to keep (e) together on the same page since it's only 3½ lines.


(e) → "Partner nonrecourse deductions" for any fiscal year shall be allocated to the Member who bears the economic risk of loss with respect to the "partner nonrecourse debt"

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to which such "partner nonrecourse deductions" are attributable in accordance with Section 1.704–2(i)(l) of the Treasury Regulations.

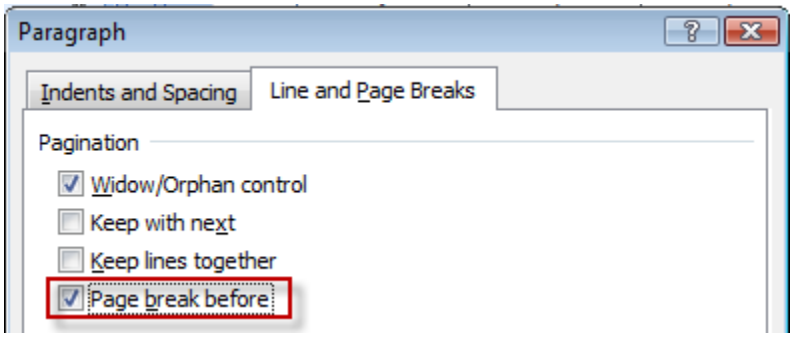
(f) → It is intended that the amount to be distributed to a Member pursuant to Section 7.2 of this Agreement shall equal the amount such Member would receive if liquidation proceeds were instead distributed in accordance with Section 4.2 of this Agreement. This intended distribution amount for a Member is referred to as such Member's "Targeted Distribution Amount". Notwithstanding any preceding provision to the contrary in this Section

A. To take care of this issue, place your cursor anywhere in the paragraph in which you'd like to keep the lines together.

B. Either right-click the paragraph and choose Paragraph from the menu that appears - or - click the Home ribbon ➔ Paragraph launcher ➔ Line and Page Breaks tab.

C. Check the Keep lines together box. Leave the Orphan/Widow box selected.

3. **Automatically Start a Paragraph at the Top of a New Page**: Instead of inserting hard page breaks before paragraphs which you want to begin at the top of a page, use the "page break before" formatting option (Home ribbon ➔ Paragraph launcher ➔ Line and Page Break tab).



4. **TIP - What To Do If You Experience Bizarre Page Breaks**: Sometimes, if they're applied to too many consecutive paragraphs, Keep with next and Keep lines together can conspire to produce strange page breaks. To visually determine whether this is the source of the problem, click the Home ribbon ➔ Paragraph group ➔ Show/Hide button ¶ and look for **Paragraph Position Marks**. These are black dots which appear in the left margin which indicate that Keep with next or Keep lines together have been applied. You can double-click the dots to quickly access the Line and Page Breaks dialog.

TIP 17 - TABS FOR SIGNATURE LINES: Word's tab stops are set, by default, every one-half inch. So, unless you specify otherwise, every time you hit the Tab key, the cursor will advance to the next half-inch mark on the Horizontal Ruler. The default tab stops are Left tabs (described below).

1. **Change the Default Tab Stops**:

   A. Click the Home ribbon ➔ Paragraph launcher (or right-click anywhere in the document and choose Paragraph) ➔ Tabs… button in the dialog.

   B. Change the Default tab stops dropdown setting to the desired increment (perhaps every one inch).

   C. Click OK when finished.

2. **Types of Tabs**: Word has five types of tab stops: Left, Center, Right, Decimal and Bar. These tab stops are easily inserted into a document by clicking on the Tab Alignment Box and clicking on the Horizontal Ruler. If you do not see the horizontal ruler, click the View ribbon ➔ Show/hide group (Word 2007) Show group (Word 2010/13/16) ➔ check the Ruler box.

   A. Left tab: Text entered after this tab is left-aligned.

   B. Center tab: Text entered after this tab is centered.

   C. Right tab: Text entered after this tab is right-aligned.

D. Decimal tab: Numbers entered after this tab are aligned along their decimal point (or just after the last numeral if there is no decimal point).

E. Bar tab: Inserts a vertical line into the document.

3. Set Custom Tab Stops Using Tab Selector Box: It is important to note that when you manually insert a tab stop, it nullifies all of the default tab stops to the left of the manually inserted tab stop.

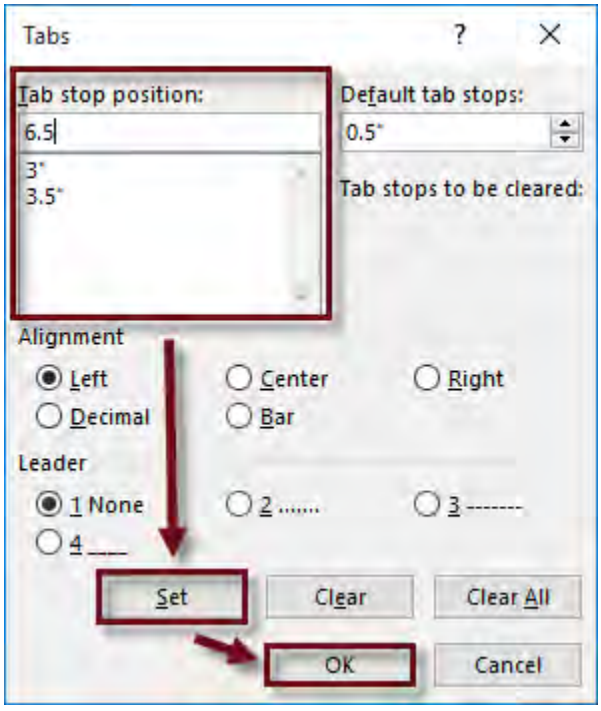
A. Click the Tab Selector Box (the small box at the far left of the Horizontal Ruler) until you see the type of tab stop you want to insert. Repeatedly clicking on the Tab Alignment Box will cycle you through all the available tab stops. If you can't see the Tab Selector Box on your screen, you need to turn on the Ruler first. Click the View ribbon ➔ check the box adjacent to Ruler in the Show group.

B. When the type of tab stop you want to insert is displayed in the Tab Alignment Box, click on the Horizontal Ruler at the place you want to set the tab stop (see below for examples).

Left	Bar	Center	Right	Decimal
Facility		**Physician**	**Patient**	**Bill Amount**
Riverside Hospital		Dr. Doolittle	Elvis Presley	$587.21
Grant Hospital		Dr. Pain	Orville Reddenbocker	$6,110.60
Park Medical Center		Dr. Welby	Wilt Chamberlain	$12,662.30

As you can see above, the tab stops line up the text beneath them by their name (right, left, center, decimal). The bar tabs are not really tab stops; they merely insert vertical lines wherever they're placed.

4. Set Custom Tab Stops Using Tabs Dialog: Right click the line of text where you want to add a tab ➔ choose Paragraph from the dialog that appears ➔ click the Tabs… button. Now enter your tab settings into the dialog and click the Set button after you enter each one. When you're done, just click OK.



5. **Clear Specific Tabs**: Click and drag the undesired tab from the Horizontal Ruler into the document area. Once you release the left mouse button, the tab will disappear.

6. **Clear All Tabs**:

   A. Highlight the desired paragraphs or the entire document (SK: Ctrl + A).

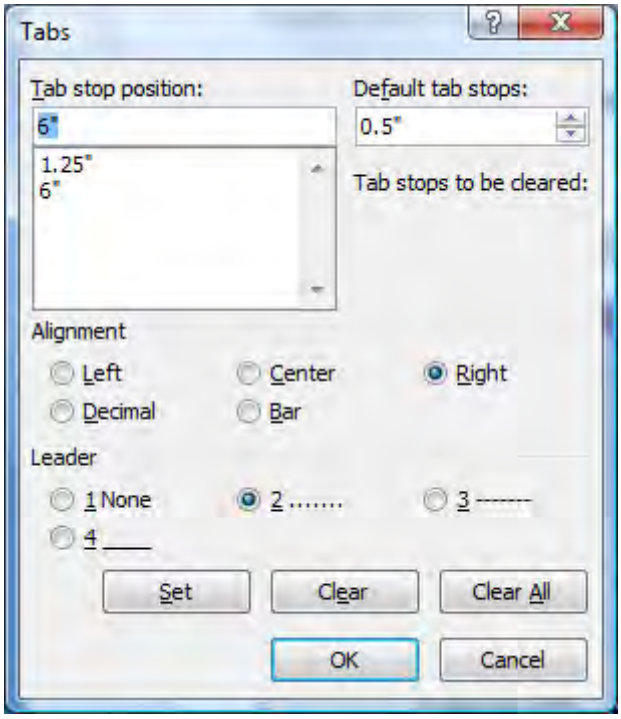
   B. Click the Home ribbon ➔ Paragraph launcher ➔ Tabs… button**.**

   C. Click the Clear All button.

   If you want to clear all of the tabs from a paragraph, click in the paragraph and hit Ctrl + Q. This will clear all paragraph formatting, including tabs.

7. **Tab Leaders**: Tab Leaders fill the empty space before tab stops with dots, dashes or underscores. For an example, follow these steps:

   A. Click the Home ribbon ➔ Paragraph launcher ➔ Tabs.. button. Add a RIGHT tab at 6" and click the #2 dot leader.



B. Now type "Chapter 1", hit the Tab key, then type "13" so it looks like this:

Chapter 1..... 13

C. As you can see, the tab leader filled in the blank between "Chapter 1" and the page number, 13.

8. Signature Lines:

A. **It's Incorrect To Create Signature Lines With Underscores or Tables**: Thanks to proportional font spacing, it's nearly impossible to get lines made with underscores the same length as any other line. Further, when you print them, you can often see the little notches between the characters; and you cannot type on them. Tables are the #1 cause of corrupted Word documents and are frankly unnecessary for signature lines. Instead, you should use tab stops to create signature lines in your documents.

B. **How To Create Signature Lines With Tabs**: Here's the best way to set up signature lines. Just follow these steps:

i. Set your left and right page margins at 1 inch (Page Layout ribbon ➔ Page Set up group ➔ Margins).

ii. Click Home ribbon ➔ Paragraph launcher ➔ Tabs… button.

iii. Set a left tab stop at 3 inches, 3.5 inches, and 6.5 inches with NO leader.

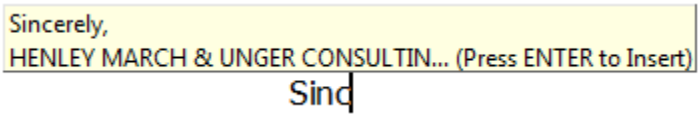
iv. Click OK.

v. Now turn on Underline by clicking the Home ribbon ➔ Font group ➔ Underline button (SK: Ctrl + U), hit a tab key; turn off Underline by clicking on the Underline button again (SK: Ctrl + U) and hit another tab key; turn on Underline again and hit another tab key. Hit Enter twice, then another tab key. You should have perfect witness and signature lines as shown below:

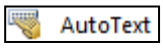
_____ _____

_____ _____

TIP 18 - LEARN TO USE AUTOTEXT: If you've used Word 2003 or prior versions, then you're probably familiar with this feature. This was a favorite feature for many users of Word 2003 and prior versions. AutoText provided an easy way to insert repetitive blocks of text into your documents quickly (like your signature block). One of the best things about the feature was that if you started typing the name of an AutoText entry, a little window would appear and if you hit Enter, it would simply insert your entry (see example screen shot below).



1. **What Happened to AutoText in Word 2007**: AutoText still exists in Word 2007, but you'll have to dig for it. And sadly, the little yellow window you see above will no longer appear when you type the name of an entry. AutoText is now a subset or category of a new feature called Quick Parts which is explained below. Interestingly, AutoText entries are a type (or subset) of Quick Parts which feature is described below.

2. **Accessing AutoText in Word 2007**: The only way you're going to get to it is to add the AutoText button to your Quick Access Toolbar. Instructions for this are under Quick Access Toolbar Modifications on page 137. The button you need to add is under All Commands, and it looks like this: 

.

3. **AutoText in Word 2010/13/16**: It is exactly the same as Word 2007, *except* that now the auto-complete box does appear when you start typing an AutoText name just like it did in Word 2003.

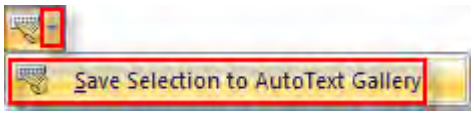
4. **Accessing AutoText in Word 2010/13/16**: You can add AutoText to the Quick Access Toolbar or you can access it by going to the Insert ribbon ➔ Text Group ➔ Quick Parts button arrow ➔ Auto Text.

5. **Create AutoText Entries**:

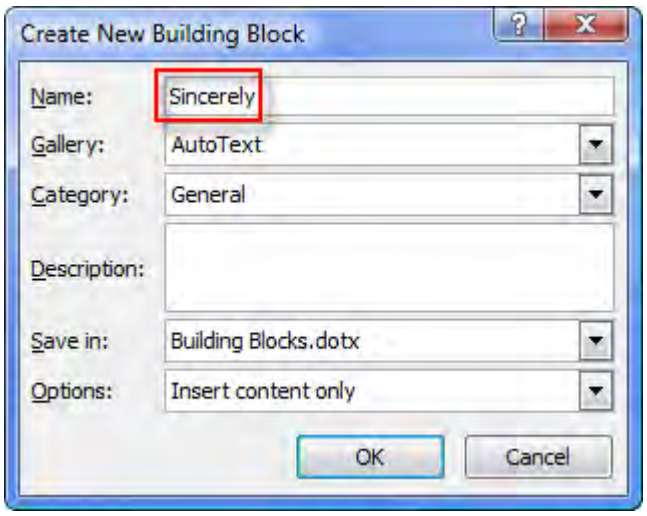
   A. Type the text you commonly re-use (or find it in an existing document).

B. Select (highlight) the text.

C. In the Quick Access Toolbar click the AutoText button arrow ➔ Save Selection to AutoText Gallery or in Word 2010/13/16 click on the Insert ribbon ➔ Text Group ➔ Quick Parts button arrow ➔ Auto Text ➔ Save Selection to AutoText Gallery.

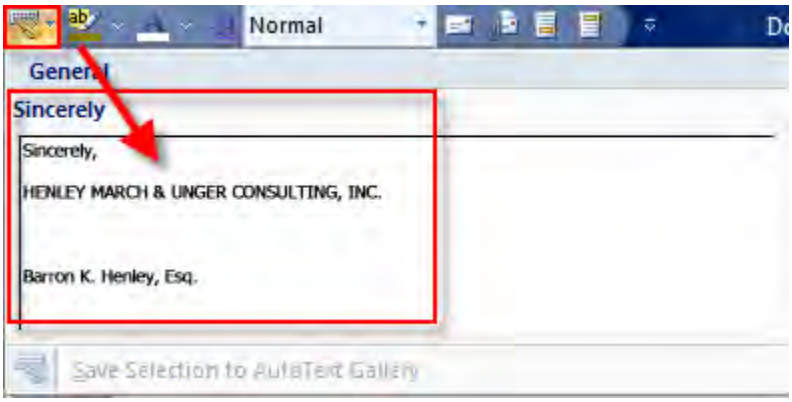


D. Give the AutoText entry a name and click OK.



6. Insert an AutoText Entry Into Your Document: There are three ways to do this:

A. Click the AutoText button in the Quick Access Toolbar ➔ select the appropriate AutoText Entry.



B. In Word 2010/13/16 click the Insert ribbon ➔ Text Group ➔ Quick Parts button arrow ➔ Auto Text ➔ then click the appropriate AutoText entry.

or

C. Type a few letters of the name of the entry➔hit F3**.**

TIP 19 - SECTION BREAKS ARE REQUIRED TO CONTROL PAGE NUMBERING: If you want to control page numbering, get it to start over at 1 or turn it off in the middle of the document, or you want to switch from Romanettes (i) to Arabic (1), you must understand how to use section breaks.

1. Our Advice on Page Numbering:

A. **There Are Two Ways to Add Page Numbers**: Word allows you to create page numbering in footers or headers of documents via two methods. The first method is to use the Insert ribbon ➔ Header & Footer Group ➔ Page Number button. The second method is to insert it directly into the header or footer, as discussed below.

B. **Problem With Page Number Button**: If you click the Page Number button ➔ Top of Page or Bottom of Page ➔ and choose a format, you'll find that doing so will delete anything you had previously typed in the footer or header that you're adding the page number to. Further, Word adds an unnecessary, extra hard return after the page number which you're going to have to delete. We have received countless tech support calls regarding this issue from frustrated Word users. Most recently, a caller was using a letterhead template which already had a footer on each page of the firm's address and phone number. Every time the caller tried to insert a page number using Page Number button ➔ Bottom of Page ➔ Plain Number centered, it would delete the firm address and phone number from the footer and *replace* it with a page number and unnecessary extra hard return. Follow the next set of steps for adding page numbers that will work every time.

2. Page Numbers Manually Inserted into a Header or Footer:

A. Click the Insert ribbon ➔ Header & Footer group ➔ Footer button ➔ Edit Footer.

B. Put your cursor where you'd like the page number in the header/footer ➔ click on the Header & Footer Tools ribbon ➔ Header & Footer group ➔ Page Number button ➔ Current Position ➔ Plain Number.

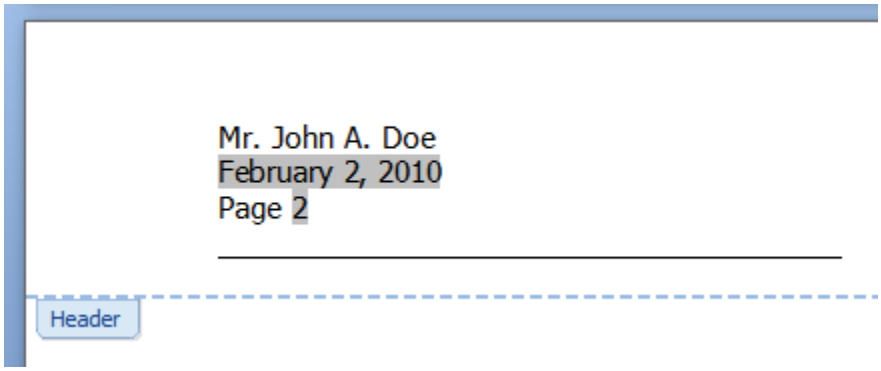
C. Click the Header & Footer Tools ribbon ➔ Close group ➔ Close Header and Footer button to close the Header/Footer ribbon and revise the body of your document.

Follow the foregoing steps every single time and you'll have no problems with page numbering.

3. Insert the Total Number of Pages in the Document: To insert the total number of pages in the document when you are editing a headnote or footnote (Insert ribbon ➔ Header & Footer group ➔ Footer button ➔ Edit Footer), click on the Header & Footer tools ribbon ➔ Insert group ➔ Quick Parts button ➔ Field button ➔ set Categories to All ➔ set Field names to NumPages ➔ set the Field Properties to how you would like the number of pages displayed ➔ OK.

4. Number All Pages Except The First:

A. **When This Is Appropriate**: We often do not want to page number the first page but want to number second and subsequent. Another relevant example would be a letter in which you want no page numbering on the first page because it will be printed on letterhead, but you would like to add a header on all subsequent pages that looks something like this:



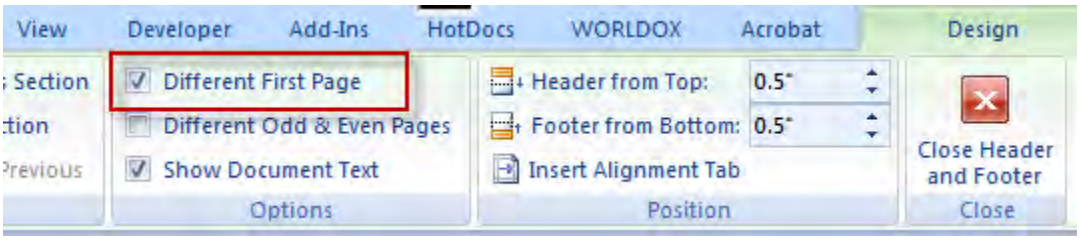
B. **How To Set It Up**: This is most easily illustrated with an example. Assume you have a 3 page document and you'd like to number pages 2 and 3 only. Simply follow these steps:

i. Open the document in Word that you want to page number.

ii. Click the Insert ribbon ➔ Header & Footer group ➔ Footer button ➔ Edit Footer. Click the Home ribbon ➔ Paragraph group ➔ Center button (SK: Ctrl + E) to center your cursor in the footer.

iii. In Header & Footer Tools ribbon, which appears because you're editing the Footer, click the Header & Footer group ➔ Page Number button ➔ Current Position ➔ Plain Number (which will insert a page number where your cursor was).

iv. In order to turn off the page numbering for page 1 (but leave it for all of the other pages), click on the Header and Footer Tools ribbon ➔ Options group ➔ check the Different First Page box.



v. The foregoing step will *remove* the page number from page 1 but leave it on all subsequent pages.

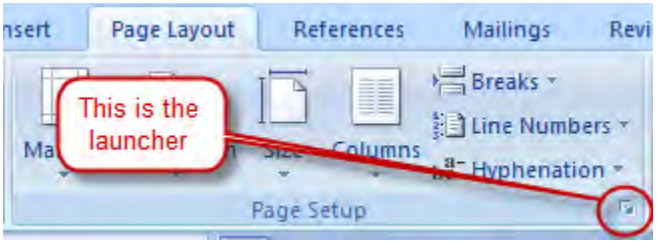
vi. Click the Header & Footer Tools Ribbon ➔ Close group ➔ Close Header and Footer button and you're done!

5. Create Page Numbering within Multi-Section Documents:

A. **What Is a Multi-Section Document?** A multi-section document is any document which contains section breaks. In this particular case, we're talking about documents in which you must start the page numbering over or switch the page numbering format somewhere in the middle of the document.

B. **Page Numbering Rules**: Page numbering in multi-section documents is not particularly easy, so we've devised the Affinity Page Numbering Rules to help you. Following these rules will save your hours of frustration. You'll see their application as we walk through the example below:

i. **First Page Numbering Rule**: If you don't want to number the first page, then you must click the Page Layout ribbon ➔ Page Setup launcher ➔ Layout tab ➔ check the Different first page check box.

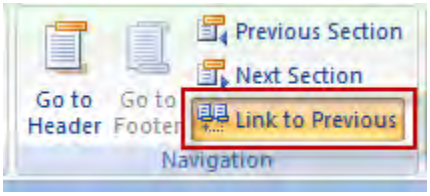


ii. **Start Over Section Break Rule**: Within a document, if you want to start page numbering over again at 1, change the numbering format, or turn off page numbering altogether, then you must insert a Section Break into your document. Insert the Section Break immediately before the place you intend to make the numbering change. (To insert a Section Break: Page Layout ribbon ➔ Page Setup group ➔ Breaks button ➔ select the type of break you would like to insert.

iii. **Always Read The Labels Rule**: Always read the header/footer labels. They will tell you where you're at in the document and what's going on. Read first, THEN act. The labels you're looking for look like this:

iv. **Same as Previous Is Evil Rule**: If you see the Same as Previous label, then the header or footer you're looking at is LINKED to the one in the previous section.

That means that if you modify it while it's linked, it will change the header/footer in the previous section. Therefore, you'll almost always want to turn this evil feature off. You turn it off by turning off the Link to Previous button on the Header & Footer Tools ribbon ➔ Navigation group ➔ click the Link to Previous button to turn it off.



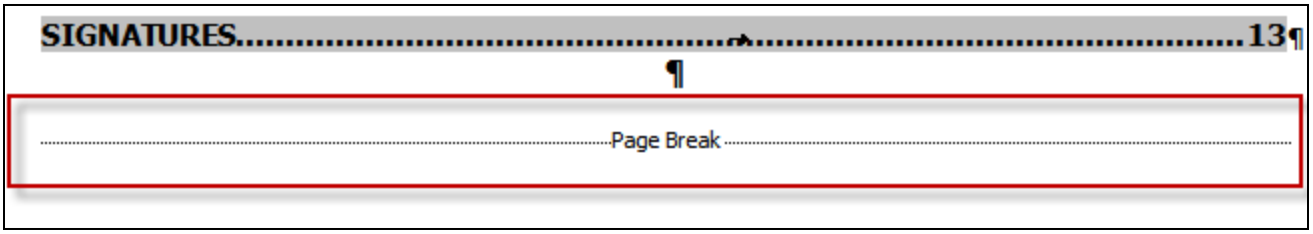
v. **Cut The Link, Then Act Rule**: If you see the evil Same as Previous label, you must resist the temptation to modify the header or footer until you cut the link between the sections. The purpose of this rule is to remind you that you need to cut the link FIRST, then make your changes. If you change first, then cut the link, it's too late and you've already changed the header or footer in the previous section.

vi. **Always Click Into The Header/Footer You Want to Modify Rule**: If you want to make a change to a particular header or footer, you must remember to insert your cursor into that header or footer before you do anything. This is an important rule because you can be VIEWING a footer in section 2 (for example), but your cursor is still in the footer in section 1 of the previous page. If you make any changes, section 1 is going to be affected since that's where your cursor is.

6. **Example**: In this example, we've got a Physician Recruitment Agreement which is comprised of a 2 page table of contents on physical pages 1 - 2 of the document. The body of the Agreement begins on physical page 3 and runs 11 more pages. Therefore, the document has a total of 13 pages. On every page of the table of contents, we want page numbers with Roman numerals. On physical page 3 of the document, which is the first page of the body of the Agreement, we want no page number at all. Thereafter (beginning on physical page 4 of the document), we want page numbering with the format "2 of 11," "3 of 11," etc. for the remainder of the document. None of these page numbers will be typed, they will all be fields that auto-calculate. Follow these steps:

A. First, since we intend to start page numbering over between the table of contents and the body of the document, the **Start Over Section Break Rule** above dictates that we must have a section break after the table of contents for that to be possible.

Open your document, turn on the Show Hide button ¶ (Home ribbon ➔ Paragraph group ➔ Show Hide button**)** so you can see page and section breaks and go to the bottom of the table of contents to see what is there. We see the following screen shot, so we know this is not a section break, it's just a page break and that won't help us.



B. Place your cursor immediately to the left of the page break line and hit the **Delete** key on your keyboard. Now you'll see the title of the body of the document, "PHYSICIAN RECRUITMENT AGREEMENT," appears immediately to the right of your cursor.

C. Leave your cursor where it is, then click Page Layout ribbon ➔ Breaks button in the Page Setup group ➔ click Next Page under Section Breaks. Now you've got the necessary section break between the table of contents and the body of the document. Your table of contents is now Section 1 and the rest of the document is Section 2.

D. Go to page 1 of your document (hit **Ctrl** + **Home**), then click the Insert ribbon ➔ Footer button ➔ Edit Footer. You cursor should be in the Footer, Section 1. If that isn't what the label says, then move up or down as necessary to get into the first page footer of section 1.

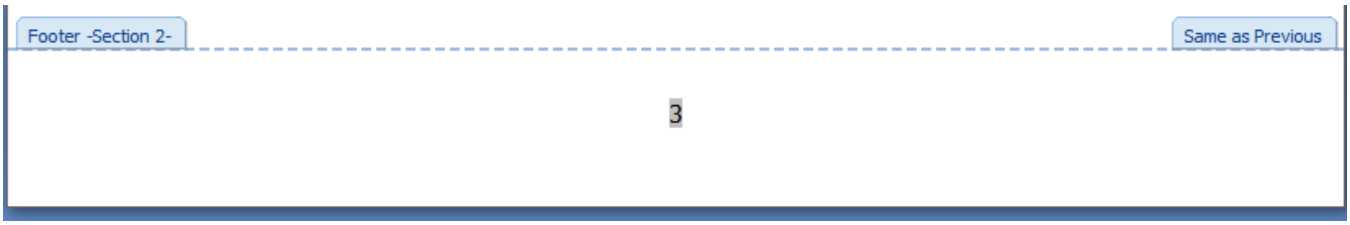
E. Remember that we want every page of the table of contents to have a page number on it. Therefore, we must remember the **First Page Numbering Rule** which says that if you *don't* want to number the first page, then you must check the Different First Page checkbox which you can easily access from the Header & Footer Tools ribbon. Click on that ribbon and check to see if the box is checked (it shouldn't be). Since we *do* want to number the first page, we need to make sure this box *isn't* checked. Once you become familiar with how Word handles headers and footers, you would know immediately that the box wasn't checked because of the label on the footer. Our label says **Footer -Section 1-**. If the **Different first page** box were checked, the label would have read **First Page Footer -Section 1-**.

F. We want to put a page number in the footer of page 1 so follow the **Always Click Into The Header/Footer You Want to Modify Rule** and click into that footer. Now click the Page Number button on the Header & Footer Tools ribbon ➔ Current Position ➔ Plain Number. Now center it by hitting **Ctrl** + **E**.

G. To switch the number from Arabic to small Roman Numerals (i, ii, iii...), click the Header & Footer Tools ribbon ➔ Page Number button ➔ Format Page Numbers and switch to small Roman Numerals with the drop down menu adjacent to **Number format**.

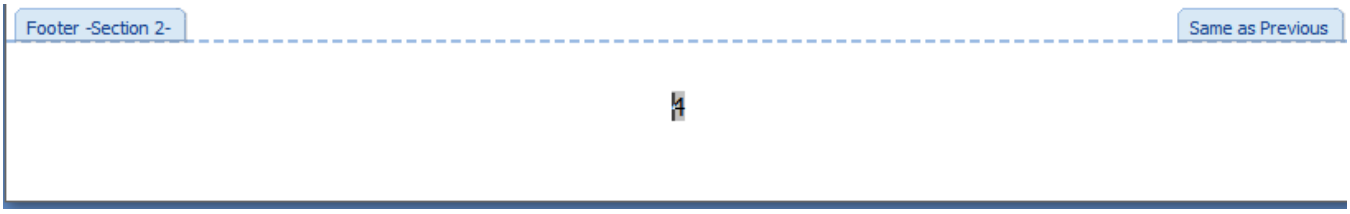
H. Scroll down to page 2 and you should see that there is a "ii" in the footer of that page. Section 1 is done.

I. Now scroll down to the footer on page 3 and follow the **Always Read The Labels Rule**. This footer is not at all what we want:



J. Remember that we don't want a page number on the first page of the body of the document, so we need to follow the **First Page Numbering Rule**. In the Header & Footer Tools ribbon ➔ in the Options group, check Different First page. Once you do that, your label changes as in the following screenshot and the page number disappears. Word assumes that if you check the **Different first page** box, then you don't want to number the first page. You can always insert a page number if you want to, but in this case, Word's assumption is correct.

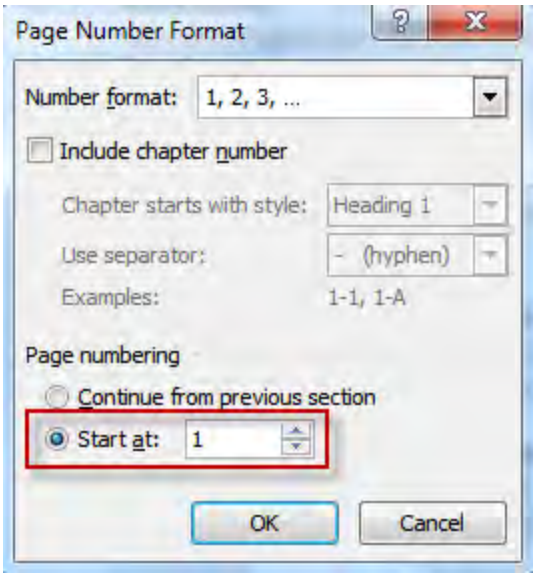
K. Now scroll down to the footer on physical page 4. Again, this is not at all what we want because it should say **Page 2 of 11**, not **4**.



L. Now, three rules come into play: the Start Over Section Break Rule, the Same As Previous Is Evil Rule and the Cut The Link, Then Act Rule.

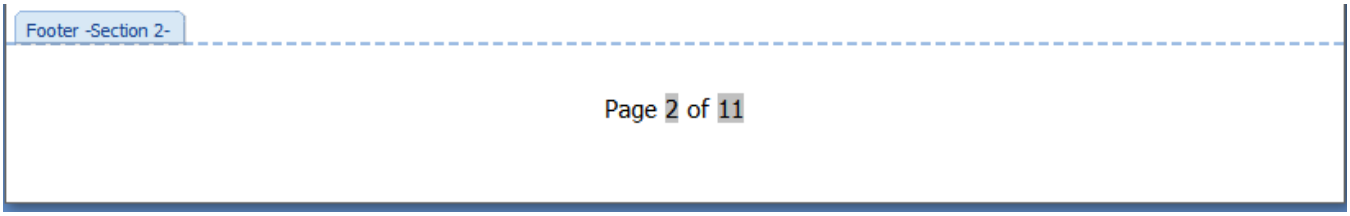
M. First, by being labeled "Same as Previous," the section 2 footer is telling you that it is still linked to the footer we established in the table of contents (section 1). Therefore, if you delete or make changes to this page number, you're going to simultaneously delete or change the page number in section 1. To avoid this, first follow the **Always Click Into The Header/Footer You Want to Modify Rule**. Now cut the link by clicking the Header & Footer Tools ribbon ➔ click the Link To Previous button (to turn it off). The "Same as Previous" label should disappear.

N. Second, we need to tell Word that we're starting page numbering over again in Section 2. In order to do that, click the Header & Footer Tools ribbon ➔ Page Number button ➔ Format Page Numbers ➔ click Start at, then OK.



O. After you click **OK** in the previous step, you need to revisit the **Always Read The Labels Rule**. It looks as if your page number disappeared, but actually, Word jumped you back up to the footer at the bottom of page 3 and you were previously in the footer at the bottom of page 4. Don't be alarmed, just scroll back down to the bottom of page 4 and you should see that the page number has changed from 4 to 2.

P. Place your cursor in front of the page number and type the word "Page" plus a space. Now click after the page number and add " of. " Now we're ready to insert the code for the total number of pages. However, we don't want the total number of pages in the document because that would include the table of contents. Instead, we want the total number of pages in *Section 2*. To do this, click the Insert ribbon ➔ Quick Parts button ➔ Field ➔ SectionPages ➔ OK:



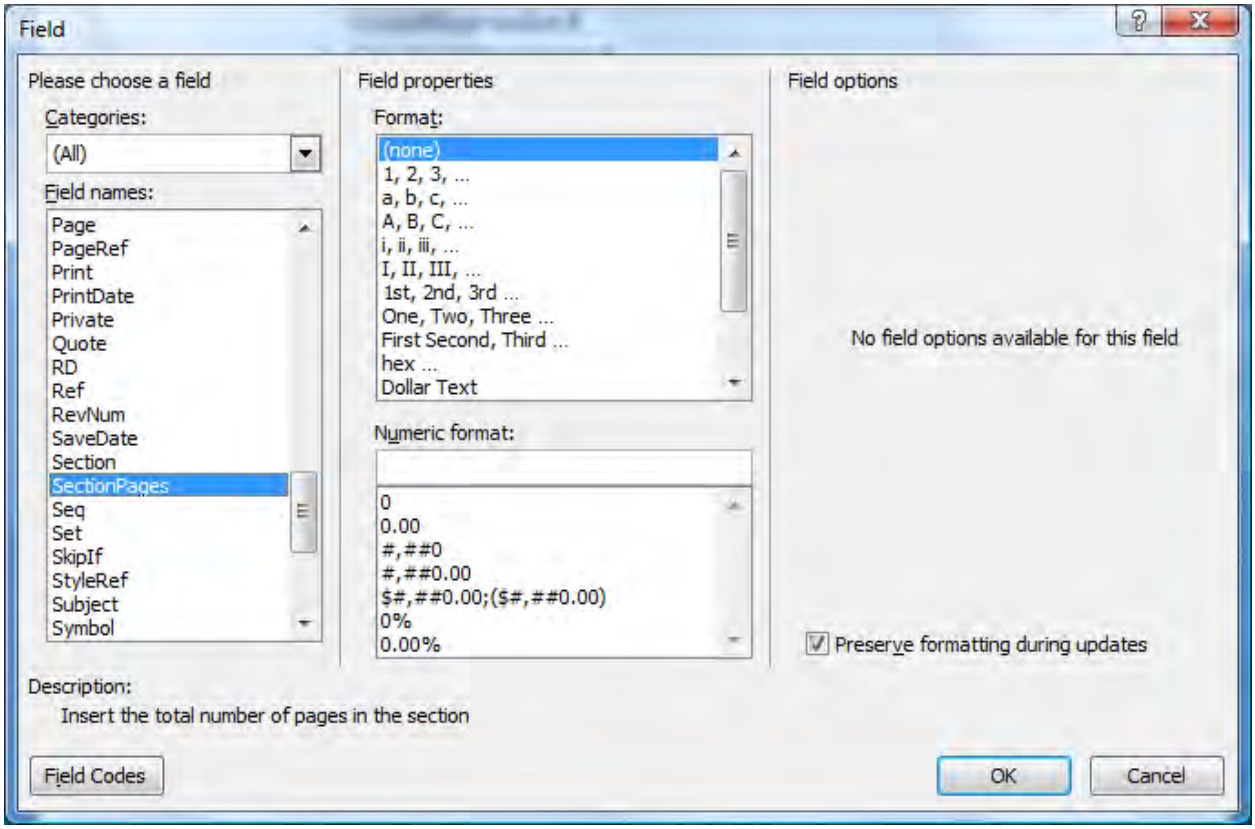
Q. Click the Close Header and Footer button on the Header & Footer Tools ribbon and you're done!!

7. Insert the Total Number of Pages in a Particular Section of the Document: If you are in a multiple section document, and you want the page numbers to read Page 1 of 5 when there are 10 total pages in the document, but only 5 pages in the section, you'll need this trick:

A. Position your cursor where you would like to insert the total number of pages in a particular section.

B. Click Insert ribbon ➔ Text group ➔ Quick Parts button ➔ Fields.

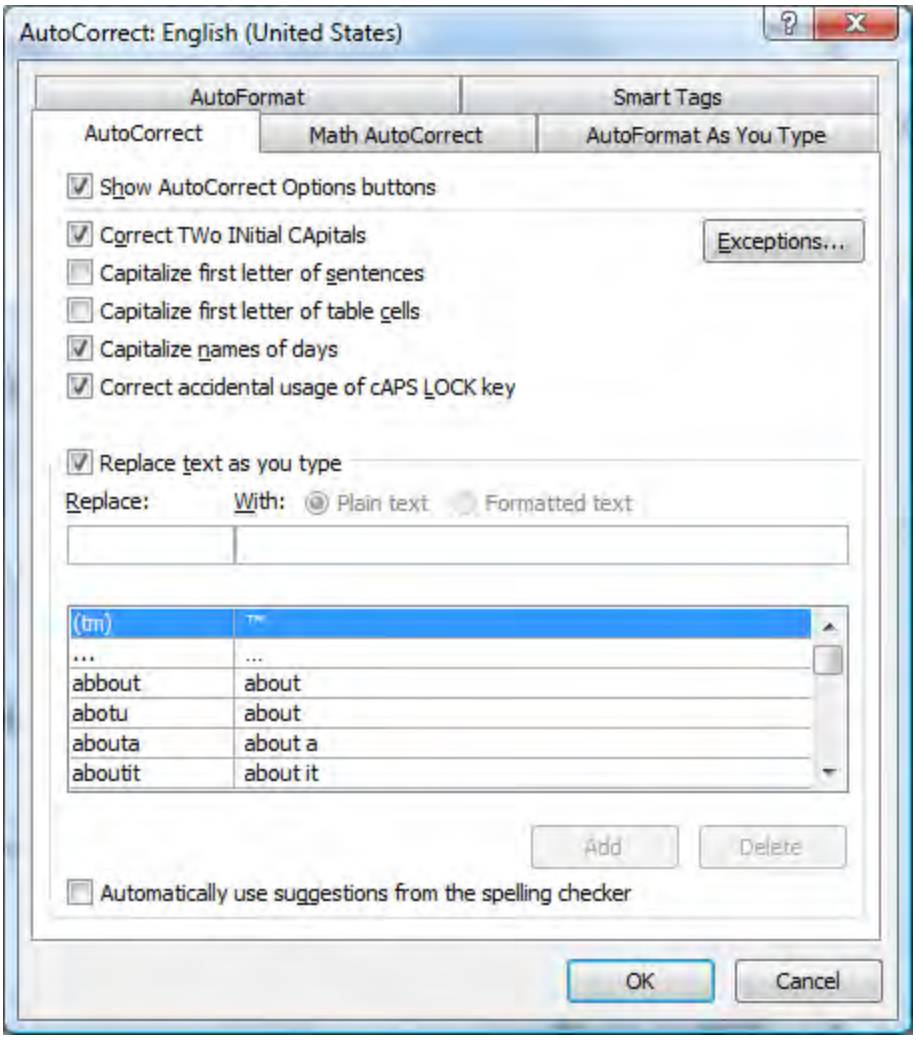
C. Under Field names, choose SectionPages, format the Field properties as you would like and click OK.



TIP 20 - USE AUTOCORRECT PROACTIVELY: Word also uses AutoCorrect to automatically correct commonly misspelled words on the fly and with no intervention on your part.

1. To Create an AutoCorrect Entry: Even though Word includes hundreds of commonly misspelled words in AutoCorrect, you might want to add a few of your own. To do this, follow these steps:

A. Click the Office button (Word 2007) or the File menu (Word 2010/13/16) ➔ Options ➔ Proofing ➔ AutoCorrect Options button. The following dialog will appear.

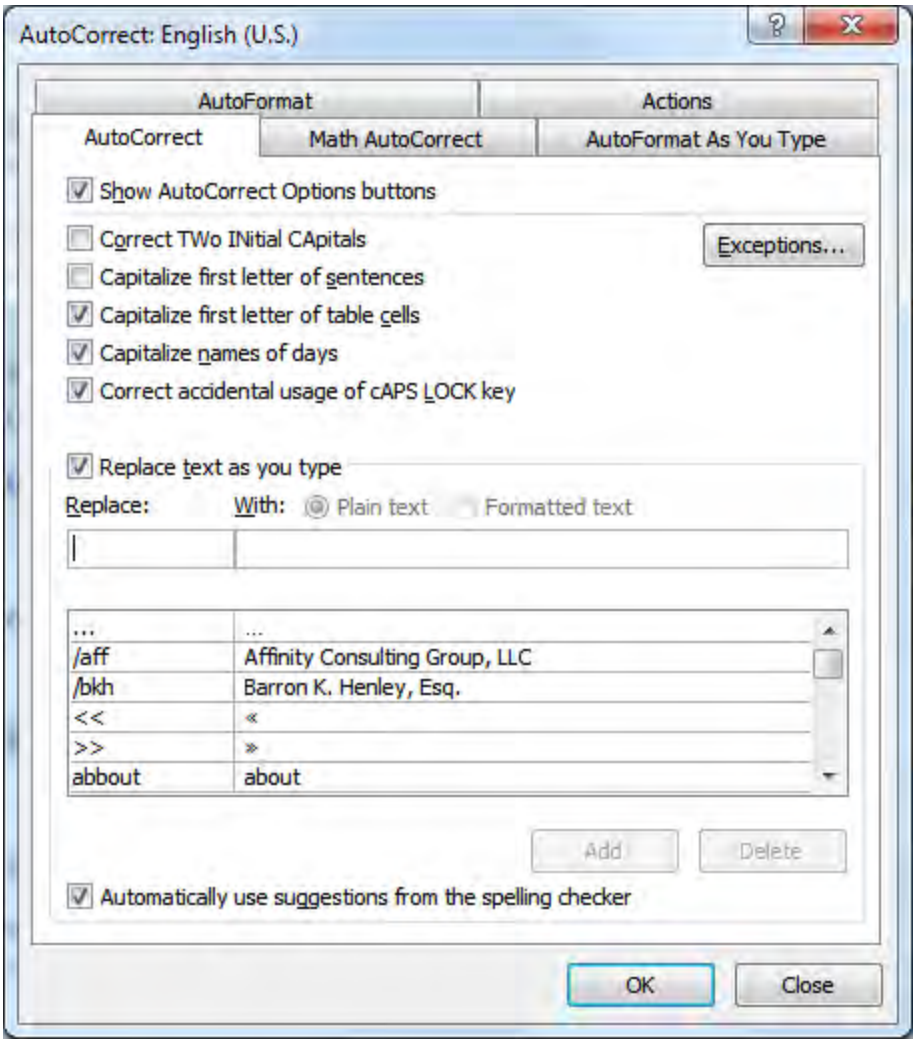


B. In the Replace box, type the word as you commonly misspell it. In the With box, type the correct spelling of the word.

C. Click Add and then hit OK**.**

D. Test it by typing the word as you commonly misspell it *followed by a space*. The keystrokes should be replaced by the AutoCorrect text.

2. Legal Tip - Use AutoCorrect Proactively: Passively, AutoCorrect is very useful, but we recommend using it proactively. In other words, try creating AutoCorrect entries which automatically insert words or phrases which you frequently type and/or which are annoying to type. However, remember to use non-word acronyms for the "replace" word. An easy way to handle this is to add / in front of your "replace" words. For example, I created an AutoCorrect entry which replaces "/aff" with "Affinity Consulting Group, LLC".



TIP 21 - NEVER TYPE A PARAGRAPH NUMBER: If you have numbered, lettered or bulleted paragraphs, you should never type or otherwise manually enter the numbers/letters/bullets. The ability to do this automatically is one of the primary benefits of having a word processor in the first place. There are many ways to do this, but I'm only going to show you the best way to handle this below.

1. **How Multilevel Paragraph Numbering Works**: Word allows you to set up automatic paragraph numbering schemes up to 9 levels deep. For example, below is a 4 level deep outline:

IX. **TERMINATION**.

A. **Termination Without Cause**. This agreement may be terminated by either party without cause upon ninety (90) days written notice to the other party, it being understood and agreed that such term and notice are reasonable in relation to the scope of this agreement and the undertakings herein provided for.

B. **Termination With Cause**.

1. **Default**. If either party shall default in the performance of any obligation or payment of any indebtedness under this agreement, it shall have 30 days after delivery to it of written notice of such default within which to cure such default. If such defaulting party fails to cure its default within such period of time, then the other party shall have the right to terminate this agreement without further notice.

2. **Other**. This agreement may be terminated by either party at its option and without prejudice to any other remedy to which it may be entitled at law or in equity, or elsewhere under this agreement, by giving ten (10) days written notice of termination to the other party if the latter should.

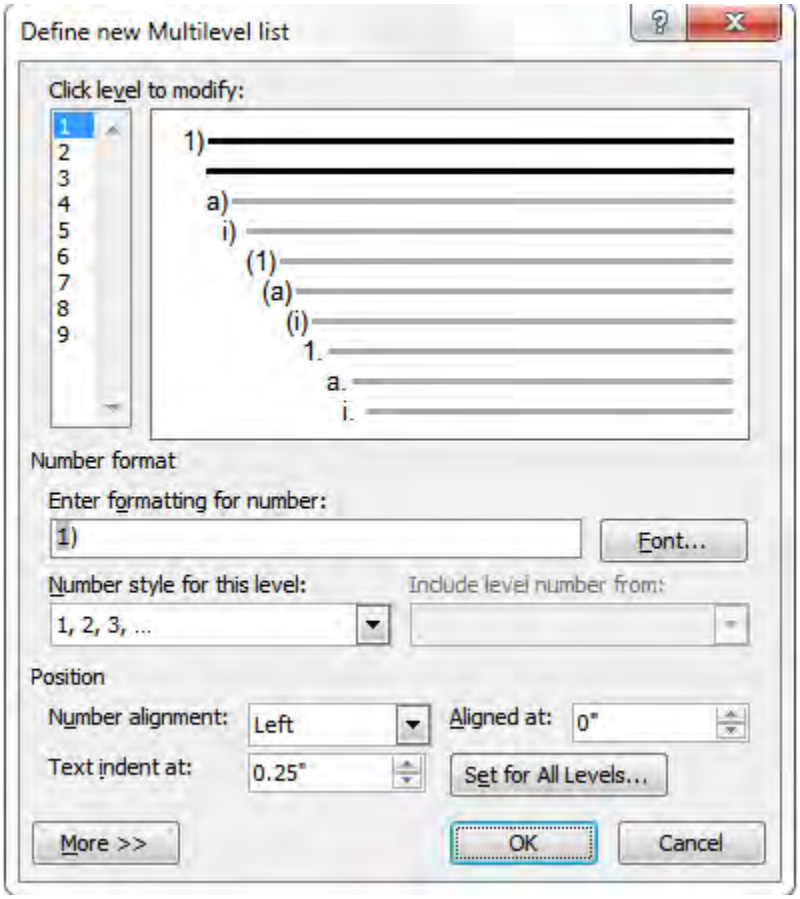
i. Be adjudicated a voluntary or involuntarily bankrupt under any chapter of the Bankruptcy Act, as now or hereafter amended;
ii. Institute or suffer to be instituted any proceeding for a dissolution, reorganization or rearrangement of its affairs;
iii. Make an assignment for the benefit of creditors;
iv. Become insolvent or have a receiver of its assets or property appointed; or
v. Allow any money judgment against him to remain unsatisfied for a period of thirty (30) days or longer.

2. Why You Should Use Multilevel Numbering In Every Circumstance: The Bullets button and the Numbering button only allow ONE level of bullets or paragraph numbers. Therefore, if you start with either one and later determine that you need a sub-level, you simply can't get there from here (and you're going to have to start over with a multilevel numbering scheme). Because of this, you must ***always*** use the Multilevel List button exclusively for numbering or bullets of any kind. Multilevel lists can also handle any kind of bullet point and since there are 9 available levels, it's never a problem to add another level (unless you need 10 or more levels).

3. Set Up a Multilevel Paragraph Numbering Scheme: If you already have paragraphs typed and want to apply paragraph numbering after-the-fact, you can do so by selecting the paragraphs and following the steps below. Otherwise, set up the scheme before you start typing.

A. Click the Home ribbon ➔ Paragraph group ➔ Multilevel List button arrow button).

B. Choose Define New Multilevel List (*not* Define New List Style) at the bottom of the drop down menu.



C. You will now see the dialog shown above. Here are a couple of things to keep in mind:

i. You can make adjustments to any of the nine levels by simply clicking on the level you want to modify on the top, left side of the dialog.

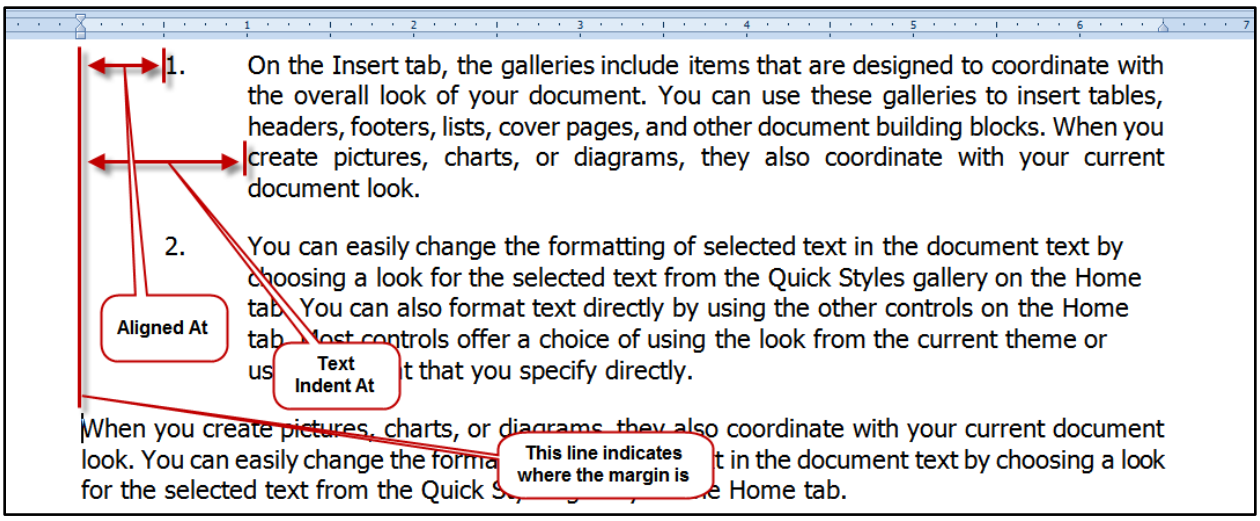
ii. You NEVER type a number in the Enter formatting for number box. Instead, you use the *code* for the paragraph number which will be inserted when you choose something from the Number style for this level drop down.

iii. Font button should only be clicked if you want the formatting for the paragraph number to be different from the paragraph that follows it. Therefore, you should not click the Font button in most cases.

