TAB 4

20 Tips in 20 Minutes

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LAWPRO™

Practice Workshop: Opening your Law Office

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The Law Society of Upper Canada | Barreau du Haut-Canada

Continuing Legal Education

20 Technology Tips in 20 Minutes

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Introduction:

How can you use technology to work better, smarter and faster? This fast paced session reviewed about 30 tips in 30 minutes. This paper reviews some of these tips in more detail. Ultimately you can increase your bottom line by using technology more efficiently and effectively. You must actively work to learn the ways you can work better, smarter and faster with technology.

Top 10 Cash Flow Financial Reports to determine "How am I doing?"[1]

How do you assess how you are really doing? The key is cash flow management - you must understand what monies are coming into your practice, and where money is flowing out. The ten monthly managerial reports should you be getting from your accounting system (and what they mean) include:

1. **Overall and projected monthly billings:** What are your overall monthly billings, measured against your projected billing? This tells you if your gross income is meeting projections. Related to this is what % should a lawyer's income be of their collected monthly billings? According to Cotterman, they should be 55-60%[2].

2. **Projected billings versus cash flow:** Review collected billings measured against your budgeted cash flow needs for the month. This tells you if you are in a projected positive or negative cash balance for the month. Studies have indicated that you will have approximately a 105 day 'lag' between the date you incur an expense and the day you collect that expense from your client[3]. Accordingly it is important to keep a handle on your potential cash deficit.

3. **Actual versus budgeted costs:** What are your actual costs as compared to your budget? This will tell you if you are managing to run your office within the financial constraints that you anticipated. If your costs are high as compared to your budgeted amounts, then you will be required to cut other costs to compensate, or increase your collected billings. To be on the safe side, look at cutting your costs first before trying to increase your income, as cut costs take effect immediately, but income is subject to the collection 'lag'.

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[1] This section is taken from the Managing the Finances of Your Practice booklet by Daniel E. Pinnington and David J. Bilinsky, Lawyers' Professional Indemnity Company (LAWPRO®) and the Law Society of British Columbia (www.practicepro.ca/financesbooklet).
[2] Cotterman, James D., Capitalization, Debt and Taxes, Report to Legal Management, June 2000.
[3] Ibid.

4. **What is your WIP?** Is your work in progress increasing or decreasing? If it is increasing, is it due to time being put into contingency files that have the potential of paying off at some point in the future? Or is it building, as you have not been billing as regularly as you should? On files that can be billed monthly, you are doing yourself a disservice (and potentially digging yourself into a financial hole) if you fail to bill for the work done. WIP over 180 days/ Total WIP = 20 to 40%[4].

5. **What are your unbilled disbursements?** These represent credit that you have extended to your clients, and therefore capital that is unavailable for you to operate your practice. If at all possible, bill these out to recapture the necessary operating cash for your office. Disbursements can be one of the biggest components of total firm debt. Total debt/ net fixed assets = 50-80%[5].

6. **What are your receivables?** Are they increasing or decreasing? What percentage are they of your annual billings? 15% is high – 5% is within the range of acceptability. Uncollectible accounts represent holes in the bottom of the financial boat – that will sink the ship if not plugged. If you do have an unpaid account – do something about it – quickly. Recall that aging only benefits cheese and wine. Make early attempts at collection and determine whether or not further time and energy is warranted. Recall that attempting to collect an unpaid account against an unhappy client oftentimes leads to professional conduct complaints and malpractice claims – both of which can be emotionally and financially draining as well as PR nightmares. By acting quickly and decisively and staying within your written client credit policy you can minimize your exposure to bad debts.

7. **What is your realization rate?** The realization rate is the percentage of actual income paid to the firm from the billable hours of each timekeeper. For example, Partner X bills 200 hours per month at $200 per hour for a total amount billed of $40,000. Of that amount, 10 hours are written down (taken off the books) for various reasons, and clients pay a total of $30,000. Partner X's realization rate is 75%. Partner Z bills 150 hours at $200 per month, but she has no "write downs", and her clients pay 95% of that for a total of $28,500. Although Partner X bills more hours, because of the low realization rate, Partner Z with far fewer hours billed is generating almost as much income for the firm. Your computer-based time & billing program should be able to create this report for you. Examine the results and use it to help guide any discussion of compensation for partners and associates. A low realization rate indicates that a lawyer is using resources of the firm inefficiently – which is usually a sign of poor client or

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[4] Ibid.
[5] Ibid.

file selection. Realization rates should be no lower than approximately 90-95%[6].

