



LJN'S

# LEGAL TECH

Newsletter®

Volume 22, Number 7 • October 2004

## PRACTICE TIP

### Using Rules To Organize Your Outlook Inbox

By Sarita Livit

How often have you been faced with the challenge of locating an important e-mail message in an impossible sea of an unorganized Inbox? Where is that meeting again? What is that date again? If you are like most of us, you give up before the search has begun because the volume of messages makes locating one, a daunting if not impossible task — "I'll never find the message in this mess."

On average I estimate that my Inbox receives over a hundred new messages each day. That's a lot of messages, and I don't believe that I am all that unique. Luckily, many of those messages can be purged immediately, but a handful often need to be retained — at least for the time being. So, what do you do with the remaining messages? How can you organize them and keep your Inbox uncluttered? Most importantly, how can you find important messages WHEN you need them?

Outlook provides you with the ability to create rules or alerts to manage and organize your Inbox.

#### WHAT IS A RULE?

A rule is a set of conditions, exceptions and actions that processes and organizes messages automatically, and is triggered by an event. Rules serve two basic

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### Controlling The Information Flood: Are You Ready To Wade In These Waters?

By Tom Gelbman

When talking about the Internet, we are usually confronted with a good news/bad news situation. The good news is that the volume of information readily accessible via the Internet continues to grow exponentially. The bad news is that the overwhelming volume of Internet sources and content makes finding relevant information inefficient and often frustrating. The challenge is to find the proverbial needles in this ever-expanding haystack, which some sources say is expanding by 20 million pages per day.

#### THE 'CURRENT AWARENESS' CHALLENGE

In today's legal practice, "current awareness" content (aka, news and information) is a valuable component of an attorney's toolbox. Current awareness covers a wide range of information about topics related to a particular industry or company (client, prospective client, opposition), and relevant issues that can be applied to both practice and marketing efforts.

Legal content (statutes, case law, treatises, regulations, etc.) traditionally delivered through legal research vehicles such as Westlaw and LexisNexis have been around for a long time. This information is typically acquired through a "pull" process of search and retrieval, and is typically applied to the attorney's current caseload. While legal content is at the core of the attorney's information resource needs in the legal practice, current awareness information that can keep the attorney informed and up to date on events related to a case, or help acquire new clients and matters, is rapidly becoming a core requirement.

Tools are now becoming available that can streamline the flow of news and information by "pushing" information to the attorney in a form and timeframe that can be customized to the needs and interests of the individual attorney. Current awareness search and retrieval tools can deliver highly filtered and relevant information that can be consumed (read, saved, or deleted) at time and place that best fits the attorney's work habits. In an ideal world, this may be close to the mythical R<sup>3</sup>

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PERIODICALS

# Information Flood

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(delivering the **Right** information to the **Right** person at the **Right** time). In reality, this is likely an unattainable aspiration with the shifting sands of today's business environment, but there is a way of moving in the right direction toward — delivering useful news and information on a timely basis. These tools can be used to automatically search through hundreds or perhaps thousands of web sites to bring needed information to the attorney's fingertips with a relatively low level of time and effort.

## TOOLS

RSS (Real Simple Syndication) is a communication protocol that is a subset of XML (Extensible Markup Language), a core technology for the Internet. It is a relatively new tool that can address the problem of finding and delivering timely and valuable content to the desktop. Tools employing RSS technology can be constructed to watch designated Web sites and Weblogs (aka, blogs) and deliver a RSS feed, consisting of a headline and a link to the full text to a RSS reader, browser or e-mail inbox on the desktop. If the user finds the headline of interest, a mouse-click on the link takes the user to the full text of the content, usually displayed in the browser.