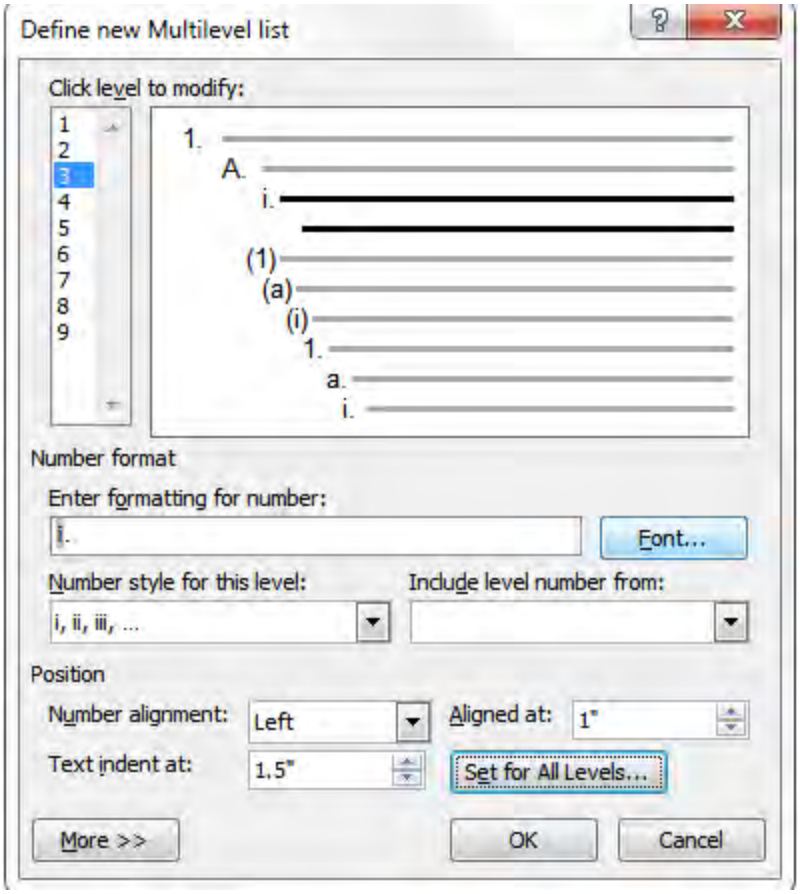
iv. Number alignment must always be set to Left, even if you're centering an article number.

v. Aligned at means how far away from the left margin you want your number to appear.

vi. Text indent at means how far from the left margin you want the text following the number to appear.



vii. Below I have configured the dialog for a 3 level deep outline. Since I'm not going to use levels 4 - 9, there's no need to format them at this point.



viii. After you've set up the levels the way you want, click OK and you'll see a paragraph number appear in your document. Just begin typing. When you hit Enter for the next paragraph, you'll get the next subsequent number automatically.

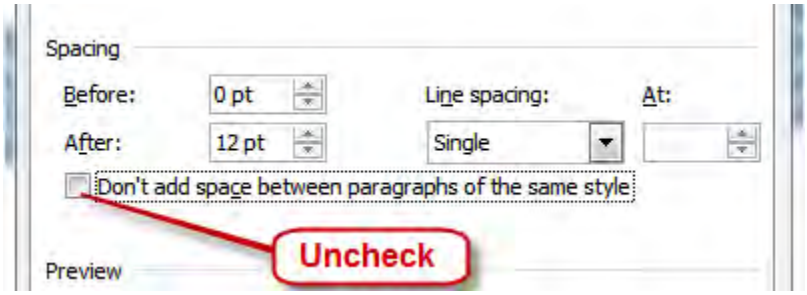
4. **Change Outline Level of a Paragraph**: If you want to change the level of the next paragraph to a sublevel (level 2 rather than level 1), you can use any of the following methods:

   A. You can promote or demote a paragraph by clicking the Home ribbon ➔ Paragraph group ➔ Decrease/Increase Indent buttons .

   B. If your cursor is at the beginning of a paragraph you can demote it by hitting the Tab key on your keyboard. Promote by hitting Shift + Tab.

   C. If you right-click the paragraph, you can promote it by choosing Increase Indent or demote it by choosing Decrease Indent.

5. **Add Spacing Between Numbered Paragraphs**: If you want to add spacing between the numbered paragraphs, select all of the paragraphs you've typed ➔ right-click the selected text ➔ Paragraph. Add a 12 pt Space After and uncheck Don't add space between paragraphs of the same style. Then click OK.



6. **Make All Paragraphs Double Spaced**: The explanation for adding spacing between numbered paragraphs above assumes you have single spaced paragraphs and would like extra space between each one. If you just want every paragraph double-spaced, don't add space between them or you'll end up with too much space between each paragraph when you apply the double space formatting. Instead, select all of the paragraphs you've typed, and click Home ribbon ➔ Paragraph launcher ➔ set Line Spacing to double (SK: Ctrl + 2). Of course, you can also apply double spacing by using the Home ribbon ➔ Paragraph group ➔ Line and Paragraph spacing button ; or right-click the selected paragraphs, choosing Paragraph, then switching Line Spacing from single to double.

7. **Restart Numbering at 1**: Right click the paragraph you want to start over again at 1 and choose Restart at 1.

8. **Make Any Changes To Your Numbering Scheme**: If you decide you want to change something about the numbering scheme you've created, right-click any paragraph and choose Adjust List Indents. You'll be presented with the Multilevel list dialog again and you can make changes. Note that you *do not* have to be in the first paragraph to do this. For example, let's say I have 3 pages of numbered paragraphs when I decide that I want to change the top level of the outline from Arabic (1.) to Roman Numerals (I.). Right click any paragraph in the numbered list, choose

Adjust List Indents, click on Level 1, and change Number style for this level from 1, 2, 3, … to I, II, III, ... and click OK. As you'll see the entire list will change (above and below the paragraph that you right-clicked in the first place).

9. **Turn Numbering Off**: There are two ways to do this:

A. Hit the Backspace key twice; or

B. Click the Numbering button once

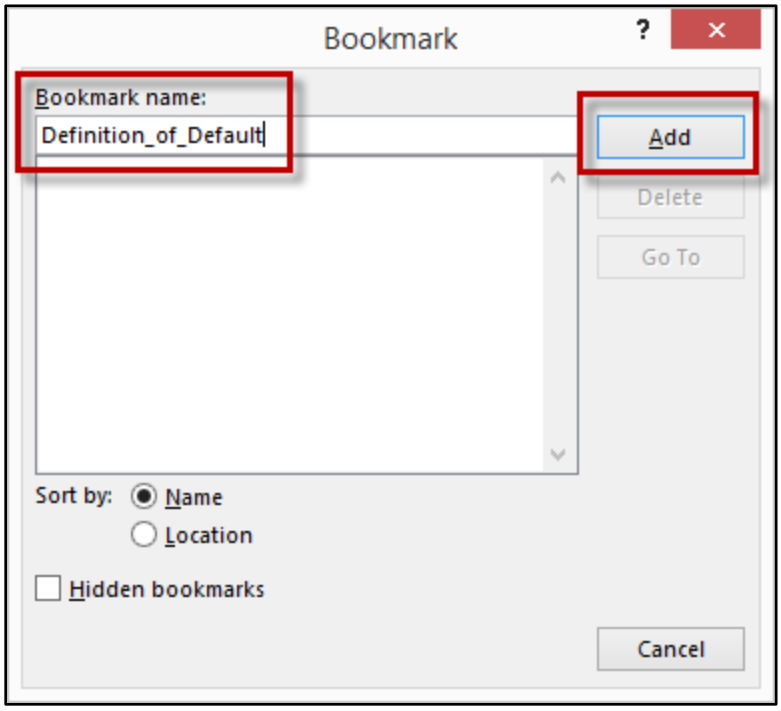
TIP 22 - NEVER TYPE A PARAGRAPH NUMBER CROSS REFERENCE: If you use automatic paragraph numbering (which you should ALWAYS use - see previous rule), then you can create paragraph cross references which can be automatically updated and therefore always correct.

1. **Inserting Cross References**: Once you have incorporated automatic paragraph numbering into your document, you are ready to insert cross references. Cross references are used in legal documents quite frequently. Word provides a simple and convenient way to use cross references, automatically updating them if a paragraph is moved. For instance, in a contract, you may have a reference that looks something like "see paragraph II.B.3" at the end of a paragraph. Anyone can type "see paragraph II.B.3" without creating a cross reference, but what happens if paragraph II.B.3 is moved – and it now becomes paragraph II.B.4? Word can solve this problem with 100% accuracy.

There are multiple ways to utilize cross references but I'm only going to show you the best, most fool-proof way to do it here. Just follow these steps:

A. Go to the paragraph you want to reference elsewhere and put your cursor in the paragraph. Click Insert ribbon → click the Bookmark button → enter a bookmark name

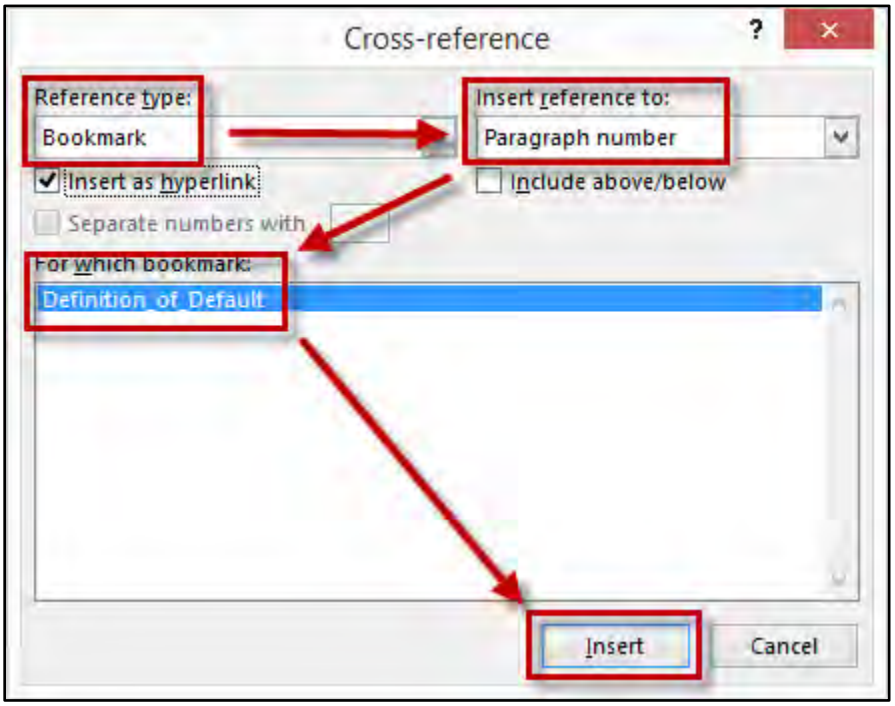
(no spaces allowed in the name) ➔ Add button. This adds a placeholder which you'll reference later.



B. Go to the location where you would like to insert the cross reference to the paragraph marked in step 1 above. Place the cursor exactly where the cross reference will be inserted.

C. Select Insert ribbon ➔ Links group ➔ Cross reference button.

D. Under Reference type, select **Bookmark** (this is not the default). Under Insert reference to, select **Paragraph number** (this is also not the default). Click on the bookmark you want to reference, then click the Insert button, then click the Close button (the Cancel button becomes a Close button after you click Insert).



2. **Update Cross References**: After a cross reference is inserted, you may edit the document by adding or deleting paragraphs which will change the paragraph number being referenced. Cross references (tables of contents, tables of authority, indices and most other fields) do not automatically update so you have to update them. To ensure that all fields are correct in the document simply hit Ctrl + A to select the whole document ➔ Hit F9 to update.

TIP 23 - IF YOU DON'T LEARN TO CONTROL STYLES, YOU'LL NEVER CONQUER WORD: A full styles class takes 3 hours by itself so it's beyond the scope of this class. However, I want to make sure you understand what this feature is in Word and why it's important. If you read this entire chapter, you'll also know quite a bit more about them and you can experiment on your own.

1. **What Are Styles?** A style is a set of formatting characteristics that you can apply to text, tables, and lists in your document to quickly change their appearance. When you apply a style, you apply a whole group of formats at once. You can view styles by clicking the Home ribbon ➔ Styles launcher to reveal the Styles task pane (see Figure 0-1 below).

Figure 0-1

A subset of all of the styles available are also visible in the Styles gallery on the Home ribbon.

A useful way to think of styles is like a car radio pre-set button. Every time you push the button, you're back on the exact station you programmed the button for.

2. Two Formatting Approaches in Word:

A. **Direct Formatting**: If you want a heading to be bold, underlined, Arial 14 point and centered, one way of achieving that by selecting the text and manually applying those formatting attributes by using buttons and/or shortcut keys (like Ctrl+B for bold). Selecting text and manually applying formatting is known as Direct Formatting. It is time-consuming, usually annoying, and it's difficult to ensure consistency throughout your document.

B. **Formatting With Styles**: An alternative way of formatting the heading to be bold, underlined, Arial 14 point and centered is to use a Style to do it. I could easily modify the style called Heading 1 to match these formatting attributes. When I apply Heading 1 to the text, it will automatically convert it from whatever it was before to my new style definition. Using styles is faster and ensures consistency throughout your document.

3. Advantages of Styles:

A. **Speed**: You can assign very complex combinations of character and paragraph formatting to a particular style and then apply that style with a single keystroke. As such, styles are much faster to use than manual formatting.

B. **Easy Updating**: Assume you've used styles throughout your document and then decide you don't like the way something is formatted. Instead of manually reformatting every paragraph, all you have to do is change the style *definition*. Once changed, all the text to which the style had been applied, throughout the document, immediately updates without any manual formatting on your part.

C. **Enforce Formatting Consistency and Make Editing Easier**: Once styles are setup, users don't have to remember complex formatting techniques; they can simply select a style from the drop-down list. This pre-fab formatting also ensures that all of the documents created with the same styles will look the same.

D. **Tables of Contents**: If you use styles for the headings and numbered paragraphs in a document, you do not need to mark text for inclusion in a table of contents because Word can generate tables of contents directly from the styles used in the document. Anyone who has had to mark entries for a table of contents in a long document will appreciate this.

E. **Navigation**: If you've used Heading styles (explained below) to control formatting in your document, in Word 2007 you can use the Document Map (View ribbon → Show group → check the Document Map checkbox) and in Word 2010/13/16 you can use the Navigation Pane (View ribbon → Show group → check the Navigation Pane checkbox) to quickly navigate your document.

4. **Where Styles Are Stored**: Styles are stored inside templates and documents. Templates are very much like containers which can contain text as well as styles, macros, toolbars and the like.

5. **Types of Styles**:

A. **Paragraph**: Paragraph styles apply formatting to the entire paragraph and can also be used to apply font formatting in addition to paragraph formatting.

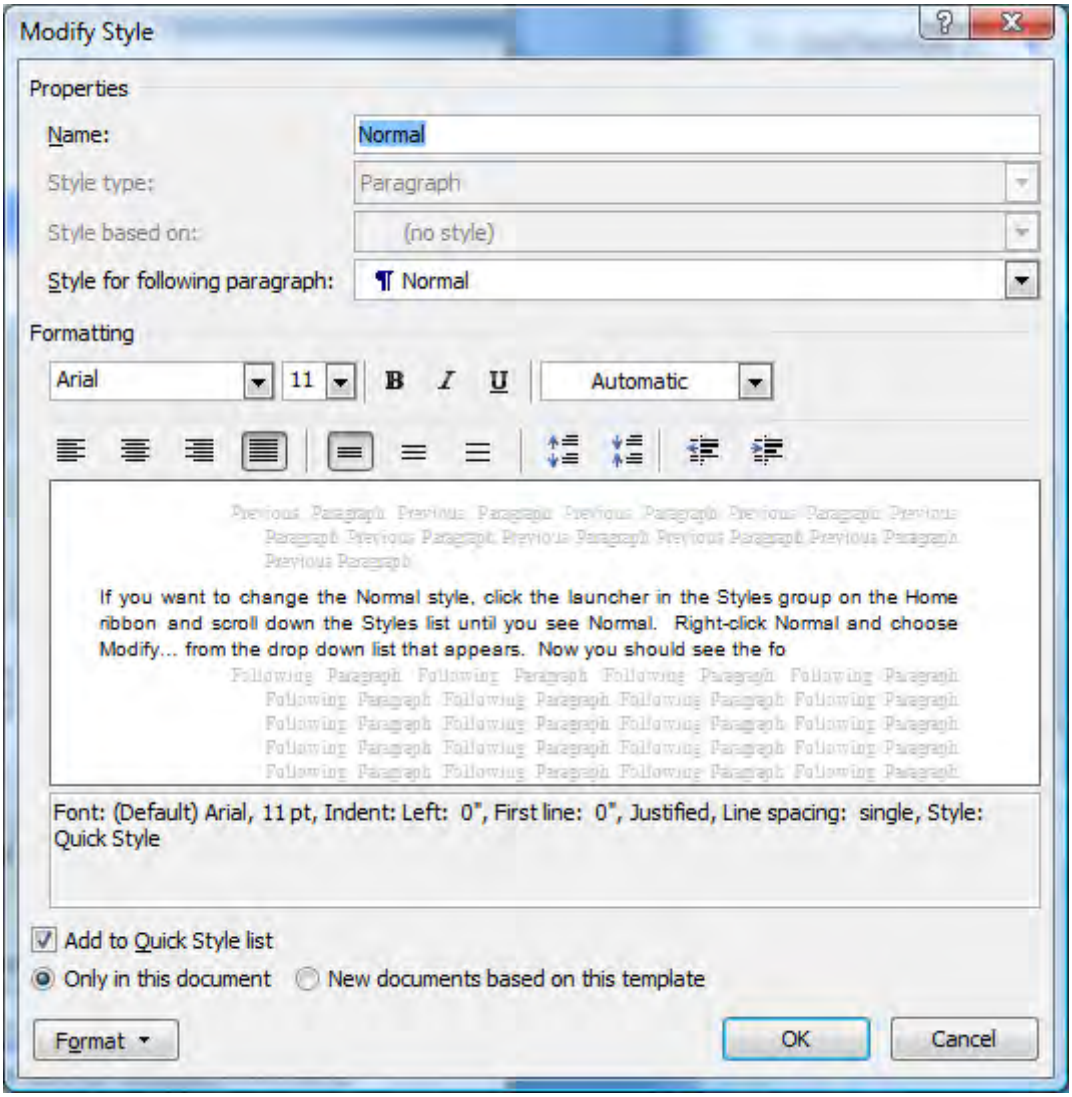
B. **Character**: Character styles apply formatting to individual characters only.

C. **Table**: Applies border, shading, alignment and character formats to tables.

D. **List**: Applies outline number and bullet formats to lists.

6. **Normal Style - The Default Style**: The default style applied by Word is called Normal. When you create a new document, this style is applied. If you are unhappy with the way your documents are formatted by default, you can edit the Normal style and permanently change its formatting attributes (if you check Add to template after you make a change).

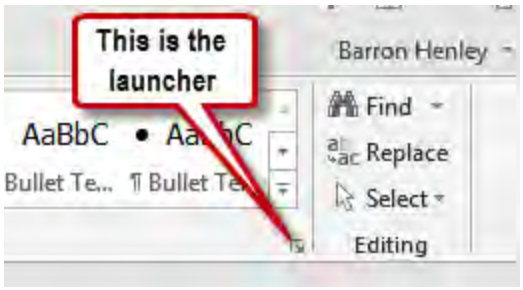
7. **Change Normal**: If you want to change the Normal style, click the Home ribbon → Styles launcher to open the Styles Pane. Scroll down the Styles pane until you see Normal. Right-click Normal and choose Modify… from the drop down list that appears. You should see the following dialog.



You can make changes to the document's Normal style by clicking the formatting buttons or clicking Format and choosing a format category to modify. If you want to make the changes affect all future documents, click the New documents based on this template box at the bottom of the dialog before you click OK. This adds your modifications to the default template (normal.dot) and therefore affects all future documents you create. If you only want your changes to affect *this document*, then leave the box blank (click Only in this document if the New documents based on this template radio button is already selected).

8. Using Existing Styles:

A. **Styles and Formatting Task Pane**: Open the Styles task pane by clicking the Home ribbon ➔ Styles launcher (SK Ctrl+Alt+Shift+S).



To see all of the styles that are available, click on Options… and choose All styles under Select styles to show at the next dialog.

B. **Apply Existing Style**: To apply an existing style to text in your document, simply click into the paragraph and single-click the style name you would like to apply from the Styles task pane. If you've assigned shortcut keys to your styles, they can also be applied by hitting the appropriate key combination.

9. Create and Apply New Styles:

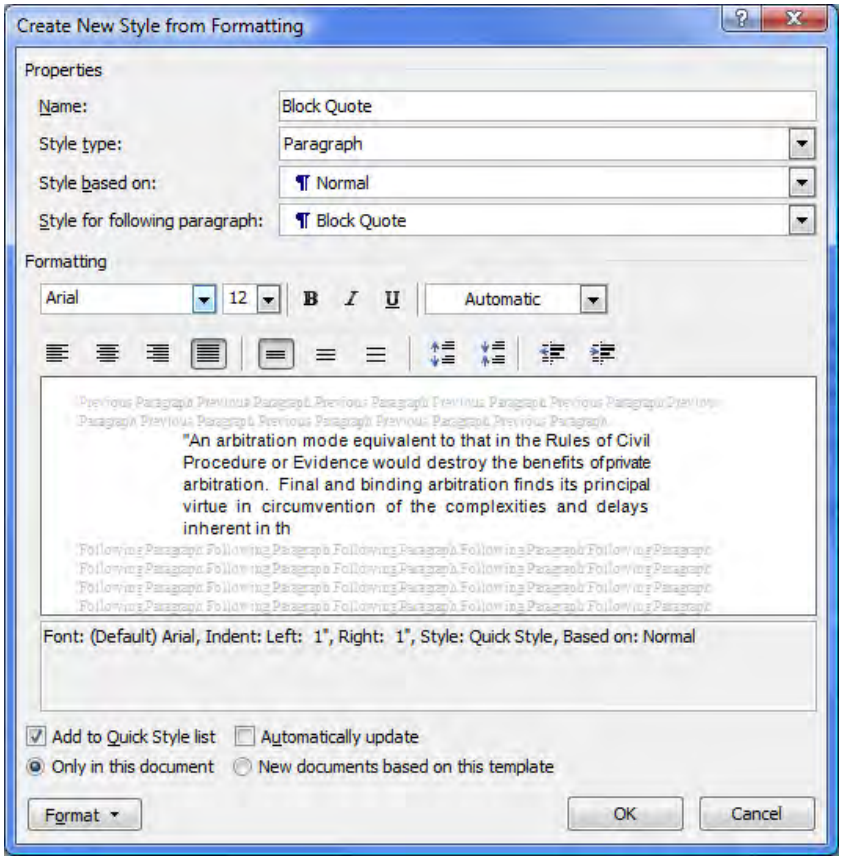
A. **Style to Work Only within the Current Document**:

i. Type and format text in block quote format.

"An arbitration mode equivalent to that in the Rules of Civil Procedure or Evidence would destroy the benefits of private arbitration. Final and binding arbitration finds its principal virtue in circumvention of the complexities and delays inherent in the court procedures. An intention to destroy that virtue will not be inferred from a statement which is only hortatory adoption of fair process for an arbitration hearing." *Lochart v. American Reserve Ins. Co.* (1982), 2 Ohio App.3d 99.

ii. Select the entire paragraph or simply click your cursor somewhere in the paragraph.

iii. Open the Styles task pane (Home ribbon ➔ Styles launcher) and click the New Style button.



iv. Call the style "Block Quote." As you can see, the new style definition automatically configured itself consistently with the formatting of the paragraph you selected before clicking New Style….

v. Click OK.

vi. To apply the style in a document, place the cursor in the paragraph and click on the style in the Styles Pane.

B. **Style to Work within All New Documents**: Follow all of the steps above except that in step 6, *check* the box adjacent to New documents based on this template. Doing this will add the style your normal.dot template, thereby making it available in all future documents created from normal.dot template.

10. Modify an Existing Style: To quickly modify an existing style, follow these steps:

A. Find one instance of the style and change the formatting of the text.

B. Select the newly formatted text.

C. Open the Styles task pane (Home ribbon ➔ Styles launcher). The style you've modified should be highlighted.

D. Right click the name of the style in the task pane and choose Update to Match Selection.

11. Using Styles: You are using Styles every time you use Word. If you don't overtly choose a particular style, then a default style called Normal is applied to the text you type. Let's assume you're typing a letter which will contain three paragraphs. Each of the paragraphs must be single spaced, with a double space between each paragraph, full justified, Times New Roman 12 point, first line half-inch indent. You have 2 choices to achieve that formatting.

A. **Formatting Without Styles**: The first option is to do it manually. You could type the paragraphs, put a tab in front of each paragraph and two hard returns after each one. You could make them justified by choosing that setting from the Home ribbon ➔ Paragraph group (SK: Ctrl + J). If the font isn't already Times New Roman 12 point, then you could select the paragraphs and choose those options from the Home ribbon ➔ Font group.

B. **Formatting With Styles**: The second option is to create a style (other than Normal) to handle that formatting or simply modify one of the Styles that Word includes automatically in every document you create. Let's say you want to create a new style. You would open your Styles pane (Home ribbon ➔ Styles launcher), and click the New Style button. Name the style "Letter Paragraph." Click Format ➔ Font, then make the font Times New Roman 12 pt. Click Format ➔ Paragraph, and set a first line, half inch indent, set the justification to full, set the space after to 12 pt. Now your style will handle all of the formatting for you. To modify an existing style, follow the steps in "Modifying an Existing Style" on page 178 . Simply select the paragraphs and single click the Letter Paragraph style in the Styles task pane.

C. **Which Method You Should Choose**: If you're creating a simple document and *not* using paragraph numbering or bullets, then I don't think it matters whether you use styles or not. Some Word instructors insist that you always use a customized style no matter what and that's it's never okay to use "direct formatting" or leaving everything in the normal style and formatting the text manually. I simply disagree. While I do advocate using as much autoformatting as possible, if I'm typing a simple letter, it often isn't necessary to create custom styles to handle every type of formatting that may exist in that letter. By "autoformatting," I mean that instead of putting a tab in front of each paragraph, I'd use a first-line, half-inch indent (Home ribbon ➔ Paragraph launcher ➔ Indents and Spacing tab). Instead of hitting two hard returns at the end of each paragraph, I'd use automatic paragraph spacing (12 point after).

D. **When You Must Use Styles**: Generally speaking, you can set up bullets and paragraph numbering without using Styles. However, you're likely to have problems with them unless you use Styles to control the numbering and bullets. Common issues which arise if you don't use Styles include a) random re-starting of the numbering, b) bizarre indents that seem to set themselves, c) problems with sublevels in the paragraph numbering scheme, and d) paragraph letters (A, B, C, etc.) switching to numbers or numbers to letters inexplicably. In addition, if you use Bullets and Numbering in isolation, then the only

formatting you control with the formatting attached to the numbering itself. You have no automatic control over the balance of the text that follows the paragraph number or bullet. So the general rule is that if you're generating complex documents without using Styles, a) you're doing it wrong, and b) you're spending two to ten times the amount of time necessary to handle the formatting. In fact, the appropriate use of styles when drafting complex documents can eliminate formatting issues you might otherwise encounter except issues involving Section formatting (like page numbering)

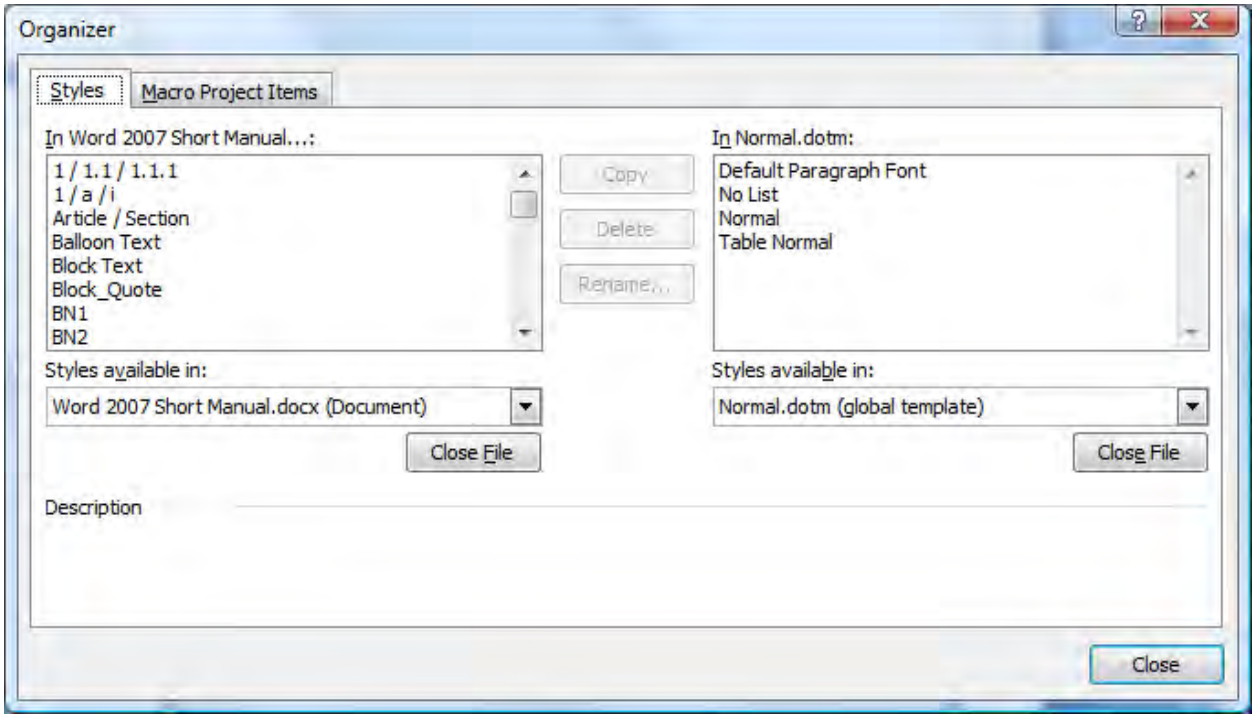
12. Copy Existing Styles Into Documents You're Working On: When you go through the trouble of creating new styles or modifying existing styles in your default template (normal.dot), you'll be able to see and utilize those styles in future documents you create (they're automatically deposited into all new documents). However, if you open a document that you created previously or one you received from someone else, your wonderful new styles don't automatically show up in those documents. In those cases, you'll want to copy your custom styles into the document you're working on so you can easily format the text contained therein.

A. **Copy Styles From Your Default Template**: One fast way to change the formatting is to copy styles from your Normal.dot template into the document you're working on and apply them (if necessary). For example, let's say I've opened a document and the default formatting is Courier New, 12 point, single spaced, left justified and I want it to be Times New Roman, 12 point, single spaced paragraphs, but double spaces between paragraphs and full justified. Furthermore, let's assume that the text of the document is governed by the normal (default) style and that the normal style in my new documents reflects my preferences. My choices for reformatting the document would be to modify the normal style already embedded in the document OR simply copy my normal style into the document and over-write the existing one. You already know how to handle the former so this is how you would accomplish the latter:

i. On the Styles task pane (Home ribbon ➔ Styles launcher), click the Manage Styles button.

ii. Now click the Import/Export button in the lower, left-hand corner of the dialog.

iii. You'll see the dialog below.



iv. As you can see, the styles stored in your default template (normal.dot) appear on the right and the styles embedded in the document that is currently open are listed on the left. Therefore, simply locate "Normal" on the right side (in normal.dot) and click once on it. The Copy button will un-gray in the middle.

v. Click the Copy button. It will ask you if you would like to overwrite; say Yes, then click Close.

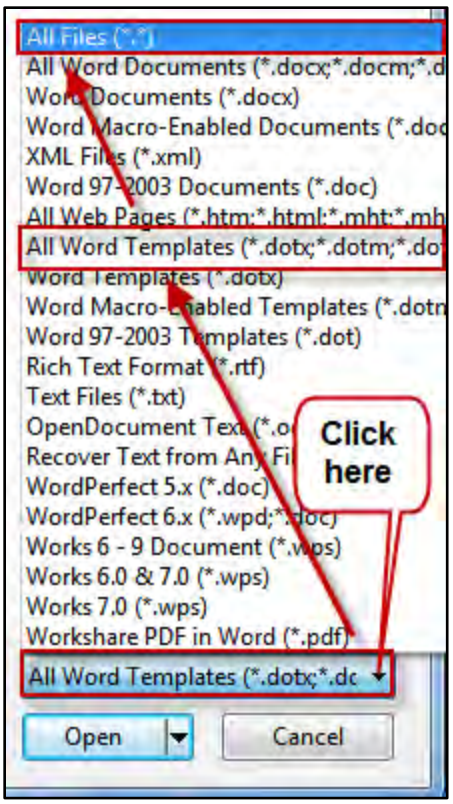
B. **Copy Styles From Any Other Document/Template Into a Document You're Editing**: Let's say you're working on a document which has no developed styles in it and you remember that another document you worked on previously has the perfect set of styles to use in this one. You can pull those styles into your current document by following these steps:

i. On the Styles pane (Home ribbon → Styles launcher), click the Manage Styles button.

ii. Now click the Import/Export button in the lower, left-hand corner of the dialog. On the next dialog, you'll see the styles in the document you're editing listed on the LEFT and the styles in your default template on the RIGHT.

iii. On the <u>right</u> side of the dialog, click the Close File button. It will immediately switch to an Open File button.

iv. Click the Open File button and browse to the file you want to pull files from. <u>NOTE</u> at the bottom of the browse dialog that Word is looking for templates only. Make sure you switch that to All Files.



v. Once you've selected the document or template where the styles exist you want to import, the styles in that document will appear on the right side of the import/export dialog. Select the styles you want to import and click the <- Copy button. Now it will ask you if you want to over-write the existing styles. Click Yes to All, then the Close button. Now when you open your styles pane, you'll see the styles from the other document and you can use them in the document you're editing.

13. **Advanced Styles**: Note that this is difficult and somewhat confusing. However, if you get things setup correctly, it's virtually impossible to screw up your paragraph numbering or anything else related to formatting in your document. Follow these steps closely and eliminate future annoyances and frustrations.

A. **The Key to Success**: The key here is to use styles to control the paragraph numbering and the formatting of the text that follows the numbering. There are good reasons for using Word's built-in Heading styles (named Heading 1, Heading 2, etc.) so that's what we're going to do here.

B. **Tips and Things to Remember before We Get Started**:

i. Notwithstanding anything stated previously in this manual, DO NOT USE the Numbering or Bullet toolbar buttons. They'll only cause you problems.

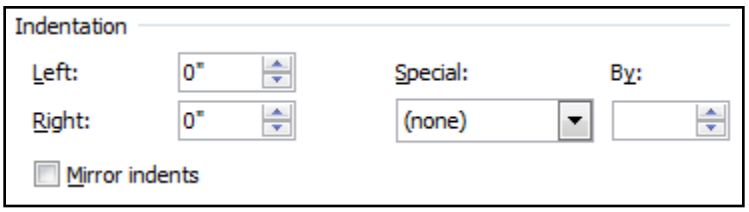
ii. Styles must be applied to your outline styles, and we strongly recommend using Word's built-in Heading styles (Heading 1, Heading 2, etc.). Simply modify the built-in Heading styles to create the font, paragraph and other formatting you want.

iii. Using "Heading" styles doesn't mean that these styles should only apply to the headings. For example, if my paragraphs look like the one below, in almost every case, I would apply Heading 2 to the entire paragraph 1.1. (not just the word Formation). However, if I wanted to automatically pull out a table of contents and only include "1.1. Formation" in it (and not the rest of the paragraph), then I would only apply Heading 2 to the word Formation.

ARTICLE 1
ORGANIZATION

1.1. **Formation**. The Company was organized as an Ohio Limited Liability Company pursuant to the Ohio Limited Liability Company Act (the "Act") by the filing of Articles of Organization (the "Articles") with the Ohio Secretary of State on February 19, 2000.

C. **STEP 1 - Modify the Heading Styles or Create Your Own**: Open the document you want to apply paragraph numbering to. You have two initial choices. You can either modify Word's existing styles to suit your purpose (the Heading styles, for example), or you can create your own custom styles. In either case, the only settings you want to alter are the font settings and the paragraph settings for those styles. However, you do not want to modify the paragraph indent settings because the numbering scheme you apply to your styles will take care of that. So don't modify any of the settings you see in the screen shot below:

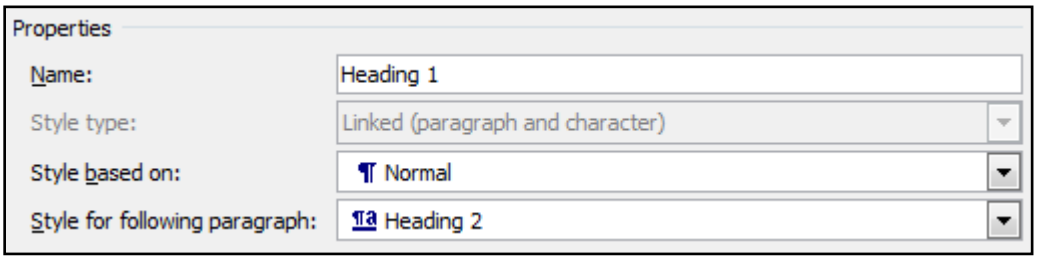


i. **Modify Heading Styles**:

a. **Setting Style Properties**: Open the Styles pane. Make sure the Heading 1 style is based on the Normal style.

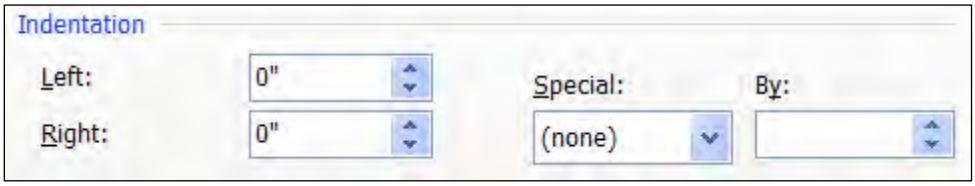
Another Properties section item to edit in each style is the Style for the following paragraph. This means that if someone is at the end of a paragraph with this style (the style you are currently modifying) and hits a hard return (Enter), what will the style of the next paragraph be? For example if I'm at the end of a paragraph numbered 1.2., then I would want

a 1.3 if I hit a hard return following that paragraph. If this level of the outline was controlled by Heading 2, then I would want Heading 2 for the Style for the following paragraph after a Heading 2.



b. **Setting Font Formatting**: Click the Format button ➔ Font… for each style and make sure the font is setup the way you would like.

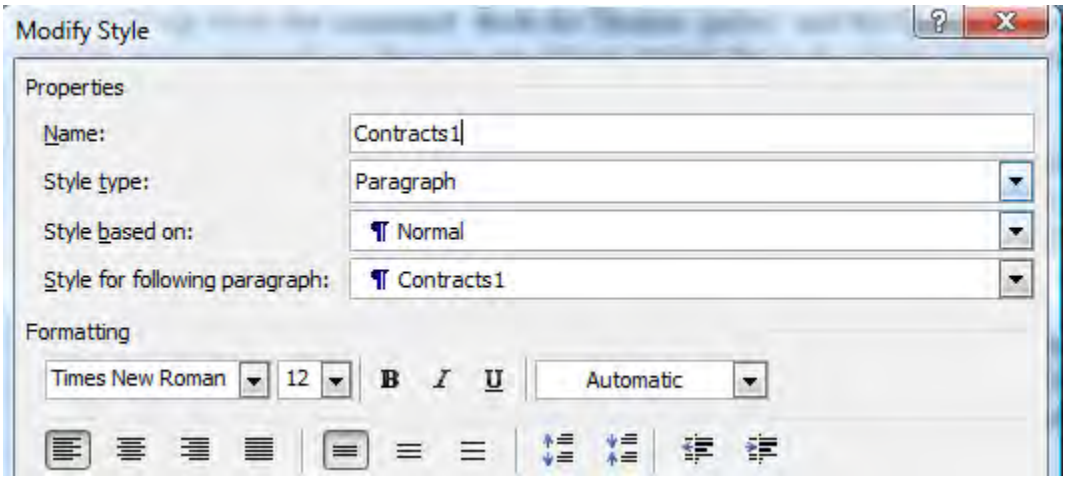
c. **Setting Paragraph Formatting**: While you're still editing each Heading, click the Format button ➔ Paragraph… ➔ Indents and Spacing tab. Set the left and right indents to 0 and the Special indent to (none). **NOTE**: Do this even if you want your headings to be indented from the left margin, and even if you want a hanging indent. This is because for outline-numbered styles, we will set the paragraph indent and the hanging indents (if any) when we set up the numbering.



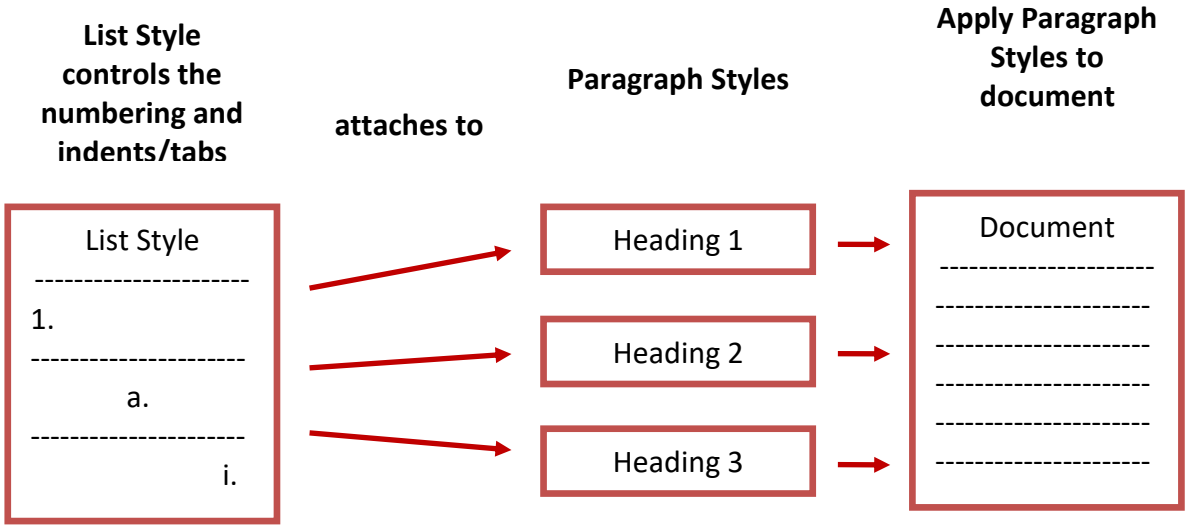
Don't forget to click the Line and Page Breaks tab in the Paragraph dialog and make sure Widow/Orphan Control is checked. If Level 1 of your outline numbering is always a stand-alone article number, you will probably also want to check Keep With Next so that those headings won't be separated from the paragraphs immediately following them by a natural page break.

Continue the foregoing steps for each Heading style you intend to use in your document.

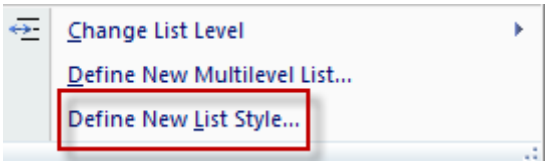
ii. **Create Your Own Styles**: Let's say I want to create a set of styles to handle paragraph formatting and numbering when I draft contracts. If you want your outline to go 4 levels deep, then I'd create 4 styles called Contracts1, Contracts2, Contracts3 and Contracts4. Each of them would be based on the Normal style.



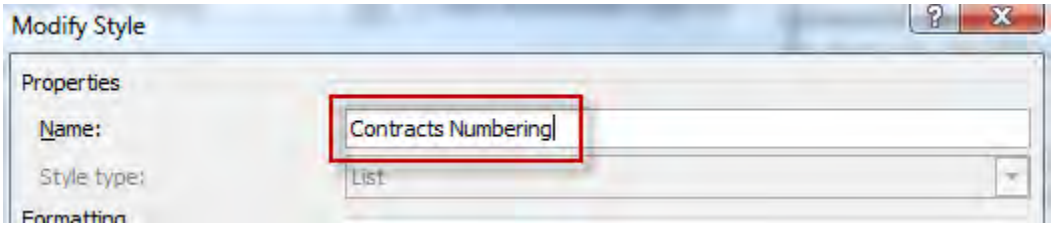
D. **STEP 2 - Create Your Outline Numbering**: Outline numbering changed in Word 2007. Previously, in Word 2003, the Format button in the Paragraph style was the way to access the Outline numbering scheme. In Word **DO NOT USE** the Format ➔ Numbering option in the paragraph style to create the outline numbering. Instead, Word requires a list style to create the Outline numbering. The list style can then be attached to the paragraph style. The process looks something like this:

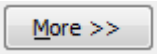


i. Create a new list style. You do this by clicking the Home ribbon ➔ Paragraph group ➔ Multilevel list button ➔ Define New List Style.

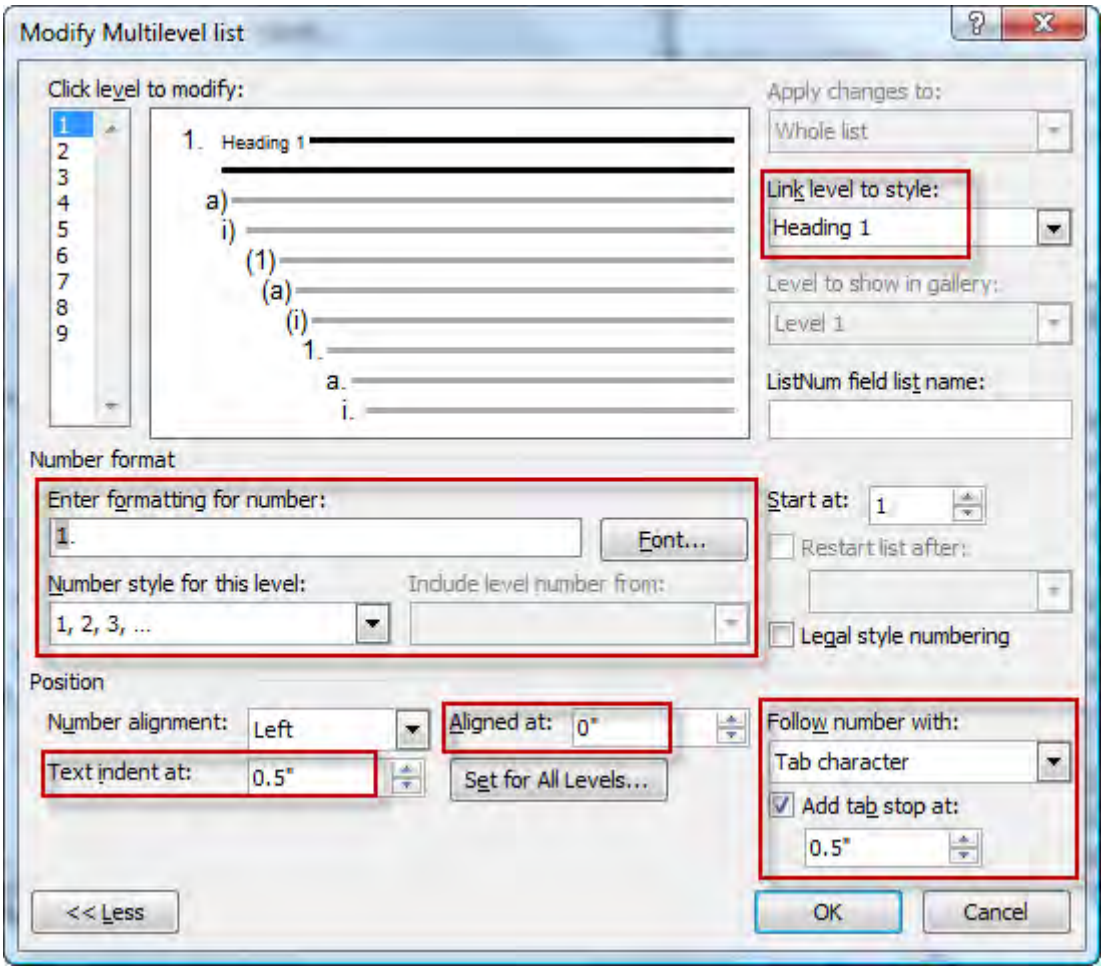


ii. Give the list a name - for example, Contracts Numbering:



iii. Now click the Format button (bottom left corner of dialog) ➔ Numbering. If you see a  button on your screen, CLICK IT!

iv. Set up the first level numbering. Choose a number format. Link level 1 to the Heading 1 style (or Contracts1 if you've set up your own styles) and set up the number, tab stop and text indent positions:



v. Next, set up levels 2 and 3 on the same screen. Select each level from the Click level to modify list.

vi. Once the numbering levels are set up and attached to the Headings, click OK**.**

E. **STEP 3 - Apply Styles to Your Paragraphs**:

i. **Point and Shoot Approach**: With the Styles pane open (Home ribbon ➔ Styles launcher), you can apply styles to your paragraphs by simply clicking into them (don't select the paragraphs unless you want to format more than one at a time), then single clicking the name of the style you want to apply to the text.

ii. **Shortcut Key Approach**: When modifying each style (Home ribbon ➔ Styles launcher ➔ right click on the style and select Modify…), you can click Format ➔ Shortcut key… and assign a speed-key to each of the styles you're using. I prefer to use Ctrl + F1 for Heading 1, Ctrl + F2 for Heading 2, etc. After they're set, you can simply click into the paragraph you want to format, then hit your speed key to apply the correct formatting.

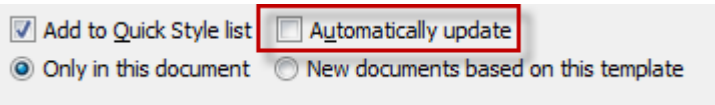
F. **STEP 4 - Subsequent Formatting Changes**:

i. **EXTREMELY IMPORTANT NOTE #1**: If you want to change your font or paragraph formatting in the future, modify the applied style, not the individual paragraph.

ii. **EXTREMELY IMPORTANT NOTE #2**: Note that you should NOT change the left indents of numbered styles by changing the Paragraph Style. Instead, change the indents in the List Style. You can modify your list style by clicking the Manage Styles button in the Styles Pane (Home ribbon ➔ Styles launcher). Find the style in the list of styles in the Edit tab and click the Modify button.

