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ILTA's Microsoft Peer Group Mission Statement

ILTA's Microsoft Peer Group will provide quality educational and networking opportunities with regard to the various products and services provided by Microsoft. The Peer Group will foster a relationship between ILTA and Microsoft to assist with the release of new products/versions and provide support for existing products.



EDITOR'S NOTE

Big changes keep coming from Microsoft to you, the folks who keep all the parts running smoothly at your organization. And whether your organization's vision of technology upgrades is "bleeding edge" or "let Mikey try it," the key considerations and best practices presented in this white paper will certainly smooth the edges when it comes time to tackle an upgrade.

Our authors offer their insights into Office 2007, the future of legal documents and secure collaboration.

We gratefully acknowledge our authors for offering a look at what you can expect when you're ready to make the move.

Ken Hansen, Editor

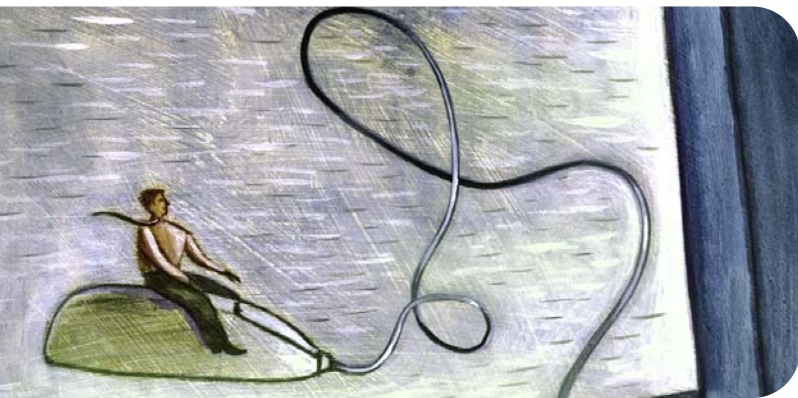
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Providing technology solutions to law firms and legal departments gets more complex every day. Connecting with your peers to exchange ideas with those who have "been there done that" has never been more valuable.

For over three decades, the International Legal Technology Association has led the way in sharing knowledge and experience for those faced with challenges in their firms and legal departments. ILTA members come from firms of all sizes and all areas of practice, all sharing a common need to have access to the latest information about products and support services that impact the legal profession.

Statement of Purpose: ILTA is the premier peer networking organization, providing information to members to maximize the value of technology in the support of the legal profession.

 **International Legal
Technology Association**



by Donna Payne and Susan Horiuchi of PayneGroup

::Office 2007

Benefits, Challenges and Compatibility

Microsoft Office 2007 is a big departure from previous versions. At first glance it seems more alien than a meeting at Area 51. The good news, however, is that after working with the software for about thirty days, you will find it to be much more intuitive and productive than earlier versions. In addition to the new interface, there are substantive improvements important for legal, corporate and government entities. For instance, there are new collaboration features in applications such as Outlook and Word. The capabilities of Excel have been greatly expanded, and PowerPoint is easier than ever to use. Of course, there are some challenges in converting to 2007; the biggest ones are related to compatibility. Fortunately, there are things that you can do to master the sharing of documents, including planning for an upgrade.

This article provides compelling reasons for moving to Office 2007. At the same time, we outline some areas that require caution during your conversion process and provide recommendations for a painless transition to the new version of software.

Microsoft Word

Make Keyboard Shortcuts Work for You

The first question that comes to mind when navigating in an Office 2007 application is, where's the classic mode? Unfortunately, there is no classic mode. Yes, there are third-party add-ins¹ out there that can be used to reinstate a classic look-alike, but imagine having to train and support the classic mode as well as the common features located on the Ribbon (a graphical device that organizes commands into a set of tabs). You would have to do double duty, and your users would probably ask you why Microsoft made Office 2007 so complicated.

Instead, be reassured that many of the Word keyboard shortcuts still exist in the 2007 version. While you learn to navigate the Ribbon, try out a legacy keyboard shortcut, such as Alt+T, A (Tools, AutoCorrect Options in Word 2003) to reach the AutoCorrect dialog box. It will feel like a breeze compared to the laborious four clicks it takes to get there manually: Office Button, Word Options, Proofing, AutoCorrect Options. You can even press the Alt key to preview the KeyTips available in order to access current Office Button and Ribbon commands.

Building Blocks

The building blocks feature is the big sister to AutoText, offering advanced selection, capture and reuse functionality, plus a whole lot more. To create a simple building block, select existing text, press Alt+F3, name the building block and click OK. To recall the building block, type the name of the building block and press F3 to insert it into the document. You'll find building blocks interspersed throughout several Ribbons in 11 different galleries. The gallery name defines the type of building block including Bibliographies, Quick Parts, Cover Pages, Tables, Headers, Footers, Table of Contents and more. If you've used AutoText in previous versions of Word, you'll enjoy the expanded capabilities of this feature. When creating the building block, you can also take advantage of another helpful option, which is the ability to predefine where the building block is inserted in the document (footer, header or cover page). Place your insertion point anywhere in the document, and the building block is inserted at the cursor position.

Apply Styles Task Pane

Word 2007 now offers you more than a dozen different ways to apply and modify styles. One of the most efficient is to use the Apply Styles task pane. To open the task pane, press Ctrl+Shift+S, and the small, unobtrusive task pane displays with the style name selected. Begin typing the style name, and, if the AutoComplete Style Names option is checked, as soon as the complete style name appears, press Enter or click Apply. Alternatively, you can select the style from the drop-down list. From this task pane, you can also quickly access the Modify Styles dialog box or launch the Styles task pane for more options.

Applying Styles Without Inadvertently Creating New Character Styles

In previous versions of Word, if you selected text within a paragraph and applied a paragraph style, this automatically created a character style with the same name as the paragraph style. In Word 2007, the same behavior holds true only when applying a linked style (a style containing both paragraph and character formats). Fortunately, you can now disable this action by opening the Styles task pane (Alt+Ctrl+Shift+S) and selecting the Disable Linked Styles check box. After enabling this option, you can select text, even across multiple paragraphs, apply a linked style, and the style is applied to all paragraphs selected. Character styles are no longer inadvertently created when this option is enabled.