Sounds simple, but it does take a bit of work to set up. To be effective, these tools must allow for fine tuning to simplify the process of filtering feeds to broaden or narrow the flow of content, simplify presentation of content feeds; eliminate duplication; and present content in a context that is complimentary to the way the attorney works. When properly configured, this current awareness feed allows users to subscribe to hundreds

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or thousands of feeds, and distill content down to specific interests and display results in a way that supports individual work habits. The primary benefit is that the user sees only headlines, making it easy to focus on the most interesting content. Best of all, content can be delivered to the desktop without incurring those nuisance pop up ads and email spam. Feeds can also be delivered to a PDA or cell phone — where and when it best suits the content consumer.

RSS has been around for several years — originating with Netscape in the 1990s — with early use mostly by bloggers (publishers of Weblogs), but it is just now gaining attention of business users. The number of news and information outlets as well as bloggers that provide RSS feeds is growing rapidly. Notable news outlets include the *New York Times*, Reuters, *Wall Street Journal*, *Washington Post* and BBC. RSS readers gaining popularity include RSSReader, FeedDemon, AWASU, and Pluck.

Similar tools include: BOTs — software agents that can be programmed to search for specific content and report back; and Spiders — programs that crawl the Web and develop indexes for search and retrieval (eg, Google, Portal agents). A recent addition to the scene is Microsoft/MSNBC's Newsbot test, which reports access to 4800 English language news outlets.

## HOW IT WORKS

The RSS reader receives feeds from Web sites or blogs. This RSS feed is a text document containing a list of content items — each item with a headline, description and link to the original content that is available on a Web site. The user “subscribes” to the feed and the content flows. Software tools (RSS readers, Spiders, BOTs, Aggregators, *et al*), depending on sophistication, can also filter, prioritize, and eliminate duplicate content feeds (de-duping).

Not surprising, alternative/competitive protocols to RSS are also in play — such as ATOM. Time will tell which protocol survives, but suffice to say this kind of content search and delivery function has promise, and most readers support both formats.

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# LEGAL TECH Newsletter®

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LJN's Legal Tech Newsletter P0000-223  
Periodicals Postage Pending at Philadelphia, PA  
POSTMASTER: Send address changes to:  
American Lawyer Media  
1617 JFK Blvd., Suite 1750, Philadelphia, PA 19103  
Annual Subscription: \$279

Published Monthly by:  
Law Journal Newsletters  
1617 JFK Boulevard, Suite 1750, Philadelphia, Pa 19103  
www.ljnonline.com

# Law Firms Focus On Internal Systems

By Amy Kolz

Law firms are starting to spend on technology again, focusing on projects that will help the enterprise run more smoothly and efficiently. Not that many years ago, before the economic downturn, firms were toying with Web-based systems to manage client relationships and other newfangled ideas. In the lean years, those projects fell by the wayside, and firms show no signs of reviving them anytime soon.

The central theme of the ninth annual survey conducted by *Legal Tech's* sibling publication *AmLaw Tech*, is simple: Firms are making roof repairs rather than remodeling the kitchen. This year, *AmLaw Tech* received responses from 173 of the 200 highest-grossing U.S. firms. Those responses provide a profile of the technological priorities and goals of the leading U.S. firms.

Today, 55% of the firms report increases in operating budgets, and 83% report increases in capital budgets. When the survey asked the question last year, the increases were 40% and 46%, respectively. With these replenished technology budgets, firms are looking inward to upgrade their existing systems, ensuring that lawyers have the tools to practice efficiently. And they're seeking cost savings in areas as diverse as Internet telephony and back-office financial software.

"We always ask with each piece of new software, 'How many accountants can we fire?'" quipped Stuart Freeman, director of administration at Edwards & Angell.

Remote access is one of the key areas where firms are devoting money. Lawyers now demand more than just basic connections to e-mail and Word documents when they're out of the office. They have embraced electronic address books, document-management systems and deal rooms, and are reluctant to sacrifice those tools when working on-site with a client or when away on vacation. Plus, Sept. 11, 2001, the 2003 blackout and the recent political

**Amy Kolz** writes for the American Lawyer Media News Service.

conventions have highlighted the need for lawyers to access firm systems when stranded outside the office walls.

