The Solo and Small Firm Practice Symposium

November 15, 2018

8:00 a.m. – 3:25 p.m.

CBA Law Center

New Britain, CT

CT Bar Institute Inc.

CT: 5.0 CLE Credits (4.0 Ethics; 1.0 General)
NY: 6.0 CLE Credits (5.0 Ethics; 1.0 LPM)

Lawyers’ Principles of Professionalism

As a lawyer I must strive to make our system of justice work fairly and efficiently. In order to carry out that responsibility, not only will I comply with the letter and spirit of the disciplinary standards applicable to all lawyers, but I will also conduct myself in accordance with the following Principles of Professionalism when dealing with my client, opposing parties, their counsel, the courts and the general public.

Civility and courtesy are the hallmarks of professionalism and should not be equated with weakness;

I will endeavor to be courteous and civil, both in oral and in written communications;

I will not knowingly make statements of fact or of law that are untrue;

I will agree to reasonable requests for extensions of time or for waiver of procedural formalities when the legitimate interests of my client will not be adversely affected;

I will refrain from causing unreasonable delays;

I will endeavor to consult with opposing counsel before scheduling depositions and meetings and before rescheduling hearings, and I will cooperate with opposing counsel when scheduling changes are requested;

When scheduled hearings or depositions have to be canceled, I will notify opposing counsel, and if appropriate, the court (or other tribunal) as early as possible;

Before dates for hearings or trials are set, or if that is not feasible, immediately after such dates have been set, I will attempt to verify the availability of key participants and witnesses so that I can promptly notify the court (or other tribunal) and opposing counsel of any likely problem in that regard;

I will refrain from utilizing litigation or any other course of conduct to harass the opposing party;

I will refrain from engaging in excessive and abusive discovery, and I will comply with all reasonable discovery requests;

In depositions and other proceedings, and in negotiations, I will conduct myself with dignity, avoid making groundless objections and refrain from engaging I acts of rudeness or disrespect;

I will not serve motions and pleadings on the other party or counsel at such time or in such manner as will unfairly limit the other party’s opportunity to respond;

In business transactions I will not quarrel over matters of form or style, but will concentrate on matters of substance and content;

I will be a vigorous and zealous advocate on behalf of my client, while recognizing, as an officer of the court, that excessive zeal may be detrimental to my client’s interests as well as to the proper functioning of our system of justice;

While I must consider my client’s decision concerning the objectives of the representation, I nevertheless will counsel my client that a willingness to initiate or engage in settlement discussions is consistent with zealous and effective representation;

Where consistent with my client's interests, I will communicate with opposing counsel in an effort to avoid litigation and to resolve litigation that has actually commenced;

I will withdraw voluntarily claims or defense when it becomes apparent that they do not have merit or are superfluous;

I will not file frivolous motions;

I will make every effort to agree with other counsel, as early as possible, on a voluntary exchange of information and on a plan for discovery;

I will attempt to resolve, by agreement, my objections to matters contained in my opponent's pleadings and discovery requests;

In civil matters, I will stipulate to facts as to which there is no genuine dispute;

I will endeavor to be punctual in attending court hearings, conferences, meetings and depositions;

I will at all times be candid with the court and its personnel;

I will remember that, in addition to commitment to my client's cause, my responsibilities as a lawyer include a devotion to the public good;

I will endeavor to keep myself current in the areas in which I practice and when necessary, will associate with, or refer my client to, counsel knowledgeable in another field of practice;

I will be mindful of the fact that, as a member of a self-regulating profession, it is incumbent on me to report violations by fellow lawyers as required by the Rules of Professional Conduct;

I will be mindful of the need to protect the image of the legal profession in the eyes of the public and will be so guided when considering methods and content of advertising;

I will be mindful that the law is a learned profession and that among its desirable goals are devotion to public service, improvement of administration of justice, and the contribution of uncompensated time and civic influence on behalf of those persons who cannot afford adequate legal assistance;

I will endeavor to ensure that all persons, regardless of race, age, gender, disability, national origin, religion, sexual orientation, color, or creed receive fair and equal treatment under the law, and will always conduct myself in such a way as to promote equality and justice for all.

It is understood that nothing in these Principles shall be deemed to supersede, supplement or in any way amend the Rules of Professional Conduct, alter existing standards of conduct against which lawyer conduct might be judged or become a basis for the imposition of civil liability of any kind.

--Adopted by the Connecticut Bar Association House of Delegates on June 6, 1994

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The Solo and Small Firm Practice Symposium

Thursday, November 15, 2018

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9:00 a.m. – 9:10 a.m.	Break
9:10 a.m. – 10:10 a.m.	**Selecting a Practice Management Program and How It Can Mitigate Risk** Attorneys have been subjected to substantial sanctions for their ignorance, or even reckless disregard, in handling client documents, data, communications and other electronic exchanges. This session will explain the ethical implications of selecting and using a practice management program while providing attorneys with the knowledge to avoid malpractice claims. We will discuss common claims and how technology can assist in preventing them. Speaker: **Adriana Linares**, LawTech Partners, Orlando, FL
10:10 a.m. – 10:20 a.m.	Break
10:20 a.m. – 11:20 a.m.	**Your Ethical Responsibilities with Your Legal Documents** This session highlights potential pitfalls of sharing Word docs and PDF's in their electronic form, as well as discusses tools and techniques for avoiding issues when sharing. Metadata is electronically stored information that generally is not visible from the face of a document that has been printed out, or as first seen on a computer screen. Microsoft Word is particularly vulnerable to exposing such information which often is useless but at other times, can be quite significant and perhaps even privileged. Speaker: **Adriana Linares**, LawTech Partners, Orlando, FL Moderator: **Christopher P. Kriesen**, The Kalon Law Firm LLC, Hartford
11:20 a.m. – 11:30 a.m.	Break
11:30 a.m. – 12:30 p.m.	**Managing Client Expectations in an Amazon World**

Speaker: **Ryan McKeen**, Connecticut Trial Firm LLC, Glastonbury

Amazon has 1.3 billion transactions per day. Your clients use Amazon. Your clients' expectations are set by Amazon. The problem is there is no Amazon Prime in law. You can't close on a house or get a divorce or settle a car accident claim by saying…"hey Alexa." At least not yet. Though it is not hard to imagine a day when this happens.

Consumer expectations and the legal process are at odds. And attorneys are caught in the middle of dealing with inefficient processes beyond their control and clients who have unrealistic expectations. This presentation focuses on what firms can do to handle these difficult waters and seize the moment to thrive.

12:30 p.m. – 1:15 p.m. Lunch

1:15 p.m. – 2:15 p.m. **Recognizing and Addressing Common Security Threats in Your Law Firm**

Another day, another data security breach. Data breaches have proliferated with amazing speed. Because of the sensitive data that law firms collect and store, they are a favorite target for hackers and cybercriminals. We will address common issues such as strong passwords, two-factor authentication, secure browsing, protecting digital client files, mobile device security, and encrypting data in transit and at rest.

Speaker: **Adriana Linares**, LawTech Partners, Orlando, FL
Moderator: **Austin Berescik-Johns**, Law Office of Austin B. Johns LLC, Hartford

2:15 p.m. – 2:25 p.m. Break

2:25 p.m. – 3:25 p.m. **Mindfulness is Nice, but How about Some Techfulness? Let's Embrace Technology to Reduce Stress, Not Create It**

With laptops, smartphones, and persistent internet, lawyers are only a call, text, or email away from business and client demands, long after "normal" business hours have ended. More often than not, technology takes the blame for added anxiety in our lives. But we can certainly turn the tables on it and use technology to our advantage. Simple and affordable tools, services, and apps can be used to help busy lawyers reduce stress, boost mental and emotional health and help to deliver superlative client service.

Speakers: **Adriana Linares**, LawTech Partners, Orlando, FL; **Henry A. Herrman**, Herrman Law Firm, Los Angeles, CA

3:25 p.m. – 3:35 p.m. Break

3:45 p.m. – 4:30 p.m. **Relax and Refresh Yoga with Angie Jacques**, Take Shape With Angie LLC

Relax and refresh during this all levels yoga posture flow to promote calm and renewal. Class ends with a 10 minute deep relaxation with guided meditation.

Faculty Biographies

Attorney **Austin Berescik-Johns** practices in torts and appeals at the Law Office of Austin B. Johns, LLC, in Hartford, Connecticut, representing individuals and small businesses in complex civil litigation. He has litigated an array of legal issues, including asbestos exposure, breach of contract, CUTPA, Dram Shop Act and liquor liability, negligence, products liability, and wrongful death claims. Attorney Berescik-Johns is also an experienced appellate litigator, having successfully written and argued numerous appeals to the Connecticut and federal appellate courts.

Attorney Berescik-Johns is actively involved in the Connecticut Bar Association (CBA). He has served on the Executive Committee of the CBA's Young Lawyer Section since 2012; currently, he serves as the Legislative Affairs Director. He also sits on the Board of Directors of the New England Bar Association, and previously represented his colleagues through the CBA House of Delegates, as well as the American Bar Association House of Delegates. Attorney Berescik-Johns is also a fellow of the American Bar Foundation.

Attorney Berescik-Johns obtained a J.D. from Quinnipiac University, and a B.A. in philosophy from Trinity College. He is admitted to practice in Connecticut, the United States District Court for the District of Connecticut, and the Supreme Court of the United States.

Walt Hampton, J.D. is President and Chief Operating Officer of Summit Success International. He is a business coach, law firm management consultant, and leadership trainer. Founder of the Positive Leadership Academy, he is a leading authority on the application of Positive Psychology in the workplace. He is the best-selling author of *Journeys on the Edge: Living a Life That Matters*, a two-time winner of the North American Book Awards. He is also the author of *The Power Principles of Time Mastery: Do Less, Make More, Have Fun*.

A graduate of The Cornell Law School, Walt practiced law in the areas of corporate and commercial litigation and criminal defense. He was the managing partner of a law firm for more than 30 years.

Walt's passions are high-altitude mountaineering, ultra-distance running, blue-water sailing & adventure photography. He and his wife, the author Ann Sheybani, live in Castletownshend, Ireland.

Henry A. Herrman

Henry Herrman is a licensed attorney in CA and NY. His work focuses on commercial real estate. Having been a partner in a premier LA-based law firm, he now runs a mobile solo practice coast to coast.

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hah@herrmanlawfirm.com

Expertise and Experience

- Commercial real estate, leasing, landlord-tenant, construction, finance, real estate joint ventures and business transactions; landlord-tenant, lease, contract and construction litigation.
- Practice includes: Drafting, negotiating all real estate related transactional and joint venture agreements, loan documents, construction agreements (including AIA),
- development agreements, and related real estate development documentation; real estate litigation matters, including UDs, breach of lease/guaranty, related disputes.

Representative Experience

- Represent publicly traded commercial real estate landlords owning and managing over twelve (12) million square feet of first class high-rise multi-tenant office and retail projects in downtown Los Angeles (including, e.g., Wells Fargo Center, US Bank Tower, City National Plaza, California Plaza), and low and mid-rise office projects in other areas of Los Angeles, Orange and San Diego Counties (e.g., Sunset Media Tower in Hollywood, the Water Garden in Santa Monica; and Park Place in Irvine).
- Represent small to mid-size office and retail landlords for negotiating leases, asset management agreements, financing documents and construction agreements.
- Tenant representation for office, retail and industrial leases in downtown and suburban office, retail, industrial, residential and mixed-use projects throughout California.
- Represent national developer in negotiating and drafting architect agreements, contractor agreements, consulting agreements and related documents for first-class hotel and resort, spa, private residences, and golf-course redevelopment.
- Represent private equity firms in multiple joint venture transactions, including negotiating and documenting joint venture agreement, forming and documenting corporate formation, form leases, management agreements, and related documentation.
- Represent local and national real estate owners and investors in the acquisitions and dispositions of over $5 billion of office, residential, and retail properties, including purchase and sale agreements, due diligence matters, closing documents, and coordinating multiple concurrent escrow closings in single transactions.
- Represent apartment building owners in residential landlord-tenant matters, evictions, asset management and financings. Represent individual tenants in same.
- Represent fixed based operators (FBOs) at general aviation airports, drafting and negotiating hangar, office, and ground leases, related agreements, and disputes

Academic Background

J.D. (2001), Southwestern University School of Law, cum laude and Dean’s Merit Scholar; Associate Editor, Southwestern University Law Review; President, Southwestern University Land Use and Real Estate Society; B.B.A. (1991) cum laude in Finance (1991), Fort Hays State University, Kansas; Judicial Extern to the Hon. Harry Pregerson, 9th

Circuit Court of Appeals (1999-2000); Judicial Extern to the Hon. Kathleen T. Lax, U.S. Bankruptcy Court, C.D. Cal. (2000).

Professional Affiliations

- Admitted to the bar in California (2001) and in New York (2003); U.S. District Court, Central District of California.
- Licensed California Real Estate Broker.
- Member, American Bar Association; State Bar of California; New York State Bar Association; Los Angeles County Bar Association (Real Property Section; Land Use Section); California Association of Realtors, Urban Land Institute.

Publications; Presentations

- Residential and Commercial Leases and Landlord-Tenant Law Panel Member; Sterling Education Services Conference Series; January and April 2015
- “Elements of a Real Estate Loan - A Primer,” (Co-Author), Los Angeles County Bar Association Real Property Section Review (Summer 2005).
- “Mezzanine Financing: He Who Holds the Cash is King,” Los Angeles County Bar Association Real Property Section Review (Winter 2005).
- Privity: How HUD Avoided Contract Liability Under ELIHPA and LIHPRHA,” Southwestern University Law Review (Vol. 30, 2001).

Honors & Awards

- Super Lawyer in Real Estate Law, Southern California Super Lawyers, selected by Law & Politics Media, Inc. (2012 - 2017).
- Young Lawyer of the Year Award Los Angeles County Bar Association Real Property Section (2008)

Angie Jacques, BA is the owner of Take Shape With Angie LLC and Yoga on North in Willimantic, CT.

Angie runs classes and workshops throughout New England. Her mission is to inspire and motivate students to take an active role in their physical and mental well-being through movement, meditation and the healing art of reiki.

When she isn't doing yoga, you can find Angie on her mountain bike or skiing around the woods of New England. www.takeshapewithangie.com

Attorney **Christopher P. Kriesen** is the founder and principal of the Kalon Law Firm, LLC. He formed the firm in 2017 to fulfill his vision of a better way to practice law, serve clients, and promote social good through entrepreneurship. He leads the firm and serves as the ethics officer.

Attorney Kriesen has tried cases in State and Federal Court, has argued appeals before Connecticut's Appellate and Supreme Courts, and has helped prepare amicus briefs on issues raising cases of first impression before the Supreme Court.

He is a trained mediator (Harvard Law School, Advanced Mediation Workshop, Program on Negotiation and the Quinnipiac School of Law Center on Dispute Resolution). He serves as an Attorney Trial Referee, Fact Finder, and Arbitrator in the Hartford Superior Court.

He has taught advocacy to students at the University of Connecticut School of Law. He is an active presenter at legal seminars for other lawyers and a mentor to law students and young lawyers.

He established the Kalon Fellowship, the Kalon Human Rights Clinic, Salons, Workshops, the Cicero Advocacy Project, and the Kalon ADR Center (which, as of September 1, 2018, donates 10% of its revenue to fund a scholarship for a graduate of the Hartford Youth Scholars Steppingstone Academy to help with their continuing education) making Kalon unique among peer firms in promoting social good.

He lives in West Hartford with his wife and his daughter attends Brandeis University.

Adriana Linares is a law practice consultant and legal technology trainer with her company, LawTech Partners. The firm's services include consulting and training for law firms, legal departments, legal aid groups, and legal technology startups.

Having spent her initial career-years at two of Florida's largest law firms, Adriana went on to launch LawTech Partners in 2004. She is a frequent speaker at national technology conferences and a regular contributor to legal blogs and publications and speaks fluent Spanish. Adriana has a BA in Geography from Stetson University, an MA in Corporate Communication and Technology from Rollins College and is an IAPP Certified Information Privacy Technologist. She is a 2013 Fastcase 50 honoree, recognizing "the law's smartest, most courageous innovators, techies, visionaries, and leaders," and was profiled as a Legal Rebel Trailblazer by the ABA Journal in 2018. She served as Chair of the American Bar Association TECHSHOW 2017. Adriana has hosted the New Solo podcast on the Legal Talk Network since 2014.

While she continues her work helping law firms and legal organizations, she also serves as a technology consultant the Florida Bar Board of Governors and is the Member Technology Office of the San Diego County Bar Association.

Ryan McKeen is a personal injury lawyer at Connecticut Trial Firm, LLC and co-author of the upcoming book *Tiger Tactics: Powerful Strategies for Winning Law Firms*.

FRIDAY 5+ TECH TIPS

Tips for Choosing Practice Management Software

By The Editors

With so many choices (and new features being added constantly) shopping for practice management software can be overwhelming. So we asked the practice management technology experts for a little perspective. First a little help with the basics: What's their best advice on making the decision, especially for smaller firms considering switching programs or investing for the first time? Then, what's the "next big thing" for practice management software? Is the future here?

Heidi Alexander: Make a List

With now countless options for practice management programs, the search for the right fit can be daunting. Start by making a list of all features you'd like from your ideal practice management program. Next, prioritize those features. By using your feature list, along with your budget, you can home in on programs that might work in your practice. Look for the programs that excel in the features you need most, whether that is document management and automation, online payment processing, client collaboration tools, or financial management and accounting.

Before you make a decision, also consider the company's reputation, how long they have been in business, security and service policies, support and training resources, user interface and ease of use, and integrations with other products.

What's next? Somewhat due to competition in the legal marketplace among lawyers and law firms, we're starting to see practice management programs incorporating more "sales" type features, which are typical of customer relationship management (CRM) systems (still not yet common in the legal industry). These features — lead tracking and analytics, intake automation and online engagement letters — help attorneys to efficiently and effectively convert more potential clients into clients. For an example of one such program, take a look at Lexicata, a cloud-based CRM program for lawyers.

Heidi S. Alexander *(@HeidiAlexander) is a law practice management advisor at the Massachusetts Law Office Management Assistance Program (MassLOMAP), where she advises lawyers on practice management matters and in implementing new technologies. She frequently makes presentations to the legal community and contributes to publications on law practice management and technology.*

Sharon Nelson: Cloud or On-Premise?

The first decision is whether to use a cloud or on-premise system. After that, you need to decide on features. Do you need a full-blown (accounts receivable, accounts payable, trust accounting) billing implementation? What about the ability to have custom fields? Integration with a document management system? Remote-access capability? Access via a mobile device? Document automation? Client portal access? Basically, deciding your feature requirements will help narrow your choices.

What's next? The next big thing is user-controlled encryption. Allowing the end-user to control encryption keys prevents unauthorized access to confidential client information by the cloud provider if you are using a cloud-based system. As we say a lot, when it comes to user-controlled encryption, the time is now.

Sharon D. Nelson *(@SharonNelsonEsq) is President of Sensei Enterprises, Inc., a digital forensics, legal technology and information security firm. She has written or co-authored a number of books, including "The Solo and Small Firm Legal Technology Guides." She blogs at Ride the Lightning and co-produces the podcast The Digital Edge: Lawyers and Technology.*

Diane Ebersole: Pros and Cons of SaaS and Proprietary Apps

Deciding which practice management software to bring into your firm is a big decision. Invest the time and energy in the shopping process that it deserves.

Determine the importance of mobile access. If you're one of the many solo or small firm attorneys who work 24/7, mobility may be the key factor in making your decision. A cloud-based application might be best for the mobile attorney. However, proprietary applications are changing and providing accessibility options that were formerly only available in SaaS programs. (Check out the Tabs 3 Connect option as an example.)

Learn about the differences between SaaS and proprietary applications. Be sure you understand the pros and cons to make the best decision for your firm.

Do a thoughtful, honest assessment of what you really need and what you are likely to use. If you have staff, garner their input and incorporate it into the decision. Lawyers are often reticent to do their own due diligence when making software decisions. Invest the time to test each application's user interface and ask for demonstrations from each provider.

Call your practice management advisor if your state has one. We love to talk technology.

What's next? Recently, practice management software offerings have focused on doing everything: time, billing, email, calendaring, documents, portals. Many small firms have very good systems in place and have no interest in changing *everything*. Watch for applications that provide secure document-centric services for mobile lawyers and their clients without total practice management features.

***Diane Ebersole** (@DianeEbersole) is Assistant Division Director, Member & Communications Services Division, Practice Management Advisor for the State Bar of Michigan.*

Catherine Sanders Reach: Demo Office-Wide

Even before you install a trial version, get a demo of the software and make sure everyone in the firm sits in on the demo. If they can't make it, get a separate demo for them. Your office manager, accountant, receptionist, paralegal and lawyers all have different jobs to do and they all need to develop questions and provide input. By getting feedback from everyone, you will eliminate the need for a trial version in many cases because the software does not meet your needs. That said, do not skip the trial even if the person doing the demo seems to have a good answer for everyone's questions.

What's next? I am seeing more products that either tailor a product toward one or two practice areas or try to anticipate the needs for fields based on the matter type entered — for instance, choose "personal injury" as matter type and new fields are automatically added. Many attorneys feel the practice-specific products are too narrow or expensive, but general practice management products require a significant time commitment to customize for each practice area. By leveraging intelligence gathered from other users and anticipating custom fields based on practice area, the product can be responsive "out of the box" and may get more firms up and running and satisfied with the experience.

***Catherine Sanders Reach** (@CatherineReach) is Director, Law Practice Management and Technology, for the Chicago Bar Association. She was previously Director of the American Bar Association's Legal Technology Resource Center for over 10 years.*

Jim Calloway: Put in the Time – Now!

"What practice management software package should I choose?" That question from a lawyer is one of my most common these days. It is my least favorite question to receive; but also my most favorite. It is also by equal measures the easiest and the hardest to answer. How can that all be?

It is among the most common because lawyers are increasingly recognizing that using today's powerful data management tools to run their law practice is no longer optional. The client file is really client data. You should not be wasting time looking for lost files or lost documents when practice management software, powered by enforced law firm policies about the new way of doing things, can virtually eliminate lost files or lost documents. I'm thrilled the lawyer is asking this most important question, but also feel a bit of apprehension because the lawyer is not going to love my answer. I'm also very pleased that the lawyer is contacting me directly instead of delegating this incredibly important decision to staff.

The short answer is that lawyers have to do the research themselves. There are many online reviews, websites, legal technology conferences, local consultants and other sources of information to help. In many states, you can call on your bar's practice management advisor for advice. But the lawyers who will be using this tool every day, and using the interface for hours on end, must be directly involved in the decision-making process or there could be disappointment. And, generally, the smaller the law firm, the more important it is that the lawyers personally make the decision.

I recall one solo who absolutely loved a practice management tool that few "experts" believed to be appropriate in a sole practitioner setting. The bottom line, as she explained to me, was that this software worked the way her brain worked and that the many powerful tools were all located just where she thought they should be and functioned as she assumed they would. One cannot discover that without a hands-on trial.

The good news (and the bad news for those wanting a simple decision) is that we have seen many new practice management solutions emerge recently, with different focuses and strengths.