Outlook

Attachment Preview

Click on the file attachment in the Reading Pane to view a file without opening it. This is a real timesaver when you think about how long it would normally take to launch your document management system, open Word and then display the document. The file previewers that come with the 2007 Microsoft Office system allow you to preview Outlook 2007 items, Word 2007 documents, PowerPoint 2007 presentations, Excel 2007 worksheets, Visio 2007 drawings, as well as some images and text files.

Calendar Overlays

This feature will be a lifesaver for the busy legal secretary who manages several attorneys' calendars. Display the calendar and from the View menu, select View in Overlay Mode. The end result is a single calendar with color-coded appointments.

Share a Calendar at a Glance

Outlook 2007 lets you send someone with whom you are trying to schedule an appointment a snapshot of your calendar for the next week or two showing your free and busy time slots. In the Navigation Pane, select Send a Calendar via E-mail, choose the span of time you wish to send, and the selected dates appear in a new e-mail message. The message and calendar are embedded in HTML format into the body of the e-mail message. The calendar snapshot received is static and will not update when new appointments are added; however, it's a very useful feature.

To Do Bar

On the right-hand side of the Outlook window appears a To Do bar containing an integrated calendar, task list and Outlook items for follow-up. You can expand and even collapse the To Do bar so it doesn't encroach on the space available.

Electronic Business Cards

This feature makes it possible to design and send attractive business cards with the information, look and layout you want to display. Create a contact or open an existing contact, select Business Card in the Options group on the Contact Ribbon and then change the layout, add a picture, create a new label or choose from existing fields. As an added benefit, secretaries supporting multiple attorneys can color code each attorney contact for better organization.

RSS Manager

Outlook now allows you to subscribe to RSS feeds on the Internet and have new content delivered to your Inbox. This eliminates the time and energy it takes to surf and then sift through Web content. Subscribe to sites related to your profession, network and cable news or even technology sites.

Excel

Nearly Limitless Excel

While Excel has always been a superior product for number crunching, data analysis and presentation, it has had its limitations with regard to how much data could be placed in a single worksheet and how much formatting could be applied. Excel 2007 shatters these limitations. For instance, in Excel 2003, you could have a maximum of 65,536 rows and 256 columns. In Excel 2007, the maximum number of rows per worksheet is 1,048,576 and 16,384 columns. Now that's a lot of data. You also can

apply 4.3 billion colors (instead of 56), 10,000 AutoFilter items (previously 1,000), and 64 nested formulas (instead of just seven). These are just a few of the increased capabilities of Excel 2007.

Resizable Formula Bar

In earlier versions of Excel, when a cell's contents were longer than a formula or sentence, the formula bar would expand and often cover up much of the actual worksheet. Excel 2007 now includes a resizable formula bar. Expand or collapse it with the simple click of a button.

Table Tools for Designated Tables

One of the biggest improvements in Excel is how tables are handled. Once you define the worksheet as a table (Insert tab, Table), you have a host of tools and functionality at your fingertips. AutoFilter is automatically applied, and, if the list has a header row, it is automatically repeated when you scroll down through your data. A Design Ribbon for Table Tools is available for formatting and structure requirements.

Table Styles and Themes

Table styles and themes can be applied and even previewed with your own data by hovering over the applicable Table Style group (Table Tools: Design tab when a table is active). This makes formatting just as easy, if not easier, to accomplish in Excel as it is in Word.

Redesigned Pivot Tables

Pivot Tables are powerful tools, and we're happy to report Excel 2007 still has this functionality, and it is improved over previous versions. Instead of a Pivot Table and Pivot Chart toolbar, changes are made in a task pane. Drag-and-drop fields into different pivot positions, or click the corresponding check box.

PowerPoint

Reset Layout

Aside from adding bullet-point emphasis to your presentation, PowerPoint is all about working with graphics and illustrations to paint a picture for your audience. As you tweak and adjust the layout of your slide content, you can click Reset in the Slides group on the Home tab to bring the layout of the slide back to the original position.

Custom Slide Layout

If you find that you want to change a number of slides to a particular similar layout, you no longer have to make those changes manually to each slide. You can create custom slide masters that can be used whenever needed. Click the View tab, select Slide Master from the Presentation Views group. Select Insert Placeholder from the Master Layout group and choose from Content, Text, Picture, Media and other options. You can even rename the slide for easy insertion later. When you create your presentation and want to insert a custom slide, click Layout from the Slides group and select the layout you created.

Presenter View

If you have two monitors to use for your slide show presentation, you can take advantage of the Presenter view option. One monitor displays what the audience sees, and the Presenter view displays a separate window for the presentation, notes and narrator tools. This simplifies the process for the presenter and ultimately makes it a pleasant and seamless experience for the audience. To take a look at this exciting and easy-to-use tool, click the Slide Show tab, and, in the Monitors group, select Use Presenter View.

Tips for a Better Migration

The more pre-rollout planning an IT department does, the easier time users will have adjusting to the new workstation environment. For example, before the rollout, you can turn off the features that are not applicable to your organization, and you can customize things like building blocks, heading styles and margins. You can also set up templates to aid the users.

Make Tools Available

If you know where a command is in 2003 and are not yet familiar with where it is located in 2007, you can download interactive guides (*The Interactive Word, Excel and PowerPoint 2007 Command Reference Guides*) for Word, Excel, and PowerPoint that cover the most popular commands used in the 2003 versions. After downloading the guides from the Microsoft website, launch the executable for the desired application. Click the menu or toolbar command on the 2003 interface, and a window containing the 2007 interface displays graphically the 2007 equivalent commands in corresponding order. This is a handy tool for getting started when navigating the new 2007 user interface.

Using the Viewers

You can read, copy, and print Word 2007, PowerPoint 2007 and Visio 2007 files without installing the individual application by downloading the viewers from the Microsoft website. Unfortunately, for Excel 2007 files, you would first need to install the Compatibility Pack and then download the Excel Viewer 2003. See the compatibility section of this article for more information on the Compatibility Pack.

Customize the Quick Access Toolbar

There are only two toolbars in Word: the mini toolbar, which appears when text is selected in a document, and the Quick Access toolbar, which appears by default at the top of the window. This toolbar can be moved below the Ribbon for convenience. To help your users work more productively, the toolbar can also be customized to include the buttons and commands they use most frequently.