G. **Other Items To Consider**:

i. Automatically Update **Should Be Off:** Make sure that the Automatically update box, in the Modify Style dialog, is NOT checked for any of your Heading styles. This may sound like a good thing, but unless you understand what you're doing with it, it's not worth the risk.



ii. **Making Your Styles Available in the Future**: If you want all of those great styles to be automatically available in future documents you create, modify each Heading style and tick the Add to template box. That will save your style settings in your Normal.dot template. Next time you create a new file, your outline numbering settings will be available.

iii. **Creating a Template to Hold the Styles**: You can create a new template just for outline numbered documents. Setup the styles and numbering the way you would

like, delete all the text and click Office button (Word 2007) or File menu (Word 2010/13/16) ➔ Save As. At the bottom of the Save As dialog, in the Save as type box, change the setting from Word Document to Word Template. This will save the file as a document template, not a document. The next time you click Office button (Word 2007) or File menu (Word 2010/13/16) ➔ New your new template will be available, complete with your outline numbering settings.

TIP 24 - NEVER TYPE A TABLE OF CONTENTS OR TABLE OF AUTHORITIES: This is a giant waste of time and will almost always be incorrect if you subsequently edit the document. Word has features for both of these things that creates tables which can be automatically updated after the document is edited. Again, this is beyond the scope of this class. If you'd like the chapters from our full Word manual which explain how to create these, just send me an email to bhenley@affinityconsulting.com and I'll email you a PDF of those chapters.

Champagne Legal Technology On A Beer Budget

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Champagne Legal Technology On A Beer Budget

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Champagne Legal Technology On A Beer Budget

I. **YOUR ETHICAL DUTIES**: If your technology fails you, it can preventing you from working and taking care of your clients. If you lose control of client data or it is disclosed in violation of Rule 1.6, it can obviously result in malpractice actions against you. So this seminar is about *safely* spending less, but not compromising on data security and functionality.

II. **SAVE MONEY BUT DON'T BE CHEAP**:

A. **Some Things Are Worth Spending More On**: There are some things worth spending a little more money on to ensure that you're getting the quality and performance you need. For example, if you spend 10+ hours a day in front of a computer, then it makes sense to buy one that will be enjoyable to use. Faster processors, lighter laptops, bigger monitors and nicer keyboards all cost a little more. If you're talking about something you use constantly, every day, then remove it as a cost-cutting target. Getting the best deal you can on high-quality technology is always better than buying under-powered, under-performing technology just because it costs less.

B. **Cheap Software Often Requires Painful Trade-Offs**: For example, we recently worked with a firm that just didn't want to spend money on legal industry standards like Microsoft Exchange & Outlook. So they went with open source[1] software instead. Open source means that they paid nothing for the software. While it's nice to pay nothing for software, that also means that there's no one to call for technical support and that it integrates with nothing. By contrast, Exchange and Outlook integrate with almost *everything*. For example, almost all matter management programs sync with Exchange/Outlook. Every Windows and Mac computer, every Android or iOS tablet and every Windows, Android, Blackberry and iOS smartphone wirelessly sync with Exchange/Outlook. Document management programs *all* integrate with Outlook. Adobe Acrobat has an incredible integration with Outlook. The list goes on. The end result of this open-source money saving strategy for the firm in question was that all of the users hated the feature-deprived email software, it linked with nothing else they used and no one could get their email, calendar or contacts from the free email software to sync with their tablets or phones.

You can get free office suites including word processors (see www.openoffice.org for example), free PDF creation programs (see www.cutepdf.com for example),

[1] Generically, open source refers to a program in which the source code is available to the general public for use and/or modification from its original design free of charge, i.e., open. Open source code is typically created as a collaborative effort in which programmers improve upon the code and share the changes within the community. Open source sprouted in the technological community as a response to proprietary software owned by corporations. see http://www.webopedia.com/TERM/O/open_source.html, by Vangie Beal.

and free Fax services (see https://faxzero.com/ for example). However, they're not the legal-industry standard, they generally have non-existent technical support and they integrate/link with nothing else. In short, they're just not worth it.

C. **Waiting For Technology To Die Is The Worst Way to Upgrade**: Many law offices use their existing technology until it dies. This is a really bad idea for the following reasons:

1. **Data Loss**: Using anything until it no longer works often means there is no opportunity to transfer data, programs, etc. from the old device to the new one. Transferring data while the old and new devices are still working is typically a lot easier than trying to restore data from a dead device onto a new one.

2. **No Time To Research**: If someone's computer just died, you don't have time to conduct a lot of research to ensure you're getting the best replacement technology at the best price.

3. **No Time To Wait For Something To Ship**: You always get better deals from online vendors than bricks and mortar vendors. However, if whatever piece of technology is mission-critical, then you might not even have time to wait for something to be shipped to you (or built and shipped to you like a custom computer configuration). This means you'll have to go to the nearest store and buy whatever they have in stock, regardless of whether it's appropriate for your use or your office.

4. **No Time To Negotiate**: If you're buying more than 1 of anything, then you are in a good position to negotiate price. If you buy everything 1 at a time as old technology dies, then you give up that leverage and you pay the most.

5. **End Up With a Hodge-Podge Mix of Technology**: Problems with having a varied mix of technology include the following:

   a. It's more expensive to maintain computers of different types/brands/models bought at different times than it is to maintain a set of identical computers bought together.

   b. Users can't easily help each other if your office is using Office 2003, 2007, 2010, 2013 and 2016.

   c. If you have 5 different printers, then you have to keep 5 different toner cartridges at all times.

d. If you haven't upgraded software in a long time (5 years or more), it may no longer be supported by the manufacturer which means you don't have any technical support options.

III. **<u>BUILDING YOUR BUDGET</u>**: Whenever you're going to spend a lot of money or buy a lot of different things (which may or may not add up to a lot of money), the best first step is to create a budget. For example, here's a screenshot of a sample budget (which I'm happy to email you if you'd like something to start with):

Your Firm Budget

Description	Quantity	Unit Price	Subtotals	Grand Totals
Computers				
Notebooks: Dell Latitude E6430 notebook computers - includes dual 23" monitors, docking station, 3 yr/next business day/on-site warranty and 3 yr accidental damage protection, DVD/RW, webcam, backlit keyboard, fingerprint reader for security, bluetooth, Microsoft Office and Adobe Acrobat XI	2	$2,319.58	$4,639.16	
Desktops: Dell OptiPlex 7010 desktop computers - includes dual 23" monitors, 3 yr/next business day/on-site warranty , DVD/RW. Do not include MS Office because they won't leave the office.	1	$1,458.02	$1,458.02	
Services: Computer set up & configuration - fix defaults with Windows 7 and MS Office, download all updates to Windows & Office, install antivirus software - go through 8 page checklist on each computer.	3	$300.00	$900.00	
Delivery & Installation: Deliver all new computers and hardware at your office, setup & install everything (computers, scanners, VOIP phones, and iPads); answer any questions; make sure everything works properly. FLAT FEE PER DAY	1	$1,650.00	$1,650.00	
Computers Total:			$8,647.18	$8,647.18
Tablets				
iPad w/ Retina Display 64 GB Black - Wi-Fi only (www.amazon.com)	2	$672.95	$1,345.90	
Anker® Ultrathin iPad Bluetooth Wireless Keyboard Aluminum Cover with Stand for iPad	2	$35.99	$71.98	
Tablet Total:			$1,417.88	$1,417.88

If you build your budget in a spreadsheet (Excel, for example), it gives you the flexibility to play with the quantities and prices to see how it impacts the total. This process also helps you think of every possible thing you're going to need. Surprises are what can ruin budgets so writing it all down helps avoid them which giving you a realistic idea of what it's all going to cost.

IV. **<u>HOW TO FIND THE BEST DEALS ON LEGAL TECHNOLOGY</u>**:

A. **Strategy For Getting the Best Deals**: The following is a progression you can use to identify what to buy and then ensure you're getting the best deal on it.

1. **Identify the Players.** Many times you'll know the product category you want (like a scanner), but not which model is considered the best. Therefore, you first need to find out who the significant manufacturers are. Google makes this fairly easy. For example, if you Google "document scanner", you'll to see a list of brands (Brother, Epson, Fujitsu, HP, Canon & Xerox) and a few models, photos, and prices. Make a note of the manufacturers you find.

2. **Use Manufacturer Websites As A Starting Point.** Since you typically have an idea of what you're willing to spend, visit the manufacturer web sites in order to determine which of the products is in your price range and has the feature set you're looking for. Note that the prices you see on a manufacturer's web site are usually the worst-case scenario. You don't necessarily want to buy something directly from the manufacturer, but the manufacturer's website usually helps to determine the general price range and they always provide comprehensive information about product functionality.

3. **Read What The Critics Are Saying**. After you've narrowed down your search to a couple of models from different manufacturers, your next task is to find reviews to help you determine which model is the best. There are several magazine websites I recommend visiting for tech reviews. All of the following are free except Consumer Reports: Legaltech News (https://www.law.com/legaltechnews), Laptop Magazine (www.laptopmag.com), PC World (pcworld.com), Consumer Reports (consumerreports.org - $26/year but worth it), Popular Science (popsci.com), Popular Mechanics (popularmechanics.com), and Wired (wired.com). A few other great web sites for reviews include reviews.CNET.com, Engadget.com, PCMag.com, Epinions.com and ConsumerSearch.com. Amazon.com also posts valuable customer reviews for products they sell. Another great resource is Become.com. Just enter the product you are considering, click the Research button and you'll be presented with a list of reviews of that product.

4. **Use a Google Trick for Searching a Particular Site**. Sometimes I search for a product on a site using the site's *own* search function and come up blank even when I know they previously published something about that product. This is when a Google trick comes in handy. Let's say you're trying to find a review of the Fujitsu ScanSnap iX500 (scanner) on PCMag.com. Simply Google "scansnap iX500 site:www.pcmag.com" (omit quotation marks), and your first hit is their review. For whatever reason, Google often searches a site better than the site searches itself.

5. **Use The Product Part Number To Find The Best Prices**. Once you've decided which product to buy, locate the manufacturer's part number from either the manufacturer's web site or any vendor that sells the product. The part number will help you avoid confusion because many times there will be multiple versions of a product with slightly different part numbers. For example, Fujitsu makes five versions of the ScanSnap iX500 scanner with different part numbers (due to different included software bundles and whether the scanner works with Windows or Mac). There are many sites that offer price comparisons among vendors. If you

plug your part number into any of these sites, they'll return a list of vendors and pricing. Consider the following:

a. https://www.google.com/shopping (my favorite)

b. Shopper.com

c. Shopzilla.com

d. Become.com

e. PriceGrabber.com

f. StreetPrices.com

g. Shopping.Yahoo.com

6. **Always Consider Shipping Costs**. If you go to a site like Google.com/Shopping, enter a part number, and click the search button, you'll be presented with many options. If you click the "Compare Prices" button below that, you'll see an option to enter your zip code just above the price list. Make sure you do this because the site will then calculate shipping and a total price on the item you are researching from each vendor. Many vendors with low product prices will also have unreasonably high shipping costs so you need to take that into consideration when choosing a vendor. After you've entered your zip code, make sure you click the link that will show you all online stores because initially it will only show you a few.

7. **Pay Attention to Vendor Ratings**. There are a variety of services that allow consumers to review vendors; and most of the price comparison services display vendor ratings along with prices. Some of the rating services include BizRate.com, Google Checkout Reviews, Epinions.com, and ResellerRatings.com. In any event, you want to avoid vendors with less than 4 out of 5 stars or vendors with no ratings or only a few (indicating that they are very new). In the case of the scanner example I'm using here, I'm perfectly willing to pay a few dollars more for the scanner and get it from amazon.com rather than get it from some eBay seller which is cheaper but has no ratings at all.

8. **Due Diligence with Unfamiliar Vendors**: If you've never heard of the vendor you are considering, do a little more research. First, make sure their web site lists an address and phone number. I avoid vendors who do not disclose basic contact information prominently. Second, it's worth checking to see if there are any negative reviews of the vendor on the web. For example, if you are considering buying something from

MicroCenter.com, you could Google "reviews www.microcenter.com" (omit quotation marks). You could also check www.ResellerRatings.com, BizRate (http://tinyurl.com/4yghkee) or www.ComplaintsBoard.com for further vendor reviews.

9. **It Is Essential That You Read Return Policies**: If a vendor doesn't make their return policy readily available, I view that as a huge red flag. It is very important that you read return policies and check for restocking fees. For example, NewEgg.com is a well-respected vendor, but returns must be made within 30 days and they charge a 15% restocking fee on just about everything. By contrast, amazon.com allows returns within 30 days but has no restocking fee. Therefore, if my choice is between those two vendors and the amazon.com price is higher but close to NewEgg, I'm going with amazon.com every time. In fact, there have been many times when I paid a little more for something at amazon.com because I know from personal experience that they are incredibly easy to work with on returns.

10. **Stock Indicators Are Important**: Always look for a stock indicator on the vendor's website because you don't want to order something they don't have and possibly won't have again for weeks. If a web site doesn't have a stock indicator for the product I'm considering, I simply won't buy it from them even if it's cheaper. It's not worth saving a few dollars only to wait 3 weeks for your product to show up.

11. **Note The Condition.** If using Google.com/Products to search prices, make sure to note the "Condition" column. This will tell you if the product you're looking at is refurbished, used, or new. I would recommend avoiding refurbished or used products; and the lowest price is frequently for a uses or refurbished product.

12. **Skip the Extended Warranty Unless You're Buying a Computer**: Unless you are buying a desktop or laptop computer, it's not worth buying the extended warranties which are typically offered at checkout. Of course, if you have a propensity for dropping or losing things, maybe you should consider one anyway. Otherwise, extended warranties generally represent a big profit center for vendors because they're hardly ever used and sometimes contain exclusions for things like accidental breakage.

13. **Create An Account Upon Checkout.** Depending upon the vendor you've chosen, you will likely be presented with the opportunity to "create an account". I recommend doing this because it makes it easier to track your orders and return an item if necessary. If given an option, I prefer not to allow the vendor to store my credit card information although I do not see

a problem with them storing my name and address since it makes it a lot faster to check out the next time I buy something.

14. **Always Check For Discount Codes.** During the checkout process, you may see a box asking you to enter a Coupon Code or Discount Code if you have one. If you do not have one, go to RetailMeNot.com or CouponCabin.com and search for vendor coupons on those sites. I easily saved over $100 last year by using discount codes I found on those sites. It never hurts to look.

15. **Get A Separate Email Address For Buying Items Online**: Finally, if you do a lot of on-line shopping, I recommend signing up for a free web-based email address that you use solely for purposes of buying things (Gmail, Yahoo, Hotmail, etc.). The email address you use for online purchases will tend to receive lots of special offers and other SPAM you don't want showing up in your main inbox every day.

B. **Contact the Manufacturer for Recommended Consultants**: Most legal-tech manufacturers rely heavily (if not exclusively) upon a network of outside consulting firms for product installation, customization and training. You can always check the manufacturer web-site for a list of consultants. Not only will you typically get expert help, but many of them re-sell the products at a discount.

C. **Legal-Specific Email Lists or List Servs**: These are emailed discussion lists on just about every topic under the sun. Most state bar associations have them available. Regardless of whether your state bar offers them, consider the grand-daddy of legal email lists - the American Bar Association's Solosez. It's for lawyers who are practicing alone or in a small firm setting and it has 3,000 subscribers. Best of all, *you don't have to be an ABA member* in order to join and it's free. Go to http://tinyurl.com/2b886 to join. If you're considering buying something, post it there. You're bound to get lots of commentary on whether the product is good or not and what kind of pricing others have found.

D. **Legal Tech News**: See https://www.law.com/legaltechnews. Great place to get reviews and feedback.

E. **Technolawyer**: See http://www.technolawyer.com/ - great email service discussing nothing but legal technology news.

F. **Get a Price Online, Then Call and Ask for a Discount**: If you're going to buy from an online vendor, go to their web site and get the pricing on what you want to buy. Now call them and ask if the sales rep you talk to will beat the price you got on their web site. If they refuse, then ask for free shipping, ask them to throw in some software or upgrade the software you want (i.e., Microsoft Office basic to Microsoft Office small business edition). If you don't ask, you don't get. Most sales reps have some leeway in pricing and since their compensation is typically

based upon sales, they'll have an incentive to get you a price that will inspire you to buy from them rather than the web page.

G. **Look for Previous Versions of Software or Hardware**: For example WordPerfect X9 Pro is the current version and costs $399, but you can get a great deal on X8. Is there a big difference between the two? No. WordPerfect Office X8 Professional can be purchased for $89 from eBay.

H. **Look For Non Manufacturer Parts**: For example, an AC adapter (90W) for a Dell Latitude notebook computer is $70 (Dell part number C120H). A quick search on Amazon.com for that same part number reveals that a generic adapter certified to work with a Latitude costs only $9.69. If you really want the Dell branded adapter, you can get it for $25 from www.getpartsonline.com.

I. **EBAY Is A Great Source**: If you're looking for software, read eBay's instructions on How To Buy Legal Software On An Auction Site[2]. Then see what you can find. There are great deals to be had. For hardware, there are tremendous discounts if you're willing to take the minor risk of buying via auction or direct from an eBay seller.

J. **Look for Download Software**: Many software companies offer slight discounts if you'll buy a download only version of their software. In other words, you don't get a DVD and a manual. You just get a downloadable file which installs the software. Of course, you can burn that file to a DVD afterwards so you'll easily be able to re-install it later if necessary.

K. **Do Not Limit Your Search for Computer or Tech Help To Your Local Area**: Installation, integration and training can be a significant portion of your overall budget. Keep in mind that there is no reason to limit your search for computer/tech help to your local geographic market. Thanks to things like managed services[3] and tech support software which allows a vendor to take over any computer in your office and fix things without being on-site. The installation and training typically occurs at your office (IT folks with a national practice have no problem visiting your office), but after-care can easily be done remotely. Here's how this can save you money:

1. **Find An Expert**: Your local IT person might be able to read manuals and partially figure out how to install a case management or legal accounting program. However, unless it's something they regularly do, it's extraordinarily likely that they'll make a mess of it and the program won't

[2] http://tinyurl.com/axoguxr

[3] **Managed Services** means that all servers, backups, notebooks and desktop PCs can be maintained remotely by an IT company and you won't have technicians at your office unless there is a physical hardware failure which would require someone on-site. This also covers all technical support/help desk for all users (Word, Windows, Outlook, etc.).

be set up correctly. If you look outside your geographic market, you will unquestionably be able to find an expert in that particular program which will take far less time to handle the installation and will do it right. Having to clean up a mess created by someone who tried to handle an installation they didn't understand is always more expensive than having it done right in the first place by someone who may cost a little more.

2. **Less Expensive**: The market rate for IT help in major metropolitan areas is always higher. Therefore, you can often save yourself money by working with an IT company located in a smaller market because their rates are going to be commensurate with that smaller market. For example, we have many clients in L.A., Pasadena and San Diego and it's not just because we're good at what we do. It's also because even including travel expenses, we're often less expensive than IT companies located in those areas.

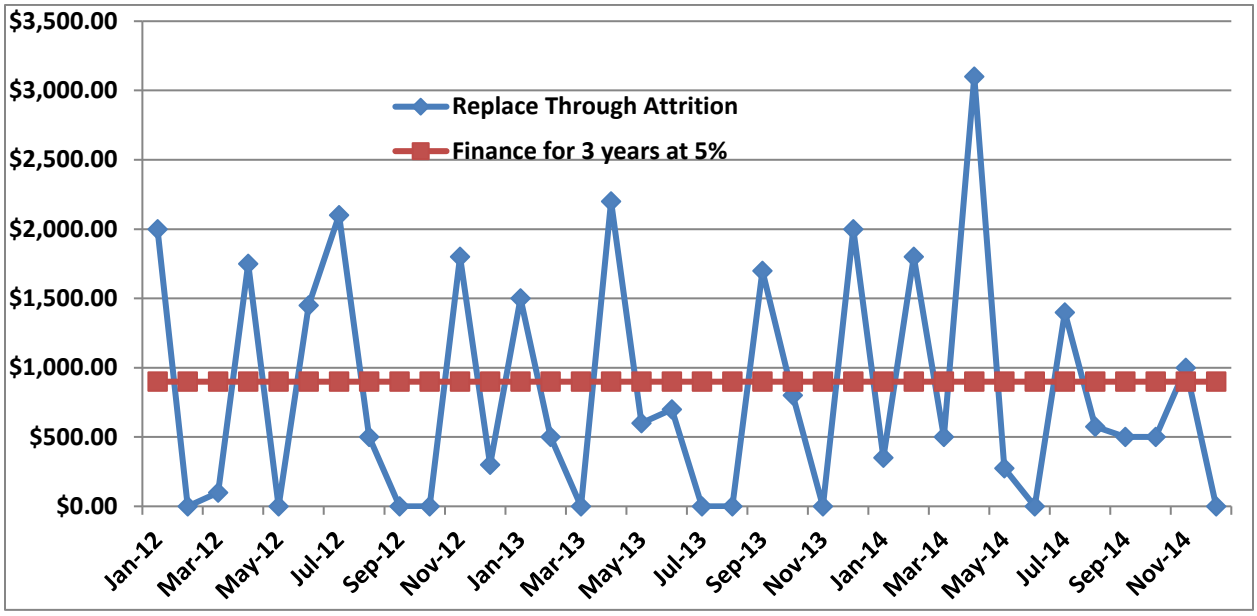
3. **Higher Quality Help**: Let me illustrate this with an example. A lawyer from a small town had a file server and was trying to get his new Android smart phone to synchronize wirelessly with Outlook. His local IT folks couldn't get it to work and he was so frustrated that he was about to take the phone back and give up. He called us as a last-ditch effort to get it working and because we have lots of experience getting all types of smartphones to sync with Outlook, we were able to determine that it wasn't working because his local IT people had failed to install a major service pack on his Windows server. After his local folks got the service pack installed, the sync began working. So the benefits were that he only paid for an answer, his local people were able to execute the solution and he now knows to keep on top of his IT folks so they are installing necessary updates on his server and computers.

V. <u>PAYING FOR IT</u>:

A. **Financing Legal Technology**: Many law firms (particularly small firms and solo practitioners) like to pay cash for everything. This aversion to debt or financing encourages law firms to replace their hardware and software through attrition because it's less expensive (up front) to do it that way compared to buying all new everything in one shot. However, this approach means that the firm is subject to unexpected technology expenditure spikes whenever a piece of hardware or software needs to be replaced. For example, a firm may have no expenditures on technology in January; then have to drop $3,000 in February because someone's computer crashed and they needed a new printer; then nothing in March; then $500 in April; then $1,700 in May; nothing in June; etc. It's impossible to budget for these kinds of expenditures because you don't know what they're going to be and they can wreck your cash flow for the month if they're large enough. If you

buy all new equipment as described above in a single purchase and get a three year, next business day, on-site warranty on all of the hardware, you're extremely unlikely to have any unexpected tech expenditures during that time. Therefore, we recommend a three year lease or loan to finance all of your technology needs. At the end of the loan/lease, you unload the existing equipment, buy new hardware and start over again. The result of this system is that you'll always have a technology payment; but on the upside, it's a low, even monthly payment you can budget for. This is a much better alternative to the large, random, unexpected budget-killing technology expenditures you're likely to incur otherwise.

For example, assume an annual technology expenditure for a small firm of $10,000 (which is not unreasonable). Consider the graph below. The blue line is the random expenditure of $30,000 when technology is upgraded or replaced through attrition over three years. The red line is financing $30,000 at 5% interest which would yield a flat monthly payment of $899. Which one would you rather deal with?



B. Technology Leasing for Lawyers - A Primer:

1. **Deduct Payments as an Operating Expense**: Your CPA will have to confirm this, but in the US, if you utilize an "operating lease" rather than a "capital lease" (with a fair market value end-of-lease purchase option rather than a $1 end-of-lease purchase option), you can deduct every lease payment as an operating expense. This would enable you to effectively deduct the entire cost of the computers over 3 years rather than 5 (which is what you have to do if you depreciate them).

2. **Disposal**: Computer leasing companies like the one Dell has in-house will literally take back the computers at the end of the 3 year term. This may remove the sometimes significant headache of disposing of the old computers.

3. **Leasing Pros and Cons**: An outstanding article on this subject from Law Office Computing is attached as **Error! Reference source not found.** which l ays out all of the pros and cons. A few good points from the aforementioned article:

   - "Computer technology leasing is an attractive option because computer systems get outdated quickly. There are good reasons to keep pace with technological change. Experts consistently recommend replacing computers on a three-year schedule. After three years, the typical computer has little or no market value and no longer will be covered by warranty. Hardware costs, especially for servers, add up quickly. Large cash outlays for new purchases might be required."

   - "Leasing is especially attractive to law firms that want to stay closer to the cutting edge in technology. It levels out their cash flow and protects their working capital while avoiding large periodic expenses for new technology purchases."

   - "Smart leases give you a way to roll services, hardware and software into your monthly lease payment. This type of bundling allows a firm to consider an appropriate monthly cost of technology and aim a little higher on hardware, without cutting corners on training and support. For example, a bundled lease might even provide a way for a smaller firm to afford a high-level consulting firm, better software or a robust network infrastructure."

VI. **SECURITY RECOMMENDATIONS**: Doing nothing won't meet the reasonableness standard required by the rules of professional conduct. However, you don't have to go broke in order to protect yourself and your clients.

A. **Lawyers Must Encrypt Laptops, Tablets and Phones**:

1. **Duty To Protect**: If you are carrying confidential client data on any of these devices, "reasonable efforts" to maintain confidentiality cannot possibly include doing nothing to protect it.

> "Not properly protected, laptops and portable media can be recipes for a security disaster. One survey reported that 70 percent of data breaches resulted from the loss or theft of off-network equipment (laptops, portable drives, PDAs, and

USB drives). Strong security is a must. Encryption is now a standard security measure for protecting laptops and portable devices—and attorneys should be using it."[4]

2. **PC Encryption**: If you've got a notebook computer, there's always the chance that someone will steal it or that you'll misplace or otherwise lose it. If you have confidential client information on the laptop, then it would be prudent for you to encrypt the laptop. Encryption would prevent a thief or finder of your laptop from obtaining any information from the hard drive, even if they remove the hard drive and install it in another computer. There are many choices for this type of software, including the following:

   a. **BitLocker** - included for free with the Pro versions of Windows 8, 8.1 & 10.

   b. **Mac FileVault** - included for free with OSX.

   c. **SecuriKey Pro** - https://www.securikey.com/

   d. **Symantec Drive Encryption** - http://tinyurl.com/39seow

   e. **AlertBoot** - http://tinyurl.com/63h36wt

   f. **Folder Lock** - http://www.newsoftwares.net/folderlock/

   g. **SecureDoc Full Disk Encryption** from Winmagic Data Security - http://tinyurl.com/4vek6ot

3. **Smartphones**: All of the smartphone operating systems have free encryption built in, you must only enable it. Make sure you do this.

4. **Tablets**: Like smartphones, Android and iOS tablets have built-in encryption that you must simply turn on. Windows tablets may also have BitLocker depending upon the version of Windows installed. Of course, any of the Windows encryption options above would also work (besides BitLocker).

B. Email Encryption:

1. **What The Experts Say**: Here are a couple of quotes to consider.

   "A secure email account that the attorney is assured protects the content of correspondence. No attorney

[4] Encryption Made Simple for Lawyers, by David G. Ries & John W. Simek, GP Solo, November/December 2012 - see http://tinyurl.com/znh4jqz

should use Gmail or other free services that in fact admit that they use personal information from email content. They should encrypt their client correspondence. Before sending sensitive correspondence, they should check by phone or text with the client to see what method of delivery is preferred."[5]

"The level of encryption may vary based on practice areas or, more importantly, the firms' clients. At a minimum, emails and attachments that contain confidential data should be encrypted or sent through collaboration tools that send encrypted links rather than plain text data."[6]

"It's all about encryption of the 3 main risk areas for data held: data in transit, at rest and in backups. It doesn't matter if it's email, Instant Messages, case files, discovery or 3rd party expert communications, the principle of encryption is the ONLY way you can really satisfy due diligence requirements."[7]

2. **Email Encryption Services**: There are many ways to encrypt email, but the easiest is to use an encryption service. The options listed below are inexpensive and easy. They encrypt both the emails and any attachments to the email. In most cases, a password must be entered by the recipient to open the email and any attachments.

   a. **Protected Trust**: https://envoy.protectedtrust.com/ - this is easily my favorite option. This is $15/user/month for the first user and $12/user/month thereafter.

   b. **Office 365 Message Encryption**: http://bit.ly/2UGKIFx - this is included with the E3 and E5 Office 365 bundles.

   c. **SenditCertified**: http://www.senditcertified.com/ and note that they offer discounts through several bar associations.

   d. **EchoWorx Encrypted Mail**: http://tinyurl.com/h6sm668

   e. **Hushmail**: https://www.hushmail.com/

[5] Law Firm Data Security: Experts on How to Protect Legal Clients' Confidential Data, by Nate Lord, DigitalGuardian, October 13, 2015, quoting Robert Ellis Smith. See http://tinyurl.com/h6nzvjb.

[6] ibid., quoting Marco Maggio.

[7] ibid., quoting Steve Santorelli.

f. **RMail**: http://www.rmail.com/ - registered email service which can prove delivery + encrypted email

g. **ZixMail**: https://www.zixcorp.com/

h. **ShareFile**: https://www.sharefile.com/

3. **Encrypt Email Attachments**: Word, WordPerfect and every good PDF program including Acrobat offers file encryption. This functionality is built-in so you only have to learn how to use it. With file encryption file simply cannot be opened without a password. You email could unencrypted and simply say "Please see attached." However, the attached file containing the sensitive information would be encrypted on its own.

C. Wireless Encryption:

1. **Home or Work Wireless Connections**: If you rely on a wireless Internet connection at your office or home to work with sensitive client information, it goes without saying that your wireless router or access point should be properly encrypted. If you set it up yourself and aren't sure, then you should immediately secure the assistance of an expert to ensure that your security is properly configured. Sometimes, it's as easy as calling the technical support line for the manufacturer of your router. The big companies that sell wireless routers all have technical support representatives that can walk you through the process over the phone. In case you're wondering, big names in wireless routers include Cisco, Linksys, Netgear, Belkin, TP-Link, D-Link and Asus, among others.

2. **Risk of Using Public WiFi**: First of all, you need to be educated about this subject. For a quick primer, here are two short articles that will bring this issue into focus: Here's what an eavesdropper sees when you use an unsecured Wi-Fi hotspot by Eric Geier, 6/28/13 (see http://tinyurl.com/ppm3oyc) and What Is A Packet Sniffer? by Andy O'Donnell, 12/15/14 (see http://tinyurl.com/jxvhf92). For an interesting discussion of this in the legal arena, see the now famous California Formal Opinion No. 2010-179 which states:

> "With regard to the use of a public wireless connection, the Committee believes that, due to the lack of security features provided in most public wireless access locations, **Attorney risks violating his duties of confidentiality and competence in using the wireless connection at the coffee shop to work on Client's matter unless he takes appropriate precautions, such as using a combination of file encryption, encryption of wireless transmissions and a**

personal firewall. Depending on the sensitivity of the matter, Attorney may need to avoid using the public wireless connection entirely or notify Client of possible risks attendant to his use of the public wireless connection, including potential disclosure of confidential information and possible waiver of attorney-client privilege or work product protections, and seek her informed consent to do so."[8]

3. **How To Protect Yourself**:

   a. **Cellphone WiFi Hotspot**: Rather than connecting to the public WiFi where ever you are, consider using a cellular hotspot or MiFi. Properly configured, these connections are a secure way to connect your notebook or tablet to the Internet via the phone hotspot.

   b. **Consumer VPN Services**: There are many services that allow you to create a Virtual Private Network connection even though you're using a public and otherwise unsecured WiFi connection. "In the simplest terms, a VPN creates a secure, encrypted connection between your computer and the VPN's server. This tunnel makes you part of the company's network as if you are physically sitting in the office, hence the name. While connected to the VPN, all your network traffic passes through this protected tunnel, and no one in between can see what you are up to. A consumer VPN service does the same thing, but extends that protection to the public."[9] Here are some options for this. Private Internet Access is the one I use personally.

      i. **Hide My Ass**: https://www.hidemyass.com/

      ii. **Private Internet Access**: https://www.privateinternetaccess.com/

      iii. **IPVanish**: https://www.ipvanish.com/

      iv. **PureVPN**: https://www.purevpn.com/

      v. **Cloak** (Mac only): https://www.getcloak.com/

[8] See http://tinyurl.com/3szklcx, emphasis added.

[9] The Best VPN Services for 2016, by Max Eddy, Fahmida Rashid, 3/9/2016, PCMag - see http://tinyurl.com/njuv7br.

vi. **CyberGhost**: http://www.cyberghostvpn.com/en_us

vii. **VyprVPN**: https://www.goldenfrog.com/vyprvpn

viii. **NordVPN**: https://nordvpn.com/

ix. **Hotspot Shield Elite**: https://hsselite.com/

x. **Spotflux Premium**: http://spotflux.com/

D. Firewall:

1. **What Is a Firewall**: A firewall is a network security system designed to prevent unauthorized access to or from a private network. Firewalls can be hardware, software, or a combination of both.[10]

2. **Your Obligation**: You need to ensure that a firewall is in place at your office and anywhere you use your computer and connect to the Internet. You can test yourself using services like ShieldsUP![11] or HackerWatch[12]. If you aren't sure if you are being protected, then you should contact a security expert to conduct a penetration test. Penetration testing (also called pen testing) is the practice of testing a computer system, network or Web application to find vulnerabilities that an attacker could exploit.[13]

3. **Costs**: Windows Pro and Mac PCs have software firewalls built in. A good hardware router/firewall will cost about $200 (see the Asus Tri-Band Gigabit (AC3200) WiFi router, for example ($189 @ amazon.com).

E. Password Manager:

1. **What Is a Password Manager**: A password manager is a program that helps one store, create and organize passwords (and logons and websites, etc.).

2. **Why You Need A Password Manager**: First, it's part of your estate plan. Second, it's a place to keep logons, websites, account numbers and passwords all in one place. I use Dashlane and it will generate and store strong passwords for me (so I don't have to make them up). It will also let me know if my passwords are weak and recommend that I change them. It tells me how many different websites I'm using the same password for

[10] See http://www.webopedia.com/TERM/F/firewall.html

[11] See https://www.grc.com/x/ne.dll?bh0bkyd2

[12] See http://www.hackerwatch.org/probe/

[13] See http://searchsoftwarequality.techtarget.com/definition/penetration-testing

(it's not recommended that you use the same password for everything). It also lets me know if there are any reported security breaches for any of the websites it holds passwords for and recommend that you change them. Finally, it will hold all of my credit card information, secure notes about anything I want and personal information like my driver's license, passport, etc.

3. **Good Options**: Top rated password managers include the following (and I strongly recommend the versions you have to pay for - almost all offer a free version that is missing features):

   a. **Dashlane** - https://www.dashlane.com/ - this is only $3.33/month

   b. **LastPass** - https://www.lastpass.com/

   c. **1Password** - https://1password.com/

   d. **Sticky Password** - https://www.stickypassword.com/

   e. **LogMeOnce** - https://www.logmeonce.com/

   f. **TrueKey** - https://www.truekey.com

   g. **RoboForm** - https://www.roboform.com/

   h. **Keeper Desktop** - https://keepersecurity.com/

VII. COMPUTER CONSIDERATIONS:

A. Why Lawyers Should Buy Notebook PCs Instead of Desktop PCs: The bottom line is that notebooks are more expensive and less powerful. However, neither the price nor the performance gap is very big; and there are lots of other reasons to go with the notebook option.

1. **Prices Are Very Close Between Notebooks and Desktops**: Notebooks are more expensive than desktops, but the gap is nowhere near what it was just 5 years ago. The price difference fluctuates, but a notebook PC will typically cost $150 to $350 more than a comparably equipped desktop.

2. **Work Anywhere**: If having a notebook lets you work just one time per year under circumstances you would have been otherwise unable to work, then you've easily justified the extra $350 you paid for the notebook. In fact, if the difference were $1,000, I'd argue that it's still easily worth it.

3. **Docking Stations Make a Notebook Feel Like a Desktop**: Docking stations are also known as “port replicators.” They allow you to connect your

notebook to many external devices at once. For example, when I dock my notebook, I am instantly connected to two external monitors, an external (full size) keyboard and mouse, my scanner, my external hard drive (for backup), my network, the internet, printers, and my external speakers. At the end of the day, I simply undock and I'm disconnected from all of that. They make it fast and easy to connect or disconnect. They also allow me to use full-size peripherals (monitors, keyboards & mice) when I'm at the office.

4. **Take Your Files With You**: If you use scanners to create complete digital files, you can take those digital files with you on a notebook where ever you go. Very importantly, it doesn't matter whether you have an internet connection. If you have complete digital files, then they can easily be loaded onto a laptop and taken with you. This is the ultimate in practice mobility.

5. **Access Your Office From Anywhere**: Thanks to widespread Wi-Fi hotspots, aircards and the ability to use your cell phone as a hotspot, you can get internet access from almost anywhere. If you have remote access options to your office, then a notebook is the key element to creating an office where ever you happen to be.

B. **Have Only One Computer**: If you're going with a laptop, use it everywhere and don't bother buying a desktop for the office and a laptop for when you need to travel. Having two computers just makes it difficult to make sure you have everything you need on each one.

C. **Save Money by Avoiding Apple**: I know some people feel very strongly about this issue, but since this seminar is about saving money, this needs to be said. There was certainly a time when Apple computers were superior to Windows computers generally. However, that time has passed. A tier 1 Windows machine is equivalent to or better than a Mac, and they cost a lot less for better configurations and warranties.

1. **High-End Windows Machines Are Superior and Less Expensive**: To compare prices, I configured a Windows notebook computer and a MacBook Pro 15 notebook computer with matching configurations (or at least as close as I could get them). The price for the Dell Windows computer (Dell Latitude 5591) was **$2,138**; and the MacBook was **$3,178**. That means that the Mac is **$1,040** more expensive than the Dell (49%). Furthermore, while the Mac has only 4 Thunderbolt ports, the Dell has three USB 3.1 ports, a VGA port, an RJ45 network jack, HDMI port, DisplayPort port, Thunderbolt 3 port, and a smart card reader. No dongles required. The dell also had a touch screen (not even an option on the Mac), DigitalPersona finger print reader for enhanced security (not offered on

the Mac), and a much better warranty because it's on-site anywhere in the continental U.S. (and it also includes 3 years of accidental damage protection). Even Apple's best laptop warranty is not on-site and you have to take your laptop into one of their stores or authorized service centers. The Dell even has a slightly bigger screen at 15.6" compared to the Mac's 15.4". Of course, Windows machines also include antivirus and antimalware software which is built into Windows (no similar inclusion with the Mac).

The argument that Windows machines might cost more over their life due to more technical support problems than a Mac is also false. The computers described above are *both* covered by 3 year warranties and accidental damage protection. The Windows machine even has an on-site warranty which is going to cost the owner less since you don't have to take your laptop to an Apple store and stand in line. The point is that with the Windows machine, there isn't a single thing that can happen which would cost the owner anything because everything is covered, even accidents.

2. **Desktop Computer Configuration**: I don't imagine many people are buying desktops today, but the iMac I configured was 48% more expensive than a comparably equipped Dell All In One. In spite of the price difference, the Windows PC had a faster processor, a larger screen and the warranty was better.

3. **Limited Support with Apple**:

    a. **Network Support**: If you want to set up a network with Apple PCs, you're going to find vastly fewer support options than with Windows PCs.

    b. **Support**: Apple doesn't offer on-site warranties with its laptops. Therefore, you'll have to ship it to them for service or find an Apple Store or other authorized service center and take it there. Desktops to offer on-site support, but it's a last resort.

4. **Most Legal Specific Programs Will Not Run on the Apple Operating System**: For example, many legal case management applications and time/billing and accounting programs will not run on the Mac OS. The best document assembly or trial presentation programs also do not work on a Mac. Finally, I've never seen a practice area-specific program that would work in the Mac OS. For example, leading Bankruptcy programs like Best Case and leading estate planning drafting systems like WealthDocx only work in Windows. Yes, you could run Windows on a Mac and use those programs. However, you have to BUY Windows first and install it on your

Mac. Furthermore, many programs require a Windows server in order to run so you wouldn't be able to use an Apple server.

D. **Don't Be Afraid of a PC with an AMD CPU**: AMD processors aren't currently as fast as Intel's fastest offerings, but they're close and they cost less, sometimes a lot less. More and more manufacturers are offering AMD processors and you'll have no problems with compatibility.

E. **Don't Buy the Fastest CPU**: You're always going to pay a premium to get the fastest CPU available at any given time and they just aren't necessary in a law firm environment. Therefore, look for a standard business computer one or two steps down from the fastest CPU to get the best bang-for-the-buck.

F. **How To Save Money**:

1. **Bar Association Discounts**: Most state bar associations offer computer discounts, some municipal bar associations do; and the American Bar Association (see http://tinyurl.com/n42zlt) does as well.

2. **Upgrade RAM Yourself**: If your computer allows it and you don't mind doing it yourself, it's usually less expensive to buy and install additional RAM yourself compared to getting it included with a new computer. Www.crucial.com is a great place to go for additional memory.

3. **Desktop PCs are Cheaper Than Notebooks**: In spite of my recommendation that you get a notebook, notebooks don't fit into everyone's budget. Desktops have always been less expensive than comparable notebooks and I expect that to continue into the foreseeable future. Therefore, it may make financial sense to get a desktop, particularly if you already have a computer at home that you can use for office work.

4. **Consider a "Budget" Notebook PC**: Every PC maker (except Apple) makes a budget line of notebooks.

5. **Warehouse Clubs**: For example, both Sam's Club and Costco sell computers. You're not going to get a huge selection and the warranties aren't going to be great initially (you can usually pay more to upgrade the warranties), but in my experience, they have excellent prices on the systems they offer and they're usually well-known brands (Dell, HP, Acer, Asus, etc.).

6. **Consider "Refurbished" Systems from the Dell Outlet**: Check out http://tinyurl.com/39nqr and you'll be at Dell's "Outlet." Refurbished systems can be purchased at significant discounts, but you can still get the

3 year, on-site warranty. If you find one you like, be prepared to buy it immediately because they turn over their refurbished inventory constantly.

7. **Cut Back On Things You Can Easily Upgrade Later**: For example, it is easy to add RAM later. If you are buying a desktop PC, it's easy to add an additional hard drive for more storage space (either internal or external) later. Notebooks only have room for one hard drive internally so your only real alternative is to add an external hard drive unless you want to transfer your entire operating system from one computer to another. If you are going to use an external monitor (either desktop or notebook), you could continue using the one you had with your last computer until you've got enough money to buy a larger one for your new computer. Monitor technology doesn't change that much from year to year although you can buy much larger monitors for the same money. You can also save a few bucks by sticking with the cheapo basic wired keyboards and mice that come with new desktops. Later, you can drop $80 for a much nicer wireless keyboard/mouse combo.

VIII. **RENTING TECHNOLOGY**: Thanks to the Internet, there are many ways to rent technology instead of buying it. This approach avoids the up-front costs associated with out-right purchases, provides flexibility to change technological directions, and in many cases provides you with superior remote access.

A. **Case Management Options**: If you're unfamiliar with case management software, these programs handle file management, calendaring, contacts, tasks (to-do lists), time entries, communications (emails and phone calls), document management, document assembly, and can help you manage and share research. More importantly, each component feature is integrated with the others. For example, you can see all of the calendared appointments related to a particular matter (for everyone in your office) from within the electronic file. You never have to go look directly at someone's calendar for those things (which would be hard to find anyway). Anyway, here are some options for cloud-based case management.

1. **ActionStep**: www.actionstep.com

2. **AdvologixPM**: www.advologix.com

3. **CenterBase**: http://legal.centerbase.com/

4. **Clio**: www.goclio.com

5. **CosmoLex**: www.cosmolex.com

6. **Houdini Esq**: http://houdiniesq.com/esq.html

7. **LawRD**: www.lawrd.com

8. **MyCase**: www.mycase.com

9. **PracticePanther**: https://www.practicepanther.com/

10. **Rocket Matter**: www.rocketmatter.com

11. **Smokeball**: www.smokeball.com

12. **Zola Suite**: https://zolasuite.com/

B. **Digital Signatures**: A Digital signature (standard electronic signature) takes the concept of traditional paper-based signing and turns it into an electronic "fingerprint." This "fingerprint," or coded message, is unique to both the document and the signer and binds both of them together. The digital signature ensures the authenticity of the signer. Any changes made to the document after it is signed invalidate the signature, thereby protecting against signature forgery and information tampering. Digital signatures help organizations sustain signer authenticity, accountability, data integrity and non-repudiation of electronic documents and forms.[14]

1. **DocuSign**: www.docusign.com

2. **RightSignature**: www.rightsignature.com

3. **Adobe EchoSign**: www.echosign.adobe.com

4. **e-SignLive**: http://www.silanis.com/e-sign-products/e-signlive

5. **CoSign Digital Signatures**: http://www.arx.com/digital-signature

6. **HelloSign**: https://www.hellosign.com/

C. **Legal Accounting Options**:

1. **ActionStep**: www.actionstep.com (this program is both case management and full accounting)

2. **CosmoLex**: https://www.cosmolex.com/ (case management that also includes full accounting)

3. **CenterBase**: http://legal.centerbase.com/

[14] Definition from ARX - see http://www.arx.com/digital-signatures-faq

4. **Easy Legal Billing**: http://www.easylegalbilling.com/

5. **Bill4Time**: www.bill4time.com

6. **Legal Billing**: www.chaossoftware.com

7. **Toggl**: www.toggl.com

8. **FreshBooks**: www.freshbooks.com

9. **TimeSolv Legal**: http://www.timesolv.com/timesolv_legal.html

10. **QuickBooks Online**: http://quickbooksonline.intuit.com

11. **Xero**: https://www.xero.com/us/

12. **Case Management additional features**: Most of the foregoing case management programs also have accounting modules so they could be considered accounting options as well.

D. Time Tracking:

1. **Chrometa**: While running in the background while you work, Chrometa captures all of your time and allows you to categorize it for easy billing. See www.chrometa.com.

2. **Smart Time**: www.smarttimeapps.com - remote time entry for lawyers

E. Transcription Services:

1. **SpeakWrite** - www.speakwrite.com

2. **CopyTalk** - www.copytalk.com

3. **LawDocsXpress** - www.lawdocsxpress.com

4. **LegalTypist** - www.legaltypist.com

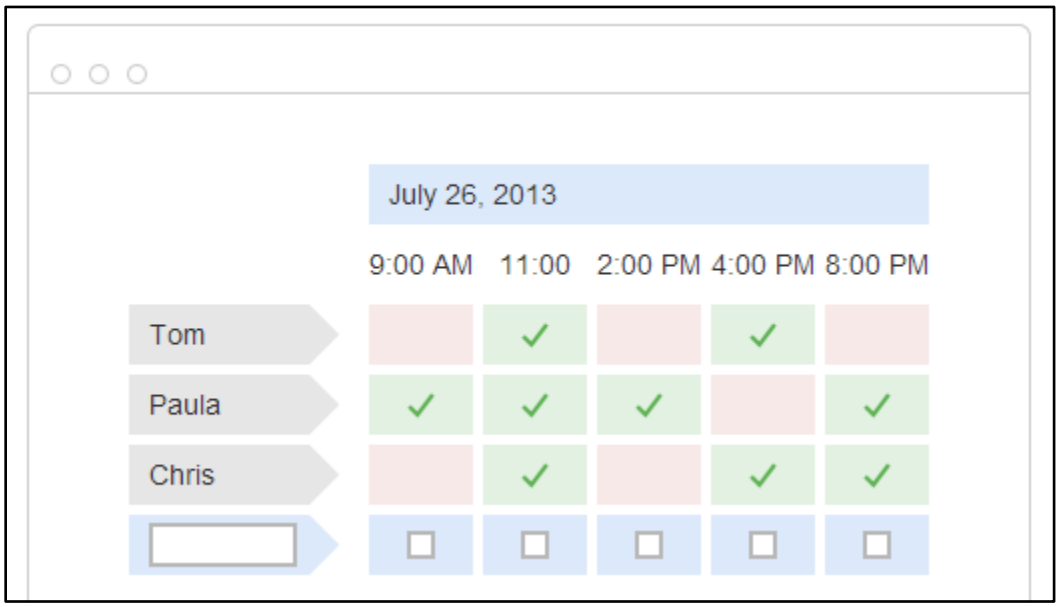
5. **VerbalLink** - http://verbalink.com

6. **GMR Legal Transcription** - www.gmrlegaltranscription.com

F. Group Calendaring: Ever feel like you are herding cats when trying to organize a good meeting time for a bunch of people? These cloud-based programs help you schedule meetings and other appointments with people outside your own organization's email and calendaring system. They are very simple, quick, and many are free or almost free. Usually the paid subscriptions are very inexpensive

and offer direct integration with Outlook, which means no switching between your calendar and the application.

Invitees receive an easy chart show available times and simply checks the times he/she is available. Other invitees can see the results immediately in a consolidated view.



1. **Doodle**: www.doodle.com

2. **WhenIsGood.com**: www.whenisgood.com

3. **ScheduleOnce**: www.scheduleonce.com

4. **TimeBridge**: www.timebridge.com

G. Credit Card Processing:

1. **LawPay**: www.lawpay.com

2. **LawCharge**: www.lawcharge.com

3. **Beacon Processing Solutions**: (www.beaconprocessing.com/attorney-solutions) - Beacon Processing Solutions does not provide services exclusively to attorneys, but they do have a special program for law firms that allows the attorney to choose between depositing funds into an operating account or into a trust account.

4. **Virtual Payment Systems**: http://tinyurl.com/o65l3j6 - they have a couple of programs designed just for lawyers: VPSpay.com - payments where you

get the full amount paid to you and transaction fees are charged to the payer. Traditional credit card processing where you firm is charged transaction fees to a designated fee account.

5. **Square**: https://squareup.com/Square. Square is a credit card processing system that allows you to take credit card payments using a free credit card reader that plugs into your iPhone, iPad, or Android device. Although Square does not have the functions to separate operating account income from trust account income, it is popular among attorneys taking cases where trust accounting is not an issue.

6. **PayPal**: www.paypal.com - may not comply with trust accounting rules but if that isn't an issue, this is a great service.

H. Word Processing:

1. **Google Docs**: www.docs.google.com

2. **Zoho Writer**: www.writer.zoho.com

3. **Microsoft Office 365**: Microsoft is now offering office in the cloud and it's fairly amazing. See http://tinyurl.com/ny7vlle for more information or paragraph VIII.U. below.

4. **ThinkFree Office Suite**: www.thinkfree.com

5. **HyperOffice**: www.hyperoffice.com

I. Document Management: Document management applications provide an electronic filing system for documents you've created in-house, documents you receive (they must be scanned), notes, emails & attachments to emails. Good document management systems provide things like full text searching (find any document by the words contained inside it rather than what it is called), security, and versioning (you can save dozens of versions of the same file with a full audit trail).

1. **NetDocuments**: www.netdocuments.com - extremely sophisticated and well established document management application.

2. **SharePoint**: http://tinyurl.com/b57xjhs - SharePoint is an online collaboration tool developed by Microsoft. It is often used as a content management system for Intranets. SharePoint allows teams within an organization to share information anywhere there is Web access. With SharePoint, users can set up websites to share documents, manage

projects and publish information. SharePoint also has many social media capabilities, such as blogs, wikis, microblogging and discussion boards.[15]

3. **Box Document Management**: see www.box.com/business/document-management/

4. **Javek**: www.javek.com

5. **Agilewords**: www.agilewords.com - specializes in collaborative document review

6. **DocumentTree**: www.documentree.com

J. Document Assembly/Automation:

1. **HotDocs Document Services**: www.hotdocs.com/products/document-services

2. **ContractExpress**: www.business-integrity.com

3. **Exari**: www.exari.com

4. **ProDoc**: www.prodoc.com

K. Secure File Sharing and Data Rooms:

1. **ShareFile by Citrix**: https://www.sharefile.com/ - This is a fantastic service that allows you to create virtual "rooms" for others and share documents with them securely. You decide what rights each user has to the collection of documents.