- Reports on lawyer productivity may be your most important concern. That will eliminate some products and elevate others.
- Automated document assembly from the information contained in the PMS may be very important to you or perhaps integrated accounting or trust accounting tools may be what you seek. Again, this informs your decision-making.
- An attractive dashboard that is visually appealing to you may be high on your list.
- The method by which you would do remote billing on your mobile device may be your guiding star.
- Cost may be a significant concern. But this is an important tool you will be using daily. So this is not the time to become overly thrifty.

All of the tools are evolving works in progress and will continue to be so for several years. They will add new features. But you cannot let this fact justify further procrastination. You must transform your paper client files into digital client files that contain scanned copies of all of the documents. You must train your lawyers to enter their time or other billing information digitally (even if they are a two fingered typist) to reduce the delays associated with proofreading and correcting pre-bills.

There will be improvements in these tools in the future, but you need to become more effective and more productive now.

Put in the time. Do the research. Ask informed questions of your IT support team and outside experts who are familiar with these tools. But make a decision soon! Do not let the possibility of a hypothetical perfect product emerging be the enemy of a "good enough" choice for your firm. All of these tools are superior to paper client files.

What's next? The next big thing is available in most of the tools already. You can now share documents and other information with your clients via secured, password-protected client portals. Whether you do this within your practice management software or by using standalone software, it is time to stop sending out important client documents with confidential information as email attachments. You can provide better security and your client can receive a better service if the client has a place to log into and review all of their documents associated with their file. Practice management software means that you can have access to a complete client file even when you are geographically remote from your office. Isn't it a great idea to provide the same convenience to your clients?"

Jim Calloway *(@JimCalloway) is Director of the Management Assistance Program for the Oklahoma Bar Association and author of several ABA books. He blogs at Jim Calloway's Law Practice Tips and co-produces the podcast The Digital Edge: Lawyers and Technology.*

FOR MORE TECH TIPS FROM THE PROS, CLICK HERE.

Selecting a Practice Management Program and How It Can Mitigate Risk

Session Description

Attorneys have been subjected to substantial sanctions for their (or their staff's) ignorance, or even reckless disregard, in handling client documents, data, communications and other electronic exchanges. This session will explain the ethical implications of dealing with law office technology and provide legal professionals with the knowledge to avoid ethical dilemmas others have faced. We will discuss common claims and how technology can assist in preventing them.

- **How to prevent clerical errors and administrative failures using matter management and trust accounting**
- **Performing effective conflict of interest searches**
- **Using calendaring software to prevent missed deadlines, missed filing dates and failure to react to calendar (including automated court rule calculations)**
- **How an integrated document management system can prevent lost, misplaced or misfiled documents**

**This course is typically delivered using the Clio practice management system, the concepts and processes are applicable to many other cloud based and traditional programs.*

Largest number of claims stem from four key practice areas.

Area of Practice	Responses (by percentage)							
	2017	2016	2015	2014	2013	2012	2011	2010
Trust and Estate	56	56	56	67	50	57	0	33
Corporate & Securities	56	56	33	56	63	57	67	33
Business Transactions/Commercial Law	56	67	67	56	50	43	67	50
Real Estate	67	44	56	44	63	86	67	67
Collection & Bankruptcy	22	11	0	11	0	14	33	33
General Litigation	11	11	11	11	0	0	17	0
Taxation	0	0	11	0	25	14	0	0
Personal Injury Plaintiff	11	22	22	0	13	14	33	17
IP	0	0	0	0	13	0	0	17
Family Law	0	0	0	0	0	0	17	0
Litigation Defense	0	11	11	0	0	0	0	17

Source: Ames and Gough LPLI 2018 Claims Survey

Substantive vs Administrative Errors

Substantive

- 46 percent of reported claims
- failure to know or properly apply substantive law
- Inadequate investigation or discovery of facts
- failure to know or ascertain a deadline
- “dabblers,” or lawyers acting outside of their usual practice area, are far more likely to fail to know or apply the law

Administrative

- 28.5 percent of reported claims
- failure to manage time, tasks, firm and staff
- failure to file documents (#1)
- failure to calendar
- administrative errors are probably the easiest to prevent

ABA Model Rules and Technology

- 1.1 Competence
- 1.1.8 Technology
- 1.6 Confidentiality of Information
  - Protection of [privileged] information
  - Confidential communications
  - Prevent inadvertent/unauth disclosure (lost laptop, email wrong person, metadata)
  - Preserve confidentiality
- 1.4 Communications

Importance of Technology Competence

- ABA Model Rules - Amended Comment 8 to Model Rule 1.1

  "To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, **including the benefits and risks associated with relevant technology**, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject."

- "Diligence" - a lawyer shall act with reasonable diligence and promptness in representing a client

Questions to Ask

- Is your practice powered by technology that helps you adequately represent your clients?
- Are you meeting the current and ever changing standard of care?
- Are you and your attorneys and staff technologically competent?

Administrative Errors

- Tickler System Errors/Failure To Calendar Properly
- Failure To Supervise / Delegation Errors / Work Delegated To An Employee That Is Not Checked
- Clerical Error
- Document Errors
- Error In Math
- Lost File, Document Evidence
- Preservation of Confidential Information
- Conflict Checks

Profile of Legal Malpractice Claims studies by the ABA (Oct 2012)

training@lawtechpartners.com | 407.409.8828

How Can Practice Management Programs Can Help

- ✓ Manage information by matter
- ✓ Schedule, manage and meet deadlines
- ✓ Manage task
- ✓ Merge into new documents
- ✓ Conflict Checking
- ✓ Track time more accurately
- ✓ Balance accounts
- ✓ Track payments
- ✓ Categorize expenses
- ✓ Manage assets
- ✓ Manage Trust Accounts

a limitation period was known but not properly entered in a calendar; the limitation period was correctly entered but missed owing to a failure to use or respond to the tickler reminder; error either in determining what deadline applies, or in calculating when the deadline occurs; failure to respond to remind

FAILURE TO REACT TO CALENDAR OR A DEADLINE

Digital Calendaring and Task Management

- Calendaring important dates and deadlines
  - Avoid errors
  - Reminders of deadlines and pending and past tasks
  - Auto calculate dates/deadline
  - Chained events
  - Staff vs software tool (Clio Court Rules)
  - Link back to matters to see all completed and uncompleted tasks by matter

- Work delegated to an employee that is not checked or the type of error which would be disclosed by effective proofreading
  - Error in typing a legal description, the transposition of numbers
- Administrative failure to carry out the attorney's instructions
  - Clerk not following instructions to send an item by certified mail
- Staff does not have the technical competence to carry out a task
  - View and remove tracked changes from a document

FAILURE TO SUPERVISE / DELEGATION ERRORS / CLERICAL ERROR

Managing your Staff

- Automation of document creation minimizes risks of document / content errors
- Using a centralized calendaring and contact database helps with checks and balances
  - Change an address in one place, it changes everywhere
- Delegate and manage tasks using a PMS or Outlook
- Understand what your staff SHOULD know how to do
  - "Word doesn't do that"

Incorrect address referenced, document number not updated; errors in tax computations, real estate closing statements or interest calculations

DOCUMENT / MATHEMATICAL ERRORS

Automation

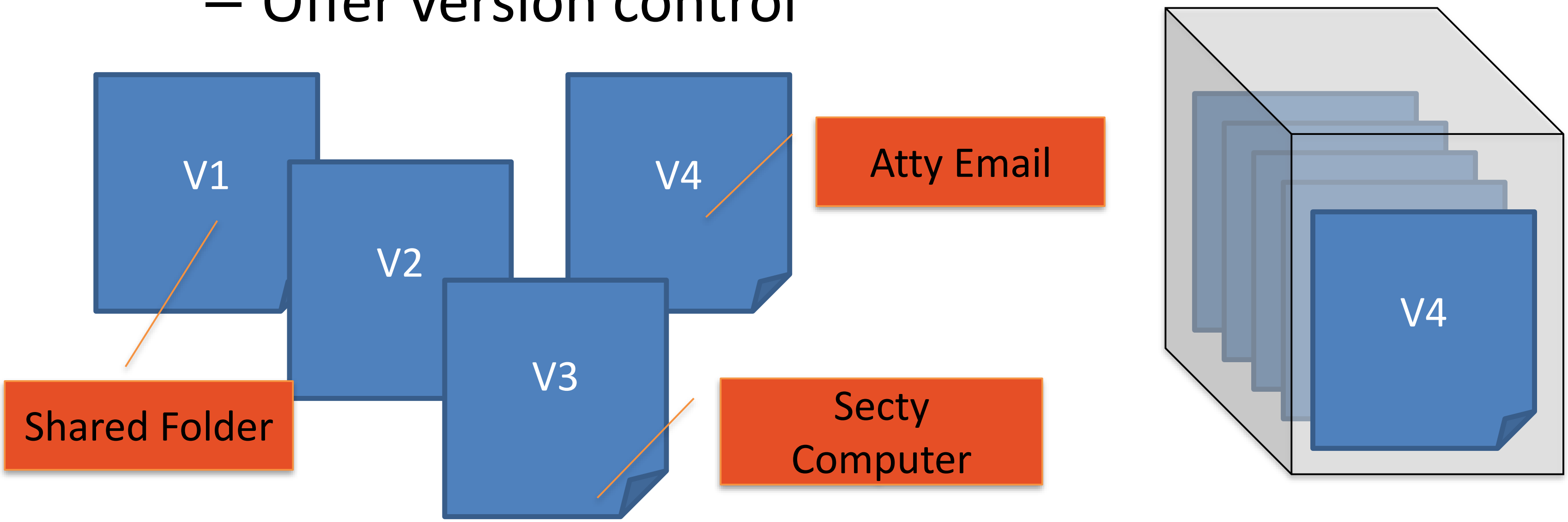
- Automation = Consistency
  - Autotext , Autocorrect
  - Forms, standard docs, correspondence, templates
  - Document assembly
- Benefits
  - Efficiency
  - Reduces Errors
  - Attorney and staff time savings
  - Better, faster client service
  - Knowledge sharing

instances where the alleged error was due to a lost file, document, or evidence

LOST FILE, DOCUMENT EVIDENCE

Managing Files with a CMS

- Help with the saving, organizing, searching and retrieval of all matter related files / documents, images, PDFs, emails and even voice mails
- See all parties involved
- Offer version control



"(a) A lawyer shall not reveal information relating to representation of a client unless the client consents after consultation, except for disclosures that are impliedly authorized in order to carry out the representation,…"

PRESERVATION OF CONFIDENTIAL INFORMATION

Preparing and Sharing Documents

Legal Professionals who do not understand the risks (but often benefits) of document processing and sharing

- "Metadata"
- Comments and Notes
- Track changes
- Reality of PDF Files

Typical Tasks – Big Risk

- Copy and Paste
- Dupe & Revise
- Create “versions” of a document
- Email Documents
- Create PDF files to prevent docs from being “changed”

the principal error is that the lawyer allegedly had a conflicting interest to that of the client. It applies whether the lawyer knew or did not know of the conflict.

CONFLICT CHECKS

Can be substantive or admin error

- Have procedures in place for checking conflicts at the *earliest* point in matter development
- An electronic system that includes:
  - client names
  - individuals, entities, corporations, affiliates, officers and directors, partners, trade names related to a client
- Check conflicts relating to the lateral hires

Risk: IT Management

- Understand your core competencies
- Strike a balance between in house abilities and outsourcing for more intense tasks
- Hiring consultants or IT staff with no to low legal technology experience or little understanding of the business AND practice of law

Risk: Outdated Business Practices

- That's the way we've always done it!
- Yielding to 'Old Guard' mentality
- Only one person in the firm knows how to do "it"
- Is WordPerfect outdated?

Risk: Failing to Budget for Training

- Failure to offer/deliver training
  - New systems, software, hardware
  - Ongoing
- Budgeting includes TIME
- Staff will ‘self train’ to meet the minimums and just get the job done

Please contact us with questions and your future training needs!

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Adriana Linares is a legal technology consultant with her company, LawTech Partners. Using her practical and personal approach to technology she helps legal professionals use technology to maximize skills and investments through training and consulting. She served as Chair of ABA TECHSHOW 2017; works as a technology consultant to the Florida Bar Board of Governors and is the Member Technology Office of the San Diego County Bar Association. Listen to Adriana as she hosts monthly episodes of the New Solo podcast on the Legal Talk Network.

Microsoft

Office

Remove hidden data and personal information by inspecting documents, presentations, or workbooks

Excel for Office 365, Word for Office 365, PowerPoint for Office 365, Excel 2019,

When you share an electronic copy of certain Office documents with clients or colleagues, it is a good idea to review the document for hidden data or personal information. You can remove this hidden information before you share the document with other people. The Document Inspector feature in Word, Excel, PowerPoint, or Visio can help you find and remove hidden data and personal information in documents that you plan to share.

Hidden information can include:

- hidden data or personal information that you might not want to share in Word documents
- data Excel adds to a workbook when you collaborate with other people
- hidden data or personal information in a PowerPoint that might be stored in the presentation or its metadata
- document information and file properties in Visio documents

Note: Unless you send your document to Microsoft, Microsoft does not have access to any information from your document.

This article describes the types of information that are typically stored in Office documents so that you can decide what to keep and what to remove in the document or metadata. There is some information that the Document Inspector cannot remove, explained in the tables that accompany more details about Word, Excel, and PowerPoint.

Word **Excel** **PowerPoint** **Visio**

An electronic copy of a Word document that you share with clients or colleagues often contains hidden data or personal information that is stored in the document itself or in the document properties or metadata.

Tip: If you're just looking to not print comments, go to **File** > **Print**, click **Print All Pages** and uncheck **Print Markup**.

Types of hidden data and personal information

Word documents can contain the following types of hidden data and personal information:

- **Comments, revision marks from tracked changes, versions, and ink annotations** If you've collaborated with other people to create your document, your document might contain items such as revision marks from tracked changes, comments, ink annotations, or versions. This information can enable other people to see the names of people who worked on your document, comments from reviewers, and changes that were made to your document, things that you might not want to share outside of your team.
- **Document properties and personal information** Document properties, or metadata, include details about your document such as author, subject, and title. Document properties also include information that is automatically maintained by Office programs, such as the name of the person who most recently saved a document and the date when a document was created. If you used specific features, your document might also contain additional kinds of personally identifiable information (PII), such as e-mail headers, send-for-review information, routing slips, and template names.
- **Headers, footers, and watermarks** Word documents can contain information in headers and footers. Additionally, you might have added a watermark to your Word document.

- **Hidden text** Word documents can contain text that is formatted as hidden text. If you do not know whether your document contains hidden text, you can use the Document Inspector to search for it.

- **Document server properties** If your document was saved to a location on a document management server, such as a Document Workspace site or a library based on Windows SharePoint Services, the document might contain additional document properties or information related to this server location.

- **Custom XML data** Documents can contain custom XML data that is not visible in the document itself. The Document Inspector can find and remove this XML data.

Find and remove hidden data and personal information with the Document Inspector

You can use the Document Inspector to find and remove hidden data and personal information in Word documents. It is a good idea to use the Document Inspector before you share an electronic copy of your Word document, such as in an e-mail attachment.

> **Important:** We highly recommend that you use the Document Inspector on a copy of your original document, because it is not always possible to restore the data that the Document Inspector removes.

1. Open the Word document that you want to inspect for hidden data and personal information.

2. Click the **File** tab, click **Save As**, and then type a name in the **File name** box to save a copy of your original document.

   > **Note:** In Word 2007: Click the **Microsoft Office Button** , click **Save As**, and then type a name in the **File name** box to save a copy of your original document.

3. In the copy of your original document, click the **File** tab, and then click **Info**.

   In Word 2007: In the copy of your original document, click the **Microsoft Office Button** , point to **Prepare**, and then click **Inspect Document**. Skip step 4, and proceed to step 5.

4. Click **Check for Issues**, and then click **Inspect Document**.

5. In the **Document Inspector** dialog box, select the check boxes to choose the types of hidden content that you want to be inspected.

6. Click **Inspect**.

7. Review the results of the inspection in the **Document Inspector** dialog box.

8. Click **Remove All** next to the inspection results for the types of hidden content that you want to remove from your document.

Important:

- If you remove hidden content from your document, you might not be able to restore it by clicking **Undo**.
- If you want to remove hidden data and personal information from documents that you save in the OpenDocument Text (.odt) format, you must run the Document Inspector every time that you save the document in that format.

What the Document Inspector finds and removes in Word documents

In Word, the Document Inspector displays several different Inspectors that allow you to find and remove hidden data and personal information that is specific to Word documents. For a list of the different types of hidden data and personal information that the Document Inspector can find and remove from Word documents, review the following table.

Notes:

- If your organization customized the Document Inspector by adding Inspector modules, you might be able to check your documents for additional types of information.
- If you are using Microsoft Word Starter 2010, not all the features listed for Word are supported in Word Starter. For more information about the features available in Word Starter, see Word Starter feature support.

Inspector name	Finds and removes
Comments, Revisions, Versions, and Annotations **Note:** In Word Starter 2010, Document Inspector removes only versions and annotations.	▪ Comments ▪ Revision marks from tracked changes ▪ Document version information ▪ Ink annotations
Document Properties and Personal Information	▪ Document properties, including information from the **Summary**, **Statistics**, and **Custom** tabs of the **Document Properties** dialog box ▪ E-mail headers ▪ Routing slips ▪ Send-for-review information ▪ Document server properties ▪ Document Management Policy information ▪ Content type information ▪ Databinding link information for databound fields (last value will be converted to text) ▪ User name ▪ Template name

Inspector name	Finds and removes
Headers, Footers, and Watermarks	- Information in document headers - Information in document footers - Watermarks
Hidden Text	Text that is formatted as hidden (a font effect that is available in the **Font** dialog box) **Note:** This Inspector cannot detect text that was hidden by other methods (for example, white text on a white background).
Custom XML Data	- Custom XML data that might be stored within a document
Invisible Content	Objects that are not visible, because they have been formatted as invisible. **Note:** This Inspector cannot detect objects that are covered by other objects.

We're listening!

This article was last updated on **January 9, 2018**, as a result of your comments. If you found this article helpful, and especially if you didn't, please use the feedback controls below to leave us some constructive suggestions as to how we can make it better.

Get support

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Thank you for your feedback!

Saving WordPerfect Files Without Metadata

Saving WordPerfect Files Without Metadata

by Laura Acklen

According to Wikipedia, the word "metadata" comes from the Greek word "meta" and the Latin word "data," so its literal meaning is "data about data." A library catalog is considered metadata because it contains information about publications. In recent years, the term has been used to describe hidden data that is stored within a document. We frequently hear news reports about how the discovery of metadata exposed information that was meant to be kept secret.

This issue is particularly sticky for law offices. Legal information is often confidential, and its inclusion within files could be detrimental to court cases or contract negotiations. Attorneys state that sending documents containing metadata can lead to the disclosure of confidential client information and the breach of client/attorney confidentiality. As a result, the potential for malpractice claims increases. Given the strict confines of the client/attorney relationship, law offices cannot afford to send a document outside the firm without first cleaning up the metadata.

Fortunately, the issue of metadata is primarily a Microsoft® Word problem. Word stores information about a document in a hidden area at the end of the file. You can't access it, so you can't remove it. Although there are macro routines that can scrub this invisible area, they are not foolproof.

WordPerfect® handles metadata differently from Word. Features that might store hidden or attached data are readily available, so confidential or sensitive information can be removed from a file before it is shared electronically. This is one of the many reasons that legal professionals favor WordPerfect.

Where is metadata stored?

WordPerfect has several areas and features that can be used to store information about a document. You can enable or disable each of these options when you use the Save Without Metadata feature.

Undo/Redo history

As you use the Undo and Redo features, WordPerfect maintains a list of your actions. This list allows you to undo or redo an action if it is performed within a specific number of

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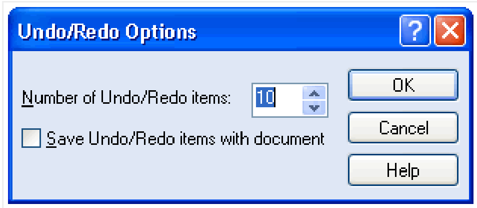
the most recent actions. The specific number of actions that can be undone or redone is set in the options for the Undo/Redo history. Choose **Edit > Undo/Redo History** to display the **Undo/Redo History** dialog box. Choose**Options** to display the **Undo/Redo Options** dialog box (see Figure 1). You can either type a new number of history items or use the arrows to increase or decrease the setting.



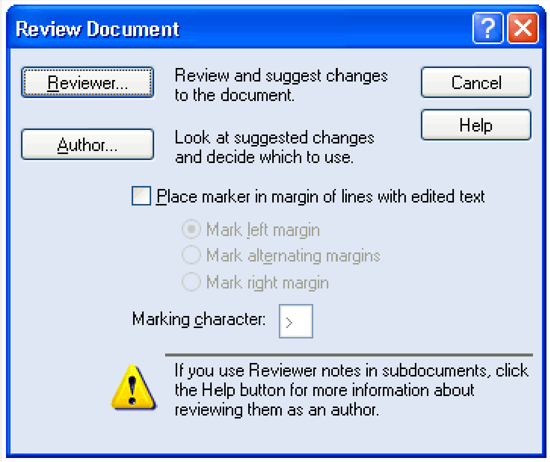
The number of undo/redo items can be set in the Undo/Redo Options dialog box.

Whether the Undo/Redo history is saved with a document depends on whether the **Save Undo/Redo Items with document** check box is enabled. If the option is enabled, that information is saved with the document, so whoever opens the document can access the information. For example, if you are negotiating a settlement, you would not want opposing counsel to know that you changed a figure from $300,000 to $1,300,000. For confidential or sensitive documents, the Save Undo/Redo Items with document check box should remain disabled so that WordPerfect removes the Undo/Redo history when the document is saved.

Reviewer's annotations

The Document Review feature is used to review a document and make changes. These changes are then accepted or rejected by the author. If you send the document to someone else without first accepting all of the changes, the recipient will be able to see the proposed changes.

The main difference between the Document Review feature in WordPerfect and the Track Changes feature in Word is that in a WordPerfect document, you see the Review Document dialog box whenever you open the document (see Figure 2), so you are less likely to forget that you have unaccepted changes in the document. In Word, you can simply hide the changes — Word never prompts you about them. You can easily forget they are there. Furthermore, if you are working with a document that someone else created, you won't know that the document contains unaccepted changes.



The Review Document dialog box appears each time you open a document that contains unaccepted reviewer's annotations.

Comment information

Through the Comment feature, you can insert information into a document that will neither be printed nor affect the pagination. The information that you put in a comment is saved in the comment code, so it isn't actually part of the body text. Typically, a comment contains the name of the person who created it. In some cases, comments contain the date and time of their creation.

If a user has entered their initials and selected a user color in the User Information section of the Environment Settings dialog box, their comment bubbles will appear in the user color and their initials will appear in the comment bubble. These small cues help you quickly identify who inserted the comment. You can quickly strip out the user initials and user colors with the Comment Information option in the Save Without Metadata dialog box. The comment text isn't touched and all of the comment bubbles appear with the same – as a generic white bubble.

