

by Robin Meadow

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## I'm a software junkie. There . . . I've admitted it.

**B**ut I'm not writing this article because I want to kick the habit. As an appellate lawyer, most of what I do is write, and most of my writing is at the computer. The many software tools I've acquired over the years have made my work more efficient and less tedious. Turning back the clock would make it less enjoyable and more expensive. Neither my clients nor I want that to happen.

So, although I'm going to share my story with you, it's not because I want your help. Instead, I want to get you hooked.

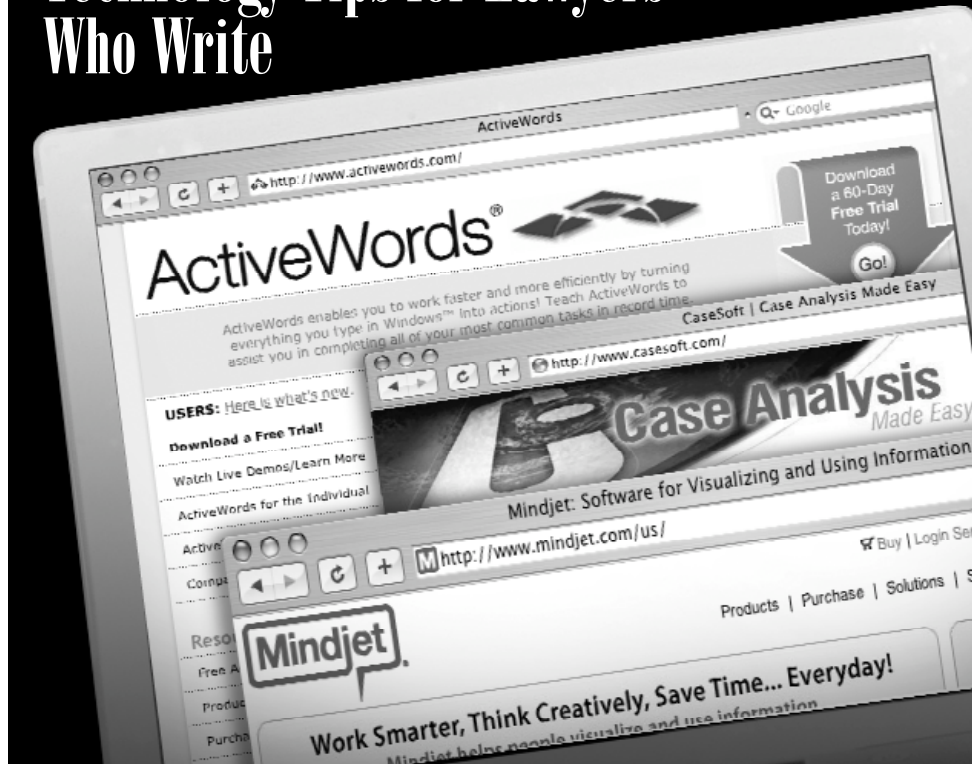
## You Can Do It.

No software program or suite - not even Microsoft Office - does everything as well as it might. But there is almost always a way to get your computer to do something you want it to do. You just have to ask. No, you don't ask the computer; you go online and search for software. There are thousands of programs, many of them free or very inexpensive, that fill the gaps left by the major software publishers. Just type "shareware" or "free software" into Google and you'll see what I mean. Start by looking for add-ins for your existing programs. The Microsoft site has dozens of these for its Office programs, and there are countless more out on the market that are free or cost relatively little. A careful Internet search will get you there. Next, prowl shareware/freeware sites. A good first stop is [www.download.com](http://www.download.com), now part of CNET ([www.cnet.com](http://www.cnet.com)).

## ActiveWords - [www.activewords.com](http://www.activewords.com).

If I had to pick one single utility to take to a desert island with my laptop (and a very long power cord), this would be it. It simplifies virtually everything I do with the computer, anywhere within Windows, to such an extent that I feel almost disabled when I have to use a computer that doesn't have the program installed.