"Communications and mobility are major themes [this year]," said Michael Mills, director of professional services and systems at Davis Polk & Wardwell. The New York-based firm recently created a Web portal that allows lawyers to log onto the firm's internal network from any device with a browser. It could be a computer or one of those airport kiosks providing online access. The portal gives attorneys another access option in addition to the firm's traditional Citrix systems, Mills said. Citrix is a brand of network software that allows lawyers to connect laptops to the firm's servers. One downside: Lawyers must be working on computers loaded with Citrix software.

"Today there is a constantly growing need for lawyers to be able to work with all of their tools from anywhere," Mills said. "And we're figuring out how to make that easy."

Similarly, Sidley Austin Brown & Wood installed an upgraded, secure virtual private network that gives lawyers an alternative to the firm's traditional high-speed access through Citrix. Nancy Karen, the firm's chief information officer, said that Sidley's new virtual private network enables access to a broader suite of applications. It is also easier for lawyers to use than previous remote-access systems.

Sidley lawyers can now send faxes from their laptops. (They couldn't before.) This is helpful to lawyers who worry about prying eyes at hotel business centers or those who don't pack a portable printer. The virtual network also allows lawyers to synchronize their laptop and office e-mail.

Of course, the ubiquitous BlackBerry is still a key weapon in the mobile lawyer's arsenal. BlackBerry and other wireless e-mail units grew in popularity among the 200 highest-grossing firms. This year, 77% of firms said that they supply lawyers with wireless e-mail units, compared with 73% in 2003 and 51% in 2002. Nearly all firms that supply them hand them out to all lawyers, not just partners.

Lawyers' love affair with wireless has boundaries. Firms haven't been as easily convinced as Starbucks and

Barnes & Noble that WiFi hot spots make sense. Sixty percent have wireless networks installed in at least one location, compared with 47% in last year's survey. But 61% of those firms are installing them just in conference rooms, and only 16% are installing them in entire offices.

Many firms are taking a measured approach to wireless networks — ensuring that security is adequate and that the investment enhances lawyer productivity. San Francisco's Morrison & Foerster has only begun to outfit conference rooms.

"We were not on the forefront of wireless because we didn't want to provide access to everyone who walked by. I didn't want to see a chalked [WiFi] mark outside our office," explained technology head Jo Haraf. Haraf expects to complete one-third of the conference rooms by the end of 2004 and the rest by 2005. The firm's annual computer security test will focus this year on probing the wireless security as an additional safeguard.

Others aren't convinced that the risks are worth the effort. Skadden, Arps, Slate, Meagher & Flom of New York and Wilmer Cutler Pickering Hale and Dorr have rejected WiFi for now, citing security concerns.

Still, the technology is especially attractive for larger law offices where individuals are more likely to move around, said Orrick, Herrington & Sutcliffe's chief information officer, Patrick Tisdale. Orrick has installed wireless networks throughout the office in its new San Francisco headquarters for that reason.

## LARGER UPGRADES

Technology upgrades, like the economy, are cyclical. Every two to four years, a firm's equipment, processing power and software become obsolete. But this year, several firms seemed to be making larger upgrades, inspired by recent technological innovation and heftier budgets. "There has been a little bit of a loosening of the purse strings," explained Eva Steiner, director of information technology at New York's Dewey Ballantine.

The technology department at New York's Shearman & Sterling has

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## Citywide Internet Access?

Talk about technology becoming more accessible. The City of Philadelphia is considering turning its entire expanse of 135 square miles into the world's largest wireless Internet zone, the Associated Press has reported. For approximately \$10 million, small transmitters would be placed around the city. Each transmitter, probably placed on the top of lampposts, would then be capable of communicating with a computer-networking card. It would be the City's goal to offer the service either for free, or at costs far lower than those charged by commercial providers.