2. **Merrill DataSite Virtual Data Room**: See http://tinyurl.com/laam53o.

3. **Firmex Virtual Data Room**: See https://www.firmex.com/.

4. **SmartRoom Virtual Data Room**: See http://smartroom.com/.

5. **Ansarada Virtual Data Room**: See https://www.ansarada.com/

6. **IntraLinks Virtual Data Room**: See http://preview.tinyurl.com/lt6d899.

7. **Microsoft Office 365 or OneDrive for Business**: OneDrive is Microsoft's cloud storage offering and it comes with nearly every Office 365 plan. For

[15] *What is SharePoint?* by Ryan Goodrich, TechNewsDaily, January 30, 2013, see http://tinyurl.com/co8zcyc

only $5/user/month (Business Essentials plan), you get 1 TB of online storage. See this: http://tinyurl.com/h9mdn2v

8. **G Suite by Google Cloud**: The Basic edition is $5/user/month and includes 30 GB of cloud storage; the Business edition is $10/user/month and includes unlimited cloud storage. See your options here: http://tinyurl.com/kkocuto

9. **Dropbox Business Standard or Advanced**: Standard is $12.50/user/month and Advanced is $20/user/month. For an explanation of their business plans, see https://www.dropbox.com/business/plans-comparison.

10. **SpiderOak Professional**: See this for more: https://spideroak.com/business_pricing/

11. **Syncplicity**: See https://www.syncplicity.com/.

12. **Box.com**: https://www.box.com/pricing

13. **TrueShare**: http://www.trueshare.com/

14. **FileGenius**: http://www.filegenius.com/

15. **OneHub**: Secure file sharing - see https://onehub.com.

L. Encryption Options for Online Sync Programs Like Dropbox:

1. **BoxCryptor**: See www.boxcryptor.com

2. **Sookasa**: See www.sookasa.com

M. Anti-Spam and Email Security: Google Message Security Powered By Postini is **anti-spam** software that actually screens your email before it gets to you. It also removes viruses from email. Best of all, it actually works and is uncannily good at keeping the junk out of your inbox. Unfortunately, Google has stopped selling Postini service as a stand-alone application and now makes it available only through Google G Suite. If you have Microsoft Exchange or Lotus Notes, you can still use Postini even though it's a part of Google G Suite. The only drawback is that stand-alone Postini used to be $2/user/month and now as part of Google G Suite, it's $5/user/month. Not a big deal really, AND you get all of the other Google G Suite benefits .

N. Project Management:

1. **Basecamp**: www.basecamphq.com

2. **Teambox**: www.teambox.com

3. **Projecturf**: www.projecturf.com

4. **Apollo**: www.apollohq.com

5. **Teamwork PM**: www.teamworkpm.net

6. **Huddle**: www.huddle.com

7. **GlassCubes**: www.glasscubes.com

8. **GoPlan**: www.goplanapp.com

9. **Lighthouse**: www.lighthouseapp.com

10. **PBWorks**: www.pbworks.com

11. **Zoho Projects**: www.zoho.com/projects

O. **Task Management**:

1. **Evernote** - www.evernote.com - designed for note taking and task lists.

2. **Wunderlist** - www.wunderlist.com - my favorite but soon to be replaced by https://todo.microsoft.com/en-us/ (Microsoft purchased Wunderlist)

3. **Remember The Milk** - www.rememberthemilk.com

P. **Remote Access Services**: These services allow you to "take over" another computer via the internet.

1. **LogMeIn**: www.logmein.com - this is the least expensive option at $69.95/year.

2. **Gotomypc.com**: www.gotomypc.com. Take over any other PC via the Internet. Unlimited remote access to your PCs from any other Internet-connected computer; ability to swap host PCs at will; unlimited software and service upgrades; unlimited technical support and maintenance. Absolutely amazing service which we highly recommend.

3. **TeamViewer**: www.teamviewer.com - there is a free and a pay option for this.

Q. Backup Services:

1. **Mozy Pro**: http://mozy.com/pro - $3.95 + $0.50/GB per month. Therefore, to backup 40 GB of data would only cost $23.95 per month.

2. **Mozy Home**: htty://mozy.com/home - $4.95 per month - unlimited storage.

3. **Carbonite**: www.carbonite.com - $54.95/year - unlimited storage.

4. **iBackup**: www.ibackup.com - at the time of this writing, 100 GB is $9.95/month or $99.50 per year paid in advance.

5. **SOS Online Backup**: www.sosonlinebackup.com - pricing determined by how much data you intend to backup. 40 GB is $72/month or $720/year ($60/month if paid in advance). Highly rated service.

R. Web Conferencing Services:

1. **Join.Me**: http://join.me

2. **GoToMeeting**: www.gotomeeting.com

3. **WebEx Meetings**: www.webex.com

4. **Adobe Connect Meetings**: http://tinyurl.com/y8877ncu

5. **Skype for Business**: http://tinyurl.com/zc9weyy

6. **Zoom**: https://zoom.us/

7. **ClickMeeting**: https://clickmeeting.com/

S. E-Discovery & Litigation Support:

1. **Verve** by Kroll Ontrack: (www.krollontrack.com/e-discovery-software)

2. **NextPoint**: (http://www.nextpoint.com)

3. **Relativity** by kCura (http://kcura.com/relativity)

4. **Lexbe Online** (www.lexbe.com) is a web-based litigation document management and review tool. Lexbe e-Discovery is an Electronic Discovery service which enables you to quickly, accurately and cost-efficiently convert email, office and other electronic stored information (ESI) for legal review and delivery of discovery productions.

T. Microsoft Exchange:

1. **What Is Microsoft Exchange**: Microsoft Exchange is a program that must run on a Windows server and allows Outlook users to warehouse their data (email, contacts, calendars, tasks, etc.) on the server as a backup. Here are the benefits:

    a. **Share Data**: Exchange also allows users to share information in Outlook. For example, I could allow someone else in my office to access my calendar electronically and add appointments.

    b. **Anywhere Email Access**: Exchange also allows users to gain access to office email while out of the office in many different devices. For example, I can see my inbox, calendar & contacts on my iPad (or any tablet), on any Windows or Mac computer connected to the Internet, or on my smartphone. I can use Outlook Web Access (which comes with hosted Exchange) via a browser; or I can run Outlook natively on my laptop (for example) and as long as I'm connected to the Internet, I'm also connected to Exchange.

    c. **Full Backup**: Everything in Outlook is backed up in Exchange (email, contacts, calendar & tasks).

    d. **Smartphone Sync**: Exchange will wirelessly sync with any smartphone running Android, iOS, or Blackberry OS.

2. **Exchange Options**:

    a. **Get Your Own Server**: Of course, you would also need to have Exchange running on that server.

    b. **Hosted Exchange**: This is essentially renting Exchange on a server you access through the Internet. It is exactly the same as having it in-house except for the fact that you avoid the expense of buying and maintaining a file server, Windows and Exchange. In other words, rather than paying $8,000 + ongoing maintenance, you're paying $10/month/user. Depending on the size of your office and physical setup of remote offices or telecommuters, hosted Exchange Server is often much less expensive than having Exchange Server on-site. Other benefits of hosted Exchange Server: multiple internet connections, multiple power sources, guaranteed uptime, no cost for backup or maintenance.

3. **Options for Hosted Exchange**: There are hundreds but here are a few:

    a. Microsoft Office 365

b. www.godaddy.com

c. www.1and1.com

d. www.mailstreet.com

e. www.apptix.com

f. www.exchangemymail.com

g. www.appriver.com

U. **Microsoft Office 365**: Before I talk about functionality, we first need to define a few things to make sure we're on the same page.

1. **Microsoft Office 365**: I'll let Microsoft describe this for you:

> "Office 365" refers to subscription plans that include access to Office applications plus other productivity services that are enabled over the Internet (cloud services). Office 365 includes plans for use at home and for business. Learn about Office 365 for use at home. Office 365 plans for business include services such as Skype for Business web conferencing and Exchange Online hosted email for business, and additional online storage with OneDrive for Business.
>
> Many Office 365 plans also include the desktop version of the latest Office applications, which users can install across multiple computers and devices. The fully installed applications include: Word, Excel, PowerPoint, OneNote, Outlook, Publisher, and Access. (Publisher and Access are available on PC only.) And you can install them across multiple devices, including PCs, Macs, Android tablets, Android phones, iPad, and iPhone. When you have an active Office 365 subscription that includes the desktop version of Office, you always have the most up-to-date version of the applications.[16]

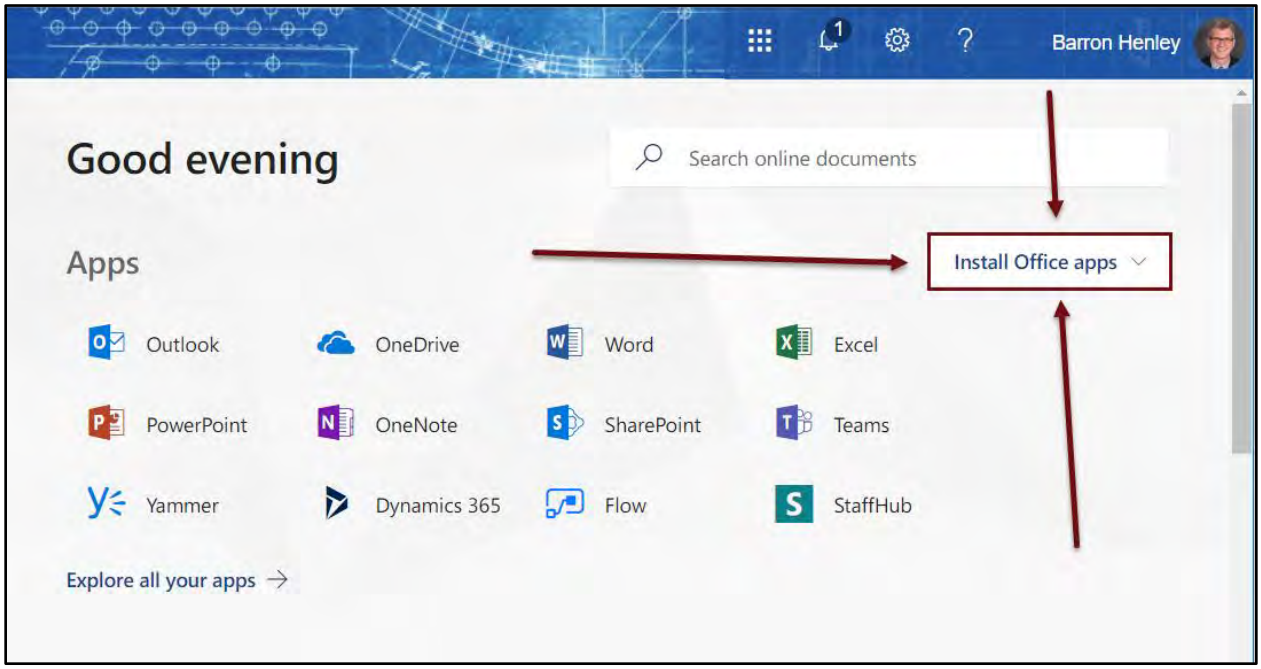
2. **Microsoft Office**: "Microsoft Office" is the name we still use for our familiar productivity software. Office suites are available as a one-time purchase and include applications such as Word, Excel, and PowerPoint, which can be installed on only one PC or Mac. The applications are not automatically updated; to get the latest version, you can purchase the product again when the new version becomes available. The latest versions currently

[16] See Office 365 for Business FAQ - http://tinyurl.com/k3r2tx5

available for one-time purchase are Office 2019 for Windows and Office 2019 for Mac. These suites are essentially a snapshot in time of Office via Office 365 and do not come with any of the cloud-based services included in Office 365.[17]

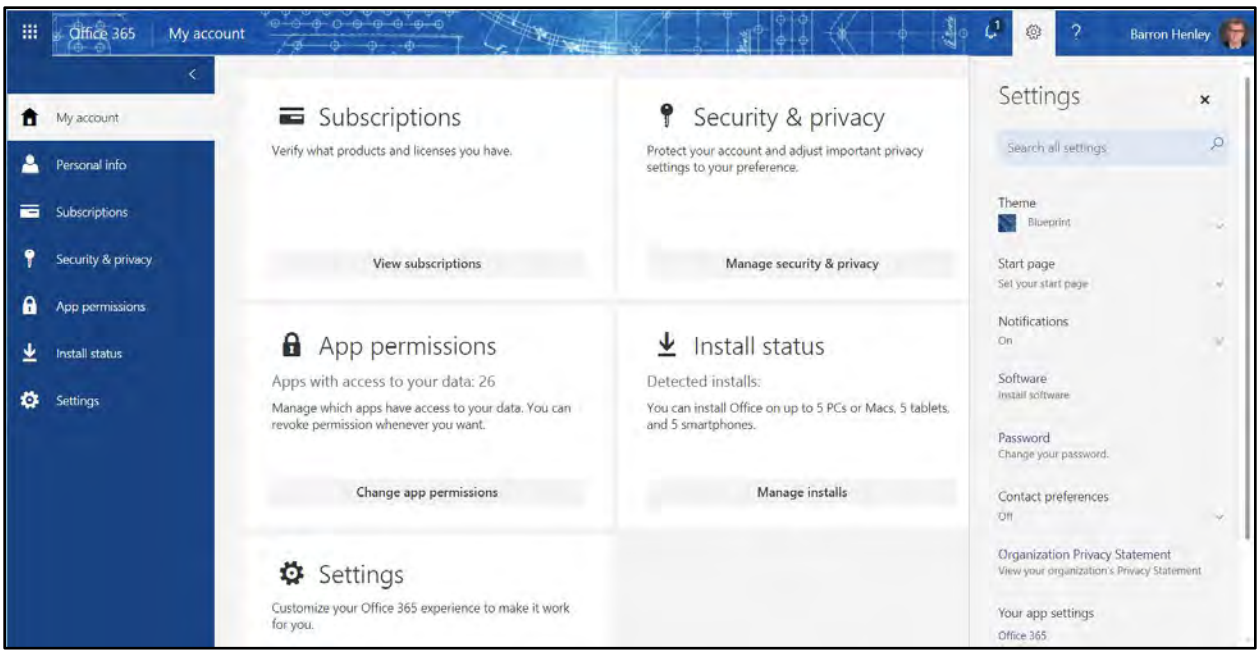
3. **Office Online**: There are web versions of Word, Excel, etc., that you can use whether or not you have an Office 365 account. They don't have all of the functionality of the desktop versions, but you can do a lot with them. See http://tinyurl.com/pbl63mu for more information.

4. **Office 365 Running Offline**: You can use Office 365 offline (without internet access) if you download and install the desktop version of Office with your plan. You have to connect to the internet every 30 days to maintain your subscription and Office 365 tells you when it's time to connect. To install the desktop versions of the software by clicking the Install Office apps button from the main Office 365 screen (see below):



5. **Office 365 Administrative Functions**: As you can see from the screen shot below, the layout is logical and easy to understand.

[17] See Office 365 for Business FAQ - http://tinyurl.com/k3r2tx5



6. **Delve**: Office Delve is a cloud-based service powered by Office Graph, which helps users find and discover pertinent information across integrated Microsoft products by pulling user content from Microsoft Exchange, OneDrive for Business, SharePoint 2019 and Yammer. In addition to traditional search tools, Delve has a discover function, which brings potentially relevant information to the attention of users, based on relationships and the past activity of other users within the same organization. It is important to note that Delve never presents users with content they don't have permission to view.

   Delve, which became available to Office 365 subscribers in March 2015, is also a collaboration tool that helps users find colleagues through profiles, and it allows them to create, edit and share documents, PowerPoint presentations and more with other users. It works similarly to Microsoft Sway in that it also allows users to embed documents, videos and images.[18]

7. **Flow**: Microsoft Flow is a cloud-based service that makes it practical and simple for line-of-business users to build workflows that automate time-consuming business tasks and processes across applications and services.[19]

8. **Forms**: According to Microsoft, "[w]ith Microsoft Forms, you can create surveys, quizzes, and polls, and easily see results as they come in. When you create a quiz or form, you can invite others to respond to it using any web browser, even on mobile devices. As results are submitted, you can

[18] See http://searchcontentmanagement.techtarget.com/definition/Microsoft-Delve

[19] See https://flow.microsoft.com/en-us/documentation/frequently-asked-questions/

use built-in analytics to evaluate responses. Form data, such as quiz results, can be easily exported to Excel for additional analysis or grading."[20]

9. **OneDrive**: According to Microsoft, "Securely store and share files from anywhere. OneDrive offers native desktop, browser and mobile experiences on your devices. Access and make changes that sync automatically in the cloud or sync local copies of files for offline viewing and editing on your PC or Mac. Confidently share your files so other people can access them seamlessly and securely."[21]

10. **OneNote**: "Designed to function as an electronic version of a paper notebook, Microsoft OneNote is a note-taking and personal information management (PIM) application for collecting, organizing and sharing digital information. By storing text notes, photos, audio and video snippets, handwriting and similar content, Microsoft OneNote collects and organizes the information, making it available for searching as well as sharing with others."[22] This application is also free regardless of whether you subscribe to Office 365.

11. **Planner**: Take the chaos out of teamwork and get more done! Planner makes it easy for your team to create new plans, organize and assign tasks, share files, chat about what you're working on, and get updates on progress.

    a. **Easy to use**: Launch Planner from the Office 365 app launcher with a single click. You can then create a new plan, build a team, assign tasks, and update status—in a few easy steps.

    b. **Organize work visually**: Each plan has its own board, where you can organize tasks into buckets. You can categorize tasks based on their status or on whom they're assigned to. To update the status or change assignments, just drag and drop tasks between columns.

    c. **Visibility and transparency**: The My Tasks view provides a comprehensive list of all your tasks and their status across all your plans. When working together on a plan, team members always know who is working on what.

    d. **Collaborate around tasks**: Built for Office 365, Planner lets you attach files to tasks, work together on those files, and even have conversations around tasks without switching between apps. With

[20] See https://support.office.com/en-us/forms

[21] See http://bit.ly/2qT1bFS

[22] See https://www.webopedia.com/TERM/M/microsoft_onenote.html

Planner, all your team's discussions and deliverables stay with the plan and don't get locked away across disparate applications.

e. **Works across devices**: Planner works across all your devices. And with Planner, everyone is always on the same page. A glance at Charts is all it takes to know where things stand and if the team is making enough progress towards their goal.

f. **Email notifications**: With Planner, you'll never miss a beat! Receive email notifications whenever you're assigned a new task or added to a conversation.[23]

12. **SharePoint**: "SharePoint is Microsoft's premier collaborative server environment, providing tools for sharing documents and data across various organizations within a company's network. Typically deployed on a company's network as a series of intranet sites, SharePoint lets various departments control their own security, workgroups, documents, and data.

As with any other website, a SharePoint site — or an individual page within the site — is accessible by way of a URL that the user can access using a standard web browser.

SharePoint is most often used for the storing of version-controlled documents, such as Word documents and Excel worksheets. In many environments, email is used for passing documents back and forth between users. The potential for mixing up different versions of the same document is considerable. Also, storing multiple copies of the same document takes up a lot of disk space. Because SharePoint provides a single source for storing, viewing, and updating documents, many of these issues are eliminated.

And because SharePoint easily handles virtually any type of document, it is frequently used to consolidate and store various types of documentation (project drawings, videos, schematics, photographs, and workbooks, for example) that are required for large projects where multiple teams must collaborate."[24]

13. **StaffHub**: "Microsoft StaffHub is a cloud-based platform designed for employees whose job requires them to be on their feet or on the go. Examples include baristas, hair stylists, waiters, bus drivers, and so on. StaffHub helps you create and manage work shifts, share files, and

[23] See https://products.office.com/en-us/business/task-management-software

[24] What Is SharePoint? by Michael Alexander, see http://bit.ly/2qUDiO0

communicate important information with team members. It's available to Office 365 for business subscribers and comes with a web app for managers and mobile app for employees. The mobile app supports both iOS and Android."[25]

14. **Stream**: "Microsoft Stream is a cloud video service that provides a secure and easy way for employees at organizations of all sizes to upload, watch, share, organize and discover all videos within their organization from a single portal."[26]

15. **Sway**: According to Microsoft: Sway makes it quick and easy to create and share polished, interactive reports, presentations, personal stories, and more. Add your content, and we'll do the rest. Bring your Sway to life with interactive content. Include a video to talk about your idea or add an interactive chart to let others dive into the details. Sway suggests searches to help you find relevant images, videos, tweets, and other content that you can drag and drop right into your creation. No need to juggle apps and web pages to find what you want. You don't need to worry about formatting, Sway's built-in design engine takes care of it. If the first design isn't right for you, Remix! it to see others or customize it to make it your own. It's super easy to share a Sway. Family, friends, classmates, and coworkers can see your creation on the web without signing up or downloading additional software. And you can change privacy settings for more control.[27]

16. **Teams**: This description is from TechTarget: Launched in beta in November 2016, Microsoft Teams is a chat-based collaboration tool that is part of the Office 365 suite of services. Teams enables remote, global and dispersed teams to work together and collaborate through a common workspace, team chat, one-on-one chat, document collaboration and more. Teams is integrated with a variety of other Office 365 services, including SharePoint, Skype, Yammer and Exchange.

    Teams offers three clusters of functionality and is poised to compete with services like Slack, Jive, HipChat, Salesforce Chatter and others. It touts itself as a native chat tool for Microsoft shops using other Office 365 services. While the core of the tool is real-time chat among teams, Teams enables other core collaboration platform functions by using APIs to

[25] See http://bit.ly/2HLT3jY

[26] See http://bit.ly/2qStZOC

[27] See https://sway.com/

integrate document management, video and other applications. Teams includes the following core capabilities:

a. **Chat**. While conversations are visible to the entire team, they can also be made private. Skype video is deeply integrated into the application, and team members can add emojis and custom memes to discussions.

b. **Hub**. Microsoft Teams provides a consolidated space for various Office applications, including Word, Excel, PowerPoint, SharePoint, OneNote, Planner, Power BI and Delve. It enables teams to work natively and collaboratively, without having to toggle between applications as they collaborate.

c. **Easy customization of teams**. The tool features APIs that plug into various cloud-based documents and cloud services. Microsoft Teams utilizes the same Connector model as Exchange, which enables notifications and updates from Twitter and other third-party applications.[28]

17. **To-Do**: This is a fantastic task management application that is actually free regardless of whether you have an Office 365 subscription.

18. **Video**: Upload, share and play videos in your organization. Note that is not for sharing videos for people who are not on your Office 365 account.

19. **Yammer**: Here's an explanation from PCWorld.com. I am friends with a few lawyers whose firms use this and it received high praise from them.

a. **A Social Network for Your Business**: Yammer is essentially a social network that's entirely focused on your business. In order to join your business's Yammer network, an applicant must have a working email address from your company's domain. You can also create external networks to allow non-employees, such as suppliers and customers, to communicate with your company.

b. **The Ticker**: The similarity between the Yammer and Facebook user interfaces is surely no accident. As with Facebook, new posts—complete with Likes—appear in Yammer's primary screen, which is known as the Newsfeed. Icons indicating private messages and other notifications appear in the upper left-hand corner. You can also create groups, which is helpful for segregating talk that's relevant only to specific internal teams. If a group conversation

[28] See http://searchcontentmanagement.techtarget.com/definition/Microsoft-Teams

takes a turn that requires assistance from other employees, you can share it with a specific person via instant message or with another group entirely. Sharing a post with specific groups is a breeze thanks to handy-dandy drop-down menus below the Update box (which is similar to Facebook's Status box).

c. **Hashtags**: The overuse of hashtags on Twitter can make your eyes bleed, but they're very useful on Yammer. Yammer's robust search function digs up hashtagged posts lickity-split, so be sure to slap a #2013projections or #KeyCorporateAccount hashtag on the end of your posts for future search posterity. @mentions are also supported.

d. **Contact Coworkers**: You can create external networks and invite non-employees (suppliers and clients, for instance) to join them. The People Directory automatically creates a searchable database of every person enrolled in your Yammer, making it especially easy to find contact information for the people in your company. Even better, profiles have Skills listings that are also searchable in the People Directory. You'll never have to scramble to find the right person for the job again.

e. **Sharing Files**: Anyone can attach a file to a post to quickly share information without forcing recipients to slog through clogged inboxes. You can also upload files—including images and videos—to a file repository, where other Yammerers can download and update them. Groups have their own separate file repositories that augment the main one, and employees can receive automatic notifications whenever critical files are updated.

f. **Collaborating**: In addition to the previously mentioned file repositories, teams can also collaboratively create Pages (Pages are essentially documents) in a group setting. Admins have the ability to lock down Pages (and all other files) as official or read-only.

g. **Mobile Platforms**: Yammer has apps for iOS, Android, BlackBerry, and—of course—Windows Phone.

h. **Less Email**: Yammer claims that companies using Yammer generate about 40 percent less email.[29]

[29] What the Heck Is Yammer? by Brad Chacos, PCWorld, Aug 7, 2012. See http://tinyurl.com/8plp6xs.

V. **Google G Suite Business**: If you are on a limited budget, Google G Suite Business costs only $120/user/year and provides:

1. Business email through Gmail
2. Video and voice conferencing
3. Shared calendars
4. Documents, spreadsheets, and presentations
5. 24/7 support by phone, email, and online
6. Security and administration controls
7. Unlimited cloud storage (or 1TB per user if fewer than 5 users)
8. Smart search across G Suite with Cloud Search
9. Archive and set retention policies for emails and chats
10. eDiscovery for emails, chats, and files
11. Audit reports to track user activity

W. **Instant Messaging for Lawyers**:

1. **What It Is**: Typically abbreviated as IM, this is a type of communications service that enables you to create a kind of private chat room with another individual in order to communicate in real time over the Internet. It's analogous to a telephone conversation but using text-based, not voice-based, communication. Typically, the instant messaging system alerts you whenever somebody on your private list is online. You can then initiate a chat session with that particular individual. IM systems often also include video (users can see each other via webcam), file-sharing/transfer capabilities, and phone (users can talk to each other using microphones connected to or built into their computers).

2. **Why IM Is A Valuable Communication Tool**: When you and your colleagues are spread out geographically, this can be invaluable (and it's typically free). For example, someone in one office might need a quick answer from someone in another office. It's often difficult to reach someone on the phone and email queries are easily lost among the torrent of daily incoming email that each person has to deal with. This is when instant messaging is the perfect solution. With one click, the individual who needs an answer can determine if the person they need to

communicate with is online and available. If that person is available, the asking individual can pop his/her question up on the computer screen of the person who can answer it. As long as the recipient can type (even if they're on the phone), they can quickly reply without interrupting what they are already doing. No phone call or email is necessary. One of our clients who started using IM commented:

> "This is also critical when working with support staff who are working through issues on a phone call with an external party. By having access to the supervising attorney in real time, issues can be resolved immediately, rather than through several follow up calls or emails as questions go back and forth. I often use a paralegal in another office for litigation support and this has assisted me in working seamlessly with her, despite the fact that she is 45 miles away."[30]

X. **Phone Answering**: This isn't really a "cloud" service, but it *is* virtual. Some prefer an auto-attendant and some prefer a live human to answer their phones. Here are some options for phone answering services where real people will answer your phone:

1. **Ruby**: See www.callruby.com. This service is typically rated #1 in the reviews I read on these things.

2. **Instant Answering Service**: See http://tinyurl.com/cf38bvx. This is a general answering service that has a sub-specialty of law firms.

3. **Attorney Answering Services**: Alert Communications provides this service - see www.attorneyansweringservices.com.

4. **Map Communications**: See http://tinyurl.com/83qybcj.

5. **Hosted Receptionist**: See http://tinyurl.com/8yw4h99.

6. **Grasshopper**: See www.grasshopper.com. This service is interesting because you get all of the benefits of a VoIP phone system and call management without buying any phones (it works with whatever phones you already have).

7. **VoIP Providers**: Just about every VoIP provider offers some kind of call management feature.

[30] Erin Stewart, attorney in the office for the General Counsel of the University of North Texas

Y. **Internet Faxing Services**:

1. **RingCentral**: www.ringcentral.com. With RingCentral, you get a toll free or local number; you can receive faxes on your PC, via email or with a mobile app; and you can send faxes via email or your PC from any application.

2. **Myfax**: www.myfax.com - pricing shown below. Toll free number and faxes are emailed as PDFs attached to email.

3. **EFax**: www.efax.com - This is a more expensive option.

4. **GreenFax**: www.greenfax.com

5. **MetroFax**: www.metrofax.com.

6. **Onebox**: www.onebox.com

7. **faxZERO**: $1.99 per fax

Z. **Rent A Server**: If you need a server, you certainly don't have to buy one. Now there are many companies from which you can rent a server which you access via the Internet. You can send them your programs and data and they'll set it up for you on one of their servers. Most of these companies also provide 24x7 technical support and data backup. Your applications are "streamed" to you so that you can use any computer, tablet or phone connected to the Internet to access your programs and data. The remote access associated with this is pretty amazing. Since these companies have their servers in data centers, the possibility that you'll lose access to your programs and data due to Internet or power outages is extremely remote. A few companies to consider:

1. **ProCirrus** - www.ProCirrus.com (our favorite)

2. **MindShif**t - www.MindShift.com

3. **RackSpace** - www.RackSpace.com

AA. **Sharing Files Without A Server**: If you just want to share files (word processor documents, PDFs, etc.) with others in your office, you don't need to buy a server and there are many ways to rent this capability. You have several solid, inexpensive options here.

1. **Microsoft Office 365 or OneDrive for Business**: OneDrive is Microsoft's cloud storage offering and it can be purchased as part of an Office 365 plan or separately. You get 25 GB for $2.50/user/month which is accessible from virtually any phone, tablet or computer, Windows or Apple. For the

OneDrive plans, see https://onedrive.live.com/about/en-us/plans/. I personally like this option the best.

2. **Google G Suite for Business**: This service is $5 to $10/user/month.

3. **Dropbox Business Standard & Advanced**: See the plans here: https://www.dropbox.com/business/pricing

4. **SpiderOak Professional**: This service offers complete encryption so thorough that not even SpiderOak employees can get to your data. For $10/user/month, you get 100 GB of storage. See this for more: https://spideroak.com/business_pricing/

5. **Syncplicity**: See www.syncplicity.com.

6. **Box.com**: www.box.com

7. **Sugar Sync**: See www.sugarsync.com. This service offers online backup of your files and file synchronization among multiple PCs and smartphones. You can access your files anywhere you have Internet access thanks to apps for BlackBerry, iPhone and Windows Mobile.

8. **ShareFile by Citrix**: www.sharefile.com - This is a fantastic service that allows you to create virtual "rooms" for others and share documents with them securely. You decide what rights each user has to the collection of documents. Simple and powerful.

9. **TrueShare**: www.trueshare.com - Similar to ShareFile, a little less expensive, a little more difficult to use.

10. **FileGenius**: www.filegenius.com - similar to TrueShare and ShareFile.

BB. Voice Over Internet Protocol (VoIP) Phone Systems:

1. **Explanation and Benefits of Hosted VoIP**: The following is from www.VoIP-Info.org which is the most succinct explanation I've come across:

> **Hosted VoIP**: Hosted VoIP is another term for Hosted PBX. "Hosted" means to say that the hardware and PBX is hosted at an off-site location from where the VoIP telephone service is being used. An office can have VoIP telephone service that powers their phones in the office, but their PBX could be hosted at their VoIP providers data center, thus the term: hosted VoIP.

Benefits of Hosted VoIP: There are many benefits to using Hosted VoIP rather than a traditional phone system, or an on-premise VoIP system. The main benefit is cost- a Hosted VoIP system costs much less to set-up than an on-premise PBX. In many cases, there are no set-up fees for a hosted VoIP system. Hosted VoIP phone systems fall under operational expenditure rather than capital expenditure, which also make hosted VoIP systems attractive to businesses.

Another benefit to a hosted VoIP system over an on-premise PBX is that hosted VoIP providers will take care of all the set-up and installation, meaning you do not need to be a telecom or VoIP expert in order to get hosted VoIP.[31]

2. **How VoIP Works**: VoIP phone systems simply need an Internet connection in order to work. As such, anywhere you have an Internet connection, you can be connected to your office phone system. You can make and receive calls; calls can be transferred to you and you can transfer them to others; and voice mails are emailed to you as sound files so you can receive and listen to them anywhere. The list of standard features on VoIP phone systems are so long, you'll be shocked. Further, they're inexpensive.

3. **Sample Budget**: Here's a quote for a completely mobile phone system one of our clients recently obtained from www.RingCentral.com:

    a. Recurring monthly fees for 3 users (unlimited calls):..... $83.97

    b. Phones & Hardware (one time fees)
        i. Receptionist Phone $159.00
        ii. User phones (2)..... $238.00
        iii. Shipping fees..... $18.98
        iv. Discount ..... ($90.00)
        v. Total one-time fees:..... $325.98

    This includes a fancy receptionist phone and two other hard phones which can be used anywhere as long as they're connected to the Internet. Total cost per month is only $83.97 and it doesn't change. Further, the foregoing service includes a **softphone service** which allows you to use your computer (Windows or Mac) or Android or iOS device as your office phone. It has an incredible array of features you can check out here: http://tinyurl.com/mub5xak

    Having helped several clients get service from RingCentral, if you want to contact them, I'd recommend going straight to the incredibly helpful

[31] See http://www.voip-info.org/wiki/view/Hosted+VoIP

person I worked with there. Her contact information is: Narissa Rocha @ 800.372.7765 x 0187 or narissar@ringcentral.com.

4. **VoIP Providers**: There are many other VoIP providers out there including the following:

   a. **RingCentral** - www.ringcentral.com

   b. **Vonage** - http://tinyurl.com/onf25yz

   c. **Proximiti** - www.proximiti.com

   d. **Vocalocity** - www.vocalocity.com

   e. **Jive** - www.getjive.com

   f. **8 x 8, Inc.** - www.get8x8.com

   g. **PBXtra** - http://pbxtra.fonality.com

   h. **Hover Networks** - www.hovernetworks.com

   i. **Easy Office Phone** - www.easyofficephone.com

   j. **AVAD Technologies** - www.avadtechnologies.com

CC. **On Demand Office Space**: If you don't want to pay for a full-time office, you can rent an executive office suite. If you are close to a metropolitan area, you probably have many choices with this. A good example is Regus (www.regus.com) which is a national company. For a small monthly fee, you can have access to an office, conference rooms, mail service, phone answering and a variety of other services. For example, I just conducted a Google search on "executive office suites, Columbus, Ohio" and found literally dozens of options. There is also a fantastic website which allows you to search by metropolitan area for executive office suite options - see http://us.instantoffices.com.

IX. SAVING MONEY ON BACK UP SYSTEMS:

A. **Don't Cut Corners Here**: This is not an area where you want to be cheap, but there are ways to protect yourself and not spend a lot of money.

B. **Backup Device/System Options**: We do NOT recommend that you rely solely on an Internet back up option. Instead, we recommend that your primary back up is on-site (either external hard drive(s) or network attached storage (see below)) and that you use an Internet option as a secondary backup. Here are a few suggestions:

1. **External Hard Drives**: There are external hard drives designed specifically as backup devices and this is our recommendation. They hold much more data than the REV drive described above (500 to 1,000 GB compared to 120 GB) and they are very inexpensive. The annoyance is that you have to unplug one of them and take it home with you every day (they need to be rotated so you always have one full backup offsite). Other than that, they're very fast and reliable. Look for at least 1 TB of storage and a 7,200 rpm drive. If your computer supports USB 3.0, Thunderbolt or FireWire, look for drives that will allow you to take advantage of the faster speeds those interfaces offer. There are many options.

2. **Network Attached Storage ("NAS")**: Without getting too technical, NAS is storage (usually an external hard drive) attached directly to your network rather than to an individual PC or server. The benefit is that all computers connected to the network can access the NAS regardless of which computers are on or off. Furthermore, higher-end NAS devices employ RAID (Redundant Array of Independent Disks). RAID is an configuration in which multiple hard drives are arranged so that data is stored across all of them simultaneously. Even though multiple drives are involved, your computer sees the RAID as a single drive letter on the network. RAID gives you better performance (surprisingly), capacity and reliability than a single large drive. There are a number of different "levels" of RAID, including RAID 1 (straight mirroring when two drives both containing the same data) and RAID 5 (Rotating Parity Array - all data is distributed across all drives and there are at least 3). For a good explanation of RAID and what the levels mean, see http://tinyurl.com/mmqrf. The main drawback of a NAS device is that you cannot really take it off-site. However, it can contain multiple backups of your data and if RAID is employed in the device, it's extremely unlikely that you'll have a simultaneous crash of all of the drives contained inside the NAS.

3. **Internet Backup Options**: This is becoming more and more common as a ***secondary*** backup method. Some use it as a primary backup but we recommend against this because internet connections frequently go down.

    - **Mozy Pro** - http://mozy.com/product/mozy/business
    - **Mozy Home** - http://mozy.com/product/mozy/personal
    - **CrashPlan** - https://www.code42.com/crashplan/
    - **Carbonite** - https://www.carbonite.com/en/cloud-backup/personal-solutions/personal-plans/buy/

- **SOS Online Backup** - https://www.sosonlinebackup.com/

No matter what you do, you must get a backup system. It is not optional. Losing all of your data can cripple your practice and cause you to commit malpractice. The risk is simply not worth it.

C. **Recommendation Regarding Backup Hardware and Software**: If you just want to make sure your laptop or desktop is getting backed up, it's hard to beat Carbonite's Personal Plus plan for $72/year. You could also buy an external hard drive and mirror your C:\ to the external hard drive using a program like Acronis True Image 2019 which is only $35.

X. PRINT, SCAN & FAX:

A. **Generally**: If you have the budget for it, you're better off buying a printer to print and a scanner to scan. However, if you need to save money, then a multifunction machine is a very economical option.

B. **Printer Recommendations**:

1. **InkJets Can Be Expensive**: Ink cartridges for inkjets can be pretty expensive compared to toner.

2. **On a Tight Budget, Consider a Multi-Function Machine**: If you're on a tight budget, then it's hard to beat a multifunction or "all-in-one" machine. These machines will typically copy, print, scan and fax. The main drawback is that they tend to break down if you put a high volume through them. Whatever you do, avoid HP multifunctions based upon our experiences and those of our clients. Brother, Dell and Canon make good options.

3. **Printing Considerations**:

   - Keep in mind that your lowest cost per page is always going to be network printers designed for higher volume (or copiers which are also network printers). The highest cost per page is always going to be personal printers (small, slower printers connected directly to a user's computer).

   - Unless you have a fleet of exactly the same type of printers, personal printers usually require you to keep several different toner cartridges in stock. This is annoying and expensive.

C. Scanner Recommendations:

1. **Recommended Flatbed Scanners**: Consider the Fujitsu fi-7260 and fi-7280 scanners for good flatbed options.

2. **Recommended Sheet-Fed Scanners**: We're big fans of the Fujitsu ScanSnap iX1500 (successor to the iX500), and the fi-7160 and fi-7180 models.

D. Faxing Recommendations: See paragraph VIII.Y. above.

E. PDF Manipulation Software Recommendations: If you don't want to spend big bucks on Adobe Acrobat, here are some legitimate and less expensive competitors. Furthermore, you might be able to get Adobe Acrobat bundled with MS Office on a new computer or included with a new scanner.

1. **Nuance Power PDF Advanced**: $170 - see http://tinyurl.com/mseh79d

2. **Foxit PhantomPDF for Business**: Very strong feature match with Acrobat Pro for $160.

3. **Nitro Professional**: Most of the features present in Acrobat Standard for only $160.

XI. WORD PROCESSING:

A. Note Regarding Purchasing: It is almost always cheaper to have your office suite included with a new PC than it is to buy it after the fact. If you can't get your office suite included with the new PC you're considering, then buy your new PC somewhere that offers it.

B. Inexpensive Options:

1. **Microsoft Office 365**: Microsoft offers subscriptions for the desktop versions of MS Office. See paragraph VIII.U. on page 31 for more information.

2. **Apache OpenOffice** (see www.openoffice.org) - FREE!! - Includes the following: WRITER is OpenOffice.org's word processor: use it for anything from writing a quick letter to producing an entire book with embedded illustrations, cross-references, tables of contents, indexes, bibliographies... Auto-complete, auto-format, and real-time spelling check make light work of the hardest task. Writer is powerful enough to tackle desktop publishing tasks such as creating multi-column newsletters, brochures – the only limit is your imagination. Use CALC to bring your numbers under control. This powerful spreadsheet has all the tools you need to calculate, analyze,

summarize, and present your data in numerical reports or sizzling graphics. A fully-integrated help system makes entering complex formulas a breeze. Sophisticated decision-making tools are just a few mouse clicks away. Pull in external data using the Data Pilot, and sort it, filter it, and produce subtotals and statistical analyses. Use previews to select from thirteen categories of 2-D and 3-D charts including line, area, column, pie, XY, stock and net with dozens of variants. IMPRESS is the fastest, most powerful way to create effective multimedia presentations. Your presentations will truly stand out with special effects, animation and high-impact drawing tools. DRAW will produce everything from simple diagrams to dynamic 3D illustrations and special effects. New to Version 2, BASE enables you to manipulate database data seamlessly within OpenOffice.org. Create and modify tables, forms, queries, and reports, either using your own database or Base's own built-in HSQL database engine.

3. **Google Docs** (http://docs.google.com) - free online word processor, spreadsheet & presentations.

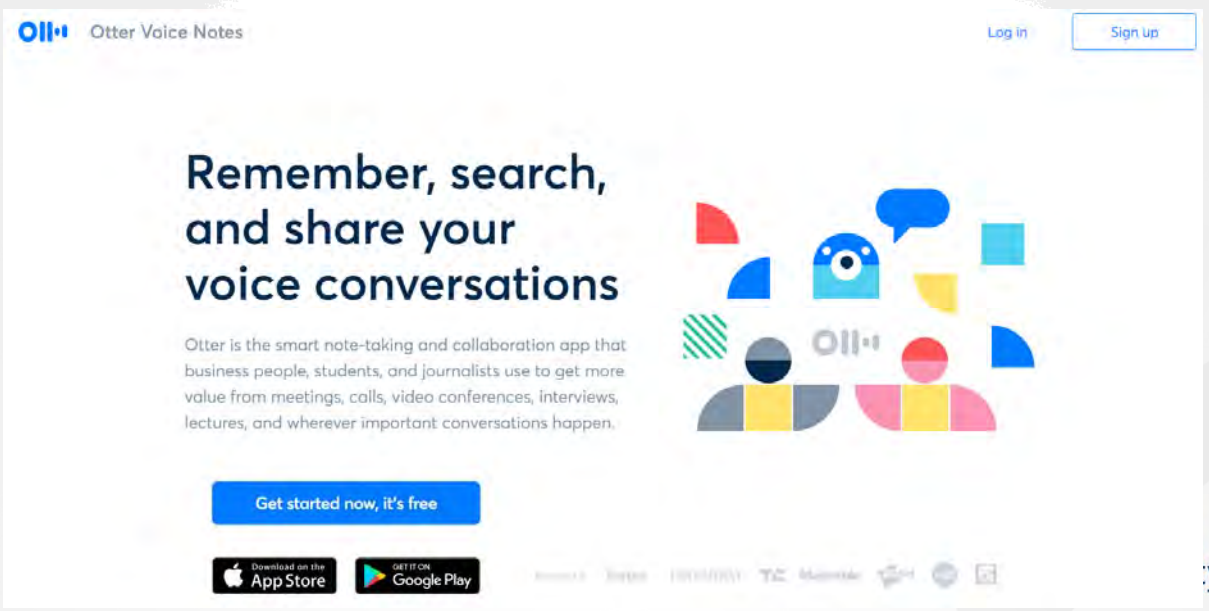
4. **Zoho Writer** (http://writer.zoho.com) - free online word processor which I personally feel is even better than Google Docs.

XII. **REMOTE ACCESS**: There are many, many options for accessing the office computer systems or network remotely and this is extremely important for lawyers on the go. We'll focus on the particularly cost effective methods here. We haven't included this in our budget because remote access isn't mission critical. However, it is wonderful to be able to access your office computer from home or anywhere else. Consider **LogMeIn.com** which is only $250/year for up to 2 computers. If you need to be able to access a computer at your office when you're on the road, this is the best free option out there. It gives you the ability to easily control the mouse and keyboard of any remote PC. You can open remote files, check your email, run programs, run system diagnostics, access from any browser, access from wireless Pocket PC and it's all easy to use. Another to consider is Team Viewer (https://www.teamviewer.com/en/) which is free for friends & family. Real VPN (https://www.realvnc.com/en/) is also a great option that is free for personal use and only $40/year for business use.

The Best Legal Tech Tips, Tricks, Gadgets & Websites

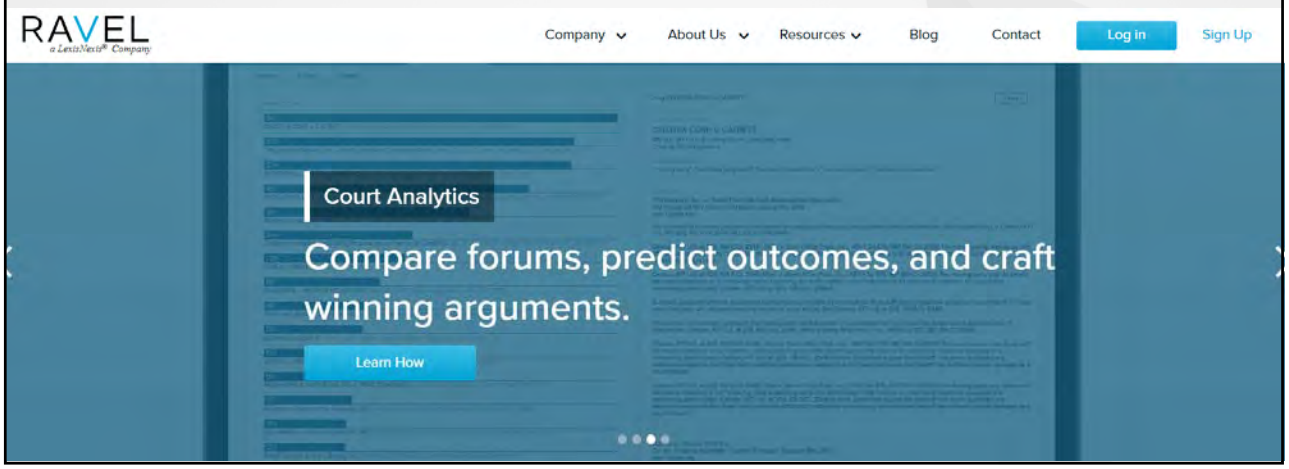
Barron K. Henley, Esq. • bhenley@affinityconsulting.com
Affinity Consulting Group

https://otter.ai (free or $10/mo)



https://home.ravellaw.com/

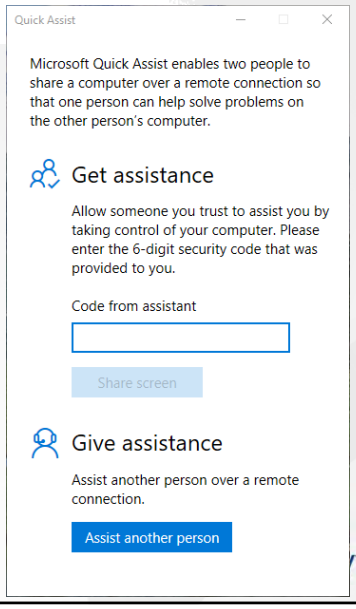
Get insights into how judges have ruled on previous cases, including their track record and patterns



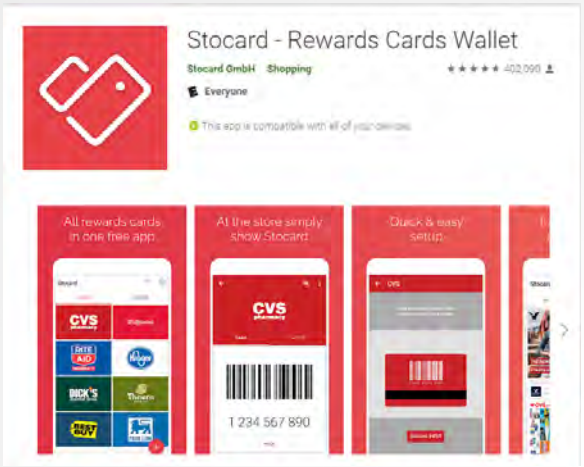
Windows 10 Quick Assist

Start button > Windows Accessories > Quick Assist

Provide or receive assistance



Apps for Store Loyalty Cards



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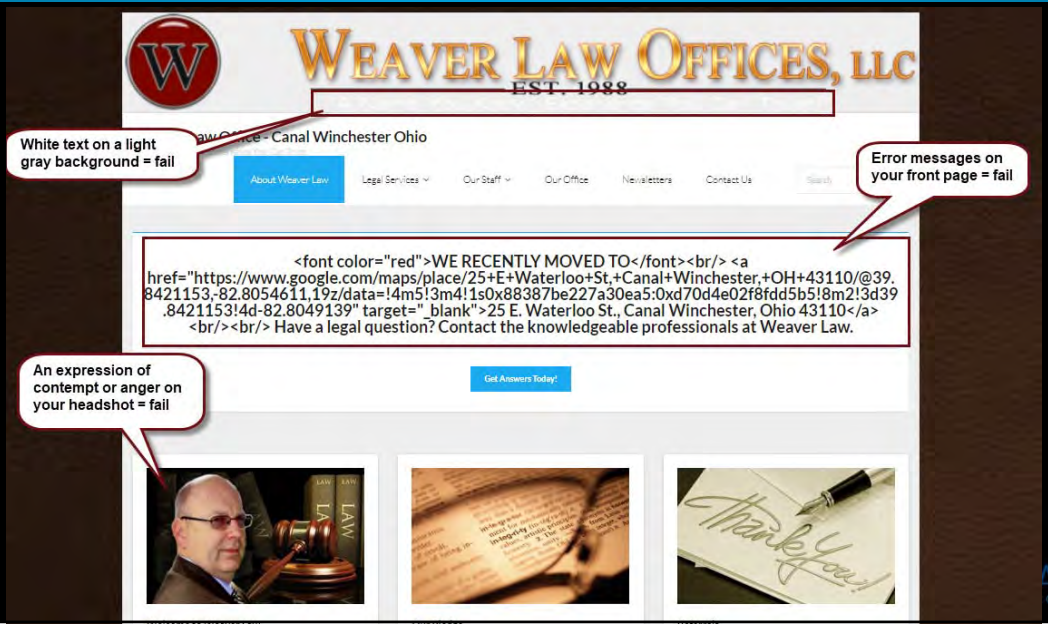
Websites Matter – Don't DIY



Affinity CONSULTING

Transcript Pad

TRANSCRIPTPAD

TranscriptPad is an easy-to-use iPad app to **review**, **search**, **issue code**, and **summarize transcripts**

Affinity CONSULTING

TrialPad

TRIALPAD

TrialPad is an easy-to-use iPad app to **organize**, **annotate**, and **present evidence**

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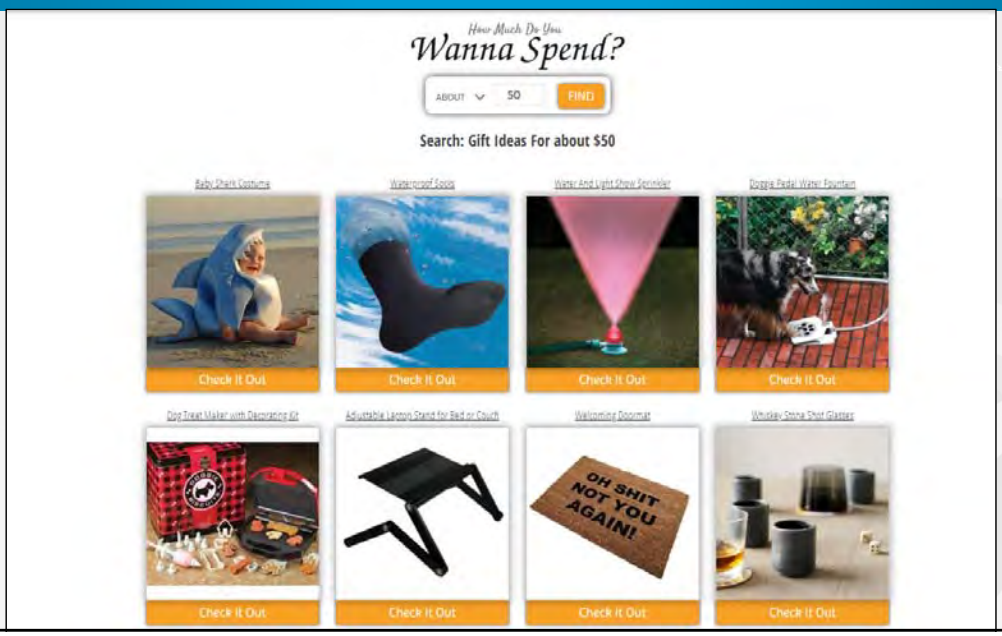
The Holidays Approach – www.wannaspend.com

x



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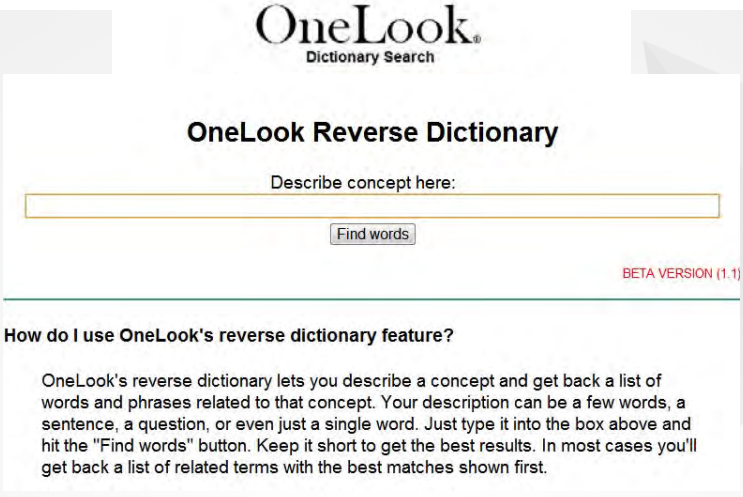
Best Web Dictionary (includes legal & medical)

x



Affinity CONSULTING

Can You Multi-Task?

