

Microsoft Word in the Law Office & Document Automation Systems

How to Dramatically Improve Speed and Accuracy While Drafting Complex Legal Documents

Tuesday, July 12, 2016 | 9:00 a.m. – 12:00 p.m.

3.0 MCLE Credits in Skills

How to Achieve Meaningful Paper Reduction in Your Practice

A Lawyer's Guide to PDFs, Scanners and Best Practices for Digitizing Incoming Documents

Tuesday, July 12, 2016 | 1:00 p.m. – 4:00 p.m.

3.0 MCLE Credits in Law Practice Management

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CLE Programs & Live Webcasts

NYSBA Member Price: \$135 per program

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www.nysba.org/July12thCLEs

Attend in Person!

NYC | Executive Conference Center
1601 Broadway at 48th | NYC

Both programs will be streamed as Live Webcasts.



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Conquer Word formatting and styles to save time and create better legal documents

- Document Assembly and Automation for Your Practice
- Better Methods for Drafting Legal Documents

Carefully crafted model documents and templates are critical for most practice areas. They help prevent malpractice, increase profitability and are a primary method for transferring knowledge to others in your firm. This seminar will show you how to find the best of what your firm has created in the past. You'll learn the rules for consolidating your intellectual capital into usable templates. Learn about the spectrum of automation tools demonstrated from the amazing things your word processor is already capable of, from simple Word functionality to document assembly applications like HotDocs.

For document-intensive and transactional areas of practice, improving drafting speed and accuracy directly impacts the bottom line while improving client satisfaction.

- A. Legal Drafting Methodologies
- B. Drafting Legal Documents Using Templates
- C. Reducing Drafting Errors & Controlling Staff Work Product
- D. Commercial Drafting Systems
- E. Forms Practice
- F. Automating Your Document Drafting: Advantages & Pitfalls

One of the most potent ways to improve the bottom line of a document-intensive practice is to improve efficiency. You can achieve this via subscription drafting systems (which are typically practice-area specific) and/or building a drafting system from your own documents. We'll discuss the pros, cons and options for both approaches.

Topics include:

- Problems associated with creating new documents by saving old ones as a new file name and making changes
- Subscription drafting systems – what you need to know and who the big players are
- The important differences between templates and documents
- How to build your best content into intelligent, annotated templates
- How to incorporate the high-end functionality of Microsoft Word into your templates so they are effortless to edit
- Automation options from the functionality built into Word to document assembly programs like HotDocs

These classes are designed by lawyers, for lawyers. These programs are transitional; both newly admitted and experienced practitioners will benefit by participating.

Register Online | www.nysba.org/MicrosoftWordintheLawOffice

How to Achieve Meaningful Paper Reduction in Your Practice

A Lawyer's Guide to Adobe Acrobat, Scanners and PDFs

Tuesday, July 12, 2016 | 1:00 p.m. – 4:00 p.m.

3.0 MCLE Credits in LPM

CLE Program and Live Webcast

NYC | Executive Conference Center | 1601 Broadway at 48th Street

Nearly every public and private organization which previously dealt with a lot of paper has been trying to systematically remove it from their operation. Law firms and legal departments are certainly not immune to this economic reality. Most lawyers have had scanners for years but still feel buried in paper. This is because the tools for scanning are only part of the solution. To really solve the problem, you'll need a lot more than a good scanner. This seminar lays out the roadmap to follow if you want to unbury yourself, from hardware to software to procedures.

Sick of dealing with all of the paper? Learn how to liberate yourself and your office.

- Rules for backing up client data and addressing security issues
- Necessary hardware – scanners, multiple monitors, notebooks and/or tablets
- Appropriate scanner settings related to dpi and color mode
- Different types of PDFs you can create and why it matters
- Document management systems and search utilities
- Best practices for storing email and attachments outside of an email application (without printing them)
- Strategy for digitizing incoming documents
- Required collaborative technologies when working with an electronic file

PDFs have become the file format of choice when exchanging documents with other lawyers and clients. Many courts now require that all pleadings be filed as PDFs and most governmental forms are available exclusively in PDF format. Everyone in your office needs to understand the risks and benefits of PDF files.