An increasing number of cities have already, or are contemplating, offering wireless Internet service to residents, workers and guests. For example, Chaska, MN, a suburb of Minneapolis, began offering citywide wireless Internet access this year for \$16 a month. The signal covers about 13 square miles. In addition, the City of Cleveland has added about 4000 wireless transmitters in its University Circle, Midtown and lakefront districts. The service is free, and available to anyone who passes through the areas.

## Internal Systems

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benefited from a 20% to 30% annual increase in its budget over the past two years after limiting its expenditures during the economic downturn. Technology chief Tony Cordeiro said that in the past year the firm has upgraded its back-end systems, including its wide-area network and internal cable infrastructure.

Next, Cordeiro wants to ensure that each practice group has the right set of applications. The firm has solicited a request for proposals from electronic evidence vendors for its litigation group. Feedback from lawyers suggested that the firm had too many software packages and not enough features. "We're trying to narrow our list [of vendors] while making sure that our requirements for the products are being met," he explained.

"The driving force [this year] was to be more internally efficient and productive," agreed Steven Agnoli, chief information officer at Kirkpatrick & Lockhart. The firm recently installed Hummingbird's latest document-management software, which allows lawyers to easily transfer e-mails into the firm's document-management system. K&L also upgraded its Thomson Elite Enterprise financial and billing systems to an easier-to-use browser-based version.

"Knowledge management" was a post-millennial buzzword that developed a nasty reputation. Some technology chiefs loved the concept of aggregating and organizing the firm's most important information. But others equated the term with costly, ambitious technology projects that had small or negative returns.

"The knowledge management tools offered to the industry for several years are just now in a state where they deliver [what they had promised]," said Orrick's Tisdale.

Chief technology officers are seeking clear, searchable systems to hold and organize best-practices documents and firm files. But there's no agreement on a standard. The leading product in the *AmLaw Tech* survey was West km, at 19%. In contrast, 43% answered "other," which included custom in-house solutions.

Pillsbury Winthrop, for example, has developed a knowledge-management system based primarily on the firm's e-mail system. The lawyers' unwillingness to learn new systems was the biggest barrier to successful knowledge management, said director of information technology Warren Jones. And if lawyers aren't consistently contributing their documents, the collection becomes outdated and useless. Pillsbury's technology department, which disbanded its original knowledge-management group in 2002, had a "eureka" moment in 2003, when it realized it could build a system around e-mail, Jones said. The system allows lawyers to drag and drop their files and e-mails into a firm database quickly in the same way that one moves messages to a personal Outlook folder.

Many other firms, such as Skadden and Kirkpatrick & Lockhart, are also working on in-house solutions. K&L is using the firm's existing software, including its Hummingbird document-management system, to reorganize existing information databases by practice group.

Most lawyers don't picture the telephone when thinking about new technology. It's hard to blame them. Only

34% of firms surveyed use a voice-over Internet protocol (VOIP) for telephone traffic. Many information technology chiefs, however, say usage is likely to increase significantly. Firms that have jumped on the VOIP bandwagon have often cut phone costs.

For example, Latham & Watkins' chief information officer, Kenneth Heaps, estimates that the firm is saving more than \$4 million a year in phone capital and operating costs. More important for lawyers, however, are the potential time-savers, such as dialing clients by clicking a telephone number listed in a document or e-mail. Lawyers "care about their own productivity. They would love to be able to go into their inbox and return a call by clicking," explained Sidley's Karen. Sidley is currently evaluating VOIP for the firm's new Chicago office, slated to open in November 2005.

Latham & Watkins is the farthest ahead of the pack. It has completely converted to VOIP, with the exception of three offices in Asia. Latham's Heaps said that lawyer productivity as much as cost savings drove the conversion. Partner Kevin Boyle raves about the results. When clients leave a voice mail, the message and a number appear via e-mail on his Treo 600 PDA and phone. Boyle is then able to click on the number, dialing the client back only seconds later. "It's a huge advance from having to check voice mail [continually]," he said.