Research is pretty clear on this: (you can't)

- **We can focus on 1 or 2 things at a time**
- **"Super taskers" are rare (2% of population)**
- **If you think you can multi-task, see**
  - **http://tinyurl.com/ph3e5w2 x or**
  - **http://tinyurl.com/od8yctq x**

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Penalties of Multitasking

"Research demonstrates that when someone multi-tasks, **work actually takes longer and the quality is inferior**. A 2005 study by Hewlett-Packard found that workers who were continually distracted by e-mail and phone calls showed **an effective drop in IQ equal to twice that of those using marijuana**."

- The Myth of Multi-Tasking by Rich Largman

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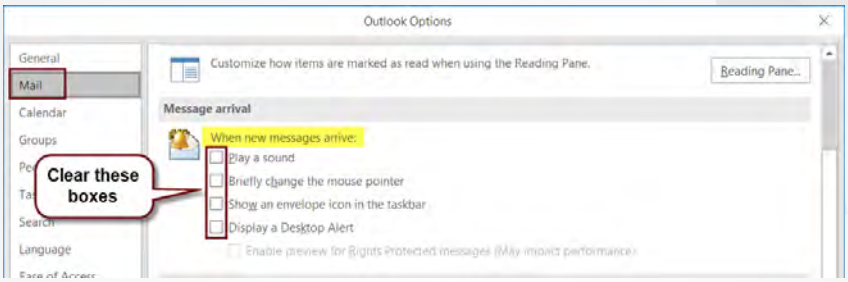
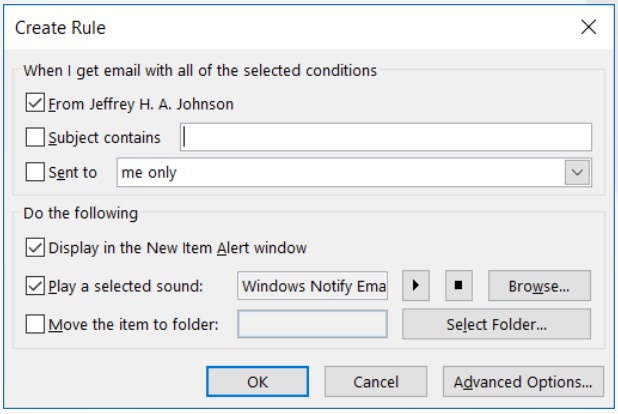
What To Do About Multitasking

Eliminate the temptation:
Turn Off Email Notifications
(File menu > Options > Mail)



Create Rules for Exceptions

Right-click an email > rules > create rule



Old-School Timers

- $19 on amazon

Encrypted File Sharing Options

tresorit — Fully encrypted – no shared encryption keys

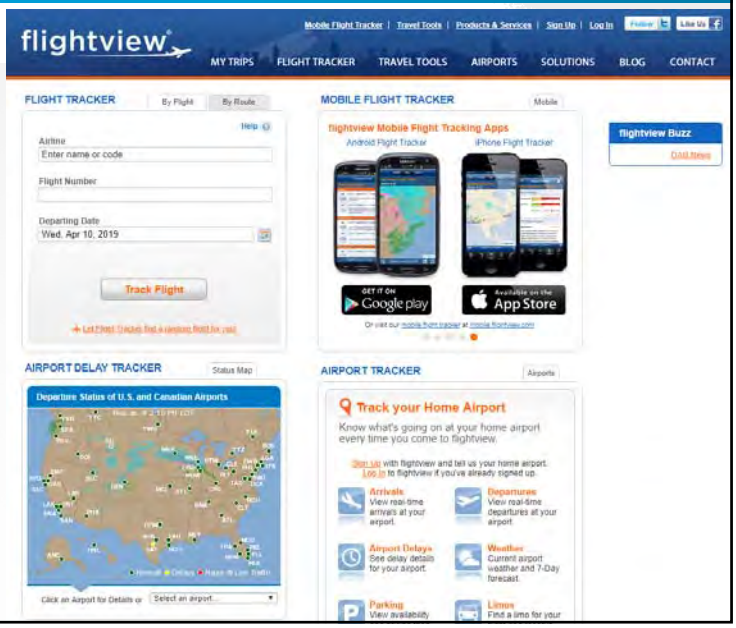
box — Box KeySafe – option to manage your own keys

EGNYTE — Egnyte Key Management SM – option to manage your own keys

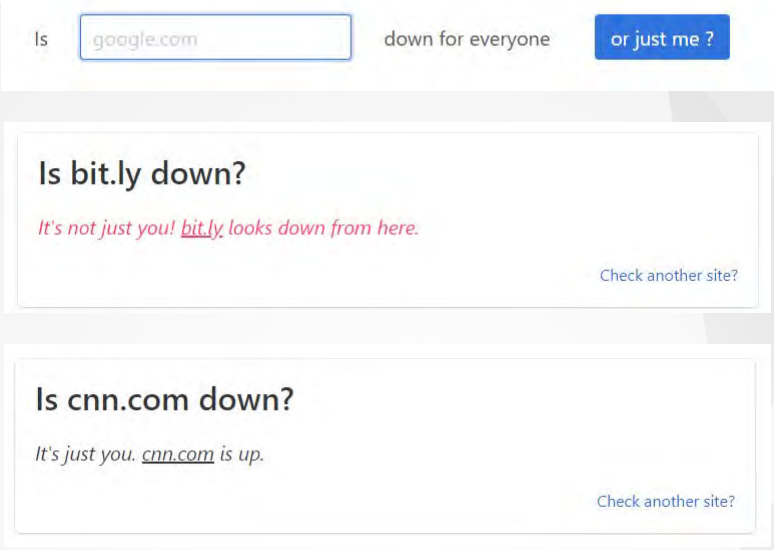
Affinity CONSULTING

Best Flight App

- **Invaluable if you experience flight problems**
- **Track incoming flight**
- **Android & iOS**



https://downforeveryoneorjustme.com/



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Tired of No-Flow Hotel Shower Heads?

- High flow shower head - $17
- 5” wrench - $14
- Plumbers tape - $4

$35 total

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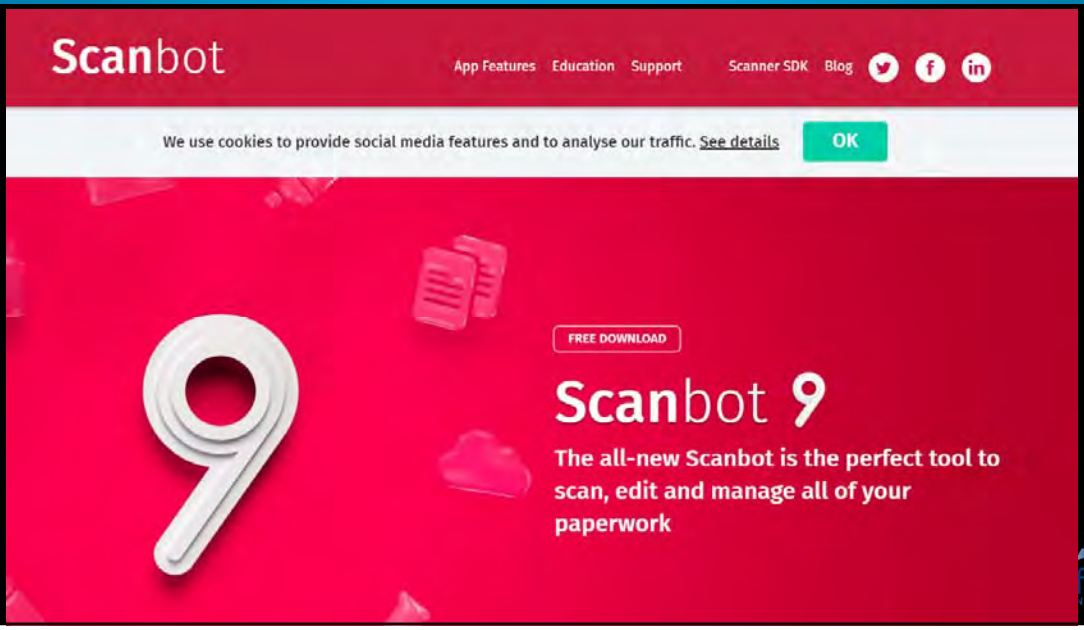
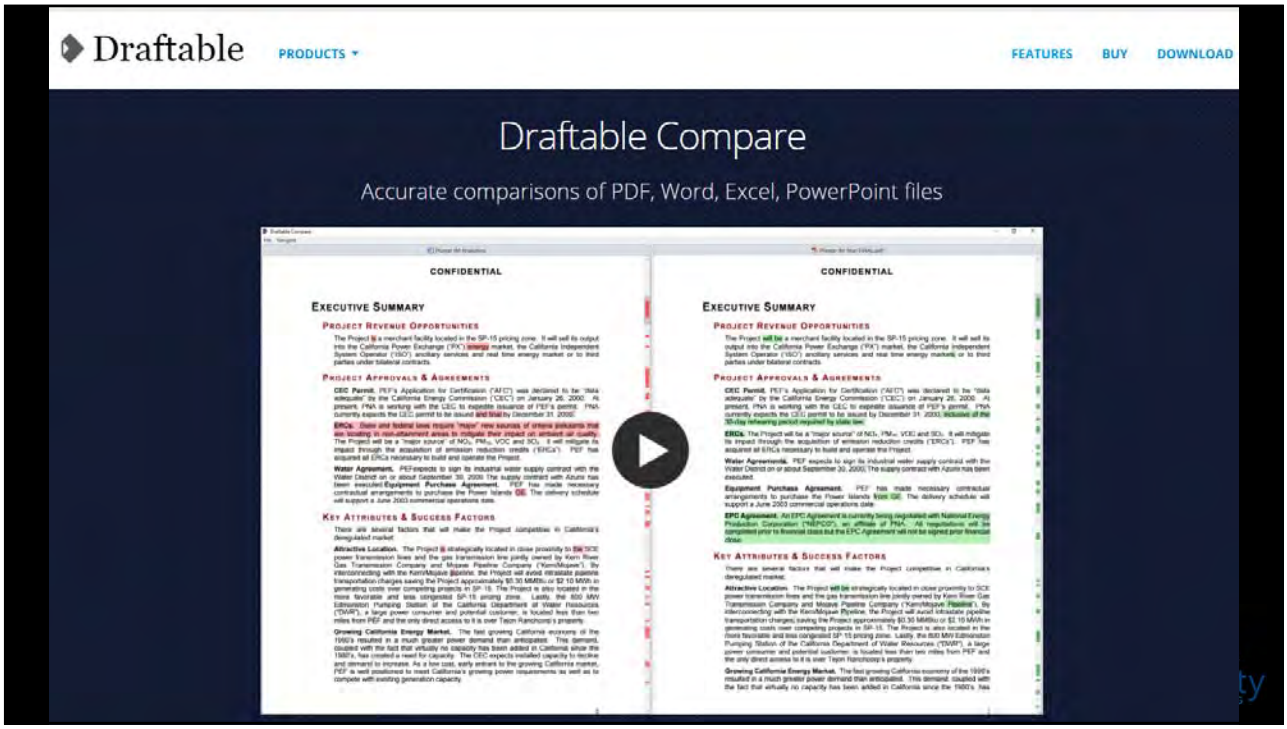
Scan To PDF From Your Phone





Awesome Microsoft Office Add-Ins

B

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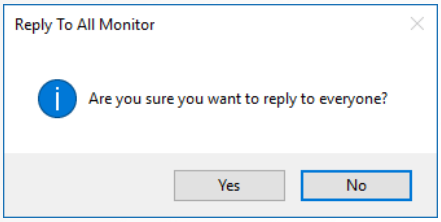
Fantastic Outlook Add Ins

- See www.sperrysoftware.com – they have 36 Outlook add-ins x
- Zoom Email Windows - $10
- Reply To All Monitor - $15



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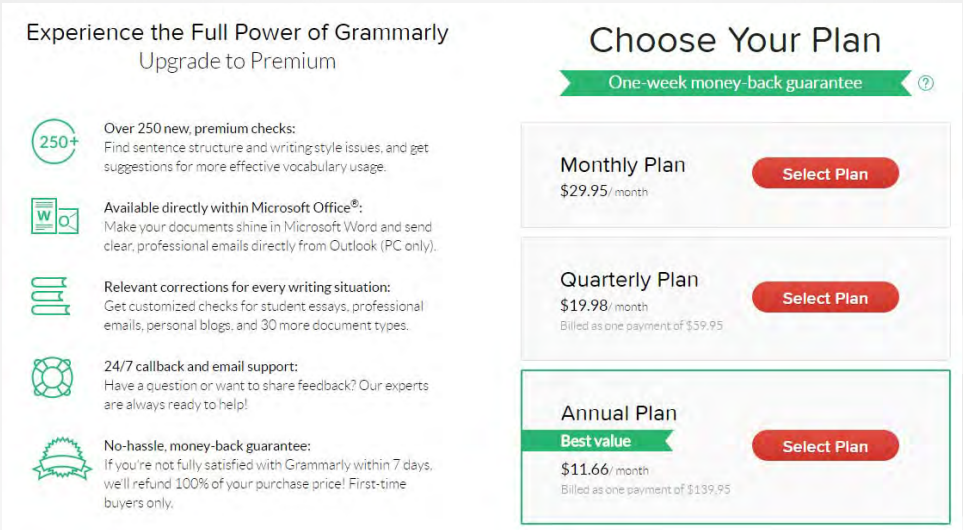
Grammarly for Word & Outlook

Free version or Premium version



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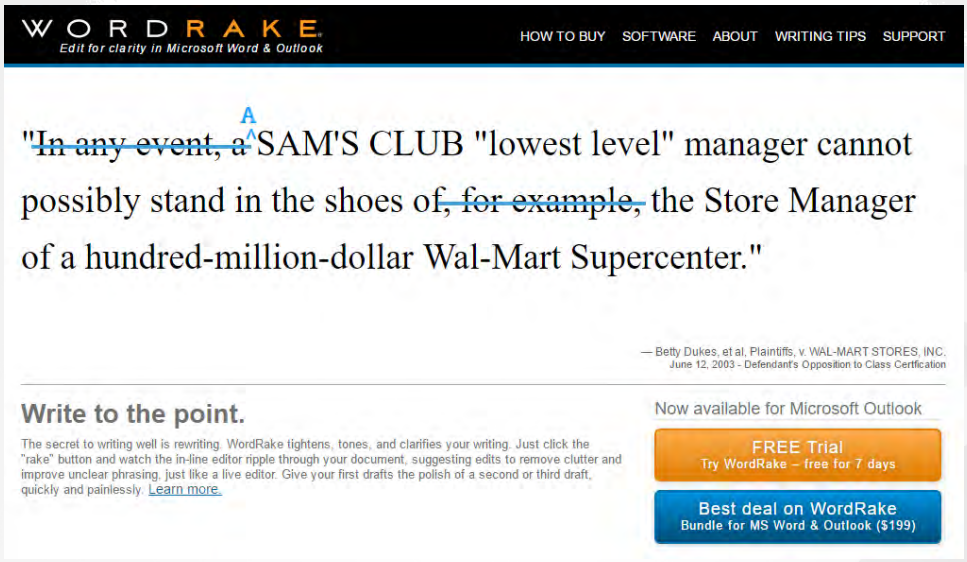
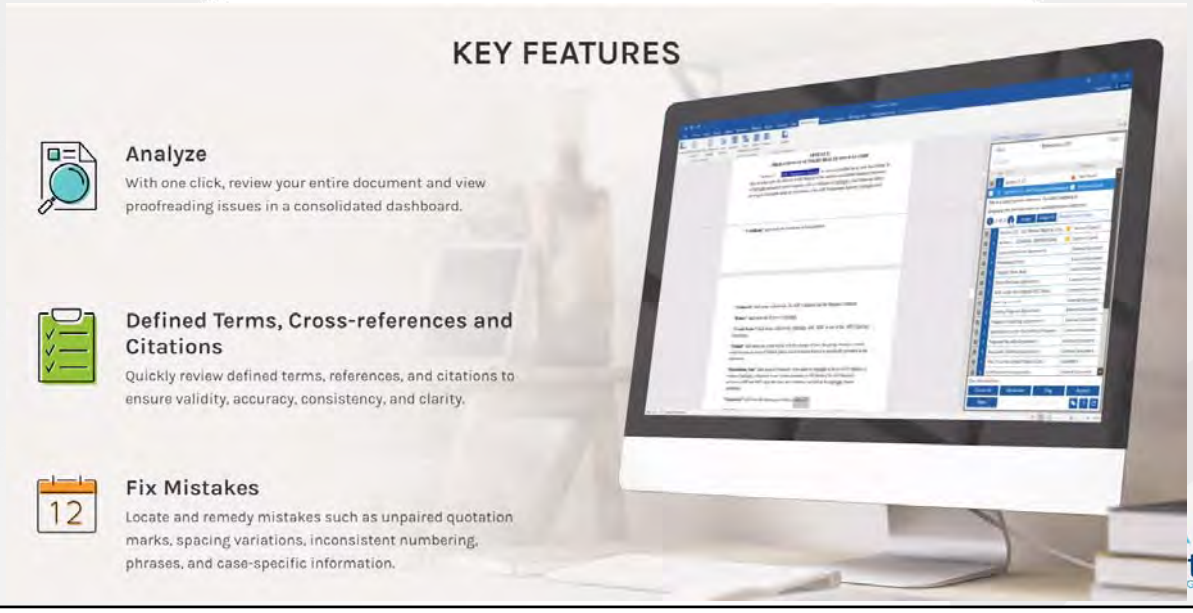
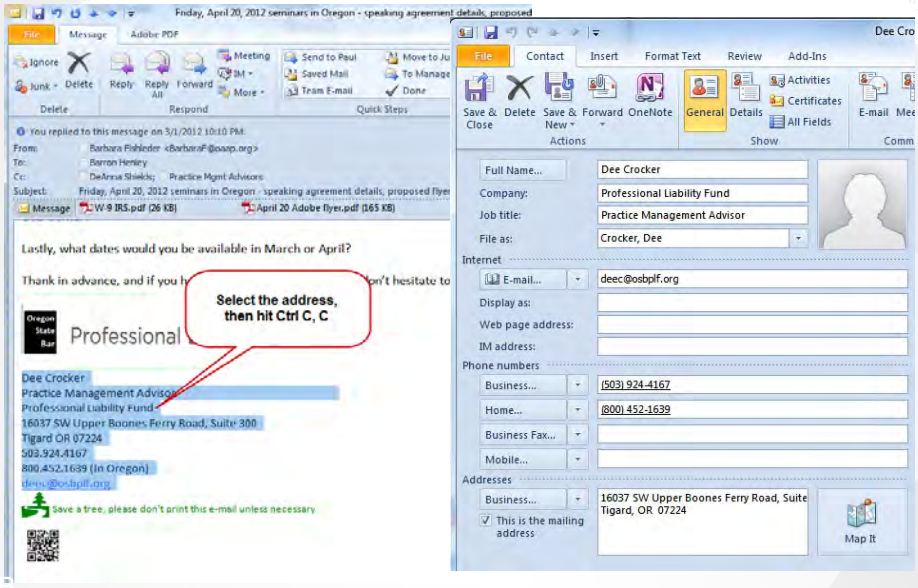
WordRake



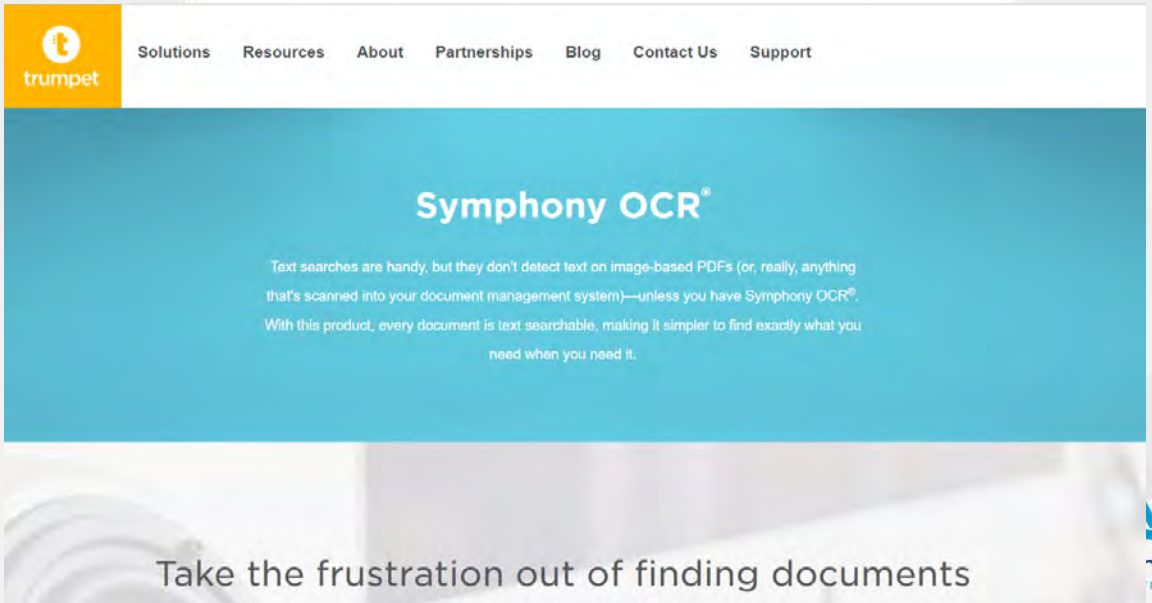
Litera Contract Companion



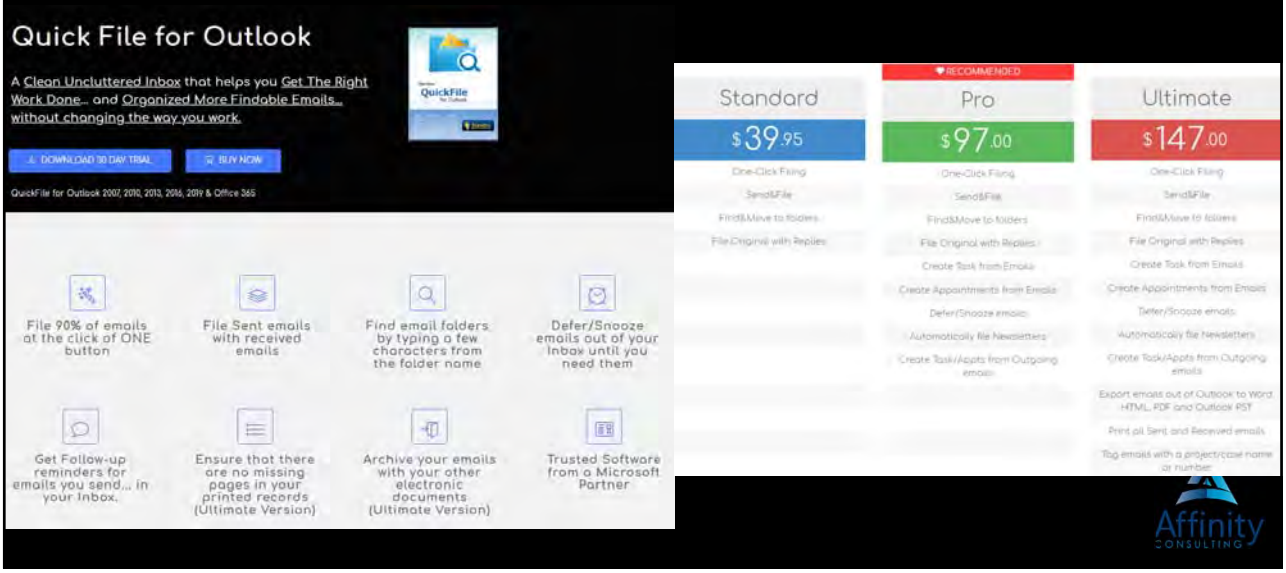
Copy2Contact.com



Trumpet Symphony OCR



Buried in Email with Outlook? Try Quick File



Cooking Tip #1

Life is too short to use dull knives

Chef's Choice 15 Trizor XV EdgeSelect Electric Knife Sharpener - $129

Affinity CONSULTING

Cooking Tip #2

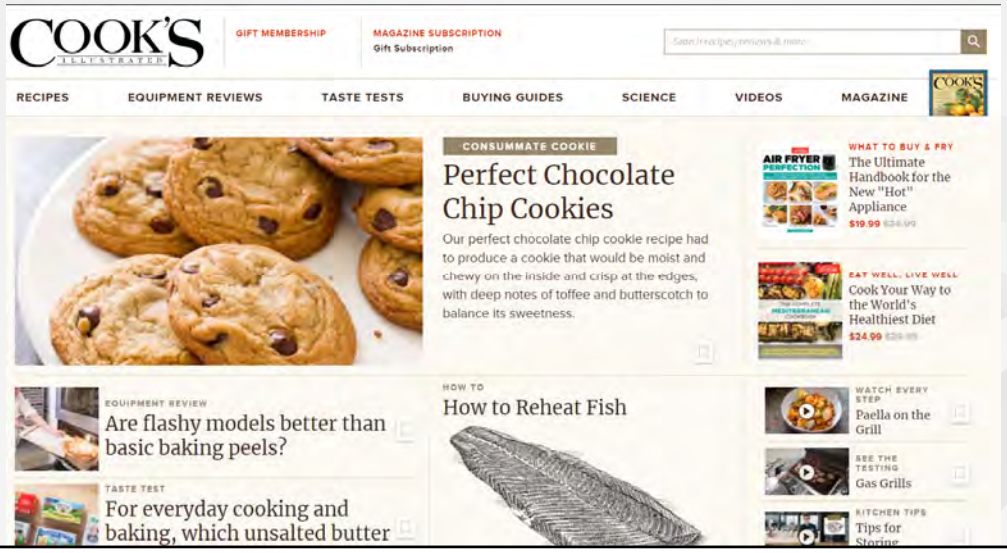
Life is too short to buy knives you have to baby, can't put in the dishwasher, and have to hand-sharpen

Victorinox Fibrox Pro Chef's Knife, 8-Inch Chef's FFP
by Victorinox
2,824 customer reviews | 158 answered questions
Amazon's Choice for "victorinox knife"
Price: $31.22 prime
FREE One-Day Pickup. Details

Victorinox 7 Inch Swiss Classic Santoku Knife with Granton Blade
by Victorinox
77 customer reviews | 9 answered questions
Price: $37.99 prime
FREE One-Day Pickup. Details
Pay ~~$37.99~~ $5.92 after using available Amazon Rewards Visa Card Points.
Style Name: Swiss Classic
Santoku & Paring $54.95 prime
Swiss Classic $37.99 prime

Cooking Tip #3

You NEED a subscription to Cooks Illustrated



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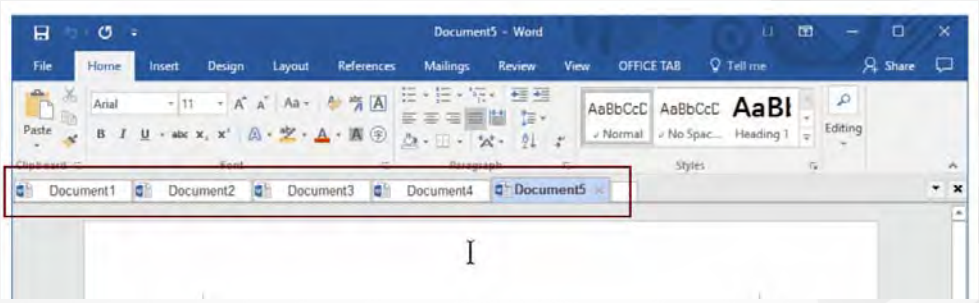
Add Document Tabs in Word

- **Makes Word & Excel work like your browser - $29**
- **https://www.extendoffice.com/product/office-tab.html**



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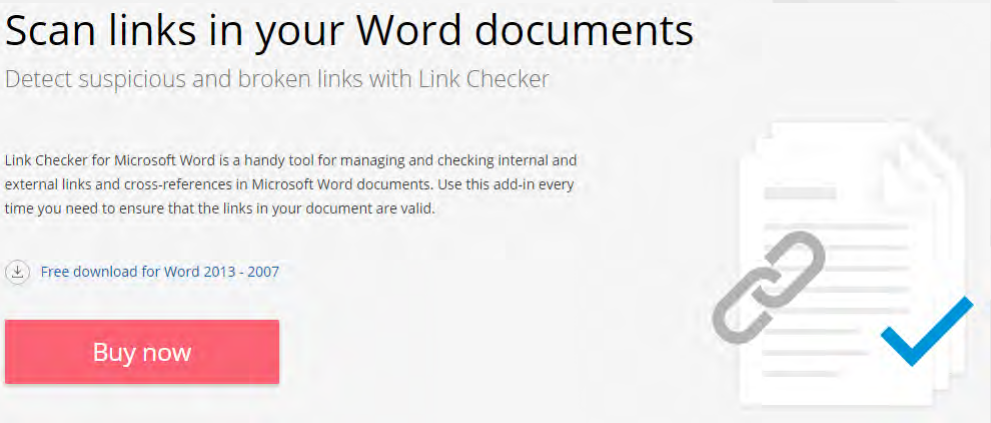
Check For Broken Hyperlinks In Word

- **Only $9.95 - - http://bit.ly/2TyGSgj**



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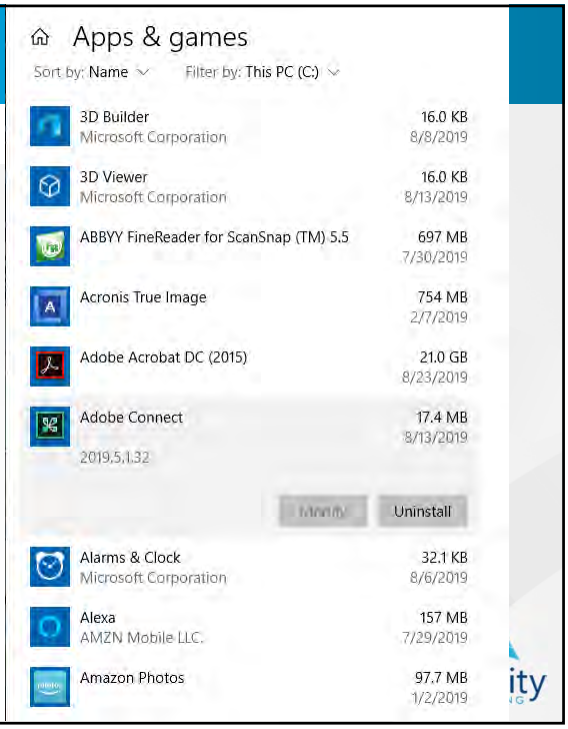
Free Up Hard Drive Space

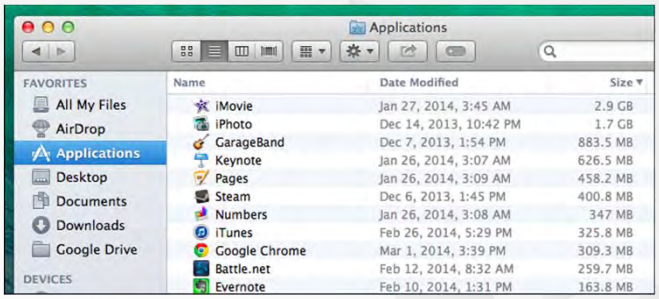
Windows 10

Right-click your desktop ➔
Display Settings ➔
Storage (left side) ➔
Click the C:\drive ➔
Click Apps & games



Free Up Hard Drive Space

Open a Finder Window (Command + T) ➔
Click Applications ➔
Click "Show items in a list" button on toolbar ➔
Drag applications to trash can



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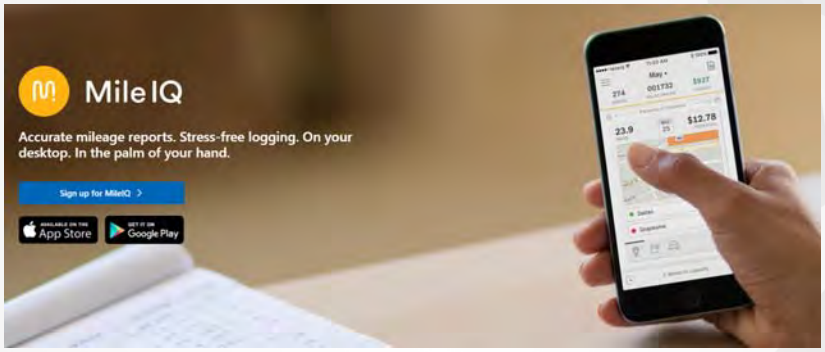
Automatic Mileage/KM tracking with MileIQ

- **Automatic mileage/km tracking via MileIQ app**
- **Included for free with Office 365 Business, Business Premium & higher bundles**
- **US: https://www.mileiq.com/**



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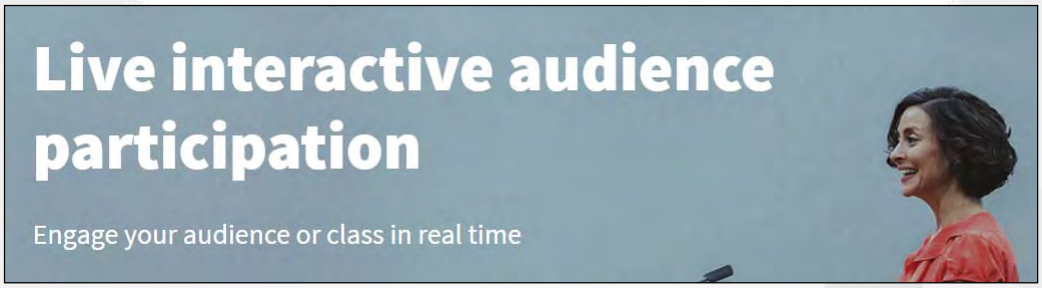
Poll Everywhere



	Intro	Present	Engage	Teams	Enterprise
			MOST POPULAR		
	Free	**$120** per year	**$42** per month (billed annually)	**$84** per month (billed annually)	**$9,999+**
	Sign up	Sign up	Sign up	Sign up	Contact us
Unlimited questions ⓘ	✓	✓	✓	✓	✓
Audience Size ⓘ	25	700	700	700	Custom

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Portable Full HD Second Monitor

ASUS MB169B+ (USB 3) or MB 169C+ (USB-C) 15.6-Inch Screen - $180

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Portable Full HD Second Monitor (option 2)

Mobile Pixels Duex Pro Portable Monitor for Laptops 12.5" Full HD - $249

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Use Tablet as Second Monitor

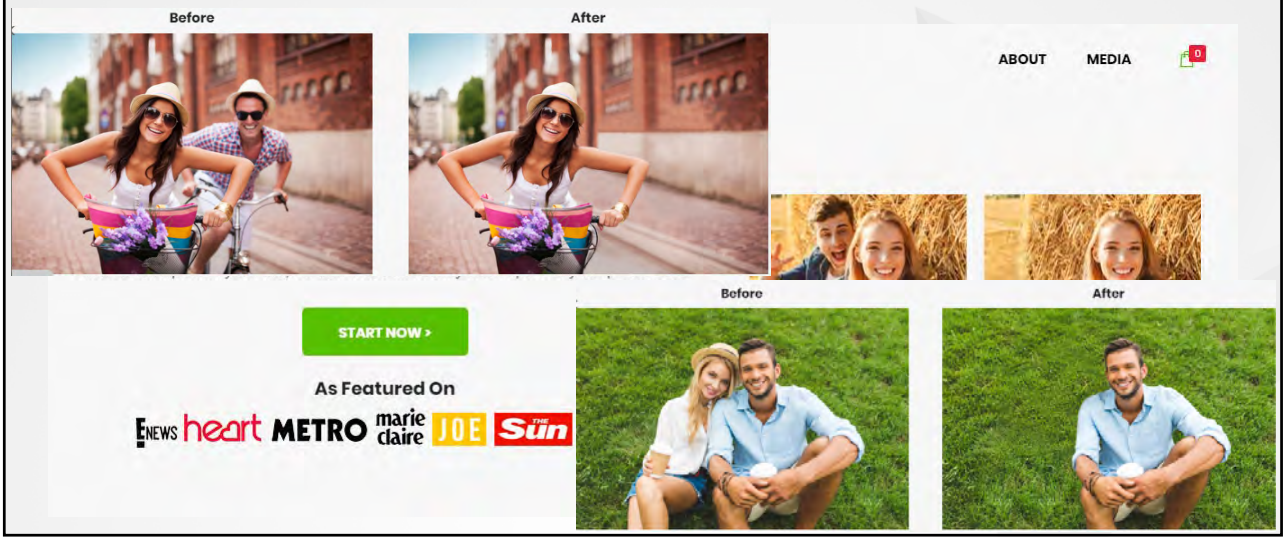
- **iPad: Duet App ($16) – Win or Mac**
- **Android: AirDisplay ($5) or iDisplay ($5) – Win or Mac**

www.remove.bg

Remove the background of any photo for free

Remove Your Ex from Photos

www.editmyex.com – starting at $9/photo

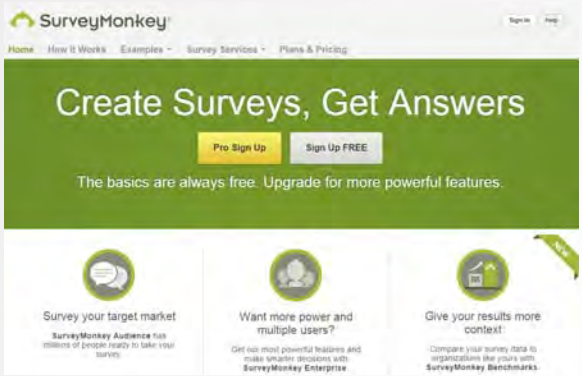


Poll Your Clients

Want to know what your clients *really* think?

Try asking them.

SurveyMonkey x



Microsoft Forms x

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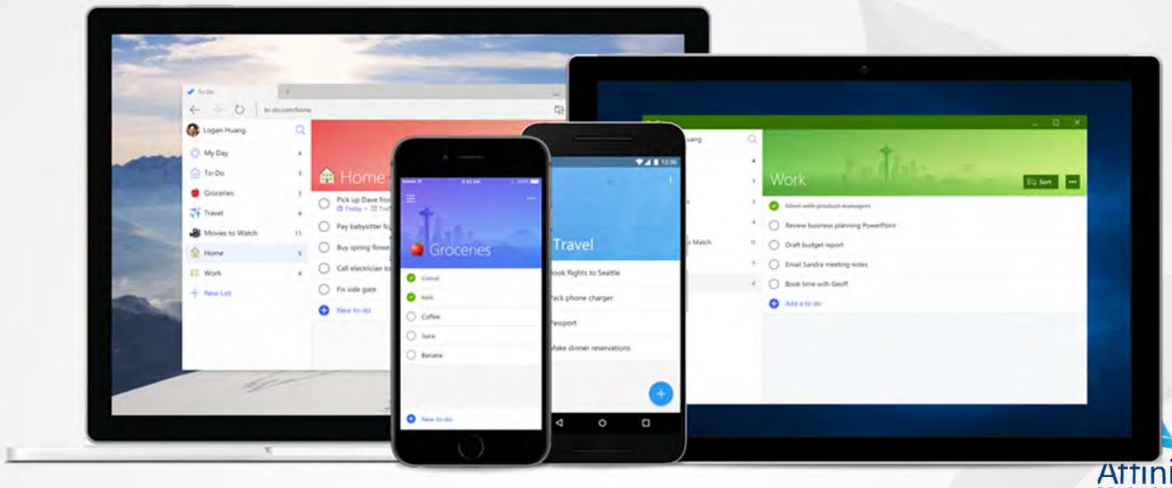
Microsoft ToDo

The best free to-do/task management system



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Microsoft Bookings – O365

http://bit.ly/2wZossL - x - also consider Calendly

Microsoft Bookings

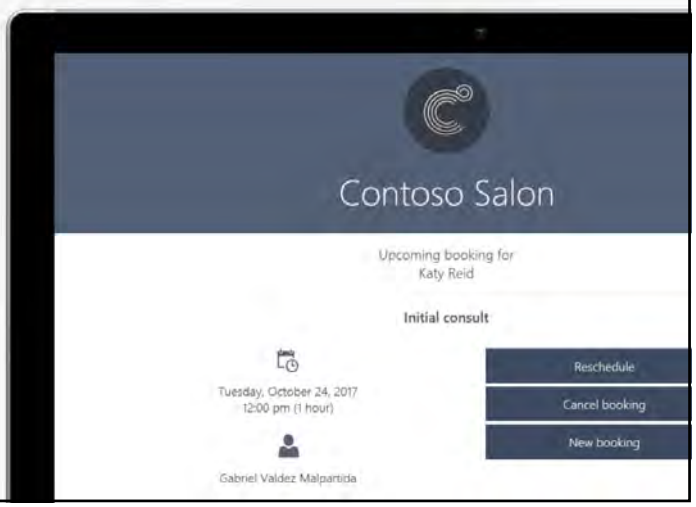
Simplify how customers schedule and manage appointments.

Designed for small businesses.

TRY 1-MONTH FREE

BUY NOW WITH OFFICE 365

WATCH THE VIDEO >



Automatic Bluebook Citations in Word

LegalCite - $1.49/month – free trial - http://bit.ly/2TDgqCg

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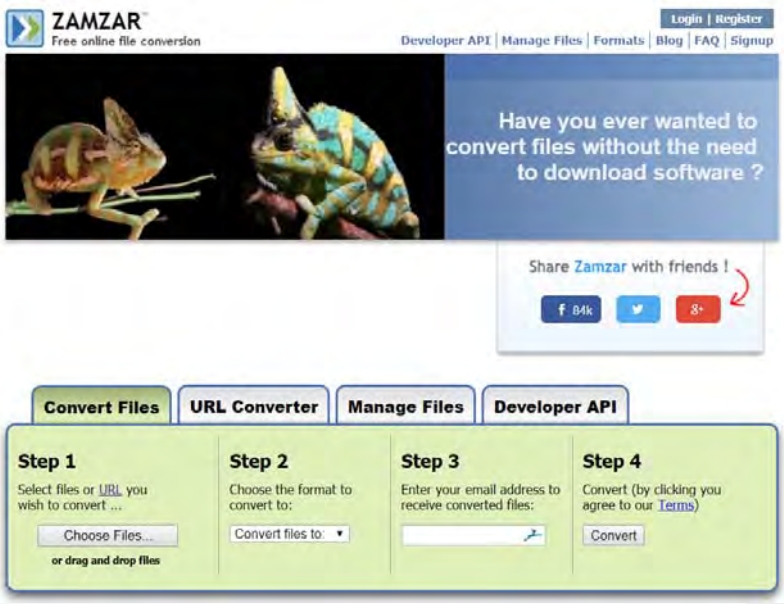
Convert Any File To Any Other File



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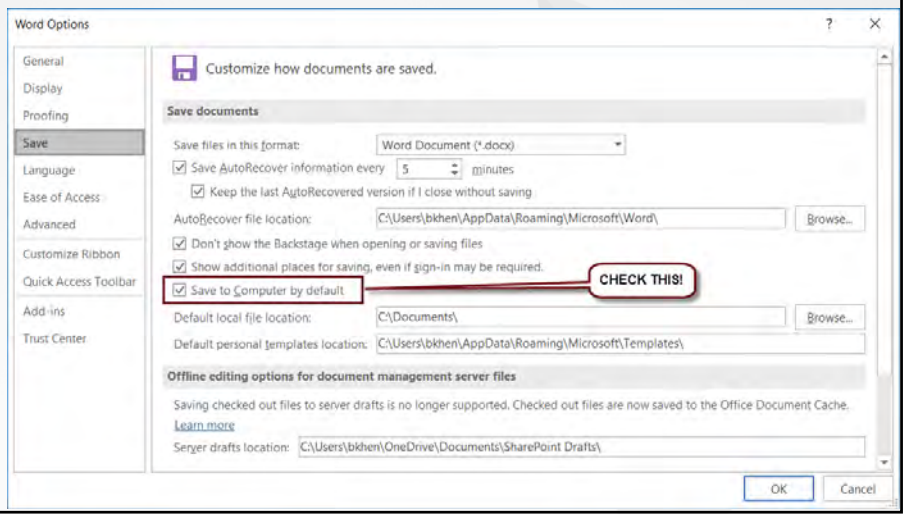
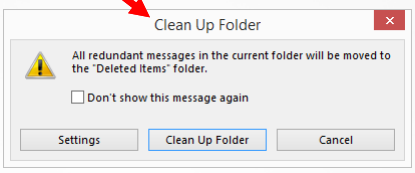
Word for Windows Mandatory Fix

- **Word 2016/19/365 saves to the cloud (OneDrive) by default**
- **Fix this!**
- **File menu > options > save**



Outlook Tip

Get rid of redundant messages in a thread



Airport Entertainment

Roll over image to zoom in

Ozzy's FakeOut-Let

Ozzy's Fake Stick-on Power Outlet-- 2 Pack Beige 3" x 5"--Real Electric Outlet Faceplate & Receptacle with sticky adhesive backing

7 customer reviews

Price: $14.95 & FREE Shipping

Note: Not eligible for Amazon Prime.

In Stock.

Get it as soon as Tuesday, Feb. 13 when you choose **Two-Day Shipping** at checkout.

Ships from and sold by 35 Main Gifts.

- Two individually wrapped joke outlets. Actual outlet not a sticker.
- Great practical joke.Just stick to any flat surface and watch them try (and fail) to plug in!
- Standard Beige duplex outlet with 3x5" Nylon Faceplate-- use removable tape or magnets for multi-use
- Backing is adhesive sticky foam sheeting-- sticks to most flat surfaces
- Actual Plastic Electrical Outlet Faceplate & Receptacle

New (1) from $14.95 & FREE shipping.

Report incorrect product information.

amazon pickup points Order by 12pm, pick up the same day

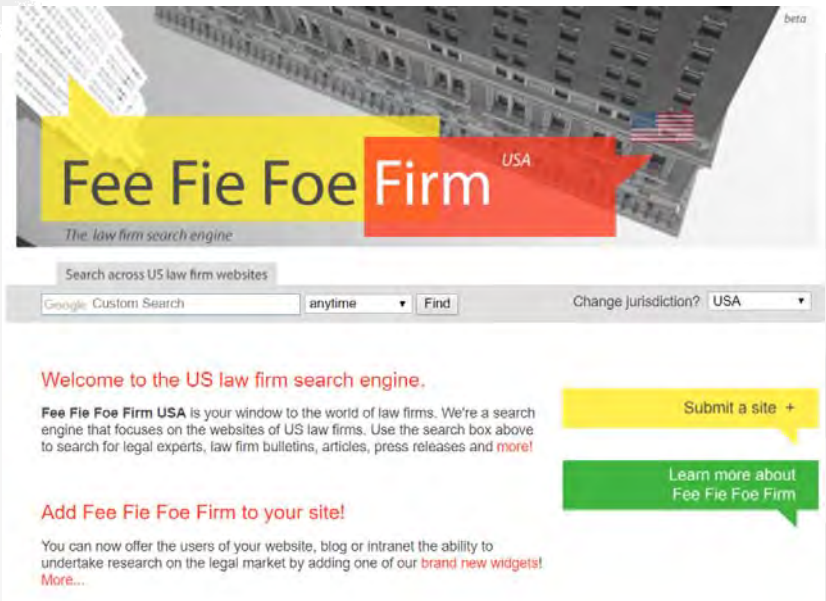
amazonhome services

Let a pro do a deep clean

Schedule ›

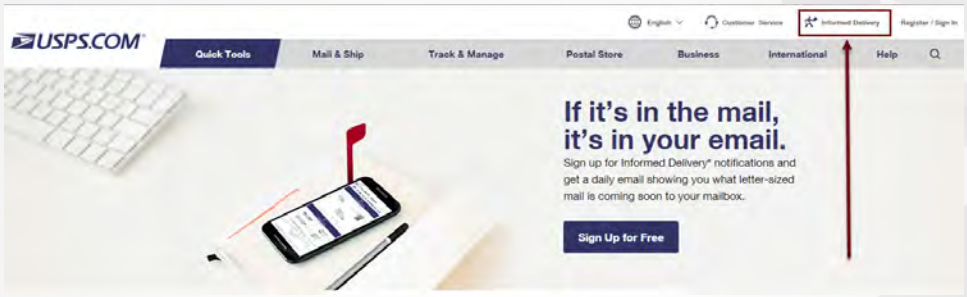
BONUS TIP

http://www.feefiefoefirm.com/



USPS Informed Delivery

- Sign up for free at www.usps.com
- Get scanned images of income mail emailed to you x



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Smart Alert for Mail

- Wireless mailbox activity monitor
- 150 foot range
- $59

https://smile.amazon.com/

AmazonSmile is a website operated by **Amazon** with the same products, prices, and shopping features as **Amazon**.com. The difference is that when you shop on **AmazonSmile**, the **AmazonSmile** Foundation will donate 0.5% of the purchase price of eligible products to the charitable organization of your choice.

amazonsmile

You shop. Amazon gives.

