

# Outrageous Efficiency in the Law Office Using Technology You Already Have: How to Move Toward a Paperless Law Practice Almost Painlessly

## I. Library of Accumulated Legal Knowledge (LAK)

### A. Introduction

Most lawyers I know keep their own Library of Accumulated Knowledge – “LAK” for short. My LAK is sacred. It is the archive of the many hard lessons I have learned over the years. It represents my hope that I won’t make the same mistakes twice, that I’ll be more efficient in my work, that I’ll be a better lawyer the next time I confront a similar legal problem. Case law, statutes, law journal articles, briefs, jury instructions, memoranda of law, sample pleadings, expert deposition transcripts, e-mails, web pages, expert CVs all go into the LAK. It’s all very useful information, **if I can find it again when needed.**

Like most lawyers, my LAK used to be paper documents kept in manila folders. The folders were stored alphabetically by topics like “Sudden Medical Emergency” and “Accident Reconstruction”. Many documents thrown into the folders came from pages ripped out of weekly advance sheets and legal magazines. Other documents, such as research memoranda and briefs, were work product culled from closed client files before archiving.

The manila folders in my credenza soon overflowed into banker boxes in the corner. Ironically, the bigger the LAK got, the less useful it became. Without a meaningful index, it became hard to find what I needed. Of course, I aspired to develop an indexing system to make the LAK more accessible, but who has time for that?

The bottom line is that the LAK is a great idea, but building and indexing it requires an on-going commitment of time and effort. The LAK is often found, well . . . lacking, because it can’t compete with more pressing matters.

My solution, which has worked very well, was to convert my LAK from paper to digital. (An “e-LAK”, if you will). By going digital, and changing my workflow slightly, **my LAK builds and indexes itself** in the course of doing my ordinary work. Let me show you how it works.

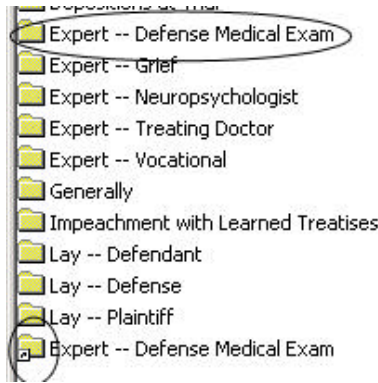
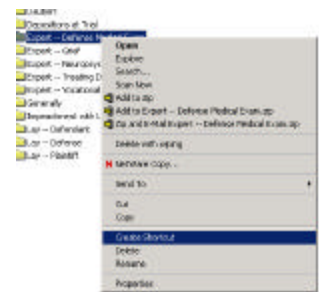
### B. Where do LAK Documents Come From?

The documents for the LAK generally come from either General Reading or Work Product. Both are described below. But much more important is how and when these





In this case, I keep my defense medical exam research under the “Expert – Defense Medical Exam” folder which is a sub-folder under “Witness Examination”. Just about the last place you would look! The first step is to create a pointer. To do this, right click on the folder (it works for files too) you want to point to, and select “Create Shortcut”.



The result almost looks like a duplicate of the original folder, except for the tiny arrow on the bottom left of the folder icon. The arrow tells you that it is a pointer (short-cut) to another folder rather than a folder itself. Now, you can rename the shortcut (right-click the short-cut and select “rename”) to anything you want and move it (drag and drop) anywhere you



want. Repeat as needed.

So, the top level of my LAK contains references to both IME and DME, and they both point to “Expert – Defense Medical Exam” folder which is a sub-folder under “Witness Examination”.

#### D. Take Your LAK Anywhere (and Leave it at the Office too)

A digital LAK is not only flexible, but it is highly portable too. Advances in technology make it easy to take the entire LAK with you. CD ROM burners are cheap and plentiful, coming as standard equipment on most new personal computers and replacing the old floppy disk technology for many people. A new generation of tiny, battery powered, USB connected hard disk drives allow you to carry almost unlimited information. All of these offer the opportunity to copy the LAK and take it with you to court, meetings with clients, or your favorite vacation paradise!