So while repairing the roof isn't as sexy as remodeling the kitchen, this was a standout year for technology chiefs. Because in the end, it's all about making the lawyer's life a little easier.



# The Wizards Of Ozmosys

By Susan Foster

Since 2000, I have been part of the team at Clifford Chance that has been charged with getting the best information to the right people in the most timely and convenient fashion. The Knowledge Systems team, combining the library and the intranet staffs, is responsible for assuring that our legal staff has access to the news, data, and documents they require, including paper-based information and electronic content such as e-mail, the Internet, or our intranet.

In my more than 20 years as a librarian, I've seen many changes in formats and methods of delivery of publications; paper, microforms, and CD-ROMS. The Internet, of course, has become the medium of choice for many publishers and organizations, replacing paper with digital delivery of daily news and newsletters. But just like their paper relatives, it takes time to slog through a bunch of Web pages and e-mails each morning — and time is generally at a premium for most of us. How do you make this task easier?

In 2000, Clifford Chance merged with New York-based Rogers & Wells and the German firm of Punder, Volhard, Weber, & Axster. The result was the largest law firm in the world with 3500 attorneys in 29 offices worldwide. Our new organization faced many new challenges as well as opportunities to reinvent our information sharing and communication capabilities. When the merger occurred, many of the Clifford Chance offices already contributed to a system of intranets. A team was put together in the Americas to develop the intranet in our hemisphere. Its

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members included Shireen Kumar, Director of Knowledge Systems, Katherine Walkden and Christine Patterson, Web Editors, a Web-development firm, and me. We began in January of 2000 and released the first version in May. One of our most important objectives was to provide legal and corporate news from multiple sources to every attorney in an easy and practical way. We investigated our options and decided to focus on two goals: first, to deliver news from major media sources to the intranet pages of various practice groups; and second, to monitor Web pages of the most relevant companies, government agencies and professional organizations and to publish pertinent legal and regulatory items to specific intranet pages. By accomplishing these goals, our practice groups could stay up-to-date on news about our clients and other organizations of interest. Many providers existed to accomplish our first goal (news from media sources), but the second goal (news from sources generally not covered by media sources) required special functionality. For that purpose, we found Ozmosys (or perhaps they found us). Whichever way it happened, it proved to be fortuitous.

In 2000, Ozmosys was a fledgling organization, much like our fledgling intranet. Ozmosys was able to produce just what we needed — news from wherever we wanted, consolidated into one package and delivered onto our intranet pages. The basis of Ozmosys's service at the time was their Ozmobot or "bot," which would, in simple terms, search specific Web pages for new information, send it to our intranet page wherever a line of script had been inserted, formatted in any way we chose based on our own style sheets. Our first requests were for bots to deliver news to our practice area pages — Antitrust, Securities, etc. — mainly from government sources, *ie*, Justice Department, FTC, SEC. These types of agency watches proved so popular, Ozmosys has prepackaged them for delivery to its clients. Other Ozmosys alerts include major stock exchanges worldwide, law suits from major class action firms, Federal

Reserve and other national banks, U.S. Circuit Court and Supreme Court decisions, as well as news releases from the State Department, Labor Department, and many other bots of interest to the legal world.

Our information team also wanted to deliver more discreet case, client and firm information to selected groups of legal staff. In the beginning, we gave Ozmosys lists of users who would receive personalized e-mails with the daily results of our bots. They have since developed a user interface through which their clients can easily control the e-mail distribution of news alerts, although the bots scripting is still created by the Ozmosys staff. Another note, they also now prefer that their Web watches be called "alerts" (frankly I prefer the former, kitschier bot). You can see a sample alert on the Ozmosys Web site, [www.ozmosys.com](http://www.ozmosys.com). The citations are easy to read and include a headline, the Web site's name and the date the data was posted. Note, too, that there is an archive for each alert where past articles are stored as permitted by the publisher.

So, what more could you wish for? You have a program that finds, delivers and formats whatever you want, how you want it, where you want it.