Document summary data

When creating or saving a document in WordPerfect, you can save summary information within the document. By default, the following information may be present in the summary of a WordPerfect document (other fields can be added and used as well):

- Descriptive Name
- Descriptive Type
- Creation Date
- Revision Date
- Author
- Typist
- Subject
- Account
- Keywords
- Abstract

Hidden Text

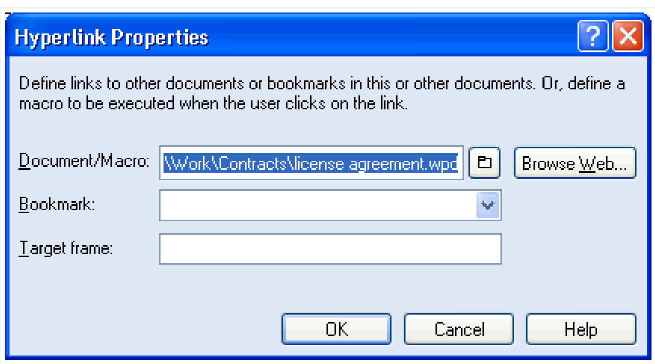
In WordPerfect documents, it is possible to assign a hidden attribute to text by selecting the text, choosing **Format > Font**, and then enabling the **Hidden** check box in the **Appearance** section). The display is toggled on and off with **View > Hidden Text** so someone can easily turn on the display and view the information. If the hidden text contains information that should not be distributed, it should be removed before sending out the file.

Headers/Footers

Headers and footers in documents may contain identifying information, such as the name of the person who last modified the document and the date and time the changes were made. Although this information is useful to you, it may not be appropriate to share with others.

Hyperlinks

WordPerfect documents may contain hyperlinks to other documents or Web pages on an intranet or the Internet. Hyperlinks typically appear as blue underlined text strings. The path and filename of the hyperlinked document can be viewed by looking at the hyperlink's properties (see Figure 3). If the recipients have access to the area in which the hyperlinked document is stored, they will be able to access the files that are hyperlinked.



The path and file name for a hyperlink can be viewed in the Hyperlink Properties dialog box.

OLE Object Information

OLE linked images and other objects may contain linking information, such as the path to the linked image or object. This information can be removed from the document by terminating the OLE link between the object and the associated application. Keep in mind that removing the link may mean that the image or object will no longer be editable from within WordPerfect.

If an object is embedded within a document, the object still retains its own properties, regardless of what is done to the document. These properties include any information not visible in the OLE box window in the document. In other words, if someone extracts an embedded object and opens it in its native application, all of the information that is saved with the object will be visible, including items that cannot be seen in the WordPerfect OLE interface.

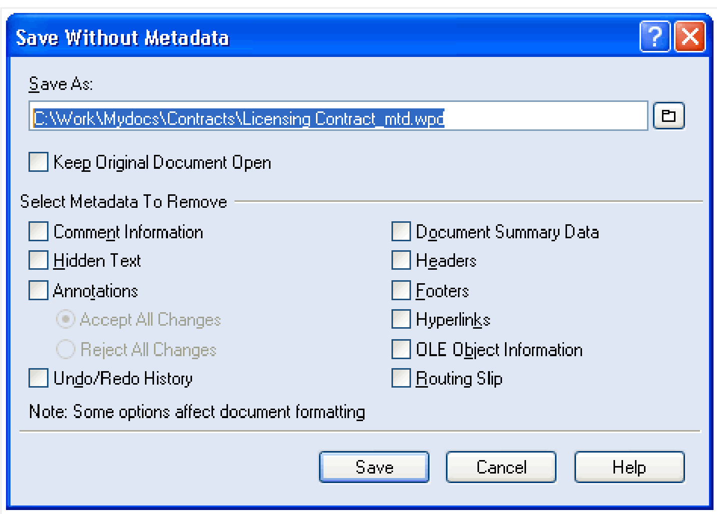
Routing Slip

Routing slips allow you to e-mail a document to multiple reviewers. Each reviewer opens the attachment, makes changes, then closes the document. The document is then sent to the next person on the **Reviewers** list. When the document has been edited by all of the reviewers, it is then sent back to you.

Using the Save Without Metadata Feature

In earlier versions of WordPerfect, the manual cleanup of metadata required a series of steps. Now, you can use a single dialog box to accomplish the same task. WordPerfect X3 introduces the Save Without Metadata feature to ensure that you'll never get caught with confidential or sensitive information in your documents. The new feature makes it simple to remove all metadata from a document, without having to purchase an additional utility or perform a series of manual steps.

To save a WordPerfect document without metadata, choose **File > Save Without Metadata**. The **Save Without Metadata** dialog box appears (see Figure 4). WordPerfect automatically adds **_mtd** to the end of the filename to identify that the file does not contain metadata. If you change the filename, take care not to remove the **_mtd**. If necessary, click the browse button to move to the drive and folder where you want to save the document.



The new Save Without Metadata feature makes it a snap to remove metadata from a document.

If you enable the **Keep Original Document Open** check box, both the original document and the metadata-free version remain open. Otherwise, the original document closes, and the metadata-free version remains open. Finally, specify which metadata elements to remove from the document by enabling the appropriate check boxes in the **Select Metadata to Remove** area, and click **Save**.

Was this article helpful? 0 out of 0 found this helpful

Have more questions? Submit a request

Metadata 101 for Lawyers

By Ali Moinuddin

Most lawyers have probably heard the word "metadata" and, at a minimum, know that it has something to do with their documents. But it's vital that every law office, staff included, is aware of the risks posed by metadata, and what steps can reduce the dangers.

A popular, if slightly ambiguous definition of metadata is "data about data." In fact, metadata is the hidden information that can be found embedded in electronic files. It may include transactional details about the document, such as author, software used, the date it was written and even edits made along the way. It occurs in many different forms and in a vast number of locations. In a Word document, for example, metadata can include tracked changes, comments, text smaller than 5 points, white text on any background and previous authors. The most potentially damaging of these can be the tracked changes or comments made in earlier versions.

Emailing documents adds another layer to the problem. In addition to metadata contained *within* the files you attach, information will also be available about the email message itself. Then there is the email manager, such as Outlook, and the metadata created at the other end upon arrival of the email. This proliferation of metadata from an individual document being emailed back and forth can begin to have a "Russian Doll" effect.

More on Metadata's Uses — And Concerns for Lawyers

Metadata serves a number of useful purposes, most notably to facilitate resource discovery, digital identification, electronic organization and archiving. Metadata is information that may be instrumental in providing a context for other information. It can also be viewed as evidence — some crucial, some less so. While metadata is usually harmless, depending on the context it can sometimes contain privileged, confidential or sensitive information. Therefore, it represents a significant client confidentiality concern for attorneys.

Metadata scrubbing, or "mining," tools can reveal tracked changes and notes on a document that could contain confidential information about a case or a client, such as their willingness to settle. Metadata may also contain elements of a document that had been deleted, perhaps because after consideration they were considered too revealing. This, of course, could have disastrous consequences.

Also, even though the majority of hidden metadata can only be uncovered with specialized software, there are some circumstances where metadata can be accidentally revealed — for example, where a file is corrupted or not converted properly and the metadata is displayed on the screen instead of the intended information. In the wrong hands, this potentially sensitive information could prove damaging.

In addition, many law firms use existing client documents as templates to create new client documents. This can certainly save time. However, deleted text may remain within the document as metadata. The risk is that clients may be able to access confidential information about other clients represented by the firm, or that opposing counsel will have access to information that was set out in a document while still in the drafting stages.

It's likely that any firm that has ever emailed a Microsoft Word or Corel WordPerfect document to opposing counsel or clients has unknowingly sent information that is confidential. As this ABA chart of various states' ethics opinions shows, there is ambiguity around the ethics of sending and receiving metadata. But clearly it's in every firm's best interests to stay on top of any risks involved, especially for clients.

Ways to Minimize the Risks Metadata Presents

While reverting to paper copies and paper mail is one way to guarantee metadata is not shared, this is rarely viable. To minimize the chances of a confidentiality breach, the best strategy is to make sure you and your staff are aware of the risks and then implement procedures to safeguard information before it leaves the firm.

What steps should you take?

You must eliminate — or at least reduce — the metadata contained within documents wherever possible. Even a simple understanding of the kind of metadata that can be created in common computer files, like a Word Document, can go a long way toward building awareness.

If you are sharing documents that need to be edited and returned to you via email, you could use "metadata scrubber" software to remove metadata from Word files before they are sent. A number of metadata scrubbers are available, including Metadata Assistant, Out-of-Sight, iScrub, Workshare Protect (my firm's product) and ezClean.

Before emailing documents outside the firm, you may also want to consider:

- Switching off "Fast Save" functions when using Microsoft Word, PowerPoint and Excel.
- Familiarizing yourself with the security settings in Microsoft Office products — in Office XP and Office 2003, for example, you can use the Security Tab to specify that some metadata not be saved.

- Adopting a policy that Adobe Acrobat always be used to convert documents to a “locked” PDF format *before* a file is sent. You can adjust Acrobat’s Security Options settings to add restrictions regarding certain metadata.

Ali Moinuddin *is Chief Marketing Officer at Workshare, which produces document comparison and review software for the legal profession. Ali has over 15 years of experience in supporting high-growth companies. Previously he was CMO at SkyDox, Director of Marketing at Interxion, Director of Marketing EMEA for SPL WorldGroup (now a part of Oracle), and Marketing Manager EMEA and Asia-Pacific at Kana. Follow him on Twitter @Ali_Moinuddin.*

Metadata and Ethical Responsibilities with Word and PDF Files

What is it?

- Information you don't normally see when opening a document but can be disclosed. Reveals information about electronic documents beyond the printable text
- Word metadata
  - Properties - visible
  - Track Changes -visible
- Can provide extensive information for building an electronic paper trail as to who created, read, or even deleted text from a particular document, whose computer it was stored on

Examples of Metadata

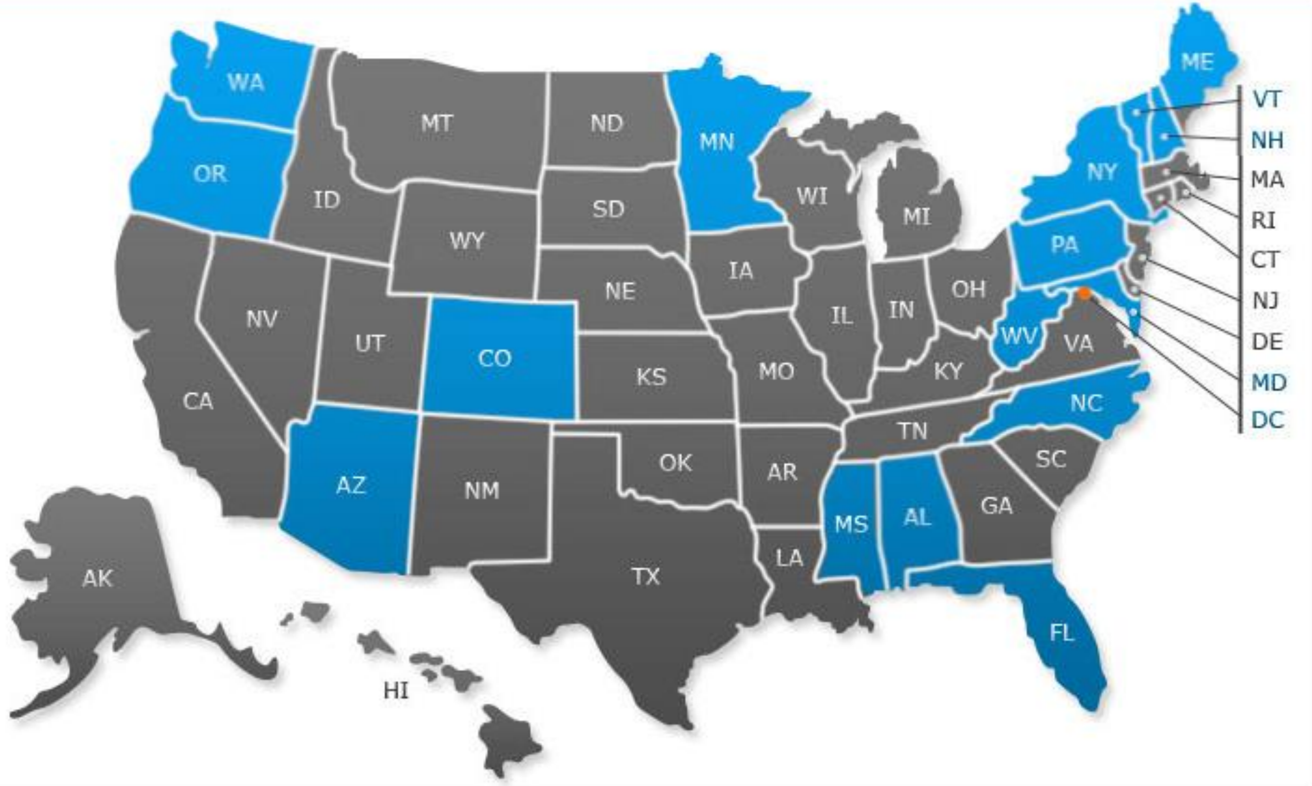
- Author/s
- Storage path
- Computer used
- Software used
- Edit Time
- Date printed
- Number of words in a document
- Tracked changes
- Firm or organization name
- Name of local hard drive or network server where document/s saved
- Name and type of the printer
- Names of previous document
- Document versions
- Information about any template used to create the file
- Comments
- Deleted comments
- Editorial comments
- Strategy considerations
- Legal issues raised by the client or the lawyer
- Legal advice provided by the lawyer

Potential Pitfalls

- You could voluntarily, but unknowingly, send confidential client communication to the opposing side
- Unwanted information that is included and delivered within files could be detrimental to court cases or contract negotiations
- Sharing documents containing metadata can lead to the disclosure of confidential client information and the breach of client/attorney confidentiality
- Potential for malpractice claims
- Can be a source of evidence

Metadata Ethics Opinions Around the U.S.

http://bit.ly/usmetadata



Metadata Ethics Opinions

Jurisdiction / Source	What is the Sender's Duty When Transmitting Metadata?	May the Recipient Review or "Mine" Metadata?	Must the Recipient Notify Sender if Metadata is Found?

ABA
American Bar Association Standing Committee on Ethics and Professional Responsibility

[Formal Opinion 06-442]
[Formal Opinion 05-437]

What are your ethical responsibilities?

- ABA technology-related amendments requiring lawyers to keep current on more than just changes in the law. Lawyers also have a duty to keep abreast of the benefits and risks associated with technology, according to new commentary language added to Rule 1.1 on the duty to provide competent representation.
- Maintaining Competence
  - [6] To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology,
- 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

What is the Sender's Duty When Transmitting Metadata? (ABA)

- **NONE**
- No explicit duty regarding metadata is imposed, but a number of methods for eliminating metadata (including "scrubbing," negotiating a confidentiality agreement, or sending the file in a different format) are suggested for attorneys who are "concerned about the possibility of sending, producing, or providing to opposing counsel a document that contains or might contain metadata." [06-442]
- Presumably, a lawyer's general duties with regard to the confidentiality of client information under Rule 1.6 apply to metadata.

Must the Recipient Notify Sender if Metadata is Found? (ABA)

- **YES**, if lawyer knows or reasonably should know that transmission was inadvertent.
- ABA Formal Opinion 05-437 cites the Rule 4.4(b) provision that a "lawyer who receives a document relating to the representation of the lawyer's client and knows or reasonably should know that the document was inadvertently sent shall promptly notify the sender." [05-437]
- The Opinion goes on to state that Rule 4.4(b) "obligates the receiving lawyer to notify the sender of the inadvertent transmission promptly" but "does not require the receiving lawyer either to refrain from examining the materials or to abide by the instructions of the sending lawyer." [05-437]

May the Recipient Review or "Mine" Metadata? (ABA)

- **YES**
- After noting that some authorities have found metadata mining "ethically impermissible," the Committee states that it "does not share such a view, but instead reads the recent addition of Rule 4.4(b) identifying the sole requirement of providing notice to the sender of the receipt of inadvertently sent information, as evidence of the intention to set no other specific restrictions on receiving lawyer's conduct found in other Rules." [06-442]

Live Demo in Word and Acrobat

Please contact us with questions and your future training needs!

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Adriana Linares is a legal technology consultant with her company, LawTech Partners. Using her practical and personal approach to technology she helps legal professionals use technology to maximize skills and investments through training and consulting. She served as Chair of ABA TECHSHOW 2017; works as a technology consultant to the Florida Bar Board of Governors and is the Member Technology Office of the San Diego County Bar Association. Listen to Adriana as she hosts monthly episodes of the New Solo podcast on the Legal Talk Network.

AMAZON AND THE SMALL LAW FIRM
By Ryan Mckeen
Connecticut Trial Firm, LLC

Amazon has 1.3 billion transactions per day. Your clients use Amazon. Your clients expectations are set by Amazon.

The problem is there is no Amazon Prime in law. You can't close on a house or get a divorce or settle a car accident claim by saying….."hey Alexa". At least not yet. Though it is not hard to imagine a day when this happens.

Consumer expectations and the legal process are at odds. And attorneys are caught in the middle of dealing with inefficient processes beyond their control and clients who have unrealistic expectations.

This presentation focuses on what firms can do to handle these difficult waters and seize the moment to thrive.

First Solution: Get Your House In Order

Every movement an Amazon employee makes is a carefully choreographed symphony. Law firms often have musicians playing their own instruments. This is not enough in today's Amazon world.

The Problem

"We're out of stamps".

Running a disorganized law firm is a death by a million paper cuts. And those papercuts harm your clients, your health, your employees, and your net profit. In 2018 it is inexcusable for organizational knowledge to exist in anyone's head. Doing so puts both your clients and your practice at risk.

Your employee not knowing how to obtain stamps can result in wasted time and undone work. And it is your fault.

When I was a solo, all of the necessary knowledge to run my firm was in my head. I knew how to print stamps. I knew how to order checks. And I knew who to call when the heat wasn't working.

The very notion of writing anything down seemed like a waste of time. I was busy trying to answer my phones, file pleadings, clean the office, meet with clients, pay bills, go to court, and if I was lucky deposit money into my operating funds. With young children at home there was time for little else but to complete the tasks in front of me.

So I did the next logical thing. I hired someone part time. She was in college, hungry for experience, and the price was right. What I needed her to do was simple enough – scan mail, run errands, organize medical bills, and answer phones. She was certainly smart and diligent enough to handle all of these tasks and more. I had hired her for the summer, with the idea that her presence may help me have some semblance of a vacation with my family.

I did take my vacation. But it was interrupted with texts and calls from my employee of "how do I do this?" By the end of the summer, I was happy she returned to school. Hiring an employee had created work for me. And it was all my fault. I had too much critical knowledge in my head.

But I still hadn't learned my lesson.

When it came time to hire again – I thought this time I'll get it right. I'll hire someone with loads of law firm experience. That will make my life easier. I won't have to explain as much. Things will just happen. So I did just that. And the result was the same. I kept ending up with more and more work as a result of having an employee. This situation did nothing except create stress while wasting time and costing us money.

This is how many law firms operate. Some firms have staff that operates with significant amounts of critical knowledge in their heads. It's not in the owner's head so in that sense it takes some load off the owner. But you still hear things like "we can't do X because employee A is out and she is the one who knows how to do whatever discrete task needs to be done".

Firms that continue to operate this way will face declining revenues before going out of business.

The Mindset

The good news is there is a solution to this problem. And it starts with a change in mindset.

For us, our mindset is clear – we went from focusing on solving the problem at hand (lack of stamps) to developing written procedures to solving the problem the next 1000 times it occurs. Businesses in general and law firms in particular face the same exact problems day in and day out. If a lawyer from the 1950s were to be faced with running my very tech forward firm, he may not recognize the technical aspects of our practice, but the problems would be very familiar.

Good firms identify those problems. And seek to fix them systemically. That change in mindset that we aren't just working on the problem of the day but rather we are working on the problems of the day and the problems of future days at the same time is the first step in lifting any practice out of chaos.

If you and everyone in your organization resists this notion none of what I am about to write will be of any use to you. You will fail.

The Tool

The tool is the wiki. Why a wiki and not something else like a word doc or a binder or a google doc? Wikipedia is one of the internet's great experiments. A globally crowd sourced database where anyone with internet access can add or change information. Wiki is the idea that knowledge should be democratic. Wikipedia does not rely on college professors or experts – it relies on the entire world.

And your law firm should be no different. Why?

First of all, if you document every written procedure it will take you a lot of time. And you will still have to do things like move cases. If your firm's centralized database is top down you will miss out on a lot of fruit. When a firm gets really ahead, everyone on the team is working to contribute what they know to the entire firm.

A wiki is also easy to use. It is easy to add pictures, links, videos, and text. And that is essential. A hard to use product is a product that no one uses.

So when you say that your firm is using a wiki you are saying something both technically true but also in a larger sense – culturally true.

Our firm uses and loves a product called Tettra (www.tettra.co).

Where To Start

You haven't stopped reading. This is a good thing. You are already ahead of your competition by virtue of having made it this far in the materials. And your asking yourself: where do I start? What do I document?

My answer to this is to start documenting the things you do most often (hint: filing mail) and then move into all things operational. Here are some ideas:

- How to order and make coffee
- What to do when your printer is low on toner
- Printing stamps
- Ordering office supplies
- Computer logins
- Where to find letterhead
- How to deposit a check
- How to send a fax
- What to do when there's a network problem
- Contact information for vendors you use
- How to handle phone systems
- Food allergies
- How to schedule appointments

The list is endless. As are the opportunities to not be called while you are on vacation. Starting by documenting the mundane operational tasks that your firm executes every day will yield your highest returns.

What To Do Next

Add your employee policies and procedures. Things like your holiday schedule, vacation schedules, sexual harassment policies, workers compensation carrier, dress code and anything else your employees need to know. The kind of information that if it exists in law firms it exists in binders no one reads and most of the time can't find.

Also create a locked page for your managers. We have one with how to access bank accounts, credit cards, passwords, and contains employee data. We don't share the page with everyone just those who need to know.

Document Your Legal Systems

No employee on your team should ever have to ask you "what marshal do we use in New London county" or "what documents do we need at intake" or "do you have a sample car accident complaint?" Your time is better spent doing other things. Document all of your legal processes. Any bit of information that may be useful should go in your wiki. For example, when you call New Haven court on a PJR ask for this clerk. Or when you need an OSHA report ask for this person. These little details can greatly impact how efficiently your firm operates.

We have everything documented from intake to how to do a closing argument and what post trial motions to file. And when we learn a better way to ask questions in a deposition, and we are always learning better ways – we update our wiki so our knowledge exists outside our heads. We aren't wasting time trying to find what we already know.

The Secret To Making It Work

We have a rule in our firm. Employees can ask me any question at anytime. But my first response is "did you check our wiki?" and if they haven't they are told to look there first. And if they have and there's no entry – once I answer the question they are told to add it to the wiki.

This way our wiki grows organically. And is used as a primary source for problem solving. I really don't want to be answering "here's who you call about our phones" when I'm on a beach. And you shouldn't either.

The Benefits

The first benefit is you will operate much more efficiently. The second benefit is that onboarding employees is much easier. Everything we do is in our wiki page. And if the employee can use a search feature they can answer their own questions. And one of the biggest benefits is that when you write something down you learn it. And by writing down your intake process you will see problems and be able to quickly fix them.

Did I mention you will be able to go on vacation without being texted about stamps?

Step 2: Communicate

Amazon is amazing at communicating updates. A customer is never left guessing about their order. Most law firm ethics complaints come from failing to communicate. You must invest in texting and client portals. This is what Amazon does. And it is what you must do.