# A Few of My Favorite Things: Technology Tips for Lawyers Who Write



At its simplest, ActiveWords is a text replacement program - that is, it replaces a code that you type with the text that you want, such as "covenant of good faith and fair dealing" for "cgf." It works much like Word's AutoText and WordPerfect's QuickWords but, unlike those program-specific text replacers, you can use ActiveWords anywhere—in Word, in WordPerfect, in email, in a spreadsheet, on the internet—anywhere you can type text. (There's just one exception: At least on some computers, ActiveWords doesn't like Internet Explorer 7C, although it's fine with earlier versions of IE and with Firefox.) So, for example, it's been years since I typed "Cal.App.4th" in a document or in a Lexis or Westlaw search; "ca4" does the job. I don't have to remember client numbers for online searches, court docket downloads, or the firm's timekeeping program—I just enter a mnemonic code and the number pops up.

But there's much more, because ActiveWords can also execute commands. Word or WordPerfect will let you build complex macros, but ActiveWords' commands will work anywhere. So, for instance, it lets me easily navigate both my firm's network and the Internet. If I regularly visit a directory that's

nested four or five levels deep on the firm's network, I simply create an "activeword" (the program's name for the code you type to trigger it) to take me there in an instant. To get to a website, I type the name and I'm there, without even having to open a browser window. When I type "com," "org," etc., a window opens up to let me insert the domain name, and the program takes me there. I type "laweather" to get to weather.com's page for today's weather in Los Angeles, "msft" to bring up Yahoo!'s page for Microsoft stock, and so on.

A lot of ActiveWords' programming capabilities are built in. It's not that hard to build your own special commands, but first look at the publisher's useful add-ins (e.g., a set of ABA codes for timekeeping) and other users' creations. I'm deeply grateful to one user (whose name unfortunately I can't find) for what he did for FindLaw searches: I enter a code, such as "ca4f" for "take me to Cal.App.4th on Find Law"; a window pops up requesting the volume number; when I provide that, a second window pops up asking for the page number; and when I provide that, the case opens up on Find Law. Very, very easy.

Warning: As simple as it is to use this program, some users find the learning curve a bit

steep. And even if you don't, you have to invest front-end time creating your "activewords." But if you need help, support *via* the website is just a click away (including active user groups). In addition, there's always a chance that Buzz Bruggeman, one of the company's cofounders (and a Duke law grad), will call you up and walk you through everything you need to know. He did this with me a number of years ago, and he still sometimes does it for new users.

You don't want to give up your AutoText or QuickWords collections that you've developed over many years? No problem—the ActiveWords staff will help you convert them to activewords. Multiple computers? Also no problem—in fact, it's a lot easier to copy a set of activewords than your Word or WordPerfect codes.

## Thinking Tools

Before I write, I've got to organize my thoughts. This process used to start with my pulling out a yellow pad and putting each topic on a separate page. Then, I'd write down my thoughts for each topic. Then, I'd shuffle the pages around to get some kind of organization, always discovering during the process that something on the Topic A page belonged with Topic C. Then, I'd write up an outline - which of course kept getting restructured as I thought through the case's issues. Erase, rewrite, start over on a clean page. Misplace one of the pieces on my desk, lose time looking for it, ultimately re-create it. You know the drill.

At some point both Word and WordPerfect introduced outlining capability, but by then I had found a much better solution. In the mid-'80s, a DOS-based program called ThinkTank emerged on the scene. This was outlining on steroids, even under DOS. It was succeeded by a much-improved version called GrandView, still DOS-based. But as Windows evolved they disappeared, apparently overwhelmed by Word and WordPerfect. There were a few Windows programs - I used Ecco Pro for a while - but none nearly as good. Then **NoteMap** ([www.casesoft.com](http://www.casesoft.com)) came along (recently acquired by Lexis). It does just one thing - outlining - but does it extremely well. I can't recommend it too highly. Instead of separate pages of a yellow pad, I toss my ideas up on the computer screen, where they're automatically placed into an outline format. I don't have to think about structure until later, and then it's a

breeze - you just move things around by clicking and dragging. The capabilities are too numerous to mention here, but I can tell you that nothing in Word or WordPerfect comes close. In fact, often the very first thing I do with a new case is to start up a NoteMap outline.

The program isn't perfect. Its interface is out of date (among other things, it never used all of the Windows menu conventions); its exporting facilities are limited (it won't create a pdf - although there are other ways to do that - or export to any version of WordPerfect later than version 9); and its formatting capabilities are too limited for it to be useful in formal presentations. But these are minor gripes. My outlines are mostly for my own use, not for an audience.