Compatibility

At the top of the list of challenges in working with Office 2007 is compatibility. Because you are probably already receiving Office 2007 files, you may already be aware of the compatibility issues when working in earlier versions of Office. And, of course, the Compatibility Pack is only available for Office 2000-2003, so there is no solution currently available if you are running Office 97.

Compatibility is a big challenge because it has essentially turned out to be a trial-and-error process. For example, even though you may be able to open and edit a Word 2007 file in Word 2003, you may easily run into something you cannot edit. Even worse, you may be able to edit a file, but when you send it back to the recipient with whom you are collaborating, it doesn't display as expected. What is happening here is the Compatibility Pack is trying to convert the file as best it can; however, the results are not predictable or consistent, and it's not always 100 percent seamless.

Needless to say, the collaboration efforts between firm and client require even more file exchanges, and the unintended changes made to these files during the conversion process can cause a lot of frustration. This is a concern especially for the late-night lawyer who doesn't want

to be bothered with the reasons the file doesn't exchange well, but just wants uninterrupted, seamless file exchange.

Your best solution would be to provide several workstations with Office 2007 installed throughout the office, and use these workstations (or Citrix) to edit a 2007 file in order to maintain the native file format without conversion. And as a stop-gap measure, add the Compatibility Checker to the Quick Access toolbar to see what will be affected when working in Compatibility mode.

More Challenges

We could write another complete article describing how to replicate known problems and reported bugs (several found in Microsoft's knowledge base articles and others found in the various Office 2007 newsgroups in addition to what we've found when teaching our Master Series course). However, we believe that most of these issues will be resolved with subsequent service pack releases of Office 2007. Any firm rolling out Office 2007 will need to study the known problems and bugs and then integrate solutions and possible workarounds into their training and support plan. Those who are waiting for the service pack releases before rollout may be able to focus attention on all of the great new and improved features in Office 2007.

Recommended Strategies for Deployment and Challenges

The greatest challenge in planning an Office 2007 rollout is to remember that this migration is not just a simple upgrade. There are many items associated with the planning process that must be taken into consideration. The following checklist will help get you started:

Consider rolling out the Compatibility Pack right away. The Compatibility Pack is a Microsoft download that allows the Office 2000-2003 user to open, edit and save Office 2007 files.

Study the Office 2007 features that are not compatible with your present version of Office. Plan how to handle collaboration with clients and other external sources before sharing files with an Office 2007 user.

Create a Design Flowchart for how to treat incoming and outgoing documents in Office 2007 format. If applicable, set up workstations dedicated to working on files in this format.

Allow ample time in order to plan for the rollout. Firms with multiple offices and languages should consider a nine-month to one-year plan for their efforts.

Study the minimum hardware and software requirements, and plan on raising the requirements higher for best results.

Work with third-party vendors to create a timeline of integration with Office 2007.

Test new releases of vendor add-ins with Office 2007.

Purchase or create templates that take advantage of the new functionality offered with Office 2007. This may require training to get up-to-speed with the new content controls available in Office 2007.

Get high-level training for in-house trainers and user support personnel.

Plan for instructor-led, end-user training.

Plan for floor support resources for three to five days post-rollout.

Office 2007 offers many benefits over previous versions, and some of the highlights are noted herein. There are issues to consider, however, when moving to the new software. It's fair to say that this version is very different from its predecessors, and as such, the conversion will be more complex. At the top of the list of complexities to address is compatibility. Just because this is a Word-to-Word or Office-to-Office conversion doesn't mean that it should be taken lightly. There are new file formats, new functionality and new features that are not backward-compatible. This upgrade takes planning, preparation and some good

old-fashioned sweat to pull off. However, with the proper planning, a solid conversion plan and a team effort between firms and their trusted vendors, the result is definitely worthwhile.

¹ Classic Menu for Office 2007 v3.5 is one of the add-ins you can purchase to bring back menus in Office 2007; however, there are imitations to what you can do with this tool. (www.addintools.com/english/menuoffice/default.htm)

by Sherry Kappel of Microsystems

::2007 and Beyond The Future of Legal Documents

Twenty years in the making, electronic legal document production enters a brand new era. Unlike the previous two decades, the next 10 years will see a development in technology that focuses less on the task of producing a document and more on supporting the business needs of lawyers. As one IT director proclaimed, "We do deals, not documents."

While client demands have accelerated the pace of legal business, legal document production technology has done little more than digitize and automate the functions of the typewriter, with the added ability to "copy/cut and paste." The result has been a business/technology gap that creates a challenge for law firms to provide the service clients require and deserve.

To close this gap, law firms must reorient the production of document deliverables to help each and every practice area meet its unique business needs. This article presents a vision for the future of legal documents and practical steps for bridging the business/technology gap.

The first step is to understand the growing business challenges that threaten to continue outpacing document technology. These include the following:



Changing business models. As client demands evolve and become more complex — from mandating faster deal and pleading turnaround times to fixed fees — legal document production must support ever-changing business models. *Example:* A large corporate practice was informed by one of its most important banking clients that the firm had to cut its fees by 50 percent. To meet the client's request, while maintaining strong margins, deal document turnaround time needed to be reduced dramatically.

More competitive business development. Legal business development is growing up from the marketing silo and out to lawyers, and even firm partners, to increase firm competitiveness. *Example:* While driving to a prospective client meeting, two senior partners of an AmLaw 200 firm discovered the proposal produced by the firm's marketing department contained information and firm experience that did not correspond to the prospective client's business. The partners were forced to rip out all of the pages containing the unrelated content. Since this incident, the firm mandated proposal generation capabilities that were not only fast, but also produced proposals of the highest quality.

Burden of risk. With clients requiring tighter and tighter risk management, law firm general counsel have never been more concerned

with document workflows. *Example:* A real estate practice previously used legacy leases as a starting point for each new lease, and then used “find and replace” functionality to update the client name throughout the document. The firm experienced an embarrassing moment when this workflow failed to remove “NV” from the document, erroneously leaving that designation at the end of the client name throughout the newly created lease. Granular content controls became an imperative to ensure that documents always contained the right content.

Globalized and localized. The increasingly global practice of law means firms must often deal with complex language requirements. Lawyers must often produce completely localized documents to compete effectively. *Example:* A global law firm needed to reduce the time its IT department spent maintaining and localizing legacy correspondence and other master documents in three languages.