8. **What are your unbilled fees and disbursements by lawyer, client and area of law:** Although some may not like it, firms should look at unbilled fees and disbursements aggregated separately by lawyer, client and area of law. Look for trouble-spots in these categories, and take steps to correct these as soon as possible.

9. **What are your daily lawyer time summaries:** Daily time summaries by lawyer are also important. To make this analysis accurate, all lawyers should be accounting for all their time – billable, firm administration or management, education, pro bono, vacation etc. Look for aberrations or time summaries that don't make sense or indicate poor time management or failure to meet minimum billable time requirements. A quick way to determine how many hours you should be billing is as follows: Take your desired annual income (say $150,000). Collected billings should be approximately twice that- $300,000. Factor in bad debt at 10%. That indicates that you should be billing approximately $330,000/year. There are approx 231 working days/year (365 minus: 21 days vacation, 104 weekend days, 9 statutory holidays). This indicates that you must bill approximately $1,400/day ($330,000/231). If you bill at $250/hour, this indicates that you must log 5.6 billable/hours/day – every day.

10. **What are your client trust account balances:** Review the trust account balances for all clients. Are there funds in trust that can be applied against unbilled time or disbursements? Are there clients/files that are approaching the exhaustion of their retainers or funds in trust? Do you need to write to these clients and warn them that they need to bring in further funds?

These are just a sample of the financial reports that can be generated by most computerized accounting systems. It is important to understand the role that each one can play in the running of your practice and how they can indicate small problem areas before they get to be big problems.

Technology Can Help You Capture More Time:

With technology, and a few tricks, you can increase your docketed time by catching more of the actual time you spend on tasks. This gives you more time to bill, which will ultimately transfer to a greater bottom line. Here are some ways you can use technology to capture more time:

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[6] Ibid.

Use electronic dockets and enter your own time:

Traditionally lawyers wrote out their dockets by hand, and someone else entered them on a computer. Today, modern law office accounting and practice management software products make it easy for you to directly enter your own dockets on the computer. The efficiency, extra speed and greater accuracy of electronic dockets makes this a no-brainer. Studies have shown that lawyers gain up to 20 per cent in their billable time when time dockets are created contemporaneously with task completion. Once entered on a computer, dockets can go directly into accounting programs, correspondence or accounts as is necessary.

Docket in detail:

Many accounting software programs have standard billing codes, for example, “conference with client”, or “review of correspondence.” While these codes are convenient (and you should use them for this reason), they don’t include enough detail. Having detailed dockets is critical as a record of the work you did on a file, and for communicating to the client the details of that work. A detailed docket should look something like this: “telephone conference with client re details of weekend access problems.” Or, “drafting of correspondence to client confirming instructions to skip zoning search.” Use the standard codes so you don't have to type the text in them out by hand, but add extra details. You will find that detailed dockets give a client much less opportunity to complain about their accounts, and you will be far more successful in defending your account in the event you end up before an assessment officer. Again, this sends more money to the bottom line

Docket every minute you spend on a file:

Don’t judge and write off time spent on a file as unnecessary by not docketing it on the day it was done. Wait until you final or interim bill the file, at which time you can properly judge all the factors that determine what should be billed, including the time that was spent on it. You can easily make adjustments to an an account by editing it at this stage. Trying to create dockets for work done in the distant past is very time-consuming, and not likely to be very accurate or complete.

Docket throughout the day:

It is universally recognized that lawyers who contemporaneously create dockets end up capturing a significantly greater portion of the work they have done. Docket your work as you go. Electronic dockets let you edit and append information to a docket at the day progresses. Spend a few minutes at the end of the day reviewing your dockets, and make any necessary corrections or additions while things are still fresh in your mind.

Docket all administrative and other non-billable time:

To properly evaluate where your time is being spent, it is important that you understand how much time you are spending on non-billable tasks, and what they are. Many of the modern practice management and accounting products can give you detailed reports and breakdowns of your time. These reports can really help you identify were your time is going, but they really won't help you unless you have a complete record your time. Docket everything!

The Power of Practice Management Software

Practice management software, originally called case management software, is a powerful tool for bringing efficiency to any size law practice or legal department. While it got its start in the world of litigators, hence the original "case management" label, practice management software has evolved to the point that it is for everyone, litigator and solicitor alike, and is equally useful for those in corporate legal departments. Not only can case management software help you better manage your practice and help minimize the chance of a malpractice claim, it can make you much more profitable by helping you be much more efficient. It will supercharge you and your practice! There is no better way to increase your bottom line.