Step 3: You Must Have A Good Product And People Have To Know About It

Reviews are necessary for conversion on Amazon. Reviews are necessary for conversion for law firms.

Step 4: You Must Operate 24/7

Amazon never sleeps. And nor can you. You must have a client portal. You should have your phone answered by a person 24/7/365. Consider the many virtual reception services that are out there.

Conclusion:

There is unparalleled opportunity for small law firms. Firms that act like Amazon and deploy the technical solutions available to them will thrive. Firms that do not will go out of business.

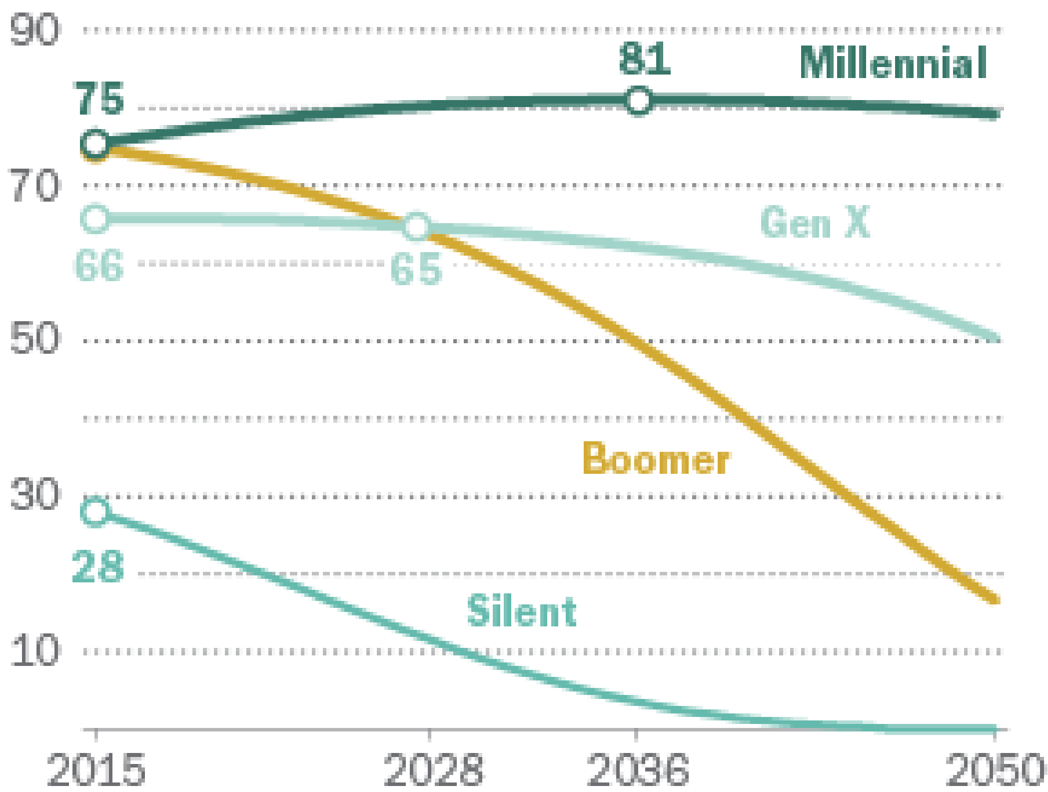
-

Amazon, Millennials, and You

Ryan McKeen
Connecticut Trial Firm, LLC

Projected population by generation

In millions



Note: Millennials refers to the population ages 18 to 34 as of 2015.
Source: Pew Research Center tabulations of U.S. Census Bureau population projections released December 2014 and 2015 population estimates

PEW RESEARCH CENTER

What Do They Want?

amazon®


Instant Pot
Soup/Broth
Meat/Stew
Cake
Egg
Rice
Multigrain
Porridge
Steam
Slow Cook
Adjust
Manual

Systems Win Championships

24/7 Access To Files.

Net Promoter Score

It’s all about the Benjamins

Show You Value

Jeff Bezos considers a customer needing to call Amazon to be a systems failure.

THIS WAY THERE BE DRAGONS!

Detect and Respond: Steering Your Firm Through Cyberthreats

Takeaways from the College of Law Practice Management Futures Conference.

By Heidi Alexander

"Cybersecurity: This Way There Be Dragons!" was the title of the 2018 College of Law Practice Management Futures Conference, held in Boston last week. This reference to the medieval practice of drawing mythical beasts on uncharted areas of a map couldn't be more appropriate. Over and over, speakers described cybersecurity as a moving target owing to the constantly evolving nature of cyberthreats. The first panel aptly quoted computer security expert Bruce Schneier:

> *"You can't defend. You can't prevent. The only thing you can do is detect and respond."*

"Detect and respond" was a major theme throughout the two-day conference. Gone are the days of the individual hacker. Hacking networks now span far and wide. These hacking rings are often sophisticated and well funded.

And hacking attempts are increasing. Nearly 1 in every 100 emails is reportedly a hacking attempt, and 90 percent of those attempts involve social engineering (impersonation with the goal to steal data or install malware in the future). So, it should come as no surprise that when asked, nearly every audience member indicated they had knowledge of a law firm or organizational cyberbreach. In fact, we have data to support this: In results from the 2017 ABA Legal Tech Report, 22 percent of responding law firms had suffered a breach. More than ever, it is imperative that attorneys and law firms remain vigilant.

Here are my conference takeaways aimed at helping to detect, respond and mitigate cyberthreats.

1. Law Firms Are Not Immune to Cyberbreaches

All the data suggest that law firms are, in fact, targeted due to the potentially vast amounts of sensitive data in their care. Major law firms such as DLA Piper, Cravath, and Weil Gotshal have suffered breaches that put their practices in the spotlight.

Of note, speakers mentioned a trendy law firm scam involving gift cards. The hacker either spoofs or gains access to a law firm partner's email address. The "partner" then emails a staff member with directions to buy hundreds of dollars' worth of gift cards. The "partner" then instructs the staff member to transmit the serial number on the gift cards via email. The hacker can then sell these serial numbers for virtual currency or cash. Because this is a cash transaction, it is not recorded and is difficult to track, report and stop.

2. Essential Precautions

What can your law firm do?

- First, if you haven't already, ensure that you are using strong unique passwords. Rather than affixing them to the side of your computer with sticky notes, store them in a password manager such as 1Password or LastPass.
- Second, update your systems on a regular basis and ensure that you take additional steps if necessary. For example, this Windows article references a subsequent configuration change recommended *beyond* the regular Window's update.
- Third, two-factor authentication should be used whenever and wherever possible. Google has its own authentication app, Google Authentication, but you can also use apps such as Authy, which aggregates two-factor codes for multiple applications. As noted by speakers, two-factor authentication, particularly when using it with text messaging, is not 100 percent impenetrable. Expect to see advancement in methods that don't involve passwords, similar to Apple Face ID and fingerprint recognition, which will help lower barriers to using secure methods.

3. Build a Culture of Security

Over and over, speakers pointed out the "human problem." In any organization, including law firms, the greatest security threat is the people. Firms must work to "build a culture of security" to decrease cybersecurity risks in these ways:

1. Teach people how their actions apply and impact everyone else in the firm.
2. Conduct regular awareness training and make it fun. (For example, use gamification when conducting phishing tests by giving a prize to the first employees to identify the phishing email.)
3. Use real-life examples in training. During the course of it, empower employees to come forward without shame, and to learn from mistakes.
4. Reward good behavior and adherence to security protocols.
5. Do not exempt leaders from participating in training. Rather, encourage leaders to model good behavior.

4. Resources for Your Firm

Guest speaker FBI Special Agent Timothy Russell echoed other speakers in saying the best you can hope for in the current landscape is to "detect and mitigate." Russell encouraged attendees to work with the FBI to help law firms into a better defensive posture and suggested that it would not necessarily result in an investigation. To provide awareness, Russell encouraged using the government's website, **IC3**, to report scams. Later in the day, John Simek, Vice President of Sensei Enterprises, suggested joining the FBI's public-private partnership program, **InfraGard**, to receive information regarding known cyberthreats.

If you need advice on how to conduct employee awareness training, the American Bar Association has an on-point CLE, here. This topic was also addressed by Sharon Nelson, President of Sensei Enterprises, and Jody Westby, CEO of Global Cyber Risk, at ABA TECHSHOW 2018.

Finally, to end on a more worrisome note, speakers mentioned this site, **Shodan.io**, known as "Google for hackers." It provides information about internet-connected devices, including IP addresses, location details and more. When I briefly investigated the site, I discovered a top voted search on "default passwords" resulting in IP addresses and router configurations, as well as default passwords, location and more.

As emphasized throughout the conference, law firms must think about how to detect threats and respond to them. This will necessitate investment in cyberattack prevention, detection, mitigation and response. At a minimum, firms should have policies and processes in place addressing cybersecurity, training and awareness programs for employees, and disaster response and recovery plans. The time is now — don't wait until it's too late!

Image ©iStockPhoto.com

Recognizing and Addressing Common Security Threats in Your Law Firm

Another day, another data security breach. Data breaches have proliferated with amazing speed. Because of the sensitive data that law firms collect and store, they are a favorite target for hackers and cybercriminals. We will discuss the array of ethical and liability issues that can arise because of a data breach and which might result in attorney discipline and or civil litigation. We will address common technological safeguards and issues such as strong passwords, two-factor authentication, secure browsing, protecting digital client files, understanding email risks, and encrypting data in transit and at rest.

· Reducing the risk of a data breach through training and awareness

· Security controls that should be in place now

· How to use technology to reduce your risk and create a defense

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LAW FIRMS ARE A TARGET FOR HACKERS

LAW FIRMS TARGETED BY HACKERS

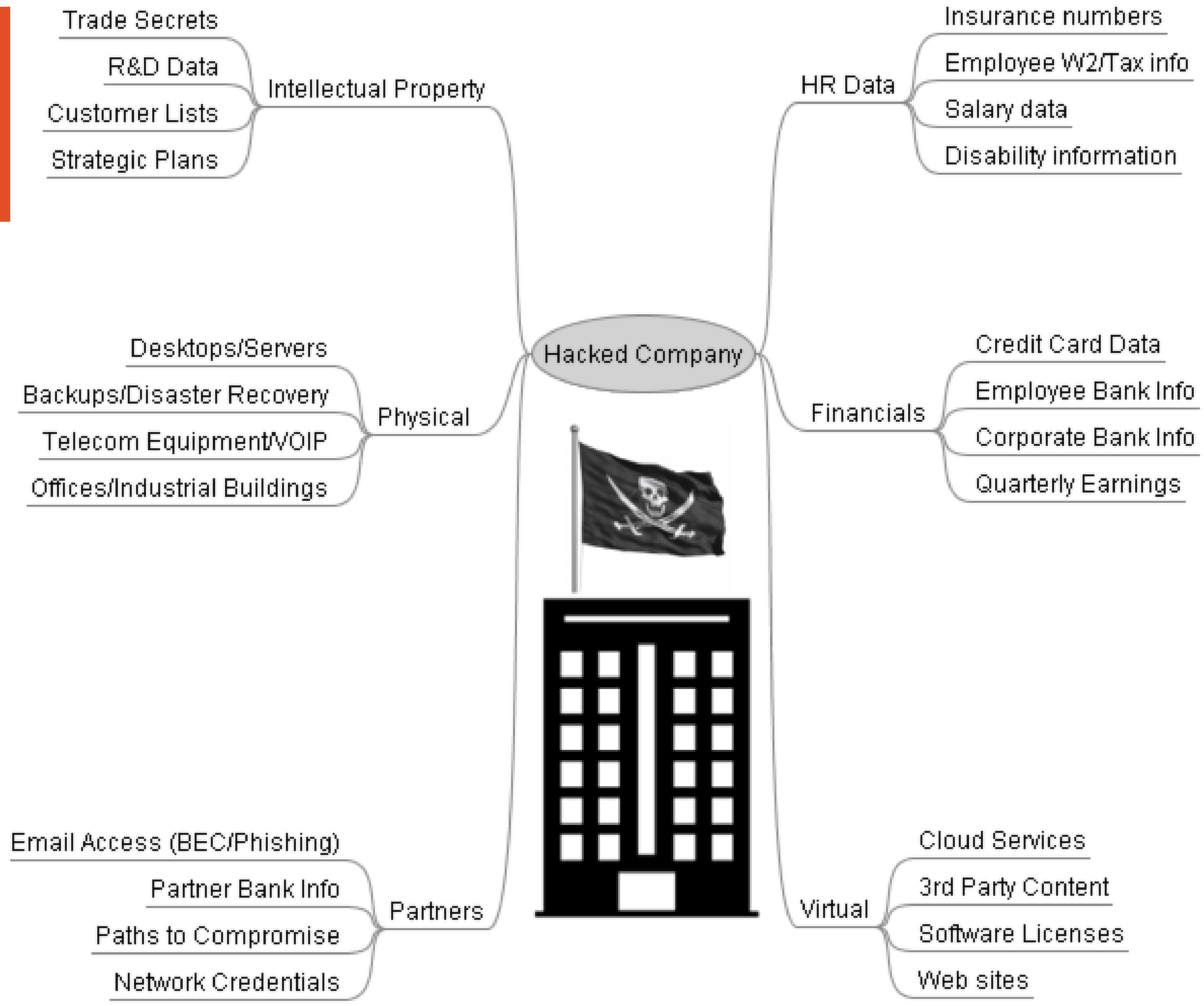
Akin Gump Strauss Hauer & Feld
Allen & Overy
Baker & Hostetler
Baker Botts
Cadwalader Wickersham & Taf
Cleary Gottlieb Steen & Hamilton
Covington & Burling
Cravath Swaine & Moore
Davis Polk & Wardwell
Debevoise & Plimpton
Dechert
DLA Piper
Ellenoff Grossman & Schole
Freshfields Bruckhaus Deringer
Fried Frank Harris Shriver & Jacobson
Gibson Dunn & Crutcher

Goodwin Procter
Hogan Lovells
Hughes Hubbard & Reed
Jenner & Block
Jones Day
Kaye Scholer
Kirkland & Ellis
Kramer Levin Naftalis & Frankel
Latham & Watkins
McDermott Will & Emery
Milbank Tweed Hadley & McCloy
Morgan Lewis & Bockius
Morrison & Foerster
Nixon Peabody
Paul Hastings
Paul Weiss Rifkind Wharton & Garrison

Pillsbury Winthrop Shaw Pittman
Proskauer Rose
Ropes & Gray
Schulte Roth & Zabel
Seward & Kissel
Shearman & Sterling
Sidley Austin
Simpson Thacher & Bartlett
Skadden Arps Slate Meagher & Flom
Sullivan & Cromwell
Vinson & Elkins
Wachtell Lipton Rosen & Katz
Weil Gotshal & Manges
White & Case
Wilkie Farr & Gallagher

List by Flashpoint (via [Crain's Chicago Business])

Key Corporate Assets That May Be Of Interest And Value



https://krebsonsecurity.com/2016/07/the-value-of-a-hacked-company/

What's Valuable At your Law Firms?

- Financial info
  - Online banking credentials
  - Payroll
  - Retirement / pension plan
  - Credit card / bank account numbers
- Personal information
  - Employee SSNs
  - Health / medical info
- Client data
  - Confidential case details
  - Proprietary information
    - Pricing, patents, contracts, plans
  - Email addresses
- **Your computers themselves!!!**

If your data is worth $ to you or your client, it's also worth $ to somebody else.

Your Data is Worth Money

Cloudsweeper

Logout

What is your account worth to attackers?

$28.90

What can I do to be safer?

- Use Cloudsweeper to find passwords already in your email account and redact or encrypt them.
- Change passwords that you've used at insecure sites, and consider using a password manager to assist you in using a different password for different sites.
- Safeguard access to your primary email account as best you can. Consider using two factor authentication - this setting makes it MUCH harder for an attacker to gain access to your account. You can enable two factor authentication on your google account here.

Plain Text Passwords

These accounts send your password to you in plain text. If someone got access to your email account, they would be able to see the password you used for these accounts.

- grammarly.com

Email Password Resets

These accounts allow you to reset your account password with just access to your email account. If someone gained access to your email account, they would be able to access all of these accounts on your behalf.

- Skype*
- Hulu *
- UPlay *
- Groupon
- Newegg

Email Access+

These accounts provide or require additional information to prove your identity beyond access to your email account. If someone gained access to your email account, they would need extra information to access these accounts.

- Twitter $0.30
- Google
- Facebook $5.00

Adriana Linares's Business Email

alinares@lawtechpartners.com Logout

Cloudsweeper

What is your account worth to attackers?

$0.00

Based on information from cybercriminal marketplaces and our searches, access to your gmail account is hypothetically worth $0.00 to an attacker wanting to sell access to your online accounts.

What can I do to be safer?

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- Google

$0.00

Adriana Linares's Personal Email

Cloudsweeper

rayasunn@gmail.com Logout

What is your accou

$23.30

$23.30

aces and our searches, access to your gmail account is hypothetically
to your online accounts.

in your email account and redact or encrypt them.
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- Spotify *
- Hulu *
- Origin *
- Walmart
- Newegg
- Fedex

Email Access+

These accounts provide or require additional information to prove your identity beyond access to your email account. If someone gained access to your email account, they would need extra information to access these accounts (the price of these accounts is not included in the total shown above).

- GoDaddy
- Twitter $0.30
- Google
- Facebook $5.00

- Fedex
- AVG
- Adobe
- Apple $8.00
- Instagram $0.30
- Paypal
- Craigslist
- Wordpress
- LinkedIn
- Live.com
- Amazon $15.00
- Yahoo

PRIVACY AND DATA SECURITY BASICS

#FAIL

St. Pete lawyer throws personal documents in dumpster

Risk Management Misconceptions

- IT (or SOMEONE) is on top of it
- We are too small
- Data stored off-site
- Data stored with a third-party
- Mobile devices are secure because they are password protected

Privacy and Data Security Basics

- What vs How
  - Privacy – WHAT is being collected, classified, stored, used, accessed, shared, retained, disposed
  - Security – HOW is that data being protected
    - Administratively
    - Physically
    - Technically
- Privacy + Security = Data Protection Program

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Privacy and Data Security Basics

- Privacy principles shaped by how personal data is collected, used and disclosed
- Minimization principle
  - Collect only what you need
  - Disclose only what is needed
- Data access (need to know)
- **Process PI if there is a <u>legitimate business need</u>**

WHERE ARE THE THREATS?

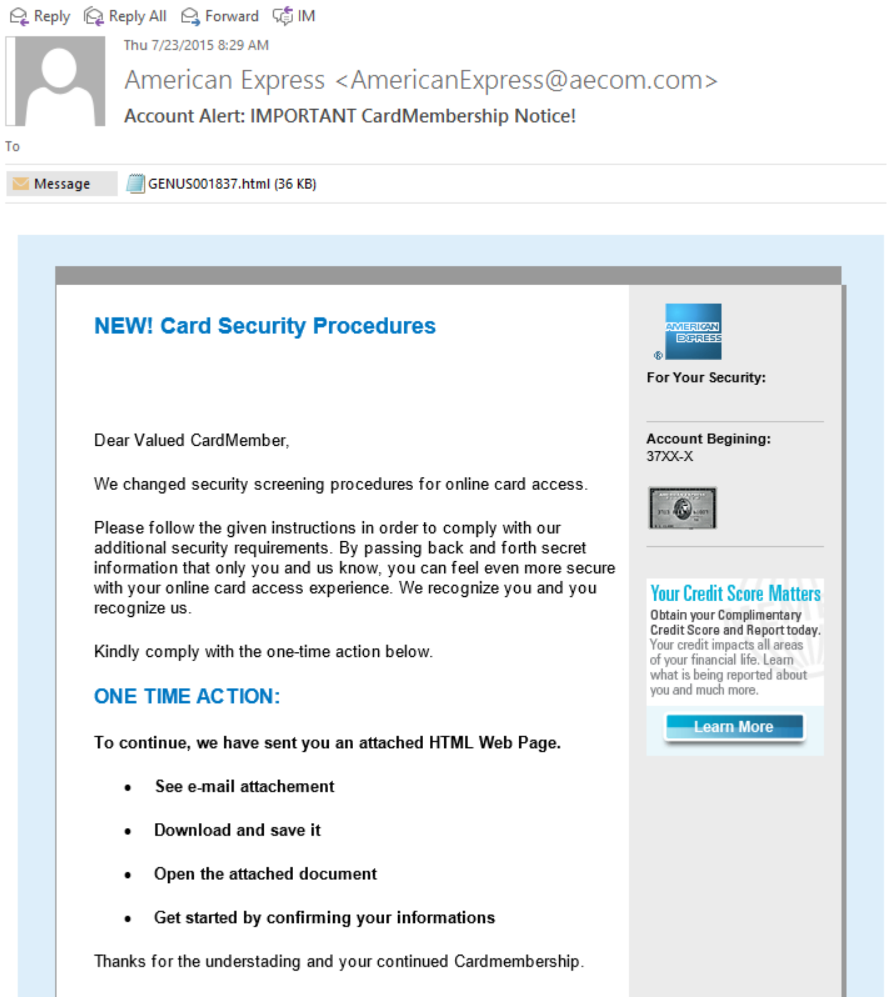
Where are the threats?

- Email
- Social Engineering
- Lost or stolen devices
- Poor passwords
- Disposal of data
- Photocopiers
- Shredding machines
- Flash drives

- 3rd party providers / vendors
  - Cloud storage (Google Drive, DropBox, eDiscovery Systems, etc)
  - Practice Management Cloud-based services
  - E-discovery/ litigation
  - Court Reporters - Audio/Video Tapes, Transcripts

#1 Threat: Email

- Email spoofing/fraud attempt targeting a specific organization or person
- Access confidential data or hold documents for ransom, infect computers
- Education
  - – Understand social media factor
  - – Ongoing awareness campaign



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#2 Threat: Humans

Your Passwords are Weak

- Use 2-factor authentication everywhere
- Have a STRONG password of at least 12 characters or a pass phrase
- Don't use the same password everywhere
- Change your passwords regularly
- Change the defaults
- Require screen saver passwords
- Consider a password manager

THE TOP 25 MOST COMMON PASSWORDS OF 2017

123456	login
Password	abc123
12345678	starwars
qwerty	123123
12345	dragon
123456789	passw0rd
letmein	maste
1234567	hello
football	freedom
iloveyou	whatever
admin	qazwsx
welcome	trustno1
monkey	

WHAT CAN LAWYERS DO TO MITIGATE RISK?

