Dedication

To the children who have blessed my life with joy,
opened my eyes and shown me the world,
and are always in my thoughts.
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**Preface**

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“Certainty? In this world nothing is certain but death and taxes.” Clearly, Benjamin Franklin said that before the creation of computers and computer software. Today, in addition to death and taxes, is the certainty that there will be a faster, better, and a more feature-rich version of your computer the day after you get it home and set up. Even more certain, the software installed on your computer will be upgraded, modified, revised, or in some way changed on a frequent, if irregular, basis. The problem for the users of the computer hardware and software is learning how to use the new features and “keeping current.”

For the legal team technology has changed the fundamental way in which law is practiced. The paper calendars and ledgers of law offices are being replaced with computerized calendaring systems with built-in alerts, computerized time record-keeping, and accounting packages. Paper communication has been replaced with electronic mail (e-mail), instant electronic messages (IM), and documents created electronically and sent as attachments to e-mails.

Legal teams in trial practices face new challenges with the rapid change from paper documents to electronically created documents. Traditional discovery of paper files has been replaced with production of electronic documents delivered in multiple electronic formats. The legal team today must learn new terminology, techniques, and methods founded more in engineering school than in law school or paralegal school. New members are joining the traditional legal team in the form of forensic consultants, information technologists, and computer experts. The modern legal team must have a sufficient understanding of the technology impacting the legal profession to know when to call in the outside experts, and then to be able to communicate with them. And, all members of the legal team must have an appreciation of how legal ethics and court rules are impacted by the technology changes.

In reality the problem is more basic than just learning about the newest features. The problem extends to remembering how to use features not regularly used. There are certain features you use all the time, like certain shortcut key combinations; for example, the control key and the letter C (CTRL+C) to copy a highlighted paragraph in a document and the CTRL+V to paste the copied paragraph into a new location. These features may be new discoveries for some people. The point is, when you use features every day you learn, know, and will remember them. But what about the features rarely used or never used before? How do you learn to use them? For example, in a word processing document you are asked to show the changes being made to the document. This is a feature called Track Changes in MS Word. You need to know how to find Help in using the feature without going back to school, calling a technical support office, or running down to the local bookstore to get a copy of a manual for the software program. Or, your office just got a new program (or an updated version of an existing program with added features and a few “bug fixes”): How do you become familiar with this program without going back to school, calling a technical support office, or running down to the local bookstore? . . . Right, same problem!
This book is intended to give you enough insight into the operations of software and hardware to understand the basic functions and an appreciation of the terminology to enable you to talk intelligently with the “technical” support people and to ask your “geek” friends the right questions. And more importantly, it is intended to provide a methodology to find the Help within the programs you use, and to learn about new programs and program features using learning resources from the software vendors.

The approach used in this book is to provide a basic introduction as a framework to build on the more advanced concepts. For example, understanding how a database works, such as the MS Access database, lays the foundation for more advanced uses of databases in calendaring, case management, and litigation support programs. Understanding the basics of spreadsheets helps in appreciating the features of accounting and time and billing software.

Author Biography

Thomas F. Goldman, JD, is Director of Graduate Legal and Technology Studies, School of Professional Studies at Thomas Edison State College where he has developed the Advanced Litigation Support and Technology Certificate Program, a member of the Paralegal Studies Program Advisory Board and a mentor. A Professor Emeritus of Bucks County Community College where he was a professor of Law and Management, former Director of the Center for Legal Studies and of the Paralegal Studies Program.

He is an author of textbooks in paralegal studies and technology, including the Paralegal Professional in its second edition, Accounting and Taxation for Paralegals, and Contemporary Civil Litigation.

An accounting and economics graduate of Boston University and of Temple University School of Law, Professor Goldman has an active international law, technology law, and litigation practice. He has worked extensively with paralegals and received the award of the Legal Support Staff Guild. He was elected the Legal Secretaries Association Boss of the Year for his contribution to cooperative education by encouraging the use of paralegals and legal assistants in law offices. He also received the Bucks County Community College Alumni Association Professional Achievement Award. He has been an educational consultant on technology to educational institutions and major corporations and a frequent speaker and lecturer on educational, legal, and technology issues. Appointed to the American Association for Paralegal Education Board of Directors in October 2005, he currently serves as the chair of the Technology Task Force, where he initiated the Train the Trainer program.
The book is divided into four units:

I. The Fundamentals
II. The Building Blocks
III. Specialty Applications Software
IV. Computer Applications in Litigation

**Unit One—The Fundamentals** will for some be a review of the concepts learned in computer courses. In this presentation, issues facing the legal team such as ethical concerns are presented. For the new paralegal, the information technologist, or the lawyer quickly trying to come up to speed with the use of technology and computers, this will present an overview and introduction to the use of computers and technology in the law office and corporate and government law departments.