There are many lawyers using Microsoft Outlook for e-mail, and a significant portion of those lawyers also use it for contact management and/or as a calendar. While Outlook is a reasonably good general purpose personal information manager, it is not specifically designed for use as a law practice or case management tool. It is contact centric, not matter centric. Lawyer work with matters. There are several excellent case or practice management programs specifically designed to help lawyers manage their law practices. They are matter centric, not contact centric. Ultimately anyone using Outlook should seriously look at moving to one of the law office specific practice management products.

Practice management programs are more than fancy calendars, with collections of e-mails and addresses. They have evolved into complex "practice management systems" that contain in one database almost all the information you need to run your law practice. When used properly, a case management program unifies all the data about a client, potential client or matter into a single point of reference. What this means for the practitioner is the ability to draw relations between events and information gathered over long periods of time by matter, documents or people, and bring them to bear on a particular issue or matter in an instant.

For example, Time Matters uses the metaphor of a time-line. From the time-line tab on a particular matter, the entire history of a particular matter can be viewed. The time-line displays all billing, email, notes, phone calls, documents created, documents scanned, legal research, events, and to dos (open and completed), showing the state of these items, who did the work, how long it took, and when it was done. Other information pertaining to a matter or contact can be viewed through the related tab.

Amicus Attorney presents all matter information using the metaphor of a traditional paper-based calendar and contact book. The ability to quickly identify all of the people related to a given matter, to review the history of e-mail communications and notes related to that matter, to view all of the past and upcoming events and deadlines, brings a high degree of efficiency to these necessary if mundane tasks. The status of a given matter can be assessed with a few clicks of a pointing device, without the need to find and review a physical file. For those willing to put more effort into customizing a particular application the rewards can be even greater. Practice management programs can be customized to create rules based scheduling. For example, when a matter has been set for trial, the program can calculate all of the case management deadlines based on the trial date. Changing a "contact" record from a potential client to a client code can launch a word processing application; prepare an engagement letter and even a first set of draft documents for a particular type of client.

Most of the practice management programs allow for quick and easy synchronization of the information hosted on the office server with a remote version of the program run off the network while away from the office. Taking a synchronized data set on a laptop computer generally provides far more case management information than can be synched to a personal digital assistant. Of course, you can still synchronize to a PDA if the laptop is too bulky to carry. Many of the practice management products now have Web versions that give you full access across the Web through a Web browser to all information, just as if you were sitting at your desk.

Use a daily scratch pad to track all your daily tasks so nothing falls through the cracks. At the beginning of each day print the page from your organizer program that has the day's meetings, tasks etc. In Outlook go to the Calendar and print the Daily Style. This gives you a one-page hard copy of that day's appointments and tasks, and a handy central place to make miscellaneous notes as the day progresses. Review it at the end of the day to make sure you complete or follow-up on all necessary tasks.

The most widely used law-office specific case management products include Amicus Attorney (www.amicusattorney.com), Time Matters (www.timematters.com), Prolaw (www.prolaw.com), Integra Office System (www.powerinn.com), and there are a host of others.

Take it away with a PDA

For those who don't want or need a laptop, taking all your key contact and calendar information on the road with you is easy with a Personal Data Assistant or PDA. Most PDAs include software that will transfer all of your key information from Outlook and most other PIMs and case management products to a PDA. Although you can spend and do more on a fancy wireless PDA, a basic $150 model will suffice for calendaring and contact management. With Outlook or other similar program and a PDA, you can completely eliminate the very time consuming task of keeping one or more duplicate paper-based diaries.

Tips Doing It Better With Technology:

Technology is an essential tool for practising law today. Ultimately you can increase your bottom line by using technology more efficiently and effectively. This section of the paper reviews a number of ways you can work better, smarter and faster with Windows and other software.

Miscellaneous Windows Tips:

Of course we all know, and love, Microsoft Windows. Here are some tips and tricks that will allow you to more quickly complete common Windows tasks and navigation

Load-up the Start menu:

By putting your frequently used applications and documents right on Start menu you can get to them with just two clicks. This is very easy to do, just drag and drop them there. Note that you can drag and drop menu items to reorganize them.