Succession and retention. To meet profit growth targets and client service commitments as senior rainmakers retire, firms must transfer their priceless intellectual property to the new generation of associates by making it readily available within document workflows. *Example:* Facing an influx of new business, the leadership of a large European law firm faced a crucial decision: whether to hire an additional 100 lawyers and 200 support personnel or expand the firm’s existing capacity by improving productivity. The firm chose to enhance productivity, with a primary focus on empowering less experienced lawyers with best-practice content to enable faster document drafting.

Closing the Gap with Transformative Technologies

In the post-typewriter era, legal technology boomed with investments in vital systems, from technologies to manage cases, documents, knowledge and customer relationships to infrastructure that provides networking and remote connectivity. However, because they are often disconnected from the everyday workflows for producing legal work product, these legal technologies deliver limited value.

While undoubtedly the organizational design of a law firm hampers the ability to properly bridge the business/technology gap, the barriers of the technology have kept firms from going the distance. Three transformative technologies have recently matured and will enable firms to close this gap once and for all:

Fluent interface design. In this software design philosophy, user interfaces are reoriented to adeptly guide the user to meet the business objective at hand.

XML. Open file formats permit content and formatting to reorient based on the current context. They also make document content more stable, manageable, dynamic and reusable.

Connectivity. With open standards, firms can move rapidly from the black hole of most enterprise data stores to platforms seamlessly promoting safe and secure electronic collaboration arenas. Such connections not only enable document collaboration, but also global human collaboration.

Visionary firms must capitalize on these technologies in order to span the business/technology gap, and the 2007 Microsoft Office system presents an unprecedented opportunity.

Interface Reorients

Consider a “simple” authoring technology like Word installed on 450 million desktops worldwide. It takes 297 clicks (33 clicks for each of 9 levels) to properly modify Microsoft’s distributed numbering default into an outline usable in a typical legal agreement. This is simple?

Fluent interface — the pivotal *tabula rasa* moment. Data collected from 1.3 billion user sessions show that most Office features designed to promote viable electronic work product have gone underutilized. Hidden beneath myriad dialog boxes, drop-down menus and click points, basic legal document functionality is challenging to train and to retain.

Utilizing fluent interface design technologies and techniques is like beginning with a blank slate. By minimizing the number of clicks required to complete common document production tasks, the business user can move toward a results-oriented focus. With an ability to “train” the interface more easily than the user, firm resources must reorient as well.

Mind the gap — map business requirements to opportunities. This rapidly developing best practice increasingly rests with the legal business analyst. Acting as a liaison between practice areas and IT, the business analyst ensures that document production technology supports the business objectives of each practice.

Throughout the United States, Canada and the United Kingdom, legal IT visionaries are putting such analysts in place to align technology capabilities with business requirements. A regional firm in Seattle retitled and refocused its entire technology training team as senior business analysts. In New York, a capital markets firm dispatched a business analyst to aid its administrative staff in the adoption and deployment of a challenging matter-centric system. In Chicago, a mid-size firm began the design of its next desktop, not by migrating software, but rather by sending its lead technical trainers to an extensive business analyst training course. And, at a global U.K. firm, adept interviewing of business users on document production challenges revealed critical requirements now being implemented into the design of a “globalized and localized” Office 2007 desktop.

This mirrors a trend in the wider IT community. A *Network World* article, “Five Cool Future IT Positions,” lists the “technology-business relationship manager” among its five top IT role formations. Reporting directly to the CIO, technology-business relationship managers may have desks both in IT and in the business unit. This technology- and human-savvy consultant is embedded within the business unit to ensure progress and, more importantly, to bring about true business innovations.

XML Works

What if you could generate not just one but every document needed to execute a deal from a wireless device that fits in the palm of your hand? Imagine your practice area’s business development capabilities when you not only advise your potential client of this ability, but also complete the effort while in your first face-to-face meeting. Why not generate a free first draft to illustrate the depth of commitment your firm has made to the delivery of accurate, secure and managed legal content to meet their demands?

XML opens documents. Less than a decade after its original definition, XML has come of age to transform everything from the Web to the corporate intranets and client portals now administered directly by a lawyer's support staff. Microsoft created the Office Open XML format to bring documents up to speed with Internet-era open standards and to provide critical backward compatibility with legacy Office documents. Unlike the proprietary, binary-based file formats of past Microsoft Office releases, Office XML documents are more open, compact and robust, making document content more manageable than ever before. Office XML formats also enable new levels of data integration between documents and back-end systems. By using XML to open the Office file format, Microsoft has made it possible for firms to maximize interoperability within their document production environment. And the componentized nature of Office XML files means that document stability and issue resolution are greatly improved.

Closed, proprietary formats fade away. Since law firms began moving from typewriters to proprietary electronic word-processing systems in the early 1970s, baby-boomer professionals have had to deal with the problems associated with proprietary file formats, ceaseless conversions and corruption. For nearly 30 years, this recurring cycle spun one binary file type into another, wreaking havoc on content and formatting. The cycle remained unquestioned until the promise of the World Wide Web and prevalence of electronic e-mail systems brought the problem into focus: Why should Office file formats be proprietary? Shouldn't they too be as accessible, structured and open as content readable on the Web?

As the future of document formats unfolds, innovative approaches place complex document automation within the reach of business users. The "programmers only" technology barrier is removed, introducing true application agility to meet the business demands ahead.

Connectivity Extends

While most document production systems are designed around isolated applications, the legal world is now fully networked. Every law firm, regardless of size or available resources, is now empowered to apply previously limited technology concepts to compete for any client's business.

Boundaries blur, collaboration occurs. Consider that a simple search conducted from a browser page now delivers data formerly trapped in disparate enterprise business systems, from managed documents to billing systems to vetted legal-clause libraries. As technologies improve the internal research and productivity of the lawyer, time and distance remain the illusive "last mile" to closing the business/technology gap.

Some law firms are exploring new, more competitive business models to provide clients with lower-cost, self-service capabilities for creating document first drafts via the Web. These include new online client collaboration models such as automating first drafting via an authenticated portal and collaborative authoring via peer-to-peer networks. These new models of delivering legal services are especially important for price sensitive or fixed-fee legal services and for practice areas serving emerging ventures.