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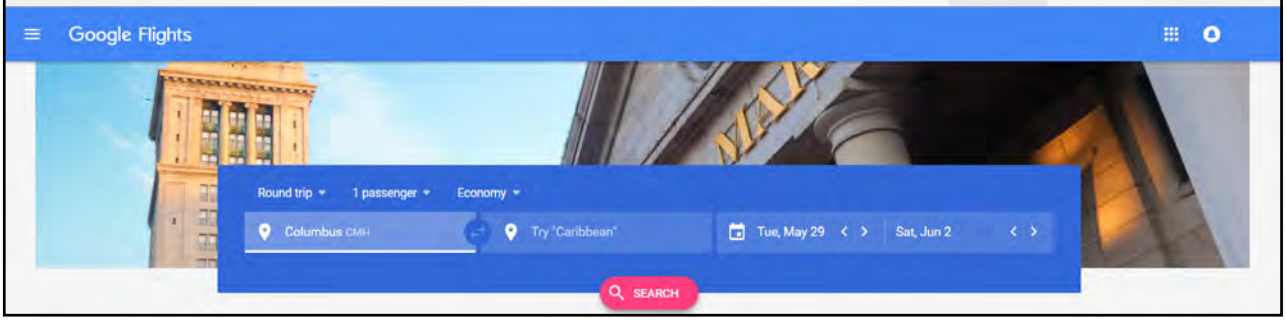
https://www.amazon.com/Handmade

Affinity CONSULTING

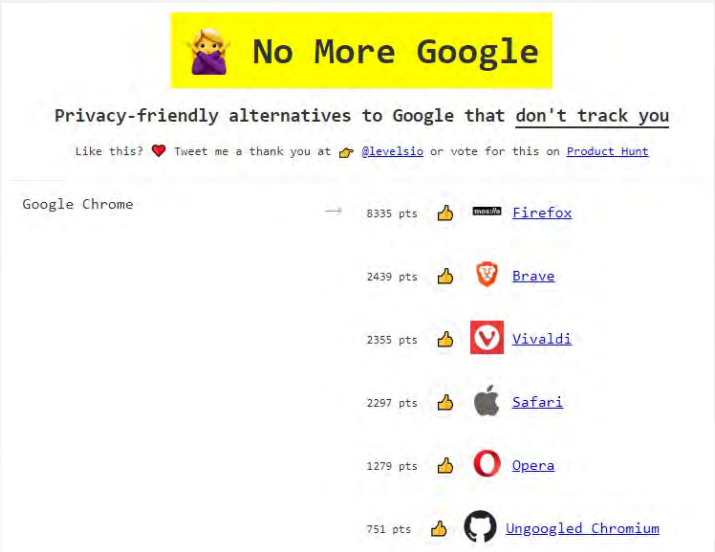
www.google.com/flights

- Ridiculously fast
- Identifies the best deal
- Finds $ saving alternatives
- Tracks your trips
- Tells you when to buy
- Helps you fly regionally
- Can predict flight delays
- Shows Southwest



Don't Trust Google ?

https://nomoregoogle.com/



Affinity CONSULTING

Got Dead Spots in Your Wifi?

Netgear Orbi AC3000 - $300

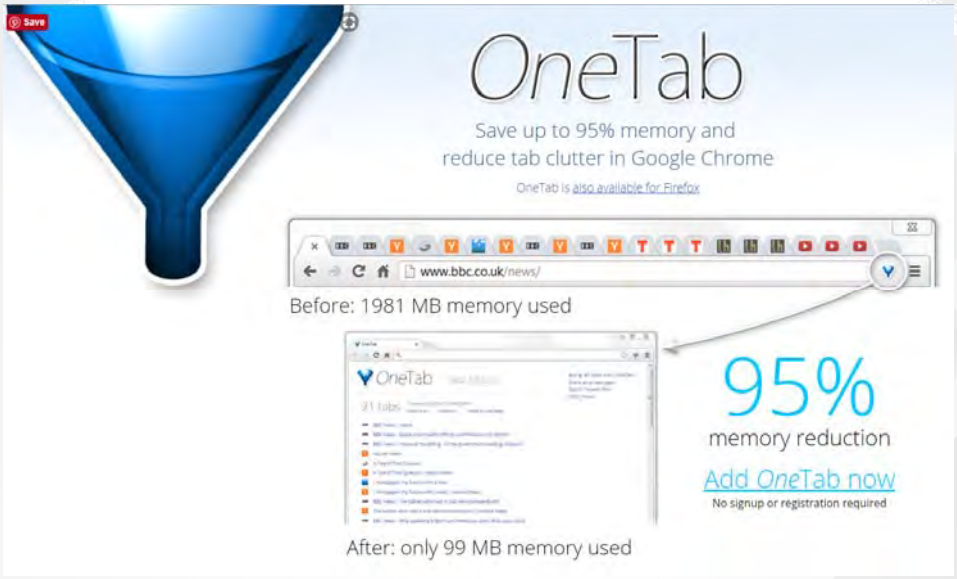
Affinity CONSULTING

Internet Tips

- **Test your speed – www.speedtest.net – make sure you're getting what you're paying for**
- **Call your internet provider once a year and see if they have faster speeds for less money**

Spectrum
comcast xfinity
COX
AT&T
CenturyLink
Affinity CONSULTING

www.one-tab.com



Is your practice wearing you out?

There's a Nap for That

Hover and click to magnify, click again to zoom.

The Productivity Boosting Nap Pod

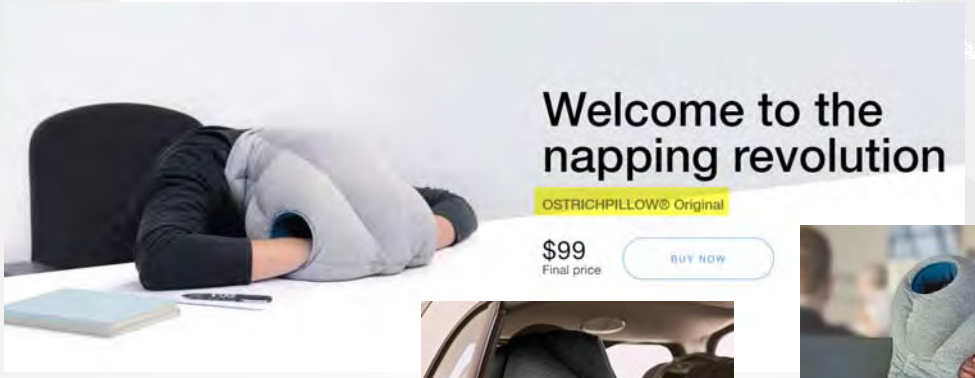
This is the pod that helps boost productivity by providing a rejuvenation space for taking 20-minute naps. Shown by NASA studies to improve concentration by 34%, power napping has been widely embraced by the world's most progressive companies as beneficial for well being. The pod's contoured, cushioned bed provides optimal ergonomics for napping by elevating the feet, relaxing the lower back, and slightly bending the knees, all of which promote blood circulation. Its spherical dome enclosure provides semi-privacy; a privacy visor provides additional seclusion. Controlled at the armrest, a built-in timer is set to a pre-programmed 20-minute nap, but can be set to any preferred nap time. A suite of ambient rhythms plays through the built-in 200-watt Bose speaker (or headphones jack) to eliminate surrounding distractions. The pod gently wakes nappers with slowly brightening light and vibration, minimizing grogginess. White glove delivery. Special conditions and guarantee limitations apply. 60" L x 57 1/4" W x 48" H. (310 lbs.)

Description

Item 12199 **Price $16,000**

For Personalized Service on this item please call 1-800-227-3528 and our Product Specialists will gladly answer all questions and provide additional information. Please note that special conditions and guarantee limitations apply to this product.

If You Can't Afford a Pod

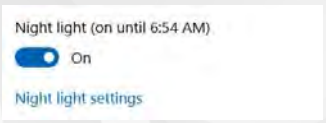


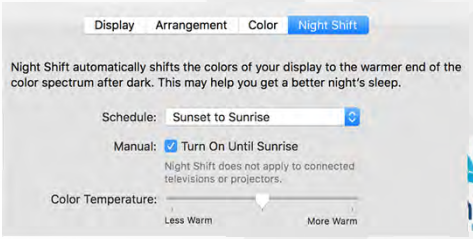
SnuzNLuz from ThinkGeek.com

If you hit snooze, it donates your $ to an organization you detest

Sleep Better with Blue Light Filter

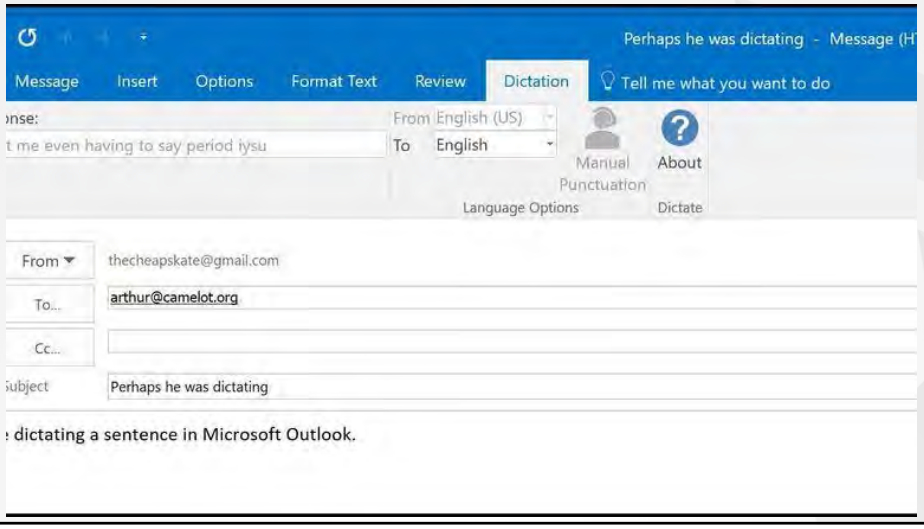
- **Blue light is said to have a harmful effect on your circadian rhythm, making it harder to fall asleep and stay asleep**
- **Windows 10: settings > system > display > night light**
- **Mac OSX: system preferences > display > night shift**



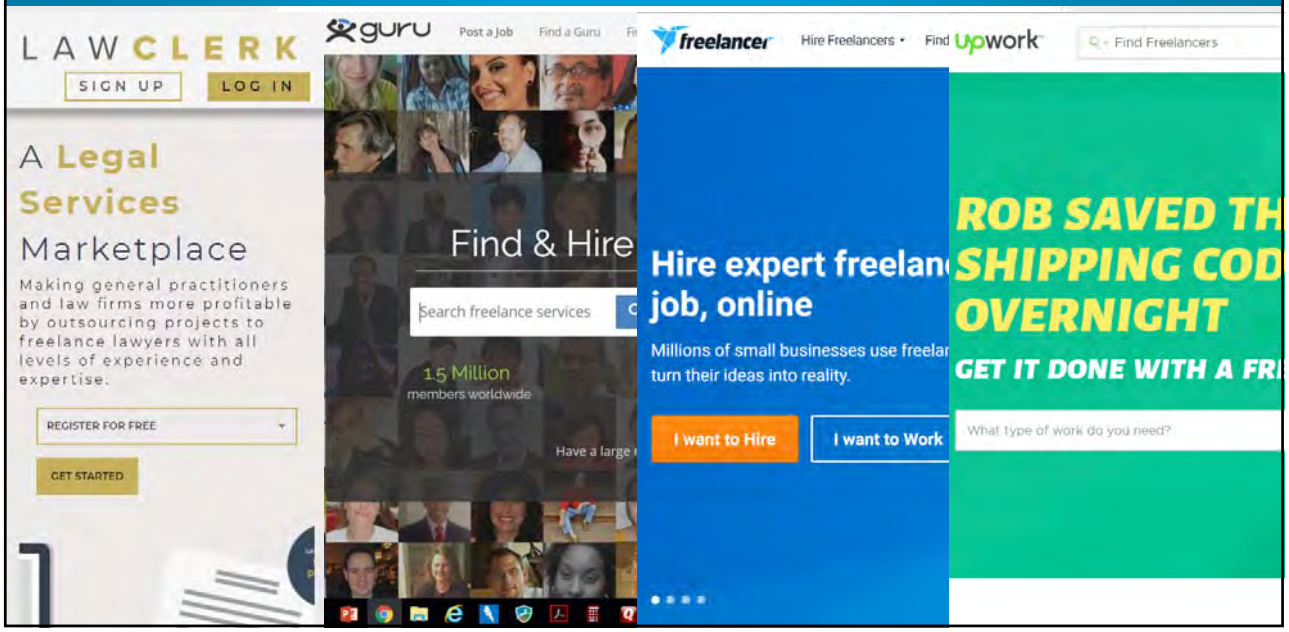


Microsoft Dictate

Download at http://dictate.ms/ - free



Need A Virtual Assistant? (or a job done?)



https://www.snopes.com/

Confirm it before you forward it

Did Texas Hunters Accidentally Shoot Each Other and Blame Undocumented Immigrants?

BETHANIA PALMA

PUBLISHED 5 DECEMBER 2018

Want To Fix Your Own Appliances?

- http://www.appliancepartspros.com/

AppliancePartsPros.com®
HELPING DO-IT YOURSELFERS SINCE 1999

- https://partsdr.com/

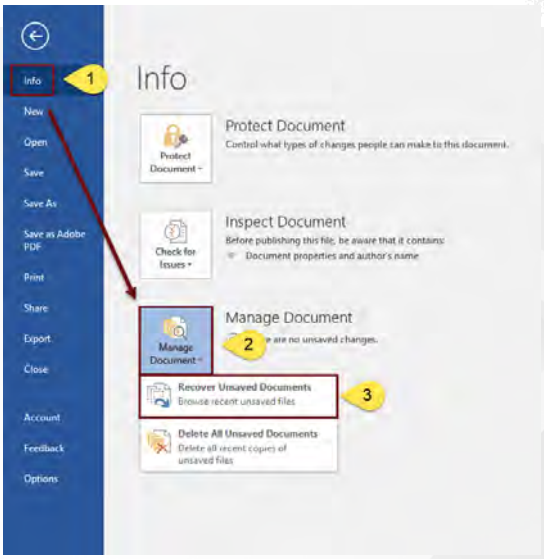
PartsDr

Affinity CONSULTING

Recover Unsaved Documents

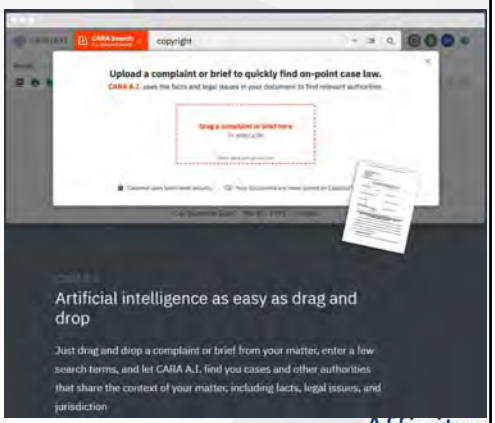
This is in Word 2010, 2013, 2016, 2019 & Office 365

File menu, then:



Let Artificial Intelligence Analyze Your Briefs

- **Upload briefs/motions – Artificial Intelligence analyzes in seconds and provides relevant case law**
- **Options**
  - **CARA Research Suite** (https://casetext.com)
  - **Attorney IO** (www.attorneyio.com)
  - **Judicata** (https://www.judicata.com/)
  - **CaseIQ** (https://www.casemine.com/caseiq)
  - **EVA –FREE** (https://eva.rossintelligence.com)



Geolocate Your Luggage

$70

$45

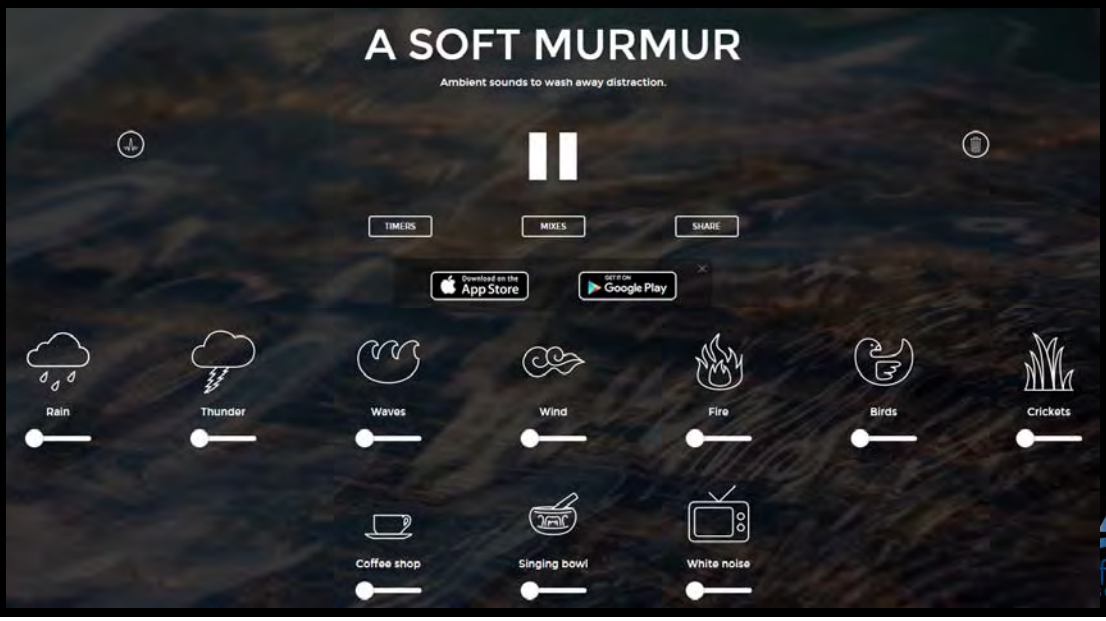
Affinity CONSULTING

https://sidewaysdictionary.com

Explains complex technical concepts via analogies x

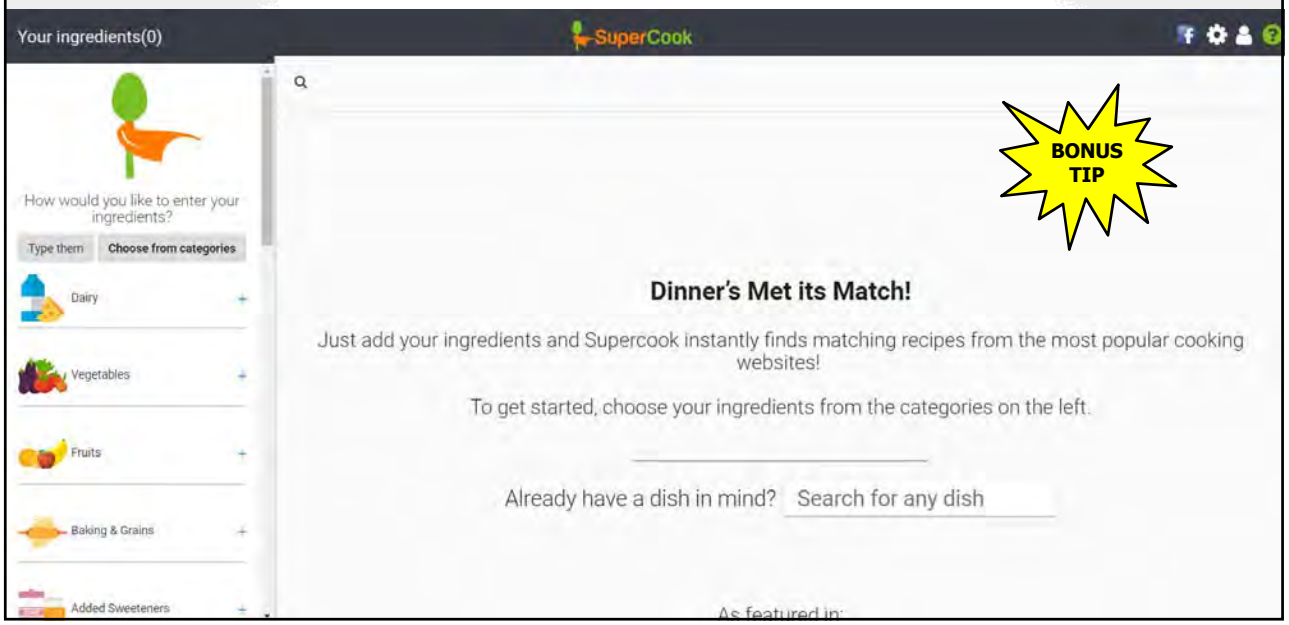
Affinity CONSULTING

https://asoftmurmur.com/



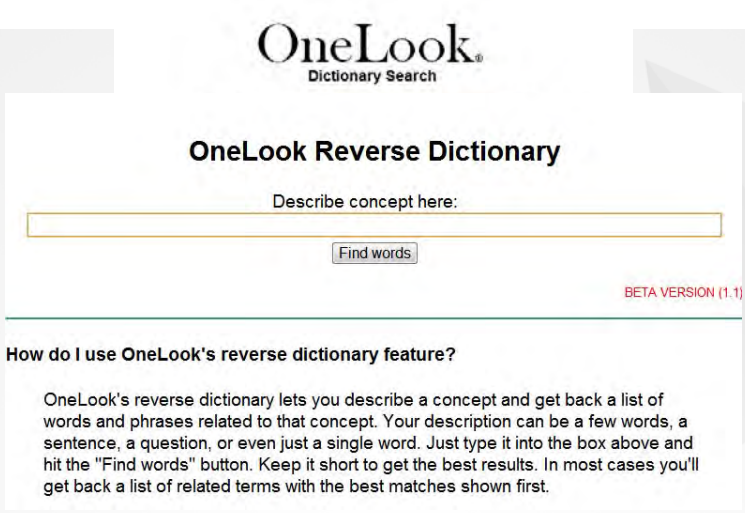
Automated Certified Mail Service

SuperCook



Best Web Dictionary (includes legal & medical)

x



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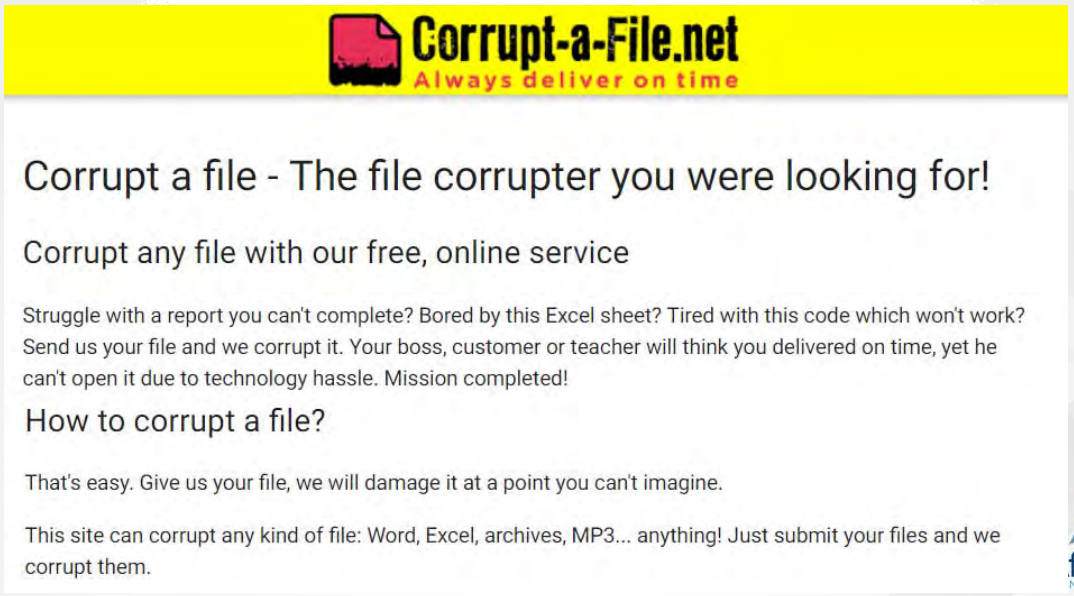
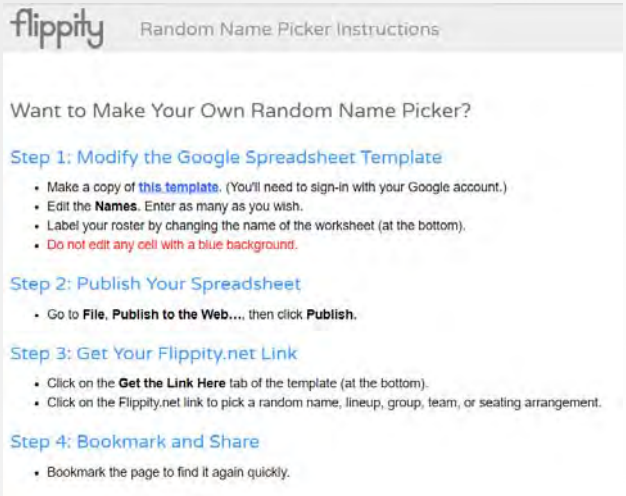
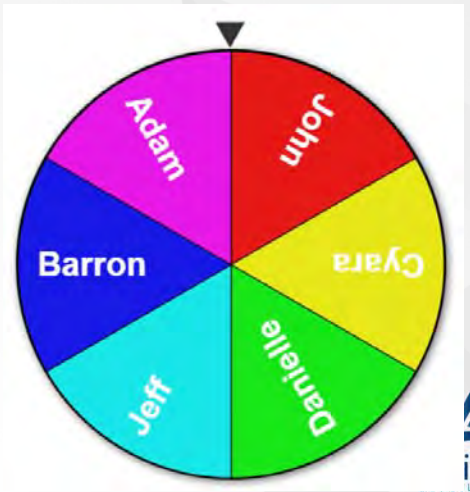
File This Under Evil



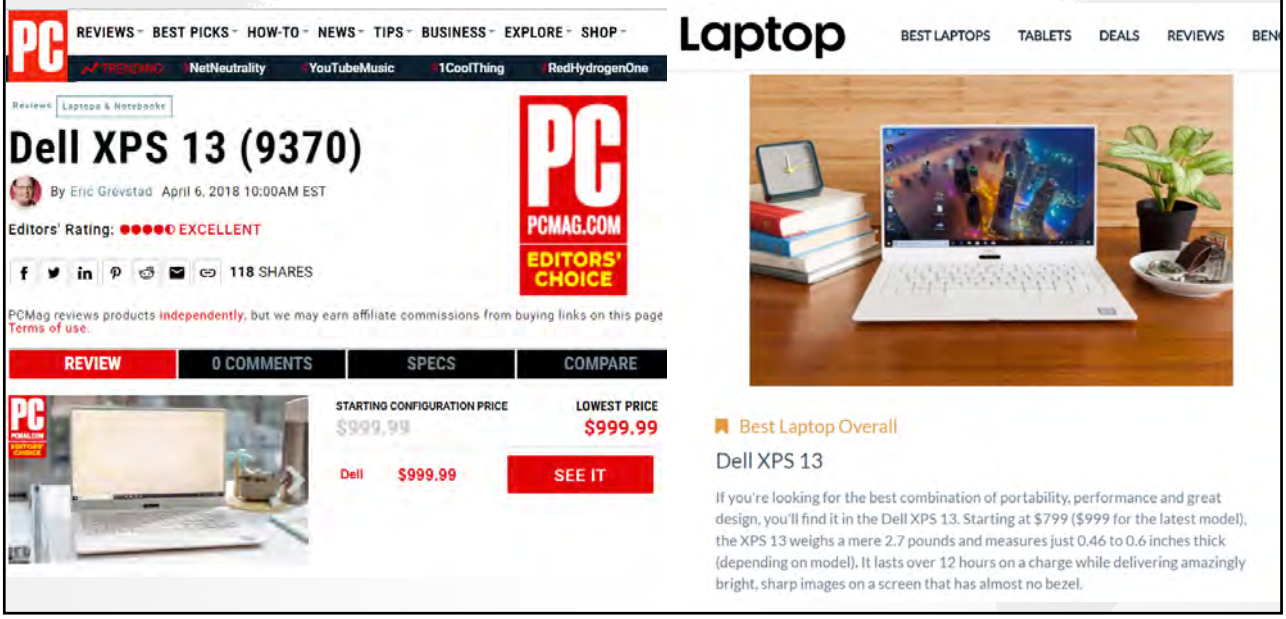
Create a Random Name Picker Wheel

Go to http://flippity.net/RandomNamePicker.asp x



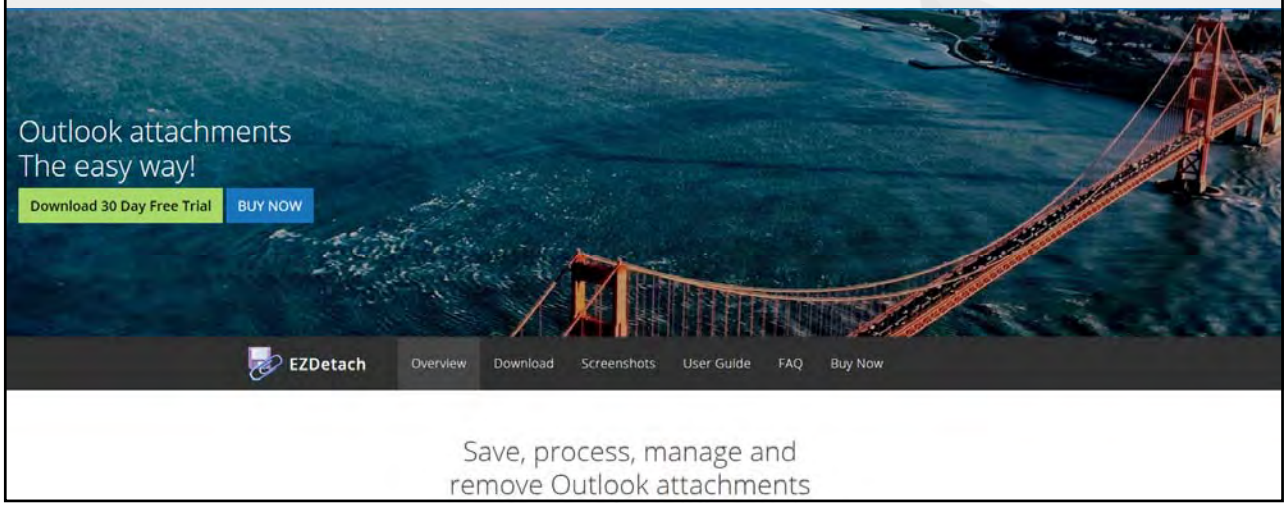


Best Laptop – Dell XPS 13



Detach and File Email Attachments Easily

EZDetach - $80 – free trial - http://bit.ly/2TAZ350

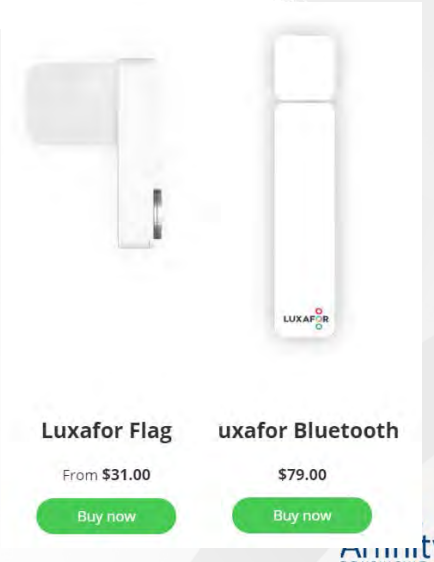


Best Wireless Headsets

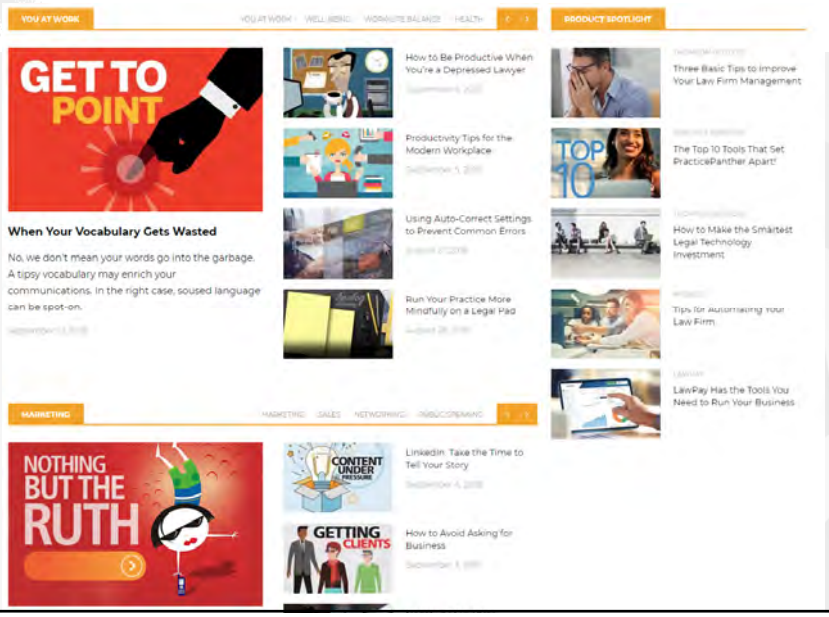
Plantronics CS530 **Plantronics W740 Savi**

Let People Know You're On The Phone

https://pro.luxafor.com/



www.AttorneyAtWork.com



www.hadonejob.com

BONUS TIP

DF

Ted Talks – www.ted.com

Please watch How Great Leaders Inspire Action by Simon Sinek

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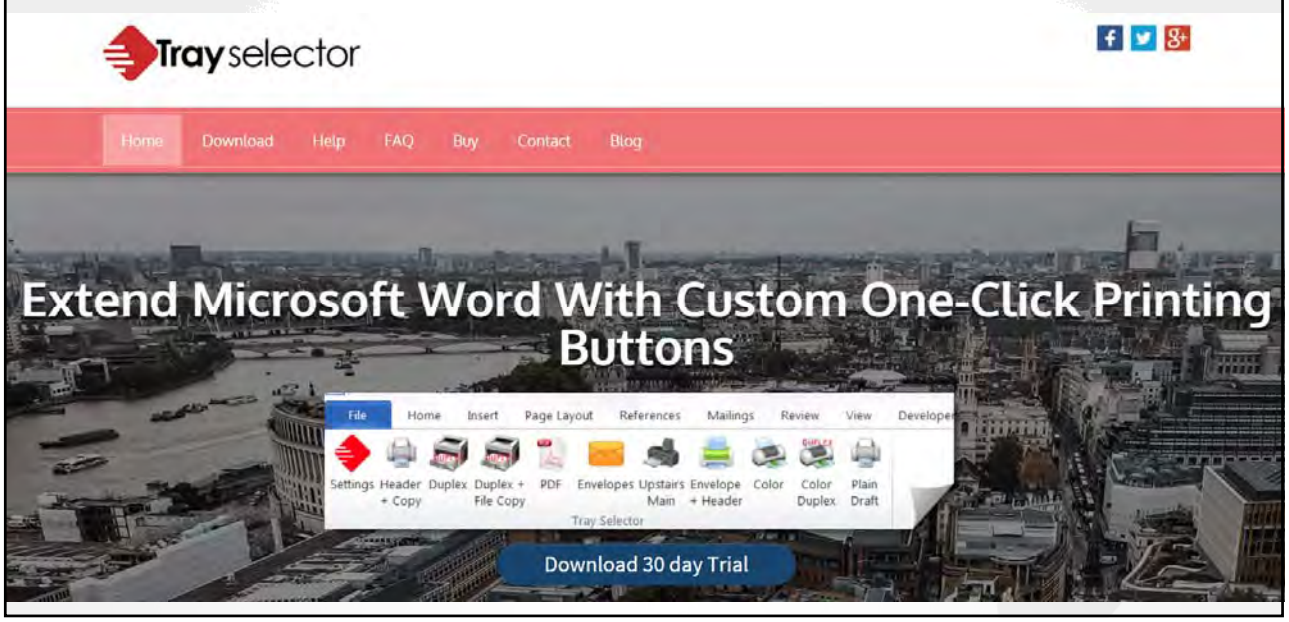
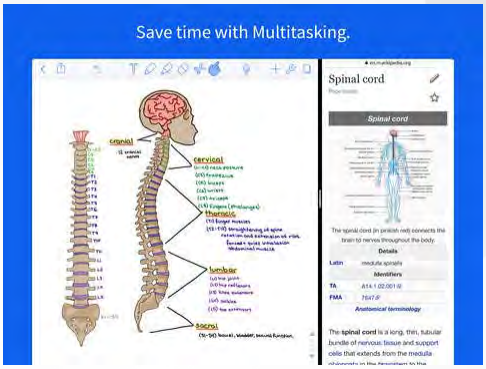
http://us.trayselector.com/



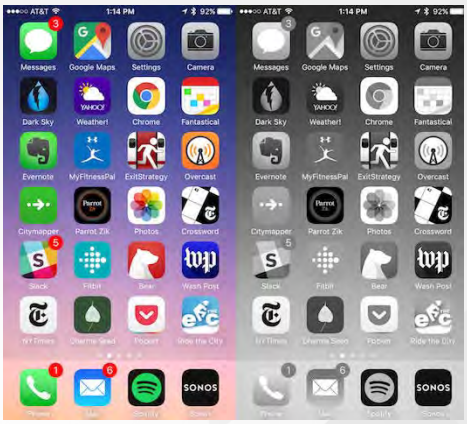
Notability for iPad Pro

Notetaking on Steroids
Handwriting, Typing, Recording
Markup PDFs, $7.99

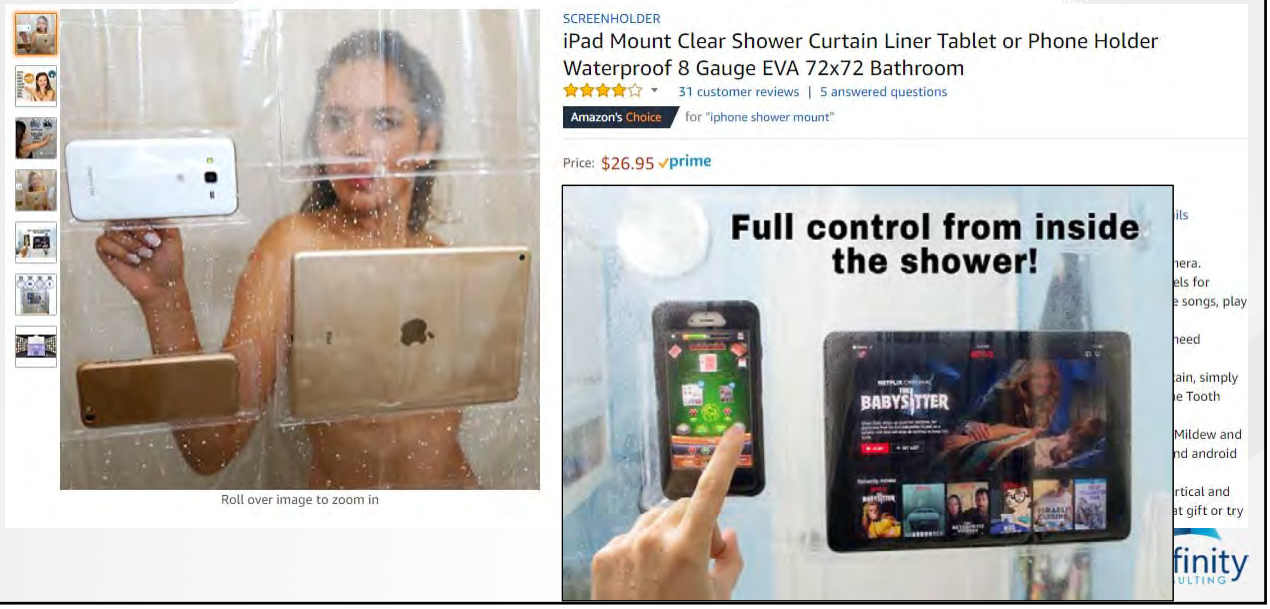


Cure Phone Addiction By Making It Boring

- **Part of the addiction is how the brain responds to color**
- **Turn it to grayscale**
- **See http://tinyurl.com/yb5rpgwj**



How To Tell You Have An Addiction



chromeTips

- **Space bar**: move down page at a time
- **Shift + space bar:** move up page at a time
- **F11:** full screen view
- **Ctrl + =** : zoom in
- **Ctrl + -** : zoom out
- **Ctrl + T**: open a new tab
- **Ctrl + W**: close the current tab
- **Ctrl + L**: select everything in the browser bar
- **Ctrl + Enter**: adds http:\\ and .com after whatever you type

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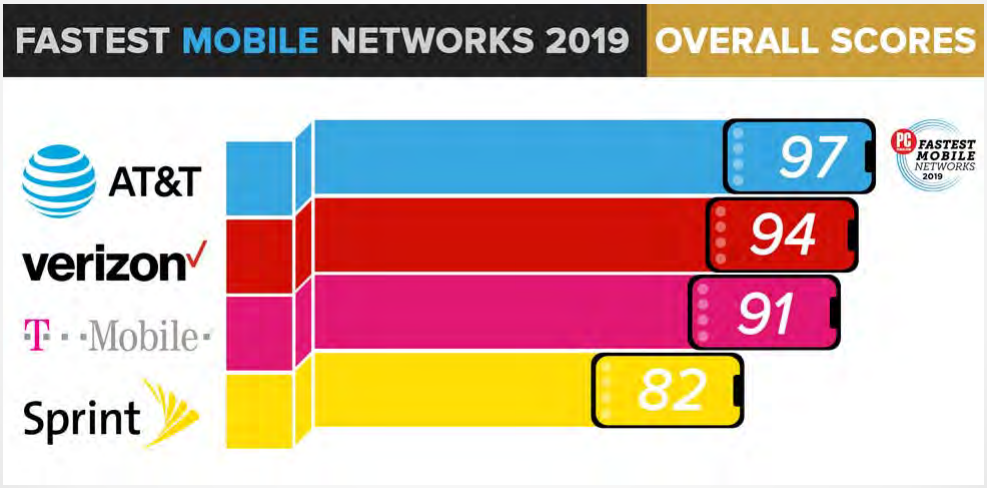
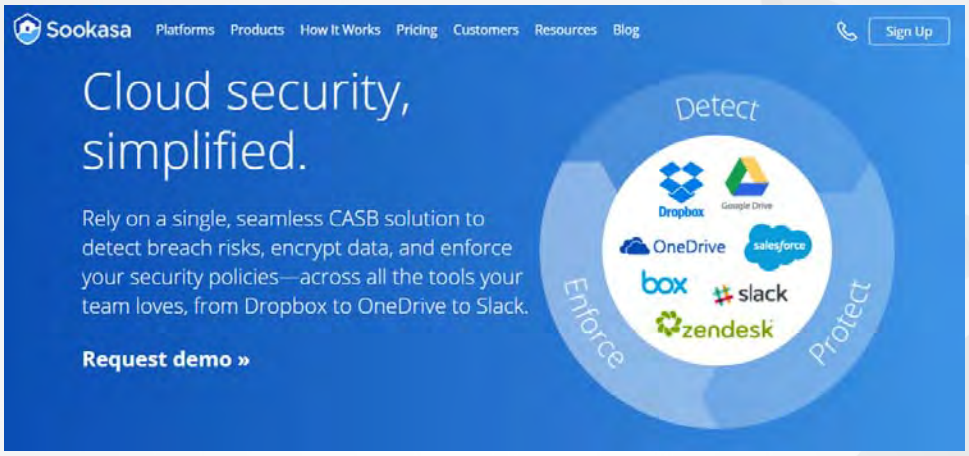
Fastest Cell Networks (www.pcmag.com)



Encrypt Your Dropbox

www.Sookasa.com



Affinity CONSULTING

Best. Mouse. Ever.

Roll over image to zoom in

Logitech

Logitech MX Master Wireless Mouse – High-precision Sensor, Speed-adaptive Scroll Wheel, Thumb Scroll Wheel, Easy-Switch up to 3 Devices

3,250 customer reviews | 384 answered questions

Price: $62.99 prime

FREE One-Day Pickup. Details

In Stock.

Want it tomorrow, Aug. 26? Order within **3 hrs 57 mins** and choose **Saturday Delivery** at checkout. Details

Ships from and sold by Amazon.com. Gift-wrap available.

Color: **Black**

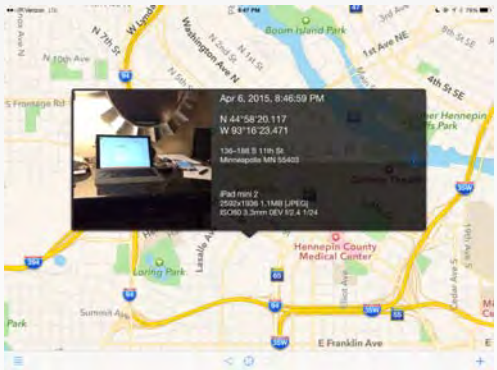
$62.99 prime | $74.98 prime | $71.99 prime

- Unique thumb wheel: For horizontal navigation and advanced gestures
- Easy connections for multiple computers: Use with up to three Windows or Mac computers via included Unifying receiver or Bluetooth Smart wireless technology
- Easy switching between computers with the touch of the button
- Tracks virtually anywhere - even on glass: The Dark field Laser sensor tracks flawlessly even on glass and high-gloss surfaces (4mm minimum thickness)
- Advanced power management: Up to 40 days of power on single charge. You can get enough power for a full day of usage in only 4 minutes, with no downtime while recharging. (Battery life may vary based on user and computer conditions)

Affinity CONSULTING

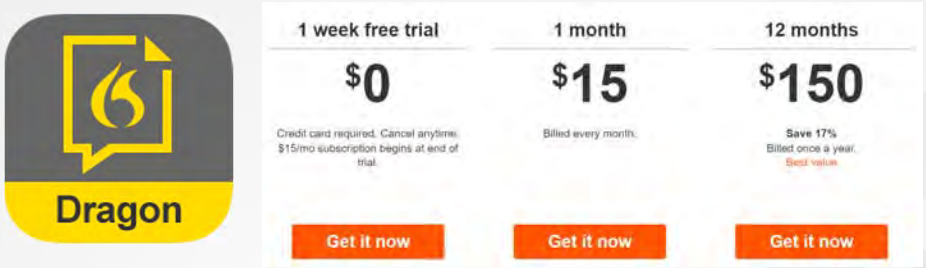
Koredoko

Explore metadata of photographs sent from Smartphones



Affinity CONSULTING

Dragon Anywhere

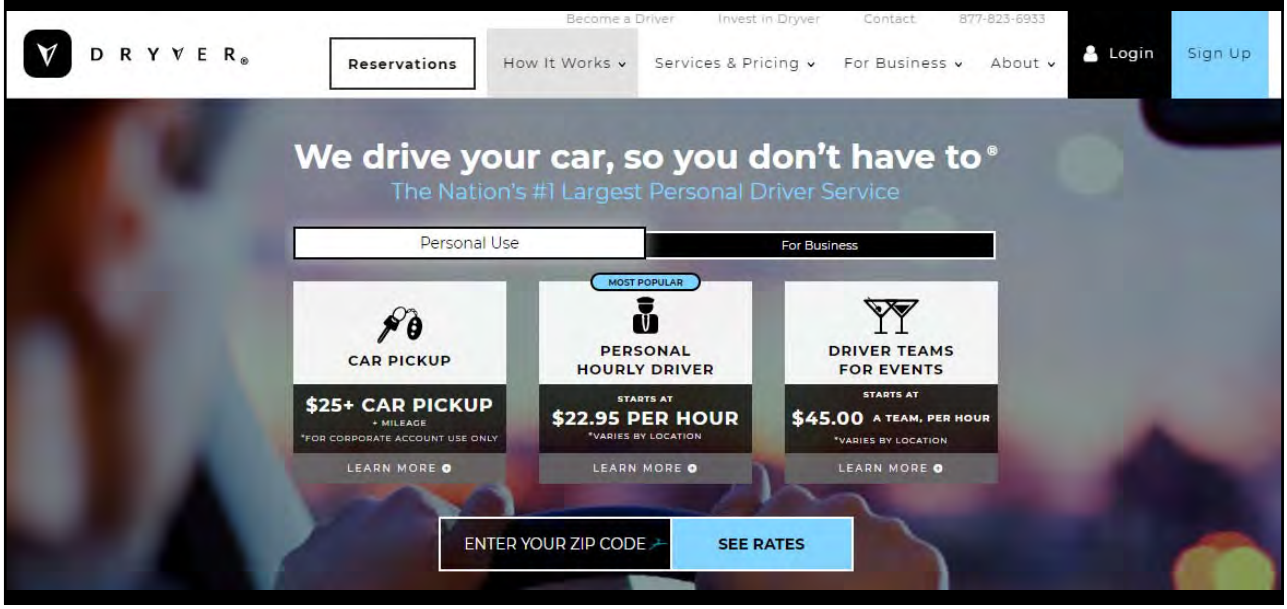


http://tinyurl.com/jyculq6

iExplorer

Export Messages, Photos, Voicemails to your PC

www.dryver.com



Remember These?

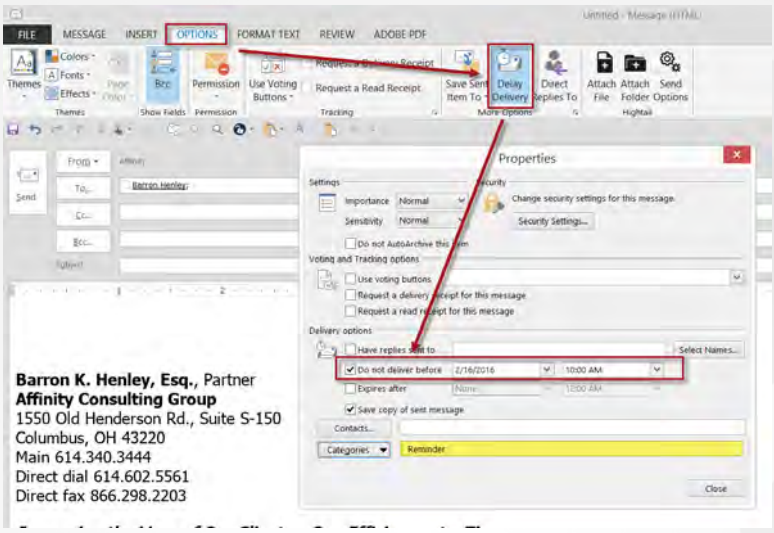
Affinity CONSULTING

Now There's This!