The power of a right click:

Use a "right click" for format and configuration settings: In many programs various options or features are available with a simple right mouse click, including formatting and configuration settings. These options and features are "context sensitive" – in other words, you will be presented with a list of choices that are relevant to the item, field or text you are right clicking on. For example, in Outlook right clicking on an e-mail in your Inbox presents you with Open, Print, Reply, Reply all, Forward etc. Right clicking on a blank spot on your calendar will let you create new appointments, and configure the calendar. You can right click on almost everything - try it!

Instant switches between programs:

Switching between open programs is probably one of the most frequent things we all do as we work on our computers. To do this most of us use the mouse to select an icon on the Task bar. There is a faster way. Remember that using a mouse to switch programs will likely mean taking your hands off the keyboard. Keeping them on the keyboard by using a keyboard shortcut will allow you to more quickly switch between programs.

There are two keyboard shortcuts that will allow you to do this. Alt+Tab will open a small grey pop-up window in the centre of your screen. It has an icon for each program that is open. Hold down the Alt key, and repeatedly hit Tab to jump from one icon to the next. A brief description of each icon appears in a text box at the bottom of the pop-up (it is actually the text that appears in the Titlebar of the Window for that program). Simply release both keys when you get to the program you want.

The second, Alt+ESC, will cycle you through all open program Windows. Hold down the Alt key, and repeatedly hit Esc to move through the open programs. With this shortcut each program appears on the screen. Simply release both keys when you get to the program you want.

Instant switches between documents:

You can also use a variation of the shortcuts in the previous paragraph to change from one document to another within a single program. For example, switching between two or more letters that you have open within Word. Ctrl+F6 will cycle you through all open document Windows within any single program. Hold down the Ctrl key, and repeatedly hit F6. Again, release both keys when you get to the document you want. This works on most programs.

The Awesome Google Toolbar:

This is a must have that gives you instant access to all the power of Google in an IE toolbar (IE 5 or later). When the Google Toolbar is installed, it automatically appears along with the Internet Explorer toolbar. This means you can quickly and easily use Google to search from any page in any Web site, without having to find and load the Google home page.

Google Toolbar features include the familiar Google Search, plus many other other great features. The Search Site feature alone is to die for. With one click it allows user to search only the pages of the site they're visiting. Other features include PageRank, which shows users Google's ranking of the current page; Page Info, which allows users to access more information about a page, including similar pages, pages that link back to that page, as well as a cached snapshot; Highlight, which highlights your search terms as they appear on the page; and more. Get it for free at http://www.google.com/. It takes only seconds to install and works with Windows 95/98/NT/2000/Me and Internet Explorer 5.x and later only

Make Programs Work the Way You Do With Preferences and Options:

To get the most out of any software program, you have to tweak its features and settings to match your own needs and preferences. To make these changes in most programs look for select the File menu bar item, then Preferences, and/or Tools, then Options. This will open a Preferences or Options dialog box which will contain dozens of default configuration settings. Change settings to those that more closely match how you work.

Customize Windows with Tweak UI:

Enhance and tweak Windows with this free utility. It is available as a free download on Microsoft's website. It is also available on many other websites, but make sure you get the most current version, especially if you are using Me, 2000 or XP. The Windows development team did some extra programming and put together Tweak UI. Among other things it lets you adjust your Windows User Interface, including menu speed, window animation, mouse settings, start-up options, Microsoft Internet Explorer setting and many more. Most computer users should find it to be quite helpful. Note you will see warnings when you install Tweak UI that isn't supported by Microsoft because they are not part of Windows. I have used it with all versions of Windows and have never had any problems. Get it at http://www.microsoft.com/

Learn and Use keyboard shortcuts

When it comes to formatting, and indeed just about anything else, you can do almost everything you can with the mouse with an equivalent keyboard shortcut. Using these shortcuts will usually be faster than a click on the formatting toolbar buttons that do the same thing simply because you don't have to take your hands off the keyboard, reach for the mouse, make the selections you want with the mouse, then return your hand to the keyboard to continue typing. These shortcuts work in most Windows applications, including Word, WordPerfect, and Excel.

If you are not familiar with the syntax for describing keyboard shortcuts, simply remember that a plus sign (+) between two keys means that you press the listed keys, almost simultaneously, moving from left to right. For example, a capital B would be described as Shift+B.

Lastly, remember that old habits won't easily fade away. To complete the various tasks outlined below, you will find yourself reaching for your mouse without thinking about it. To help you remember to use these shortcuts, trying putting a Post-it on the edge of your monitor.