## II. Microsoft Word for Lawyers

In the old days, lawyers hired employees to type documents. Lawyers started to participate in the typing process when PCs landed on their desks. Whether this was an improvement is debatable. I have often witnessed three people standing around a computer for 45 minutes trying to untangle a Word document formatted by a lawyer. Not productive.

Word provides two separate tools for 1) **typing repetitive text** and 2) **imposing consistent text formatting**. These tools are the cornerstones of Microsoft Word. Remarkably, they are unknown to the vast majority of Word users.

**AutoText is the Word tool of choice for repetitive typing.** All law offices rely upon a certain amount of boilerplate text that can be used many times. AutoText allows the immediate insertion of boilerplate text, whether a few words or several pages, anywhere in a document with just a few key strokes. When used in conjunction with Word “fields”, AutoText can even prompt the user for unique text to insert into the boilerplate: a client’s name, for example.

AutoText is easy to create and easy to use once you know it’s there!

**Styles are used for repetitive formatting.** Formatting gives great meaning to text. Formatting tells the reader whether the text is a title, a quote, or a point of emphasis. Formatting can also be very time consuming. By the time you add a Roman numeral, bold, underline, increase the font size, and indent all of the headings in a pleading, it’s time for lunch! A Style can perform all of this formatting in one keystroke or mouse click. And, when it comes time to add another heading in the middle of the document, there is no need to remember all of the settings and renumber the Roman numerals. Styles will remember the settings for you and renumber the paragraphs automatically. If used correctly, Styles guarantee a sharp looking document. In addition, Styles are used to automatically generate a table of contents.

Styles are Words most underrated feature because they are hard to set up. However, they are very easy to use, and they have been set up for you. So, using them is a breeze.

**The bottom line is that AutoText and Styles save a lot of time and frustration.** Without these tools, a large percentage of word processing effort is spent on repetitive typing and formatting. This represents effort that cannot be spent on more productive activities. Using these tools, these repetitive functions are as close to effortless as possible – and documents will look better too.

#### **A. Styles**

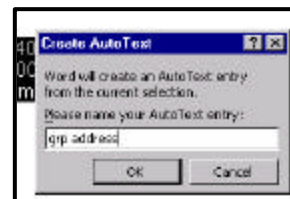
Styles apply formatting to an entire paragraph. Styles can specify the paragraph’s font, line spacing, indentation, paragraph numbering, and the amount of blank space at the beginning or end of the paragraph. Several Styles have been created for paragraph formatting commonly used at CPR&S. For example, the ‘Heading 2’ Style was used to create the heading just above this paragraph. The Style automatically added the “A.” (which will automatically update), applied the proper indentation (no tabs were used), and added bold and italics. All of this with just one keystroke: <Ctrl-Alt-2>.

#### **B. Auto-Text**

AutoText is a great feature to quickly save and reuse boilerplate text, including text with difficult formatting such as a case captions and pleading signature lines.

## 1. Creating A New AutoText Entry

- **Select the text** you want to keep for future use.
- While the text is selected, press “Insert → AutoText → New.” (Or use the shortcut keystroke, **Alt-F3**.)
- In the Create AutoText dialog box, **give the AutoText a convenient name**. Choose a name that you will remember or a name that you would naturally type. For example, for a signature line, try naming it “sincerely”. That way, the AutoText message will pop up every time you start to type “Sincerely yours”. **Note:** If you try to assign a name to an already existing AutoText, you will be asked whether you want to overwrite the old entry.



## 2. Using As Existing AutoText Entry

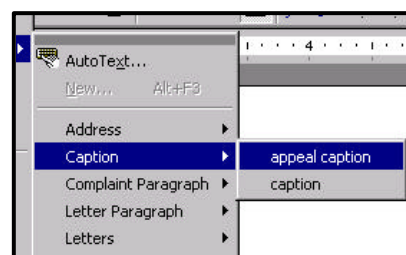
### Typing Method

Whenever you type the first few letters of the name of an AutoText, Word will pop-up the full name of the AutoText entry. To insert the AutoText, press ENTER or F3. If you don't want to use the AutoText entry, just keep typing.