**Unit Two—The Building Blocks** is designed to show the uses of law-related applications software that are the software building blocks on which all other specialty applications software is built: the database, the word processor, the spreadsheet, and computer search engines. The IT people reading this will tell me that that is an oversimplification and that there are other important components as well. But from over twenty-five years teaching, writing, and lecturing on this subject, I have found that with these conceptual building blocks in mind, students, paralegals, and lawyers have a better understanding about how to use the more complex software applications.

**Unit Three—Specialty Applications Software** offers an introduction to some of the classes of specialty applications software in use in the law office and the court system. Specialty applications software for the legal community is constantly evolving. What was once a field of single-application software programs, like stand-alone calendar programs, or single-purpose timekeeping programs, is now a marketplace of integrated programs performing some, most, or all of the automation needs of the law office.

**Unit Four—Computer Applications in Litigation** presents the ways in which technology is being used by the courts and by litigators. As one of the evolving areas of practice and court administration, it cannot be definitive. The unit attempts to demonstrate how the technology is being used and suggests how it may be used in the future.

Appropriate representative programs are presented, with a learning module for that software, demonstrating the use of the learning resources available to understand the program and to provide a resource for future use of the rarely used features. With an understanding of the use of the Help resources, it is hoped that the user will not need to go back to school, call a technical...
The following list describes the outcomes you should expect from completing the course or reading this book.

1. Explain the functions of the components of a computer system in the law office.
2. Describe the different classes of software and the functions they perform in a law office.
3. Understand the application of legal ethics in the use of technology.
4. Understand the impact of court rules on the use of software and trial practice.
5. Describe the features of the electronic courtroom and the paperless office.
6. Describe how a computer network is used by a law firm.
7. Explain the importance of maintaining computer and network security and the steps that may be taken to do so.
8. Understand the use of legal-specific applications programs.
9. Describe how the computer is used to conduct factual and legal research.
10. Know how to locate and use the resources for learning how to use specific software programs.
11. Understand how the courts use technology.
12. Be able to communicate with others in a support or user position about technology as it relates to the legal community.
CHAPTER DESIGN

Opening Scenarios

Each chapter contains a scenario designed to focus the reader on the relationship of the chapter content to law office practice. The scenarios follow the career of a fictional law office starting from scratch.

Learning Objectives

Chapter learning objectives are provided to set the stage for the learning experience and the outcomes desired upon completion of the chapter.

Chapter Coverage

Material covered in the book has been divided into chapters representing functional aspects of the use of the technology. The core programs found in other legal specialty applications software, including word processing, electronic spreadsheets, and databases, are covered from the view of the law office application and the specific features and applications commonly used in the legal environment.

Specialty applications software is divided into classifications and covered by class, including law office applications, case management, litigation support, and presentation graphics.

Emerging topics are covered in the use of the Internet, the paperless office, electronic courtroom, and electronic research.

Contemporary legal software programs are presented, where applicable, with an overview of the software and end-of-chapter exercises utilizing real-world software. Tutorial learning modules are provided for download from the companion website to ensure that the latest versions are covered and taught.

A primary learning objective of the end-of-chapter software exercises is to teach the user how to use the built-in Help features in software programs and to locate and use the training materials available from the software vendor, to learn new or rarely used features of the program, and to know when to call in outside assistance.

Practice Materials

End-of-chapter practice materials, continuing case studies, and a comprehensive case study are provided that reflect the actual information and documents frequently found in legal practice, using appropriate application software.
**Using the Related Software**

To prepare your computer for some of the software learning modules it will be necessary for you to have selected “plug-ins” and “viewers.” OK, so I started with the geek talk already. These and the other technical terms are explained in the text itself, and in the Frequently Asked Questions appendix (Appendix 2), and in the technical Glossary.