Get an Overview of Essential Law Firm Technology

Learn How to Protect Yourself While Exchanging Documents Electronically

Software, Equipment and Technology Power Hour

- Essential Law Firm Technology—The Best of What's Out There
- Scanners and Printers for Your Law Office

Adobe Acrobat and PDF Tips and Techniques

- Scanning to create PDFs
- Making PDFs of Word/WordPerfect documents and email
- Creating Word files from PDFs
- Creating fillable PDF forms
- Adding comments, markup and annotations to PDFs
- Electronic signatures using the Stamp tool

Creating Files for Review by Others

- Email and shared reviews
- Tracking changes made to a PDF
- Producing redlines comparisons of two PDFs
- Bookmarks and improving navigation of long PDFs
- Combining PDFs, reducing file size and other file manipulations

Register Online | www.nysba.org/MeaningfulPaperReduction

Microsoft Word in the Law Office and Document Automation Systems

How to Dramatically Improve Speed and Accuracy While Drafting Complex Legal Documents

Are you tired of wrestling with Word every time you have to draft something more complex than a letter? Do you wish you could control Word's formatting and gain a better understanding of how it works? Do you miss WordPerfect? If the answer to any of these questions is yes, this is your class! Word classes designed for the general public just don't address the issues legal professionals face when drafting legal instruments. This class is designed by lawyers, for lawyers.

How to Achieve Meaningful Paper Reduction in Your Practice

A Lawyer's Guide to Adobe Acrobat and PDF Files

Have Scanners But Still Buried in Paper? Printing, moving, storing and managing paper is expensive. For those reasons, nearly every public and private organization which previously dealt with a lot of paper has been trying to systematically remove it from their operation. Law firms and legal departments are certainly not immune to this economic reality. Most lawyers have had scanners for years but still feel buried in paper. This is because the tools for scanning are only part of the solution. To really solve the problem, you'll need a lot more than a good scanner. This seminar lays out the roadmap to follow if you want to unbury yourself, from hardware to software to procedures. Sick of dealing with all of the paper? Learn how to liberate yourself and your office.

\$135 NYSBA Members per program. Register for both and save 25%! If you are interested in both programs, please call the Member Resource Center at 800-582-2452.

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3.0 TOTAL CREDITS for each Program

This course has been approved for MCLE credit in New York for all attorneys, including newly admitted (less than 24 months).

This program has also been approved for MCLE credit by the **State Bar of California** and the **Pennsylvania Continuing Legal Education Board** for **2.5** credit hours of substantive law and **0.0** credit hours of ethics. All inquiries regarding MCLE credits may be directed to **(518) 487-5606**.

These programs have been approved by the **Board on Continuing Legal Education of the Supreme Court of New Jersey** for **3.0** hours of total CLE credit each. Of these, **0.0** qualify as hours of credit for ethics/professionalism, and **0.0** qualify as hours of credit toward certification in civil trial law, criminal trial law, workers' compensation law and/or matrimonial law. This course does not qualify under any of the nine specified new admit areas, in five of which New Jersey attorneys admitted in 2009 or thereafter, in their first full two-year compliance period, must take 15 of their 24 required credit hours (see [BCLE Reg. 201:2](#)).

The New York State Bar Association's Committee on Continuing Legal Education has been certified by the New York State Continuing Legal Education Board as an accredited provider of continuing legal education in the State of New York.

IMPORTANT NOTICE: PARTIAL CREDIT FOR PROGRAM SEGMENTS NOT ALLOWED. Under the New York State Continuing Legal Education Board Regulations and Guidelines, attendees at CLE programs cannot receive MCLE credit for a program segment unless they are present for the entire segment. Persons who arrive late, depart early, or are absent for any portion of the segment will not receive credit for that segment.

Featuring Barron K. Henley, Esq



Barron K. Henley, Esq. is one of the managing partners of Affinity's Columbus Ohio office. He is an attorney with 15 years of experience in legal technology. Together with Paul Unger, Barron founded Henley March & Unger Consulting, Inc. (now Affinity-Columbus) in 1998.