### Menu Method

- Set the cursor where you want to insert the AutoText entry.
- On the Insert menu, point to AutoText. (To see a list of all the available AutoText entries, hold down SHIFT as you point to AutoText.)
- If the submenu contains a list of paragraph Styles, such as Normal or Salutation, point to the Style that's linked to your AutoText entry.
- Click the name of the AutoText entry you want.



## C. *Keyboard Short-cuts*

Thanks to technology, the use of page numbers in case citations is now obsolete. This is so because cases no longer come exclusively from bound volumes of official reporters. Individual case are now available from a variety of electronic sources which

are independent of the official reporters and their page numbering. Accordingly, Ohio has adopted a citation system to use paragraph numbers for pin point citations. It's about time too. But lawyers will need to get accustomed to the “¶” character. Where is that on your keyboard!?

You can assign a keyboard short cut to almost anything, including Styles, AutoTexts, and even macros.

### III. Adobe Acrobat – The Key to Paperless Law Practice

Adobe Acrobat has become the *de facto* standard for publishing electronic documents, legal and otherwise. For example, the Ohio Supreme Court, which publishes all Ohio appellate decisions on its website (<http://www.sconet.state.oh.us/>), has switched from Word to Acrobat. Furthermore, courts that accept or require electronic filing generally accept document in Acrobat format only. There are many good reasons for this.

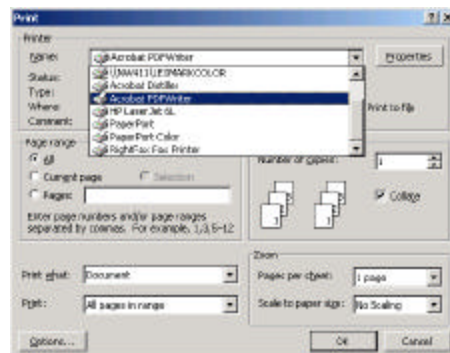
Word processing documents are easy to change, either intentionally or accidentally. Acrobat documents are less easy to change and allow the use of security features designed to guarantee a document's authenticity.

Acrobat documents can be viewed on just about any type of computer regardless of what word processing program is installed. The Acrobat viewer is available free of charge from the Adobe website ([www.adobe.com](http://www.adobe.com)).

Any serious acrobat user will want to purchase the full version of the program. The full version allows highlighting of text and electronic post-it note type annotations. The full version also allows the user to “print” to an Acrobat file. For example, it is easy to print a web page to Acrobat file. (See the discussion about PDFWrite below for more details.) Instead of paper, you get an electronic print-out which you can save to the hard drive. These electronic print-outs are word searchable and “annotatable.”

#### A. Scanning v PDFWrite

As indicated above, it's always easiest to start with an electronic document. E-mails, web pages, word-processing documents, slideshow presentations, and spreadsheets are all easy to turn into Acrobat documents with Acrobat PDFWriter. (Adobe PDFWriter is available only by purchasing the full version of Adobe Acrobat; it does not come with the free Acrobat viewer.) Rather than going to a printer, Adobe PDFWriter will be asked to store a pdf file to the hard disk. This will produce an electronic document which will appear on the screen exactly as it would in print, including all text and graphics.



If a document is not already in some sort of electronic format, you can scan paper documents into an Acrobat file as a last resort. This takes a little effort, but consistent with my philosophy, "if it ain't worth scanning, it ain't worth keeping". Also, copier technology is making the conversion from paper to Adobe easier. Many newer copiers are simply high speed digital scanners which immediately put the scanned image on paper. These copiers may be outfitted with an accessory which allows the user to direct the scanned image to a Acrobat file rather than to paper. If you ever need a paper copy, no problem! Simply print the Acrobat document to the copier which also acts as a high speed printer!

### ***B. Bate Stamp Add-On***

As good as it is, Adobe Acrobat does not do everything. Fortunately, the program allows third party vendors to produce "plug-ins" which expand Acrobat's functionality. Particularly useful for lawyers is a plug-in which applies a permanent, user definable bate stamp to any electronic document. For more information, surf to <http://www.intellipdf.com>.

Although a bit pricey, Lawyers will also find useful a plug-in for redacting electronic documents. For more information, search the web for "Redax plug-in".