HP Sprocket Portable Photo Printer
$130 – 2" x 3" sticky-back photos

Add filters, borders, stickers and more with HP Sprocket app

Delay Send /Email Yourself Reminders



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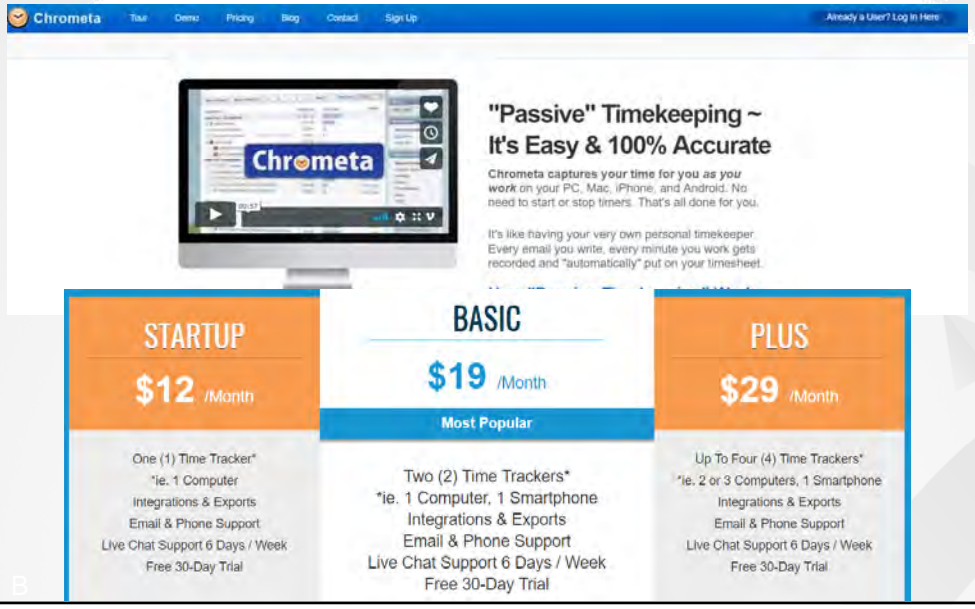
Email Yourself Reminders

- **If you have a Gmail account, you can set future appointments on the calendar with an email reminder (FREE)**
- **See also**
  - **https://www.followupthen.com/**
  - **http://www.memotome.com/**
  - **http://emailfuture.com/**

Chrometa.com



Best USB/Bluetooth Speakerphone

Jabra SPEAK510 USB/BT Speakerphone for Skype, Lync and other VoIP calls - $85

Better Time Tracking

iTimeKeep

(app that links with dozens of accounting & case mgt programs)

iTimeKeep Integrations

iTimeKeep Integrations

- Aderant®
- Amicus®
- CarpeDiem® / TimeKM®
- Coyote
- DTE
- Elite® Enterprise
- Elite® Webview
- Elite® 3E
- Juris® LexisNexis
- LawBase®
- LSS®
- Omega®
- Orion
- PCLaw®
- PerfectLaw
- Practice Management
- ProLaw®
- ProVantage®
- Rippe & Kingston LMS
- TABS3®
- TimeMatters®
- TimeSlips
- Total Office (Former Client Profiles)
- Versys®

B

Best Desktop Scanners

P

Best Desktop Scanners

Fujitsu ScanSnap iX1500 - $420

- 30/60 ppm
- Includes Power PDF Standard
- Scan business cards
- Scan to Word files
- Auto-rotates
- Auto-senses paper size
- Auto-senses color or B&W
- Scan to phone or tablet (wirelessly)
- Scans front & back simultaneously

Affinity CONSULTING

Best Desktop Scanners

Epson ES-400 - $349

- 30/70 ppm
- TWAIN Compliant
- Scan business cards
- Scan to Word files
- Auto-rotates
- Auto-senses paper size
- Auto-senses color or B&W
- Scans front & back simultaneously
- 50 page feeder

Affinity CONSULTING

Fujitsu Fi-7300NX

$1,070

- 60/120 ppm
- 80 sheet feeder
- TWAIN compliant
- Scans duplex
- Auto-deletes blank pages
- Color or B&W
- WiFi & ethernet connectivity
- Touchscreen

Affinity CONSULTING

Bluetooth Talking Glove

Bluetooth Gloves, Wireless Bluetooth Gloves, Winter Gloves Touch Screen with Built-in Stereo Speakers, Removable Headphones, Gifts for Thanksgiving&Christmas

by HIGHEVER

30 ratings | 8 answered questions

Amazon's Choice for "bluetooth gloves"

Price: $21.99 prime FREE One-Day

Pay ~~$21.99~~ $0.00 after using available Amazon Rewards Visa Card Points.

Free Amazon product support included

Color: **grey**

$28.99 prime | $21.99 prime

- URPRISINGLY MUSICAL ENTERTAINMENT: Bluetooth gloves feature latest Bluetooth 4.1 technology and state of the art acoustic components that produce premium sound quality with deep bass and crystal clear treble. A combination of incredible quality acoustic tuning and noise isolation technology allows you to focus on favorite music and answer calls without skipping or missing one word.
- TOUCH-SRCEEN & COLD-RESISTANT: Wireless Bluetooth Gloves with acrylic and polyester

www.beardowear.com

Document Internal Processes!

Snagit for Screen Shots & Instructions ($49)

Camtasia for Screen Recording ($299)

Switch Between Programs

Alt + Tab

Command + Tab

Zoom In and Out

Ctrl + roll mouse scrollwheel up or down

Mac Pro or iMac: Ctrl + scroll up/down with mouse

MacBook: Ctrl + swipe up/down on trackpad

Key Shortcuts

- Windows + E = Windows/file explorer
- Windows + L = lock PC
- Windows + D = Display desktop
- Windows + Pause = system properties
- Windows + R = run dialog box
- Windows = start menu

Herb Scissors

BONUS TIP

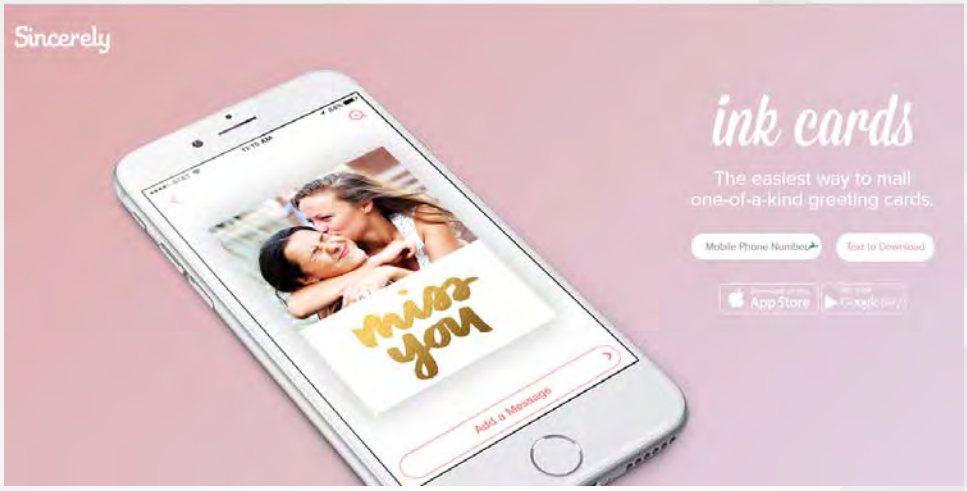
RSVP Herb Scissors - $10

www.vletter.com

A font of your handwriting

Create & Mail Postcard Service

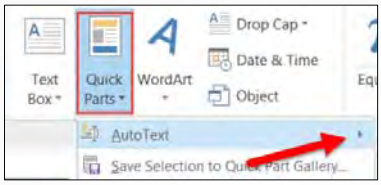
https://sincerely.com/ink - $1.99



AutoText

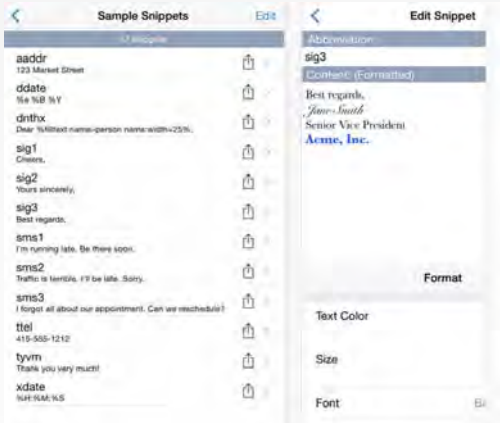
Copy Frequently Used Text

New Email > Insert > Quick Parts > AutoText > Save Selection to AutoText Gallery

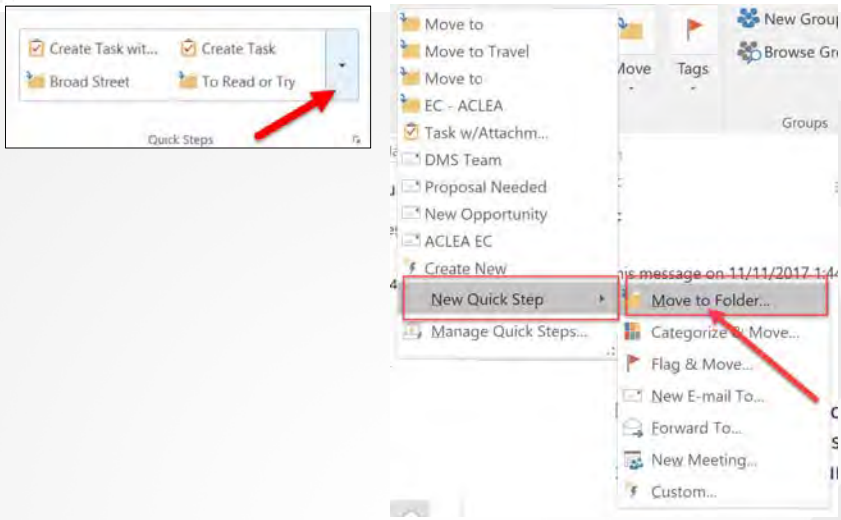


Text Expander

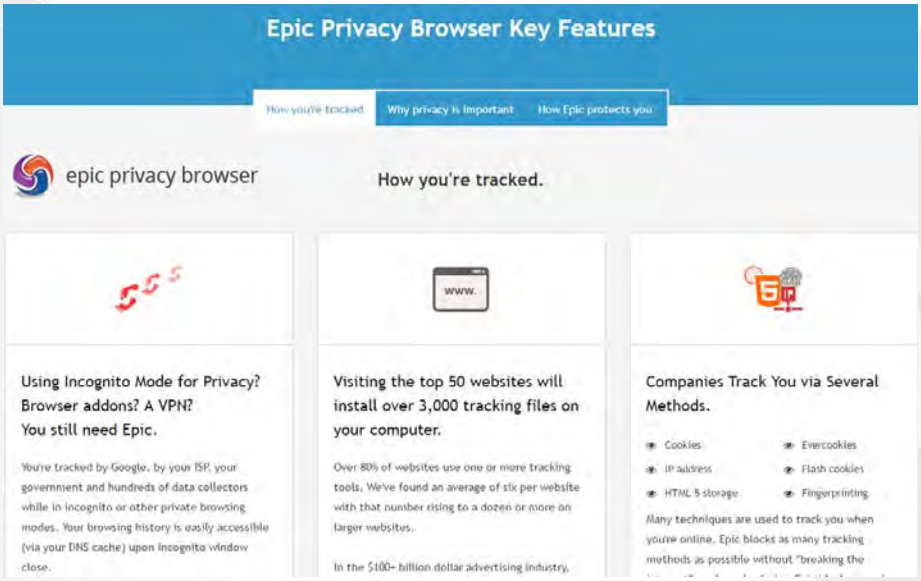
"Autotext" entries on an iPhone/iPad ($4.99)



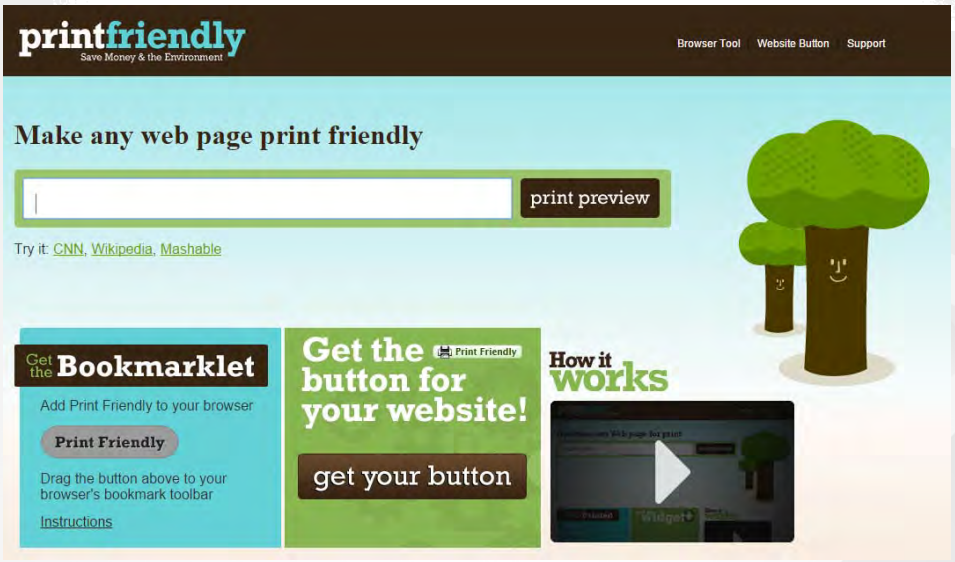
Quick Steps



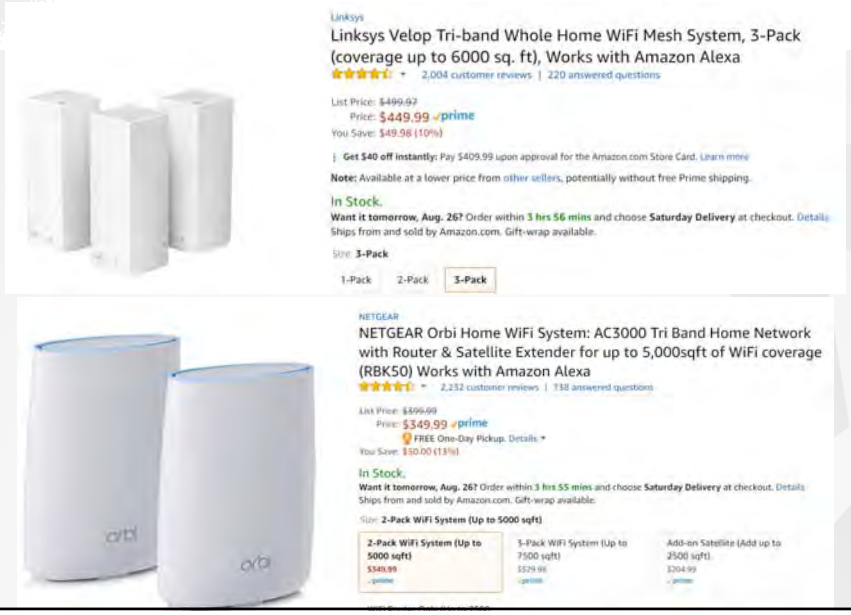
Epic Privacy Browser (free)



www.PrintFriendly.com



No More WiFi Dead Spots



Ring Video Doorbell Pro - $248

Video Doorbell Pro

With a motion-activated camera, two-way audio and brilliant HD video, you'll never miss a visitor again. See, hear and speak to whomever is at your door in real time from your smartphone, tablet or desktop. Day or night, rain or shine—you're always home.

- Ultra-slim design
- 4 interchangeable faceplates
- 1080p wide-angle HD video
- Night vision
- Live View / video on demand
- Two-way talk
- Motion-detection activated
- Customizable alert zones
- Enhanced Wi-Fi connection
- Works on mobile and desktop
- Weather-resistant
- Lifetime purchase protection
- Requires existing hardwired doorbell

View larger

Cloud Video Recording

Optional cloud recording lets you download and share the moments that matter the most.

Smart Light Switches

Roll over image to zoom in

GE Z-Wave Wireless Smart Lighting Control Smart Switch, On/Off, In-Wall, Includes White & Light Almond Paddles, Works with Amazon Alexa / Google Home, 12722

2,290 customer reviews | 1000+ answered questions

Price: $36.85 Prime

In Stock.

Want it tomorrow, March 2? Order within 3 hrs and choose **One-Day Shipping** at checkout. Details

Ships from and sold by Amazon.com. Gift-wrap available.

Style: **In-Wall Paddle Switch**

Add-On Toggle Style Switch $19.50	In-Wall 1000W Paddle Dimmer $44.99	In-Wall Outlet $38.74
In-Wall Paddle Dimmer $39.50	In-Wall Paddle Fan Control $44.50	**In-Wall Paddle Switch $36.85**
In-Wall Toggle Dimmer $39.88	Add-On Paddle Switch $19.50	

Amazon Certified

works with amazon alexa — Control this product with your voice through any Alexa device.

- The switch enables you to wirelessly control to turn lights on and off, schedule a timed event or create a custom scene from anywhere in the world, at any time of the day.

Smart Locks

Schlage Lock Company

Schlage BE469 CEN619 Touch Deadbolt Built-In Alarm w/ Latitude Interior Lever - Satin Nickel

Be the first to review this item

Price: $299.00 Prime

In Stock.

Want it Monday, March 6? Order within **22 hrs 43 mins** and choose **Two-Day Shipping** at checkout. Details

Ships from and sold by aSavings.

Size: **Century**

Camelot | Century

Color: **Satin Nickel**

- Applications: Residential single family doors
- Certifications: Grade 1 ANSI/BHMA certified
- Keying: 5-pin tumbler, C Keyway, 1 key included
- Door range: 1-3/8" to 1-3/4" (35mm-44mm) standard
- Operating Temperatures: Outside escutcheon: -35C to 66C, Inside escutcheon: -10C to 49C

› See more product details

Compare with similar items

New (1) from $299.00 & FREE shipping

Honeywell Smart Thermostat

Roll over image to zoom in

Honeywell

Honeywell Smart Thermostat, Wi-Fi, Touchscreen, Works with Amazon Alexa

2,499 customer reviews | 1000+ answered questions

List Price: $206.99

Price: $158.95 Prime

You Save: $50.04 (24%)

In Stock.

Want it Friday, March 3? Order within **22 hrs 6 mins** and choose **One-Day Shipping** at checkout. Details

Sold by Tiger Deals and Fulfilled by Amazon. Gift-wrap available.

Service: **Get professional installation** Details

Item only | Include installation +$116.29

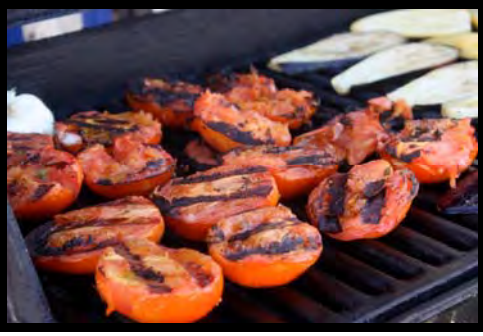
› See more

Amazon Certified

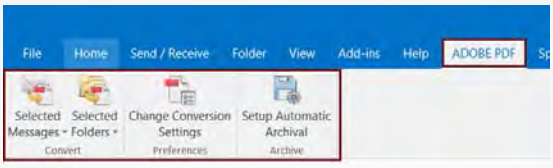
works with amazon alexa — Control this product with your voice through any Alexa device

- Works with Amazon Alexa for voice control (Alexa device sold separately)
- Customize the screen color to match any decor. Control from anywhere with IOS and Android devices. Simple setup with smart programmable features for home or business
- Energy Savings: Choose programmable mode to save on annual heating and cooling costs. C-wire needed for proper installation
- Locking Touchscreen: Advanced locking features and password options provide smart security and convenience
- Allows remote access to the thermostat through a computer, tablet, or smart phone with Honeywell's Total Connect Comfort Service
- Check to see if your new thermostat qualifies for a utility rebate. Enter your zip or postal code on yourhome.honeywell.com/rebates for available rebates

Some Vegetables Taste Better Burnt



PDF Outlook Integration



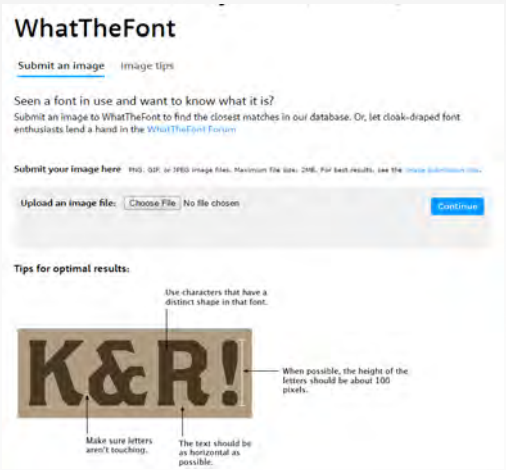
MightyText for Android

Affinity CONSULTING

http://www.myfonts.com/WhatTheFont/

Want to know what font someone is using? Upload an image and find out!

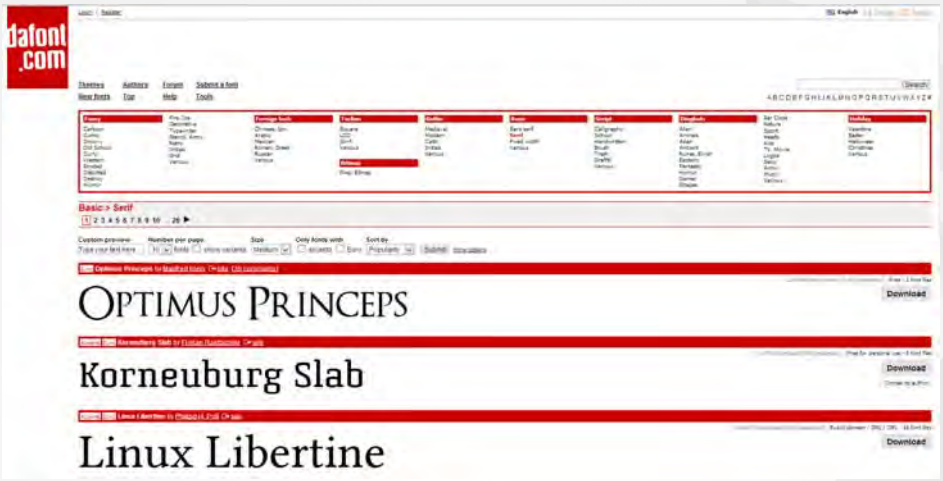
BONUS TIP



Affinity CONSULTING

www.dafont.com

Get a custom font for your firm

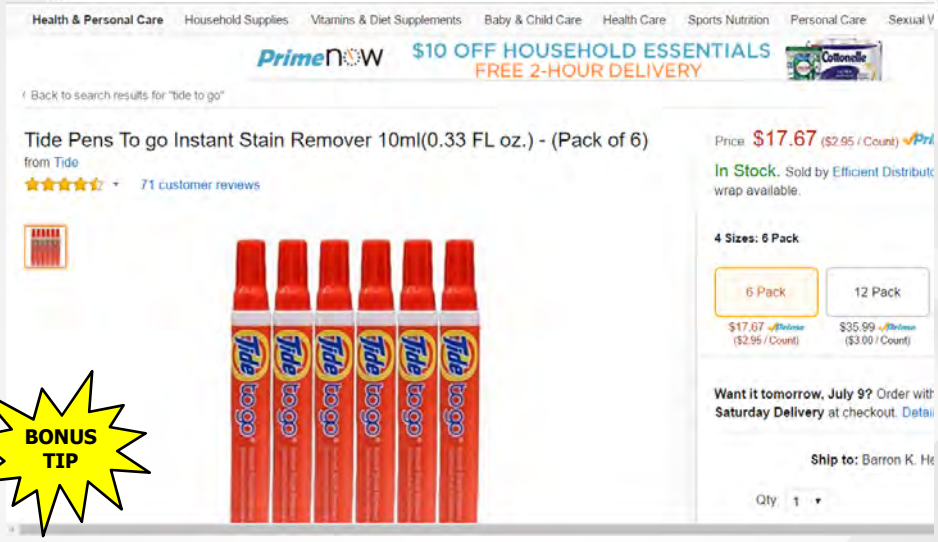


Duplicate File Cleaner

Windows

Mac

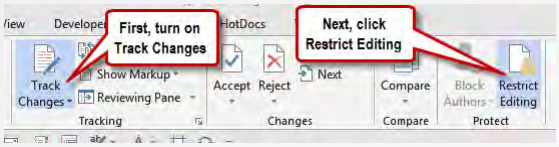
Never Leave Home Without Them

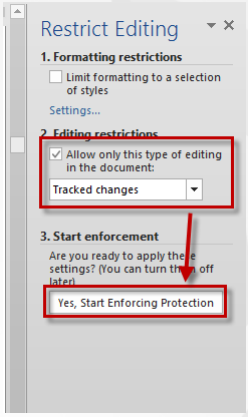


Hidden Safe Ideas

Word Tip

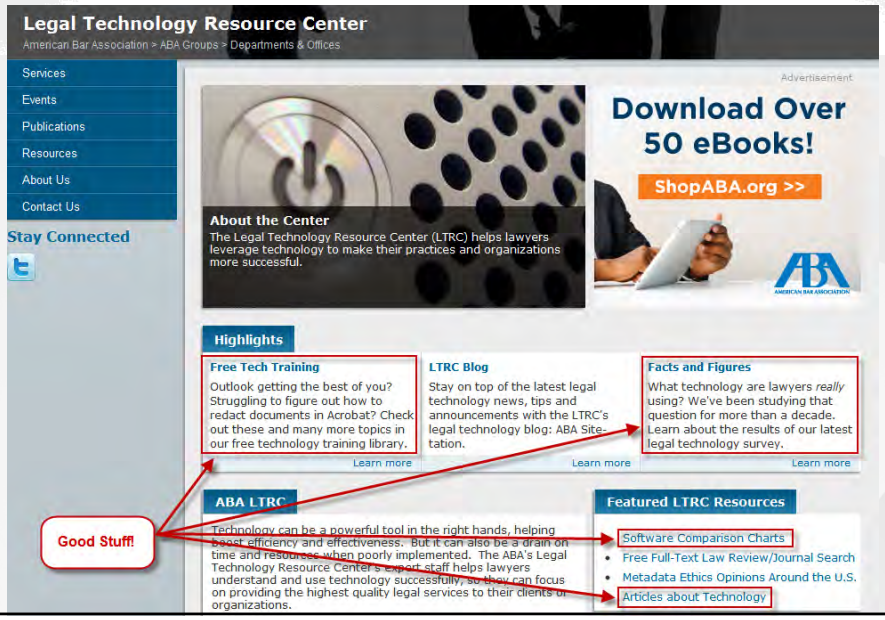
Lock on track changes in Word





This prevents the person you send the document to from turning it off and making changes

ABA Legal Technology Resource Center



Computer Rearview Mirror

$17 – amazon.com

No more surprise visitors

Treadmill Desk

$1,299 @ amazon.com

Desk Cycle

- **$159 - Amazon**

Affinity CONSULTING

Taking things too far?

Affinity CONSULTING

Time for a Power Nap!

VIVA OFFICE Recliner Office Chair - $399

Security System with Camera

Netgear Arlo Pro Security System with Siren – 1 Rechargeable Wire-Free HD Camera with Audio, Indoor/Outdoor, Night Vision (VMS4130) - $220 (you can add up to 6 cameras)

Easy and Powerful Security Camera

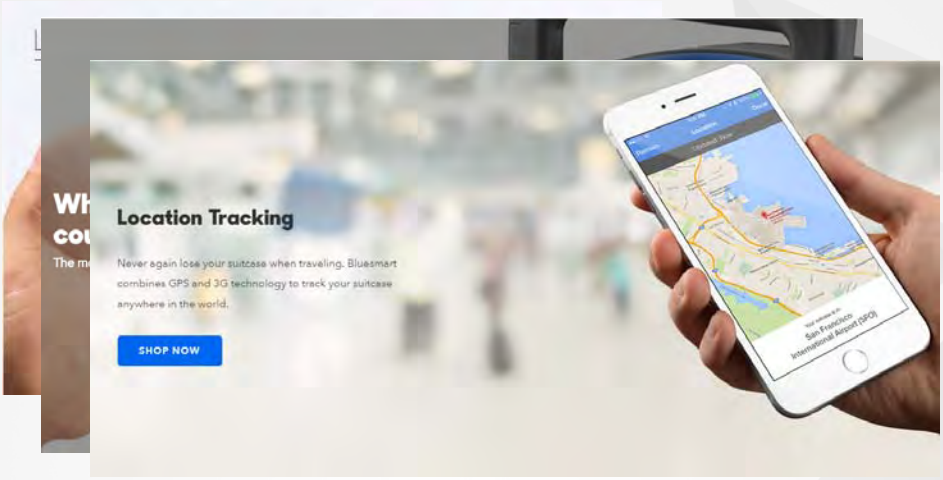
Vimtag VT-361 - $60

- **Super HD WiFi**
- **Pan/Tilt**
- **Two-Way Audio**
- **Night Vision**

Affinity CONSULTING

Smart Luggage!

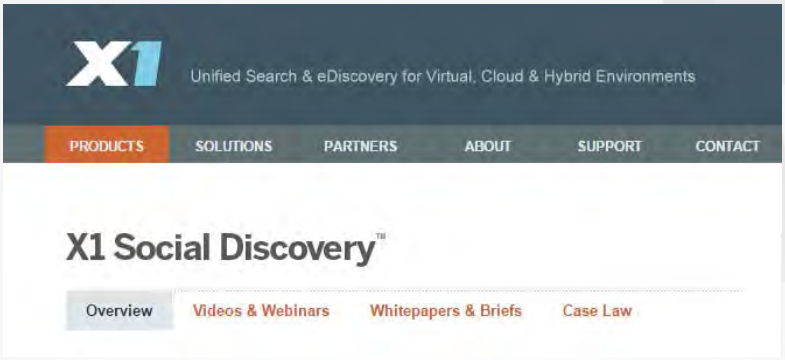
www.bluesmart.com - $549



Affinity CONSULTING

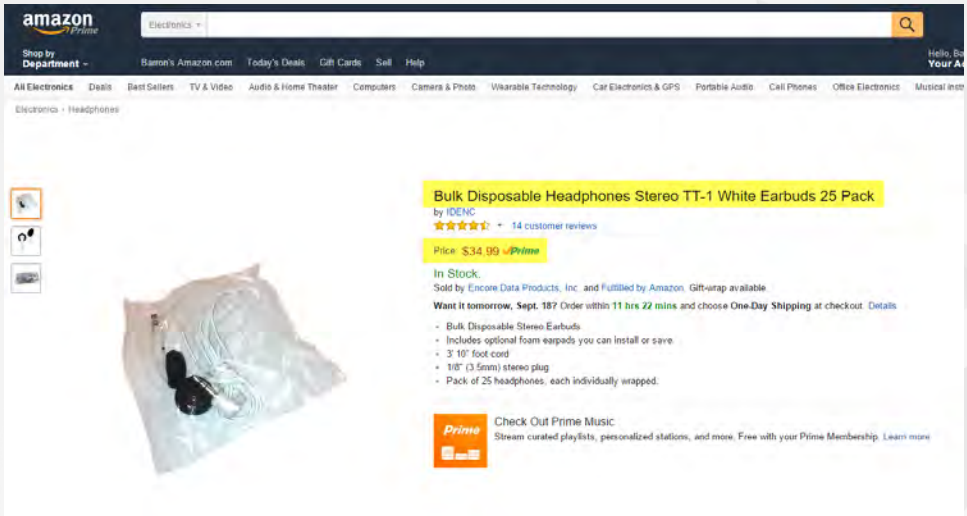
X1 Social eDiscovery

- **www.x1.com**
- **Research & Capture Social Media**



Affinity CONSULTING

Tired of Listening To Other People's Tablets & Phones?



Affinity CONSULTING

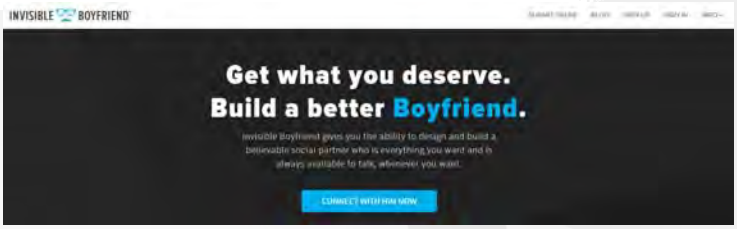
Paper Karma

Aqua Notes

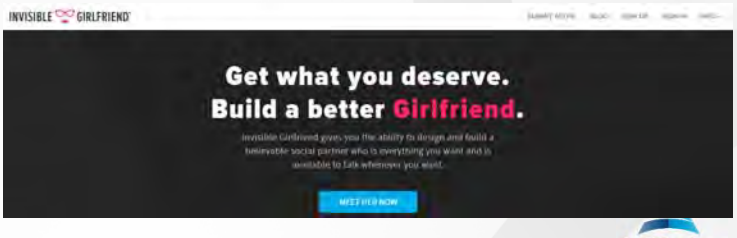
www.myaquanotes.com - $7

When You Need a Boy/Girl Friend

www.invisibleboyfriend.com



www.invisiblegirlfriend.com



Affinity CONSULTING

Clever Chef Handy Sealer

- **$23 for 2 pack**
- **USB rechargeable lithium ion batteries**

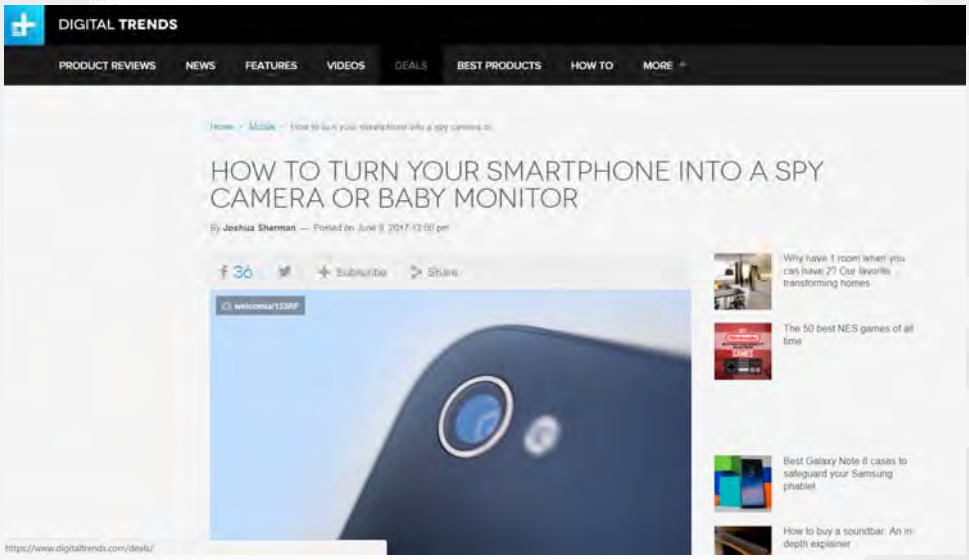
Before

After

BONUS TIP

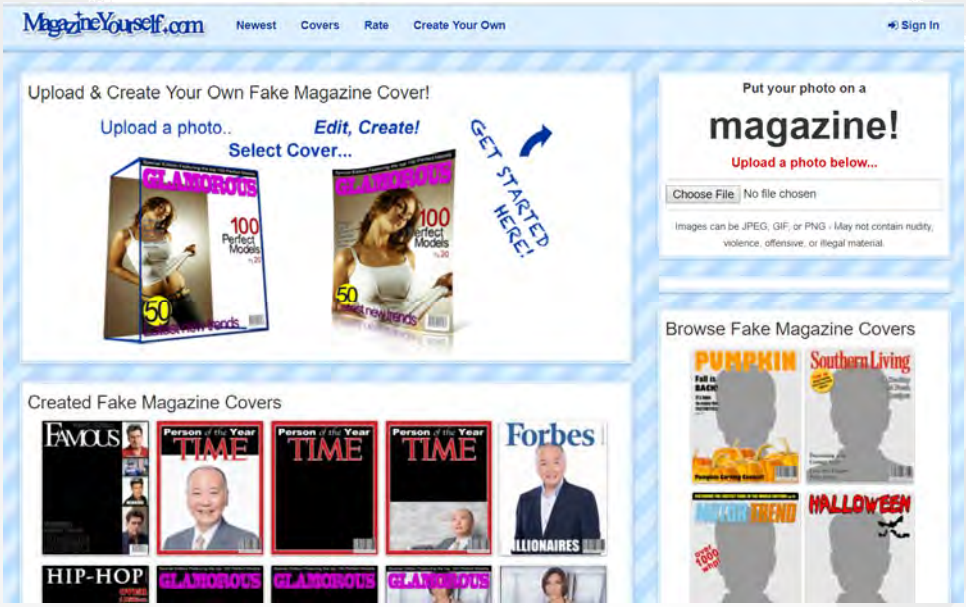
Affinity CONSULTING

What To Do With Old Smartphones



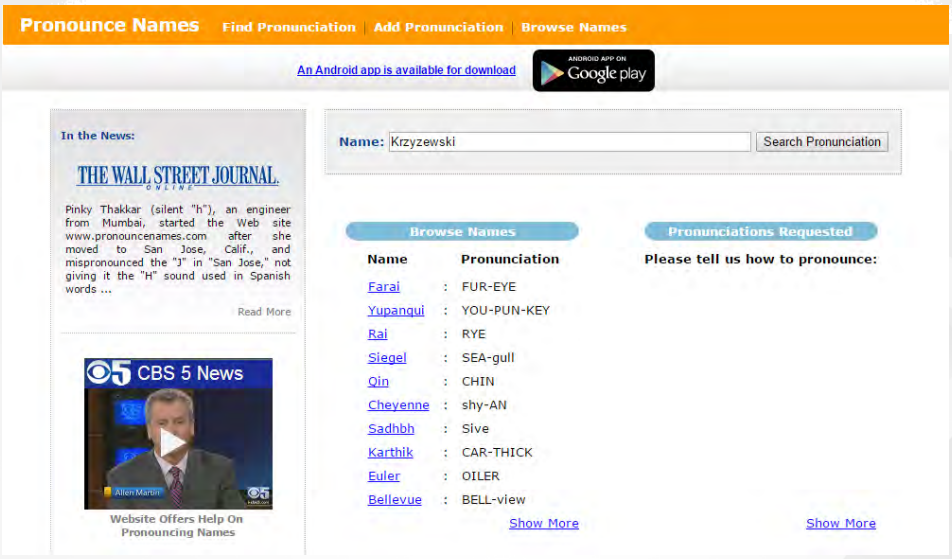
Cups for Your Next Party

How To Get Your Face on Time Magazine



Affinity CONSULTING

www.pronouncenames.com



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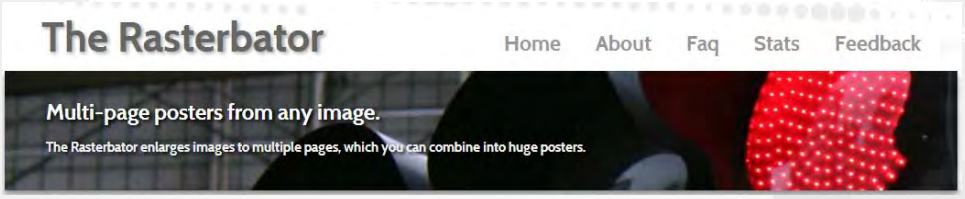
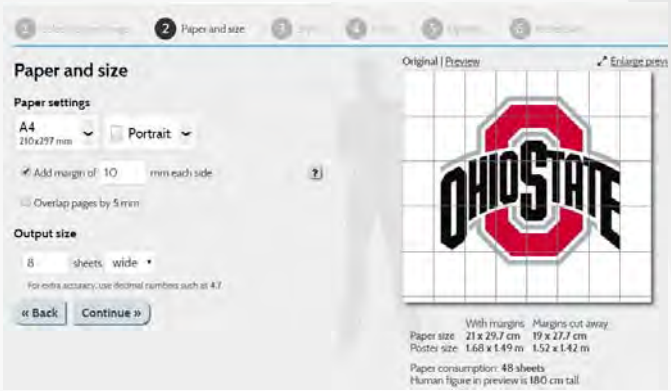
Jelly Bean Roulette

$8 from amazon.com - Is it licorice or skunk spray?
Strawberry jam or dirty socks?

Affinity CONSULTING

www.Rasterbator.net

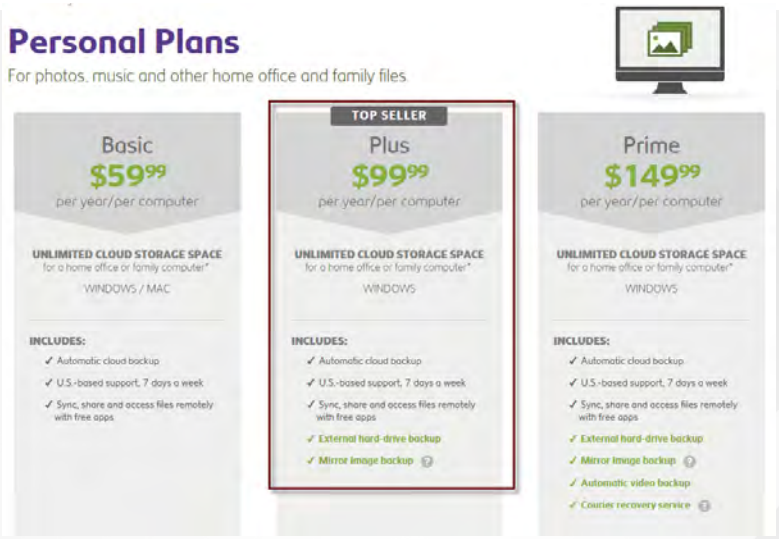




Affinity CONSULTING

Favorite Backup

CARBONITE™
THE BETTER BACKUP PLAN



Affinity CONSULTING

www.happyhourvirus.com

x

BONUS TIP

Step 1
Tell your friends you're leaving work

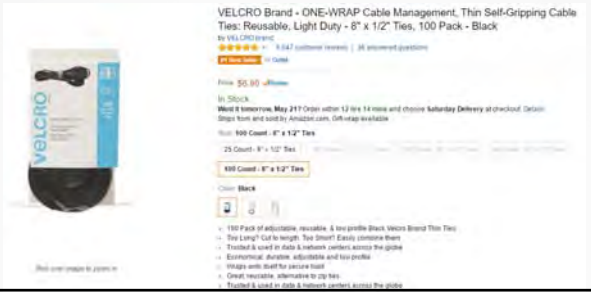
Step 2
Select a screen mode to "break" your computer

Step 3
Make frustrated sigh. Exit building

BB

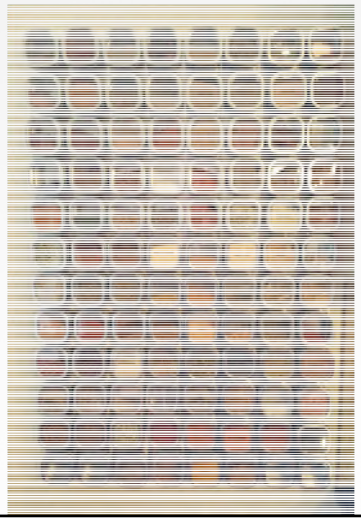
Affinity CONSULTING

Love These Things



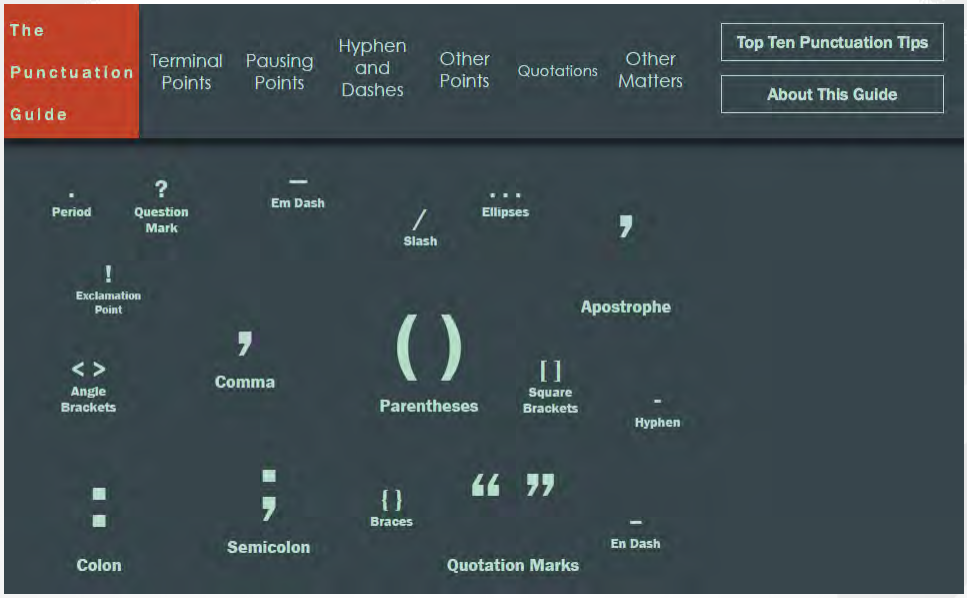
Have Too Many Herbs & Spices?

www.custommagneticspicerack.com

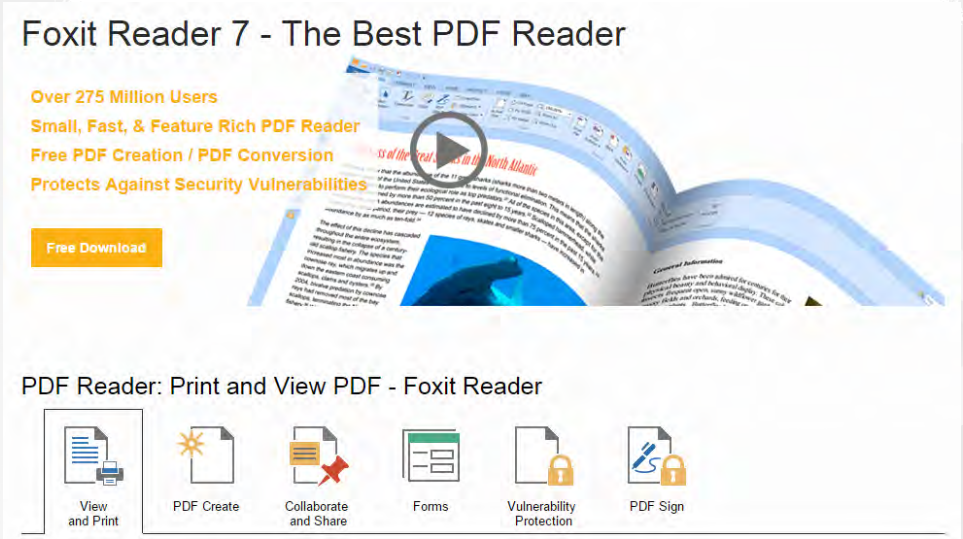


Track Your Sent Email

www.thepunctuationguide.com



Best Free PDF Creator



Pruner You'll Pass Down to Heirs

Joseph Joseph Large Chop2 Pot Plus Folding Chopping Board

- $20

Best USB/Bluetooth Speakerphone

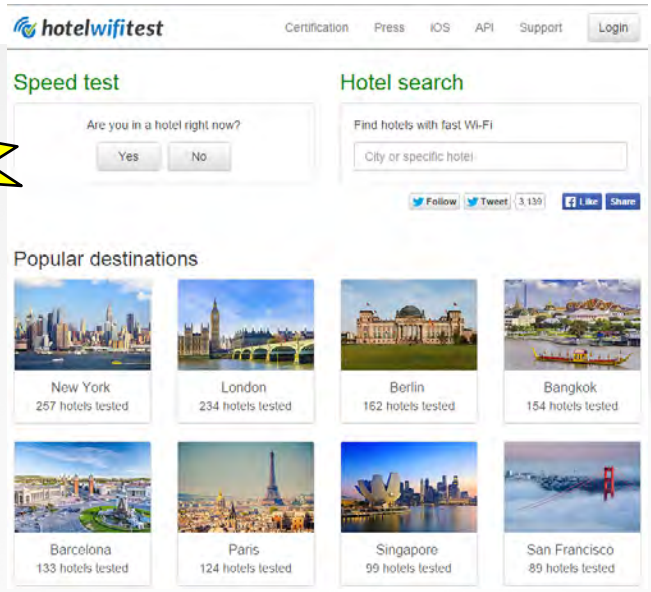
Jabra SPEAK510 USB/BT Speakerphone for Skype, Lync and other VoIP calls - $85

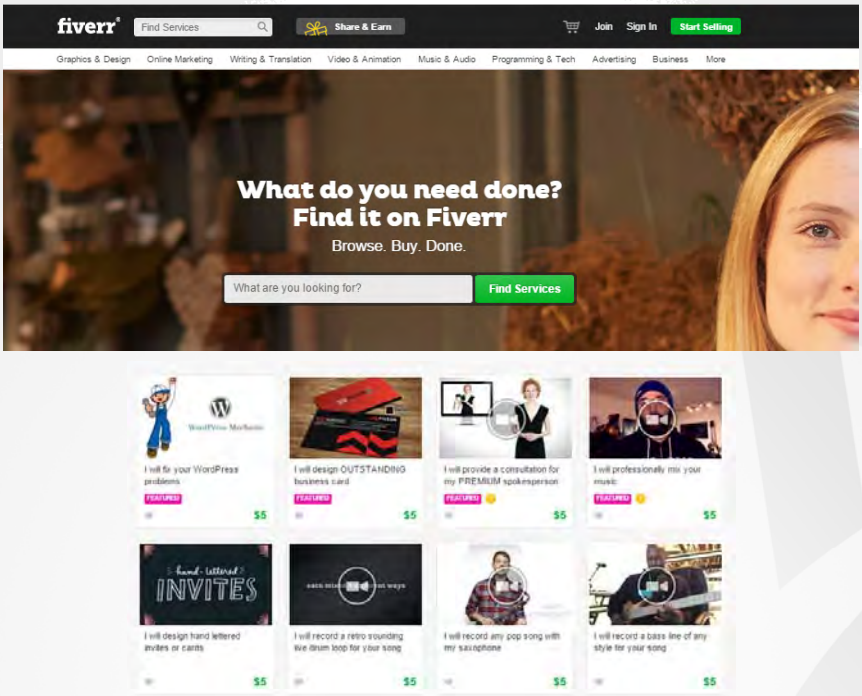
Properly Wipe Drives

Dban (free), Cybercide ($30), Killdisk ($80)

www.hotelwifitest.com

BONUS TIP





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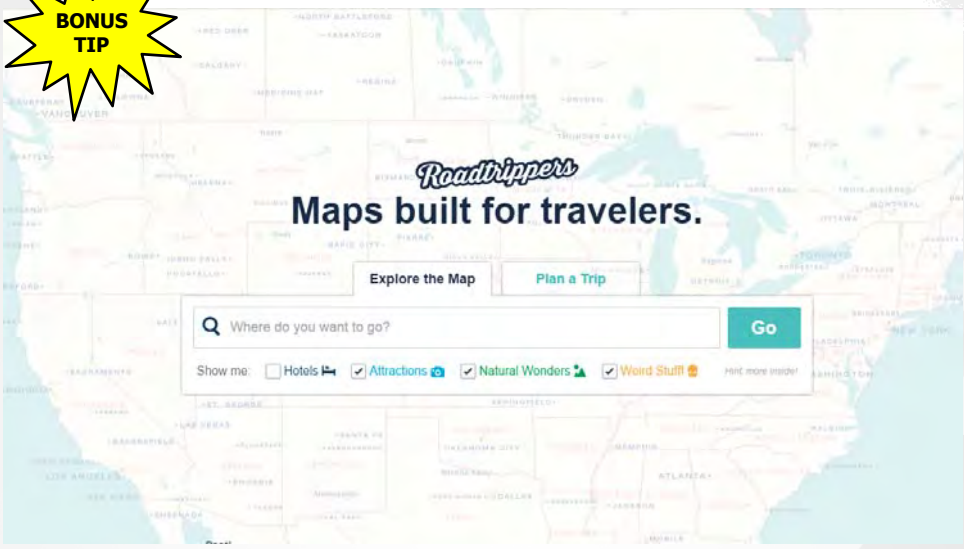
www.RoadTrippers.com