Essential keyboard shortcuts for jumping through and selecting text:

Editing text is probably the most frequent task you undertake on your computer. With these four shortcuts you will be able to edit text much more quickly:

- Ctrl+left or right arrow to jump one whole word at a time;
- Ctrl+up/down arrows to jump a paragraph at a time;
- Ctrl+Shift+right or left arrow to both select and jump one whole word at a time; and
- Ctrl+Shift+up/down arrows to both select and jump a paragraph at a time

Keyboard shortcuts for instant formatting:

Underline, bold and italics are among the most commonly used formats for text in many documents. These three shortcuts give you easy and instant access to the noted format:

- press Ctrl+U for underline;
- press Ctrl+B for bold; and
- press Ctrl+I for italics.

If you select or highlight a section of text within your document (using the shortcuts in the previous paragraph of course), pressing any one of these shortcuts with apply the relevant format to the selected text.

Note that these shortcuts work as you are typing text in as well. As you are entering text, simply press the appropriate shortcut to turn the format you want on, continue typing until you reach the end what you want in that format, and press the same shortcut again to switch back to normal text. This allows you to easily format text as you type without having to reach for your mouse.

Instant Alignment:

There are four keyboard shortcuts for changing text alignment as you type. These shortcuts work in both in both Word and WordPerfect. Of course You can also change text alignment with the alignment Toolbar buttons, and by selecting Format, Paragraph and selecting the alignment you want in the Alignment dropdown box. However, using these keyboard shortcuts will always be much faster. To quickly change text alignment while you type by using one of the following keyboard shortcuts:

- press Ctrl + E to Center text;
- press Ctrl + L to Left align text;
- press Ctrl + R to Right align text; and
- press Ctrl + J to Justify text.

Justify aligns the text to both margins by placing more space between the letters and words in each line. Justified text looks nicer because it is aligned to both margins, but the extra spacing between letters and works can make it harder to read. For this reason it should be used with caution.

Easy Selection of a Long Piece of Text for Cut/Copy:

If you are trying to cut/copy a very long piece of text, or text in a small tight area, select it by doing the following: click once where you want the selection to start; scroll to where you want the selection to end (but don't click within the document); press and hold Shift while you click at the end. This will select and highlight all text between the starting and ending points. You can then cut, copy, format etc. the selected text.

The essential Outlook keyboard shortcuts include:

- Ctrl+Shift+M to create a new message
- Ctrl+Enter to send a message
- Ctrl+Shift+I to jump to the Inbox
- Ctrl+Shift+B to jump to the address book
- Ctrl+Shift+K to create a new task
- Ctrl+Shift+N to create a new note

E-Mail Tips

At times it seems that e-mail will grind civilization to a halt. Here are some tricks and tips to help more effectively and efficiently deal with e-mail:

Avoid inbox overload:

Don't use your inbox as a catch-all folder for everything you need to work on. Doing this almost guarantees that at some point you will miss something important. Read items once, and answer them immediately if necessary (see the 1 minute rule), delete them if possible, or move them to task or matter-specific folders. Consider setting up one or more temporary holding folders. For example, put messages that need to be dealt with in a "current" holding folder, and put wait-and-see messages that are not time sensitive in a "wait" folder. Putting all messages to or from a specific client into one folder makes it easier to review the messages relevant to just that client.

Use Rules to reduce Inbox messages:

Most e-mail programs have a "Rules" feature. Rules can help you manage your Inbox by automatically moving incoming messages to various sub-folders based on specific criteria. You create Rules to meet your own needs by specifying your own criteria. They can be set to run automatically without your intervention. Rules are especially helpful if you are on an e-mail list, and in particular a high-volume list. For example, if messages from a list you are on always have the text [LawInfo] in the subject line, you create a rule that checks the subject line of every incoming message, and automatically moves any message with this text into the appropriate folder. This removes them from your Inbox. You simply go to this folder whenever you want to review the messages from the list.

Set aside time to review e-mail:

Many people struggle to keep up given the shear volume of e-mail they receive. On of the things you can do help you cope is to religiously set aside part of your day to review your new e-mails. Pick a time of the day that you will have appropriate energy and focus for this task.

The 1 Minute Rule:

In all likelihood you can very quickly deal with the vast majority of the e-mails you receive. What will bog you down is spending time on the relatively few e-mails that take considerably longer for you to review and deal with. The solution is the 1 Minute Rule. It says that as you are reviewing your new messages, you should answer all that you can deal with in a minute or less, and deal with the ones that will take longer at a later point in time. Depending on the type and quantity of messages that you receive, a 2 Minute Rule may make more sense for you.