Connect and flatten your world. These global connectivity capabilities are certain to make CIOs, IT staff, general counsels and risk managers nervous, for they know increased connectivity equals increased exposure to risk. The single most important best practice for connecting and flattening your firm's universe is for business analysts to add risk managers to their teams. As business analysts map out business requirements and opportunities for making key data available at a lawyer's fingertips, risk managers will ensure that both firm and client risk requirements are met.

Most CIOs are probably already well aware of rising risk management requirements. For example, the content in engagement letters must be managed for consistency with the latest *Sarbanes-Oxley* and IRS disclosure language: "File/save as" document creation simply exposes firms to too much risk. By centralizing and controlling required content fragments, we can ensure compliance in a verifiable way.

Reorient Document Production Now

This discussion of the future of legal documents is clearly just the tip of the iceberg that will emerge over the next decade. Beginning today, business analysts should work with their most strategic practices to:

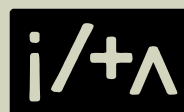
Map business requirements to technology opportunities. Bridge the critical business/technology gap by mapping business requirements to the opportunities presented by fluent interface design, XML and wider connectivity. Brief IT leadership on the requirements for increasing practice-area competitiveness and the resources needed to close this gap, such as knowledge management associates and risk managers.

Manage live, modular document content. Recruit knowledge management associates as part of your team for each practice area. Use XML to capture the best-practice content of your senior partners, and share this priceless knowledge firmwide with new associates.

Connect and flatten your world. Work with risk managers to map connections to business-critical data and to connect lawyers with clients using collaboration technology in compliance with risk management requirements.

A Need to Commit

Simply put, the future of legal documents requires a relentless dedication to understanding the business needs of every practice area and meeting those needs with agile document production capabilities. Only by achieving both of these objectives does a firm bridge the business/technology gap.



**International Legal
Technology Association**



by Martin Grasdal and Elliott Ichimura of Microsoft Corporation

:: Secure Collaboration for Law Firms

A central concern for law firms is defining and establishing a cost-effective balance between ease of collaboration and information security. Rapid growth in the volume of digital content and its diversity of formats makes it increasingly difficult for organizations to maintain control over the confidentiality, integrity and availability of information, raising risks of litigation and damage to a firm's reputation. As more efficient content-authoring tools and greater access to information drive content growth, they also raise client expectations for attorney productivity. These client expectations only continue to rise as the Internet breaks down geographic boundaries, giving clients a wider range of choices for legal advice and stoking competition among firms.

Effectively managing, conveying and securing information is therefore essential to both the firm's ability to compete and to maintain its reputation in the marketplace. Unfortunately, enhanced information security and privacy compliance are often perceived to be at odds with the imperative to deliver well-informed advice, both faster and at a lower cost. Technological controls that enforce policy compliance often require changes to habitual collaboration methods and disruptions in established information flows. Moreover, improved security and compliance tend to increase operating costs at a time when law firms must also be concerned with improving profits per partner to attract the outstanding legal talent necessary to meet client needs.

Faced with what appear to be competing objectives, the challenge and opportunity for law firms is to carve out a third path by driving adoption of more secure information sharing and collaboration methods that deliver improved operational efficiencies, better risk mitigation and more convenient or even distinctive service experiences for clients. Areas of vulnerability include ineffective or inefficient tools and practices in the following areas:

Enterprise content management and search capability

Workflow automation

Integrated collaboration tools and platforms

Mobility solutions for remote workers

Solutions for Enhanced Collaboration and Security

An important goal of Microsoft technologies and products is to provide as much security and compliance as possible without sacrificing usability, productivity and the flow of knowledge. Microsoft has increased the depth and breadth of security, collaboration and management products and technologies through the introduction of new and improved products. These include Windows Vista, Forefront security product family, System Center product family, Exchange 2007, 2007 Office system, Groove 2007, Identity Lifecycle Manager 2007, SoftGrid and others.

Enabling Decentralized Collaboration/Communication

Law firms have an increasingly mobile workforce with intense communication and collaboration needs. The technologies that employees rely on for communication and collaboration need to be able to support complex collaboration scenarios that go beyond simple sharing of ideas and involve content creation, editing, document distribution, review, approval, task management and reporting. These technologies need to be easy to use and allow employees to spend more time on their core competencies, rather than on time-consuming searches for expertise and information, clerical tasks or manual procedures. Furthermore, mobility should not be a barrier to effective communication and collaboration: attorneys should be able to experience near onsite levels of service and be able to collaborate with others while at a client site, in court or otherwise disconnected from the firm's network.

Providing Efficient/Secure Matter-Centric Workspaces

Depending on the context and situation, certain forms of collaboration may not be well-suited to the requirements of law firms. The use of e-mail for collaboration can be inefficient and lead to elevated levels of risk. For example, keeping track of authoritative document versions among complex discussion threads with many participants and attachments can negatively affect productivity and lead to loss of data integrity. Risk to data confidentiality is also high because e-mail is often sent unencrypted. Despite its shortcomings, e-mail is, more often than not, the *de facto* collaboration tool of choice. It is convenient, familiar, easy to use and available. Further, e-mail applications provide a means to store content locally, making e-mail useful for offline collaboration.

While e-mail will always be an important tool for collaboration, its use as a primary means of collaboration often needs to be minimized and limited to relevant contexts. This then requires that collaborative solutions providing a better alternative to e-mail be made available. Microsoft Office SharePoint Server 2007 workspaces and team sites provide common areas where teams can collaborate efficiently and where technological controls can more effectively enforce business processes and rules governing the flow and security of information.

Improving User Acceptance and Productivity

Integration of SharePoint with Microsoft Office 2007 applications is intended to foster high user acceptance. Team members can interact directly with SharePoint sites and workspaces using the productivity applications with which they are already familiar, allowing them to be productive right away.

Integration with Outlook 2007 provides the ability to use Outlook to view calendars and contact lists stored on SharePoint sites and create and manage sites for editing documents and organizing meetings. The enhanced and customizable enterprise search capabilities of SharePoint make it easy to find information and people with relevant expertise, allowing workers to spend less time engaged in inefficient searches. Integration with line-of-business applications via the Business Data Catalog (BDC) makes it easy to find information stored in third-party enterprise application systems.