For some of the advanced software learning topics, you will need Microsoft Internet Explorer. To view the Webinars in certain software learning modules, you will need the Webex Player. To hear the sound files will require one of the sound programs, such as SoundRec, iTunes, MS Media Player, or similar program. Again, all of these will be explained in Appendix 2. You may want to take a moment to check your computer for these plug-ins and viewers and download them before starting the first chapter.

Lessons in the chapters on word processing, spreadsheets, databases, and presentation graphics require the user to have a copy of Microsoft Office to access the Microsoft Internet site. Microsoft makes available a “Test Drive” version of Office 2007 at http://www.microsoft.com/office/trial/default.mspx. Microsoft recommends this for broadband users only. When you log on to the Microsoft site it will check your computer for the needed plug-in. You may need to install the Test Drive browser plug-in.

**Instructor Resources**

**Instructor’s Manual**

The instructor’s manual, written by Thomas Goldman and Marissa Moran, contains sample syllabi, chapter outline and summary, WWW Mini Exercise results, answers to questions and exercises, and software teaching notes.

**Test Generator**

The Test Generator allows you to generate quizzes and tests composed of questions from the Test Item File, modify them, and add your own.

**Powerpoint Lecture Presentation**

The PowerPoint Lecture Presentation includes key concept screens and exhibits from the textbook.

- **Instructor’s Resource CD (IRCD)**
  
  This CD contains the Instructor's Manual, Test Generator, PowerPoint Lecture Presentation Package, and video scenarios to use in class.

**Student Resources**

**Companion Website: www.prenhall.com/goldman**

In the textbook, students will be directed to this website to see the latest tutorial updates and to link to new downloads of upgraded software. The website will be regularly updated with additional tutorials, applications, and case material. “ASK Professor G” will allow instructors to post questions to the author and receive online responses to technical and other questions.
**STUDENT DVD**

Packaged with the student text is a student DVD containing several of the software applications, tutorials, and case material needed to complete assignments in the text.

**EDUCATIONAL DEMONSTRATION SOFTWARE**

The DVD included with this text includes educational demonstration software from the following companies. These companies have graciously agreed to provide demonstration versions of their software for educational use with this text.

Each of these programs share common elements, they are leading programs used in law offices, government agencies, courts, and corporate legal departments. Each provides resources for learning and using the software in the form of extensive help features and learning tutorials.

The programs may be installed on personal portable, home, school, or work computers. Most have a timing feature that allows generally for 120 days of use to provide access for the entire semester, others limit the number of total entries allowed or are the traditional 30-day software demos. Exercises are provided throughout the book, which use these programs to demonstrate the features and provide a foundation in the use of current technology in the law office.

The programs can be used with exercises and case studies throughout the text but are introduced and explained in the chapters that correspond with discussion of the class of software into which each fits.

**Word Processing**

Today the most commonly used software program in the law office is the word processor.

WordPerfect

**Office Management Systems**

There are a number of office or practice management software programs available, of which AbacusLaw and Tabs3 are two of the most popular. These programs offer a number of *integrated functions* in a common package, like Office Suites.

AbacusLaw
Abacus Accounting
Tabs3
Practice Master

**Case Organization and Management Software**

Case management software can be used to organize the cast of characters in a case, the documents, the relevant time table, issues, legal authority, and other desired information. Good case management software does all of these organization functions and provides the information in an organized manner for everyone working on the case.

LexisNexis CaseMap
LexisNexis TimeMap
**Litigation Support**

Litigation support software such as Concordance provides a specialty application software program for managing these electronic documents.

Concordance

Summation

**Presentation and Trial Graphics**

Graphic creation programs are used to create graphics for presentations either as stand-alone graphics or as part of a graphics presentation, such as part of a PowerPoint presentation. The obvious advantage to this class of software is the ability of the legal team to create their own graphics without the need of graphic artists and outside consultants.

SmartDrawLegal

**The Electronic Courthouse**

Litigation support software is used in trial to display documentary evidence, graphic presentations, and simulations of accident cases. Relevant portions of documents can be displayed as the witness testifies and identifies the document for everyone in the courtroom to see at the same time, without passing paper copies to everyone.

Sanction

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