



## Technology Survey – Practical Use of Technology for Lawyers – Source Links – Course 3214

### Office 365

#### Software Overview

- Word
  - o [Redline](#)
  - o Convert Word to PDF
- Outlook
  - o [Rules](#)
  - o [Signatures](#) (multiple) -
    - Required disclosure
  - o Cool Tricks
    - [Requesting a read receipt](#)
    - [Delayed send](#)
  - o [Change viewing format](#) - Show the first 3 lines in an email -
  - o [Email recall](#) – inadvertent fax is the same as email -
  - o General Etiquette – reply all, forward
- PowerPoint
  - o [Embed videos](#)

#### Cloud-based or Client Copy

- Cloud-based is a subscription to Office 365 Suite which can be accessed from any device and usually costs less than \$200.00 per year.
- Client copy is installed on your hard drive on a specific computer.

#### Ethics and Cybersecurity

- Ethical Duty of Competence: [Rule 4-1.1 \(Competence\)](#)
  - o ***This includes knowledge, skill, and preparation as they relate to technology. See Comments to Rule 4-1.1.***
- Inadvertent Disclosure of Information: [Rule 4-1.6\(e\)](#)
  - o Hackers frequently target law firms. The most notable example known to date is Mossack Fonseca, the firm whose hacked client files resulted in [The Panama Papers](#).
- Ethics Opinions:
  - o Florida's ethical rules apply to provision of legal services over the Internet. [Fla. Bar Ethics Op. 00-4 \(2000\)](#).
  - o Sending lawyer's obligation to take responsible steps to safeguard the confidentiality of all communications sent by electronic means, including information contained in metadata. [Fla. Bar Ethics Op. 06-2 \(2006\)](#).
  - o Same applies to information stored on hardware. [Fla. Bar Ethics Op. 10-2 \(2010\)](#).
  - o Ethical obligations for non-lawyer assistance apply. [Fla. Bar Ethics Op. 07-2 \(2008\)](#).



- A few resources on cybersecurity and client information management:
  - o [Legal Fuel](#)
  - o [Sedona Conference](#)
  - o [Lawyerist](#)

### **Adobe Acrobat**

- [Adobe Tool Center](#)
- [Enhanced Scan Tool – Optical Recognition](#)
  - o Smart documents – searchable and editable
- [Comments and Markup](#)
- [Document Comparison](#)
- [Convert PDF to Word](#)
- Accessibility (ADA Compliance)
- [Redaction](#)
- [Protecting or encrypting a PDF document](#)
- [Printing](#)
- [Metadata](#)
- Submitting through the efile system
  - o RULE 2.526. ACCESSIBILITY OF INFORMATION AND TECHNOLOGY Any document that is or will become a judicial branch record, as defined in rule 2.420(b)(1), and that is transmitted in an electronic form, as defined in rule 2.525, must be formatted in a manner that complies with all state and federal laws requiring that electronic judicial records be accessible to persons with disabilities, including without limitation the Americans with Disabilities Act and Section 508 of the federal Rehabilitation Act of 1973 as incorporated into Florida law by section 282.603(1), Florida Statutes (2010), and any related federal or state regulations or administrative rules.

### **Adobe Data Sanitizing**

- **Roger Chance – Presentation**

### **Legal Fuel Pop-Up**

### **Social Media**

- Advertising rules
  - o [Florida Bar Standing Committee on Advertising \(SCA\) Website](#)
  - o Application of Advertising Rules: [Rule 4-7.11](#)
  - o Required Content: Rule [4-7.12](#)
  - o Filing Requirement: Rule [4-7.19](#)
  - o Exemptions:
    - “Safe Harbor” [Rule 4-7.16](#) (presumptively valid content), Exemptions from Filing Requirement:



- Professional announcement cards sent only to existing and former clients, other lawyers, relatives and close personal friends
  - Lawyer and law firm websites
  - Lawyer and law firm social media pages (SCA decision)
  - Videos posted on video sharing sites (SCA decision)
- Common uses of social media: see SCA's [social networking guidelines](#) and [video sharing guidelines](#)
- Etiquette:
- Rule 4-8.4(d): Lawyers are required to refrain from knowingly disparaging or humiliating other lawyers. The first amendment does not protect those who make harassing or threatening remarks about the judiciary or opposing counsel. *See Florida Bar v. Wasserman*, 675 So.2d 103, 104-05 (Fla. 1996).
    - [Florida Bar suspends attorney for harassing opposing counsel](#)
  - [You never know whom you'll meet on social media.](#)