A different kind of program, and one that's a little hard to describe in words, is **Mind Manager** - [www.mindjet.com](http://www.mindjet.com). Picture a flow-chart or organization tree and you'll have an idea of what it looks like. As with NoteMap, you can simply throw ideas on the screen and later move them around to create relationships among them. But MindManager goes well beyond NoteMap because you can establish relationships among items that fall under different topics, and the fact that the program displays information graphically can often illuminate the relationships. It also means that the program can yield effective presentations which I've used to good effect in several seminars. And yes, you can generate a Word outline from the program.

These two programs illustrate my earlier point: You can't expect any program to do everything you need as well as you need. I find NoteMap much easier to use than Mind Manager for quickly getting my thoughts up on the screen in an easy-to-read format. I also find that, even with NoteMap's limitations, it's easier to generate an outline for use in Word or WordPerfect. But Mind Manager is far better at revealing relationships among ideas and developing presentations for group discussion or seminars.

Yet another kind of thought organizer that can be almost indispensable at times is a timeline maker. This is a standard trial tool for making sequences of events clear for juries, but it can be useful in other contexts as well. When a case's complexity makes it hard to keep an important sequence of events in mind, I like to have a cheat sheet readily available—an instant

graphical depiction of the events and their temporal relationships. Of course, you can do this manually on a yellow pad, if you don't mind constantly adding, erasing, discarding and re-writing. Or you could struggle through a graphics program where you have to place each element manually. But a good single-purpose program makes the job a breeze. I've used **TimeMap** ([www.casesoft.com](http://www.casesoft.com)) and **Time Line Maker Professional** ([www.timeline-maker.com](http://www.timeline-maker.com)). They both do the basic job quite well, but Time Line Maker has more features, is more flexible, and is a little cheaper. Maybe most important, it has a simpler data-entry interface and can import data from other programs.

## Writing Tools

Now you have to get the words on paper. ActiveWords will speed up the job. Here are a couple of other nifty little programs that do what no other program seems to do.

Have you ever noticed that with certain kinds of documents - web sites, pdfs, and others - when you copy text into your word processor you get a hard return at the end of every line? Maybe you've developed a macro to get rid of those. That's fine, but what if you want to copy it into an email? To the rescue: **eCleaner** ([ecleaner.tripod.com](http://ecleaner.tripod.com), by Steve Chin - no "www" for this address). Originally developed to strip out the extra characters that some email programs insert to set off earlier messages in an email thread, it also strips out hard returns. The sequence is simple: You highlight and copy the text you want to fix; you open eCleaner (basically a customized version of Windows Notepad - in fact I use it instead of Notepad); you press a button; and the text is imported and cleaned. Then you copy and paste it into whatever application you want to use it in.

But what about rich text formatting - fonts, special characters, italics, etc.? Suppose you're copying text from a heavily formatted document and you want it to adopt the formatting of your word processing document? The "paste special" command will get you there, sometimes - but unpredictably, and not in every program. **PureText** ([www.stevemiller.net/puretext](http://www.stevemiller.net/puretext), by Steve Miller) does the job better. Again, you highlight and copy the text. Then, you switch to the application you want to use, press a hot key combination that you can choose, and voila!—the text is pasted with no formatting at all. (Note, how-

ever, that “rich text” formatting doesn’t include hard returns and some other features. So I often end up using eCleaner and PureText together.)

## Keeping Track of Information

Have you ever been bothered by the fact it takes just an instant to search billions of websites worldwide, but you can’t find the brief you wrote with that great quotation about equity? What about the email that you know you wrote early in the case and that you know must be somewhere in Outlook, but it takes half an hour for Outlook’s primitive search engine to find it?

It’s taken a while, but desktop searching has finally caught up with the speed of the Internet. With the right programs, you can search everything on your desktop or your firm’s network just as quickly and effectively as you can search the Internet. My personal favorite, and a close second to ActiveWords as a program I never want to be without, is **X1** ([www.x1.com](http://www.x1.com)). For \$50, you get a program that will search everything on your hard disk and firm’s network, with instantaneous results. It’s particularly useful for email. I keep every case-related email I send or receive in a case specific folder. This means that at any given time I’ll have something like 25,000 email messages. With X1, a narrow enough search (Boolean operators plus several other search-narrowing techniques) can yield a single pertinent email in a split second. It’s the same way with data files. I have over 66,000 files (some 11 gigabytes) on my firm’s network, including thousands of archived emails for closed cases. Again, with the right input, X1 instantaneously pulls up a short list or even a single document. You can see how quickly the program works by its search-as-you-type display: a list starts when you type the first character, and keeps getting shorter as you type more. X1 also indexes Outlook’s contacts, calendar and tasks. (Can’t remember the name of that great Indian restaurant on First Avenue? Enter “First Avenue” and you’ll find it right away.) X1 updates its indexes in the background on a schedule you can set, so it’s always ready to do your bidding.