How about searching for specific information? Ozmosys has enhanced their service to allow you to set up alerts that scan for specific terms. As always, you must chose specific pages to scan, not entire Web sites. We found this bit of programming to

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## Information Flood

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Aggregators of current awareness content are also starting to surface, such as NewsGator. Some of these services allow free access to content, while others provide free access to download headlines, but require a subscription fee to view details.

### FINDING THE RIGHT TOOL

Tools such as RSS readers, BOTs, Spiders provide an opportunity to significantly improve the efficiency and effectiveness of delivering relevant and current awareness content to the “pressed for time” attorney. The challenge is to make this a realistic and workable option by identifying, flexible and easy to use tools and successfully integrating them into the work environment. Flexibility and ease of use is critical to success, or this will become just another interesting tool, with limited value.

A truly flexible tool must be able to deliver content feeds where the attorney “lives” electronically, and this is not a one size fits all situation. In a recent survey of law firms, I found that most attorneys “live” in their e-mail system. Despite significant efforts by many firms to deliver content to intranets and portals, most attorneys still prefer to live in e-mail for much of the workday. Many firms report mixed results with the use of

portals and intranets. While the overwhelming majority of firms contacted indicate they have an intranet up and running, very few report success. Barriers to greater usage revolve around the ease of use issues. With time at a premium, many lawyers contacted say that it is not easy to find/navigate most portals and Intranet sites. Some compare it to a drink from a water hydrant — a visual overload that makes navigation overly complex and difficult.

### APPROACH

As with most new technologies, finding a solution that fits the work environment and delivers value is the real challenge, and there are no magic answers to success. But progress can be made by following a rational approach:

- **Get your feet wet.** With any new technology, there are many issues that must be understood and there is nothing better than to gain real world experience. Start on a small scale, working with support staff, IT and Library and interested attorneys. A well-constructed pilot project should produce valuable first hand experience on usability issues, technical and administrative considerations, and business value.

- **Develop a plan.** Armed with the first hand experience from the pilot, develop an overall plan for the scope and timing of integrating current

awareness content delivery systems and technology into the practice. As with any technology solution, there needs to be a clear linkage to the overall business plan and specifics regarding business value, deliverables and outcomes.

- **Find the best tools.** While there are many alternative solutions that may hold promise to streamline information content feeds to busy attorneys, the key to success will be to find the best tools that address critical issues such as:

- Subscribing to the appropriate feeds (trusted sources of public info, fee based content),
- Configuring filters that can screen out irrelevant content and utilize effective taxonomies, (legal terms, legal oriented subject matter, business terms, and business subjects).
- Methods for eliminating duplicate content (de-duping)
- Flexibility for customizing delivery options into email, browser, RSS reader, portal, and intranet.

### BOTTOM LINE

In the legal sector, the current awareness wave is starting to crest as tools become available that simplify the process of delivering relevant news and information to the busy attorney. Are you ready to get your feet wet?



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## Wizards of Ozmosys

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be helpful for providing corporate intelligence, searching through a series of company Web pages for news on products, cases, people, etc. which we generally send via e-mail to a team of our attorneys.

How about aggregating various publishers’ products? As mentioned above, many content providers have moved into the new millennium, forgoing the publishing of daily, weekly and monthly news in paper and instead choosing to publish them electronically. Ozmosys has cultivated relationships with major providers of legal and business publications like Institutional Investor, CCH, BNA, West, Courtlink and many others.

Ozmosys can combine these periodic news alerts, along with their Web alerts, into a single daily e-mail. As long as your firm has subscriptions, Ozmosys will do their magic and reduce the number of e-mails your users receive to one. Attorneys have got to appreciate having fewer e-mails to read. We have not totally worked through this process yet, but it is certainly one we are looking forward to accomplishing.