Increasing Information Security

SharePoint workspaces and sites increase information security and minimize risk in a number of ways. These include:

Flexible permissions provide tighter and more granular control, ensuring users can handle or view only the information to which they have access.

Information integrity is facilitated by document check in/check out, automatic major and minor document version numbering and tracking, auditing and workflows.

Audience targeting features automatically adjust the user interface display so users are unaware of information they do not have the authorization to view. Likewise, security trimming of search results helps ensure that users do not see references to information they do not have authorization to view.

Excel services make it possible to display and share spreadsheets more securely in a browser and maintain tight control over the integrity of data and the confidentiality of the underlying formulas and business logic.

Integration of SharePoint with Rights Management Services helps ensure persistent protection of information that is downloaded from SharePoint sites.

Forefront Security for SharePoint protects the collaboration environment by integrating multiple antivirus engines from leading antivirus vendors and content controls. Furthermore, through administrator-defined policies, it can scan documents to ensure compliance with confidentiality and language usage policies.

Enhancing Compliance with Regulations/Business Rules

Customizable and automated workflows that support review and approval processes help ensure appropriate data is made available to the right people at the right time. Customizable and transparently applied information policies help to ensure content is managed according to business rules for access and retention. The Records Center Site Template provides an enterprise records management solution out-of-the-box that helps ensure the proper disposition of formal records according to business rules, regulations and client requirements.

The document information panel in Microsoft Office 2007 applications such as Word or Excel displays important information from the metadata columns associated with a document and defined by SharePoint services, such as workflow status, content deadline and other information. The information panel can be customized with the rich capabilities of an InfoPath form, including external data connections, data validation, conditional formatting, business logic and other controls.

Enabling Mobile Worker Productivity

Mobile device support provides the ability to render SharePoint site, team workspaces, lists and forms on mobile devices using a simplified format. Users can download, view and edit Microsoft Office files and blog to SharePoint sites by using their mobile devices. Through Office Outlook Mobile, users can access calendars, tasks, contacts, discussions and documents.

Outlook cached mode makes it possible to have access to personal e-mail, tasks, calendar and contacts while offline. Outlook integration with SharePoint expands on this functionality by making it possible to synchronize with items from SharePoint lists, such as document libraries, contacts, tasks and calendars. While offline, mobile workers can work on local copies of all these from SharePoint sites. When the users connect, they can resynchronize the local content with the SharePoint content. The applications are responsible for resolving conflicts created when more than one user edits a document at the same time. However, users can also check out documents before working on them offline to prevent conflicts.

Accelerating Communication

Real-time presence indicators provide a visual notification of whether an individual is online and available for a telephone or audio conference call, instant messaging, e-mail, Live Meeting session, two-way video conversation or other activity. Integration with Office Communications Server 2007 can extend presence indicators to users of public instant messaging services, as well as users in other organizations that have deployed Office Communications Server 2007.

Enhancing Security of Remote Access

To be productive, remote workers need nearly on-site levels of service from an organization's internal systems. Typically, this is accomplished by providing traditional VPN access. However, traditional VPN access can be problematic. For example, many VPN solutions violate the security principle of least privilege by providing access to the entire internal network from uncontrolled end points (VPN clients). This causes high levels of risk from VPN clients that may be infected with malware or from devices that have been compromised. Further, using traditional VPN protocols from behind firewalls and routers in hotels and other locations is not always possible.

Two solutions, Internet Security and Acceleration (ISA) Server 2006 and Intelligent Application Gateway (IAG) 2007, provide efficient and more secure access for remote workers. Both help address the shortcomings of traditional VPN solutions for remote access.

ISA Server 2006 is an enterprise-grade network firewall and application-layer inspection gateway that provides for strong inbound and outbound access control, logging and reporting. ISA Server 2006 also integrates an application-layer firewall, proxy server and VPN server to provide a robust and cost-effective solution.

In situations where traditional VPN access is acceptable and required, ISA Server 2006 provides a number of benefits:

The VPN quarantine feature of ISA allows end-point checking of clients. This means VPN clients are not allowed access to the internal network until they have passed compliance checks.

All traffic from the VPN clients can be filtered according to business and security rules to help ensure compliance with the principle of least privilege.

Where remote access to Web applications such as Outlook Web Access (OWA) and SharePoint is necessary, ISA provides more efficient and secure access. For example, ISA Server is able to inspect the internal details of the Web traffic, even when it is encrypted, to provide greater security and control over inbound traffic.

ISA Server provides single sign-on capabilities for Web applications, removing the need to log in multiple times to connect to different Web applications behind the firewall.

ISA Server provides mechanisms for automatically translating internal and private Web links to make them available for external users and to hide internal details, such as internal Web server names.

Intelligent Application Gateway (IAG) 2007 provides an SSL VPN solution to access internal resources. One of the key advantages of an SSL VPN solution is that it uses Web protocols to provide access to internal Web and non-Web-based resources. This increases the availability of internal services to remote workers who may be working behind firewalls or routers in hotels and client networks that do not allow traditional VPN protocols.

Like the ISA Server VPN quarantine feature, IAG 2007 also provides a compliance check of end points before allowing connectivity. However, it takes compliance checking a step further in its granularity and

flexibility. For example, it determines what type of access should be granted to a particular service, depending on conditional rules. It is possible to prevent uploading of and collaboration (updating and editing) on documents from an untrusted end point, such as an airport kiosk but allow the ability to have a read-only view of documents in a browser. Like ISA Server, IAG hides internal network names and details and provides single sign-on. Additionally, it is possible for users to manage their passwords through the IAG portal. Other security features of IAG include the Attachment Wiper and the cache cleaner to help ensure removal of sensitive data when the SSL-VPN session ends.

Enabling Client Collaboration for Enhanced Service Delivery

One of the major sources of pain for firms and their clients is client access to information stored on firm systems. Clients want information related to a matter or engagement to be seamlessly and easily available from within their own networks. Office SharePoint Server 2007 can help provide a better client experience. When combining Active Directory Federated Services (ADFS) with the extranet functionality of SharePoint, clients can connect to the firm's extranet site using single sign-on.

When clients connect to the firm's extranet, audience targeting for content ensures that the clients see a "sanitized" view of information that is appropriate for them. Extranet clients experience the same rich collaborative functionality of SharePoint that internal users enjoy. Workflows to ensure accurate review and approval processes and to ensure scheduled delivery can be initiated on the extranet site by either clients or firm employees. InfoPath forms services make it easy to deliver rich, Web-based forms to extranet users without the need to deploy client components. Consequently, it is possible to collect and track survey and other data from clients without the need for an InfoPath client application.

