

Chicago Daily Law Bulletin

Since 1854

Wednesday, June 2, 1993

Writing law office manuals, computerizing law practice

Every law office needs a written office manual, a comprehensive document useful both as a teaching tool for new employees and as a reference source for long-timers. Not every law office has an office manual, and we suspect many that do don't have a very good one. And even the good ones are either under continual review or somewhat out of date.

This week we look at very low-tech assistance for the lawyer or office manager who is given the unenviable job of creating one. We also look at a book that promises to tell us how to practice law with computers.

Cadence PPM, ABA office manual

We received the Cadence Policy and Procedures Manual (PPM) as an Apple Macintosh-formatted disk with 15 Microsoft Word files totaling 400 kilobytes. "Installation" involved nothing more than copying the contents of the disk to a new folder on our hard disk.

We double-clicked the file name of the first file. The Macintosh noted that the file was created by Microsoft Word, located and loaded Word, then loaded the data file. (This capability to automatically launch an application by double-clicking on a data file's name or icon is not, of course, an innovation of Cadence, but is built into the Macintosh operating system.)

Most Macintosh word processors convert Word files, but if your word processor doesn't, the author will provide the files in your choice of formats. In fact, the author, a confirmed long-time Macintosh enthusiast, will even provide disks in MS-DOS format, if necessary.

As a printed copy of the document is not provided, we first printed it out from the disk. The files were linked so that after beginning to print the first file, we had only to fill the paper tray and empty the delivery tray until the last page of the last file was complete.

The American Bar Association's Law Office Staff Manual came in both ASCII and WordPerfect 4.2 formats. We copied the 18 files totaling about 325,000 kilobytes in the WordPerfect format. The ABA manual includes a printed copy with the disks, making a preliminary printout unnecessary. The

Law technology review

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WordPerfect version includes auto-paragraph numbering setups, making it unnecessary to renumber paragraph as you insert, delete and move paragraphs to suit your purposes.

The concept

The two products are similar in concept, each providing the outline of a law office manual, with suggested policies, forms and examples. Each provides extensive bibliographies. Neither product attempts the impossible task of producing a finished manual. We think of both products as manual kits.

The two products do differ in style and emphasis. Although either manual is adaptable for a small or large firm, Cadence is definitely written from a small-firm perspective, while the ABA manual seems to have the general perspective of a much larger firm.

Cadence, for example, includes a checklist detailing such things as the name of the staff members responsible for checking for overnight fax messages in the morning and closing the supply door at the end of the day. The ABA manual includes a policy explaining that all word processing center documents are produced ASAP and that any document needed within 24 hours must be marked RUSH.

Cadence is written with a light touch; the ABA manual, by contrast, seems stodgy and in some cases simply overwritten. (Is it really necessary to include seven alternative paragraphs claiming that publication and delivery of the manual does not constitute a contract of employment?)

Both products include suggested

statements as to vacation and smoking policies, but Cadence is also a repository of post office state abbreviations, local court motion practice, word processor letter setups, and standard equipment that should be available at each desk.

Also included in Cadence is excellent advice, particularly to young attorneys, on matters such as how to break bad news to a client. As a bonus, the author has tossed in application and interview forms, acceptance and rejection letters, and even a series of legal assistant employment tests. We would like to see a good index, but the table of contents makes it possible to find what you need.

Both products have text in the computer rather than written in stone. Use these programs as checklists and departure points. The manual completed from using either product as a starting point should show the personality of the firm.

Value

If you are in the process of drafting an office manual, either product will help, and they are well worth the money. Buy both, if you can, but if you decide to purchase only one, we prefer Cadence, particularly for small offices and for attorneys opening up a law office for the first time.

Practicing law with computers

Perhaps the most difficult part of writing these columns is presenting sometimes-difficult technical subjects with a restricted word count and a minimum amount of computer jargon. On occasion we use too much jargon, and do hear about it from readers. Life would be much easier if all of our readers either had vast computer experience or a copy of Professor Henry Perritt's "How to Practice Law with Computers."

This 1,200-page volume from the Practising Law Institute begins with an easy-to-understand chapter on basic computer concepts. The book continues with material on word processing and desktop publishing, telecommunications, computer-assisted legal research, financial analysis and spreadsheet software, and database management. Final chapters concern automating the law office, management issues and artificial intelligence. The

author combines an engineering and business school background with his law practice and teaching experience to present a book which can be understood by the practicing lawyer who is also computer-disadvantaged.

The book's design is to present, with respect to each major topic, the type of practice activity covered, an "overview" of the technology, a discussion of specific products, management considerations, and abbreviated "case studies" of how law firms have used the technologies. The book is replete with footnotes including addresses and phone numbers, as well as a good index, and can function as a resource directory.

The overview tends to provide a bit too much history for our taste, and the specific product discussions sometimes are out of date, which is understandable in a year-old book. We could quibble with some of the history, and wonder about such undocumented comments as "A major weakness of LEXIS is that its database contains significant errors that are never corrected."

At \$110, "How to Practice Law with Computers" is expensive. Lawyers who

are experienced computer users will find the book interesting. But we think that specific discussions on the technology and how it is used and might be used in the future will prove invaluable for lawyers who are not well-acquainted with computers but feel an understandable pressure to automate.

Summary

The ABA's Law Office Staff Manual and the Cadence PPM manual are two different approaches to the creation and maintenance of a law office manual. Either would be a big help if your existing manual needs work, but we prefer the Cadence approach, particularly for young lawyers and small offices.

Professor Perritt's "How to Practice Law with Computers" presents a wealth of information about computers generally, and law office automation specifically. Invaluable for the computer-disadvantage, even experienced computer users will find it useful.

Details

Cadence PPM — Policy and Procedures Manual, Version 2.0, by

Daniel Kegan. Requires Apple Macintosh computer running Microsoft Word, or other word processor. Available in other formats. Price: \$69.50. Greenlight Software, a division of Elan Associates, 79 West Monroe, Suite 1320, Chicago, Ill., 60603-4969. Phone: (312) 782-6496. Fax: 312-782-6494.

Law Office Staff Manual, Model Policies and Procedures for Law Office Personnel, Second Edition, by Berne Rolston, Revised by Robert C. Wert and Howard I. Hatoff. Requires IBM-PC or compatible. Price: \$79 for members of the ABA Section of Law Practice Management, \$89 for non-members. American Bar Association, Order Fulfillment, 750 N. Lake Shore Drive, Chicago, Ill., 60611. Phone: (312) 988-5555.

"How to Practice Law with Computers," Second Edition, by Henry I. Perritt Jr. 1,208 Pages. ISBN: 0-87224-038-X. Price: \$110. Practising Law Institute, 810 Seventh Ave., New York, N.Y., 10019. Phone: (212) 765-5610. Fax: (212) 581-4670.