Ozmosys has helped us deal with the explosion of information from the Web in today’s global environment where being on top of the news and current developments is crucial. I feel, however, that we have only scratched the surface of what this tool can accomplish for us. The people I’ve encountered from the

company are gracious and accommodating and want us to succeed. I hope to continue the relationship, using their ideas for information distribution to simplify and personalize delivery of information to our community of legal professionals.

Ozmosys can be reached at 212-252-1940; e-mail, [info@ozmosys.com](mailto:info@ozmosys.com); or visit their Web site at [www.ozmosys.com](http://www.ozmosys.com).



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# The Perfect Conversion Utility for All Your PDFs: ABBYY PDF Transformer

By Alan Pearlman

For many of today's leading law firms PDF (Portable Document Format) files are the way to send their documents over the Internet, thus keeping a handle on others not changing the work product from what was sent! But many times, while there is a need to keep the formatting, as well as the layout and look of a document, there also may come a time when the need exists to convert a PDF file into an editable file format.

Many times I have found the necessity to be able to unlock and reposition and/or repurposing information from a PDF file. The question is how do we achieve that goal? If you remember, a few months ago I wrote about a great OCR program from ABBYY called FineReader OCR 7.0, well the same people at ABBYY have come up with a new and very worthwhile PDF program called ABBYY PDF Transformer.

This utility uses the same award-winning FineReader OCR technology and Adobe PDF library technology, to process any PDF file, regardless of origin, as well as outputting it to more file formats than any other PDF conversion utility that I have seen or worked with!

What PDF transformer does is simple. It extracts text, performs OCR and page analysis into an image file, then checks the OCR result against the extracted text and finally reconstructs the document into a user-specified format, and voila, once this process is complete, the document can now be opened in either Microsoft Word, Excel, or saved as a .doc, .xls, HTML or ASCII text. What makes this process work so well for ABBYY is that most other conversion utilities do NOT process PDFs with OCR technology and so the result here is that Transformer has the

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advantage by increased PDF file compatibility and much more accurate PDF conversion! Incidentally, by including OCR into the conversion mix, PDF Transformer is thereby able to convert any PDF — text and Image PDF, Text under Image, and Image Only!

Now we lawyers know that many times we need our documentation to be secure when we send it in our e-mail to others for review. With ABBYY PDF Transformer's inclusion of Adobe

*We lawyers know that many times we need our documentation to be secure when we send it in our e-mail to others for review.*

PDF Library technology they have better integrated the different security levels within PDF files and prompt users to enter appropriate passwords prior to converting password-protected documents. These PDF files can be protected by two types of passwords — a user password and an owner password.

Therefore, if a file is only protected by a user password, you need only to enter that correct user password in order to convert the file, if protected only by an owner password, and "content copying or extraction" is NOT allowed, you need to enter the correct owner password in order to convert a file. If the document has been protected by both passwords, and you DO ALLOW content copying, etc., either of the passwords will work to allow conversion. Finally, if both protections are enabled BUT you DO NOT ALLOW content copying, etc., then only the owner password will unlock it! I think this small analysis can show you that there are enough scenarios here for any law firm to have the correct measure of security within their PDF documents.

What I really like about this product is the fact that it will work right within Microsoft Word or Excel, fully integrating with the Microsoft Office

Suite of products. So if I am in Word or Excel, I merely select the PDF transformer from my file menu and then select the PDF I wish to convert and it then instantly displays the converted document in Microsoft Word or Excel with all of its formatting intact. Likewise you can work within Windows Explorer and right-click on the PDF file you wish to convert, a context menu pops up, you select PDF transformer and an export destination for the output and it goes right to that destination for you! Another feature not to be found in other PDF converters is that in order to speed up the process, you have the option of being able to convert only those pages of a document that you desire, you may opt to convert either the entire PDF or just certain pages.

They also make working with the program extremely user friendly. It can be a plug-in utility and worked in that manner, however, they also have a wizard interface that places an icon on your desktop and guides the user through the simple steps of conversion, so that you become more comfortable working with the program.