He received his B.S./B.A. (marketing and economics) and J.D. from The Ohio State University and is a member of the American, Ohio and Columbus Bar Associations, and the Worthington Estate planning Council. Mr. Henley is a member of the ABA Law practice Management Section and the Technology Committee, the Visioneer Legal Advisory Board, and the Columbus Bar Association Law 2010 Committee. He's also a member and former Chair of the Ohio State Bar Association Law Office Automation & Technology Committee. Barron is one of the most renowned experts on Microsoft Word, Adobe Acrobat and HotDocs. In fact, he heads Affinity's HotDocs document assembly and software training departments.

A frequent speaker, Barron teaches CLE classes covering practice management, document management, file management, server and personal computer issues, remote access, mobile lawyering, scanning and imaging, legal paper reduction strategies, electronics case filing, Word, Excel, Outlook, Wordperfect, HotDocs document assembly, Adobe Acrobat, malpractice avoidance, and many other topics. He has spoken at state and local bar association throughout the U.S. as well as the annual ABA Tech Show.

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INFORMATION AND POLICIES

Pre-registration Strongly Advised: You can save money and guarantee your seat and course materials by registering early. Seating is limited in all locations and registrations are taken on a first-come, first-served basis.

Cancellations Are Easy – Full Refunds Are Given: Your full registration fee will be refunded if you give us notice no later than the close of business (4:45 p.m. EST) three business days prior to the date of the program for which you registered. Registrations canceled less than three business days from the program date will be assessed a cancellation fee of \$25.00. To cancel, call or email the Member Resource Center at (800) 582-2452 or mrc@nysba.org. If you do not cancel and do not attend the program, access to a complete set of course materials in PDF format will be forwarded to you via e-mail in consideration of the registration fee. Non-registrants may purchase program materials after the final program date.

MCLE Credit: This program is acceptable for MCLE credit in New York and many other MCLE jurisdictions.

Tuition Assistance: New York attorneys may apply for tuition assistance to attend this program based on financial hardship. Any New York attorney who has a genuine financial hardship may apply for tuition assistance for a CLE program by completing a *Tuition Assistance Request Form* and returning it to the CLE Department no later than five working days prior to the program, explaining the basis of his/her hardship. If granted, the attorney will receive tuition assistance, depending on the individual's circumstances. For more details, please contact Holly Murray at (518) 487-5586.

Group Discounts: Subject to availability and exclusions, group discounts are available to law firms and organizations sending 3 or more employees to any one NYSBA CLE program. Please contact Holly Murray at (518) 487-5586 for more information.

CLE Coupon Plan: For more information on our CLE Coupon Plan offering substantial savings on full-day, live programs, please contact the Member Resource Center at (800) 582.2452.

Recording of NYSBA Seminars in any form is strictly prohibited.



Accommodations for Persons with Disabilities: NYSBA welcomes participation by individuals with disabilities. NYSBA is committed to complying with all applicable laws that prohibit discrimination against individuals on the basis of disability in the full and equal enjoyment of its goods, services, programs, activities, facilities, privileges, advantages, or accommodations. To request auxiliary aids or services or if you have any questions regarding accessibility, please contact Cindy O'Brien at (518) 487-5585 or cobrien@nysba.org.

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NYSBA Law Practice Management

Whether you're a solo practitioner or a managing partner at a national law firm, you'll find law practice management resources to meet your day-to-day practice needs. Checklists, best practices, publications, and continuing legal education programs provide up-to-date information and practical tips to help you better manage your law practice.

Starting a Practice | Managing Your Practice | Protecting Your Practice | Technology and Your Practice | Marketing Your Practice | Escrow Accounts, IOLA, Ethics | Selling Your Practice and Retirement | Planning Ahead

www.nysba.org/LPM

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New York City

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4 WAYS TO REGISTER

Online www.nysba.org/CLE

Call **1.800.582.2452** (U.S. and Canada) or **518.463.3724** in Albany and surrounding area

Download an order form online at www.nysba.org/CLEOrderForm and

Mail Member Resource Center
New York State Bar Association
One Elk Street
Albany, NY 12207

Fax **518.463.5993**

Pricing **NYSBA members: \$135.00**
Non-members: \$235.00

Note Registrations canceled less than three days from the program date will be assessed a \$25.00 cancellation fee.

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