I use another program that I got before X1 came on the scene and have kept up to date, because it provides somewhat different features than X1 for searches on my firm’s network. Unlike X1, with **dtSearch** ([www.dtsearch.com](http://www.dtsearch.com)) you have to update indexes manually, which can take some time. On the other hand, dtSearch lets you prepare multiple indexes that you can tailor

for specific purposes, and you can add and delete them at any time. X1 generates a single index for all files, and I haven’t found a way to change what it indexes without deleting the index and starting over. So, for example, if I need to find something in a directory of a lawyer who left the firm a year ago, I can set up dtSearch to index just that lawyer’s materials, without having those materials get in the way of other searches.

There are many other solutions, and some of them are free. If you want to explore the area from scratch, I suggest you buy **The Desktop Search Handbook** ([shop.officewatch.com/dsh/](http://shop.officewatch.com/dsh/)), an electronic book that you can download (including updates). At the institutional level, both Westlaw and Lexis have services that will index as much of your firm’s network as you want, with the results searchable through the regular Lexis and Westlaw programs. Another well recognized player is **Isys** ([www.isyssearch.com](http://www.isyssearch.com))—but at \$1,000 for the entry level version, it may be out of reach for small offices. (Isys does offer a standalone email program for \$30—see [www.isysemail.com](http://www.isysemail.com).)

At the other end of the spectrum, both Google and Yahoo! offer free desktop search engines; Yahoo!’s is a limited version of X1 (the last time I checked, it would only index a local drive, not a network). I don’t see an advantage to either—I’d rather have the full X1 program, and I don’t much like the way Google displays search results. I also don’t know whether either program connects you to the Internet in a way that might trigger privacy concerns.

## Saving Time

Every lawyer needs to do this. The time you waste doing mechanical tasks on the computer could be better spent analyzing a case or talking to a new client. All of the tools I’ve described help me save time, but here are two that are designed solely for that purpose.

**Anagram** ([www.getanagram.com](http://www.getanagram.com)), an Outlook add-in, is one of those gems that does just one thing very well. You highlight a name and address in an email, in a letter, on a webpage, wherever; you hit a hotkey; and Outlook opens up a new contact form with all of the information in the proper fields. It’s not infallible, because not everyone formats their contact information in the same way, but it works well enough to save a lot of typing. It also gives you a way to paste contact information into an email or other document so that it looks nice instead of

the clunky way it comes out if you do a copy-and-paste from within Outlook.

IT people tell us to use secure passwords for website and other logins - meaning at least eight characters mixing letters, numbers and symbols—and not to use the same password repeatedly. Only a mathematical savant has any hope of remembering more than a handful. **RoboForm** ([www.roboform.com](http://www.roboform.com)) does the job for you. You right click on an icon in your system tray, a list of logins pops up, you click on the one you want, and RoboForm takes you to the login page and enters your login information. Although once in a while it doesn’t recognize a login page, it does the job 98% of the time. There’s also a utility that lets you keep the same information on your handheld and update it whenever you synchronize, and another that lets you keep everything on a USB key for when you travel.

But what if you create a login at your office and you need to use it at home? No problem - use **GoodSync** ([www.goodsync.com](http://www.goodsync.com)) by RoboForm’s publisher, Siber Systems. You install it on one computer (probably home), log in to the other (probably office desktop), click a button, and all of your RoboForm logins are synchronized. And it will work with other content, too. I have a directory on both my home and office computers where I keep links to the docket pages for every appeal I’m working on. GoodSync ensures that the link I created at home also resides at the office.

These are just a few of the programs that can make your computing life easier. Don’t be intimidated by the time and effort it takes to find, install, and learn programs. It definitely gets easier with experience, and I guarantee that you’ll find the investment worthwhile.



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