Additional benefits of enhanced extranet functionality of SharePoint include the ability of extranet sites to support multiple methods of authentication. Internal users can use their Windows login identity to seamlessly access the extranet site, while clients can use a different authentication method, such as Windows CardSpace.¹

To facilitate interorganization collaboration, firms can also take advantage of the Web-conferencing capabilities of Live Meeting 2007 or Office Communications Server 2007. With Live Meeting, colleagues, partners and clients can collaborate online in real time. Integration with Office 2007 allows Live Meeting sessions to be initiated from within Office applications. Furthermore, Live Meeting 2007 provides the ability to share applications in real time between meeting participants.

Enabling Controls to Enforce Business Processes

Collaboration often requires the complex orchestration of a number of related tasks, as various team members have to contribute to documents and activities in serial or in parallel for a particular project. Business rules codify standards for the orchestration of some of these activities by requiring reviews and approval for work product or new client intake. To ensure productivity and to mitigate data loss, it is important that the right information be made available to the right people at the appropriate time. This is especially important when the firm or its client may be subject to ethical or court-mandated

requirements regarding the availability and ability to audit content. Relevant features and capabilities of the 2007 Office system to enforce business process include workflows and auditing.

Workflows

Out of the box, a number of standard workflow templates are available in Microsoft Office SharePoint Services, making it easy for organizations to map business processes to automated workflows without having to write code. Making it possible for users to initiate their own review and approval processes helps reduce time spent managing documents through the document life cycle. Visibility into workflows is promoted by storing workflow information in user accessible lists, making it possible to see task assignments and status and to generate reports that provide performance metrics.

When custom workflows are necessary, SharePoint Designer makes it possible to create workflows that map to a more complex business process without writing code, for example, to apply a policy based on a conditional event. If more powerful custom solutions are necessary, Visual Studio 2005 Designer for Windows Workflow Foundation can be used to create workflow templates and custom workflow activities. It is also possible to create InfoPath forms for use with SharePoint workflows. This makes it possible for users to use workflow forms from within Office applications.

Auditing and Logging

Audit logs provide historical information on process execution and data access. Auditing is important when authentic records are required, for example, to establish ethics compliance or for legal discovery and litigation. SharePoint provides the ability to audit events on document libraries and sites, such as searches, user changes, content type changes and other events. Audit logs are stored in SharePoint content databases and are accessible via Excel spreadsheets.

While SharePoint provides server-side auditing of key events, such as document check-in and check-out, client-side tracking of document events, such as printing or saving different versions, can be accomplished by developing custom solutions or using information rights management technologies discussed under data protection below.

Organizations having strict auditing requirements to meet business and compliance needs will benefit from Systems Center Operations Manager (SCOM) 2007, which includes the Audit Collection Service (ACS). ACS provides a means for intelligently collecting and archiving audit records in a centralized and secured store for analysis and reporting. To increase the level of trust that can be placed in stored audit records, SCOM agents on monitored computers attempt to send audit events as quickly as possible to an audit collector. ACS capabilities can be extended with third-party solutions to provide assistance with managing logs and reporting for compliance and forensic requirements.

Enabling Data Protection/Enterprise Content Management

Because they are custodians of client data, law firms often need to ensure they also meet their clients' compliance, privacy and other requirements for data security and content management. Data encryption, combined with and supported by strong authentication and integrity controls, assists firms in safeguarding sensitive information. Microsoft provides a number of technologies to help protect information

stored in databases, computers, laptops, mobile devices and information transferred on computer networks or via e-mail. Encrypted File System (EFS) can encrypt data at the file or folder level to mitigate unauthorized access. With Windows XP and Windows Server 2003, it is possible to share EFS encrypted files among users. Windows Vista and Windows Server 2008 improve EFS by making it possible to store the keys used for EFS encryption on smart cards.

To further mitigate risk to data confidentiality, Windows Vista Enterprise and Ultimate provide encryption at the volume level, including the operating system files, through a feature known as Windows BitLocker drive encryption.

For persistent protection of documents throughout their lifetime, firms may also deploy Rights Management Services (RMS). RMS encrypts documents and provides access and usage controls to specify who can access documents, what they can do with them and how long those documents are accessible. Office 2007 applications and Windows Vista provide built-in support for RMS.

To mitigate risks arising from the loss of mobile devices, such as smart phones or PDAs, firms can benefit from the security features of Windows Mobile 6.0. These features include the ability to encrypt data stored on memory cards inserted into mobile devices; to issue "kill bits" remotely to wipe data from lost or stolen devices; to reset mobile devices and wipe data after a configurable number of failed attempts to unlock the device with a PIN; and to consume RMS-protected data.

To help protect data in transit and to provide server and domain isolation to address compliance and security requirements, firms can deploy IPSec, an encryption and network access technology.

To help protect e-mail in transit, Exchange and Outlook support e-mail encryption and e-mail signing (to ensure e-mail integrity and nonrepudiation). Exchange Hosted Services provides an "offsite" service for e-mail encryption, without requiring client software.

Policy-Driven Content and Records Management

Inefficient management of data, content and records is often a significant bottleneck to firm performance and service delivery. The predominance of manual processes and the lack of efficient and logical storage mechanisms and taxonomies, as well as the lack of automated technological controls to enforce policies for content storage and retrieval, add to employee workload and increase risk to the firm as a whole.