Encryption

- Whole disk encryption
- Biometric access
- Make sure the data is encrypted in transit and while being stored
- Encrypt backup media & thumb drives
- Be sure that only the right parties have access to decryption keys

Email and Apps

- Require password to open Outlook
- Make sure your account settings in Gmail, Twitter, Facebook and other tools are set for the highest privacy and security settings
  - Regularly review these settings
- Do not stay logged into ANY site
- Do not open unknown unexpected attachments from unknown senders (use preview)

Smartphones and Tablets

- Label your device with your name and a phone number where you can be reached to make it easy to return to you if it is lost, even if the battery is dead
- Configure a GOOD passcode to gain access to and use the device
- Set an idle timeout that will automatically lock the phone when not in use
- Keep all software up to date, including the operating system and installed "Apps“

Laptops

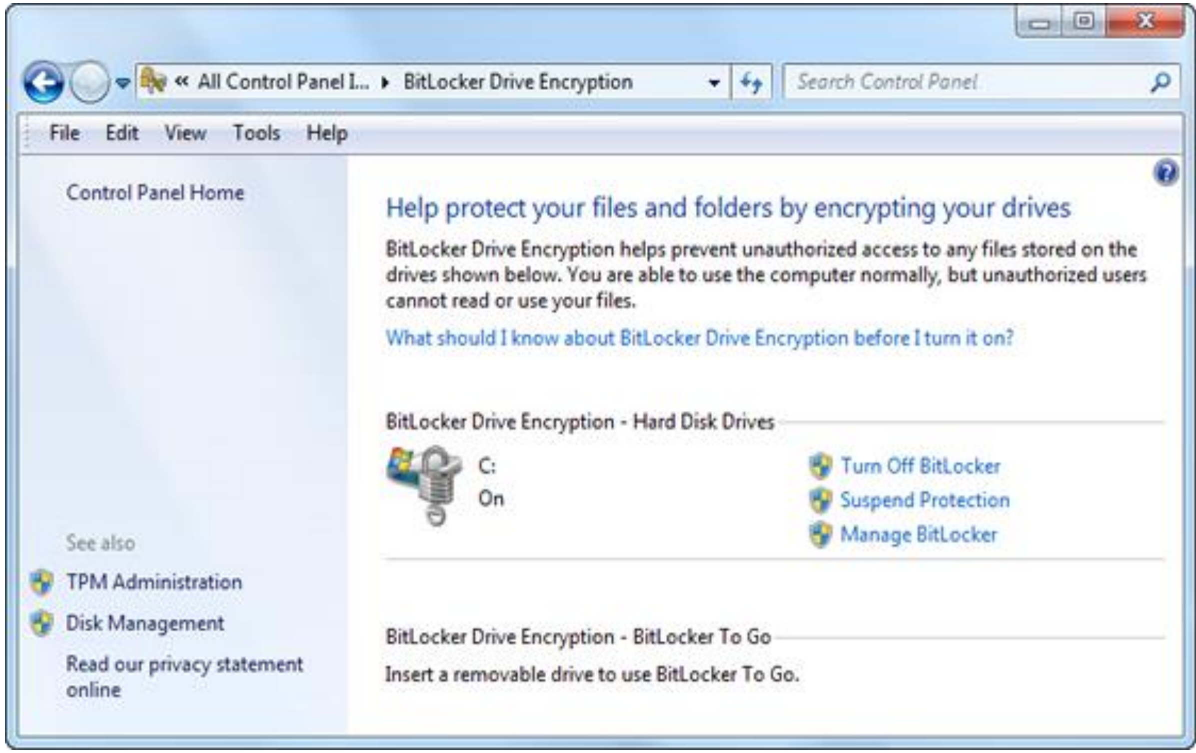
- Use a strong password, biometrics if possible
- Use a firewall, built-in firewalls with Windows and Mac OS X are good!
- Turn off your Bluetooth signal unless you are using it, other devices can pair with your device and steal your data
- Remove bloatware

Encryption

- Whole disk encryption—no exceptions
- USB drives and backup media should be encrypted
- Make sure the data is encrypted in transit and while being stored
- Be sure that employees of the backup or cloud vendor do not have access to decrypt keys

Windows - Bitlocker

- Built-in data protection
- Integrates with the operating system
- Addresses the threats of data theft or exposure from lost, stolen, or inappropriately decommissioned computers
- Provides the most protection when used with a Trusted Platform Module (TPM) version 1.2 or later.
  - TPM is a hardware component installed in many newer computers by the computer manufacturers.
  - May not be available on all machines but can usually be activated



Mac - FileVault

- Built-in data protection
- Integrates with the operating system
- Addresses the threats of data theft or exposure from lost, stolen, or inappropriately decommissioned computers
- Available in OS X Lion or later

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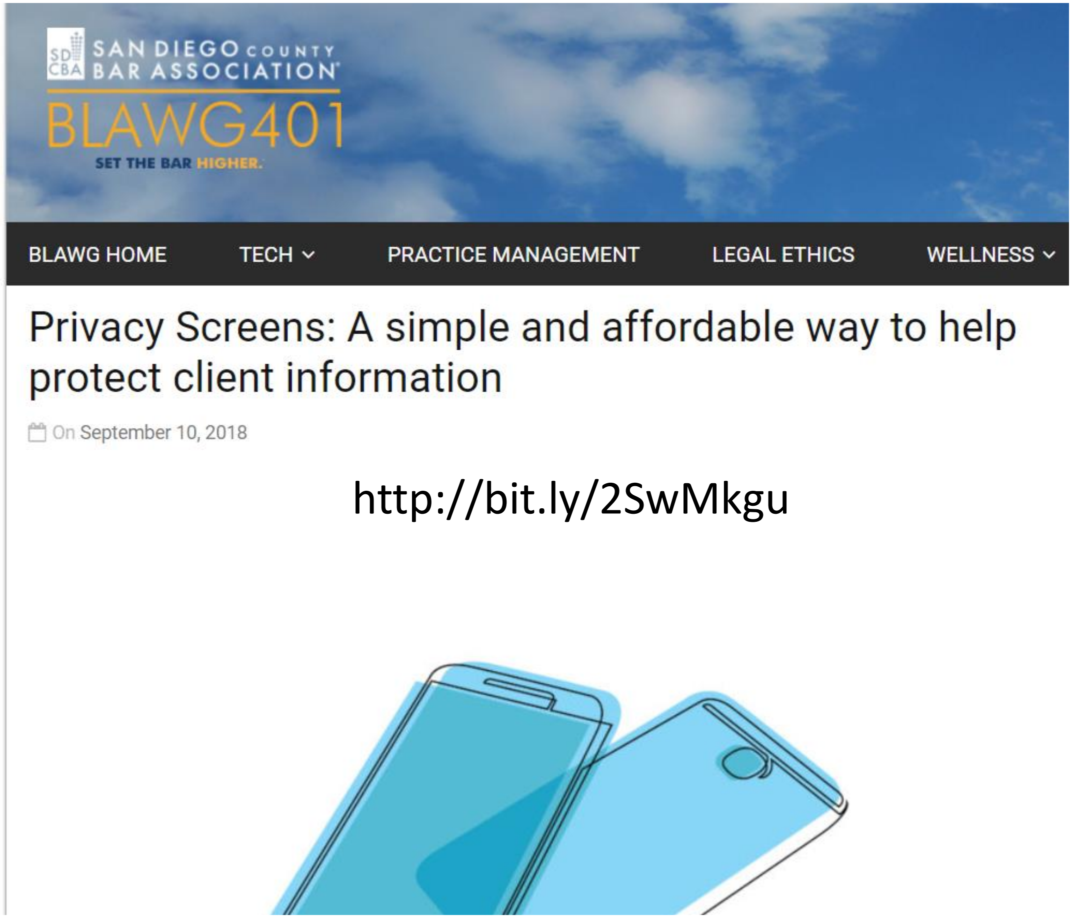
Privacy Screens

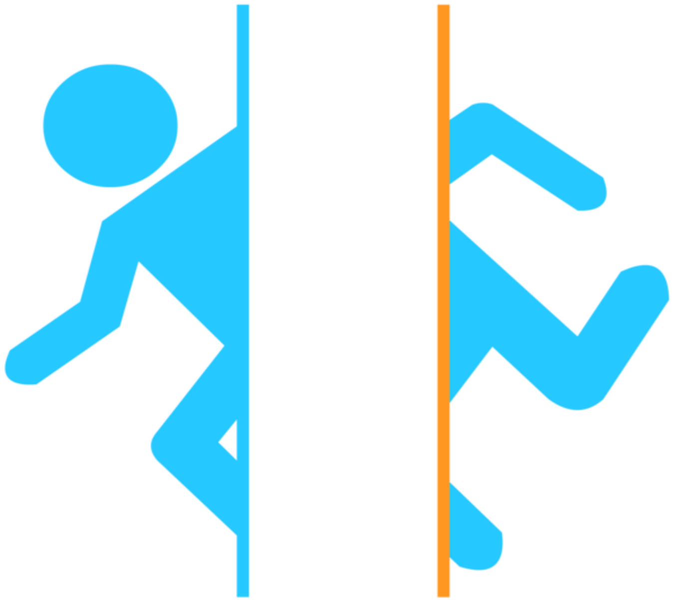
- Prevent "shoulder surfing"
- Invest in a privacy screen for your laptop (even for your phone or iPad)
- Available for cellphones, tablets, laptops and even desktop monitors



http://bit.ly/2SwMkgu

Consider Client Portals

- Clients now expect
  - Access to their documents 24x7
  - Access to WIP before the bill arrives
  - Notification of all key milestones
  - Live feeds of all significant case activity
  - Threaded discussions
- Secure client communications
- All matter files and communications in one place



Wireless

- Wireless networks should be set up with the proper security
  - WEP is weak
  - the only wireless encryption standards that have not been cracked (yet) are WPA with the AES or WPA2
- Use wireless hot spots with great care
  - Do not enter any credit card information or login credentials without seeing *https*

Aircards / Broadband Cards

- Preferred wireless connection because the data is secured from the very beginning!
- Uses cellular connection
- You don’t have to worry about whether you have an https:// session or not
- $40 – 60 / month
- Add-on to cellular service

Miscellaneous Tips

- Employee termination
- Dispose of anything that holds data, including a digital copier, securely
- Scrub metadata, redact docs

Please contact us with questions and your future training needs!

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Adriana Linares is a legal technology consultant with her company, LawTech Partners. Using her practical and personal approach to technology she helps legal professionals use technology to maximize skills and investments through training and consulting. She served as Chair of ABA TECHSHOW 2017; works as a technology consultant to the Florida Bar Board of Governors and is the Member Technology Office of the San Diego County Bar Association. Listen to Adriana as she hosts monthly episodes of the New Solo podcast on the Legal Talk Network.

STRUGGLE FOR WORK-LIFE BALANCE, PART 3

Technology Can Be Your Ticket to a Profitable, Well-Balanced Law Practice (Or Not)

By Dustin Cole

In "Why Lawyers Really Struggle for Work-Life Balance," I listed six steps to building a practice that runs smoothly and allows you to have a life: 1) acquire better management skills; 2) implement better technology; 3) create and install better systems and procedures; 4) develop better teams; 5) build better market focus; and 6) deliver better legal services. In this post, we'll discuss the technology you are using to operate your firm.

A Firm That Is Not Constantly Evolving Is Losing Ground

Choosing and using technology well is essential to an efficient, growing practice with satisfied clients, a happy team — and less stress. If you haven't reviewed your firm's needs against your current technology, especially operations software, in more than two years, I can almost guarantee your practice's needs have changed and that your operations — and profits — are suffering.

The Technology "Duh" Factors

Technology can be your ticket to a successful, profitable practice — or it can be a debilitating nightmare.

Let's start at ground level with what I call the "duh" factors.

- Duh Factor 1: You don't regularly back up your data.
- Duh Factor 2: You back up but don't check that it was successful.
- Duh Factor 3: You have multiple computers running various versions of Windows and Office.
- Duh Factor 4: You have multiple versions of documents on multiple computers (no document-drafting protocol) and have sent out the wrong version more than once.
- Duh Factor 5: You allow everyone to save stuff to their own local drive.
- Duh Factor 6: Everyone has their own Outlook or other calendar, which isn't fully shared.

To evolve your technology, "duh" is a good place to start. Next is evaluating the software you need to run your practice.

Basic Software Categories

Essentially, there are six basic types of software for operating your law practice:

1. Office function software. This includes Microsoft Office, the Mac Office suite and several other compatible products. And yes, there are alternatives, including the Google suite.

2. Practice management (case management) software. This category includes Clio, MyCase, Zola Suite, Firm Central, Needles, TrialWorks and about 50 others. Some are better for small firms, others are for the big kids.

3. Document assembly software. Many document assembly products are for specific practice areas, such as real estate, estate planning and family law, and some are general, such as HotDocs and ActiveDocs. Many practice management software providers say their programs include document assembly, but beware: This may mean simple merge forms and far more limited capabilities than true document assembly programs.

4. Time and billing software. This category includes Tabs3, PCLaw and Timeslips. However, the days of free-standing T&B programs are waning as many more practice management programs include time and billing functions.

5. Research software. This encompasses Westlaw, LexisNexis, FastCase, Casetext, CaseMaker and more. Even Google has a decent (free) research tool, Google Scholar.

6. Accounting software. QuickBooks and FreshBooks fall into this category, of course. The problem is that most accounting packages are not made specifically for legal needs. Many of the newer practice management programs offer built-in accounting software, but make sure it is fully functioning accounting software and not merely time and billing. A widely used old standby is Tabs3. One of the best of the new practice management programs, Zola Suite, has a full accounting package, with an optional integration with QuickBooks.

The Technology Everyone Needs

We sometimes forget what underlies everything we do on a computer. The operating system. One of the primary advantages of updating to the latest operating system isn't the new bells and whistles. It's the upgraded security.

Whether Windows or Mac, you need to have the best basic security protection you can get. And you don't have it if you're using an older operating system. If you are using an older operating system — Windows XP or Windows 7 (saints preserve ye if you're still using Vista) or version 10.4 or lower on a Mac — you are setting yourself up for being hacked, or a systems crash.

So what other software do you need? Depends.

Why You *Don't* Need That Sparkly, Shiny Software

Let's get real. If you have a practice with less than, say, 25 open files and most are transactional or short-term such as criminal or DUI matters, you don't need much in the way of practice management tools. At this stage, let's say a good digital filing system, calendar, task management system and email manager. You have those last three in Outlook — at least in the latest version.

So for you, the path to greater productivity is to study up on the software you have. Learn how to use it to its capacity. Read tech blogs (here's a good post on using Outlook more effectively from the Alphr technology blog), watch videos like these from Legal Office Guru and get hands-on training.

Why You *Do* Need That Sparkly, Shiny Software

If you're still at the above stage and plan to grow, the time to put the procedures in place to help you grow safely and profitably is *now*, while you still have a smaller number of files, and a smaller staff. Too many lawyers struggle to stay afloat with 100, 200 or more files without changing how they operated with 25 to 30 matters. The results are predictable: missed deadlines, errors, unhappy clients, grievances and malpractice suits — and an attorney who has a heart attack at 40, a divorce at 45, and a drinking problem at 46.

And if you are already growing and struggling to keep up, it's time to take the leap. The practice that is not evolving is dying. And sometimes the attorney is too.

If your practice involves complex matters and multiple parties, and you have many other people working on the same matters, you'd better have good case management software. And you'd better be fully digital. Otherwise, you are severely limited in your capacity and efficiency and you will, in time, make a mistake, miss a deadline or lose important documents or information.

Why You're Probably Wasting Time and Money Right Now

When I walk into a firm for an operations review, my rule of thumb is that whatever software they have — practice management, research, document assembly, even word processing — they're probably using about 25 to 30 percent of its capabilities. And rarely has this been far from the truth.

Why? Because of any or all of the following:

- They bought the wrong software from a good salesperson.
- They didn't pay for the maximum training for every user.
- They don't train new employees — they let existing staff train them informally.
- They didn't buy the maintenance and support packages.

- They haven't created a detailed user manual or procedures protocol.
- They don't have an in-house problem-solver guru who knows the software intimately.
- They don't exercise quality control to make sure everyone is using the software in the correct, standardized way.

One of my favorite trial practice software programs, Needles, simply won't sell its software without a training and support package because they know from experience the client won't have the best experience with their software and will blame them.

It reminds me of one of my favorite admonitions regarding new client intake: If you don't explain upfront how the process will work, who they will talk to, about how long it will take, and about how much it will cost, clients will make it up for themselves, and you'll get to be wrong.

How to Choose and Use the Best Software

See "Why You're Probably Wasting Time and Money" above. Do the opposite.

What Type of Practice Management Software Do You Really Need?

The first need is usually to track time and get the bills out with the least pain. It's one reason for the wild popularity of Clio and MyCase. They make billing easy. If you have either program, though, take time to learn their many other capabilities. The most valuable, in my opinion, are the calendaring, task management and merge forms/template forms capabilities. Clio has an advantage in that it interfaces directly with Office 365 (a recent upgrade). MyCase has template forms capabilities but uses its own word processor, which may create issues in document management.

Don't make the mistake of buying software that isn't designed for your type of practice. If you have an estate planning practice, you probably don't need general case management, and your calendaring can be handled neatly with Outlook. What you may need instead is good estate planning and document management software.

These are my basic requirements for case management software capabilities:

- Time tracking and billing
- Robust calendaring, including automated scheduling of SOL's and critical deadlines
- Robust task management capabilities
- User-friendly case and matter management screen
- Full integration with Office 365
- Easy-to-use template merge forms capabilities

- Fully integrated email functions (i.e., doesn't rely on an Outlook "hook)
- Secure client communications portal
- Full accounting capabilities or full integration with QuickBooks
- Sophisticated document management and versioning
- Customer relations management (CRM) capabilities
- Full-feature mobile phone integration
- Credit card payment processing
- High-level data security

Frankly, few programs have ever met *all* of these requirements, which is why I have never endorsed any practice management software.

The Bottom Line

Good use of technology should be your first point of leverage to create greater efficiency and manage your clients, your matters and your team more effectively. As I said earlier, if you are not constantly evolving you cannot grow. Bear this information in mind as you review your current software or look to your next evolution.

Catch Up with the Series

In "Why Lawyers Really Struggle with Work-Life Balance," we talked about how successful lawyers learn new ways to operate their firms so they can keep building their practices while having (or recovering) a life. Here are six steps toward building a more successful practice and life.

1. Acquire better management skills.
2. Implement better technology.
3. Create and install better systems and procedures.
4. Develop better teams — lawyers, paraprofessionals, support, contract staff — and delegate more work.
5. Build a better market focus.
6. Deliver better legal services.

Illustration ©iStockPhoto.com

Mindfulness is Nice, But How About Some Techfulness?

Let's Embrace Technology to Reduce Stress, Not Create It

With laptops, smartphones, and persistent internet, lawyers are only a call, text, or email away from business and client demands, long after "normal" business hours have ended. More often than not, technology takes the blame for added anxiety in our lives. But we can certainly turn the tables on it and use technology to our advantage. Simple and affordable tools, services, and apps can be used to help busy lawyers reduce stress, boost mental and emotional health and help to deliver superlative client service.


THE DAILYSHOW
WITH TREVOR NOAH
0:00 / 5:09

The Case for Case Management

- All-in-one matter management
  - Opening, linking, closing matters
- Sync with Contacts and Calendars
  - Dates and deadlines reminders
- Supervise others
- Dashboards and reporting
- Conflicts of interest
- Automated time and billing

Dealing with Documents

- Document management systems
  - Dropbox vs Netdocuments
- Document Automation
- Document creation
  - Forms/templates
    - Consistency in look and feel
    - Word Styles
  - Autotext, autocorrect
  - Text expansion tools
- Signing docs

Timekeeping & Billing

- Assisted timekeeping
  - Case management
  - Chrometa
  - Tali
  - Phone calls
- Text expansion
- Invoicing & Collections
  - Customizing rates and invoices

Communications

- Cell phones and clients
- Texting and clients
- Video conference
- Headphones
- Phone services
  - Remote receptionists
  - Cell phone services: OneTalk
  - Google Voice, Skype
- iOS Handoff
- Snail mail

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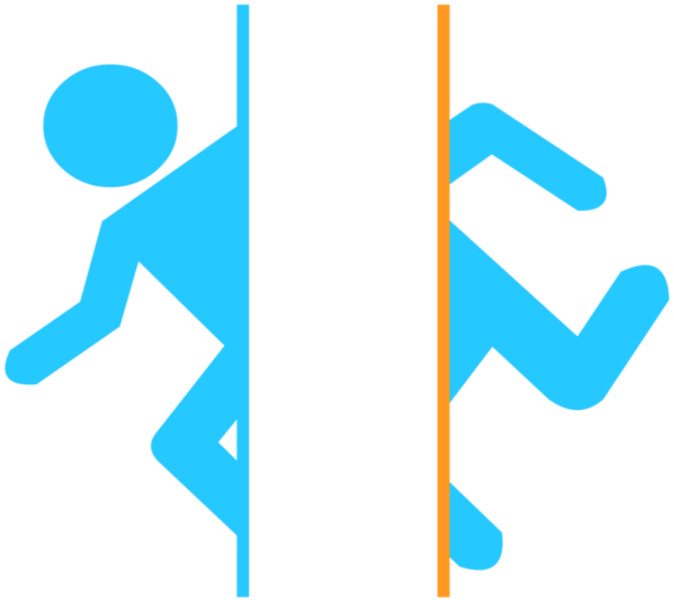
Consider Client Portals

- Clients now expect
  - Access to their documents 24x7
  - Access to WIP before the bill arrives
  - Notification of all key milestones
  - Live feeds of all significant case activity
  - Threaded discussions
- Secure client communications
- All matter files and communications in one place



Aircards / Broadband Cards

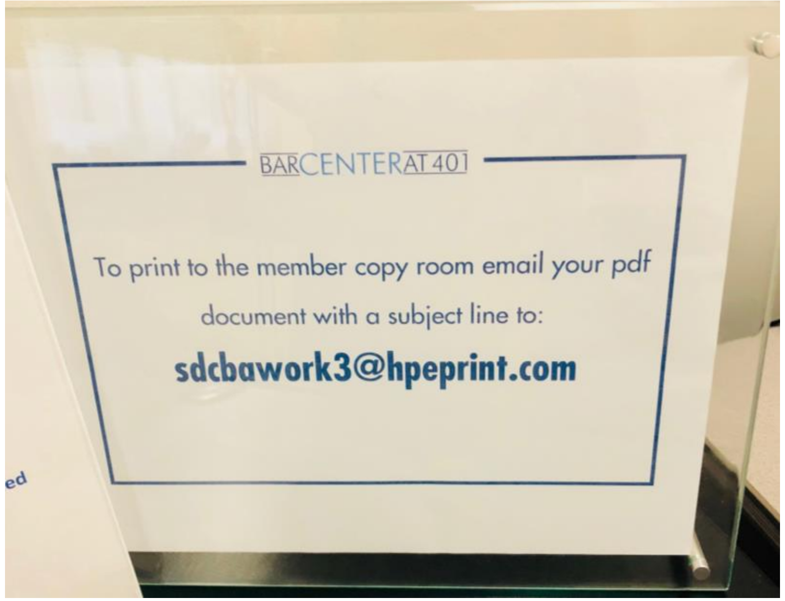
- Preferred wireless connection because the data is secured from the very beginning!
- Uses cellular connection
- You don't have to worry about whether you have an https:// session or not
- $40 – 60 / month
- Add-on to cellular service

Wireless

- Wireless networks should be set up with the proper security
  - WEP is weak
  - the only wireless encryption standards that have not been cracked (yet) are WPA with the AES or WPA2
- Use wireless hot spots with great care
  - Do not enter any credit card information or login credentials without seeing *https*

Scanning & Printing

- Portable scanners
- Portable printers
- Scanning apps
- Mailing docs
- UPS, FedEx, Office Depot



Thank You!
Questions?

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Henry has been practicing law for 17 years and focuses on commercial real estate, leasing, landlord-tenant, construction, finance, real estate joint ventures and business transactions; landlord-tenant, lease, contract and construction litigation. A former partner in a premier boutique real estate firm, Henry launched his solo practice in 2015 and with licenses in California, New York and Florida he successfully serves his client from planes, trains and automobiles.