BONUS TIP



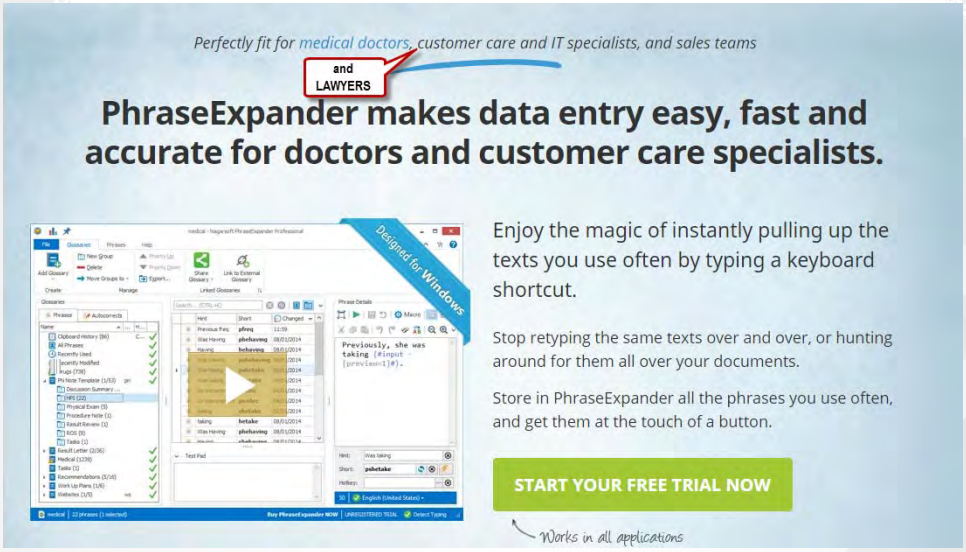
Affinity CONSULTING

www.Despair.com

BONUS TIP

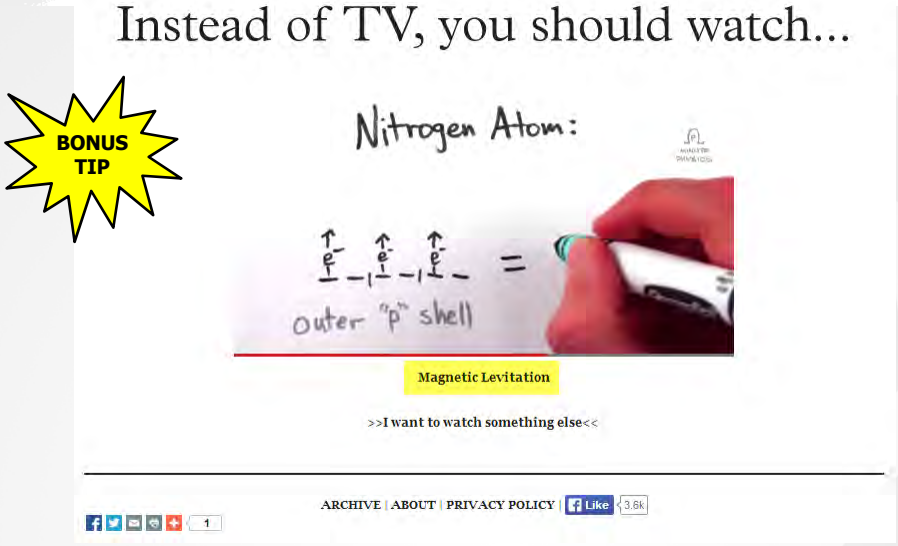
Affinity CONSULTING

PhraseExpander.com



Affinity CONSULTING

www.unplugthetv.com



www.lawyertechreview.com

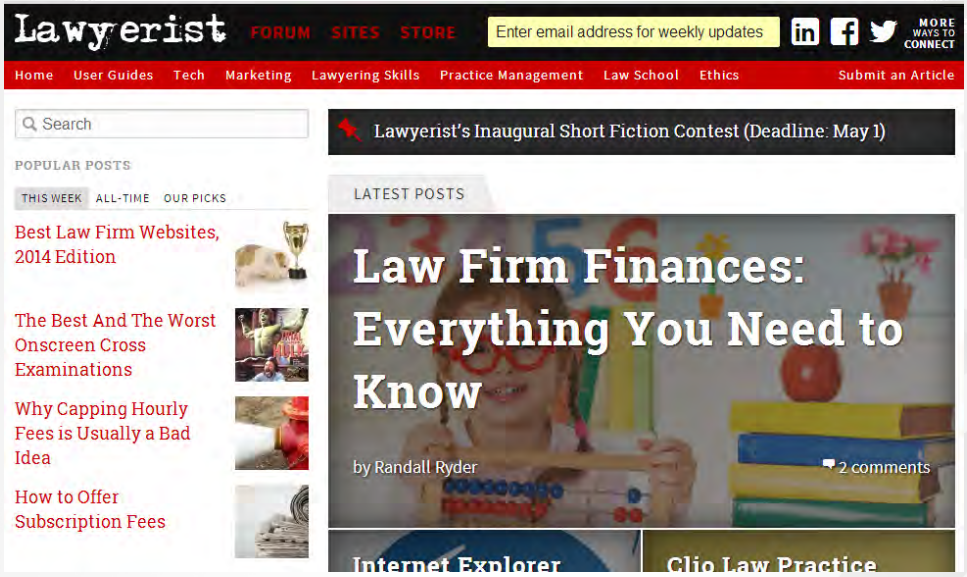
Legal Adobe Acrobat Resources

- http://blogs.adobe.com/acrolaw

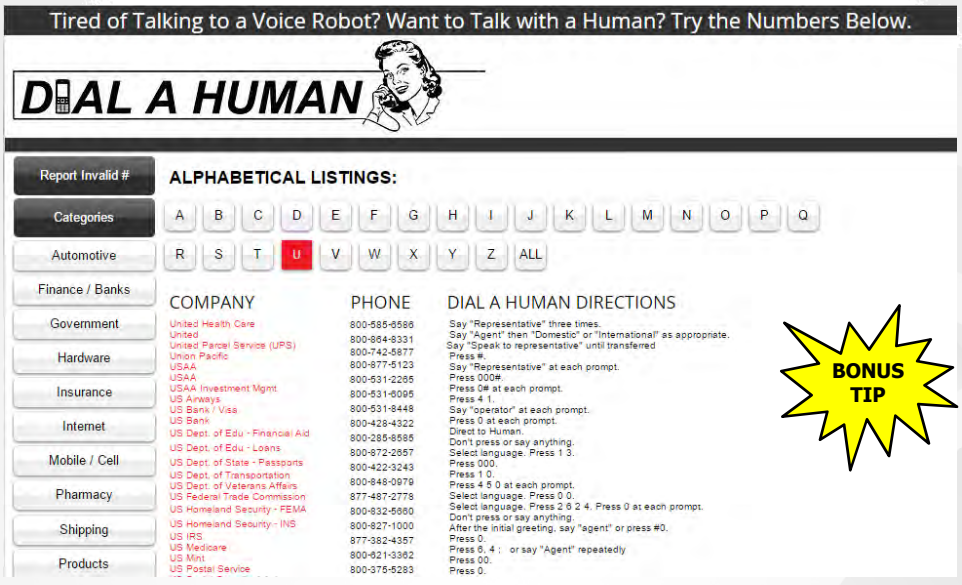
- http://www.planetpdf.com

www.somethingstore.com

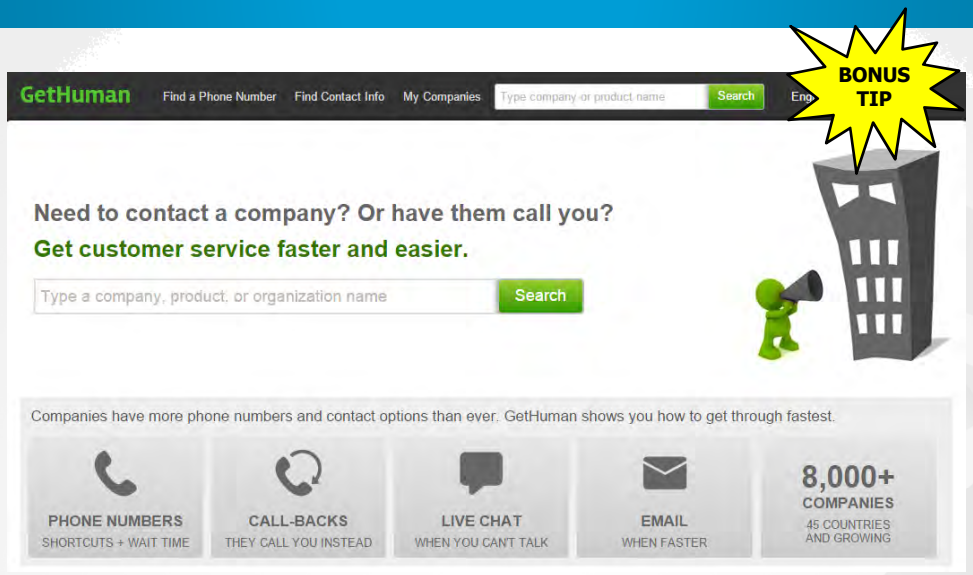
www.lawyerist.com



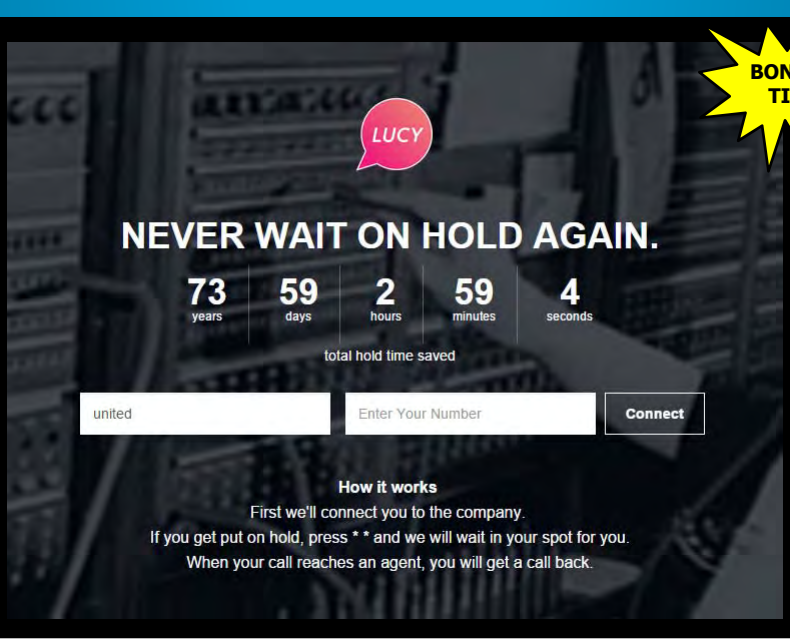
www.DialAHuman.com



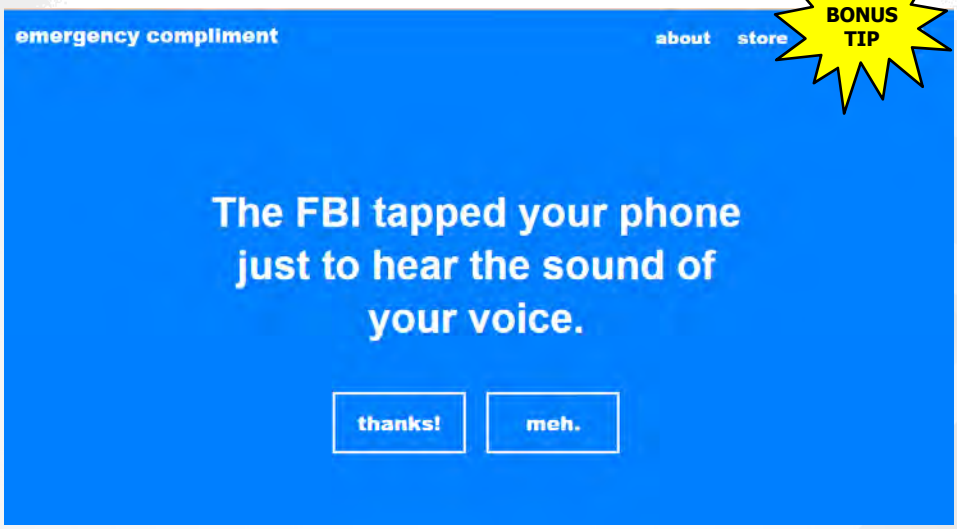
www.GetHuman.com



www.LucyPhone.com

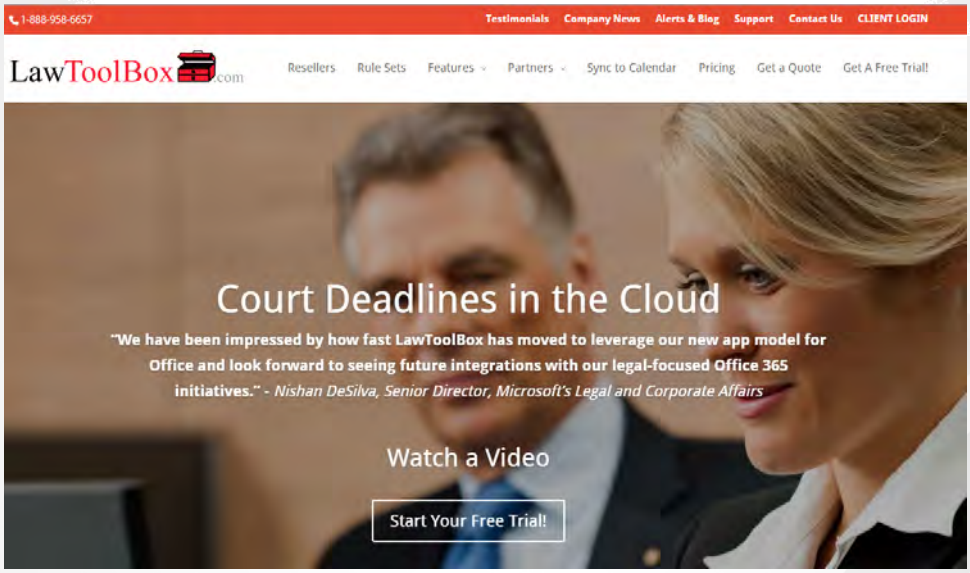


www.emergencycompliment.com



Affinity CONSULTING 24

Rules Based Docketing



Affinity CONSULTING 25

When You Need To Tune Out

- http://rain.simplynoise.com/ x

BONUS TIP

simplyrain

- http://www.simplynoise.com/
  - White, pink & brown noise
  - Sleep timer

simplynoise

Affinity 26

coffitivity (beta)

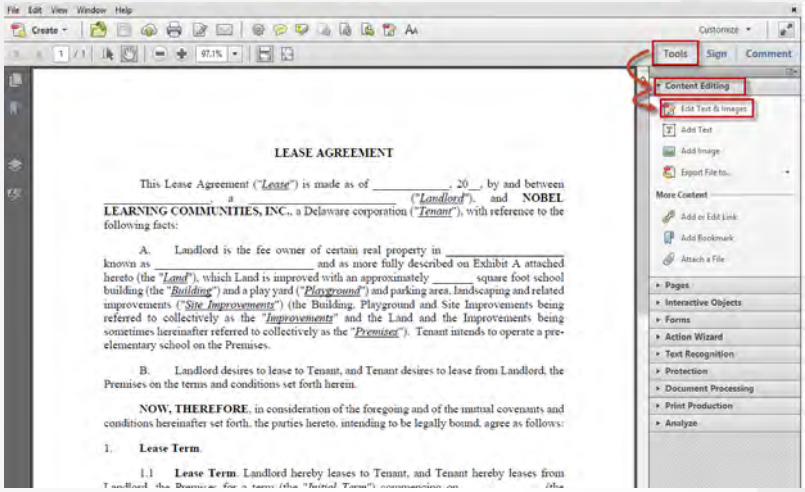
BONUS TIP

www.coffitivity.com – Coffee shop noise

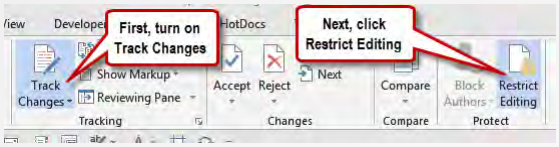
Affinity 27

Protect Your PDFs

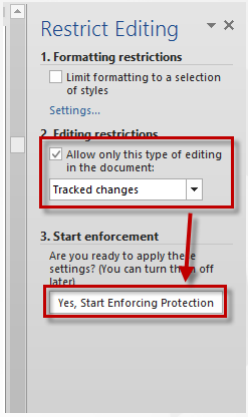
If you don't lock PDFs, they're easy to edit



Lock On Track Changes in Word

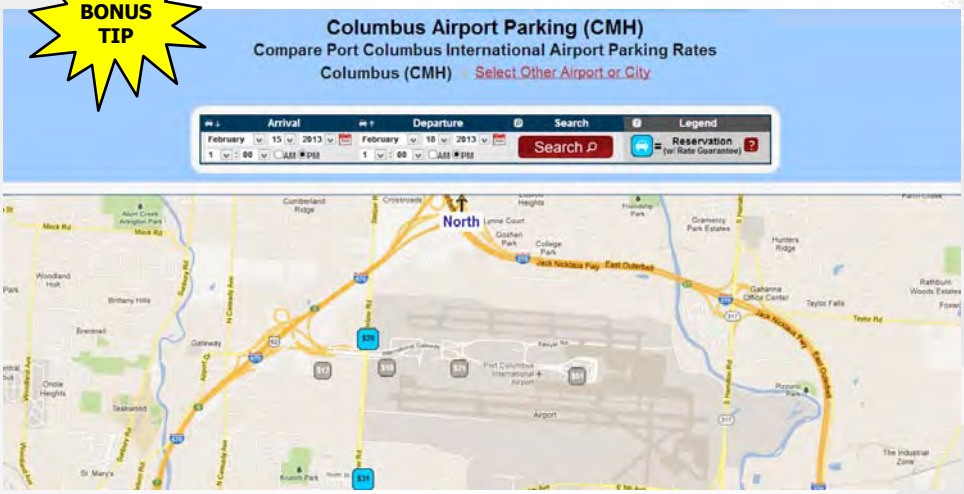


This prevents the person you send the document to from turning it off and making changes



www.bestparking.com

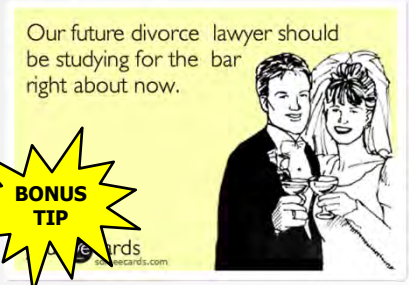
BONUS TIP

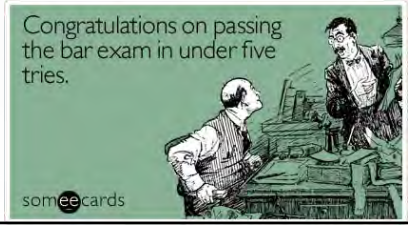


www.someecards.com

Rude, crude and socially unacceptable e-cards

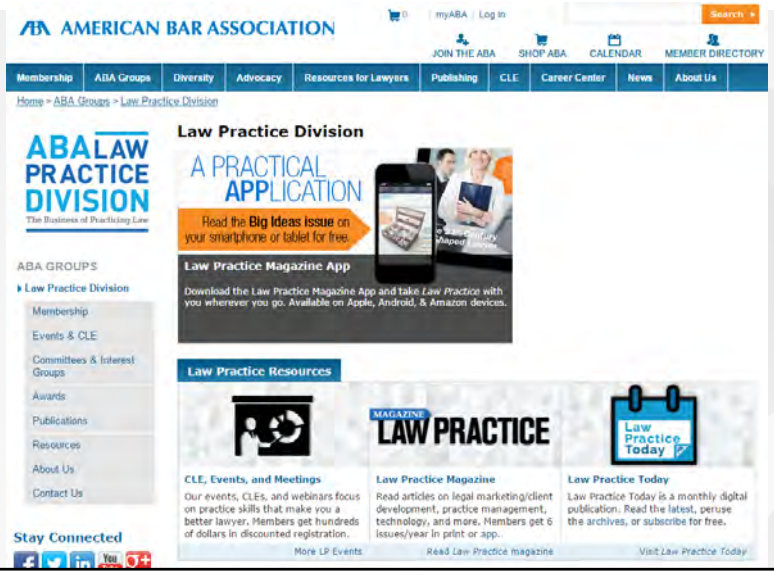
BONUS TIP





ABA Law Practice Division

http://tinyurl.com/lvehk3x



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- **Get documents executed electronically**
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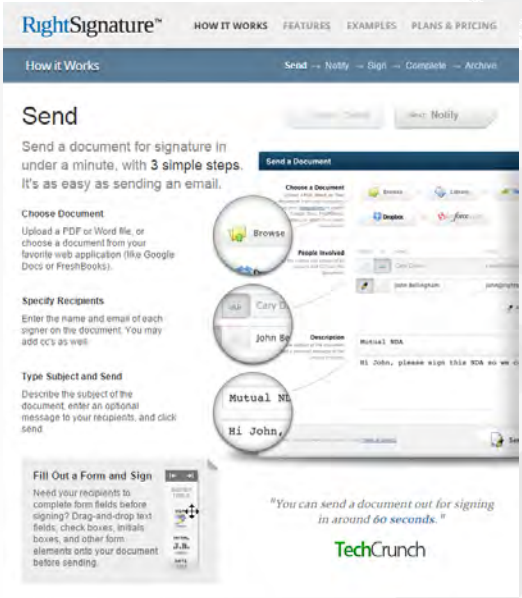
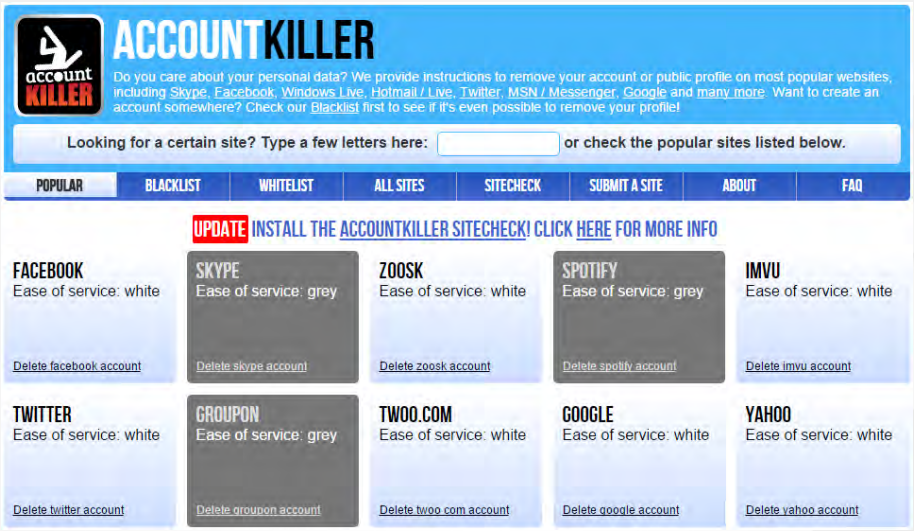


www.mypermissions.com

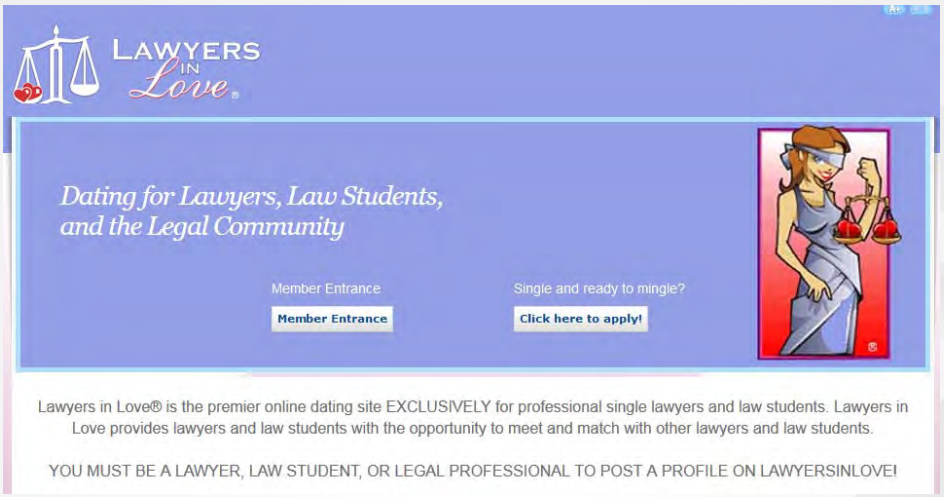
DF

Wipe Out Online Accounts

www.accountkiller.com



www.lawyersinlove.com



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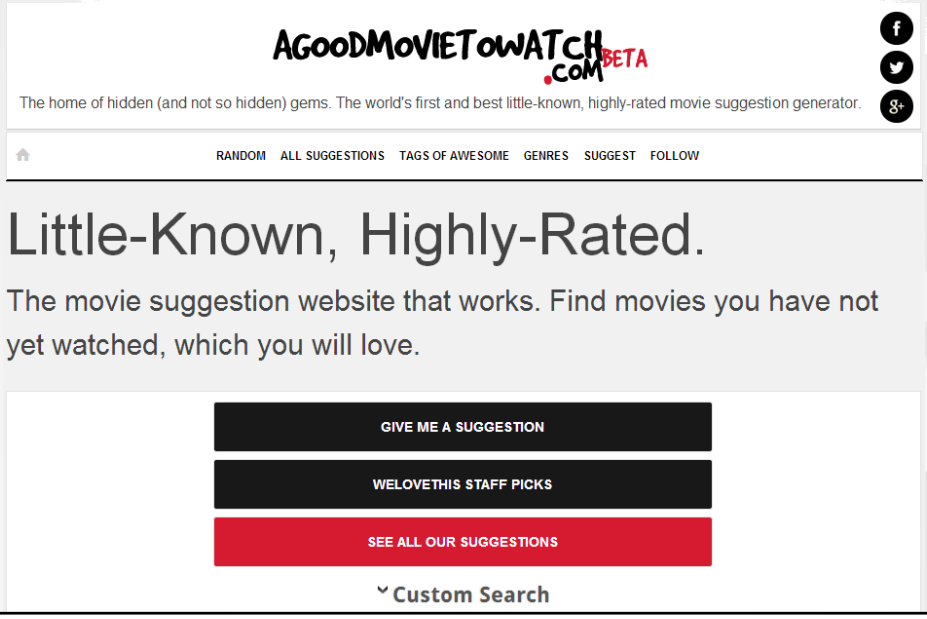

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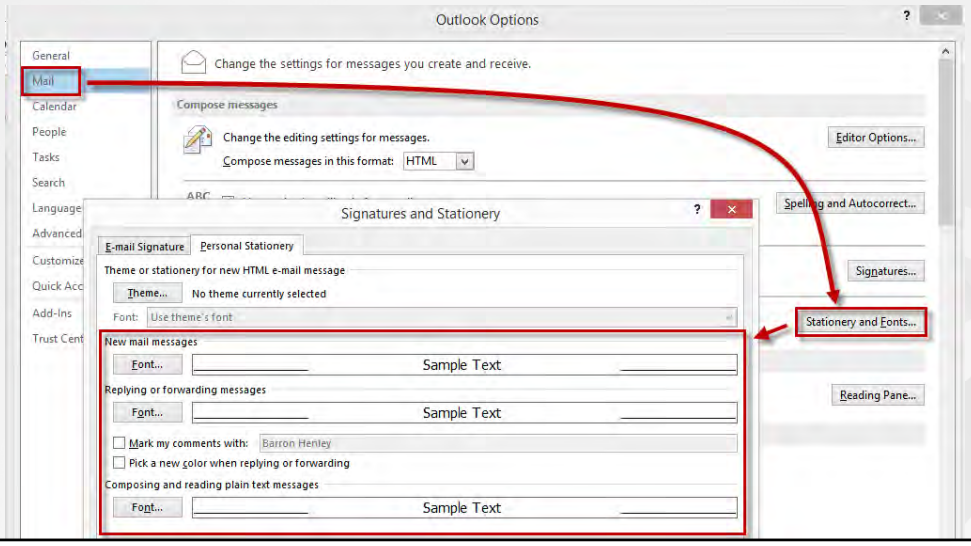
$35

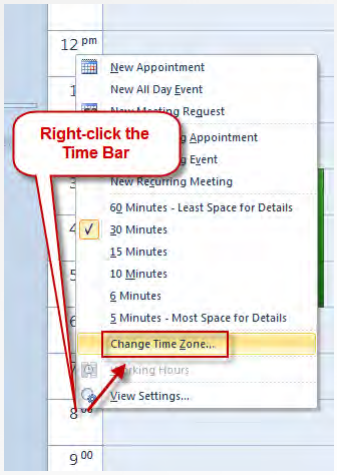
Outlook Tips

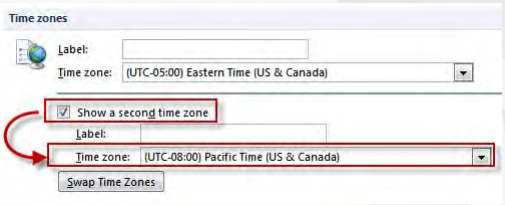
Fix your fonts! File ⇨ Options ⇨ Mail



Outlook Tips

Show 2 time zones on your calendar





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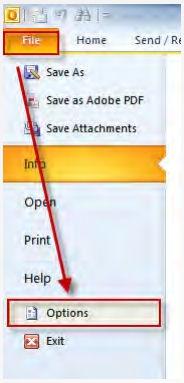
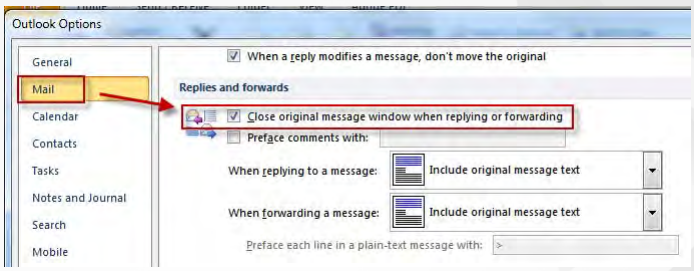
Outlook Tips

Auto-close the message window after you reply





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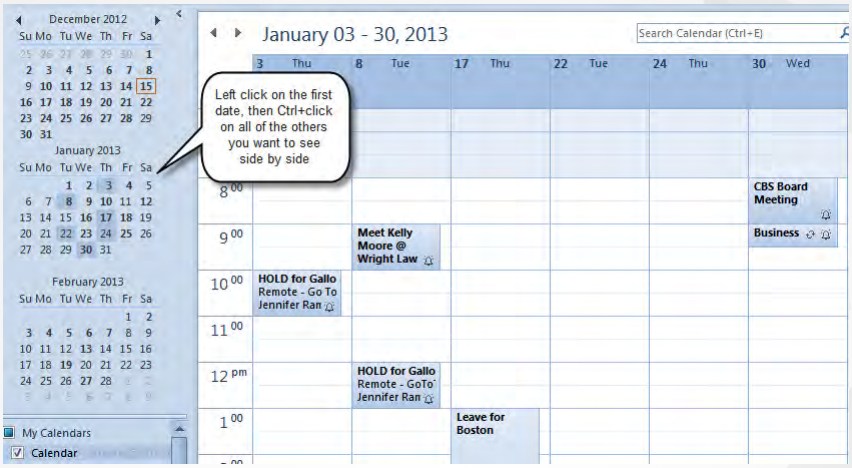
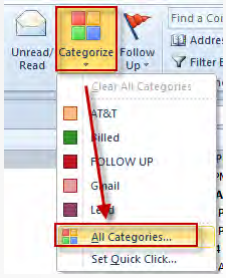
Outlook Tips

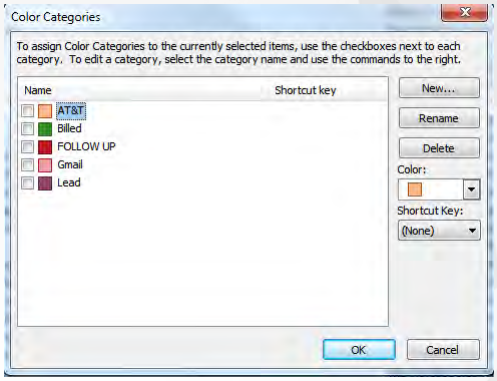
See non-contiguous dates side-by-side



Outlook Tips

Create a billed category for your calendar





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$249 on www.amazon.com

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Hands-Free Equipment

- **Wine Yoke - $7**

- **BeerNeck - $10**

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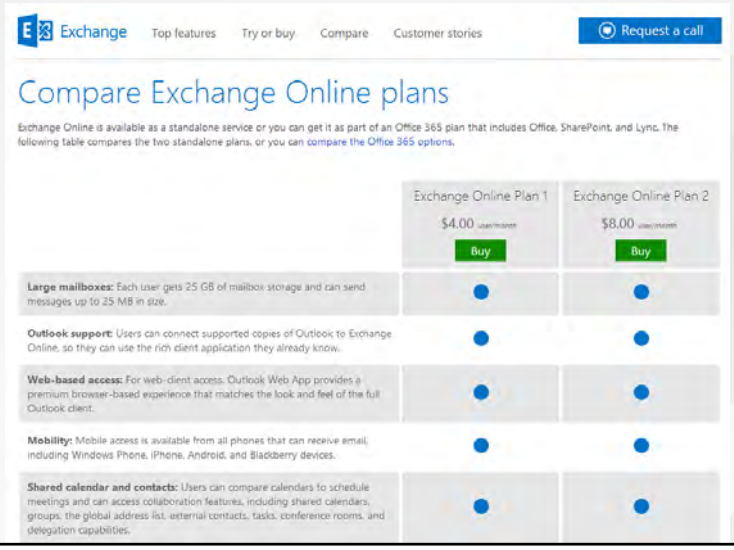
The List of Android Apps for Lawyers

Application Name	Application Cost	Short Description of the Application	Google Play Link
Law Practice	$4.99 - $19.99	The Law Practice magazine app is your mobile guide to the business of practicing law. Law Practice magazine is the premier practice management resource dedicated to helping legal professionals master the four core areas of a successful law practice.	https://play.google.com/store/apps/details?id=com.texterity.android.LawPractice
Procurement Explorer	$0.00	Procurement Explorer is a guide to Polish procurement law in the form of an English-language mobile app. It offers practical answers to questions from this extensive field of law.	http://goo.gl/EYI7K
LSUC Ontario Reports	$0.00	Law reports from Ontario provided weekly. Also official Law Society notices, government notices of interest to the profession, fee schedules, lawyers' announcements, career opportunities and advertising.	http://goo.gl/LSJI2
iJuror	$15.00	Jury selection assistant.	http://goo.gl/j2NMK
Law School Dojo	$0.00	A law quiz game for the law student that lives in everyone. Hundreds of multiple choice questions to learn legal doctrine, vocabulary, and procedure, along with random legal trivia.	http://goo.gl/441Fr
Law Dictionary	$0.99	The Law Dictionary is a source of legal definitions and terms featuring the entire Black's Law Dictionary (2nd edition) with over 15,000 words and definitions.	http://goo.gl/J7q6G

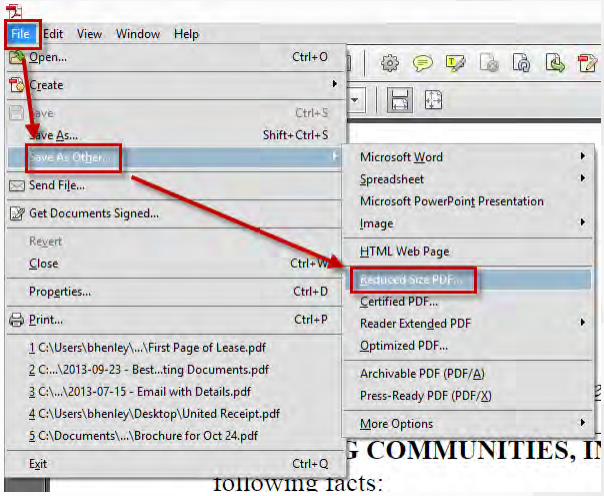
Hosted Exchange Almost Free

http://tinyurl.com/bleasx7



Shrinking PDF File Sizes

- **PDF too big to email?**
- **Shrink it!**



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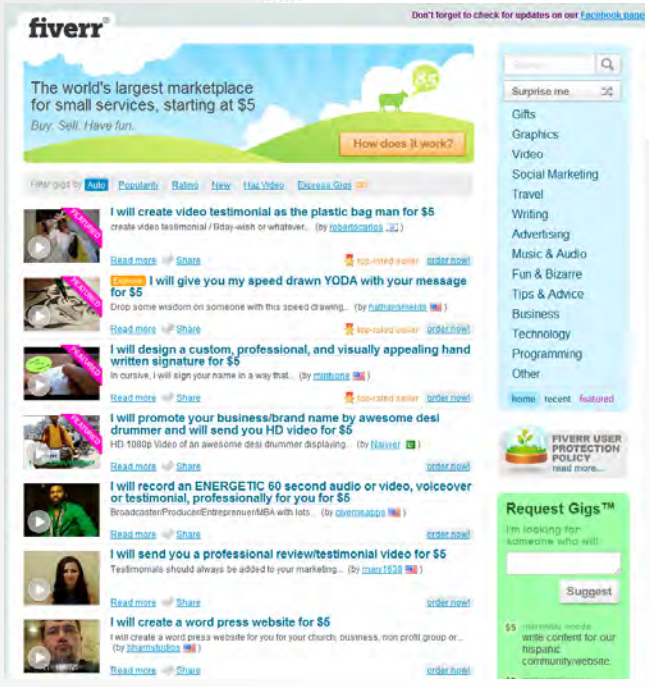

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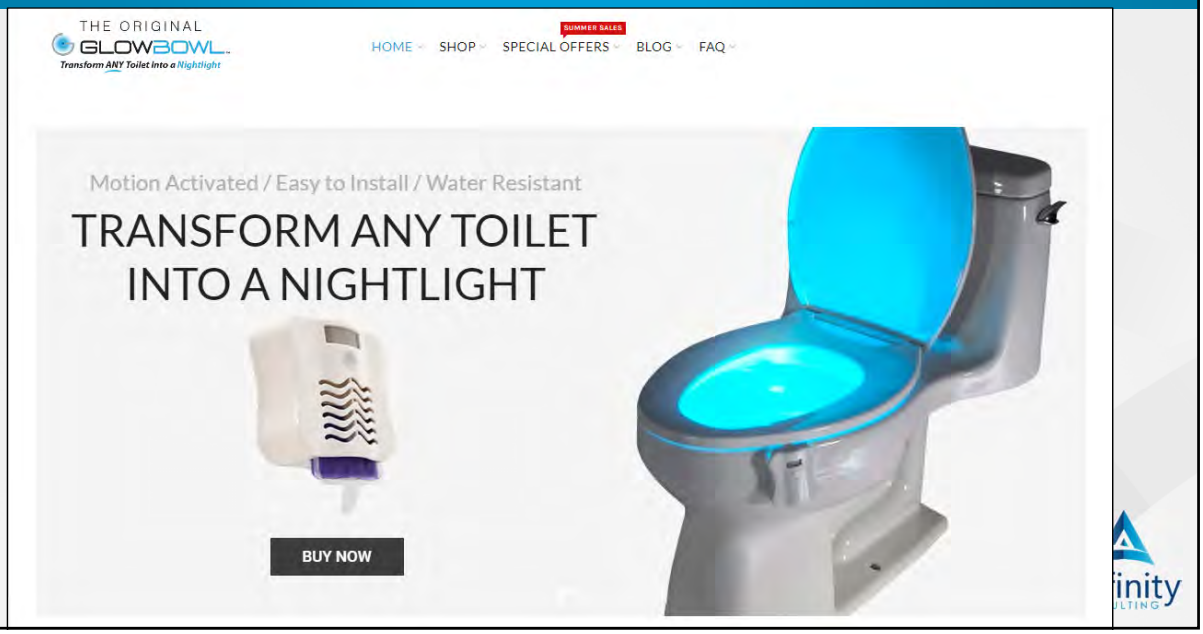

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South Carolina Bar
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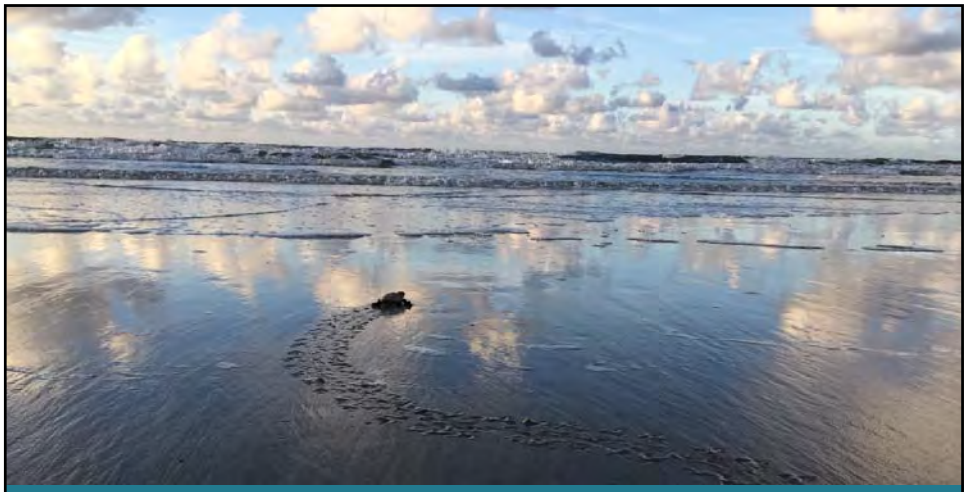
Stress and Anxiety and the Practice of Law

Shannon Furr Bobertz



Stress, Anxiety and the Practice of Law- Tips to Help You Unwind in your Daily Practice of Law (and Life)

December 2019

Shannon Furr Bobertz
Chief Counsel

KEEP
CALM
AND
NO
CELL PHONES

SC Bar Task Force on Attorney Wellness

What is it?

Focus on:

- Health
- Wellbeing
- Mindfulness
- Overall Health
- Changing stressors in the practice

South Carolina Bar

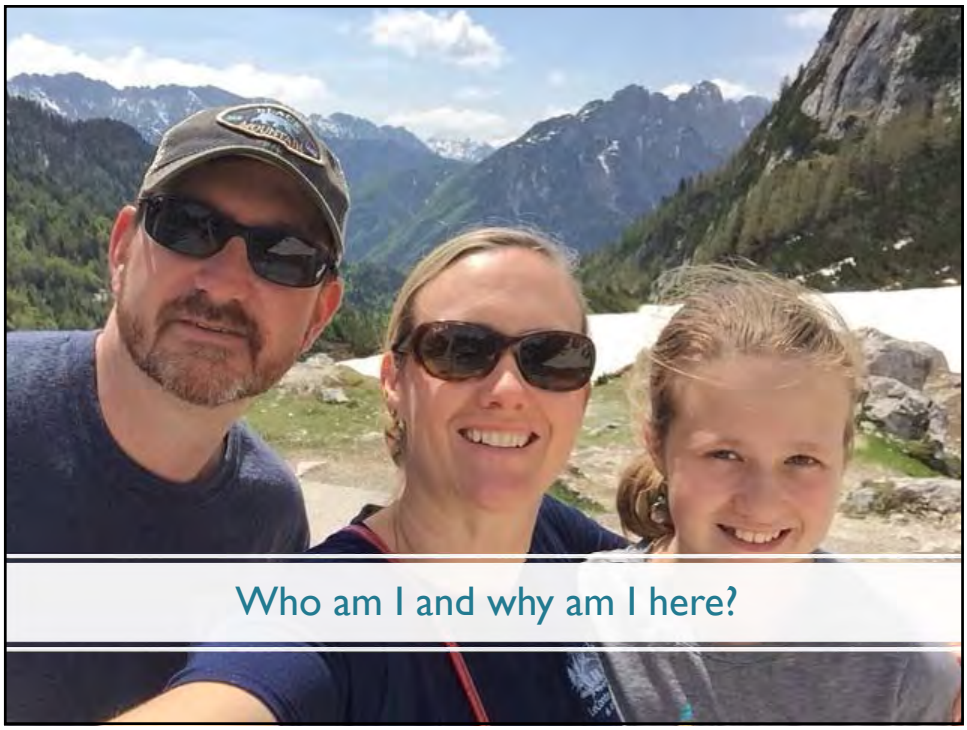
What is wellness?

Wellness is a state of complete physical, mental, and social well-being that is achieved through an active process of becoming aware of and making choices toward a healthy and fulfilling life.

We are hoping to catch attorneys before they get to the point of depression/substance abuse.

And, hoping to keep attorneys in the practice of law.

I was kicked out of the Bar for spending too much time at the bar.



Who am I and why am I here?

Lawyers In Distress in SC

2000 Lawyers are impaired
14 attorney suicides in S.C. the last 6 years

We will talk about:

- Reasons people leave the practice of law/ What you love about practicing law…
- Sleep
- Anxiety and Control
- Cultivating Happiness/Purpose
- Mindfulness
- Breathing Exercise

The most miserable job in America?

Does the cycle of anxiety and stress start in law school?

- First, law students come into the profession expecting success—and then 90 percent are disappointed when they don't rank in the top 10 percent.
- Students are thrust into an unfamiliar learning environment in which the predominant Socratic teaching method undermines self-esteem.
- Between 20 and 40 percent of law students suffer from clinical depression by the time they graduate;
- The incidence of clinically elevated anxiety, hostility and depression among students is eight to 15 times that of the general population; and that, out of 104 occupational groups, lawyers rank the highest in depression and fifth in incidence of suicide.
  - ABA Journal

Why did you go to law school?

- How has the practice of law/law school changed the way you view the world?

Perfectionism and Pessimism

- We are paid warriors!
- You can still fight, but BREATHE!!
- When you look at an email, or do something that makes you anxious, stop and make sure you aren't holding your breath…it invokes the "flight or fight" trigger.
- Stop, take a breath, proceed mindfully.

What makes you unhappy in the practice of law?

- Crippling student debt
  - Right now at the state schools it costs approx. $60,000 to go to law school.
- Law can be boring
  - Doesn't encourage creativity, instead consistency is good.
- Veers between periods of high anxiety and down time
  - A lot of sitting.
- Many people go to law school for lack of a better thing to do

What makes you unhappy in the practice of law?

- Lawyers are paid to be cynical
  - Paid to see the weakness in things, or brought in to clean up a mess.
- Clients!
  - We are in a service industry.
- Billing
  - Lawyers can be driven by time, overbooked.
- Lawyers are judgmental

What makes you satisfied in your practice?

- Money
- Helping people
- Hanging out with other lawyers
- Success in practice does not equal how successful you were in law school
- Winning a case
- Intellectually challenging
- Always learning
- What else?

How do we deal with anxiety and unhappiness?

Retrain Your Brain

- We are always making new patterns in our brains
- If you don't like the pattern, retrain your brain
- Changing bad habits- lower activation energy for habits you want to drop (take the battery out of your TV remote) and raise activation levels for habits you want to reinforce (keep a book you want to read on the coffee table with your remote)

SLEEP

- Why is it important?
  - Need to get 8-10 hours ideally
  - Lack of sleep linked to obesity, diseases, stress, depression
  - Brain actually cleanses itself of toxins while you sleep, lack of sleep is also linked to MS, Alzheimer's and Parkinson's
  - New study showed that lack of sleep has effects on the brain similar to a concussion

Lack of Control and Anxiety

- Make a list of stressors/daily challenges/goals
- Separate into two categories
  - What you have control over (Focus on these)
  - What you do NOT have control over (Let this go)

Positive Outlook

- Find something to look forward to (even if it's a vacation 6 months away)
- Commit CONSCIOUS acts of kindness (deliberate things, pay for the coffee for the person behind you in line)
- Exercise
- Infuse positivity into your surroundings (put things that bring you joy in your office- flowers, art, photos of loved ones, open the shades for light, etc.)
- Spend money- but not on stuff (on others, or experiences)
- Exercise a strength (make a list of your 5 strengths and do one a day)

Simplicity

- Do less, but do it better
- Be selective about the people you hire/work with
- Focus on a small set of goals, eliminate non-essential distractions
- Think about your purpose and say no to things that do not fit that purpose
- Identify what really matters to you and spend your time and effort on that
- Make choices deliberately for life and career
- Make limits/boundaries and stick to them

Cultivating a Positive Brain/Happiness

- Number One Predictor of Happiness- Social support
- Make time for friends and family- PRIORITIZE! More important than money.
  - When things are stressful and hard, do not turn into yourself, but open to the people around you to help you through it. Usually, a really difficult issue make a team stronger rather than weaker.
  - Make a list every day of three things that made you happy that day. (If you are a pessimist, can help turn that frown upside down)- retrains your brain.

Mindfulness

What is it and why practice it?

Mindfulness helps reduce depression

Helps foster big-picture perspective and separate us, even a little bit, from our emotional reactions to situations. Then, those emotional reactions have less power to dictate our behavior. We pause when agitated instead of reacting to it.

Mindfulness

- What is it?
  - Being still within ourselves, paying attention. Cultivate clarity, calmness and insight. Being sensitive and kind to yourself and others. It increases self-regulation, self-knowledge and self-awareness.
  - Can help you let go of unproductive, unhelpful thoughts.
  - Understand and manage yourself and your reaction to others
- How are you not mindful?
  - Multitasking
  - Constantly agitating your mind (phone/computer/TV/even reading)
  - Not slowing down to recognize when things are not going well in your life before it is too late.

Why practice mindfulness?

- Meditation helps you cope.
  - 2013 study between researchers in Spain and France and U. of Wisconsin study
    - Leisure day v. meditation and mindfulness day
    - Blood concentrations of enzymes in blood of meditators showed that the stress hormones dissipated quicker than in the leisure activity participants.
    - Not enough to just take a break and do something fun, but need to be mindful.

Mindful Eating

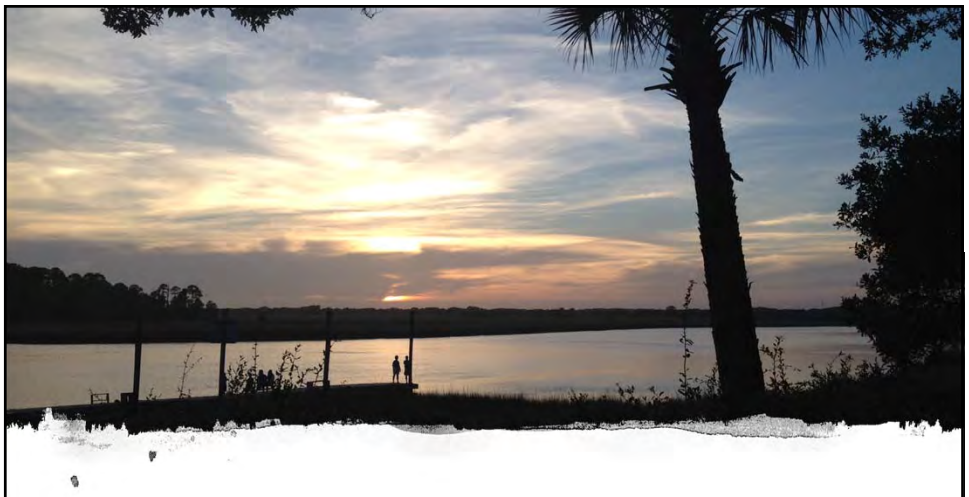
- Don't do other tasks while you eat (read, look at your phone)
- Savor and taste your food- there are no taste buds in your stomach!
- Eat slowly, 10-5-10 Rule
- If you eat mindfully, and only when you are hungry you will eat less!

Books

- *The Happiness Advantage: How a Positive Brain Fuels Success in Work and Life* by Shawn Achor
- *Essentialism: The Disciplined Pursuit of Less* by Greg McKeown
- *Big Potential: How Transforming the Pursuit of Success Raises Our Achievement, Happiness, and Well-Being* by Shawn Achor

Mindfulness Exercise

How can you be more mindful in everyday life?



Breathing Exercise

Questions/Comments?