Office SharePoint Server 2007 offers significant improvements for records and content management over previous versions and incorporates and builds on the Enterprise Content Management (ECM) solution that was previously found in a separate product, Microsoft Content Management Server (MCMS). Many of the improvements result from the ability to automate a large number of tasks around content management, allowing organizations to apply and enforce business rules transparently. Improvements include the ability to:

Design and organize document libraries around administrative or logical structures rather than document types

Automate information classification and enforce expiration and retention policies based on document type

Associate workflows with specific documents

Declare content as official records and route it to the appropriate place in the records center, without requiring users to be aware of the underlying structure of the repository

Place legal holds on records and on documents during a legal discovery process, overriding retention policies

Send e-mail from Exchange Server 2007 managed folders to a SharePoint records center

Exchange Server 2007 provides a number of policy-based mechanisms for ensuring compliance and information protection. These include:

Ethical walls to provide a policy-based solution that enables organizations to control what content is allowed through the e-mail channel

Journaling and archiving to provide enhanced support for e-mail retention policies

Managed folders that enable compliance officers and administrators to create message retention groups to better organize and manage e-mail messages

Message classification to provide a means for flagging messages for special handling, such as “attorney-client privileged,” “client confidential” and others

Encryption, signing, and rights management support to help ensure that message confidentiality and integrity are maintained both inside the organization and over the Internet

Summary

Law firms recognize the need to develop and improve the essential communication and collaboration capabilities that support client service delivery processes. However, the need to ensure ethics compliance and improved information security can become a stumbling block that threatens to impose cost and slow collaboration. Designing and implementing cost-effective solutions that can meet or exceed security requirements without adversely affecting productivity or impeding the flow of information is a challenge that will long occupy law firms and their IT organizations.

Office SharePoint Server 2007, a core element of a more secure collaboration solution, provides robust and powerful security and compliance features, such as workflows, auditing, records center, versioning control and integration with Rights Management Services. At the same time, Office SharePoint 2007 provides improved collaboration, communication and enterprise content management functionality. Users can take full advantage of the SharePoint capabilities without leaving the familiar environment of Microsoft Office applications. Organizations can more fully realize the benefits of SharePoint by integrating it with other Microsoft products that enhance productivity, availability, and security. These include the Windows Server System; 2007 Office system; Exchange Server 2007; Windows Mobile 6.0; and the Forefront security products, such as Intelligent Application Gateway 2007 and Forefront Security for SharePoint, to increase client, server and edge security.

¹ Windows CardSpace is a new feature included with the .NET 3.0 Framework, Windows Vista, and Internet Explorer 7.0. It provides a simple and secure way to manage digital identity for use with external Web sites and services. Windows CardSpace includes a number of advanced security mechanisms, such as time stamps and encryption, to mitigate attempts to compromise identity.

For More Information

To learn more about the ways Microsoft can assist you in achieving your strategic goals for improved service delivery and practice profitability through more efficient and secure collaboration, please visit the Microsoft Professional Services Industry Solutions page at www.microsoft.com/professionalservices, read the more detailed companion white paper, Enabling Secure Collaboration for Professional Services Firms at www.microsoft.com/industry/professionalservices/businessvalue/secure_collaboration.mspix, contact your Microsoft sales representative or explore the following information on the products discussed in this article:

The Microsoft Professional Services page at www.microsoft.com/industry/professionalservices/default.mspix

The Infrastructure Optimization Model at www.microsoft.com/technet/infrastructure/default.mspix

The 2007 Office system product page at office.microsoft.com/en-us/products/FX100487411033.aspx?pid=CL100571081033

The SharePoint product page at www.microsoft.com/sharepoint/default.mspix

The Exchange Server product page at www.microsoft.com/exchange/default.mspix

The Live Communications Server 2005 product page at office.microsoft.com/en-us/communicationsserver/FX101729111033.aspx

The Groove product page at www.microsoft.com/groove

The Live Meeting product page at www.microsoft.com/livemeeting

The Forefront edge security page at www.microsoft.com/forefront/edgesecurity/default.mspix

The Forefront server security page at www.microsoft.com/forefront/serversecurity/default.mspix

The Forefront client security page at www.microsoft.com/forefront/clientsecurity/default.mspix

The System Center product page at www.microsoft.com/systemcenter/

The Windows Mobile product page at www.microsoft.com/windowsmobile/default.mspix

The Windows Server 2003 Rights Management Service page at www.microsoft.com/rms



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About the Authors

Martin Grasdal is an experienced authority in the area of network security. He has written a number of books and created other types of content (online and otherwise), including MCSE Planning and Maintaining a Windows Server 2003 Network Infrastructure: Self-Study Guide (Syngress), ISA Server 2000 SharePoint Pointer Server Deployment Kit and demo scripts for TechNet security presentations. Martin is a Certified Information Systems Security Professional (CISSP), and he has also held a number of technical positions in industry, including CTO/Director of Websites at Brainbuzz.com. He can be reached at v-mgrasd@microsoft.com.

Susan Horiuchi of PayneGroup leads her team of international trainers and project leads and travels to client sites around the world providing high-end technical training project management and consulting services. Susan is a contributing author of the “Word for Law Firms” and “Excel for Law Firms” book series published by PayneGroup, a contributing author to legal and technical publications and a speaker at legal and technical conferences. Prior to her tenure at PayneGroup, Susan had over 10 years of law firm experience as a legal assistant. Susan can be reached at susanoriuchi@payneconsulting.com.

Elliott Ichimura drives definition of Microsoft’s solution roadmap for the professional services industry, addressing the business needs of law firms, accountancies, consulting firms, system integrators and management services organizations. Before joining Microsoft, Elliott worked at Ernst & Young in roles spanning business strategy, operations and IT. He began with design and development of enterprise and business

applications for the firm and the tax practice. He then earned an MBA from the MIT Sloan School of Management and returned to the firm to lead various practice-oriented initiatives, many of which intersected with technology. He can be reached at eichimur@microsoft.com.

Sherry Kappel is Senior Vice President and Chief Innovation Officer at Microsystems. She plays an integral role in the design and delivery of Microsystems products and services and is a recognized expert on document production problems and solutions. She has 25 years of experience in authoring technologies and has developed best practices methodologies for binary conversions and document reuse around Word V6/95/97/2000/2002/2003 in use today by the world’s largest law firms and life sciences companies. Sherry has been a featured speaker at numerous ILTA events, from the annual conference to regional meetings and webinars. She can be reached at sherryk@microsystems.com.

Donna Payne, founder and president of PayneGroup, has authored 12 books. She is a member of Microsoft Legal Advisory Counsel, the American Bar Association, the American Society of Journalists and Authors and the Project Management Institute. In March 2004, during the American Bar Association’s annual TECHSHOW, she received the first ever *Lex Proficio* award for lifetime service advancement of legal software and publishing. Donna is considered a leading authority on document security, reducing the risk of metadata and other electronic discovery issues. She can be reached at donnapayne@payneconsulting.com.

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