Adriana Linares is a legal technology consultant with her company, LawTech Partners. Using her practical and personal approach to technology she helps legal professionals use technology to maximize skills and investments through training and consulting. She served as Chair of ABA TECHSHOW 2017; works as a technology consultant to the Florida Bar Board of Governors and is the Member Technology Office of the San Diego County Bar. Listen to Adriana as she hosts monthly episodes of the New Solo podcast on the Legal Talk Network.

Microsoft Word: Settings for Legal Professionals

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Microsoft Word: Settings for Legal Professionals

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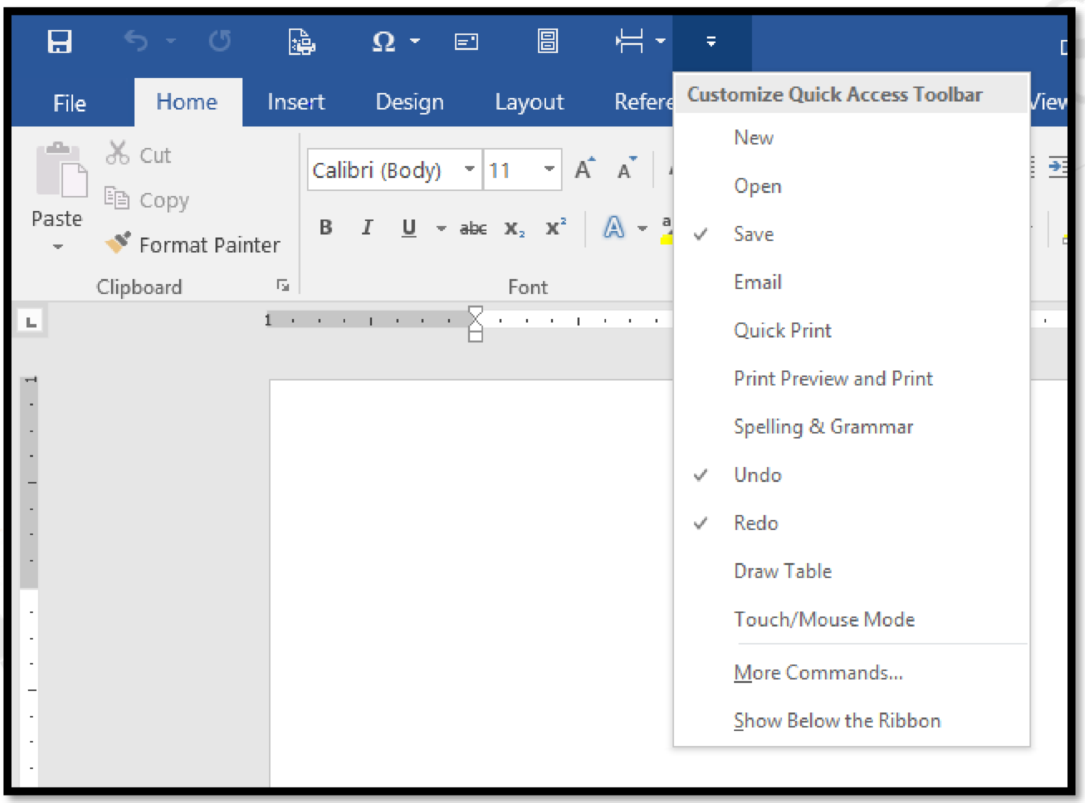
CUSTOMIZING THE QUICK ACCESS TOOLBAR

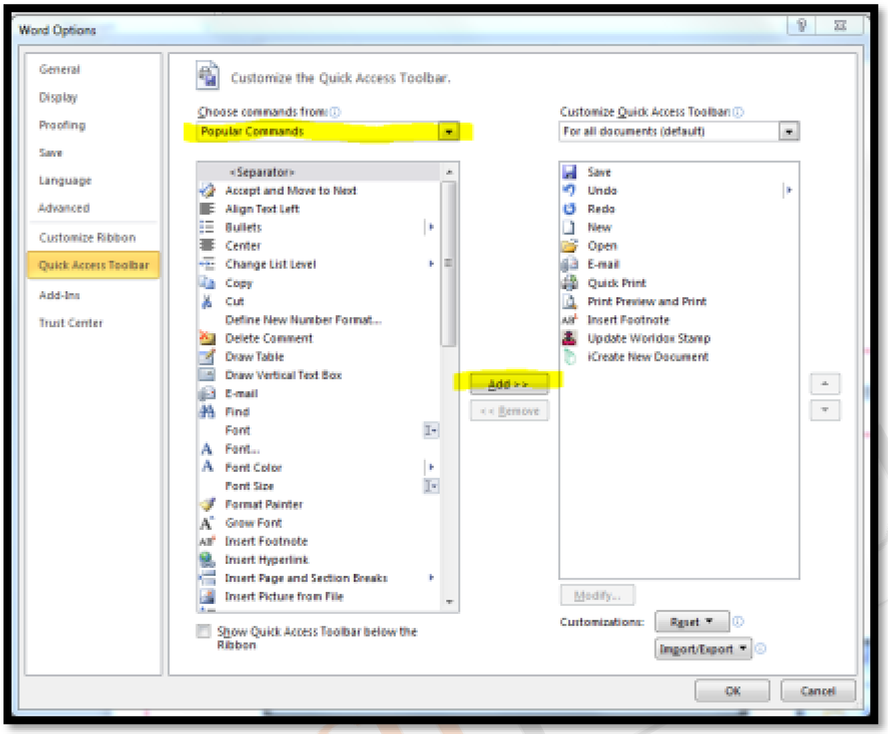
Customize the QAT (Quick Access Toolbar) with your most accessed/needed shortcuts (New, Open, Save, Close, Spellcheck, Show/Hide Formatting marks, etc).

- Click on the arrow to the right of the QAT to add useful shortcuts such as "New" and "Open"

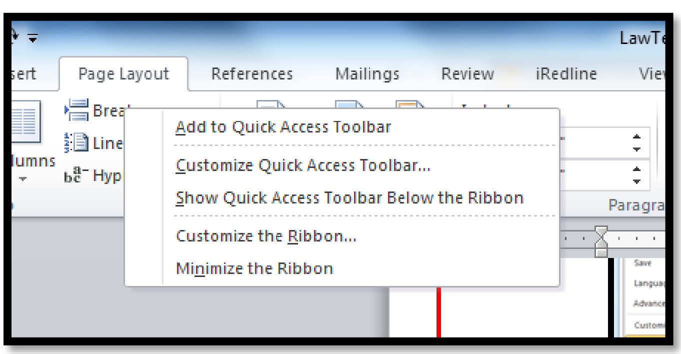


- The QAT will quickly run out of screen real estate in its default location. You may opt to choose "Show Below the Ribbon" from the dropdown menu to move the QAT below the Ribbon.

- On the “Customize Quick Access Toolbar” drop down you will see an option for “More Commands”. Clicking it will display a comprehensive list of the hundreds of commands available in Word.



- You may want to add the “Shrink one Page” button to your QAT. In the dialog box shown above, change the option that says “***Popular Commands***” to “***All Commands***” > scroll down to “***Shrink One Page***”, select it and click the “***Add***” button. Now, the ‘Shrink One Page’ button is always available on your QAT.
  - Look for and add the “Email as PDF” button – very handy!
- To quickly add a button from any Ribbon simply ***Right-Click*** on any button/command on the toolbar and select ***Add to Quick Access Toolbar***



TURN ON RULERS FOR SHOWING PAGE AND PARAGRAPH MARGINS.

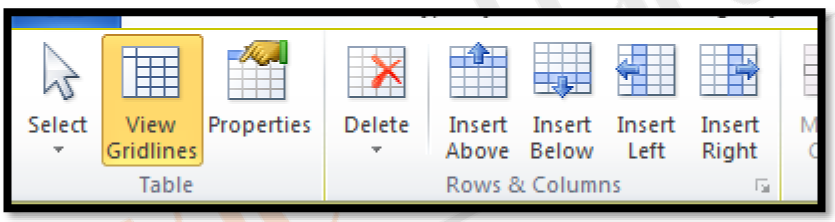
- Go to the VIEW Tab, place a check in the “Ruler” box of the Show/Hide section

TURN ON GRIDLINES IN TABLES

Gridlines are set to OFF by default in Word 2010 making it hard to spot a table in a document. You’ll want to turn them on once.

1. In a brand new blank document go to Insert > Table and insert any table of any size (it’s temporary so just add any number of rows and columns).
2. The Tables Ribbon will appear
3. Click on the Layout subtab to show the Layout Ribbon for Tables

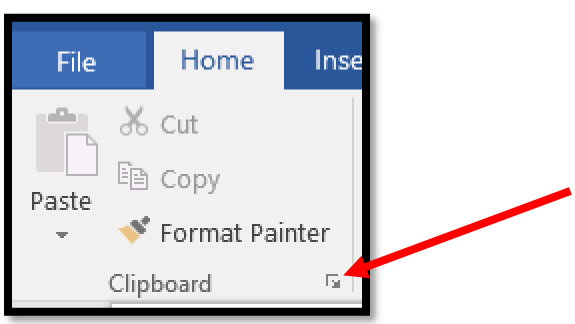
4. Simply click “View Gridlines” to activate them. It might not look like anything happened but you have set the gridlines “on”



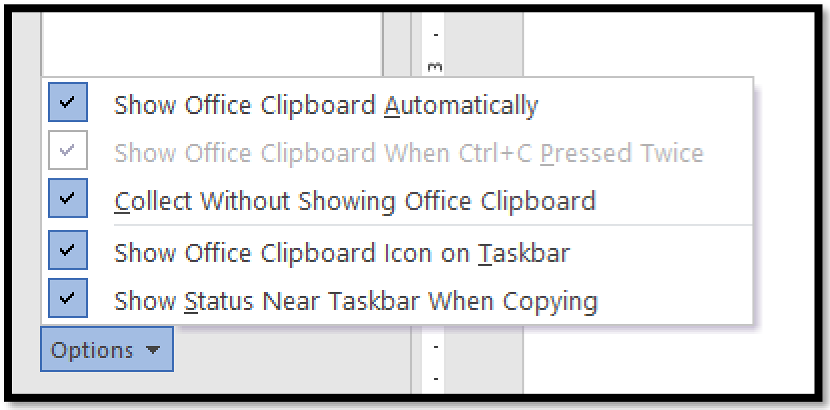
TURN ON CLIPBOARD AND SET ALL OPTIONS ON (CHECK THEM ALL)

The Microsoft Office Clipboard allows you to copy and collect up to 24 items from Office documents or other programs and paste them into another Office document. It needs to be turned “on” for maximum functionality and efficiency. You need only do this once.

1. On the **Home** tab, in the **Clipboard** group, click the **Clipboard** Dialog Box Launcher.

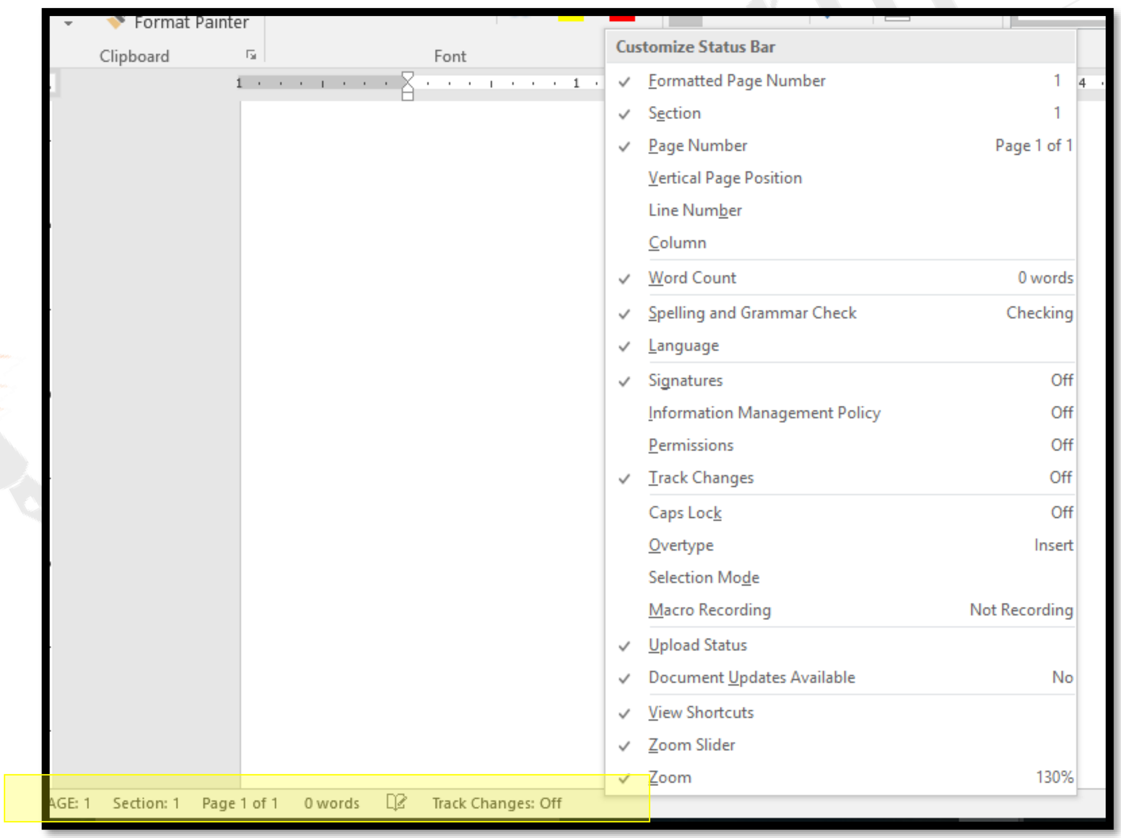


2. In the Clipboard task pane, click Options as shown below, click all unchecked options (check everything). The Clipboard is now active and available in the other Microsoft Office programs (Excel, Outlook and PowerPoint)



Display More Status Items On The Status Bar

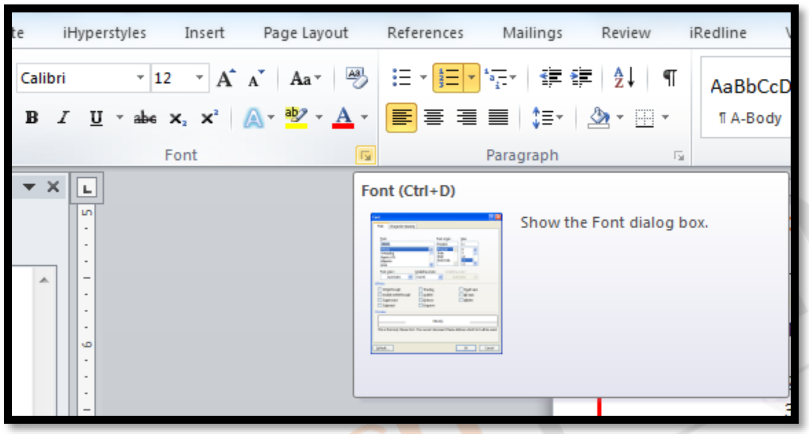
- Right click on the Status Bar and be sure the first 3 options are checked. (Formatted Page Number, Section, Page Number)



Change the Default Font and Line Spacing for All New Documents

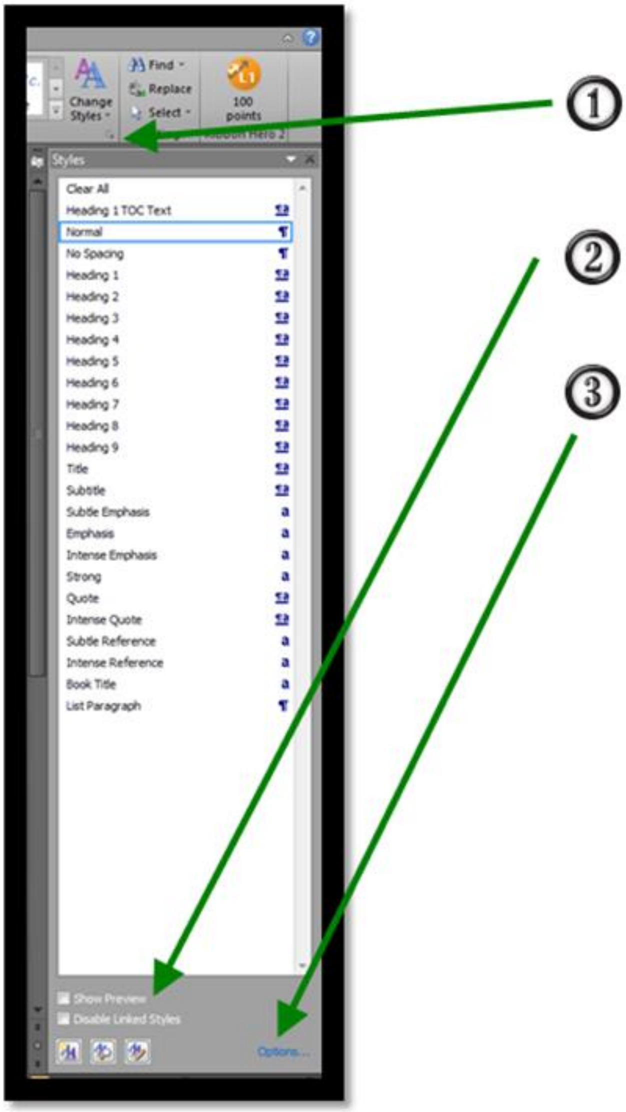
Your IT Department may have already set this in your firm templates and you may not be able to change these settings.

1. If you do not have a document open, create a *new* document that is based on the Normal template. To do this press CTRL + N or File > New
2. In the **Font** group, click the **Font** flyout button in the bottom right hand corner.



3. Select the options that you want to apply to the default font, such as font style and font size. If you selected specific text, the properties of the selected text are set in the dialog box.
4. Click the **Set As Default** button in the left hand corner of the dialog box**.**
5. Select the **All documents based on the Normal.dotm template** option, and then click **OK**.
6. Do the same for Paragraph customizations by following the same steps except in the Paragraph dialog box.

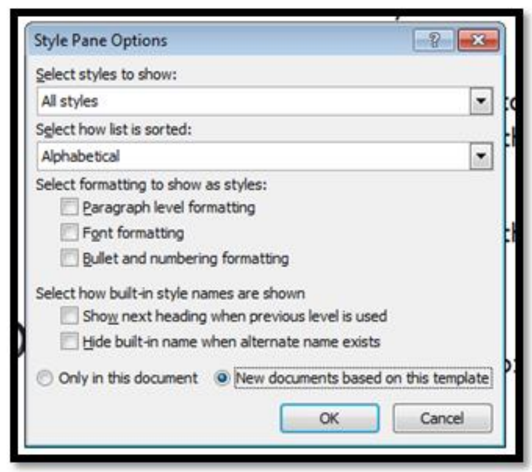
Customize the Styles Pane To Be More Useful



1. Click the Flyout button in the Styles group to show the Styles Task Pane

2. Put a check in the "Style Preview"

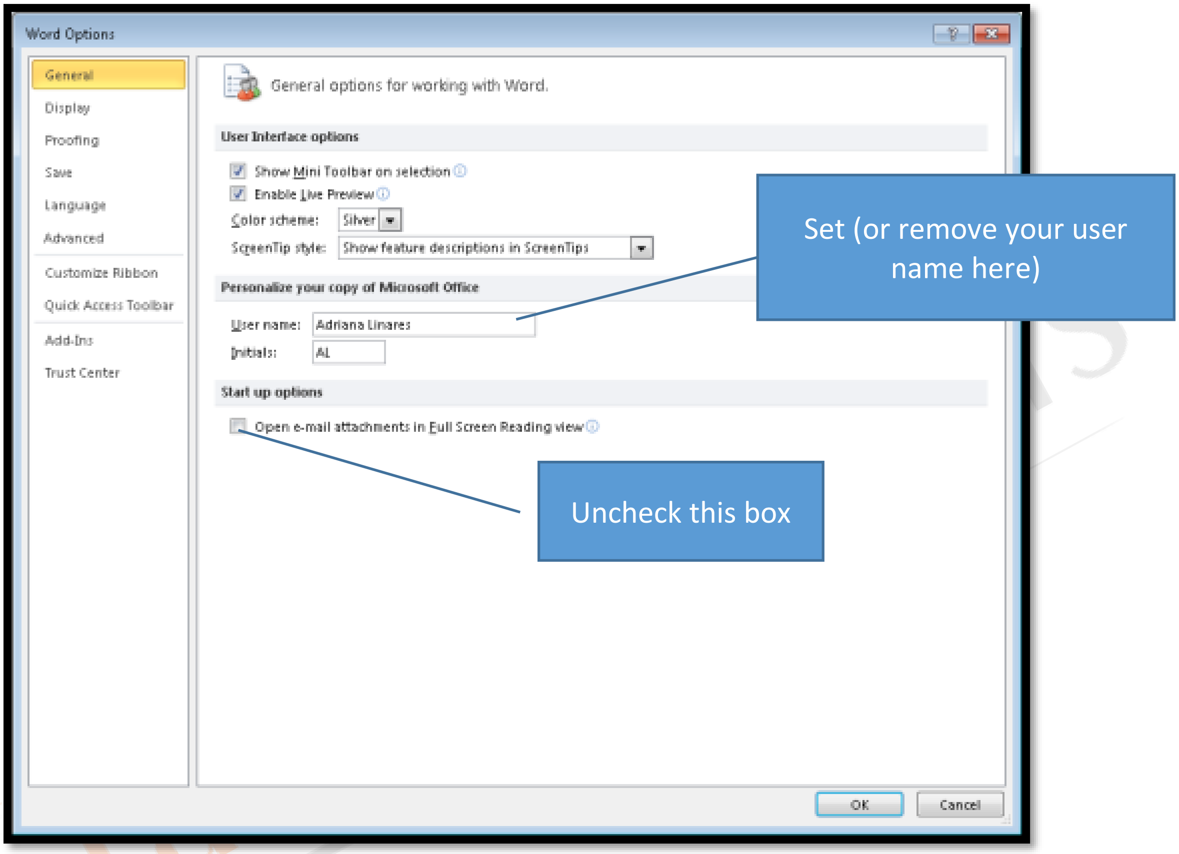
3. Click on Options to show Style Pane options dialog box and change settings to match those shown below…



Configure Advanced Settings

For the following section – you will go to File> Options in Word.

Under "General" options…



Under "Display" options

Check "Update fields before printing".

Check this box to make sure that all tables of contents and cross-references are updated prior to printing the document. NOTE: This will automatically update a DATE (ex July 24, 2012) field if the date is not hard coded in. To turn a date FIELD into a hard coded date that will not change highlight the date and press CTRL+Shift+F9

- File > Options> Display > Printing Options > Check the box next to "Update Fields Before Printing"

Under "Proofing" options

Turn off the "Ignore Words in All Caps" setting in spellcheck.

- File > Word Options > Proofing section.

Set Autocorrect Options

Also, while here, go to the AutoCorrections dialog box and delete the quick correct that turns this (c) into this © same for ® symbol.

Uncheck "Mark grammar errors as you type". This will eliminate the green squiggly lines in legal documents with a lot of legal language.