Be a Better Word-processor

Most people will have a collection of words, phrases and paragraphs that they use over and over again. Unfortunately, most people type these out manually. With the AutoText, AutoComplete and AutoCorrect features in Word this is totally unnecessary. With these three features you can significantly decrease the time it takes you to create many of your documents. This paper reviews the feature within Word. WordPerfect has similar features.

Save tons of keystrokes (and time) with AutoText:

The AutoText feature offers a way to store and quickly insert text, graphics, fields, tables, bookmarks, and other items that you use frequently. Microsoft Word comes with a number of built-in AutoText entries that are divided into different categories. For example, if you're working on a letter, Word can offer letter-specific AutoText entries, such as salutations and closings. Insert an AutoText entry. In addition, you can create your own AutoText entries. This is useful if you often use the same large or complex item and don't want to have to reinsert or retype it, or if you want to store text that contains a particular style or format. For example, if you send customers a monthly report that always includes the same lengthy disclaimer, you can create an AutoText entry for the disclaimer. After doing so, you can put it into a document you are creating with just a few keystrokes.

To Insert an AutoText entry, do the following:

- Click in the document 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.

AutoComplete gives your computer ESP:

AutoComplete is the feature that helps you quickly insert an AutoText entry or date. AutoComplete feature works by recognizing a few identifying characters of the AutoText entry. You can also use AutoComplete to insert the current date, a day of the week, or a month. When you type the characters, Word displays a ScreenTip, at which point you can insert or ignore the entry. For example, type augu for the month of August. When Word suggests the entire item, "August", press ENTER or F3 to accept it. (If you then type an additional space, Word suggests the current date, such as "August 22, 1998.") To ignore the entry, keep typing.

To Turn on or off the different AutoComplete features do the following:

- On the Insert menu, point to AutoText, and then click AutoText.
- Select or clear the Show AutoComplete tip for AutoText and dates check box.

After you select the check box, Microsoft Word will display a ScreenTip when you type the first few characters of a date or AutoText entry, at which point you can insert the entry or continue typing.

No more typos with AutoCorrect:

You can use the AutoCorrect feature to automatically detect and correct typos, misspelled words, grammatical errors, and incorrect capitalization. For example, if you type teh plus a space, then AutoCorrect replaces what you have typed with "the." You can also use AutoCorrect to quickly insert text, graphics, or symbols. For example, type

(c) to insert ©, or type ac to insert "Acme Corporation." This feature can save considerable time for someone who is not the best speller or typist.

To use AutoCorrect, you must first turn on or off the AutoCorrect options. They are:
1. Capitalization options For example, AutoCorrect can capitalize the first word in a sentence or the names of days of the week.
2. AutoCorrect entries AutoCorrect can use a list of built-in corrections, called AutoCorrect entries, to detect and correct typos, misspelled words, grammatical errors, and common symbols. You can easily add your own AutoCorrect entries or remove unwanted ones.
3. Spelling checker corrections For enhanced spelling correction, AutoCorrect can use corrections that are generated by the spelling checker's main dictionary (in addition to the built-in list of spelling corrections).

Once you've set the AutoCorrect options, type the text that you want to correct, followed by a space or other punctuation, and watch the correction occur.

Teaching, Training and Learning Technology

The vast majority of people make use of a small fraction of the functions and abilities of the software on their computers. At least in part this a result of the fact that the interfaces of most software programs are not terribly intuitive at times. Further, despite best efforts and intentions, most people have very little formal training on most of the software applications we use, and due to the day-to-day pressures of work and family, most do not make time for training. Making sure you and your people can make maximum use of the all technology on their desktop will transfer more dollars to your bottom line. Here are some ideas to do this:

Training, Training, Training!

To get the most out of any program you must spend some time formally educating the people who will be using it. Some may like or need to be taught in a formal a structured way. For those that like self-paced learning, some like books. The best book on MS Word is Word For Law Firm book by Payne Consulting - note there are different versions of this book for the different versions of Word). Another option is Keystone Learning Systems (www.keystonelearning.com). They have excellent sets of video tapes or CDs at Basic, Intermediate and Advanced levels for most widely used software products. For example, a set of 3 tapes for Outlook 2000 costs US$160. The CDs are ideal as you can review them right on the computer you are working on, assuming it is multi-media.

