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The Legal Tech Audit: Focus on PDFs

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The Legal Tech Audit *Focus on PDFs*

Exercise #1 Create & Edit

- Import a document to work on in Adobe Acrobat
- Apply a template and fill in the blanks
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Assessment & Certificate

On your handout, there is a link to the PDF version of our legal readiness assessment template and instructions.

Attach all three sections, complete each assessment, and upload them to <https://forms.lawguru.com/legaltechaudit>.

Deadline is March 15th

Next session is March 18th (Monday)

So, what is the Audit?

The Audit is a self-assessment tool that helps you identify areas of your legal practice that need improvement.

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The Stats

- Audit was taken 10 times by 8 firms
- (5 firms took it twice)
- ALL the firms failed
- The audit takes 1 hour (or less) to pass
- Best: 2.5 hours
- Average: 8 hours
- Average: 5 hours

Lack of Training

There is a lack of training in the legal profession.

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Exercise #2 Sanitize & Protect

- Sanitize a document to remove sensitive information
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So What Do I Need to Know?

Adobe Acrobat Pro

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Why PDFs?

- PDFs are the standard for legal documents
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The Legal Tech Audit

Focus on PDFs



The Stats

- Audit was taken **10 times by 9 firms**
 - (1 firm took it twice)
- **ALL the firms failed**
- The audit takes 1 hour (or less) to pass
- Best= 2.5 hours
- Worst = 8 hours
- Average pace = 5 hours

http://www.abajournal.com/legalrebels/article/could_you_pass_this_in-house_counsels_tech_test

So, what is the Audit?

"...hypothesis is that lawyers in general are woefully deficient in using the software tools at their disposal – e.g., Word, Acrobat, Excel."

The audit tests this by providing mock assignments.

Sample tasks include:

- formatting a motion in **Word**
- preparing motion exhibits in **PDF**
- creating an arbitration exhibit index in **Excel**.

The specific tasks are of little importance as they are designed to test general skills. The foregoing examples could just as easily be any of the other myriad, routine, low-value-added tasks that lawyers regularly complete on their computers (or should).

http://www.abajournal.com/legalrebels/article/could_you_pass_this_in-house_counsels_tech_test

Lack of Training

"It's not incompetence, it's lack of training."

There is a new **American Bar Association** rule for this: amendments were added in August to the ABA's rules that govern professional competence which now expressly state a duty to be aware of and use technology.

Bay, Monica. "Big Law Whipped for Poor Tech Training." The American Lawyer Online. ALM Media Properties, 22 May 2013. Web. 27 Oct. 2014.



Why PDFs?

- standard for filing and exchanging docs in the legal setting
- can be read on virtually all devices
- ensures work looks right
- ensures work is secure

EDITS



***Quicker
& Easier***

PROTECTION



- passwords
- encryption
- sanitization
- link removal



FORMS

- online
- in reader
- print

PDF Editors / Readers

- Adobe Acrobat Reader
- Preview
- Foxit
- CutePDF
- PDF Forge
- PDF Studio Pro
- PDF Pen Pro

*use Pro for free in
the law library at
the public computers
or the computer lab*

Adobe Acrobat Pro (\$70 via UGA)

So What Do I Need to Know?

First, let's take a look at the full list:

http://www.legaltechaudit.com/projects/LTA_Feature_List.pdf

Adobe Acrobat Pro

- Add/Edit/Remove **text, objects and links**
- Add/Extract/Remove **pages**
- Create Single **PDF from multiple** others
- Add/Remove/Protect **Bates Numbering**
- **Encrypt** and **Sanitize** PDFs
- Create PDF **forms** and **Sign** them



Exercise #1

Create & Edit

- *Export/save a document in Word as a PDF (and back again)*
- *Add/Edit/Remove: text, links, images*
- *Clean up scans*
- *Add/Extract/Delete pages*
- *Create single PDF from multiple PDFs and/or image files*
- *Add Bates Numbering*

Exercise #2

Sanitize & Protect

- *Understand the different types of links can appear in a PDF*
- *Remove most links easily and Edit others*
- *Ensure that Bates Numbering cannot be altered*
- *Remove metadata/other hidden info or objects (sanitize!)*
- *Encrypt a PDF with passwords or certificates*



Exercise #3

Create & Edit Forms

- Understand the benefits of a form being "fillable" online or in a reader
- Create a form:
 - auto-detect certain things like blank lines
 - add custom fields like radio buttons / check boxes
 - add signature area

Assessment & Certificate

On your handout, there is a link to the PDF portion of our tech audit readiness assessment template and instructions.

Attend all three sessions, complete each assessment, and upload them to <http://www.law.uga.edu/legal-tech-audit>

Deadline is March 27th

Next session is March 18th (Word)

LEGAL TECH

SESSIONS



Attend any of our free sessions, pass an assessment and get certified!

2015

6 Tech Sessions

2 Opportunities to Learn
x 3 Essential Programs

Classroom B



MS EXCEL

JAN 13th @ 11:30 am
FEB 25th @ 2:30 pm



ADOBE ACROBAT

JAN 27th @ 11:30 am
MAR 4th @ 2:30 pm



MS WORD

FEB 10th @ 11:30 am
MAR 18th @ 2:30 pm



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Deadline is March 15th

Next session is March 18th (Wed)

So, what is the Audit?

The Audit is a process of reviewing your legal documents to ensure they are up to date and accurate.

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