OPTIONAL - Uncheck/Check "Check grammar with spelling". Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

Under "Save" options

Change "Save AutoRecover information every" option to 2-5 mins.

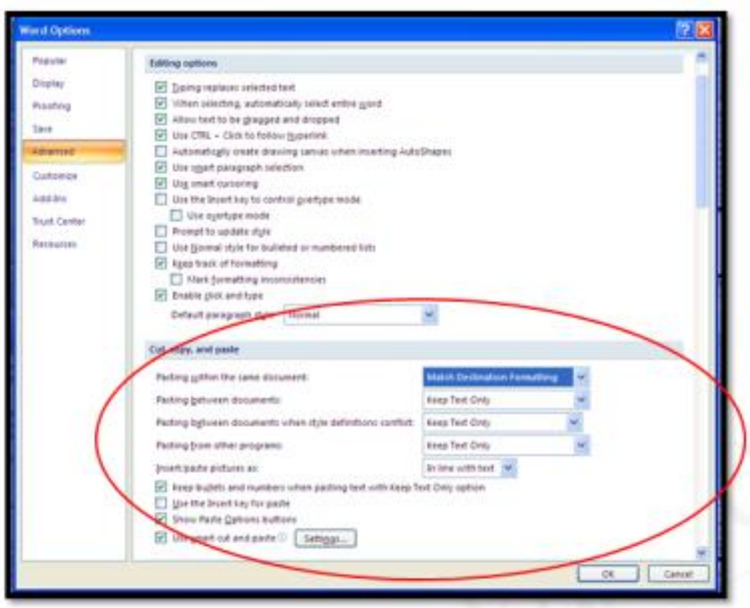
Under "Advanced" options

Editing options **(the first section of this window)**

- Uncheck "When selecting, automatically select entire word"
- Uncheck "Automatically create drawing canvas when inserting AutoShapes".
- Uncheck "Use smart paragraph selection.

Set your default paste to TEXT ONLY.

Under the ***Cut, copy, paste section*** set options as show here.



Always showing shading for field codes will help you see fields like page numbers and other field codes easily.

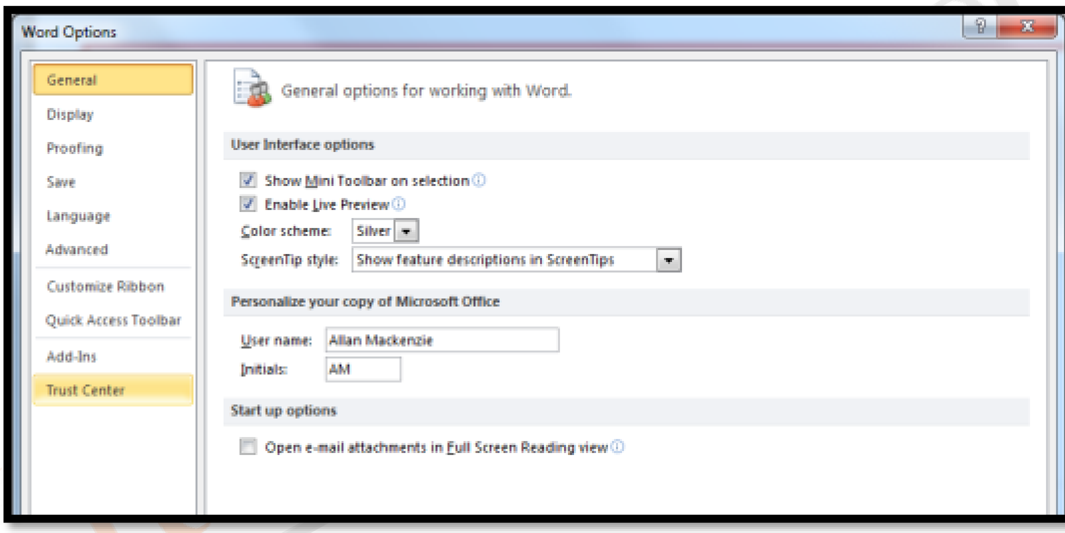
Show Document Content section> Chose ALWAYS as the setting for “Field Shading”.

Good tip for legal assistants – turn on the Style Pane while in DRAFT mode (remember you only see it when in DRAFT mode).

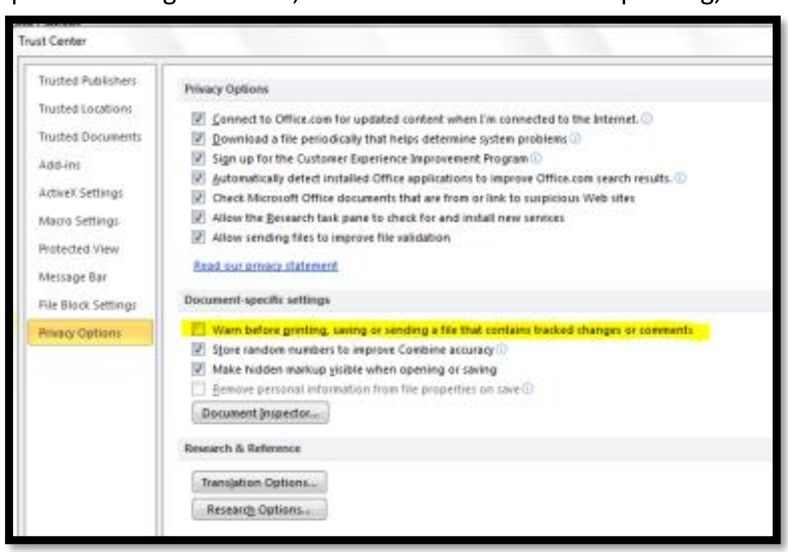
File > Word Options > Advanced > ***Display*** section > set “Style area pane in Draft and Outline views” to a value of 1

Get Warnings About Documents with Track Changes

- File > Options > From the Word Options dialog, choose Trust Center > Trust Center Settings > Privacy Options.



- In the "Document-specific settings" section, tick the box "Warn before printing, saving or sending a file that contains tracked changes or comments".
- You may also want to check “Make hidden markup visible…” and “Remove personal information from file…”



The End.

Keyboard Shortcuts: Word

CTRL + A Select all
CTRL + B Bold
CTRL + C Copy
CTRL + V Paste
CTRL + D Displays the font dialogue box
CTRL + E Center alignment
CTRL + F Displays the find dialog box, to search the current document
CTRL + G Displays the go to dialog box, to go to a specific location in the current document
CTRL + H Displays the replace dialogue box
CTRL + I Italic
CTRL + J Full justification
CTRL + K Create hyperlink
CTRL + L Left alignment
CTRL + N Creates a new document
CTRL + O Displays the open file dialogue box
CTRL + P Print
CTRL + R Right alignment
CTRL + S Displays the save dialog box
CTRL + U Underline
CTRL + V Paste
CTRL + X Cuts
CTRL + Y Redo the last undone action
CTRL + Z Undoes the last action
CTRL + ENTER Insert page break
CTRL + F2 Show print preview
CTRL + F4 Closes the active document window
CTRL + F6 Opens the next document window
SHIFT + F3 Change case

CTRL +], CRTL + [Grow or shrink font one point
CTRL + SHIFT + END End of document
CTRL + END End of document
END End of line
SHIFT + END End of row
ALT + END End of row
ALT + SHIFT + END End of window
ALT + CTRL +1, 2, 3 Apply heading1,2,3
CTRL + SHIFT + A All caps

NAVIGATING A TABLE

TAB Move to next cell in a row
SHIFT +TAB Move to previous cell in a row
ALT + HOME Move to first cell in a row
ALT + END Move to last cell in a row
ALT + PAGE UP Move to first cell in a column
ALT + PAGE DOWN Move to last cell in a column
UP ARROW Move to previous row
DOWN ARROW Move to next row

Word 2011 (Mac): Settings for Legal Professionals

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Word 2011 (Mac): Settings for Legal Professionals

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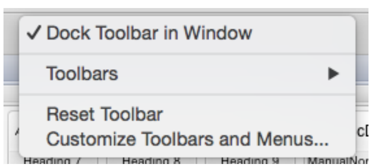
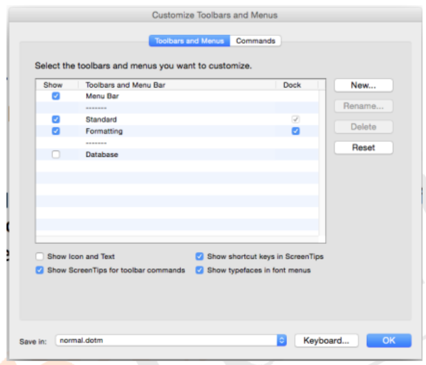
Word 2011: Settings for Legal Professionals

CUSTOMIZING THE STANDARD TOOLBARS

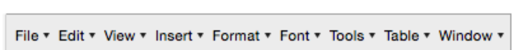
To customize or Add/Remove Standard toolbars, ***Ctrl + Click*** any area of a toolbar and choose ***Customize Toolbars and Menus***.





- While this dialog box is Open, the toolbars are in an "edit state." Click and drag any button you wish to remove from a toolbar. Once it leaves the toolbar area, release the mouse and the button will be removed from the menu.

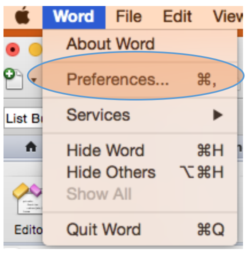
- While the dialog is open, a separate menu system (below) appears. Choose any function by clicking a menu item and then drag one of the buttons to the toolbar to the position desired. Release the mouse and the button will appear on the toolbar.

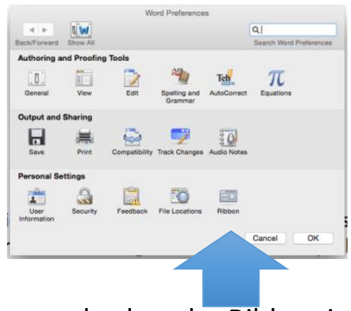


- When your adjustments have been made, click ***OK*** on Customize Menus And Toolbars Dialog, and the changes will be locked.

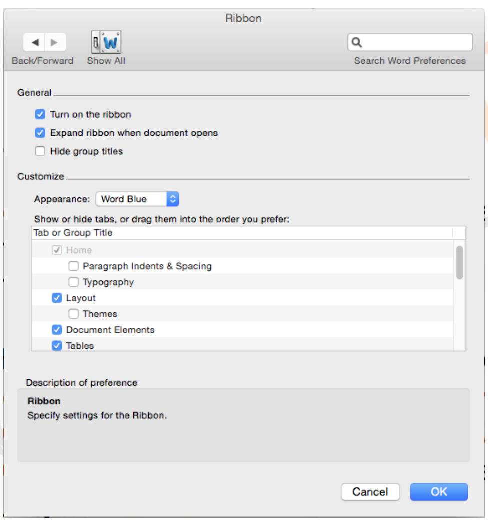
CUSTOMIZING THE RIBBONS

The standard ribbons (Home, Layout, Document Elements, Tables, Charts, Smart Art, Review and the usually hidden “Developer”) may have their display options modified. Chose the “***Word Menu***”, “***Preferences***”, click “***Ribbon***.”





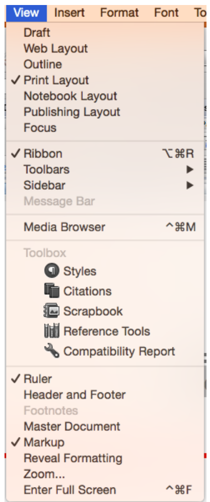
On the Ribbon dialog, choose whether the Ribbon is “On” or “Off” by default, or instead Expands when the document opens and contracts later. Color options and actually choosing to display or hide individual ribbons are also available.



Click ***OK*** when changes are complete.

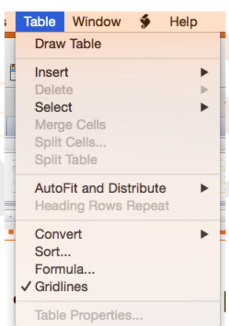
Turn on Rulers for showing page and paragraph margins.

- Go to the ***VIEW Menu***, and check the ***Ruler*** in the lower portion of the menu.



Turn on Gridlines in Tables

Gridlines are set to OFF by default in Word 2011 making it hard to spot a table in a document. You'll want to turn them on once. Go to the ***Table Menu*** and click ***Gridlines***

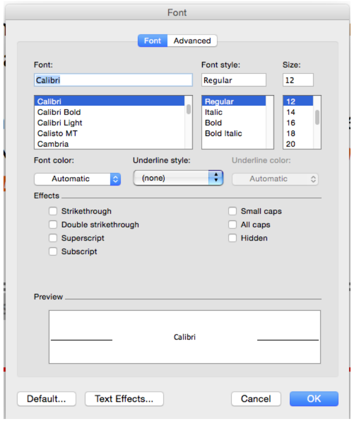


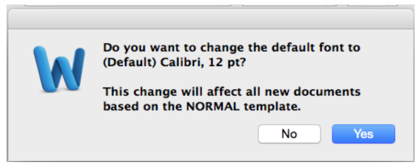
Change the Default Font and Line Spacing for All New Documents

Your IT Department may have already set this in your firm templates and you may not be able to change these settings.

1. If you do not have a document open, create a *new* document that is based on the Normal template. ***File > New Blank Document***
2. On the ***Format Menu*** choose ***Font***. Make the changes you wish to the Font choices to be used as a default going forward, then click the ***Default*** button in the lower left of the dialog. A second dialog will appear asking if

you wish to change the font for all new documents based on the NORMAL (blank document) Template. Click ***Yes***.

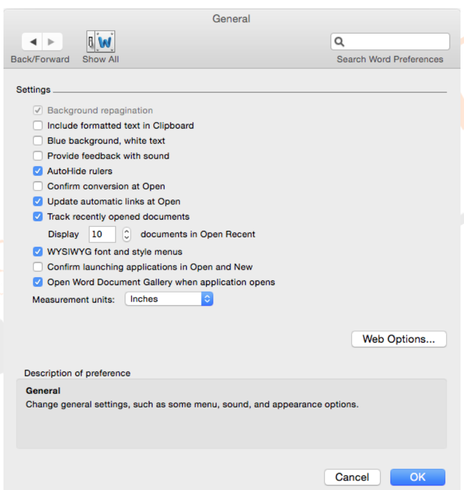




CONFIGURE ADVANCED SETTINGS

For the following section – you will go to *Word> Peferences*

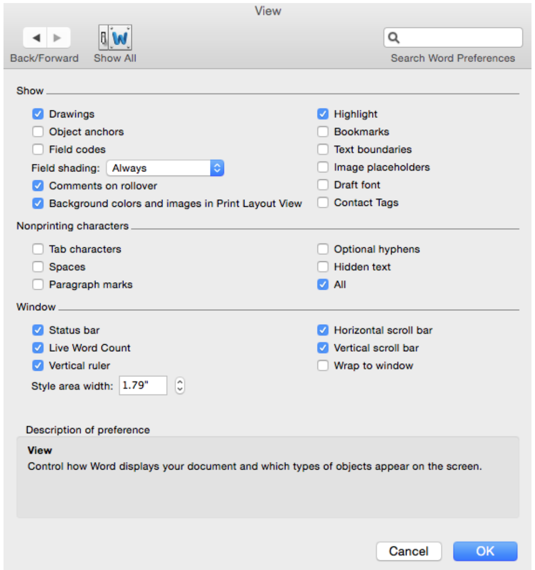
General



The default settings in the General Dialog are, well, Generally Acceptable.

If you want your rulers to stay put, you should definitely uncheck ***AutoHide.***

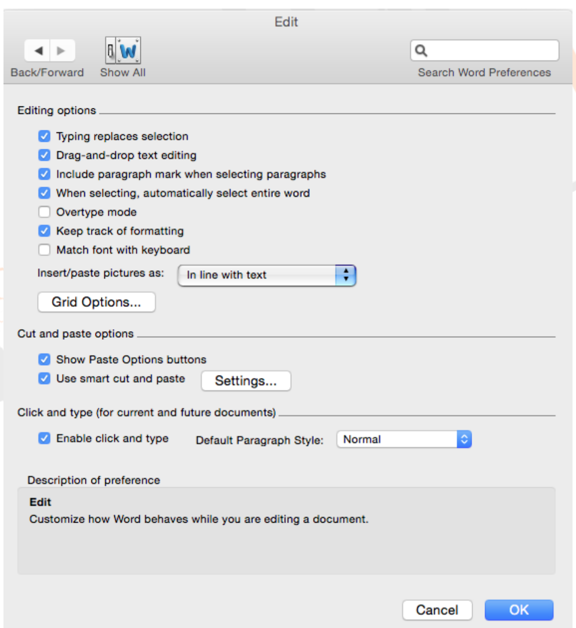
View



The View Dialog has some interesting options:

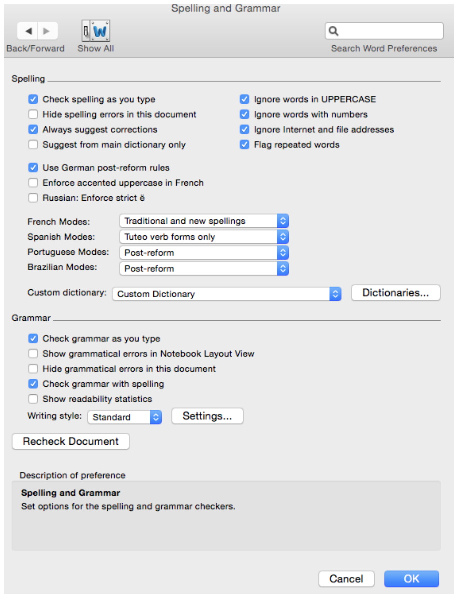
- Set ***Field Shading*** to ***Always***, which will make field codes like date and page show in grey so you know they are there.
- Leave ***Nonprinting characters*** at ***All***, meaning they will show and hide when you click the ¶ button.
- Increase the ***Style Area Width*** to at least 1 inch to see Styles in the Draft View.

Edit



The Edit dialog is usually good by default, with one exception. Deselect ***Enable click and type***. This little feature will, if you click in the middle of a blank space, insert returns and tabs to force you to type at that point.

Spelling and Grammar



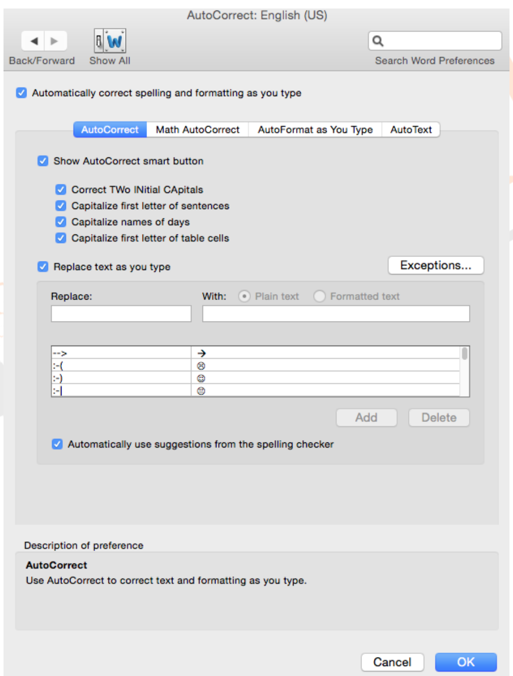
The Spelling and Grammar dialog hides a few very special settings:

Ignore words in UPPERCASE – definitely turn that off!

Ignore words with numbers – up to you.

The ***Recheck Document*** button is handy if you accidently accepted a misspelling by mistake and lets you start over.

AutoCorrect and AutoFormat as You Type***

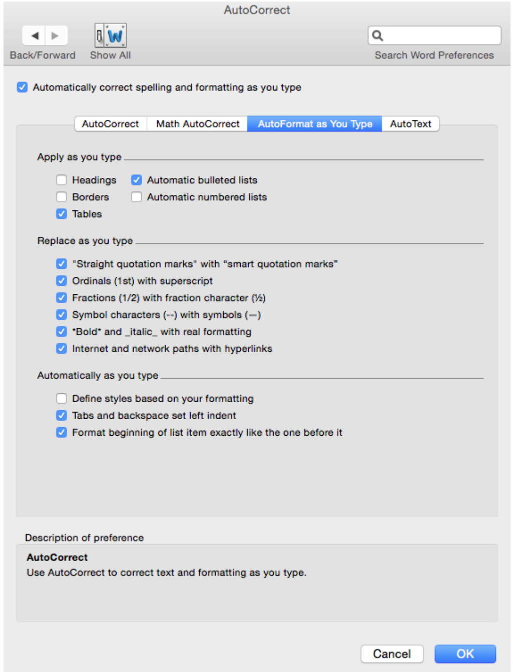


The AutoCorrect Dialog:

Correct Two Initial CApitals. This is a “type of work” option. If you regularly type AEtna, for example, turn it off.

Capitalize first letter of sentences – a true personal preference.

Replace text as you type – remove things from the list that drive you crazy. And hey – add some too! For instance, remove the entries that turn this (c) into this ©, and (r) same for ® symbol.



The AutomFormat as You Type Dialog.

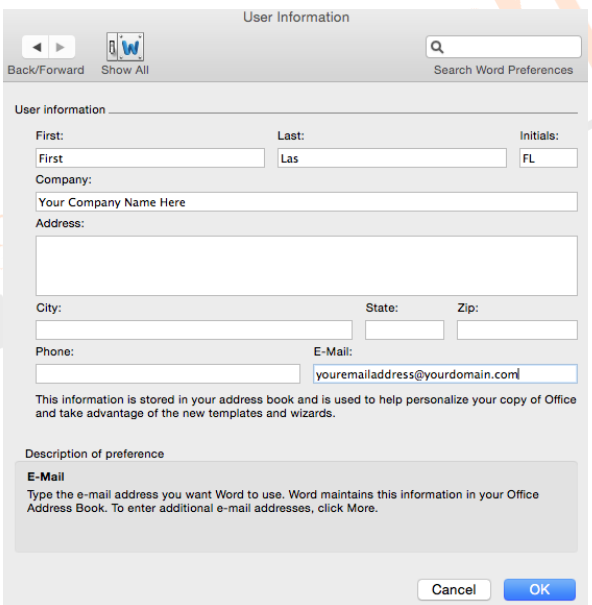
This is where you control what formatting happens without you ever wanting it to. MOST of these should be turned off, with a couple of possible exceptions:

Straight quotations – if you like them curled “left and right” leave it on. If you want them to look the same on both ends, turn it off.

Ordinals will look like this: 1^{st} 2^{nd} 3^{rd} 4^{th} 5^{th} automatically.

***Remember, even if you don’t get this done, UNDO is your first line of defense.

User Information



The User Information Dialog

This should be appropriately filled in for the correct name to come up on things like Track Changes.

KEYBOARD SHORTCUTS (MAC)

Function keys

Note If you are using a MacBook, to use a function key, you must press the fn key (the lower left key on the keyboard) at the same time.