Recruit a Tour Guide:

Get a tour of any new application you are learning from someone who already knows it (and knows what you need to do with it). They will walk you to the features and functions that will be most helpful to you. And while you won't remember everything they show you, you will likely remember enough to try and find and use things on your own

Take Baby steps:

When you do sit down to try to increase your skills in a program, don't try too tackle too much at once (And don't make your staff do the same!). Tackle one new program at a time, and if you can try to master on one new feature or function at a time.

An ounce of prevention is worth a pound of cure

Your computer is never going to crash at 4:29p.m. on a Friday before a long weekend when you couldn't care less if it stopped working. It will crash 20 minutes before you have a critical deadline. Having this happen to you is extremely frustrating, time consuming, and can be very costly. By performing basic maintenance on your computer, and running appropriate software to prevent security breaches, you can help avoid time-consuming system crashes and data corruption. Essential software for safe and reliable computing includes: the installation of all Windows updates; anti-virus software; backup software (and hardware), a firewall; and the proper use of passwords

To fix Windows security vulnerabilities:

You must regularly update you Windows, e-mail and browser software. To easily do this for Windows and other Microsoft products, (Internet Explorer, Outlook, Outlook Express etc.), go to www.windowsupdate.com and follow the instructions. The tools on this Web page will review the Microsoft software on your computer, and tell you what updates are available. If you are using non-Microsoft software, check for updates at the product's Web site. You don't have to install all available updates, but should work through and install all security related updates. One of the updates (Windows Automatic Update, formerly call Critical Update Notification) will install a feature that notifies you when critical updates are available for your computer.

You must run anti-virus software on your computer.

Once installed, anti-virus programs are running all the time on your computer, all the while monitoring the other programs that are running. If they detect virus activity, they stop it, and in the process, hopefully prevent infection and data loss or damage. Norton Ant-virus (www.symantec.com) and McAfee's VirusScan are the two most widely used anti-virus programs. Don't forget to regularly update your virus definition files. The information in these files allows anti-virus programs recognize virus infections when they are occurring. As there are new viruses being created everyday, you need to have the most current virus definition file to be protected against all possible infections. To update these files go your anti-virus software's Web site and follow the update instructions. Most anti-virus software programs allow you to configure them to download these updates automatically.

Computer backup best practices:

Computers and other legal technology have become a critical part of practising law. Every law firm has huge amounts of irreplaceable data on server and/or desktop hard drives. The most critical part of any disaster recovery plan is backing up the data on your firm's computers. A backup will allow you to recover when hard drives are lost or damaged (due to theft or fire), or when they fail. Computer hard drives are complex pieces of electronic hardware which have moving parts. All hard drives are subject to failure, and most ultimately will if they are used long enough.

You should do the following things to ensure you have a complete and reliable backup:

- Do a full backup: Full backups are preferred to partial backups. Having everything that was on your hard drive is better than finding out you need a critical file that isn't in your backup and is not otherwise available.
- Do backups daily: Modern backup hardware is able to do complete backups of large hard drives in a matter of hours. Backups can be set to run automatically, usually in the middle of the night. Doing a daily backup ensures you are as up-to-date as possible. It will have all of the work and data that you created up until the end of the previous day.
- Identify responsible person(s) and alternatives: Doing the backup should be a mandatory responsibility that is assigned to a specific individual, and a specific alternate individual. You want to ensure that a backup is done every day, without fail. Review the backup log: Most backup software programs create a log report when a backup is completed. This report details what was backed up, and if there were any problems.
- Regularly do test restores: Don't believe the backup log. Periodically it will report successfully completing a backup, despite the fact that some or all of the data to be backed up was missed. The only way to truly test your backup is to regularly do a test restore of selected files and folders.
- Identify offsite storage location: Tapes left on top of your server in your office will be destroyed or taken along with your server if there is a fire or theft. You should store at least some backup tapes in one or more safe off-site locations.
- Rotate and keep generations of tapes: Don't use the same tape over and over; rotate your backup tapes. For example, use a series of five tapes, one for each night of the week. This can be helpful when database corruption is detected sometime after it occurred. Having an older backup will allow you to reach back to an earlier date if necessary. Some firms keep end of week, end of month or end of year backups. Replace tapes regularly: Backup tapes degrade over time and with use. You should replace your backup tapes every six months. When they get to the end of their life rotate them out as end of month tape etc.
- Don't forget data on desktops, laptops and PDAs: Usually server backups are configured to only backup data on servers. Make sure that data on desktop computers, laptops and PDAs (Personal Digital Assistants) gets backed up as well. Also have staff back up the phone numbers stored in their cell phones.
- Make sure open files are being backed up: Some backup software, and in particular older versions, will not back up files that are in use or "open" by other programs. Central accounting system, e-mail and other database files often remain open 24 hours a day. Make sure that your backup is getting all open files.
- Create written instructions for restoring: Many offices have one or two people who know how to do a backup, but no one who knows how to restore backed up data. Create written instructions and train several people to do this task.
- Find a hardware backup buddy: If your backup server and tape unit are destroyed or stolen, you could find yourself with a good backup tape and no

compatible tape unit to do a restore. Ideally find someone who has a server and tape unit that is identical to yours.