I think that you will find after a short time, as did I, almost everyday there is a valuable use for the ABBYY PDF Transformer. I know that I have enjoyed both working with the program and using it in the practice to maintain the integrity of my e-mail documents, while at the same time having the extraction ability for so many documents that I use in the practice. I'm sure that you will agree with me that the ABBYY PDF Transformer is a welcome addition to your law office computing software library and you will wonder why it took so long to come up with a product that does so much to enhance the value of all the PDF files currently in the marketplace at the present time!

## FACTS

ABBYY PDF Transformer is priced at \$49.99 and has a free trial version available on the web. For more product information visit them at [www.abbyyusa.com](http://www.abbyyusa.com) or e-mail sales at [sales@abbyyusa.com](mailto:sales@abbyyusa.com) you may also call them for more information at 510-226-6717.



## Practice Tip

continued from page 1

purposes: they are used either for organization or notification. Organization rules manage your messages. Notification rules alert you to new or important messages.

Some examples of how rules can be used:

- Move messages from someone to a particular folder.
- Move messages with particular subject words to a folder.
- Move messages sent to a distribution list to a folder.
- Flag messages from a particular person with a color flag.
- Delete a conversation.
- Delay delivery of messages for specified amounts of time.
- Display mail from someone in the New Item Alert Window.
- Play a sound when important messages arrive.
- Send an alert to a mobile device when a message is received from someone.
- Redirect a message to another person or distribution list.
- Assign categories to messages you send based on the contents.
- Send auto reply messages.
- Automatically start a program.
- Automatically delete "junk" mail.

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## SETTING UP

Creating rules are fairly simple to do. The easiest way to setup a rule is to create one based upon a sample message. This also helps to avoid typographical errors. You can do this by opening a message, and then selecting Action, Create Rule to define one based upon the parameters of the selected message. Outlook also provides a Rules Wizard that guides you through the process of creating a rule and defining its actions, conditions and exceptions. In Outlook 2000 and XP you access the Wizard from the Actions menu, and then by selecting Create Rule. Many of the possible conditions and exceptions are already pre-filled for you. You should redefine them as necessary. In Outlook 2003, you can create rules from the Tools menu, select Rules and Alerts.

After defining your actions (move to a new folder, or delete, etc.) and its conditions (when Subject contains "Joke") and any exceptions (when From = "john smith"), it is important that you test your rule to make sure that it will behave as expected. To test a newly created rule, select "Run this Rule Now" on the messages already in the Inbox when you are done defining it. This action will execute your rule on the messages fitting your defined criteria, on messages that are already present in your Inbox. I find it very helpful to make sure that the rule will act only on the messages you want to take action on, but also allows you to scan your Inbox to make sure that you haven't forgotten to include other appropriate parameters (Subject contains "Joke" or "Funny"). If you find that the rule is not behaving as expected, or that you can fine tune it even further, edit it and continue testing until the definition works as expected.

## GENERAL TIPS TO KEEP IN MIND

- Use descriptive names when naming the folders. This will allow you to know at a glance, which messages are stored within the folder. Your rules need organization as well.
- Remember that rules are processed in the order in which they are listed. There are two categories of rules: server-side and client-side. Rules running on the server (for example Microsoft Exchange Server) always run first. Rules running in Outlook on your computer (client-side) will follow. To change the order in which your rules are executed (within either category), select the rule and then use the Move Up, Move Down buttons in 2000 and XP (or the directional arrows in 2003) in the rules menu queue.
- Ensure that the rules will run efficiently by avoiding conditions and exceptions that slow down the search and execution process. For example, rules which search for words in the message body will run slower. It takes longer to search through a body then it does through a subject.
- Also remember that specificity is crucial. It is faster to search for a specific name or word in the From or To field than it is to search through a distribution list.

Using Outlook Rules will organize and manage your messages for you. Think of how much time and frustration you will save when trying to locate an important message. Organizing them will make finding them a snap.



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ED 3038-2004