To	Press
Undo the last action	F1
Cut text or graphics	F2
Copy text or graphics	F3
Paste the Clipboard contents	F4
Choose the Go To command (Edit menu)	F5
Go to the next pane or frame	F6
Choose the Spelling and Grammar command (Tools menu)	F7
Extend a selection This keyboard shortcut conflicts with a default Mac OS X key assignment. To use this Office keyboard shortcut, you must first turn off the Mac OS X keyboard shortcut for this key. On the Apple menu, click System Preferences. Under Hardware, click Keyboard. Click the Keyboard Shortcuts tab, and then clear the On check box for the key assignment that you want to turn off.	F8
Update selected fields. This keyboard shortcut conflicts with a default Exposé key assignment in Mac OS X version 10.3 or later. To use this Office keyboard shortcut, you must first turn off the Exposé keyboard shortcut for this key. On the Apple menu, click System Preferences. Under Personal, click Exposé & Spaces. Under Keyboard and Mouse Shortcuts, on the pop-up menu for the shortcut that you want to turn off, click –.	F9
Go to the next field. This keyboard shortcut conflicts with a default Exposé key assignment in Mac OS X version 10.3 or later. To use this Office keyboard shortcut, you must first turn off the Exposé keyboard shortcut for this key. On the Apple menu, click System Preferences. Under Personal, click Exposé & Spaces. Under Keyboard and Mouse Shortcuts, on the pop-up menu for the shortcut that you want to turn off, click –.	F11
Choose the Save As command (File menu).	⌘+ SHIFT + S
Copy text	SHIFT + F2
Change letters to upper, lower, or mixed case	SHIFT + F3
Repeat a Find or Go To action	SHIFT + F4
Move to the previous insertion point	SHIFT + F5

To	Press
Go to the previous pane or frame	SHIFT + F6
Choose the Thesaurus command (Tools menu)	SHIFT + F7
Shrink a selection This keyboard shortcut conflicts with a default Exposé key assignment in Mac OS X version 10.3 or later. To use this Office keyboard shortcut, you must first turn off the Exposé keyboard shortcut for this key. On the Apple menu, click System Preferences. Under Personal, click Exposé & Spaces. Under Keyboard and Mouse Shortcuts, on the pop-up menu for the shortcut that you want to turn off, click –.	SHIFT + F8
Switch between a field code and its result. This keyboard shortcut conflicts with a default Exposé key assignment in Mac OS X version 10.3 or later. To use this Office keyboard shortcut, you must first turn off the Exposé keyboard shortcut for this key. On the Apple menu, click System Preferences. Under Personal, click Exposé & Spaces. Under Keyboard and Mouse Shortcuts, on the pop-up menu for the shortcut that you want to turn off, click –.	SHIFT + F9
Display a shortcut menu. This keyboard shortcut conflicts with a default Exposé key assignment in Mac OS X version 10.3 or later. To use this Office keyboard shortcut, you must first turn off the Exposé keyboard shortcut for this key. On the Apple menu, click System Preferences. Under Personal, click Exposé & Spaces. Under Keyboard and Mouse Shortcuts, on the pop-up menu for the shortcut that you want to turn off, click –.	SHIFT + F10
Go to the previous field. This keyboard shortcut conflicts with a default Exposé key assignment in Mac OS X version 10.3 or later. To use this Office keyboard shortcut, you must first turn off the Exposé keyboard shortcut for this key. On the Apple menu, click System Preferences. Under Personal, click Exposé & Spaces. Under Keyboard and Mouse Shortcuts, on the pop-up menu for the shortcut that you want to turn off, click –.	SHIFT + F11
Cut to the Spike	⌘+ F3
Close the window	⌘+ F4
Go to the next window	⌘+ F6
Expand or minimize the ribbon	OPTION + ⌘+ R
Insert an empty field	⌘+ F9

To	Press
Lock a field	⌘+ F11
Insert the contents of the Spike	⌘+ SHIFT + F3
Repeat a Find or Go To action	⌘+ SHIFT + F4
Edit a bookmark	⌘+ SHIFT + F5
Go to the previous window	⌘+ SHIFT + F6
Update linked information in a Word source document	⌘+ SHIFT + F7
Extend a selection or block (then press an arrow key)	⌘+ SHIFT + F8
Unlink a field	⌘+ SHIFT + F9
Unlock a field	⌘+ SHIFT + F11
Create an AutoText entry	OPTION + F3
Go to the next window	OPTION + F6
Find the next misspelling or grammatical error. The Check spelling as you type check box must be selected (Word menu, Preferences command, Spelling and Grammar).	OPTION + F7
Run a macro	OPTION + F8
Switch between all field codes and their results	OPTION + F9
Go to the previous window	OPTION + SHIFT + F6
Open the Dictionary	OPTION + SHIFT + F7
Run GOTOBUTTON or MACROBUTTON from the field that displays the field results	OPTION + SHIFT + F9

Moving the cursor

To move	Press

To move	Press
One character to the left	LEFT ARROW
One character to the right	RIGHT ARROW
One word to the left	OPTION + LEFT ARROW
One word to the right	OPTION + RIGHT ARROW
One paragraph up	⌘+ UP ARROW
One paragraph down	⌘+ DOWN ARROW
One cell to the left (in a table)	SHIFT + TAB
One cell to the right (in a table)	TAB
Up one line	UP ARROW
Down one line	DOWN ARROW
To the end of a line	⌘+ RIGHT ARROW or END
To the beginning of a line	⌘+ LEFT ARROW or HOME
Up one screen (scrolling)	PAGE UP
Down one screen (scrolling)	PAGE DOWN
To the top of the next page	⌘+ PAGE DOWN ⌘+ FN + DOWN ARROW (on a MacBook keyboard)
To the top of the previous page	⌘+ PAGE UP ⌘+ FN + UP ARROW (on a MacBook keyboard)
To the end of a document	⌘+ END ⌘+ FN + RIGHT ARROW (on a MacBook keyboard)
To the beginning of a document	⌘+ HOME ⌘+ FN + LEFT ARROW (on a MacBook keyboard)
To the previous insertion point	SHIFT + F5

Selecting text and graphics

Tip If you know the key combination to move the cursor, you can generally select the text by using the same key combination while holding down SHIFT . For example, ⌘+ RIGHT ARROW moves the cursor to the next word, and ⌘+ SHIFT + RIGHT ARROW selects the text from the cursor to the beginning of the next word.

To extend a selection	Press
By selecting multiple items that	Select the first item that you want, hold down

To extend a selection	Press
are not next to each other	⌘, and then select any additional items
One character to the right	SHIFT + RIGHT ARROW
One character to the left	SHIFT + LEFT ARROW
One word to the right	SHIFT + OPTION + RIGHT ARROW
One word to the left	SHIFT + OPTION + LEFT ARROW
To the end of a line	⌘+ SHIFT + RIGHT ARROW or SHIFT + END
To the beginning of a line	⌘+ SHIFT + LEFT ARROW or SHIFT + HOME
One line down	SHIFT + DOWN ARROW
One line up	SHIFT + UP ARROW
To the end of a paragraph	⌘+ SHIFT + DOWN ARROW
To the beginning of a paragraph	⌘+ SHIFT + UP ARROW
One screen down	SHIFT + PAGE DOWN
One screen up	SHIFT + PAGE UP
To the beginning of a document	⌘+ SHIFT + HOME
To the end of a document	⌘+ SHIFT + END
To the end of a window	OPTION + ⌘+ SHIFT + PAGE DOWN
To select the entire document	⌘+ A
To a vertical block of text	⌘+ SHIFT + F8 , and then use the arrow keys; press ⌘+ PERIOD to cancel selection mode
To a specific location in a document	F8 , and then use the arrow keys; press ⌘+ PERIOD to cancel selection mode

Selecting text and graphics in a table

To	Press
Select the next cell's contents	TAB
Select the preceding cell's contents	SHIFT + TAB
Extend a selection to adjacent cells	Hold down SHIFT and press an arrow key repeatedly
Select a column	Click in the column's top or bottom cell. Hold down SHIFT and press the UP ARROW or DOWN ARROW key repeatedly
Extend a selection (or block)	⌘+ SHIFT + F8 , and then use the arrow keys; press ⌘+ PERIOD to cancel selection mode
Reduce the selection size	SHIFT + F8
Select multiple cells, columns, or rows that are not next to each other	Select the first item that you want, hold down ⌘, and then select any additional items

Extending a selection

To	Press
Turn extend mode on	F8 This keyboard shortcut conflicts with a default Mac OS X key assignment. To use this Office keyboard shortcut, you must first turn off the Mac OS X keyboard shortcut for this key. On the Apple menu, click System Preferences. Under Hardware, click Keyboard. Click the Keyboard Shortcuts tab, and then clear the On check box for the key assignment that you want to turn off.
Select the nearest character to the left	F8 , and then press LEFT ARROW
Select the nearest character to the right	F8 , and then press RIGHT ARROW
Expand a selection	Continue to press F8 to expand the selection to the entire word, sentence, paragraph, section, and so on.
Reduce the size of a selection	SHIFT + F8
Turn extend mode off	⌘+ PERIOD

Editing text and graphics

To	Press
Copy text or graphics	⌘+ C or F3
Copy a style	⌘+ SHIFT + C
Paste a style	⌘+ SHIFT + V
Copy text or graphics to the Scrapbook	CONTROL + OPTION + C
Move text or graphics	⌘+ X or F2 (then move the cursor and press ⌘+ V or F4)
Insert graphics using the Media Browser	⌘+ CONTROL + M
Create AutoText	OPTION + F3
Insert AutoText	⌘+ OPTION + SHIFT + V
Paste the Clipboard contents	⌘+ V or F4
Paste the selected clipping from the Scrapbook	CONTROL + OPTION + V
Paste special	⌘+ CONTROL + C

To	Press
Paste and match the formatting of the surrounding text	⌘+ OPTION + SHIFT + V
Paste to the Scrapbook	CONTROL + OPTION + V
Paste the Spike contents	⌘+ SHIFT + F3
Delete one character to the left	DELETE
Delete one word to the left	⌘+ DELETE
Delete one character to the right	⌦or CLEAR
Delete one word to the right	⌘+ ⌦
Cut selected text to the Clipboard	⌘+ X or F2
Undo the last action	⌘+ Z
Cut to the Spike	⌘+ F3

Aligning and formatting paragraphs

To	Press
Center a paragraph	⌘+ E
Justify a paragraph	⌘+ J
Left align a paragraph	⌘+ L
Right align a paragraph	⌘+ R
Indent a paragraph from the left	CONTROL + SHIFT + M
Remove a paragraph indent from the left	⌘+ SHIFT + M
Create a hanging indent	⌘+ T
Remove a hanging indent	⌘+ SHIFT + T
Start AutoFormat	⌘+ OPTION + K
Apply the Normal style	⌘+ SHIFT + N
Apply the Heading 1 style	⌘+ OPTION + 1
Apply the Heading 2 style	⌘+ OPTION + 2
Apply the Heading 3 style	⌘+ OPTION + 3
Apply the List style	⌘+ SHIFT + L
Insert a nonbreaking space	OPTION + SPACEBAR

Setting line spacing

To set line spacing to	Press
Single-spaced lines	⌘+ 1
Double-spaced lines	⌘+ 2
1.5-line spacing	⌘+ 5
Add or remove one line of space directly preceding a paragraph	⌘+ 0 (zero)

Formatting characters

To	Press
Change the font	⌘+ SHIFT + F
Increase the font size	⌘+ SHIFT + >
Decrease the font size	⌘+ SHIFT + <
Increase the font size by 1 point	⌘+]
Decrease the font size by 1 point	⌘+ [
Change the formatting of characters (Font command, Format menu)	⌘+ D
Change the case of letters	SHIFT + F3
Format in all capital letters	⌘+ SHIFT + A
Apply bold formatting	⌘+ B
Apply an underline	⌘+ U
Underline words but not spaces	⌘+ SHIFT + W
Double-underline text	⌘+ SHIFT + D
Apply italic formatting	⌘+ I
Format in all small capital letters	⌘+ SHIFT + K
Apply subscript formatting (automatic spacing)	⌘+ EQUAL SIGN
Apply superscript formatting (automatic spacing)	⌘+ SHIFT + PLUS SIGN
Remove manual character formatting	⌘+ SHIFT + Z
Apply strike-through formatting	⌘+ SHIFT + X

Inserting special characters

To insert	Press
A field	⌘+ F9
A line break	SHIFT + RETURN
A page break	SHIFT + ENTER
A column break	⌘+ SHIFT + RETURN
A nonbreaking hyphen	⌘+ SHIFT + HYPHEN
The copyright symbol	OPTION + G
The registered trademark symbol	OPTION + R
The trademark symbol	OPTION + 2
An ellipsis	OPTION + SEMICOLON

Inserting fields

To insert	Press
A DATE field	CONTROL + SHIFT + D

To insert	Press
A LISTNUM field	⌘+ OPTION + SHIFT + L
A PAGE field	CONTROL + SHIFT + P
A TIME field	CONTROL + SHIFT + T
An empty field	⌘+ F9

Working with fields

To	Press
Update selected fields	F9
Unlink a field	⌘+ SHIFT + F9
Switch between a field code and its result	SHIFT + F9
Switch between all field codes and their results	OPTION + F9
Run GOTOBUTTON or MACROBUTTON from the field that displays the field results	OPTION + SHIFT + F9
Go to the next field	F11
Go to the previous field	SHIFT + F11
Lock a field	⌘+ F11
Unlock a field	⌘+ SHIFT + F11

Document outline

To	Press
Promote a paragraph	CONTROL + SHIFT + LEFT ARROW
Demote a paragraph	CONTROL + SHIFT + RIGHT ARROW
Demote to body text	⌘+ SHIFT + N
Move selected paragraphs up	CONTROL + SHIFT + UP ARROW
Move selected paragraphs down	CONTROL + SHIFT + DOWN ARROW
Expand text under a heading	CONTROL + SHIFT + PLUS SIGN
Collapse text under a heading This keyboard shortcut conflicts with a default Mac OS X key	CONTROL + SHIFT + MINUS SIGN

To	Press
assignment. To use this Office keyboard shortcut, you must first turn off the Mac OS X keyboard shortcut for this key. On the Apple menu, click System Preferences. Under Hardware, click Keyboard. Click the Keyboard Shortcuts tab, and then clear the On check box for the key assignment that you want to turn off.	
Expand all body text and headings or collapse all body text	CONTROL + SHIFT + A
Show the first line of body text or all body text	CONTROL + SHIFT + L
Show all headings with the specified heading level	CONTROL + SHIFT +<HEADING LEVEL>

Reviewing documents

To	Press
Insert a comment	⌘+ OPTION + A
Turn track changes on or off	⌘+ SHIFT + E
Go to the beginning of a comment	HOME
Go to the end of a comment	END (The END key is not available on all keyboards)
Go to the beginning of the list of comments when in the Reviewing Pane	⌘+ HOME
Go to the end of the list of comments when in the Reviewing Pane	⌘+ END

Printing documents

To	Press
Print a document	⌘+ P

Moving around in a table

To	Press
Move to the next cell	TAB (If the cursor is in the last cell of a table, pressing TAB adds a new row)
Move to the preceding cell	SHIFT + TAB
Move to the preceding or next row	UP ARROW or DOWN ARROW
Move to the first cell in the row	CONTROL + HOME
Move to the last cell in the row	CONTROL + END

To	Press
Move to the first cell in the column	CONTROL + PAGE UP
Move to the last cell in the column	CONTROL + PAGE DOWN
Start a new paragraph	RETURN
Add a new row at the bottom of the table	TAB at the end of the last row
Add text before a table at the beginning of a document	RETURN at the beginning of the first cell
Insert a row	⌘+ CONTROL + I

Resizing table columns by using the ruler

To	Press the shortcut keys, and then drag a marker on the ruler
Retain column sizes to the right Change table width	No key
Move a single column line Retain table width	SHIFT
Equally resize all columns to the right Retain table width	⌘+ SHIFT
Proportionally resize all columns to the right Retain table width	⌘

Resizing table columns directly in a table

Tips

- To display a column's measurements in the ruler when you resize the column, press OPTION with these shortcut keys.
- To finely adjust a column width, turn off snap-to functionality by pressing OPTION with the shortcut keys.

To	Press the shortcut keys, and then drag a column boundary
Move a single column line	No key

To	Press the shortcut keys, and then drag a column boundary
Retain table width Retain column sizes to the right	SHIFT
Change table width Equally resize all columns to the right	⌘+ SHIFT
Retain table width Proportionally resize all columns to the right	⌘
Retain table width	

Inserting paragraphs and tab characters in a table

To insert	Press
New paragraphs in a cell	RETURN
Tab characters in a cell	OPTION + TAB

Data merge

To use the following keyboard shortcuts, you must first set up a data merge.

To	Press
Merge a document	CONTROL + SHIFT + N
Edit a data-merge data document	CONTROL + SHIFT + E
Check for errors	CONTROL + SHIFT + K
Insert a merge field	CONTROL + SHIFT + F

Footnotes and endnotes

To insert	Press
A footnote	⌘+ OPTION + F
An endnote	⌘+ OPTION + E

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Keyboard Shortcuts: Word for Mac

⌘ **COMMAND (CMMD) KEY**
^ **CONTROL KEY**
⌥ **OPTION (OPT) KEY- "ALT" MAY ALSO APPEAR ON THIS KEY**

CMMD + SHIFT + A All caps
CMMD + OPT + 1 Apply heading 1
CMMD + OPT + 2 Apply heading 2
CMMD + OPT + 3 Apply heading 3
CMMD + SHIFT + L Apply list bullet
CMMD + OPT + K Auto format
CMMD + B Bold
CMMD + SHIFT + F5 Bookmark
CMMD + PAGE DOWN Browse next
CMMD + PAGE UP Browse previous
CMMD + PERIOD Cancel
CMMD + E Center paragraph
SHIFT + F3 Change case
CMMD + OPT + C Change case
SHIFT + RIGHT ARROW Character right extend
CMMD + W Close
CMMD + OPT + W Close all
CMMD + SHIFT + C Close pane
CMMD + SHIFT + RETURN Column break
CMMD + SHIFT + F8 Column select
CMMD + C Copy
CMMD + SHIFT + C Copy format
SHIFT + F2 Copy text
OPT + CTRL + C Copy to scrapbook
OPT + F3 Create auto text
OPT + CTRL + NUMPAD- Customize keyboard
CMMD + OPT + NUMPAD+ Customize keyboard shortcut
CMMD + X Cut
CTRL + SHIFT + D Date field
OPT + SHIFT + F7 Define reference
CMMD + OPT + SHIFT + R Define reference
CMMD + DELETE Delete back word
OPT + DELETE Delete back word
CMMD + CTRL + X Delete row
CMMD + OPT + G Delete word
CMMD + F4 Document close
CMMD + M Document minimize
CMMD + F5 Document restore
CTRL + F5 Document restore
CMMD + OPT + S Document split
CMMD + SHIFT + D Double underline
OPT + SHIFT + PAGE DOWN End of column
CTRL + PAGE DOWN End of column
CMMD + SHIFT + END End of document Extend
CMMD + END End of document
OPT + END End of document
CMMD + RIGHT ARROW End of line
CTRL + DOWN ARROW End of line
SHIFT + END End of line extend
CMMD + SHIFT + RIGHT ARROW End of line
CTRL + DOWN ARROW End of line

Keyboard Shortcuts: Word for Mac 2011

SHIFT + END End of line extend

CMMD + SHIFT + RIGHT ARROW End of line extend

OPT + SHIFT + END End of row

CTRL + END End of row

CMMD + OPT + PAGE DOWN End of window

CMMD + OPT + SHIFT + PAGE DOWN End of window extend

CMMD + OPT + E Endnote now

CMMD + F Find

CMMD + SHIFT + G Find previous

CMMD + OPT + F Footnote now

SHFT + F5 Go back

CMMD + OPT + Z Go back

CMMD + OPT + G Go To

OPT + PAGE DOWN Go to next section

CMMD + PAGE UP Go to previous section

CMMD + SHIFT + PERIOD Grow font

CMMD +] Grow font one point

CMMD + / Help

CTRL + SHIFT + H Hidden

CMMD + K Hyperlink

CTRL + SHIFT + M Indent

CMMD + CTRL + I Insert row

CMMD + I Italic

CMMD + SHIFT + I Italic

CMMD + J Justify paragraph

CMMD + L Left paragraph

CMMD + OPT + SHIFT + L List number field

OPT + F8 Macro

CMMD + OPT + SHIFT + I Mark citation

CMMD + OPT + SHIFT + X Mark index entry

CMMD + OPT + SHIFT + O Mark table of contents entry

CTRL + SHIFT + F Merge field

CMMD + SHIFT + P New

OPT + F7 Next misspelling

CMMD + OPT + N Normal

CMMD + SHIFT + N Normal style

OPT + SHIFT + CLEAR Normal style

CMMD + O Open

CMMD + 0 Open or close up paragraph

CMMD + COMMA Options

SHIFT + ENTER Page break

PAGE DOWN Page down

SHIFT + PAGE DOWN Page down extend

PAGE UP Page up

SHIFT + PAGE UP Page up extend

CMMD + DOWN ARROW Paragraph down

OPT + DOWN ARROW Paragraph down

CMMD + SHIFT + DOWN ARROW Paragraph down extend

Keyboard Shortcuts: Word for Mac 2011

OPT + SHIFT + DOWN ARROW Paragraph down extend
CMMD + UP ARROW Paragraph up
COPT + UP ARROW Paragraph up
CMMD + SHIFT + UP ARROW Paragraph up extend
OPT + SHIFT + UP ARROW Paragraph up extend
CMMD + OPT + M Paragraph
CMMD + V Paste
CMMD + OPT + SHIFT + V Paste destination formatting
CMMD + SHIFT + V Paste format
OPT + CTRL + V Paste from scrapbook
CMMD + CTRL + V Paste special
SHIFT + F11 Previous field
CMMD + OPT + UP ARROW Previous object
CMMD + SHIFT + F6 Previous window
OPT + SHIFT + F6 Previous window
CMMD + P Print
CMMD + Y Redo or repeat
OPT + RETURN Redo or repeat
CMMD + G Repeat find
SHIFT + F4 Repeat find
CMMD + SHIFT + F4 Repeat find
CMMD + SHIFT + H Replace
CMMD + SHIFT + Z Reset character
CTRL + SPACEBAR Reset character
CMMD + OPT + Q Reset paragraph
CMMD + SHIFT + E Revision marks toggle
CMMD + R Right paragraph
CMMD + S Save
CMMD + SHIFT + S Save as
CMMD + ENTER Section break

CMMD + A Select all
CMMD + SHIFT + COMMA Shrink font
CMMD + [Shrink font one point
CMMD + SHIFT + K Small caps
CMMD + 1 Space paragraph 1
CMMD + 5 Space paragraph 1.5
CMMD + 2 Space paragraph 2
CMMD + SHIFT + F3 Spike
CMMD + F3 Spike
CTRL + UP ARROW Start of line
CMMD + SHIFT + X Strikethrough
CMMD + = Subscript
CMMD + SHIFT + = Superscript
CMMD +OPT + CTRL + R Thesaurus
CTRL + SHIFT + T Time field
SHIFT + F9 Toggle field display
**CTRL + ** Toggle master subdocuments
CMMD + SHIFT + T Un-hang
CMMD + SHIFT + M Un-indent
CMMD + U Underline
CMMD + SHIFT + U Underline
CMMD + Z Undo
OPT + LEFT ARROW Word left
OPT + SHIFT + LEFT ARROW Word left extend
OPT + RIGHT ARROW Word right
OPT + SHIFT + RIGHT ARROW Word right extend
CMMD + SHIFT + W Word underline