A partial backup from last week is better than no backup at all. If you aren't doing full regular backups, at least spend some time backing up some of your important files. It is easy to copy files onto a CD or some type of removable storage device. It is even easier to simply copy them to another computer on the network. This won't help if your office burns down, but it will if you have a hard drive failure.

Install a firewall:

Especially if you are on a high-speed internet connection. Remember that once you are connected to the internet, your computer can be seen by other computers on the internet. Computers have to see each other, at least at some level, to transmit data back and forth. In the process of creating this back and forth communication, lines of communication are opened. These are called ports. The problem is that when a port is left open, it potentially allows unauthorized people to access your computer. A firewall is really nothing more than a gate-keeper that makes sure that all communications that are occurring are legitimate, and gives a warning if it spots illegitimate communications.

Firewalls come in two varieties: hardware and software. Hardware firewalls can have more functionality and are harder to configure. For this reason they are often used in commercial settings. Software firewalls are easier to set-up and are adequate for personal use. ZoneAlarm (www.zonealarm.com) is a good free personal software firewall that is easy to install and use. The ZoneAlarmPro version has more advanced features and is available for a nominal fee.

Tune-up your Computer:

No matter how much memory on your computer, it will slow down after time. Use Windows System Tools to run Clean Up, Scandisk, and Defragmenter. These 3 tools are basic preventative medicine for your computer. Versions of these utilities come will all versions of Windows. Access them at Start, Programs, Accessories, System Tools. While there are loads of similar third party tools that will do the same, and often more, you can go a long way towards avoiding problems by regular use of these three tools. Disk Defragmenter rearranges files, programs, and unused space on your computer's hard disk, so that programs run faster and files open more quickly. ScanDisk is used to check your hard disk for logical and physical errors. ScanDisk can then repair the damaged areas. Disk Cleanup helps free up space on your hard drive. Disk Cleanup searches your drive, and then shows you temporary files, Internet cache files, and unnecessary program files that you can safely delete. You can direct Disk Cleanup to delete some or all of those files.

Conclusion:

Technology is the genie in the bottle – it has the ability to change your life forever. But like that mystical genie, you must be able to ask it the right questions to achieve lasting satisfaction. By tweaking your financial reporting system, by looking at how you evaluate technology investment and by adjusting the technology so it can work harder and smarter, you are well on the way to achieving the wishes of your dreams by increasing your profitability via technology.

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DAN PINNINGTON (dan.pinnington@lawpro.ca) is Director, PracticePRO, at the Lawyer's Professional Indemnity Company (LAWPRO). LAWPRO (www.LawPRO.ca) is the malpractice insurer for all lawyers in private practice in Ontario. PracticePRO (www.practicepro.ca) is LAWPRO's innovative change and risk management initiative. Its goal is preventing claims. It provides lawyers with tools and resources to assist them in incorporating risk management strategies into their practices, including the use of technology. Prior to joining LAWPRO Dan practised for seven years as a litigation n Associate in the Litigation Department at a Niagara Falls area law firm. Dan has advanced technology skills, and for several years also held the Manager of Information Systems position at his firm. Dan is well known in legal technology circles, and writes regular and occasional articles on legal technology for several legal and general publications and newspapers. Dan has presented at ABA Techshow in Chicago, The Pacific Legal Technology Conference, LegalTech Toronto and many other CLE conferences. Dan is Chair of the Ontario Bar Association Law Practice Management Section, is Vice-Chair of the OBA Technology Committee, and is on the executive of the OBA Solo, Small Firm and General Practice Section. He is Secretary to the CBA Law Practice Management and Technology Section. He is also on ABA 2004 Techshow Board and the Practice Management Advisors and Core Web Committees of the American Bar Association Law Practice Management Section. He is a past president of The Canadian Society for the Advancement of Legal Technology.